

Acumens Professional Services Management Functionality

Version: Business Central BC24

Prepared & developed by
SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	10-11-2024		Document Prepared
2.0	11-18-2024	Role Centers Work Orders Assigning Resources DocuSign Approval process	<ul style="list-style-type: none">- Created 3 Role Centers (End User, Project Manager and Professional Service Manager)- Added chargeable Boolean in the Work Order and its application.- Added Work Type and Project Role while assigning resources.- Added DocuSign Approval process (Send, View and Cancel).

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1. ROLE CENTER

Acumens Professional Service Management provides three role centers with varying activities and cues. The Acumens APS Professional Service Manager has full visibility, while the Acumens APS Project Manager has no access to invoices. The Acumens APS Developer can only see the tasks they are working on.

CRONUS USA, Inc.

Work Orders Journals Posted Documents All Reports

APS Work Orders Customers Resources Time Sheets Project Journals

Actions

Project Create Sales Invoice Project WIP Cockpit Setup Reports

APS Activities

Work Orders

New5

Pending2

Approved1

In Process2

Completed0

Invoicing

Upcoming Invoices0

Invoices Due - ... Created17

Posted Documents

Posted Sales Invoices1

Other Activities

Work in Process

WIP Not Posted1

Completed - ... Calculated0

Resources

Resources7

Self-Service

Current Time Sheet

Open My Curre... Sheet

Time Sheets

New Time Sheets0

Time Sheets In progress4

Pending Time Sheets

Submitted Time Sheets1

Rejected Time Sheets0

Approved Time Sheets13

Approvals

Time Sheets to Approve1

Insights

My Projects

Project No. ↑	Description	Status	Bill-to Name	Percent Completed	Percent Invoiced	Exclude from Business Chart
J00077	Change Work Order	Open	New Concepts Furniture	1.41	0.00	<input type="checkbox"/>
J00078	New Project - Task Level	Open	New Concepts Furniture	5.27	0.00	<input type="checkbox"/>

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2. SETUPS

2.1. Acumens Professional Services Setup

Provide a central point for various system setups, such as numbering for Work Orders and Work Order Task Templates. Additionally, you can select the total resources used by the project manager to post the budget and an overage percentage.

Work Date: 1/23/2026

✓ Saved

Acumens Professional Services Setup

HOME

Actions

Fewer options

General

Resource (Total)

TOTAL

Set Ticket No. Mandat...

Overage %

20.00

Global Test Mode

Numbering

Work Order Nos

WO

WO Task Template Nos

WOT

Billing Texts

Billing Message 1

Posted Invoice

e-Mail questions about billing to
billing@cronususa.com

Billing Message 2

Message 2

Check our products and services
at www.cronususa.com

Payment Remittance Information

Payment Information

Preferred Pay By

WIRE VIA BANK ACCOUNT

Preferred Payment M...

US Bank

Alternate Pay By

REMIT CHECK TO

Alternate Payment M...

Send Check

Remittance Address

Remittance Address I...

CRONUS Systems USA, Inc.
75 Remittance Dr., Suite 6963
Chicago, IL 60675-6963,

Terms and conditions

2.2. Work Order Task Template

The Work Order Task Template is a predefined framework used to accelerate the creation of work order tasks.

←

...S WO Task Template | Work Date: 1/23/2026

+

✓ Saved

WOT00002 · Change Work Order

General

No.

WOT00002

Description

Change Work Order

Lines

New Line

Delete Line

WO Task Code ↑

WO Task Description

→	100-ANALYSIS	<div>⋮</div>	Discovery and Analysis
	200-DESIGN		Solution Design
	300-DEV		Development
	400-TEST		Testing
	500-DOCUMENT		Documentation
	600-TRAIN		Training
	700-DEPLOY		Deployment
	800-PM		Project Management

2.3. Work Types

Define the nature of the work to be done for Work Order tasks.

←

Work Types | Work Date: 1/23/2026

✓ Saved

+

 New

Edit List

Delete

Code ↑

Description

Unit of Measure Code

	ASSEMBLY		Assembly	
	PACKAGING		Packaging	
	DESIGN		Design	
→	CONFIG	<div>⋮</div>	Configuration	

2.4. Project Role

Refers to the specific position or function that an individual or resource plays within a project.

APS Project Roles | Work Date: 1/23/2026

✓ Saved

+ New

Edit List

Delete

	Code ↑		Description
→	FACILITATOR	⋮	Project Facilitator
	LEAD		Project Leader
	MANAGER		Project Manager
	MONITOR		Project Monitor

3. WORK ORDER AND TASK MANAGEMENT

The Project Manager can create work orders to outline the services to be performed, including details like tasks, timelines, and resources needed.

3.1. Work Order Header

The job is linked to the work order.

←

APS Work Order | Work Date: 1/23/2026

+

✓ Saved

WO0011 · Implement Business Central (Task Level)

HOME

Release

General

No.	WO0011	Overtime %	20.00
Description	Implement Business Central (Tas...	Maximum Billing	480.00
Job No.	100090	Budget Tracking Level ...	Task Level
Due Date	11/18/2024	Blocked	
Customer PO No.		Work Order Status	In Process
Main Work Order No. ...	WO0011	Status	Released
Main Work Order Task... ·		Print Ticket Details	<div></div>
Work Order Template ... ·	WOT00001	Ticket No. Mandatory ...	<div></div>
Estimated Time	400.00	Enforce Budget by Re... ..	<div></div>

3.2. Work Order Task

Work Order tasks become part of the Job tasks after releasing the Work Order. They are linked to the resources, budget and estimated time.

Note:

- Chargeable task(s) must be marked accordingly.

Tasks Manage Line										
New Line Delete Line										
Line No. ↑	Job No.	WO Task Code ↑	WO Task Description	WO Task Status	Chargeable	Resources Assigned	Estimated Time	Maximum Billing	Project Manager	Blocked
100	J00091	000-PM	Project Management	Not Started	✓	3	100.00	120.00	SBC\WESLEY	
200	J00091	010-DESIGN	Design	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
300	J00091	020-INSTALL	Install ZetaDocs and Jets	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
400	J00091	030-DB CONFIG	Database Configuration	Not Started	✓	3	200.00	240.00	SBC\WESLEY	
500	J00091	040-DEV	Development	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
600	J00091	050-TEST	Testing	Not Started	✓	3	50.00	60.00	SBC\WESLEY	
700	J00091	060-DATA CONV	Data Conversion	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
800	J00091	070-QA	Quality Assurance	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
900	J00091	080-TRAIN	Training	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1000	J00091	090-SECURITY	Security and Role Config	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1100	J00091	100-UAT	User Acceptance Testing	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1200	J00091	110-FINAL DC	Final Data Conversion	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1300	J00091	120-GO LIVE	Go Live	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1400	J00091	130-WMS	Warehouse Management	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1500	J00091	140-LS RETAIL	LS Retail	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1600	J00091	150-ADDL NAV	Additional NAV Granules	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1700	J00091	160-AFTER LIVE	After Live Actions	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1800	J00091	170-SUPPORT	Support	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
1900	J00091	175-WO	Work Orders	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
2000	J00091	180-TRAVEL	Travel	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
2100	J00091	190-NB	Non-Billable	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
2200	J00091	200-NBT	Non-Billable Travel	Not Started	✓	3	0.00	0.00	SBC\WESLEY	
2300	J00091	999-EXPENSES	Expenses	Not Started	✓	3	0.00	0.00	SBC\WESLEY	

3.3. Assign Resources

This action, on the header, assigns resources to all the Work Order tasks.

←

APS Work Order | Work Date: 1/23/2026

+

✓ Saved

WO0011 · Implement Business Central (Task Level)

HOME

Release

Assign Resources

Documents

No.

WO0011

Overrage %

20.00

Description

Implement Business Central (Task

Maximum Billing

0.00

Job No.

J00090

Budget Tracking Level ...

Task Level

Due Date

11/18/2024

Blocked

Customer PO No.

Work Order Status

New

The Work Order Resources page is as shown below.

APS Assigned Work Order Resources Work Date: 1/23/2026						
New Edit List Delete						
Resource No. ↑	Work Type	Assigned Hrs	Project Role	Role Description		
KATHERINE	ASSEMBLY	0.00	LEAD	Project Leader		
LIFT	CONFIG	0.00	FACILITATOR	Project Facilitator		
→ LINA	DESIGN	0.00	MANAGER	Project Manager		

Resources can also be assigned to each task, as shown below.

Tasks Manage <u>Line</u>										
Assign Resources										
Line No. ↑	Job No.	WO Task Code ↑	WO Task Description	WO Task Status	Chargea...	Resources Assigned	Estimated Time	Maximum Billing	Project Manager	Blocked
→ 100	J00090	000-PM	Project Management	Not Started	<input type="checkbox"/>	3	0.00	0.00	SBC\WESLEY	
200	J00090	010-DESIGN	Design	Not Started	<input type="checkbox"/>	3	0.00	0.00	SBC\WESLEY	
300	J00090	020-INSTALL	Install ZetaDocs and Jets	Not Started	<input type="checkbox"/>	3	0.00	0.00	SBC\WESLEY	

Resources per task will be added as follows.

← APS Assigned WO Task Resources Work Date: 1/23/2026							✓ Saved			
		+ New	Edit List	Delete						
Resource No. ↑	Work Type	Assigned Hrs	Role Code	Role Description		Actual Time				
KATHERINE	ASSEMBLY	0.00	LEAD	Project Leader		0.00				
LIFT	CONFIG	0.00	FACILITATOR	Project Facilitator		0.00				
LINA	DESIGN	0.00	MANAGER	Project Manager		0.00				
→ MARTY	PACKAGING	0.00	MONITOR	Project Monitor		0.00				

The result for the affected Work Order task line will be as follows.

Tasks Manage <u>Line</u>										
Assign Resources										
Line No. ↑	Job No.	WO Task Code ↑	WO Task Description	WO Task Status	Chargea...	Resources Assigned	Estimated Time	Maximum Billing	Project Manager	Blocked
→ 100	J00090	000-PM	Project Management	Not Started	<input type="checkbox"/>	4	0.00	0.00	SBC\WESLEY	
200	J00090	010-DESIGN	Design	Not Started	<input type="checkbox"/>	3	0.00	0.00	SBC\WESLEY	
300	J00090	020-INSTALL	Install ZetaDocs and Jets	Not Started	<input type="checkbox"/>	3	0.00	0.00	SBC\WESLEY	

3.5. Work Order Documents

Project managers can upload relevant documents, contracts and specifications to Work Orders to Azure Storage for easy access and refence throughout the project.

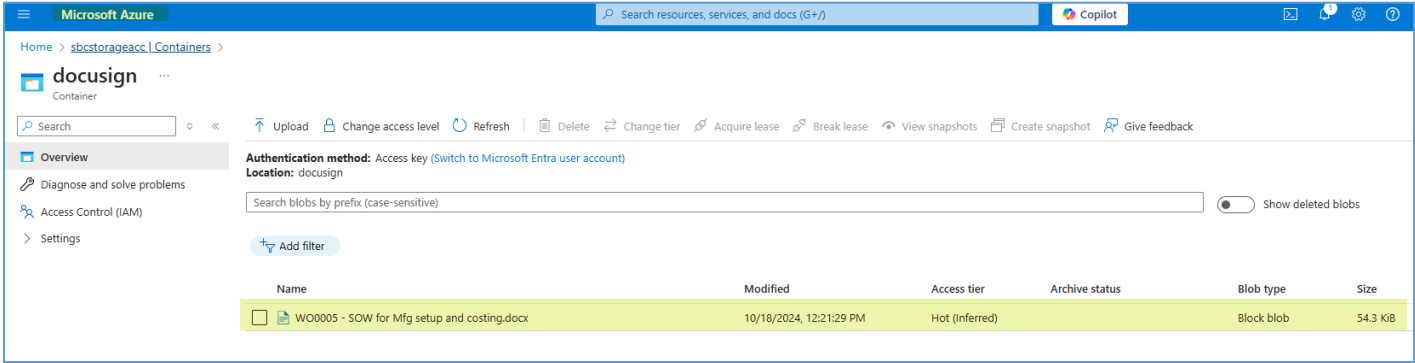
3.5.1. Action “Upload to Azure”

This action uploads the documents to Azure Storage.

←

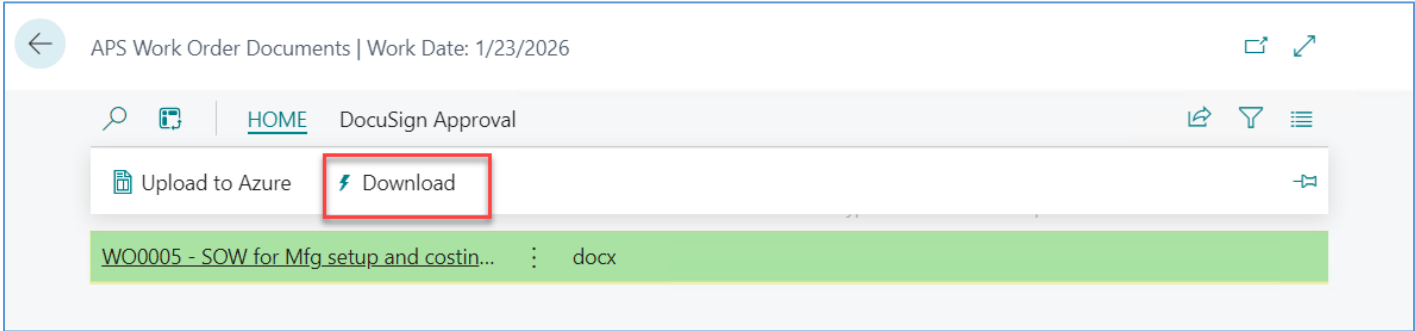
APS Work Order Documents | Work Date: 1/23/2026

Uploaded document in Azure Storage.



3.5.2. Action “Download”

This action downloads the selected document from Azure Storage.

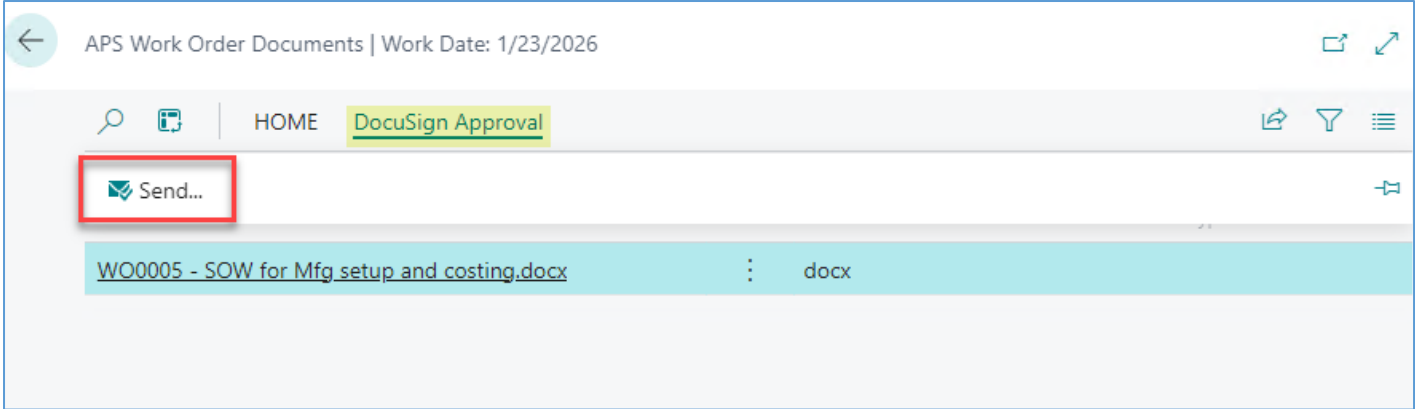


3.6. Work Order approval via DocuSign

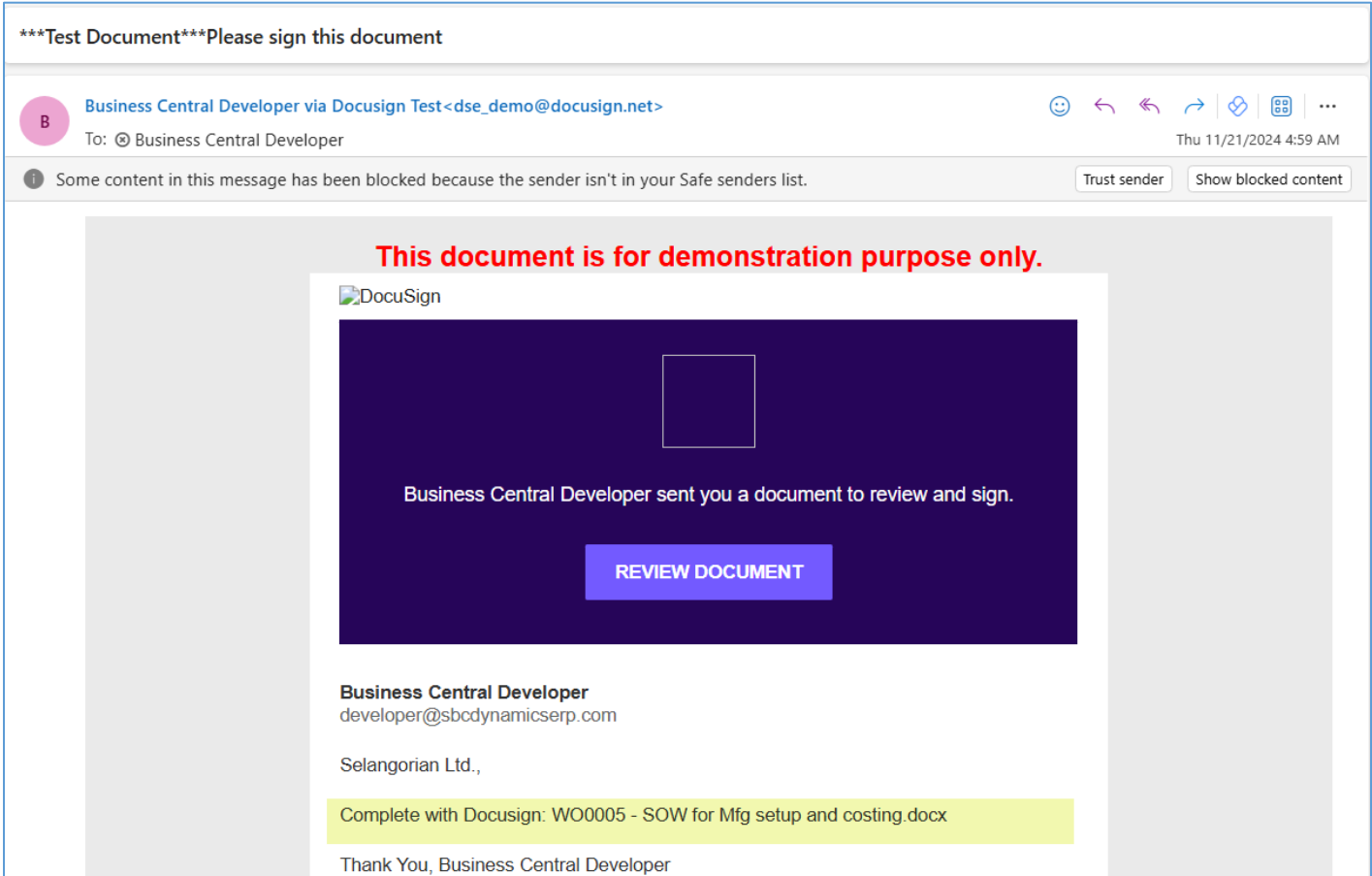
This process enables Project Managers to electronically send documents to customers for signature via DocuSign.

3.6.1. Send document for approval via DocuSign

The “Send...” action under DocuSign Approval group sends the uploaded document for approval.

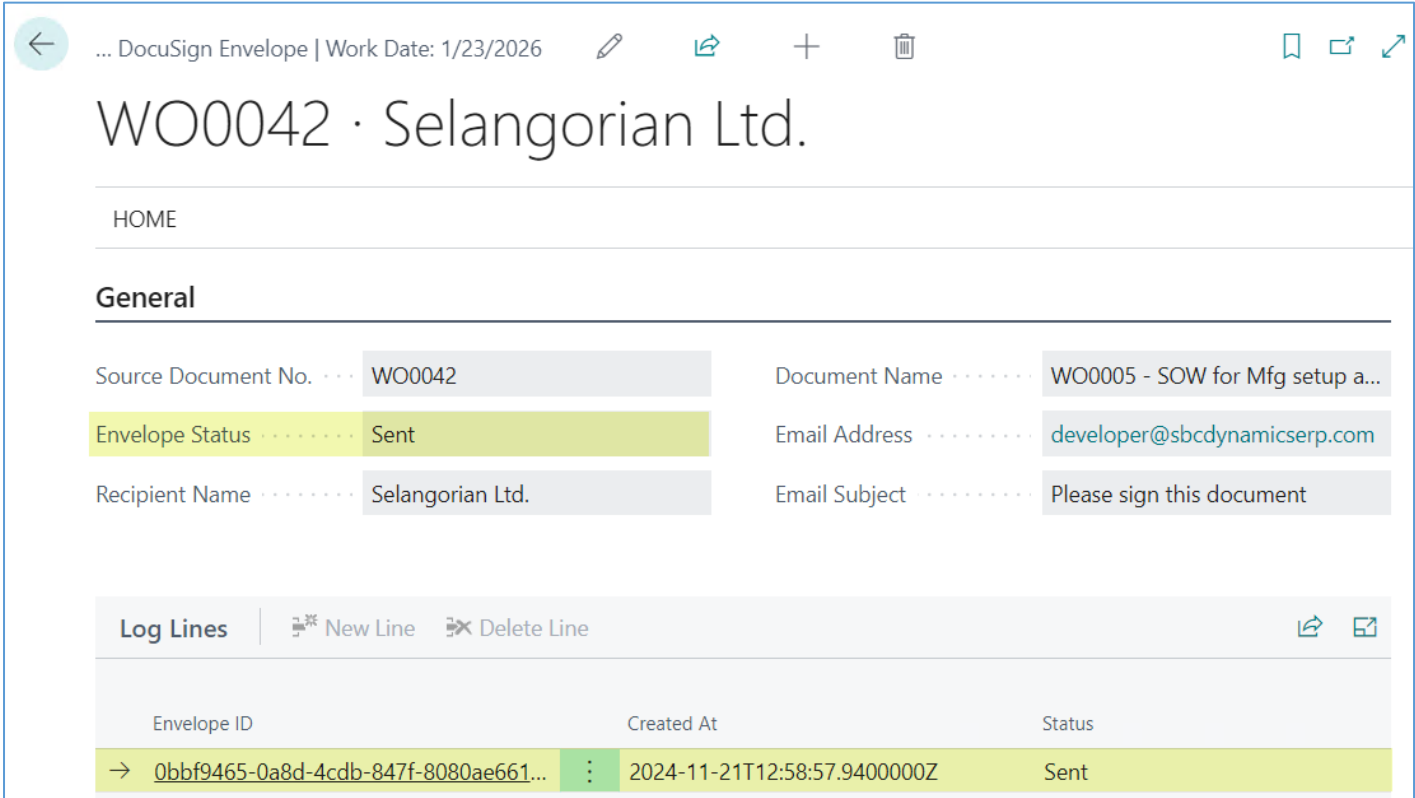


The customer will receive an email, as shown below, requesting their signature.



3.6.2. View the envelope status

The Project Manager can view the envelope status details in Business Central.



3.6.3. Cancel the document approval process.
The Project Manager can cancel the document approval process.

←

... DocuSign Envelope | Work Date: 1/23/2026

+

🔖

📧

WO0042 · Selangorian Ltd.

HOME

✕ Void Envelope

↻ Check Status

Source Document No. ··· WO0042

Document Name ····· WO0005 - SOW for Mfg setup a...

Envelope Status ····· Sent

Email Address ····· developer@sbcdynamicserp.com

Recipient Name ····· Selangorian Ltd.

Email Subject ····· Please sign this document

Log Lines >

3.6.4. Approve the document via DocuSign.
The customer can approve the document through DocuSign, and a notification will be sent to the Project Manager.

Approval Request for Work Order #WO00006

BD

Business Central Developer

📧

To: 📧 Business Central Developer

Dear Business Central Developer,

Please note that Work Order Number WO00006 has been approved.

Regards CRONUS USA, Inc.

↩ Reply

➡ Forward

😊

↩ Reply

↩ Reply all

➡ Forward

⋮

Mon 11/04/2024 8:22 AM

3.7. Release the Work Order

The Work Order is released using the “Release” action, which then posts the budget and Work Order task to the Job.

←

APS Work Order | Work Date: 1/23/2026

+

✓ Saved

WO0011 · Implement Business Central (Task Level)

HOME

Release

Release

Reopen

No.

WO0011

Overrage %

20.00

Description

Implement Business Central (Tas...

Maximum Billing

480.00

Job No.

J00090

Budget Tracking Level ...

Task Level

Due Date

11/18/2024

Blocked

Customer PO No.

Work Order Status

Approved

3.8. Reopen the Work Order

The Work Order is reopened using the “Reopen” action.

←

APS Work Order | Work Date: 1/23/2026

+

✓ Saved

WO0011 · Implement Business Central (Task Level)

HOME

Release

Release

Reopen

No.

WO0011

Overrage %

20.00

Description

Implement Business Central (Tas...

Maximum Billing

480.00

Job No.

J00090

Budget Tracking Level ...

Task Level

Due Date

11/18/2024

Blocked

Customer PO No.

Work Order Status

Approved

4. TIME SHEET MANAGEMENT

Professionals can log working hours and expenses incurred against each work order, aiding in accurate billing and project costing.

4.1. Create Time Sheet

Resources can record and submit their usage through the time sheet. A project Journal will be used to post the Time Sheet.

Note:

- Ensure that the APS Work Order No., APS WO Task No., and APS Ticket No. are populated.

Time Sheet | Work Date: 1/23/2026

October 14, 2024 (Week 42)

Home

Prepare

Reopen

Submit

Comments

General

Resource No. KATHERINE

Lines

Manage

Line

New Line

Delete Line


Type	Status	Description	Project No.	Project Task No.	APS Work Order No.	APS WO Task No.	APS Ticket No.	Cause of Absence Code	Cha...	Work Type Code	Service Order No.	14 Mon	15 Tue	16 Wed	17 Thu
Project	Approved	Project Management	J00085	000-PM	WO0005	000-PM	TK0003					6	7	8	5
Project	Approved	ABC - New Work Order Impleme...	J00086	WO0006	WO0006	000-PM	TK0004					5	6	7	7
Project	Approved	Work Orders	J00085	175-WO	WO0007	100-ANALYSIS	TK0005					4	7	6	4

5. REPORT MANAGEMENT

Work Orders provide valuable data that can be analyzed to gauge project performance, resource utilization, and financial metrics. This data helps in making informed decisions for future projects.

5.1. Posted Sales Invoice Report - Version 1

In this case, the Job Number is printed in both the header and the line. Additionally, the Work Order Number and the Work Order Task Number are printed in the line.



CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA
Phone No. +1 425 555 0100

INVOICE

Page 1 of 1

Invoice No.
103049

Customer PO No.

Bill To:
New Concepts Furniture
Ms. Tammy L. McDonald
705 West Peachtree Street
Atlanta, GA 31772
USA

Alternate Payment Method : See footer for details
Preferred Payment Method : WIRE via Bank Account
Bank Name : World Wide Bank
Account Name :
ABA/Routing No. : 99-99-999
SWIFT Code :
Bank Account No. : 99-99-888

Ship To:
Spotsmeyer's Furnishings
Mr. Mike Nash
612 South Sunset Drive
Miami, FL 37125
USA

Project	Document Date:	Payment Terms	Customer Ref. 1
	10/25/2024	Net 14 days	Ref -001
Department	Due Date	Job No.	Customer Ref. 2
Sales	11/8/2024	J00090	Ref -002

Item/Description	Service Date	Job No.	Work Order No.	WO Task No.	Unit	Quantity	Unit Price	Line Amount
KATHERINE Project Management	10/25/2024	J00090	WO0011	000-PM	Hour	8	19.30	154.40

Actual Task Number

Remit To :
CRONUS Systems USA, Inc.
75 Remittance Dr., Suite 6963
Chicago, IL 60675-6963,
USA

Standard terms and conditions apply

Subtotal: 154.40
Sales Tax: 0.00
Total USD: 154.40
Payments & Credits: 0.00
Amount Due USD: 154.40

Footer


Note:

- Ticket Number can also be printed in place of the task number depending on the setup.

5.2. Posted Sales Invoice Report - Version 2

In this case, the Job Number is printed only in the header. The Work Order Number, Work Order Task Number, and Ticket Number are printed in the line.

Printout will be as follows:

	CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, GA 31772 USA Phone No. +1 425 555 0100	INVOICE	Page 1 of 1					
Bill To: New Concepts Furniture Ms. Tammy L. McDonald 705 West Peachtree Street Atlanta, GA 31772 USA	Alternate Payment Method : See footer for details Preferred Payment Method : WIRE via Bank Account Bank Name : World Wide Bank Account Name : ABA/Routing No. : 99-99-999 SWIFT Code : Bank Account No. : 99-99-888	Invoice No. 103050 Customer PO No.	Ship To: Spotsmeyer's Furnishings Mr. Mike Nash 612 South Sunset Drive Miami, FL 37125 USA					
Project Department Sales	Document Date: 10/25/2024 Due Date 11/8/2024	Payment Terms Net 14 days Job No. J00091	Customer Ref. 1 Ref 1 Customer Ref. 2 Ref 2					
Item/Description	Service Date	Work Order No.	WO Task No.	Ticket No.	Unit	Quantity	Unit Price	Line Amount
KATHERINE Implement Business Central (Work Order)	10/25/2024	WO0012	000-PM	TK-0006	Hour	7	19.30	135.10
Remit To : CRONUS Systems USA, Inc. 75 Remittance Dr., Suite 6963 Chicago, IL 60675-6963, USA					Standard terms and conditions apply			
					Subtotal: 135.10 Sales Tax: 0.00 Total USD: 135.10 Payments & Credits: 0.00 Amount Due USD: 135.10			

Footer