

Acumens History Management Functional Document

Prepared & developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	05-24-2024		Document Prepared
2.0	05-28-2024		Add Raw Data Access
3.0	09-16-2024		Remove Enhancements Section

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HISTORY MANAGEMENT

Acumens History Management app introduces tracking of record changes where a record is created on the corresponding History Table for each change.

The whole record is inserted unlike change log where only the differential is created.

The Tables to be tracked are defined in setup.

1. Master Records:

History Management on Master records is done for three changes:

- I. Change Log – this is record specific. Tracks insert and modify for individual Records.
- II. Deleted Records – this is for the whole table. Keeps track of all entries that have been deleted from the master table.

Example Customer:

Dynamics 365 Business Central

CUSTOMER CARD | WORK DATE: 1/27/2022

10000 · The Cannon Group PLC New

Process New Document Request Approval Navigate Customer Acumens Address Verify Show Attached Actions Navigate Report Fewer options

Change Log Comments Change Log Show Delete Entries

No.	10000	Service Zone Code	M
Name	The Cannon Group PLC New	Document Sending Profile	
IC Partner Code		Total Sales	37,120.08
Balance (\$)	266,007.71	Costs (\$)	10,462.51
Balance Due (\$)	-3,842.54	Profit (\$)	25,986.57
Credit Limit (\$)	0.00	Profit %	71.3
Blocked		CFDI Purpose	
Privacy Blocked	<input type="checkbox"/>	CFDI Relation	
Salesperson Code	PS	Last Date Modified	5/20/2024
Responsibility Center	BIRMINGHAM	Disable Search by Name	<input type="checkbox"/>

1.1. Change Log

This shows the history for the record sorted with the version and the most current displaying.

Dynamics 365 Business Central

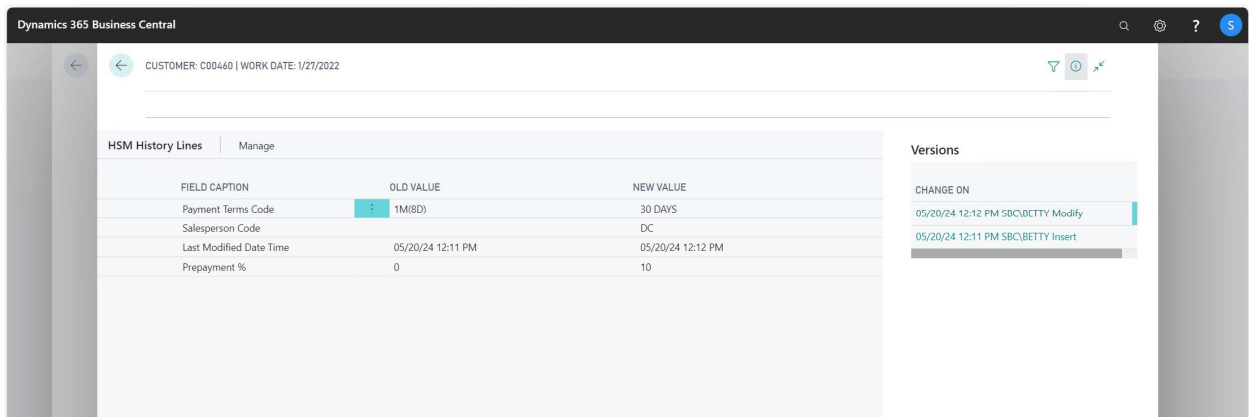
CUSTOMER CARD | WORK DATE: 1/27/2022

C00460 · Test History Management

Process New Document Request Approval Navigate Customer Acumens Address Verify Show Attached Actions Navigate Report Fewer options

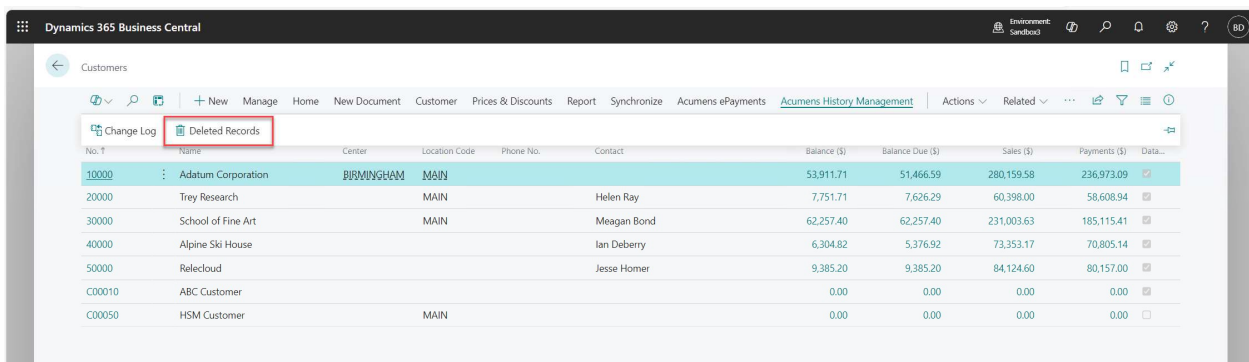
Change Log Comments Change Log Show Delete Entries

No.	C00460	Service Zone Code	
Name	Test History Management	Document Sending Profile	
IC Partner Code		Total Sales	0.00
Balance (\$)	0.00	Costs (\$)	0.00
Balance Due (\$)	0.00	Profit (\$)	0.00
Credit Limit (\$)	0.00	Profit %	0.0
Blocked		CFDI Purpose	
Privacy Blocked	<input type="checkbox"/>	CFDI Relation	
Salesperson Code	DC	Last Date Modified	5/20/2024
Responsibility Center		Disable Search by Name	<input type="checkbox"/>

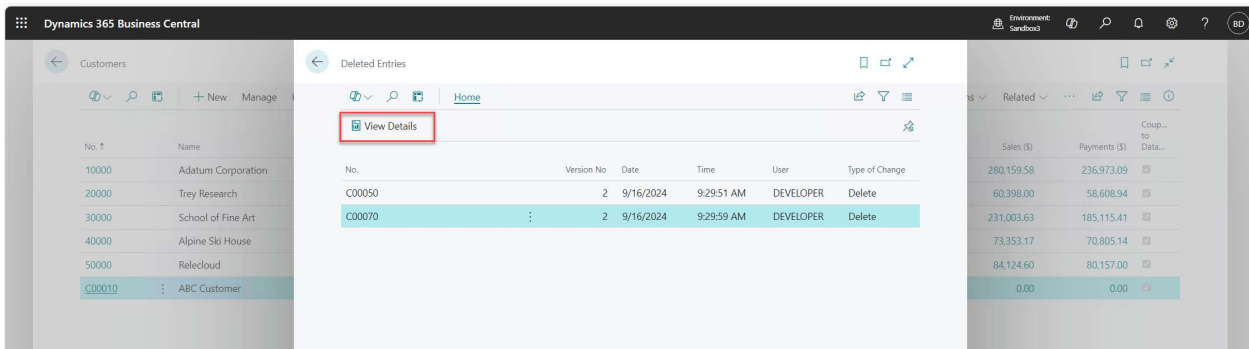


1.2. Deleted Records

This action shows all deleted master records.



It opens a dynamic page with a list of all deleted records. From this page you can access deleted record details through the page action "View Details":



2. Transactional Documents

History Management on Transactional Documents is done for two changes:

- I. Change Log – this is record specific. Tracks insert and modify for individual Records.
- II. Deleted Records – this is for the whole table. Keeps track of all entries that have been deleted from the master table.

Example Sales Order

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1/27/2022

1026 · The Cannon Group PLC New

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Acumens Address Verify Show Attached Actions Navigate Report ...

Change Log Show Delete Entries Create Inventory...t-away/Pick...

Contact No. CT000008 Assigned User ID Open

Phone No. Status Open

Email CFI Purpose

Contact Mr. Andy Teal CFI Relation

No. of Archived Versions 0 WORK DESCRIPTION

Document Date 1/27/2022

Posting Date 1/27/2022

Acumens Address Verify Show more

Ship-to Address Verified Zip+4 Address Updated

Lines	Manage	Line	Order	Fewer options							
TYPE		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
Item		1001	Touring Bicycle	BLUE	2			PCS	223.00	ATLANTA, GA	
Item		1920-S	ANTWERP Conference Table	BLUE	1			PCS	647.80	ATLANTA, GA	FURNITURE

Subtotal Excl. Tax (USD) 1,093.80 Total Excl. Tax (USD) 1,093.80

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 38.87

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1/27/2022

1026 · The Cannon Group PLC New

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Acumens Address Verify Show Attached Actions Navigate Report ...

Country/Region Code: US Responsibility Center: BIRMINGHAM

Contact No.: CT000008 Assigned User ID:

Phone No.:

Email:

Contact: Mr. Andy Teal Status: Open

No. of Archived Versions: 0 CFDI Purpose:

Document Date: 1/27/2022 CFDI Relation:

Posting Date: 1/27/2022 WORK DESCRIPTION:

Acumens Address Verify

Ship-to Address Verified: Zip+4 Address Updated:

Lines Manage Line Order Fewer options

New Line Delete Line Change Log Select items...

TYPE	NO.	DESCRIPTION	CODE	QUANTITY	ORDER	QUANTITY	CODE	EXCL. TAX	CODE	CODE
Item	1001	Touring Bicycle	BLUE	2			PCS	223.00	ATLANTA, GA	
Item	1920-S	ANTWERP Conference Table	BLUE	1			PCS	647.80	ATLANTA, GA	FURNITURE

Subtotal Excl. Tax (USD): 1,093.80 Total Excl. Tax (USD): 1,093.80

Inv. Discount Amount Excl. Tax (USD): 0.00 Total Tax (USD): 38.87

2.1. Change Log

Change log on transaction documents is on the header and the lines:

The below keeps track of the document changes:

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1/27/2022

1026 · The Cannon Group PLC New

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Acumens Address Verify Show Attached Actions Navigate Report ...

Change Log Show Delete Entries Create Inventory...t-away/Pick...

Contact No.: CT000008 Assigned User ID:

Phone No.:

Email:

Contact: Mr. Andy Teal Status: Open

No. of Archived Versions: 0 CFDI Purpose:

Document Date: 1/27/2022 CFDI Relation:

Posting Date: 1/27/2022 WORK DESCRIPTION:

Acumens Address Verify

Ship-to Address Verified: Zip+4 Address Updated:

Lines Manage Line Order Fewer options

TYPE	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
Item	1001	Touring Bicycle	BLUE	2			PCS	223.00	ATLANTA, GA	
Item	1920-S	ANTWERP Conference Table	BLUE	1			PCS	647.80	ATLANTA, GA	FURNITURE

Subtotal Excl. Tax (USD): 1,093.80 Total Excl. Tax (USD): 1,093.80

Inv. Discount Amount Excl. Tax (USD): 0.00 Total Tax (USD): 38.87

Dynamics 365 Business Central

SALES HEADER: ORDER:1026 | WORK DATE: 1/27/2022

FIELD CAPTION	OLD VALUE	NEW VALUE
Document Type		Order
Sell-to Customer No.		10000
No.		1026
Bill-to Customer No.		10000
Name		The Cannon Group PLC New
Address		192 Market Square
City		Atlanta
Contact		Mr. Andy Teal
Ship-to Name		The Cannon Group PLC New
Ship-to Address		192 Market Square
Ship-to City		Atlanta
Ship-to Contact		Mr. Andy Teal
Order Date		01/27/22
Posting Date		01/27/22
Shipment Date		01/27/22
Posting Description		Order 1026
Payment Terms Code		1M(8D)
Due Date		02/27/22
Payment Discount %		2
Pmt. Discount Date		02/04/22
Shipment Method Code		EXW
Location Code		BLUE
Department Code		SALES
Customer Posting Group		DOMESTIC
Currency Factor		0
Prices Including Tax		No
Invoice Disc. Code		10000
Language Code		ENU
Salesperson Code		PS

Versions

CHANGE ON

05/21/24 03:19 AM SBC,BETTY Insert

On the lines, it shows history per line selected:

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1/27/2022

1026 · The Cannon Group PLC New

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Acumens Address Verify Show Attached Actions Navigate Report

Country/Region Code US Responsibility Center BIRMINGHAM

Contact No. CT000008 Assigned User ID

Phone No. Status Open

Email CFDI Purpose

Contact Mr. Andy Teal CFDI Relation

No. of Archived Versions 0 WORK DESCRIPTION

Document Date 1/27/2022

Posting Date 1/27/2022

Acumens Address Verify

Ship-to Address Verified Zip+4 Address Updated

TYPE	NO.	DESCRIPTION	CODE	QUANTITY	ORDER	QUANTITY	CODE	EXCL. TAX	CODE	CODE
Item	1001	Touring Bicycle	BLUE	2			PCS	223.00	ATLANTA, GA	
Item	1920-S	ANTWERP Conference Table	BLUE	1			PCS	647.80	ATLANTA, GA	FURNITURE

Subtotal Excl. Tax (USD) 1,093.80 Total Excl. Tax (USD) 1,093.80

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 38.87

Dynamics 365 Business Central			SALES LINE: ORDER,1026,20000 WORK DATE: 1/27/2022		
HSM History Lines			Manage		
FIELD CAPTION	OLD VALUE	NEW VALUE			
Document Type		Order			
Sell-to Customer No.		10000			
Document No.		1026			
Line No.		20000			
Type		Item			
No.		1920-S			
Location Code		BLUE			
Posting Group		RESALE			
Shipment Date		01/27/22			
Description		ANTWERP Conference Table			
Unit of Measure		Piece			
Quantity		0			
Outstanding Quantity		0			
Qty. to Invoice		0			
Qty. to Ship		0			
Unit Price		647.8			
Unit Cost (\$)		505.4			
Tax %		0			
Line Discount %		0			
Line Discount Amount		0			
Amount		0			
Amount Including Tax		0			
Allow Invoice Disc.		Yes			
Gross Weight		28.06			
Net Weight		24.4			
Units per Parcel		0			
Unit Volume		0.9			
Appl.-to Item Entry		0			
Department Code		SALES			

Versions

CHANGE ON

05/21/24 03:19 AM SBC\BETTY Modify

05/21/24 03:14 AM SBC\BETTY Insert

Dynamics 365 Business Central			SALES LINE: ORDER,1026,20000 WORK DATE: 1/27/2022		
HSM History Lines			Manage		
FIELD CAPTION	OLD VALUE	NEW VALUE			
Quantity	0	1			
Outstanding Quantity	0	1			
Qty. to Invoice	0	1			
Qty. to Ship	0	1			
Tax %	0	6.00031			
Amount	0	647.8			
Amount Including Tax	0	686.67			
Outstanding Amount	0	686.67			
Outstanding Amount (\$)	0	686.67			
Tax Base Amount	0	647.8			
Line Amount	0	647.8			
Prepmt. Line Amount	0	97.17			
Planned	Yes	No			
Quantity (Base)	0	1			
Outstanding Qty. (Base)	0	1			
Qty. to Invoice (Base)	0	1			
Qty. to Ship (Base)	0	1			

Versions

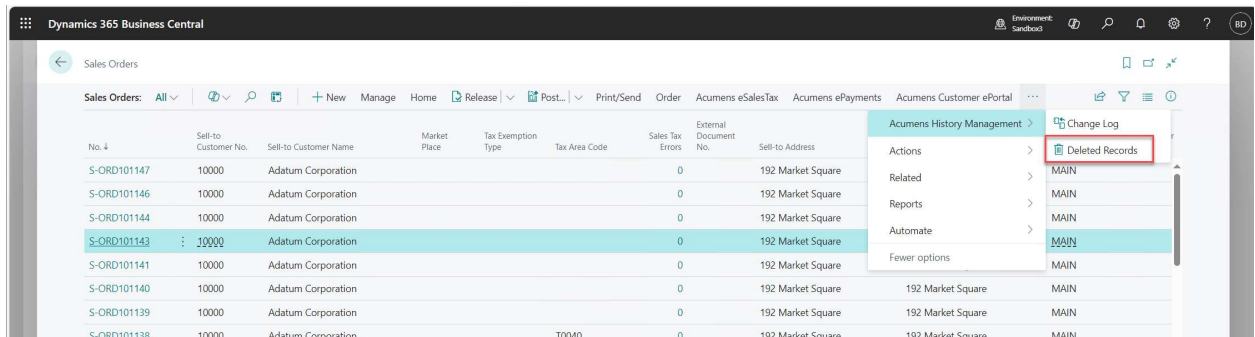
CHANGE ON

05/21/24 03:19 AM SBC\BETTY Modify

05/21/24 03:14 AM SBC\BETTY Insert

2.2. Deleted Records:

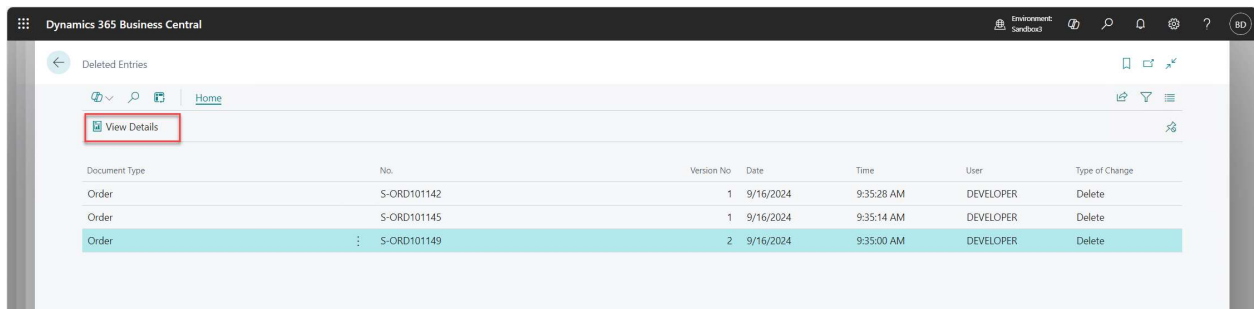
This action shows all deleted Sales Orders that have been manually deleted and not through posting. It can be accessed from the sales order card or sales orders list.



The screenshot shows the 'Sales Orders' list in Dynamics 365 Business Central. The 'Acumens History Management' menu is open, and the 'Deleted Records' option is highlighted. The table below shows the list of sales orders.

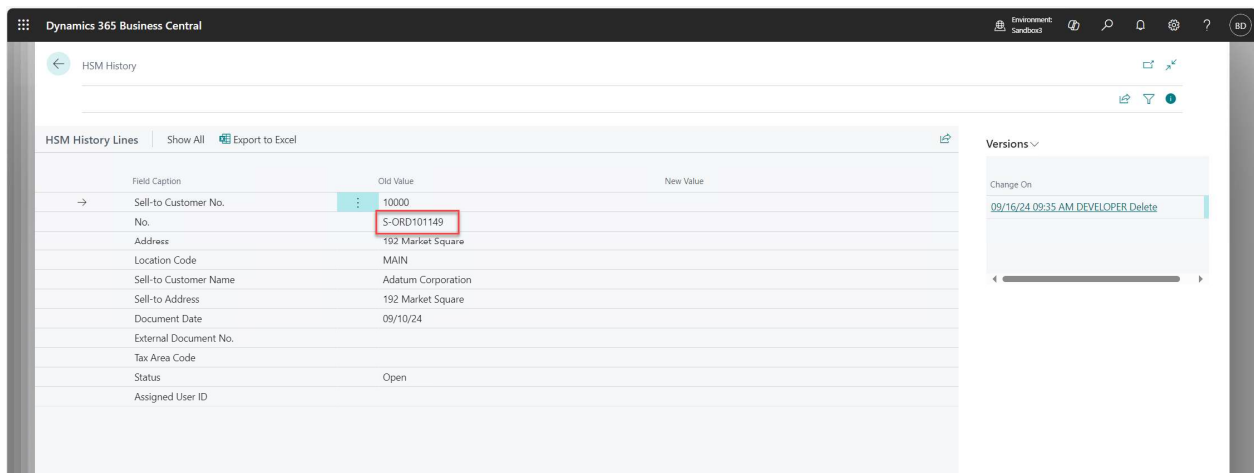
No.	Sell-to Customer No.	Sell-to Customer Name	Market Place	Tax Exemption Type	Tax Area Code	Sales Tax Errors	External Document No.	Sell-to Address
S-ORD101147	10000	Adatum Corporation				0		192 Market Square
S-ORD101146	10000	Adatum Corporation				0		192 Market Square
S-ORD101144	10000	Adatum Corporation				0		192 Market Square
S-ORD101143	10000	Adatum Corporation				0		192 Market Square
S-ORD101141	10000	Adatum Corporation				0		192 Market Square
S-ORD101140	10000	Adatum Corporation				0		192 Market Square
S-ORD101139	10000	Adatum Corporation				0		192 Market Square
S-ORD101138	10000	Adatum Corporation			T0040	0		192 Market Square

To access details of the deleted record, use “View Details” page action.



The screenshot shows the 'Deleted Entries' page in Dynamics 365 Business Central. The 'View Details' button is highlighted. The table below shows the list of deleted entries.

Document Type	No.	Version No.	Date	Time	User	Type of Change
Order	S-ORD101142	1	9/16/2024	9:35:28 AM	DEVELOPER	Delete
Order	S-ORD101145	1	9/16/2024	9:35:14 AM	DEVELOPER	Delete
Order	S-ORD101149	2	9/16/2024	9:35:00 AM	DEVELOPER	Delete



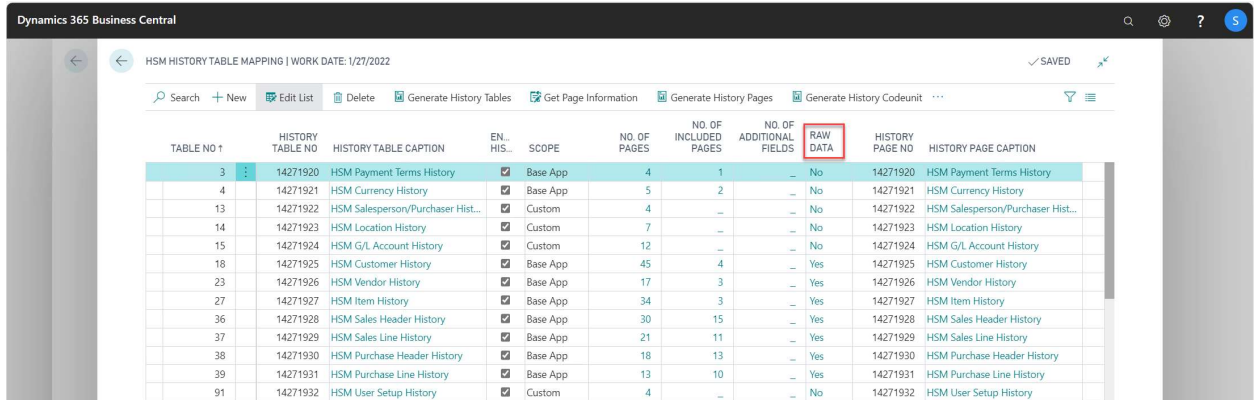
The screenshot shows the 'HSM History' page in Dynamics 365 Business Central. The 'View Details' button is highlighted. The table below shows the list of HSM history lines.

Field Caption	Old Value	New Value
Sell-to Customer No.	10000	S-ORD101149
No.		192 Market Square
Address		192 Market Square
Location Code		MAIN
Sell-to Customer Name		Adatum Corporation
Sell-to Address		192 Market Square
Document Date		09/10/24
External Document No.		
Tax Area Code		
Status		Open
Assigned User ID		

3. Raw Data Access

This gives access to the table raw data.

The field below shows if the table has data.



Dynamics 365 Business Central

HSM HISTORY TABLE MAPPING | WORK DATE: 1/27/2022

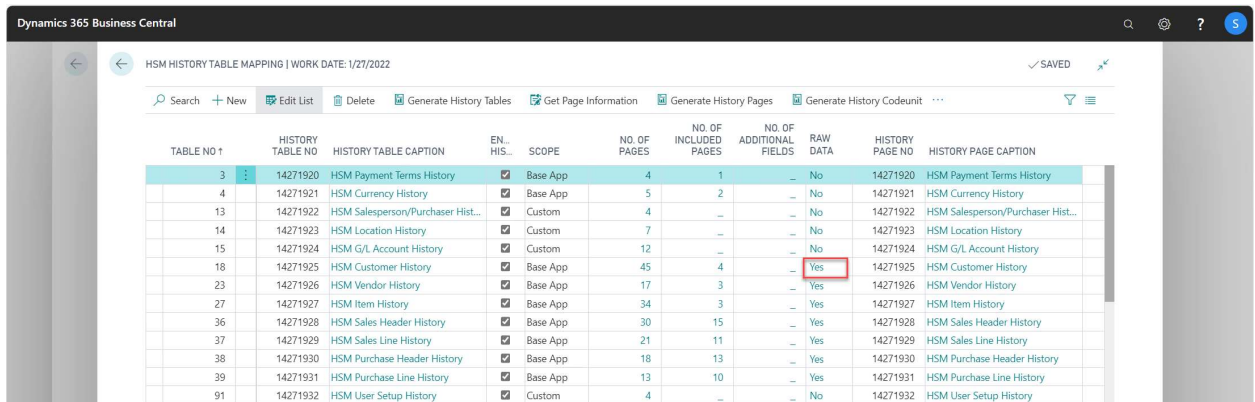
✓ SAVED

Search + New Edit List Delete Generate History Tables Get Page Information Generate History Pages Generate History Codeunit

TABLE NO ↑	HISTORY TABLE NO	HISTORY TABLE CAPTION	ENL. HIS...	SCOPE	NO. OF PAGES	NO. OF INCLUDED PAGES	NO. OF ADDITIONAL FIELDS	RAW DATA	HISTORY PAGE NO	HISTORY PAGE CAPTION
3	14271920	HSM Payment Terms History	✓	Base App	4	1	—	No	14271920	HSM Payment Terms History
4	14271921	HSM Currency History	✓	Base App	5	2	—	No	14271921	HSM Currency History
13	14271922	HSM Salesperson/Purchaser Hist...	✓	Custom	4	—	—	No	14271922	HSM Salesperson/Purchaser Hist...
14	14271923	HSM Location History	✓	Custom	7	—	—	No	14271923	HSM Location History
15	14271924	HSM G/L Account History	✓	Custom	12	—	—	No	14271924	HSM G/L Account History
18	14271925	HSM Customer History	✓	Base App	45	4	—	Yes	14271925	HSM Customer History
23	14271926	HSM Vendor History	✓	Base App	17	3	—	Yes	14271926	HSM Vendor History
27	14271927	HSM Item History	✓	Base App	34	3	—	Yes	14271927	HSM Item History
36	14271928	HSM Sales Header History	✓	Base App	30	15	—	Yes	14271928	HSM Sales Header History
37	14271929	HSM Sales Line History	✓	Base App	21	11	—	Yes	14271929	HSM Sales Line History
38	14271930	HSM Purchase Header History	✓	Base App	18	13	—	Yes	14271930	HSM Purchase Header History
39	14271931	HSM Purchase Line History	✓	Base App	13	10	—	Yes	14271931	HSM Purchase Line History
91	14271932	HSM User Setup History	✓	Custom	4	—	—	No	14271932	HSM User Setup History

To access Data, drilldown on the field.

The corresponding history page will open. No modifications can be made on this page.



Dynamics 365 Business Central

HSM HISTORY TABLE MAPPING | WORK DATE: 1/27/2022

✓ SAVED

Search + New Edit List Delete Generate History Tables Get Page Information Generate History Pages Generate History Codeunit

TABLE NO ↑	HISTORY TABLE NO	HISTORY TABLE CAPTION	ENL. HIS...	SCOPE	NO. OF PAGES	NO. OF INCLUDED PAGES	NO. OF ADDITIONAL FIELDS	RAW DATA	HISTORY PAGE NO	HISTORY PAGE CAPTION
3	14271920	HSM Payment Terms History	✓	Base App	4	1	—	No	14271920	HSM Payment Terms History
4	14271921	HSM Currency History	✓	Base App	5	2	—	No	14271921	HSM Currency History
13	14271922	HSM Salesperson/Purchaser Hist...	✓	Custom	4	—	—	No	14271922	HSM Salesperson/Purchaser Hist...
14	14271923	HSM Location History	✓	Custom	7	—	—	No	14271923	HSM Location History
15	14271924	HSM G/L Account History	✓	Custom	12	—	—	No	14271924	HSM G/L Account History
18	14271925	HSM Customer History	✓	Base App	45	4	—	Yes	14271925	HSM Customer History
23	14271926	HSM Vendor History	✓	Base App	17	3	—	Yes	14271926	HSM Vendor History
27	14271927	HSM Item History	✓	Base App	34	3	—	Yes	14271927	HSM Item History
36	14271928	HSM Sales Header History	✓	Base App	30	15	—	Yes	14271928	HSM Sales Header History
37	14271929	HSM Sales Line History	✓	Base App	21	11	—	Yes	14271929	HSM Sales Line History
38	14271930	HSM Purchase Header History	✓	Base App	18	13	—	Yes	14271930	HSM Purchase Header History
39	14271931	HSM Purchase Line History	✓	Base App	13	10	—	Yes	14271931	HSM Purchase Line History
91	14271932	HSM User Setup History	✓	Custom	4	—	—	No	14271932	HSM User Setup History

Dynamics 365 Business Central

Search

Show Attached

Open in Excel

VIEW - HSM CUSTOMER HISTORY

TABLE NO 1

	TABLE NO 1	TABLE NO 1	TABLE NO 1	TABLE NO 1	TABLE NO 1	TABLE NO 1
	TABLE NO 1	TABLE NO 1	TABLE NO 1	TABLE NO 1	TABLE NO 1	TABLE NO 1
3	14	NO. 1	NAME	SEARCH NAME	NAME 2	ADDRESS
4	14	C00440	new change	NEW CHAN...		ADDRESS 2
13	14	C00450	cust test	CUST TEST		
14	14	C00460	Test History Management	TEST HISTO...		
15	14	C00460	Test History Management	TEST HISTO...		
18	14	C00460	Test History Management	TEST HISTO...		
23	14	TEST0002	Test Customer		On Insert False	
27	14	TEST0003	Test Customer 3		On Insert True	
36	14	TEST0004	Test Customer 4		On Insert False	
37	14	TEST0004	Test Customer 4		On Insert False	
38	14	TEST0004	Test Customer 4		On Insert False	
39	14	TEST0005	Test Customer 5		On Insert True	
91	14	TEST0006	Test Customer 6		On Insert False	
97	14	TEST0007	Test Customer 7		On Insert True	
98	14	TEST0008	Test Customer 8		On Insert False	
110	14	TEST001	Test Insert (FALSE)			
111	14	TEST002	Test Insert (TRUE)			
112	14	TEST01	Test Insert			
113	14	TEST01	Test Insert			
114	14	TEST01	Test Insert (FALSE)			
115	14	TEST02	Test Insert (TRUE)			
120	14	TEST02	Test Insert (TRUE)			
121	14	TEST02	Test Insert (TRUE)			
122	14	TEST02	Test Insert (TRUE)			
123	14	TEST02	Test Insert (TRUE)			
124	14	TEST02	Test Insert (TRUE)			
125	14	TEST02	Test Insert (TRUE)			
156	14	TEST1002	Test Insert (TRUE)			
167	14					
201	14					
222	14					
224	14					

Close