

Release Notes

Acumatica ERP 5.1

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Introduction

This document provides important information about changes and new features that are available in this release. The document is of particular interest to those who install Acumatica ERP 5.1 or develop applications for it. All users can benefit from reviewing the content to determine where they may benefit from the changes in this release.

Application New Features and Improvements

Acumatica ERP 5.1 includes multiple improvements to the modules in the Finance, Distribution, Customer Management, and Customer Portal applications. In addition to improvements in the application functionality, there is now new “Feature Switches” that will turn off currently unused application functionality until you want it turned back on.

Finance and Distribution

Deferred Revenue recognition

Several improvements were made in the Deferred Revenue module to comply with US accounting practices. Originally ASC 985-605 that addresses the revenue recognition of mixing tangible (like a computer) with non-tangible products (such as software). The 5.1 changes are in the configuration of a multiple component package of stock item or non-stock items.

Notes:

- The new **Multi-Deliverable Arrangements** check box is added to the [Deferral Codes](#) (DR.20.20.00) form, select it for a deferral code for configuring packages.
- Also, two recognition methods are added on the [Deferral Codes](#) form—*Flexible by Periods, Prorate by Days*, and *Flexible by Days in Period*. By using these methods, the system can specify the exact start date and end date of the deferral period for an item on a particular invoice (you can edit these dates manually).
- As the new component amount allocation method is added, the *Residual* allocation method will appear in the **Allocation Method** list on the **Deferral Settings** tab of the [Non-Stock Items](#) and the [Stock Items](#) forms.
- Now a discount can be applied not only to the total package price, but also to the fair value of the package component, that is new deferred revenue or expense amount. This is controlled with the **Apply to Deferred Revenue** check box on the [Discount Codes](#) (AR.20.90.00) form.

For details, see [Revenue Recognition for Packages](#) in Acumatica ERP 5.1 User Guide.

Invoicing Billable Time through Contracts without CRM

The Time & Expenses module has been modified to allow billing for time of employee activities through a contract even when *Customer Management* feature is disabled on the [Enable/Disable Features](#) (CS.10.00.00) form.

The time activity of an employee can be associated with the contract on the [Employee Time Activities](#) (EP.30.70.00) form. When the time activity is released (by using the [Release Time Activities](#) (EP.50.70.20) or the [Release Time Cards](#) (EP.50.50.10) forms), the respective transaction will be on the [Contract Usage](#) (CT.30.30.00) form. The billable time of activities associated with non-stock items that are not included in the contract is presented on the invoice as a separate line.

Notes:

- Enable the *Time Reporting on Activity* feature on the [Enable/Disable Features](#) form.
- The **Contract ID** column has been added to the [Employee Time Activities](#) form. Select the active contract to associate with a time activity.
- Once the *Customer Management* feature is enabled on the [Enable/Disable Features](#) form, the **Contract ID** column is hidden and no longer can a time activity be directly associated with a

contract. Instead the time activity is associated with a contract by using cases that belong to a case class that is billed on a per-activity basis.

For details, on recording contract usage by using different Acumatica ERP entities, see [Contract Usage Recording](#) and [Contract Examples](#) in Acumatica ERP 5.1 User Guide.

Dunning Letters

New in Acumatica ERP 5.1, a dunning level will be associated with a particular document (invoice or memo). When you upgrade to 5.1, the system assigns a dunning level to a document that is equal to the level of the last dunning letter that included this document. If the document has not been included in a dunning letter yet, the system sets a 0 dunning level for that document.

With the dunning level of a document implemented, you can select how the system prepares dunning letters through grouping overdue documents by:

- Customer account (the *By Customer* option)
- Customer account and by the dunning level of a document (*By Document*)

The default is the *By Customer* option which provides the dunning process similar to the one offered by Acumatica ERP in the prior versions. If more manual control over the process is desired, select the *By Document* option.

Notes:

- The dunning process workflow and the rules of generating dunning letters depend on the selected option (*By Customer* or *By Document*).
- Outstanding documents can be excluded from a dunning letter or from a dunning process. Also, you can exclude a customer account from the dunning process.
- Ability to generate an invoice for dunning fee is added.

For details, see [Managing Dunning Letters](#) in Acumatica ERP 5.1 User Guide.

Sales Order Prepayment Option

Now by using the **Create Prepayment** button, a prepayment can be created on the **Payments** tab of the [Sales Orders](#) (SO.30.10.00).

For details, see [Payment Reservation for Sales Orders](#) in Acumatica ERP 5.1 User Guide.

Sales Orders Approval

Many organizations have workflows for reviewing and approving sales orders and in most cases approval is required for credit sales. With Acumatica ERP, in addition to credit check, which is performed automatically on saving new sales orders, specific sales orders can be automatically assigned to employees authorized to perform approvals. Parallel or sequential (multi-step) approval of sales orders can be configured.

The functionality of approvals is available only if the *Approval Workflow* feature is enabled on the [Enable/Disable Features](#) form.

For details see, [Approval of Sales Orders](#) in Acumatica ERP 5.1 User Guide.

Sales Order Serial or Lot Specification

When creating SO and SA sales orders, the items can be reserved by using the **Allocations** dialog box. In Acumatica ERP 5.1 the lot or serial numbers of the items are now displayed in this box, so the search and selection of the items can be done by the lot or serial numbers, assigned to items on receiving.

Custom Fixed Asset Types

Along with predefined the fixed asset types supplied with the system such as land, buildings, equipment or copyright, custom fixed asset types specific to a company business needs can be created.

For details, see [Fixed Asset Types](#) in Acumatica ERP 5.1 User Guide.

Delayed Posting to COGS

If invoices are processed after inventory is issued, Acumatica ERP 5.1 allow delayed posting to COGS accounts by using the Shipped-Not-Invoiced account (and the Shipped-Not-Invoiced subaccount). With this option selected, on release of inventory issues the costs will be temporarily recorded (as debit amounts) to the shipped-not-invoiced accounts, and on release of invoices, the costs will be moved from the shipped-not-invoiced accounts to the COGS accounts.

Customer Management

Acumatica ERP 5.1 includes the following improvement to the Customer Management module.

Email Activity Archival Process

Emails can now be archived automatically by configuring the archival period on the [Email Preferences](#) (SM.20.40.01) form. By default, automatic archiving is disabled. The archival happens during the send/receive process and works faster when performed for one email account at a time. Also, the user can use the **Archive** action on email-related forms to archive any particular email.

Notes:

- Automatic email archiving depends on the last modified date of the email activity.
- The system archives only the records in the system database. No archiving is performed on email servers.
- Emails associated with deleted system email accounts cannot be archived automatically; for deleted accounts, only manual archiving can be performed.

For details, see [Email Archiving](#) in Acumatica ERP 5.1 User Guide.

Customer Portal

Acumatica ERP 5.1 includes the following improvements to Acumatica Self-Service Portal.

Email Notification for New Case Activity

New in Acumatica ERP 5.1, a notification can be sent to the case owner when new note or file is attached to case from the Self-Service Portal. To start sending notifications, use the notification template on the [Portal Preferences](#) (SP.80.00.00) form. The template can be customized by using the [Notification Templates](#) (SM.20.40.03) form.

For details, see [Configuring Acumatica Self-Service Portal](#) in Acumatica ERP 5.1 User Guide.

Wiki Management Functionality in Self-Service Portal

With the new functionality the wiki configuration and editing tasks can be performed directly by using Self-Service Portal. A user with access rights for managing wikis can sign in to Self-Service Portal and add or manage Self-Service Portal wikis. The added wikis are automatically added to the Self-Service Portal site map.

A user who has the access rights for editing wikis, can add, delete, edit, and manage wiki articles directly by using Self-Service Portal.

The users with the roles *Admin*, *Portal Admin*, *Wiki Admin*, and *Wiki Author* have access to the Self-Service Portal wiki functionality (**Configuration > Knowledge Base Management**). If required, you can configure other roles.

Notes:

- Tab **Access Rights** was changed to **Visibility Settings**. Visibility settings now are taken from Access Rights on current location of wiki. The change was made to avoid confusion when a user has access to some Wiki location, but his or her rights on that wiki are revoked so he or she sees empty navigation pane.
- The **Add Wiki** button is removed from Portal Site Map.

For details, see [Managing Self-Service Portal Wikis](#) in Acumatica ERP 5.1 User Guide.

Cross Application Additions

New Feature Switches

Following on the work done in Acumatica ERP 5.0, the new Acumatica ERP 5.1 has added more Feature Switches to improve connectivity. Feature Switches turnoff application functionality that is not currently being used. With unused features disabled, there is less configuration required. Plus the result is a simplified UI. If the features are not needed, users are not bothered by them.

The following feature switches were added:

- Overdue Charges
- Allocation Templates
- Commissions
- Translation of Financial Statements
- Customer & Vendor Discounts
- General Ledger Consolidation
- Purchase Requisitions
- Advanced Physical Counts
- Kit Assemblies
- User-Defined Order Types
- Allocations
- Replenishment
- Approval Workflow

Notes:

- The *Warehouse Locations* and *Warehouses* feature switches were changed—now it is possible to enable warehouse with location, but without multiple warehouses.
- When the *Approval Workflow* feature is disabled, the expense claims approval starts using simple approval engine based on 'Reports To' value of Employee record.

Notifications to Preassigned Approvers

In Acumatica ERP 5.1 pre-configured notifications can now be assigned to approvers for these documents:

- Expense Claims
- Time Cards
- Equipment Time Cards
- Purchase Orders
- Cash transactions
- Requests
- Requisitions

Specific notifications are selected in the desired module setup. Notification templates can be added or modified on the [Notification Templates](#) (SM.20.40.03) form. Both parallel and serial approval are supported.

Notes:

- Use **Approval.OwnerID.Email** data field in notification templates as address placeholder in **To** field.
- To change notification templates activate feature switch *Change Notifications* on the [Enable/Disable Features](#) form.
- To disable notifications clear **Pending Approval Notification** field from setup screens of the corresponding modules.

Platform Improvements

Platform New Features

Feature Switch for "Workflow Automation"

Workflow Automation feature provides the ability to customize workflows by means of automation steps, and gives you the ability to back up and store automation definitions that include all the automation steps defined in the application.

AD FS Support

Acumatica ERP now supports integration with Microsoft Active Directory Federation Services (AD FS) which allows for single sign-on (SSO) regardless of services you use for identity and access management. The domain users authenticate themselves with their AD FS credentials, and then sign in to Acumatica ERP; the roles are assigned automatically based the user domain groups.

For details, see [Integrating with Identity and Access Management Systems](#) in Acumatica ERP 5.1 User Guide.

Locales, Roles, GI and Import Scenarios Are Now Included Into Customization Project

Translation dictionaries, access right with roles, generic inquiries and import/export scenarios are now available as project items in the Customization Project Editor.

Optimized GI Performance When Using Placeholder-Based Filters

Performance of the inquiries filtered by placeholder filters (like @me, @myworkgroups, @myworktree) has been dramatically improved.

Add Support of OData to Generic Inquiries

Acumatica ERP 5.1 adds the ability to expose generic inquiries through OData, an open standard that's defined at odata.org. The **Expose via OData** (on the [Generic Inquiry](#) form) checkbox enables OData access for an inquiry. System will dynamically update the OData catalog with your inquiry. The list of inquiries exposed by using OData can be accessed right from the browser by appending Acumatica ERP URL with /OData/CompanyName/ (or /OData is site is only for a single company). System will request the credentials and will provide the set of data views available for the user who is authorized with the system. You can consume these data views using JSON or ATOM notation or you can use an application like Microsoft Excel, Power Pivot or PowerBI to consume these services without programming.

XML Sitemap Structure of Mobile Application is Documented

The Acumatica ERP Mobile Framework guide describes how to configure the mobile application. To configure the mobile application, you use the `mobilesitemap.xml` file located in the `\App_Data\Mobile` folder of the website on the server. The `mobilesitemap.xml` file contains description of the elements that should appear on the mobile device including the main menu, screens, fields, and actions. You can have several files describing screen mappings for the mobile application. The `mobilesitemap.xml` file is the main file. The system processes other files after the `mobilesitemap.xml` file and merges the mappings from these files with the mappings from the `mobilesitemap.xml` file, overwriting existing settings and adding the new ones. To identify and compare elements, the system uses the names of the elements and their position in the tags hierarchy.

Other Improvements

- Updates in wiki access rights configuration. Now you configure the access rights on wikis for a role by using Access Rights by Role (SM.20.10.25) or Access Rights by Screen (SM.20.10.20) form. Accordingly, on the Wiki Access by Role (SM.20.20.15) form, a user with the role assigned will be able to view and configure rights on only the wikis to which this user has access.

Analytical Report Manager

Acumatica ERP 5.1 includes multiple improvements to the analytical reports.

Ability to Retrieve Currency Value for Denominated Accounts

The report designer now allows you to retrieve foreign currency amounts for denominated amounts. By using the *Data Source* attribute available on the [Column Sets](#) (CS.20.60.20) form and on the [Row Sets](#) (CS.20.60.10) form, you can specify an appropriate amount type, such as *Currency Turnover*, *Currency Beginning Balance*, or *Currency Ending Balance*, in the corresponding box of the Data Source Editor.

Format Property is Added to Row Sets

It is now possible to define a custom format for specific rows in a row set. For example, this can be used to add a row that shows the gross profit percentage in a P&L report. If no formatting is specified on the row set, the system uses the formatting defined for the column in the column set.

Visibility Condition is Added for Columns/Rows

The report designer now allows you to hide unneeded columns in your report. By using the new *Visible Formula* attribute on the [Column Sets](#) (CS.20.60.20) form, you can define conditions of hiding a column when you run a report. You can use this feature when there is no need to display some columns in the report as they do not contain appropriate data yet.

Rounding

The new rounding setting, which you configure in the column set of the ARM report, is added. Now, you can set up the level of rounding that will be used in each particular column of your report to round the values. The following rounding options are available: No Rounding, Thousands, Whole Thousands, Millions, Whole Millions, Billions, and Whole Billions.

Lazy Loading

The problem of long loading of a report that contains multiple unit sets is solved. Now, each unit set can be loaded on demand by a user request that significantly decreases the loading time.

User Interface

Date Picker Usability Improvements

The way a user enters dates has been improved: typing a date like *3/3/2014* now is transformed to *03/03/2014* automatically. Also, the support for using arrow keys has been added to calendar box.

For details, see [Shortcut Keys](#) in Acumatica ERP 5.1 Interface Guide.

Rich-text editor supports Paste-as-Text mode

The rich-text editor (RTE) now supports Paste-as-Text mode. With the mode on, the formatting of the text is removed when the text is pasted from the clipboard.