

Tips & Tricks for New Users

Jessica Gadbois, Eric Moreau
Partner Enablement | Acumatica

Acumatica
Summit 2019

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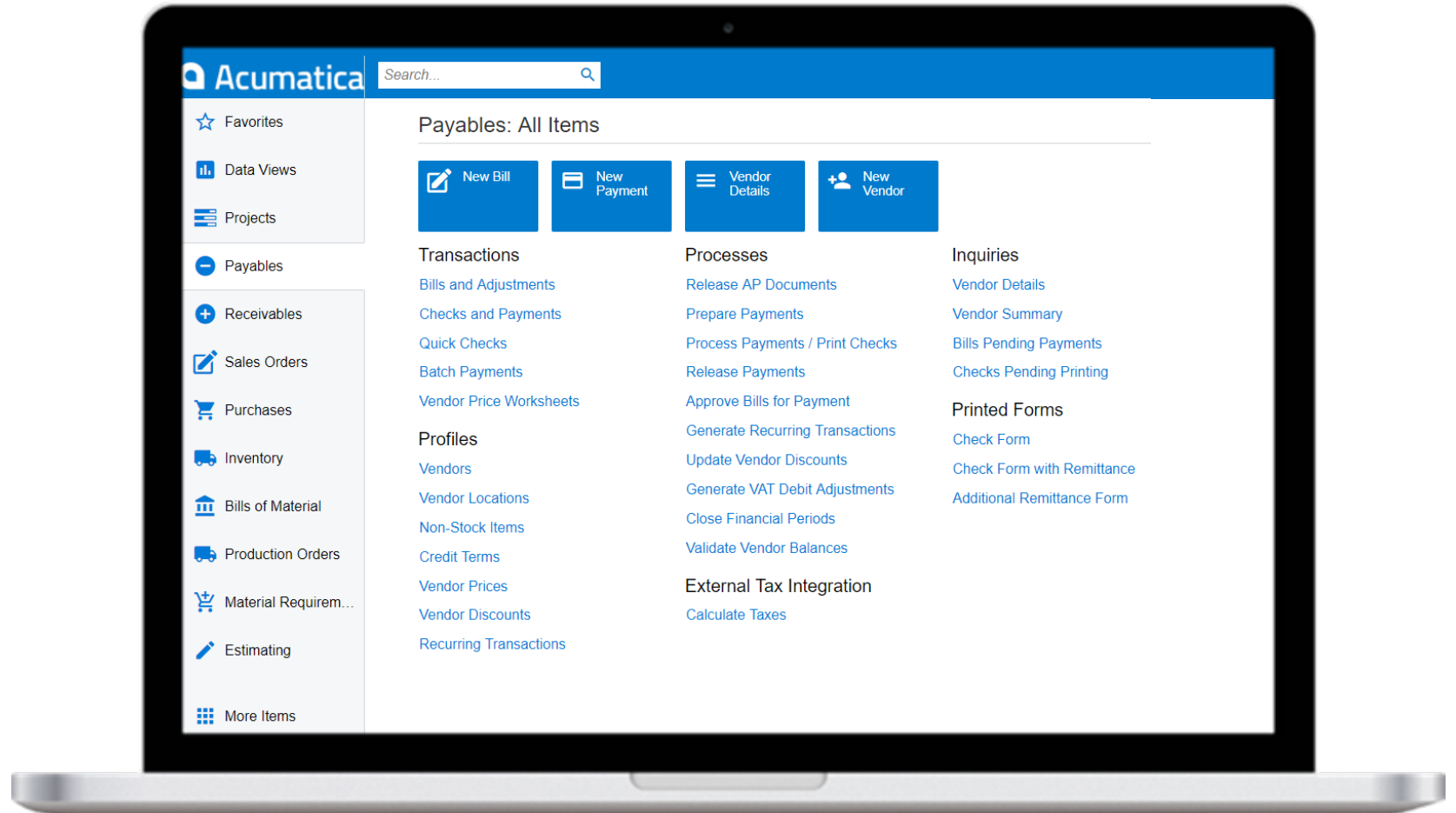
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- Introductions
- Top Tips & Tricks for New Acumatica Users
- Help Resources

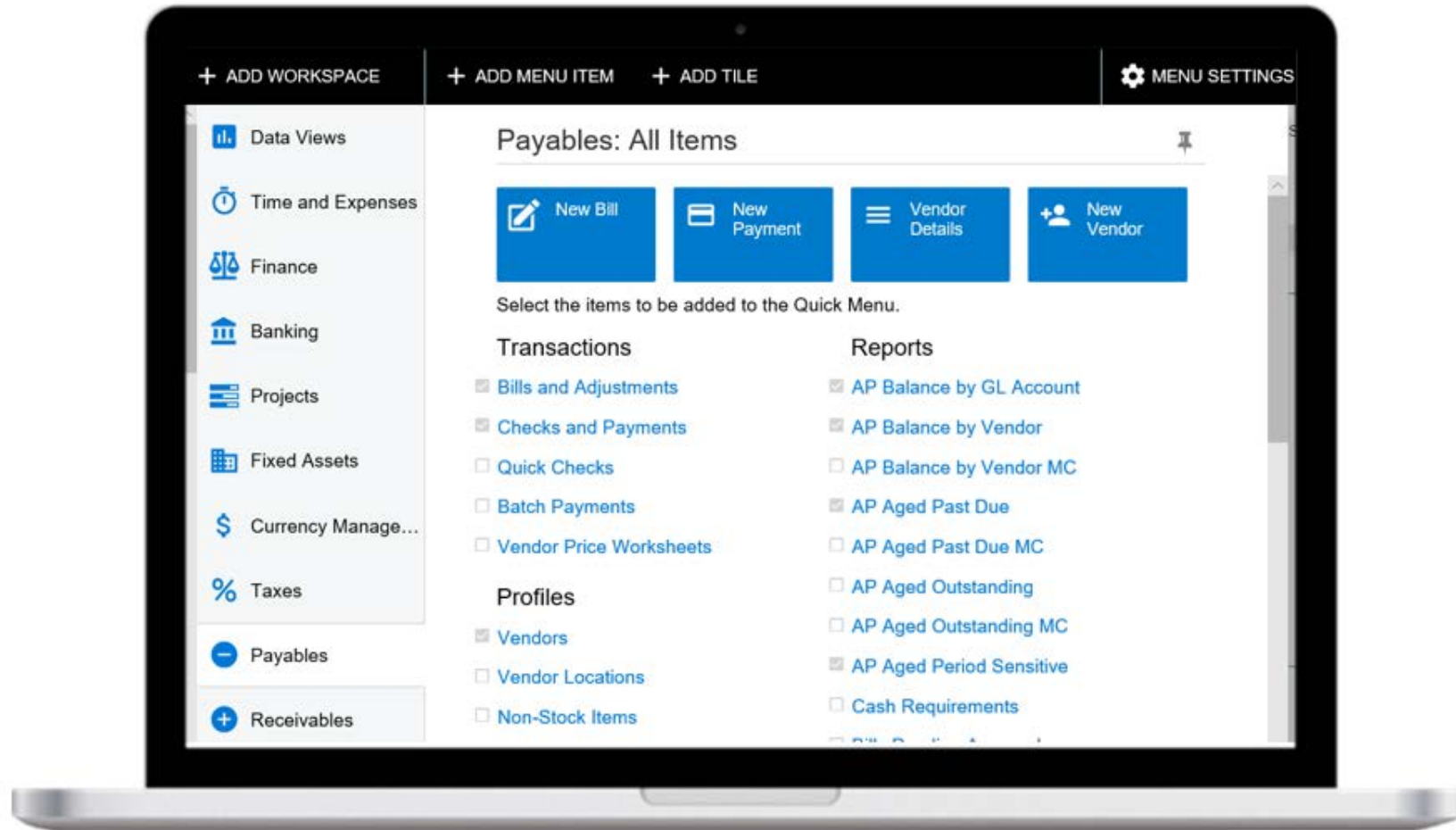
User interface review

- Search
- Workspaces
- Pin/unpin
- Quick Menu/Full Menu
- Tiles
- Favorites



Adding menu items to workspaces

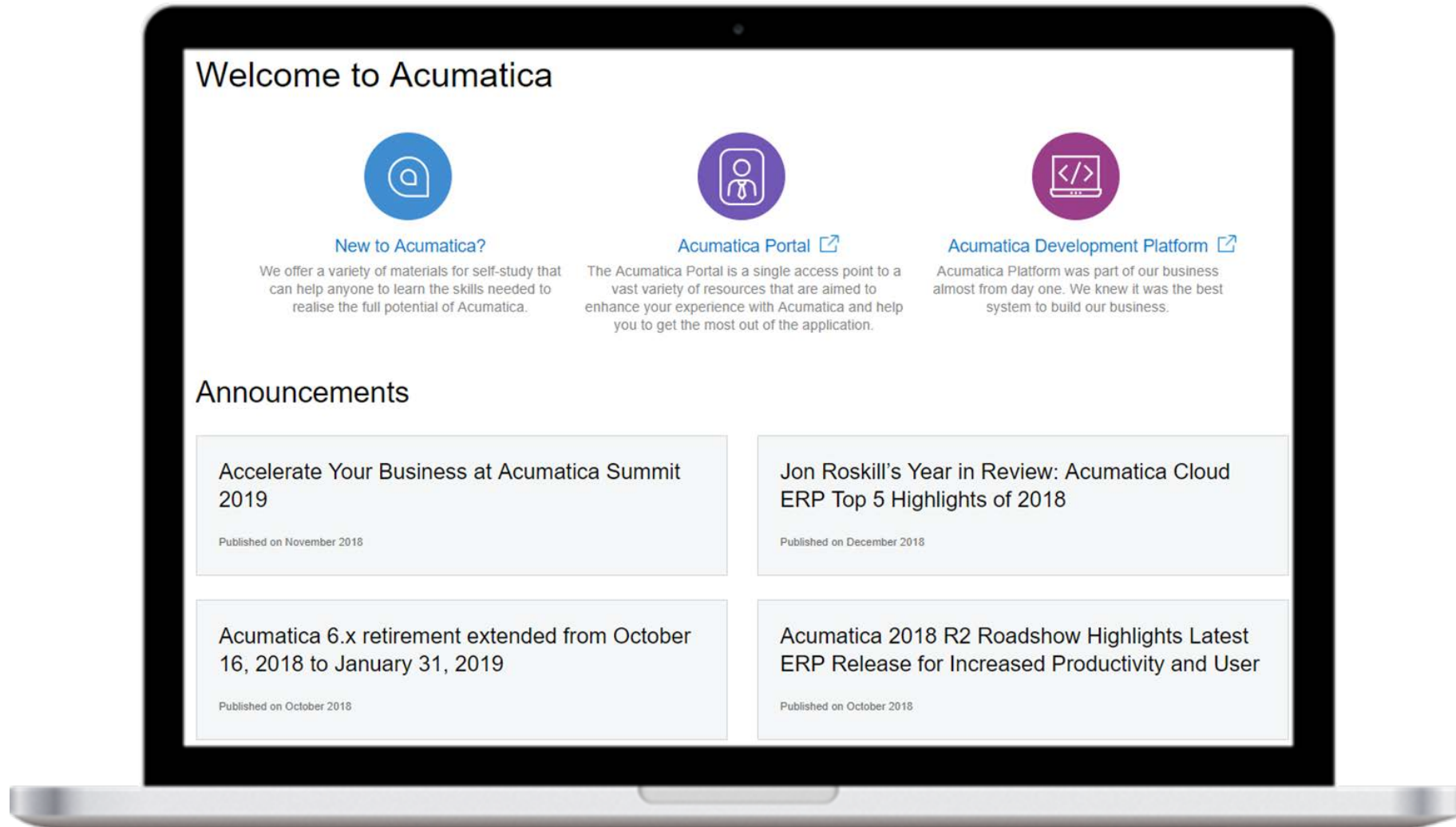
Personalize your Acumatica experience



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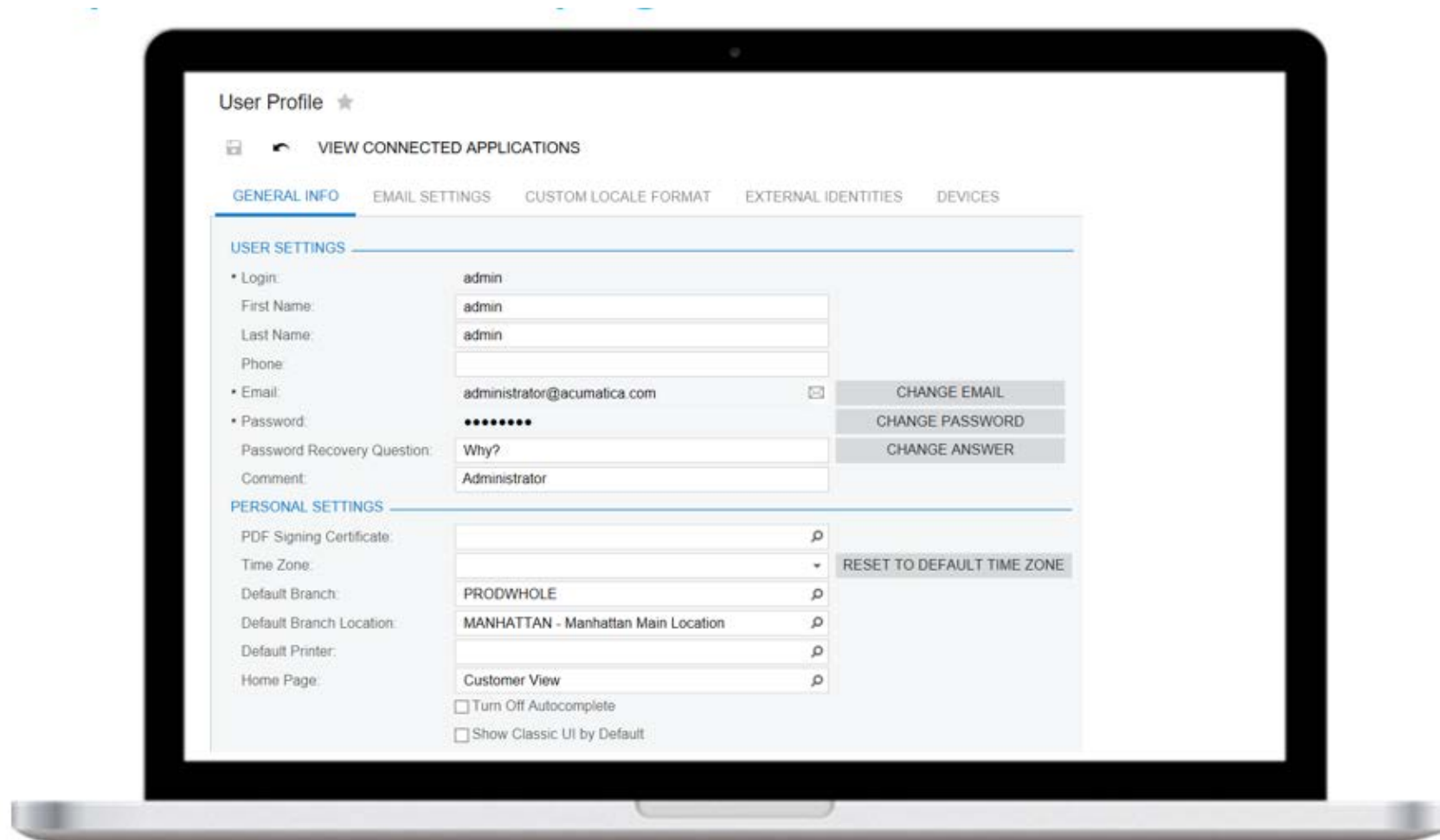
Welcome to Acumatica home page



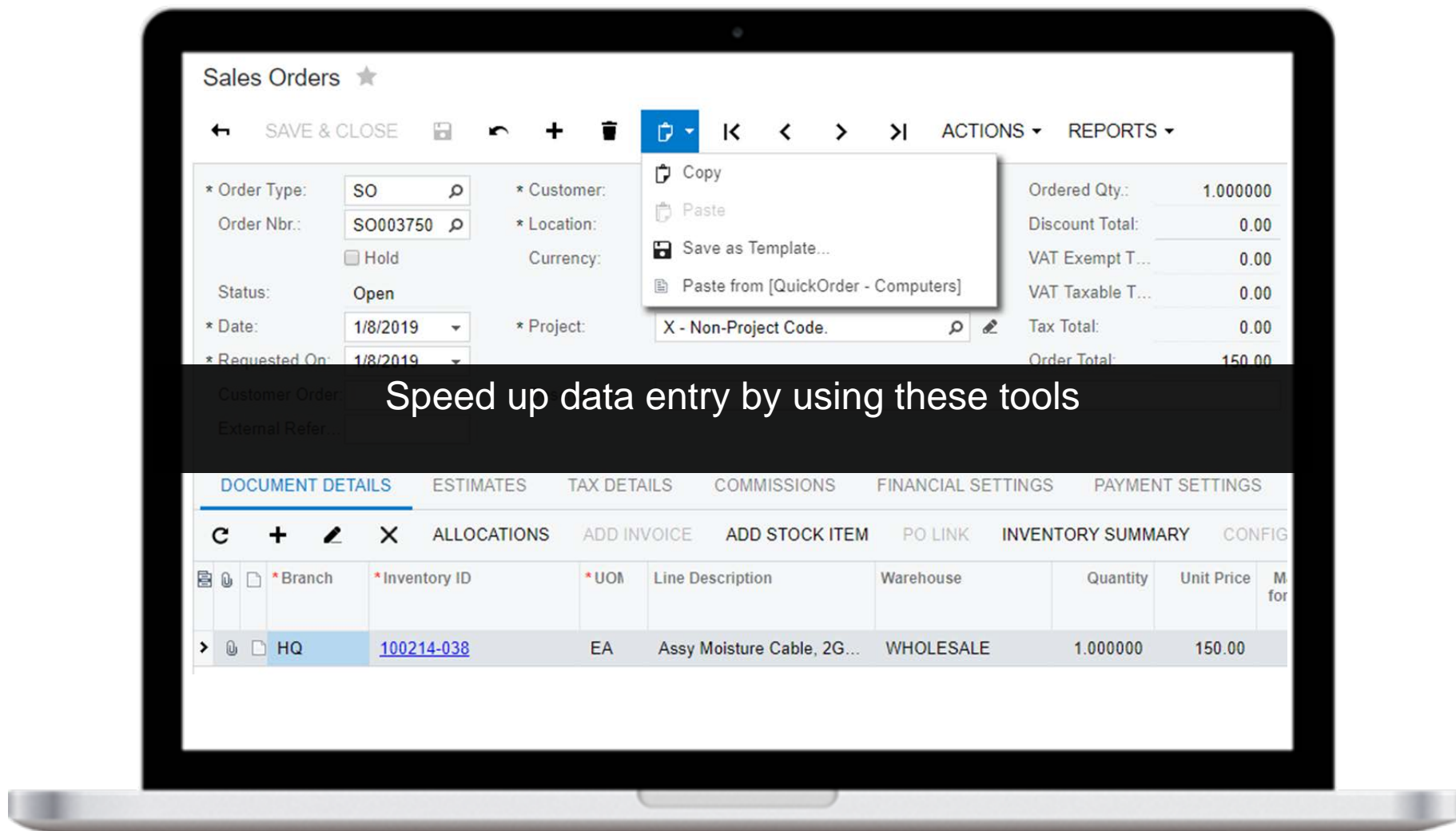
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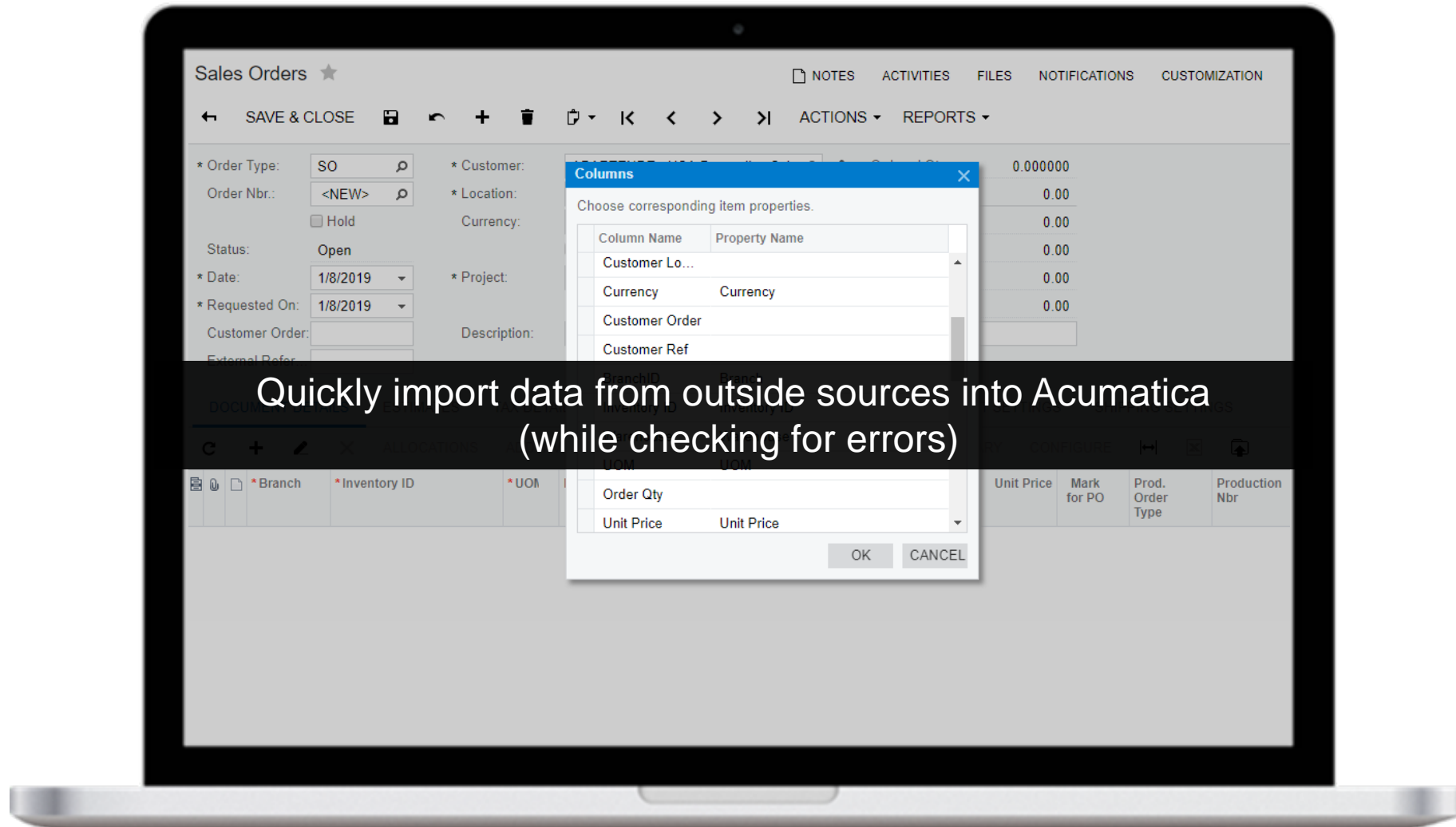
Set your personal home page



Copy/paste, using templates

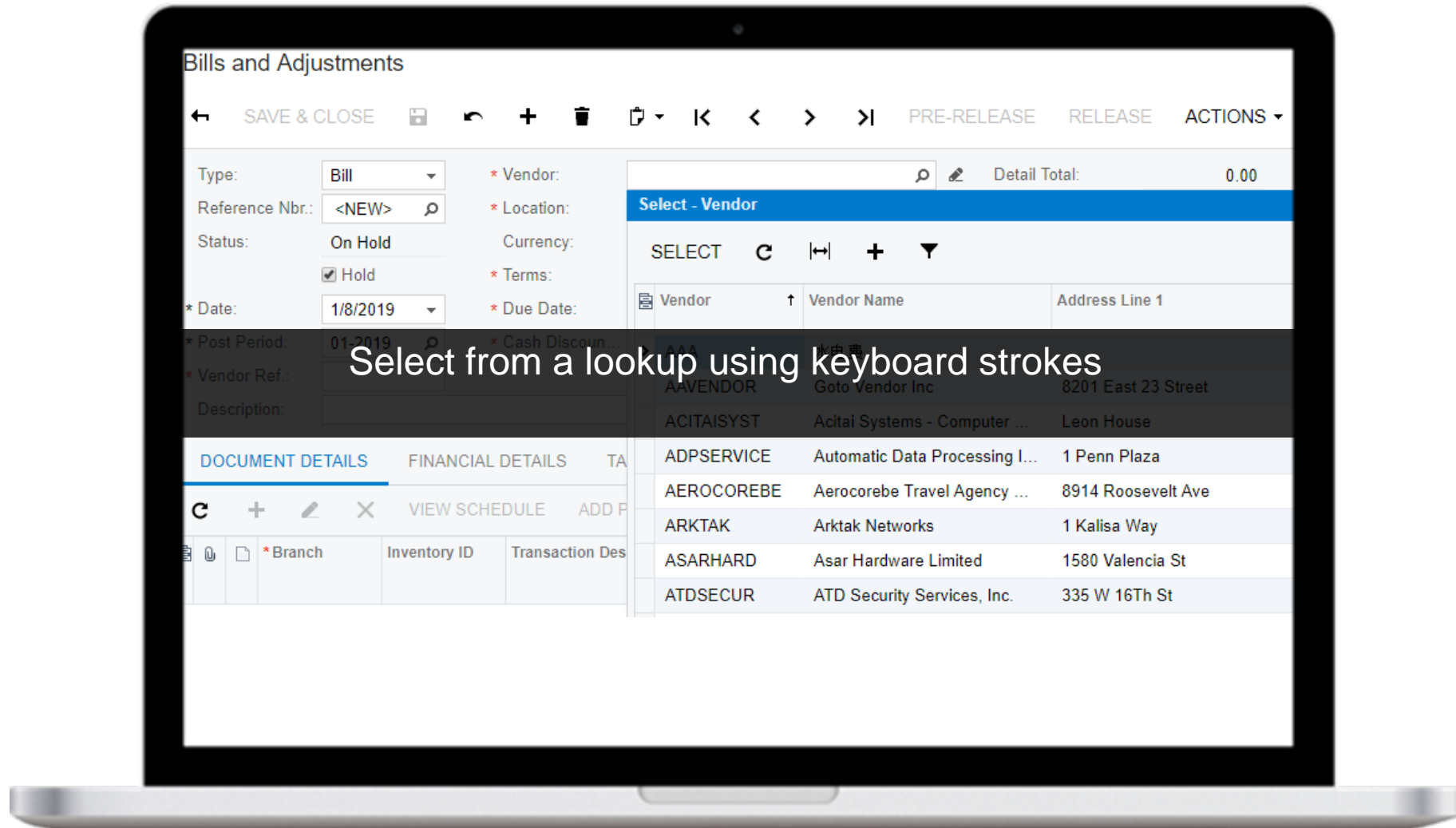


Screen level imports



Quickly import data from outside sources into Acumatica
(while checking for errors)

Function + F3



Shift+F

Bills and Adjustments ★



Type: All Status: All Date: All Vendor Name: Contains 'Goto ...'

	Type	Reference Nbr.	Status	Date	Post Period	Vendor	Vendor Name	Vendor Ref.	Amount
	Bill	000979	Open	12/27/2018	12-2018	AAVENDOR	Goto Vendor Inc	464	472.73
	Bill	000978	Open	12/26/2018	12-2018	AAVENDOR	Goto Vendor Inc	7574	33.00
	Bill	000977	Open	12/26/2018	12-2018	AAVENDOR	Goto Vendor Inc	754	100.00
>	Bill	000976	Open	12/13/2018	12-2018	AAVENDOR	Goto Vendor Inc	738	143.75
	Bill	000975	Open	12/7/2018	12-2018	AAVENDOR	Goto Vendor Inc	3124	40.91
	Bill	000974	Open	12/6/2018	12-2018	AAVENDOR	Goto Vendor Inc	3435	12.11
	Bill	000973	Open	11/21/2018	11-2018	AAVENDOR	Goto Vendor Inc	764	250.00
	Bill	000970	Open	11/12/2018	11-2018	AAVENDOR	Goto Vendor Inc	34212	300.00
	Bill	000969	Open	11/12/2018	11-2018	AAVENDOR	Goto Vendor Inc	6567	300.00

Create a filter by selecting any value in a grid

Side panels

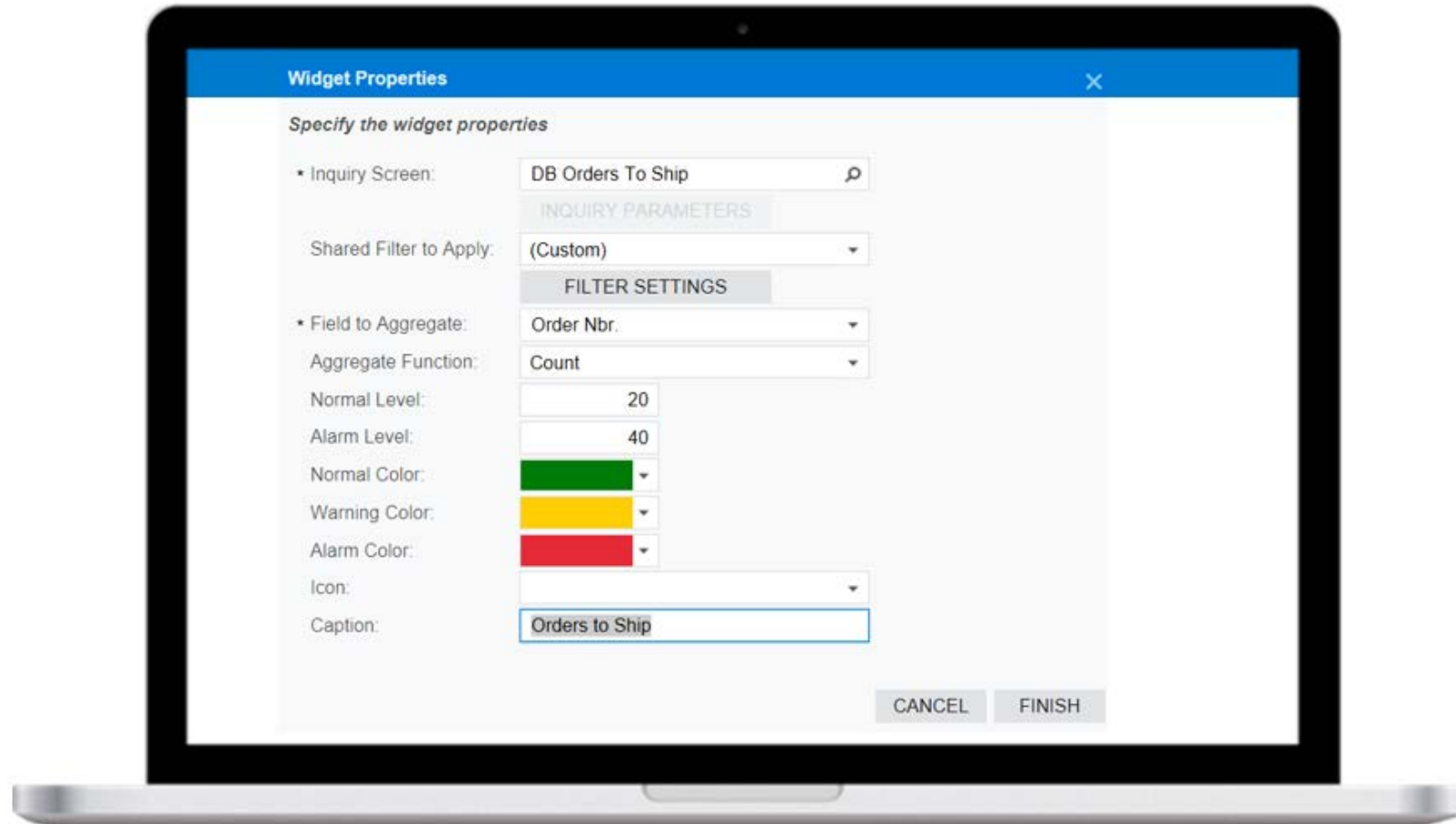
The screenshot displays the Acumatica software interface on a laptop screen. The main window is titled 'Sales Orders' and features a search bar at the top. Below the search bar, there are tabs for 'ALL RECORDS', 'MY SALES ORDERS', and 'SO PIVOT'. The 'ALL RECORDS' tab is selected, showing a list of sales orders with columns for Order Type, Order Nbr., Date, Ordered Qty., Sched. Shipment, and Customer. The list includes orders for customers like ABARTEN, ELEVATIO, ANTUNSV, BRASSKE, ELITEANS, CARIBBEA, MARINAG, ELEVATIO, WRIGHTC, ARTCAGE, WFAN, BEAUTYS, WIDGETC, CARIBBEA, BRASSKE, ELEVATIO, and ELEIMPOF.

The right sidebar, titled 'Customer View', shows the customer 'ABARTENDE' with a search bar for the Customer Account ID. Below this, there are sections for 'SALES OPPORTUNITIES AND ORDERS' and 'ACCOUNTS RECEIVABLE'. The 'SALES OPPORTUNITIES AND ORDERS' section includes four colored boxes: a green box for 'ORDERS TO SHIP' (3), a red box for 'LATE ORDERS' (3), a blue box for 'OPEN OPPORTUNITIES' (2), and a red box for 'OVERDUE OPPORTUNITIES' (2). Each box has a 'MORE DETAILS' link. The 'ACCOUNTS RECEIVABLE' section shows a red box for 'TOTAL CREDIT EXTENDED' (103.89K) with a 'MORE DETAILS' link.

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Dashboard design overview

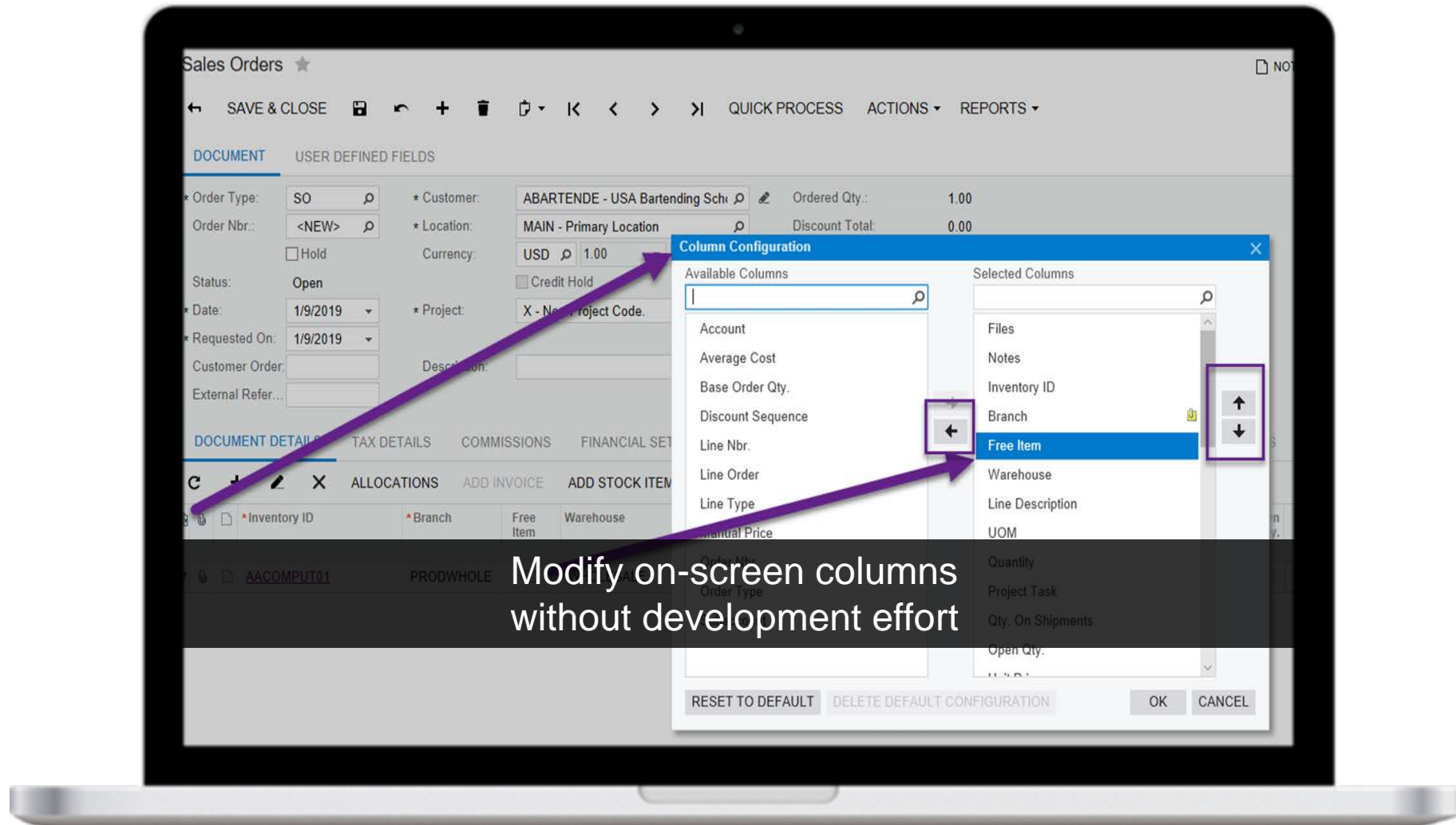


The image shows a laptop screen with a 'Widget Properties' dialog box open. The dialog has a blue header bar with the title 'Widget Properties' and a close button. Below the header, the text 'Specify the widget properties' is displayed. The main area contains several configuration options:

- Inquiry Screen:** A text field containing 'DB Orders To Ship' with a search icon to its right.
- Shared Filter to Apply:** A dropdown menu currently showing '(Custom)'. Below it is a tab labeled 'FILTER SETTINGS'.
- Field to Aggregate:** A dropdown menu showing 'Order Nbr.'.
- Aggregate Function:** A dropdown menu showing 'Count'.
- Normal Level:** A text input field with the value '20'.
- Alarm Level:** A text input field with the value '40'.
- Normal Color:** A color selection dropdown showing a green swatch.
- Warning Color:** A color selection dropdown showing a yellow swatch.
- Alarm Color:** A color selection dropdown showing a red swatch.
- Icon:** A dropdown menu with a downward arrow.
- Caption:** A text input field containing 'Orders to Ship'.

At the bottom right of the dialog, there are two buttons: 'CANCEL' and 'FINISH'.

Column configurator



Form View versus Grid View

Sales Orders ★

NOTES ACTIVITIES FILES NOTIFICATIONS CUSTOMIZ

SAVE & CLOSE QUICK PROCESS ACTIONS REPORTS

DOCUMENT USER DEFINED FIELDS

* Order Type: SO * Customer: ABARTENDE - USA Bartending Sch * Location: MAIN - Primary Location * Date: 1/9/2019 * Requested On: 1/9/2019

Order Nbr.: SO004577

Hold

Status: Open

Currency: USD 1.00 VIEW BASE

* Project: X - Non-Project Code.

Customer Order:

External Refer...

Description:

Ordered Qty.: 1.00

Discount Total: 0.00

VAT Exempt T... 0.00

VAT Taxable... 0.00

Tax Total: 0.00

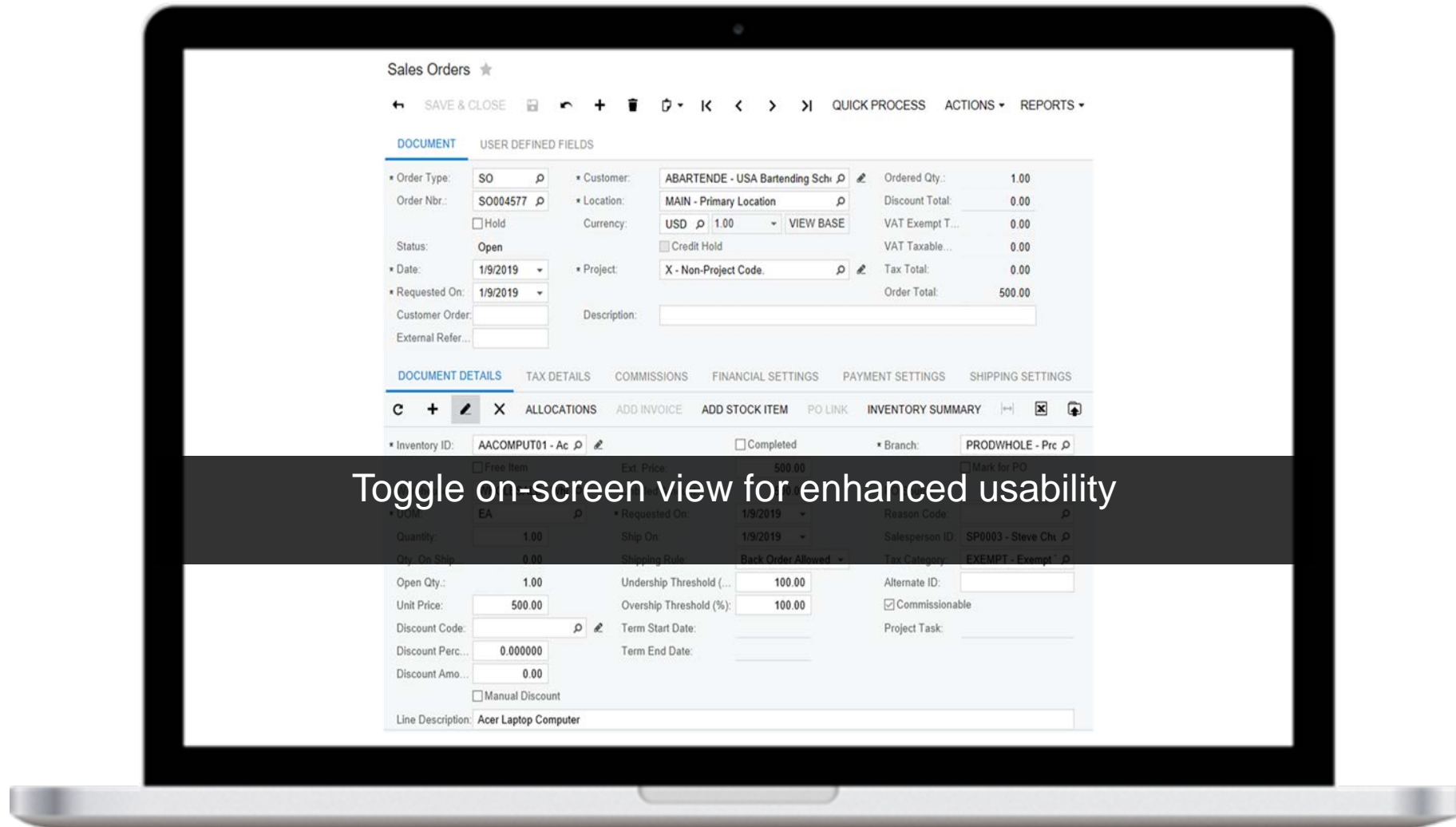
Order Total: 500.00

DOCUMENT DETAILS TAX DETAILS COMMISSIONS FINANCIAL SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS DISCOUNT DETAILS SHIPMENTS PAYMENTS TOTALS

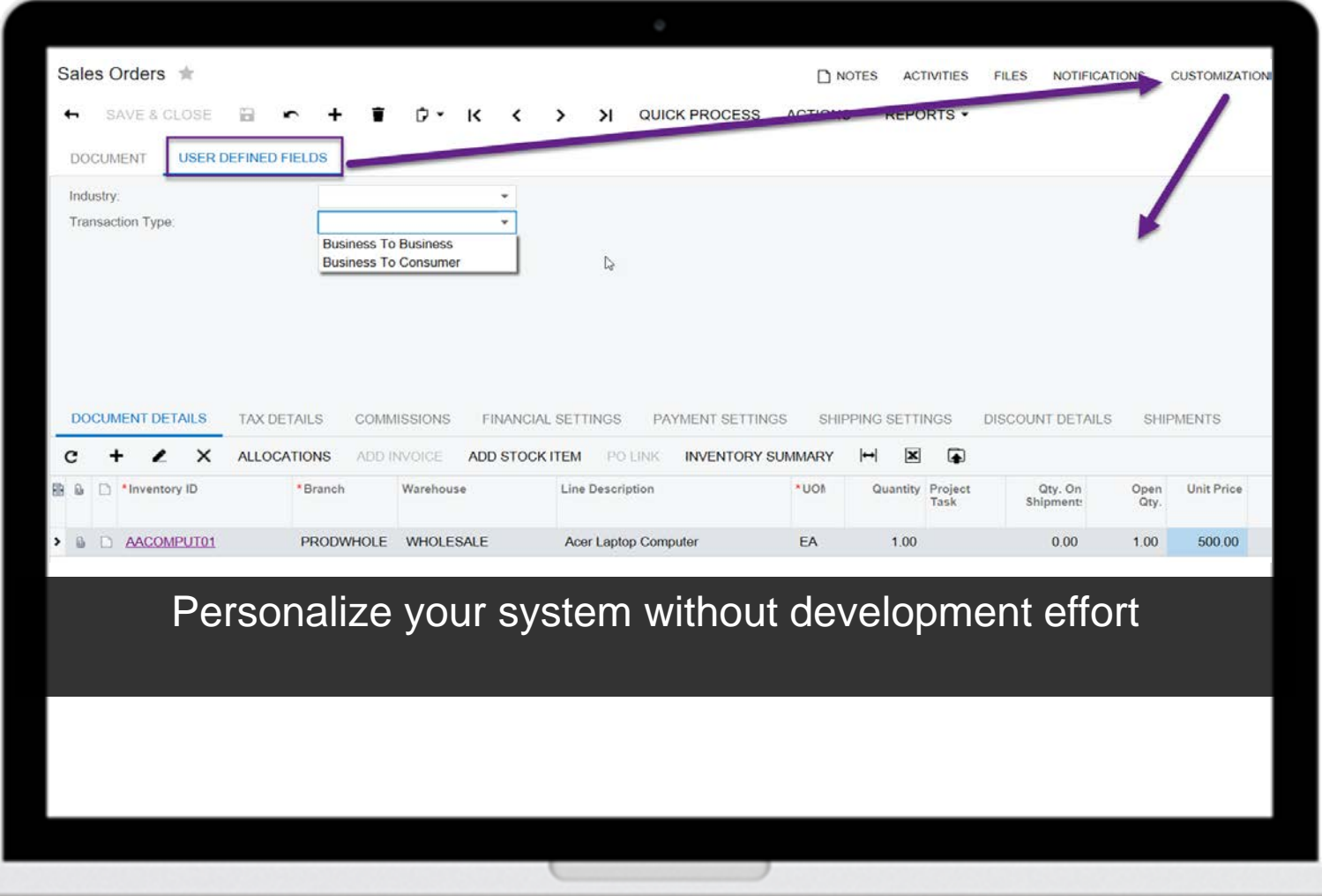
ALLOCATIONS ADD INVOICE ADD STOCK ITEM PO LINK INVENTORY SUMMARY

* Inventory ID	* Branch	Warehouse	Line Description	* UOM	Quantity	Project Task	Qty. On Shipment	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	Manual Discount
Aacomput01	PRODWHOLE	WHOLESALE	Acer Laptop Computer	EA	1.00		0.00	1.00	500.00	0.000000	0.00		

Form view vs grid view



User defined fields (udfs)



The screenshot displays the Acumatica Sales Orders interface. At the top, a navigation bar includes 'NOTES', 'ACTIVITIES', 'FILES', 'NOTIFICATIONS', and 'CUSTOMIZATION'. Below this, a toolbar contains 'SAVE & CLOSE', 'QUICK PROCESS', 'ACTIONS', and 'REPORTS'. The 'DOCUMENT' section is highlighted, and a box labeled 'USER DEFINED FIELDS' is shown. Below this, there are dropdown menus for 'Industry' and 'Transaction Type', with the latter showing options: 'Business To Business' and 'Business To Consumer'. A purple arrow points from the 'USER DEFINED FIELDS' box to the 'CUSTOMIZATION' tab. Another purple arrow points from the 'CUSTOMIZATION' tab to the 'USER DEFINED FIELDS' box. Below the 'DOCUMENT' section, there are tabs for 'DOCUMENT DETAILS', 'TAX DETAILS', 'COMMISSIONS', 'FINANCIAL SETTINGS', 'PAYMENT SETTINGS', 'SHIPPING SETTINGS', 'DISCOUNT DETAILS', and 'SHIPMENTS'. The 'DOCUMENT DETAILS' tab is active, showing a table with columns: 'Inventory ID', 'Branch', 'Warehouse', 'Line Description', 'UOI', 'Quantity', 'Project Task', 'Qty. On Shipment', 'Open Qty.', and 'Unit Price'. The table contains one row with the following data: 'AACOMPUT01', 'PRODWHOLE', 'WHOLESALE', 'Acer Laptop Computer', 'EA', '1.00', '0.00', '1.00', and '500.00'. Below the table, a dark banner contains the text 'Personalize your system without development effort'.

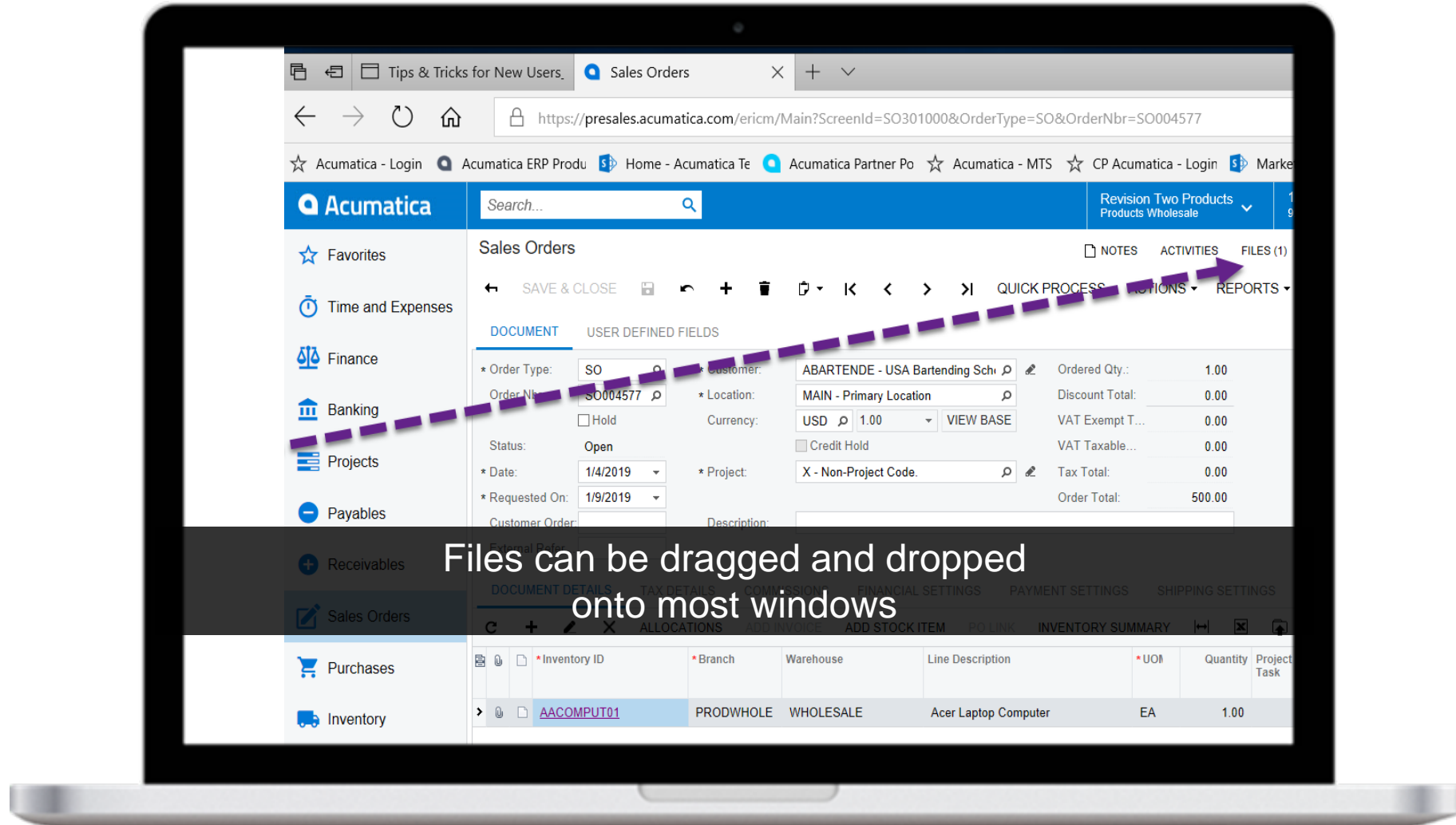
Personalize your system without development effort

Creating and Applying Filters

The screenshot displays the Acumatica Sales Orders interface. At the top, there are tabs for 'ALL RECORDS', 'MY SALES ORDERS', and 'CURRENT MONTH SALES ORDERS'. The 'CURRENT MONTH SALES ORDERS' tab is selected. Below the tabs, there is a table with columns: Order Type, Order Nbr., Date, Ordered Qty., Sched. Shipment, Customer, Customer Name, Order Total, Curr, Status, and Description. The table contains three rows of data. A purple box highlights the 'CURRENT MONTH SALES ORDERS' tab, and another purple box highlights a filter icon in the top right corner. A purple arrow points from the 'Date' column header to the 'Filter Settings' dialog box. The 'Filter Settings' dialog box is open, showing the filter configuration for 'Current Month Sales Orders'. The 'Date' column is selected, and the 'Condition' dropdown is set to 'This Month'. The 'Value' field is empty. The 'Bracket' and 'Operator' fields are also empty. The 'Filter Settings' dialog box has buttons for 'NEW', 'SAVE', 'COPY', 'REMOVE', 'APPLY', and 'CANCEL'.

Personalize your system without development effort

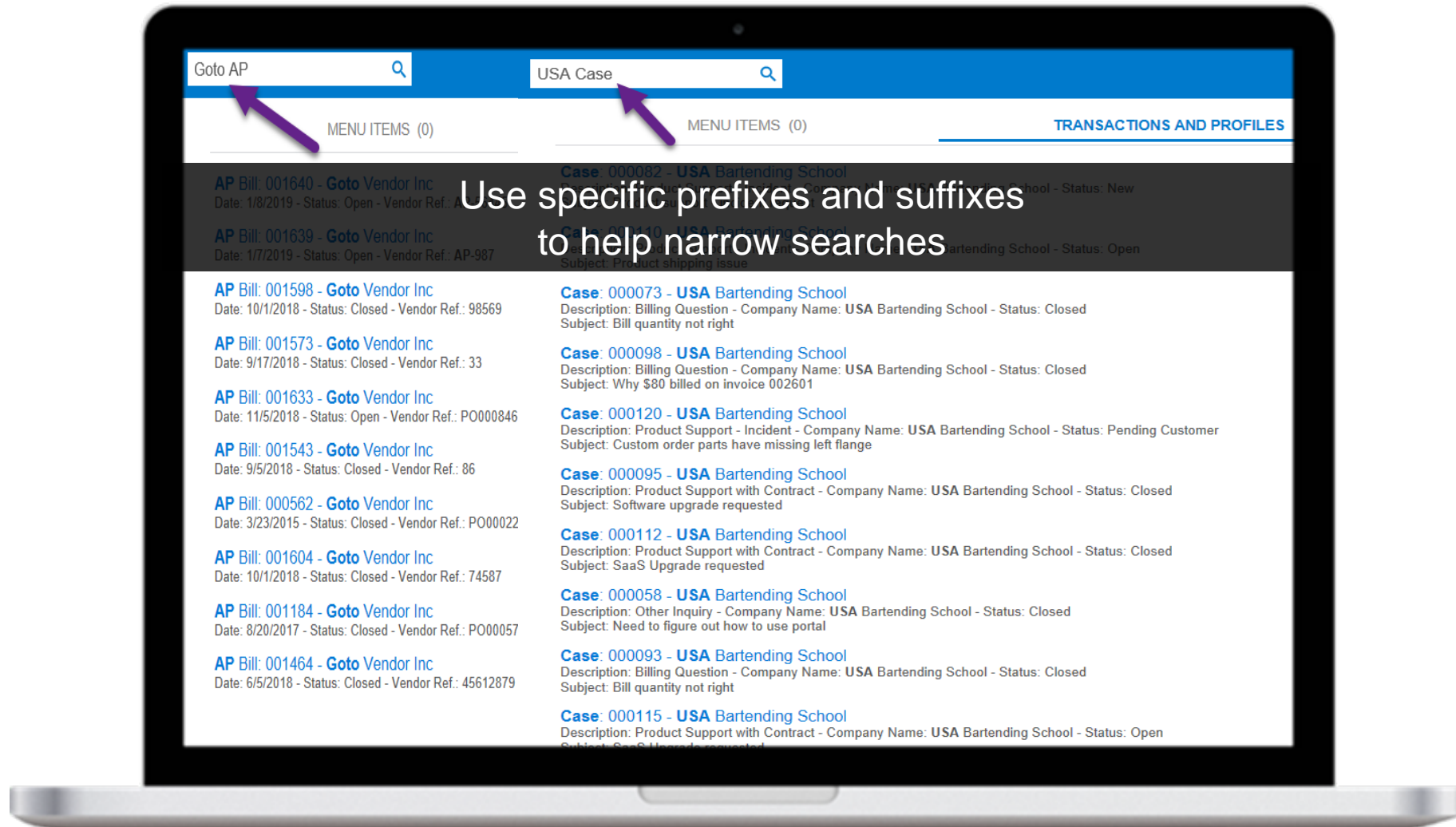
Drag & drop a file



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Advanced Universal Search



Drag and drop lines, Insert rows

Sales Orders

← SAVE & CLOSE

DOCUMENT USER DEFINED FIELDS

Order Type: SO Order Nbr: SO004579 Customer: ARTCAGES - Artcages Location: MAIN - Primary Location Currency: USD 1.00 Status: Open Date: 1/3/2019 Project: X - Non-Project Code. Requested On: 1/9/2019

Click and Drag a row to re-position

Moving or inserting lines will print in the same order on documents

Right-mouse click on a row for other options

DOCUMENT DETAILS TAX DETAILS COMMISSIONS FINANCIAL SETTINGS

ALLOCATIONS ADD INVOICE ADD STOCK ITEM PO LINK INVENTORY SUM

Inventory ID	Branch	Warehouse	Line Description
AACOMPUT01	PRODWHOLE	WHOLESALE	Acer Laptop Computer
WIDGET02	PRODWHOLE	WHOLESALE	Harvil 4 Foot Air Hockey Table
WIDGET02	PRODWHOLE	WHOLESALE	Widget 02 - Serial numbered item
AALEGO500	PRODWHOLE	WHOLESALE	Lego 500 piece set
CONCHAIR1	PRODWHOLE	WHOLESALE	Caravan Canopy Recliner

Inventory ID Branch Warehouse Line Description

- Refresh
- New Line
- Form View
- Delete
- Add Stock Item
- PO Link
- Inventory Summary
- Adjust
- Export
- Upload
- Insert Row
- Cut Row

Add dashboards and G.I.s to mobile

Access critical ERP data from your mobile device

Dashboards ★

VIEW RESET ALL USER COPIES

* Name: Project Manager

Site Map Location: Project Manager

* Owner Role: DashboardDesigner - Dashboard Designer

☒ Allow Users to Personalize

☒ Expose to Mobile

ADD NEW NODE

Generic Inquiry ★

VIEW INQUIRY EXPORT AS REPORT

* Inquiry Title: DB-ProjectStatus

Site Map Title: DB Project Expense vs Budget

Site Map Location: Hidden Generic Inquiries

Screen ID: GI000030

Arrange Parameters in: 3 columns

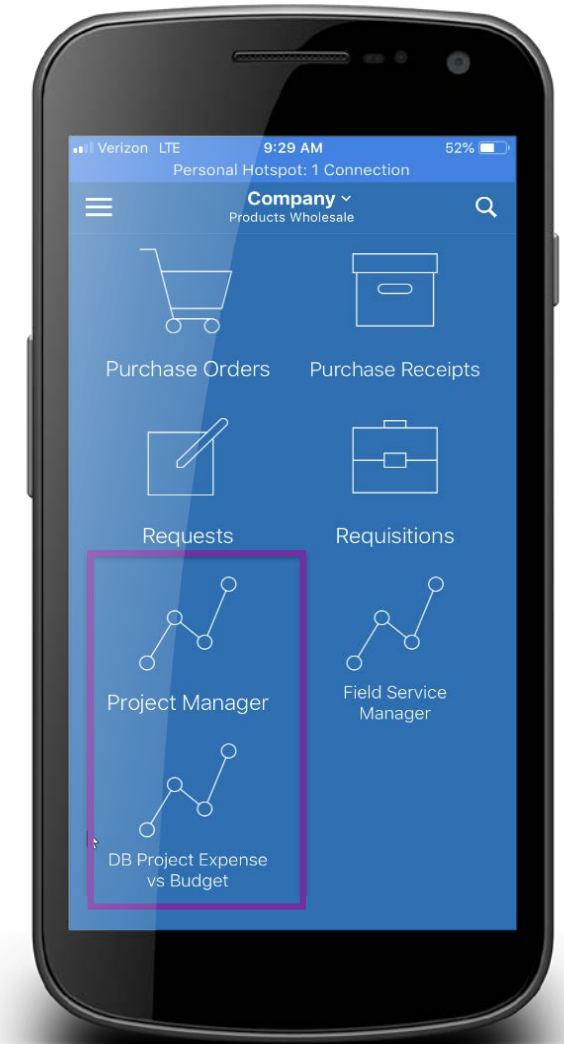
Select top: 0 records

Records per Page: 0

Export Top: 0 records

☐ Expose via OData

☒ Expose to Mobile



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Business events & push notifications

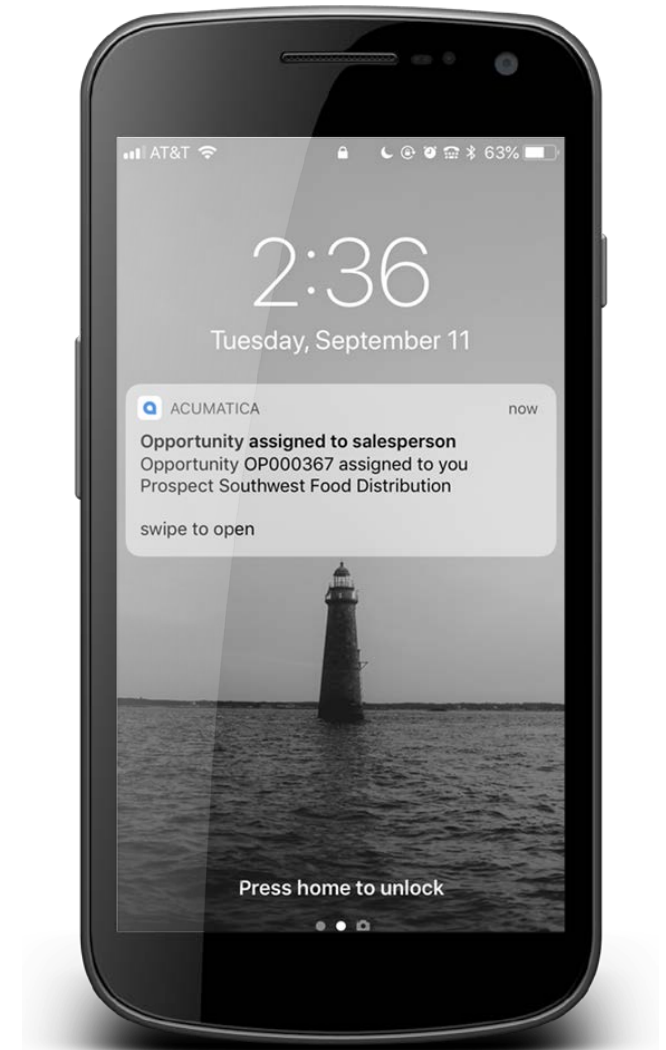
Receive instant notifications from Acumatica to your mobile device

The screenshot shows the 'Business Events' configuration page in the Acumatica system. The page has a header with 'Business Events' and a toolbar with icons for saving, deleting, and navigating. The main form contains the following fields:

- * Event ID: Opportunities 1 - salesperson
- * Type: Trigger by Record Change
- Raise Event: For Each Record
- * Screen Name: DB Opportunities
- Screen ID: GI000026
- Shared Filter to Apply: All Records
- ☒ Active
- Description: Opportunity assigned to you

Below the form are two tabs: 'TRIGGER CONDITIONS' (selected) and 'SUBSCRIBERS'. Under 'TRIGGER CONDITIONS', there is a table with one row:

Active	Bracke	Operation	Table Name	Field Name	Condition	Value 1
<input checked="" type="checkbox"/>	-	New Field Value	CROportunity	Owner (ownerID)	Is Not Null	



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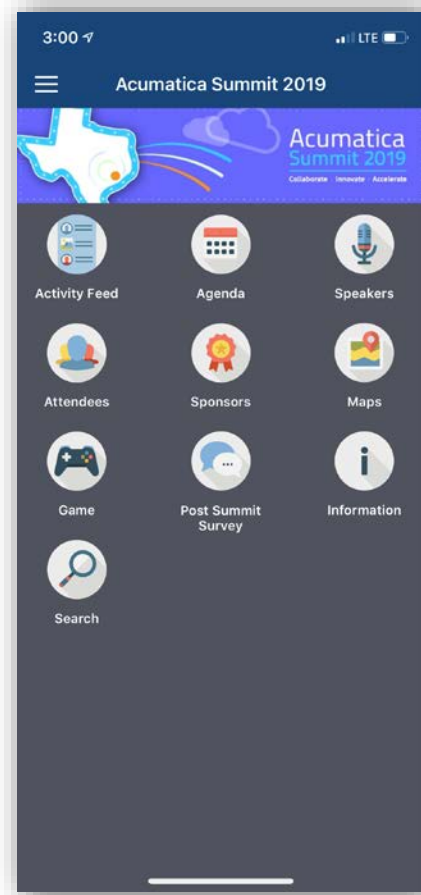
WHERE CAN I GET HELP?



RESOURCES

- Help file: <http://docref.acumatica.com>
- Known issues: <https://portal.acumatica.com/release-notes/known-issues/>
- Videos: Acumatica and YouTube
- LinkedIn group (one for partners, one for customers/users)
- Premier support: open a support case
- Acumatica blog – tech Tuesday
- Technical: GitHub, <https://github.com/acumatica>
- Technical: Post on Stack Overflow, tag as Acumatica

Event App



Utilize our event app!

Key features:

- Network with attendees
- Plan your agenda and activities
- Interact with sponsors
- Provide session feedback

Search/Download for
CrowdCompass from
the App store

Login using your email address
you used to register



Participate in Expo Treasure Hunt for a chance to win!



Pick up your
Treasure Hunt Map
from the Acumatica booth



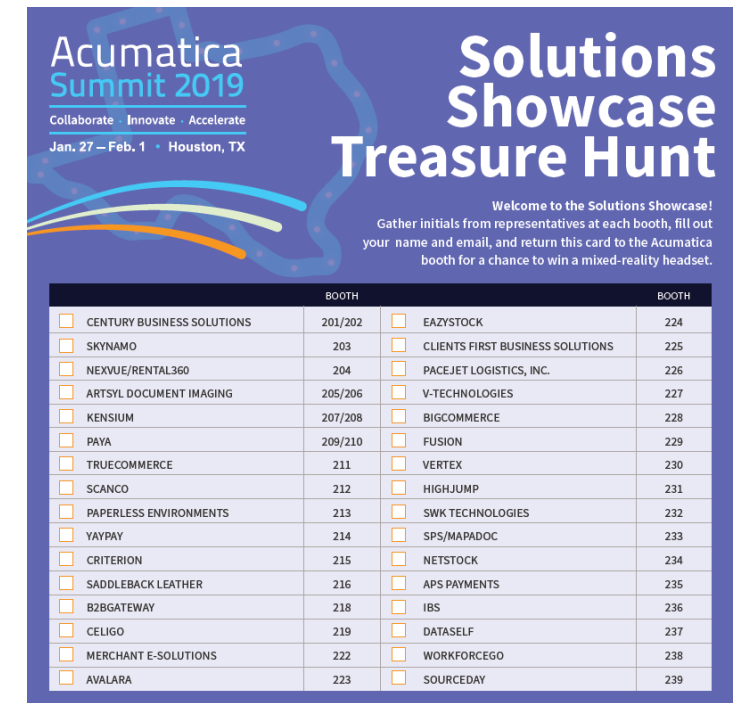
Visit each exhibitor's table
on your card and collect
a sticker with their logo



Fill your card and drop it at Acumatica's booth
to enter our raffle (don't forget your name and email!)



Winning prize is a Mixed Reality Headset



Connect with Acumatica!



Visit the Acumatica team in the booth located in the Expo next to escalator



Tell the world what you're learning at Summit

And how much fun you're having in Houston!



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Thank You!

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