Getting Started

A150 Getting Started with Acumatica ERP

Training Guide

Acumatica
The Cloud ERP

Last Revision: 4/9/2020
Acumatica ERP 2020 R1

Contents

Copyright

Software Version: 2020 R1

How to Use This Course

This course provides a set of lessons for the user new to Acumatica ERP. The course is based on the *U100* dataset. To complete the course, make sure that you have installed an Acumatica ERP 2020 R1 instance with the *U100* dataset, or a system administrator has performed this task for you.

You perform the following general steps to complete the course:

1. You sign in to an Acumatica ERP 2020 R1 instance.
2. You complete all the lessons one by one.
3. At Partner University, you read the rules of the assessment test.
4. At Partner University, you take the A150 Certification Test.

What is in a Lesson?

A lesson provides a brief user scenario, a description of the Acumatica ERP UI elements, forms, reports, or dashboards, and basic operations a user can perform with these objects. Almost each lesson includes a process activity that you have to complete in your Acumatica ERP instance to learn how to perform the operations that will introduce you to the system functionality. The *Learning About Acumatica Educational Resources* lesson provides information about the websites you can use to learn more about the product and services.

What Are the Documentation Resources?

The complete Acumatica ERP documentation is available on *https://help.acumatica.com/* and is included in the Acumatica ERP instance. While viewing any form used in the course, you can click the **Open Help** button in the top pane to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related concepts and procedures and to open a reference topic with detailed descriptions of the form elements.

How to Create a Tenant with the *U100* Dataset

To add to an existing Acumatica ERP instance a tenant with the *U100* dataset, which is required for the completion of this course, perform the following instructions:

1. Go to *http://acumatica-builds.s3.amazonaws.com/index.html?prefix=builds/*.
2. Open the folder of your Acumatica ERP instance version.
3. In this folder, open the **Snapshots** folder, and download the **u100.zip** file.
4. Launch the Acumatica ERP instance, and sign in.
5. Open the *Tenants* (SM203520) form, and click **Add New Record** on the form toolbar.
6. In the **Login Name** box, type the name to be used for the tenant.
7. On the form toolbar, click **Save**.

8. On the **Snapshots** tab, click **Import Snapshot**.
9. In the **Upload Snapshot Package** dialog box, select the **u100.zip** file, which you have downloaded, and click **Upload**.

   The system uploads the snapshot to the **Snapshots** tab of the *Tenants* form.
10. On the form toolbar, click **Restore Snapshot**.
11. If the **Warning** dialog box appears, click **Yes**.
12. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded, and click **OK**.
13. Sign out of the current tenant.

    You are now on the Sign-In page, and you can sign in to the tenant you have just created.

Licensing Info

For educational purposes of this course, you use Acumatica ERP under the trial license that doesn't require activation and provides all available features. For production, you have to activate the purchased license; each particular feature may be a subject to additional licensing; please consult the Acumatica ERP sales policy for details.

Company Story

This topic explains the organizational structure and operational activity of the company with which you will work during this training.

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- SweetLife Head Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces.
- SweetLife Store: This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse.
- Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch sells juicers, installs juicers, trains customers' employees to operate juicers, and provides juicer servicing.

Operational Activity

The company has been operating starting in the *01-2019* financial period. In November 2019, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. Because the company has grown, the equipment center has begun its operations in *01-2020*.

Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors. The company also purchases juicers for sale from a large juicer vendor and either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

Company Sales and Services

Each company's branch has its own business processes, as follows:

- SweetLife Head Office and Wholesale Center: In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafés. The company also conducts home canning training at the customer's location and webinars on the company's website.
- SweetLife Store: In the store, small retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).

- Service and Equipment Sales Center: This branch sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services.

Lesson 1: Accessing Acumatica ERP

Accessing Acumatica ERP: General Information

The first thing to do when you want to work with Acumatica ERP is sign in to the system. In the following sections, you will find information about accessing the Acumatica ERP instance.

Learning Objectives

In this chapter, you will learn how to do the following:

- Sign in to Acumatica ERP
- Switch between the available companies and branches
- Sign out of Acumatica ERP

Applicable Scenarios

You need to learn about accessing Acumatica ERP if you are new to the system and are planning to sign in to the Acumatica ERP instance for the first time.

Access to Acumatica ERP

Acumatica ERP is a web-based application. To begin the sign-in process, you bring up a web browser and type the URL of the Acumatica ERP.

For working with Acumatica ERP, we recommend that you use the following web browsers:

- Google Chrome
- Mozilla Firefox
- Apple Safari

Microsoft Edge is not recommended for use because issues may occur. For details, see *System Requirements for Acumatica ERP 2020 R1*.

Acumatica ERP is a role-based system. Depending on the role or roles (such as *Accountant* or *Marketing manager*) the system administrator has assigned to your user account in the system, you will be able to view and work with particular companies, branches, workspaces (which contain particular Acumatica ERP entities, such as forms and reports), and menu items within workspaces.

To access the system, you can use an account of any of the following types:

- An Acumatica ERP account: You use the user name and password that the system administrator has created for you in Acumatica ERP to access the system.

- A domain account: If the system administrator has integrated Acumatica ERP with Microsoft Active Directory, you use your domain login and password (the credentials that you use to sign in to your computer).
- An account of an external identity provider: If the system administrator has configured single sign-on with an external identity provider, such as Google or Microsoft account, you use the credentials of this provider to sign in to Acumatica ERP. For details how to register your Google or Microsoft account, see *To Activate Your Google or Microsoft Account*.

When you have finished working with Acumatica ERP, be sure to save the results of your work and sign out to prevent unauthorized access to the system.

Basic Elements of the Acumatica ERP Sign-In Page

You use the Acumatica ERP Sign-In page to sign in to the system, submit a request for recovering password to your system administrator (if the security policy of your company allows this), and go to the Acumatica ERP official website. The Sign-In page also includes information about the system version and any applied customization projects; these details may be useful to some users under some circumstances, such as during troubleshooting.

The following screenshot shows you the basic elements of the Acumatica ERP Sign-In page.

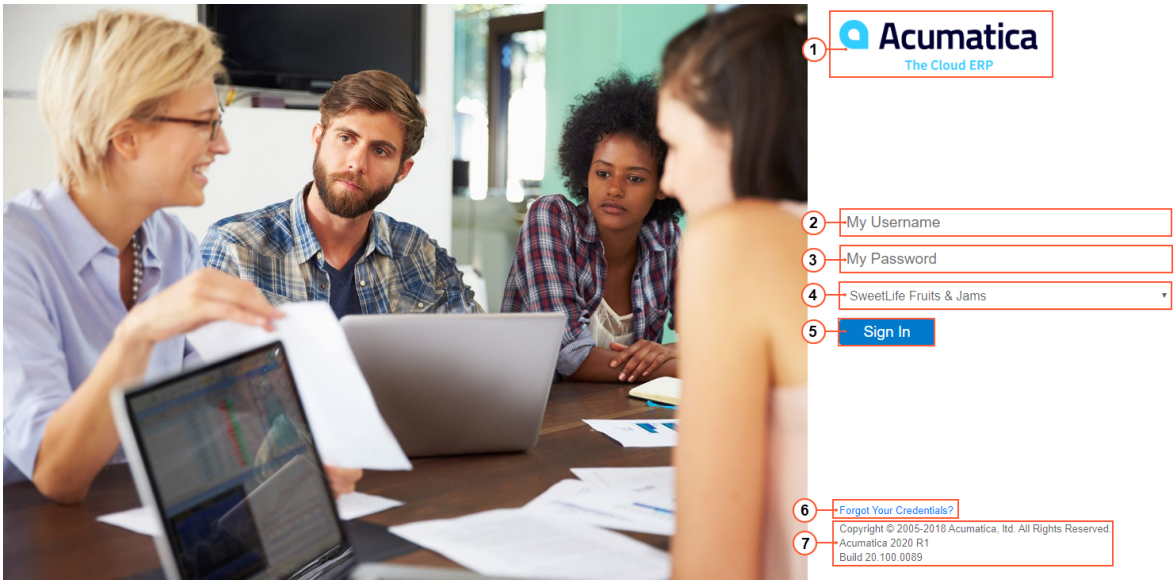

Figure: Basic elements of the Acumatica ERP Sign-In page

The following elements may be visible on the Acumatica ERP Sign-In page:

1. The button with the Acumatica ERP logo. You can click this button to open the Acumatica ERP corporate website in a new browser tab.
2. The **My Username** box.
3. The **My Password** box.

4. The Tenant box. This box is available only if you have access to multiple tenants.
5. The **Sign In** button.
6. The **Forgot your Credentials?** link.
7. The information about the Acumatica ERP version and any applied customization projects.

Tenants in Acumatica ERP

A tenant is a unit that is used for sharing the Acumatica ERP application with other tenants, with each tenant's data isolated from and invisible to the other tenants.

When you sign in to the system, you can select a tenant, if multiple tenants are configured in your Acumatica ERP instance and you have access to those tenants.

When you are working with the system, you can switch between tenants, if multiple tenants are configured in your Acumatica ERP instance and you have access to those tenants.

Companies and Branches in Acumatica ERP

For an organization that has a hierarchical structure of subsidiaries or branches, Acumatica ERP supports multicompany and multibranch functionality.

When you are working with the system, you can switch between the companies and branches to which you have access if multiple companies and branches are configured in your Acumatica ERP instance. To do this, you use the Company and Branch Selection menu, which is described in the next section.

Company and Branch Selection Menu

The Company and Branch Selection menu button is located in the top pane of the Acumatica ERP screen. The button displays the current company or branch (or both), You click the button to view the Company and Branch Selection menu.

The following screenshot shows the elements of the Company and Branch Selection menu.

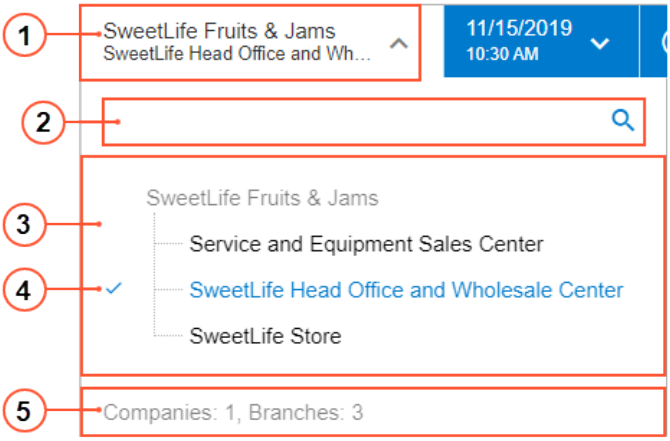

Figure: Company and Branch Selection menu

1. The current company or branch (or both). In the top pane of all Acumatica ERP screens, the system displays the name of the company or branch (or both) to which you are currently signed in. This is also a button you can click to view the Company and Branch Selection menu.

2. The Search box. You use the box to search for a particular company or branch by its name.

3. The list of companies or branches (or both). The system displays the hierarchical list of the companies and their branches (if any) that you have access to.

4. The current branch. The current branch, indicated by a check mark, is inserted by default into any documents or entities you create while you are signed in.

   If you are signed in to a company with no branches, the check mark is instead used to indicate the current company.

5. The total numbers of companies and branches that you have access to.

Accessing Acumatica ERP: Process Activity

The following activity will walk you through the processes of signing in to your Acumatica ERP instance, switching between companies and branches, and signing out of the system.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company, and you are signing in to Acumatica ERP for the first time by using the *Chubb* user account.

Further suppose that you have access to the following branches of the SweetLife Fruits & Jams company:

- Service and Equipment Sales Center

- SweetLife Head Office and Wholesale Center
- SweetLife Store

Process Overview

In this process activity, you will do the following:

1. Sign in to Acumatica ERP for the first time
2. Make sure that you have access to the SweetLife Fruits & Jams branches
3. Switch to the SweetLife Store branch
4. Sign out of Acumatica ERP

System Preparation

Before you sign in to Acumatica ERP, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have one of the recommended web browsers installed on your computer. For details, see *Accessing Acumatica ERP: General Information*.

Step 1: Signing In to the Acumatica ERP Account

To sign in to Acumatica ERP by using the *Chubb* user account of David Chubb, do the following:

1. Open your browser.
2. In the address bar, type the URL of your Acumatica ERP instance and select Enter. The Acumatica ERP Sign-In page opens.
3. In the **My Username** box, type `chubb`.
4. In the **My Password** box, type `123`.
5. Click **Sign In**. The home page of your Acumatica ERP instance opens.

Step 2: Switching Between Companies and Branches

To make sure that you have access to the SweetLife Fruits & Jams company and its branches, do the following:

1. In the top pane of the Acumatica ERP screen, click **SweetLife Fruits & Jams** to open the Company and Branch Selection menu.
2. On the menu, view the list of the companies and branches, and be sure it includes the **SweetLife Fruits & Jams** company and the following branches of it: **Service and**

Equipment Sales Center, **SweetLife Head Office and Wholesale Center**, and **SweetLife Store**. Notice the check mark left of the current branch—the branch to which you are currently signed in.

3. Click **SweetLife Store** to switch to the SweetLife Store branch of the SweetLife Fruits & Jams company. The system closes the Company and Branch Selection menu. On the top pane, you can see the **SweetLife Store** branch.

4. Click **SweetLife Fruits & Jams** to open the Company and Branch Selection menu. Notice a check mark left of the **SweetLife Store** branch, which means that it is your current branch.

   If you switch to a company without branches, the check mark appears left of the company instead of the branch.

Step 3: Signing Out of Acumatica ERP

To sign out of Acumatica ERP, do the following:

1. In the right part of the top pane, click the User menu button (where your user name appears).

2. On the User menu, which opens, click **Sign Out**. The Acumatica ERP Sign-In page is displayed.

Lesson 2: Learning About the Acumatica ERP UI

Learning About the Acumatica ERP UI: General Information

In the following sections, you will find information about the user interface (UI) and the navigation options of the Acumatica ERP website.

Learning Objectives

In this chapter, you will learn how to do the following:

- Identify the basic elements of the Acumatica ERP UI
- Describe the main functions of the basic UI elements
- List the content that can be displayed in the working area
- Describe the elements of a workspace
- Search for needed information in the system
- Navigate the Help menu
- Explore the Acumatica ERP online Help

Applicable Scenarios

You need to learn about the Acumatica ERP UI in either of the following cases:

- You are new to Acumatica ERP and need to become familiar with the UI.
- You have stopped using the classic UI of Acumatica ERP (it is no longer provided in current product versions), and need to explore the current UI.

Basic Elements of the Acumatica ERP User Interface

Every screen of Acumatica ERP has basic UI elements that help users navigate the system, input data into the system, and view, modify, and share information. The following screenshot shows the basic UI elements of the system, which are described in the next several sections.

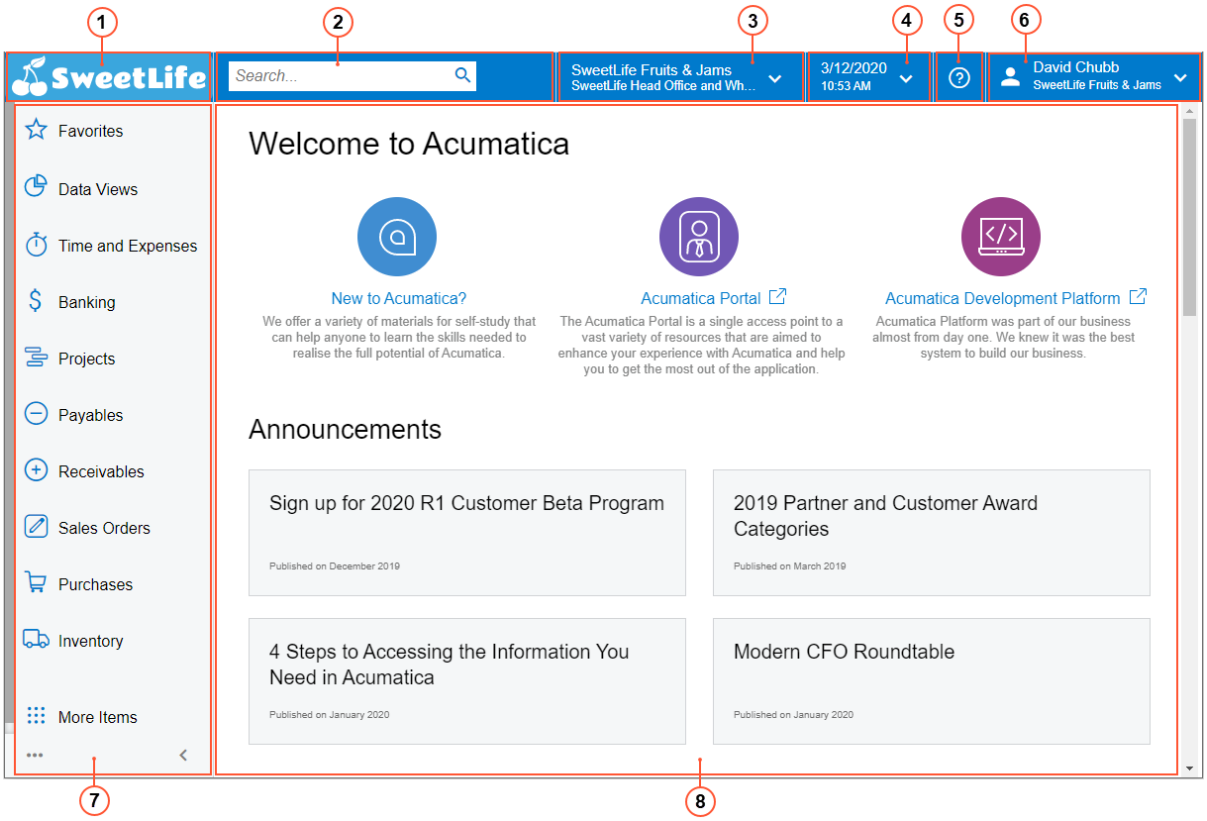

Figure: Basic UI elements

1. Home button
2. Search box
3. Company and Branch Selection menu button
4. Business Date menu button
5. **Open Help** button
6. User menu button
7. Main menu
8. Working area

Home Button

The Home button is located in the upper left corner of the Acumatica ERP screen. The Home button has your company logo on it. When you click the Home button, the home page of your Acumatica ERP instance opens.

You can specify a custom home page instead of the default home page. For details, see *Managing Your Basic Working Environment: Process Activity*.

Search Box

The Search box is located in the top pane of the Acumatica ERP screen. When you search by a keyword or phrase in the system, the results may include any of the following:

- A text string in menu items, such as forms, reports, dashboards, pivot tables, and generic inquiries
- Help topics
- Files and notes attached to system records
- Transactions
- Documents
- Entities, such as vendors, customers, prospects, employees, leads, and cases.

Additionally, you can search for a form by the form title and by the form ID.

You can find a form or report by using the Search box, if the link to this particular form or report has been added to any of the workspaces. If you cannot find the form that you need for your work, contact a system administrator.

Company and Branch Selection Menu

The Company and Branch Selection menu button is located in the top pane of the Acumatica ERP screen. The button displays the current company or branch (or both), You click the button to view the Company and Branch Selection menu.

The following screenshot shows the elements of the Company and Branch Selection menu.

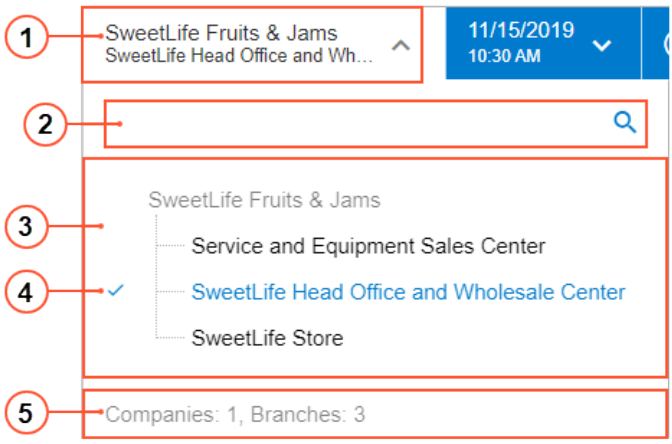

Figure: Company and Branch Selection menu

1. The current company or branch (or both). In the top pane of all Acumatica ERP screens, the system displays the name of the company or branch (or both) to which you are currently signed in. This is also a button you can click to view the Company and Branch Selection menu.
2. The Search box. You use the box to search for a particular company or branch by its name.
3. The list of companies or branches (or both). The system displays the hierarchical list of the companies and their branches (if any) that you have access to.
4. The current branch. The current branch, indicated by a check mark, is inserted by default into any documents or entities you create while you are signed in.

   If you are signed in to a company with no branches, the check mark is instead used to indicate the current company.

5. The total numbers of companies and branches that you have access to.

Business Date Menu

The Business Date menu button is located in the top pane of the Acumatica ERP screen; the button shows the current business date and time (in the time zone defined for your user account) in the system. The following screenshot shows the elements of the Business Date menu.

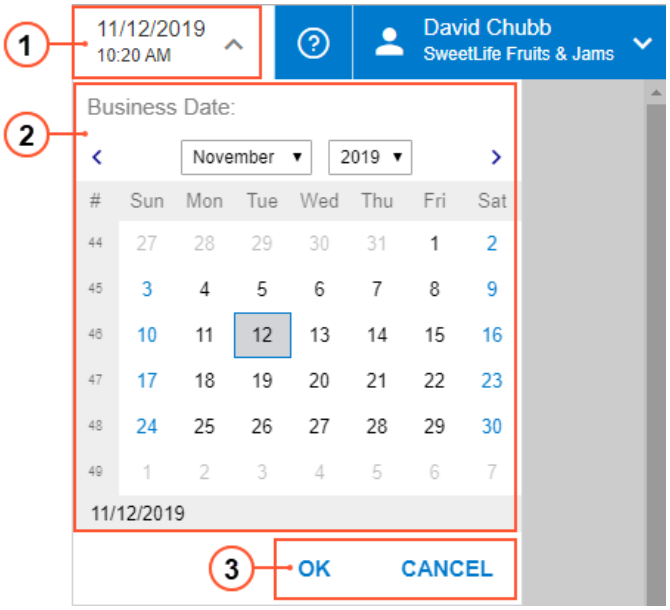

Figure: Business Date menu

1. Business Date menu button
2. Calendar

3. Action buttons

The business date, which is the current date that is set in the system, is automatically inserted in the records that you add to the system.

If the *Secure Business Date* feature is disabled on the *Enable/Disable Features (CS100000)* (CS100000) form in Acumatica ERP, any user can change their business date by opening the Business Date menu and then selecting the needed date. If the *Secure Business Date* feature is enabled, only users with the *BusinessDateOverride* role assigned to them can change the business date.

This menu also displays a calendar, which can be used to find the needed business date (and select it, if the system settings allow this), and the **OK** and **Cancel** buttons.

Built-In Help System

You click the **Open Help** button, located in the top pane of the Acumatica ERP screen, to access the Help menu. The menu provides quick access to Help topics that are relevant to the content you are currently viewing in the working area. The following screenshot shows the elements of the Help menu.

When you click the **Open Help** button, one of the following occurs:

- For most of the menu items, the Help menu opens, offering a collection of relevant links, as shown in the following screenshot.
- For a custom form, report, or dashboard, the **Educational Resources** Help dashboard opens in a new browser tab.
- In some cases, a reference Help topic related to the form opens in a new browser tab.

If you want to open a Help topic in the working area, you should select Ctrl and click the link to the Help topic.

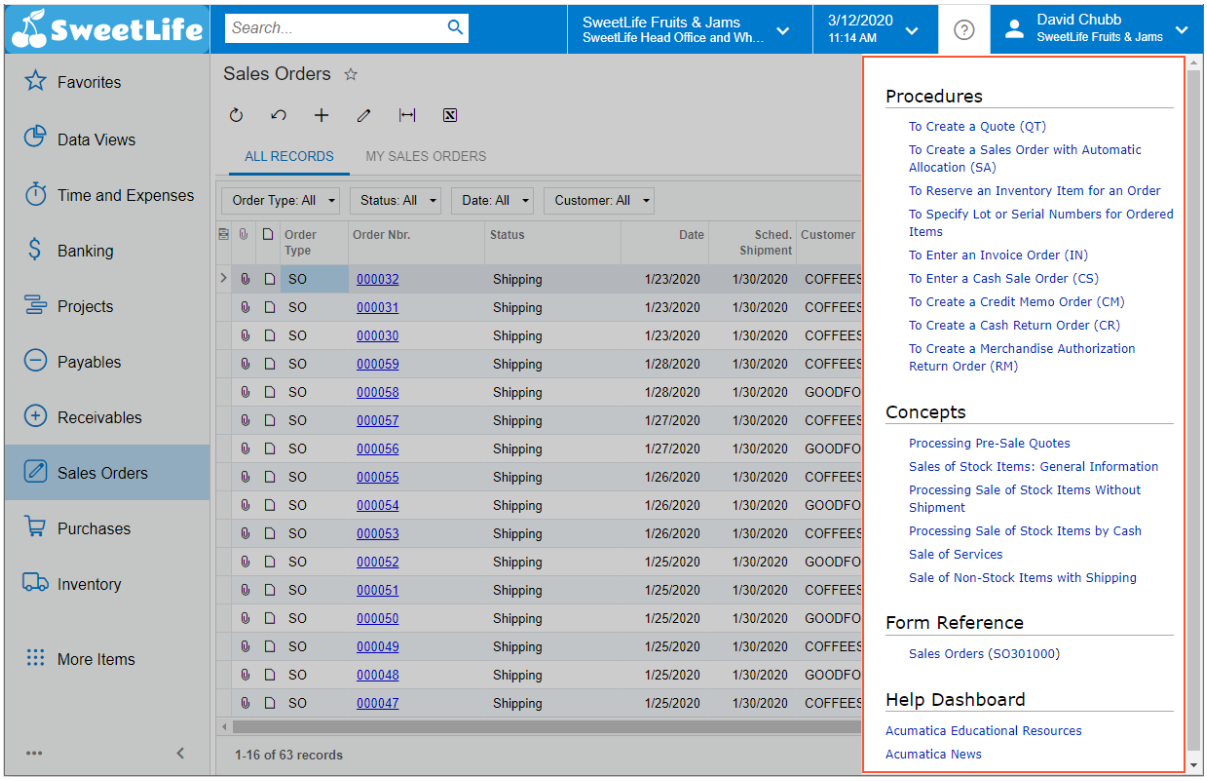

Figure: Help menu

In the **Help Dashboard** section of the Help menu, you can click *Acumatica Educational Resources* to open the **Educational Resources** Help dashboard.

By using the Help dashboard, you can access the Help system of your Acumatica ERP version and view a complete list of the available guides and reference collections. You can navigate among these guides and the included topics to find more information on a particular subject or just to learn more about Acumatica ERP.

User Menu

The User menu button is located in the top pane (upper right) of the Acumatica ERP screen; you click the button to view the User menu. The following screenshot shows the elements of the User menu.

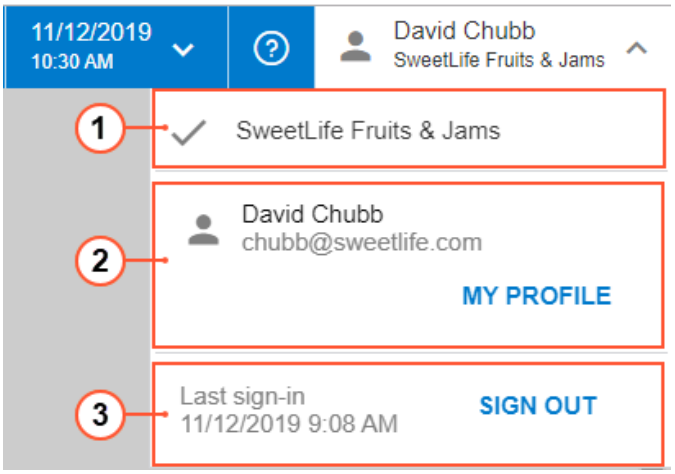

Figure: User menu

1. Tenants section. In this section of the User menu, you can view the tenant to which you are signed in, indicated by a check mark.

2. My Profile section. This section shows your name as defined in the system and your email address; you click **My Profile** to view the *User Profile* (SM203010) form, where you can change the settings of your user account.

3. Sign-In section. In this section of the User menu, you can view the date and time of your last sign-in, and click **Sign Out** if you are ready to sign out of the system.

Main Menu

The main menu is located on the left side of the Acumatica ERP screen. You can collapse the main menu so that the names of the menu items are hidden or minimize the main menu so that it is displayed as the **Menu** button in the upper left corner of the screen instead of the Home button. The following screenshot shows the elements of the main menu.

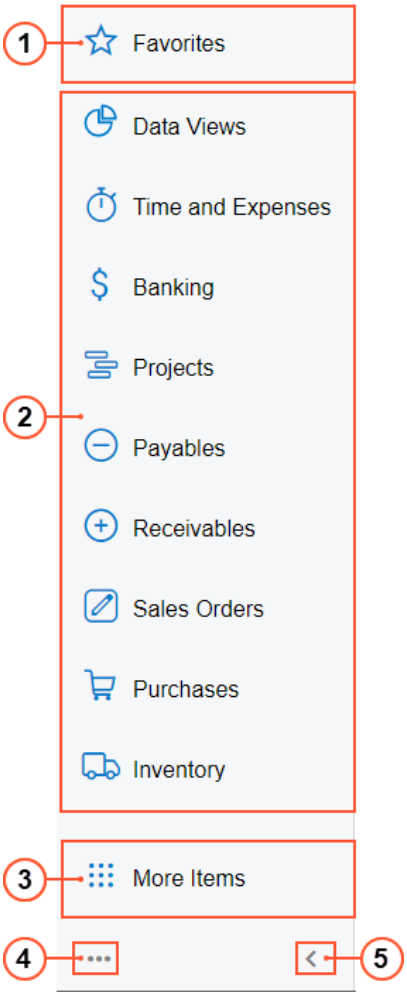

Figure: Main menu

1. **Favorites** menu item. You click the **Favorites** menu item to view your favorite forms, reports, and dashboards. For details, see *Managing Favorites*.

2. Menu items representing workspaces. When you click a menu item on the main menu, the workspace **Quick Menu** or **Full Menu**, depending on the configuration of the workspace, opens over the working area. In the workspace, you can see the links to the forms, reports, and dashboards for a particular functional area in Acumatica ERP.

3. **More Items** menu item. The main menu displays the workspaces that are used most commonly by Acumatica ERP users. By clicking the **More Items** menu item, you can access some workspaces that are used less frequently but important in some jobs. If you do not see a menu item corresponding to the functional area you want to use, click the **More Items** menu item. This opens in the working area a menu of the form with tiles for each of the workspaces in the system. These workspaces are grouped by broader functional areas.

4. **Open Configuration Menu** button. You click this button to view a menu with additional commands that you can click to change the location of the main menu (and to edit the menu items in the whole system, if you are signed in to an account with the *Administrator* role assigned).

5. **Collapse Main Menu Panel** (or **Expand Main Menu Panel**) button. By clicking the **Collapse Main Menu Panel** button, you can collapse the main menu panel so that it displays only icons, and by clicking the **Expand Main Menu Panel** button (which appears on the collapsed menu panel), you can expand the panel to the full width.

Working Area

The working area is the main area of the Acumatica ERP screen. Depending on what you are doing in the system, the working area may display any of the following:

- A form: Acumatica ERP has forms of multiple types. For details, see *Forms*.
- A report: A report is a type of a form specifically designed to organize data in a ready-to-print format. For details, see *Reports*.
- A dashboard: A dashboard is a collection of widgets, displayed on a single page, that provide at-a-glance information on your business specific processes. For details, see *Dashboards*.
- A Help topic.

Workspaces

In Acumatica ERP, a workspace is a menu that displays links to forms, reports and dashboards of a particular functional area. The following screenshot shows the basic elements of a workspace.

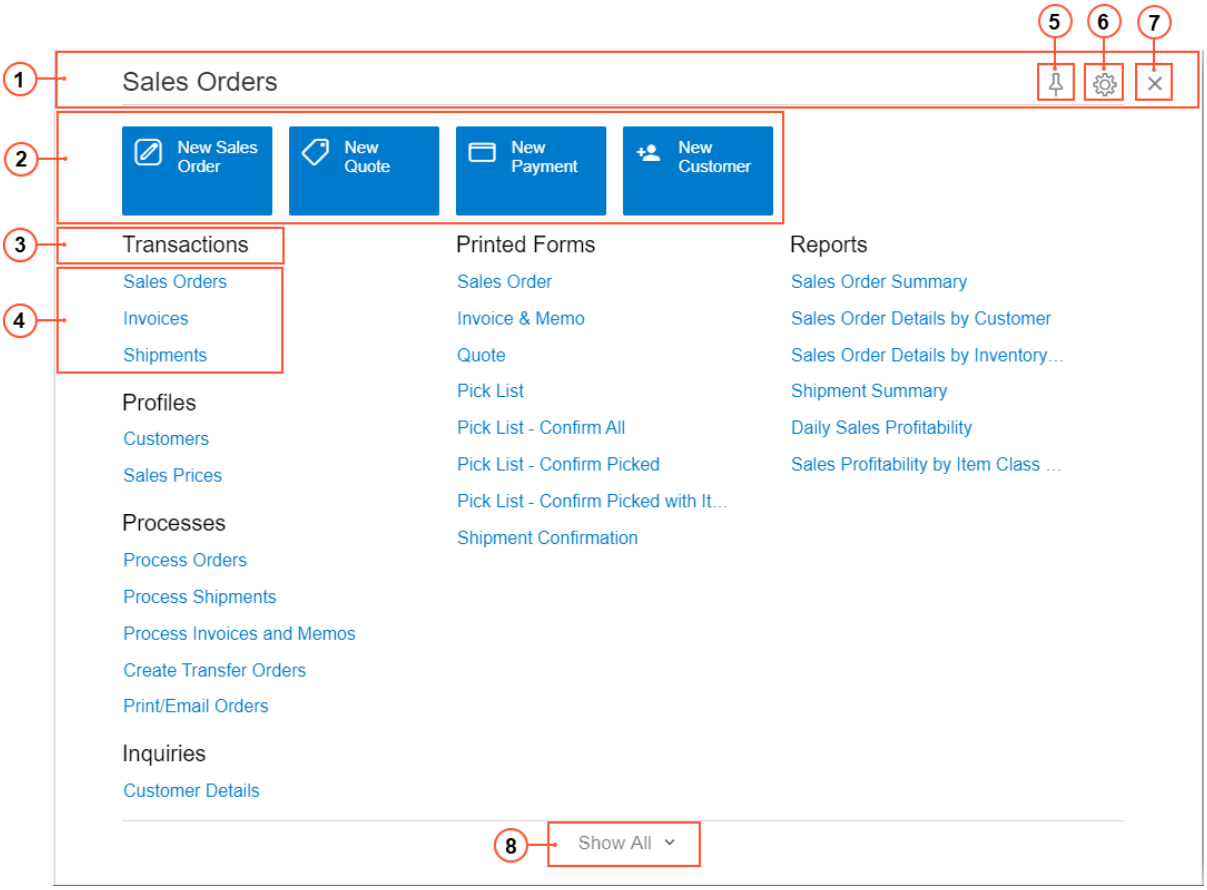

Figure: Workspace elements

1. Workspace title bar. The workspace title bar has the title of the workspace, and buttons you can use to invoke various workspace-specific actions.

2. Tiles. A tile is a shortcut in a workspace that you click to open a form, report, or other workspace item (possibly with predefined settings, depending on how the workspace has been configured). A predefined workspace contains tiles with the most popular workspace items for the functional area.

3. Category. In each workspace, categories—such as **Transactions**, **Processes**, **Inquiries**, **Profiles**, and **Reports** in the **Sales Orders** workspace shown in the previous screenshot—are used to group these links by type, which makes items easier to find. For example, the **Transactions** category displays links to items that you can use to process transactions. Depending on the workspace, the set of categories may vary. The system provides a number of predefined categories. A category is displayed in a workspace if at least one link to a menu item has been added to the category in this workspace.

4. Links to workspace items, which you can click to navigate to various workspace items, such as forms, reports, dashboards, generic inquiries, or pivot tables.

5. The **Unpin From Main Menu** button, which you can click to remove the workspace from the main menu. If the workspace is not displayed on the main menu, you can see the **Pin to Main Menu** button, which you can click to add the workspace to the main menu.
6. The **Configure Quick Menu** button, which you can click to open the workspace in configuration mode and select links to workspace items to be displayed in the quick view of the workspace.
7. The **Close Workspace** button, which you can click to close the workspace.
8. The **Show All** (or **Show Less**, if the workspace is displayed in the full view, as described in the next section) button, which is on the workspace footer. You use these buttons to toggle between the workspace views.

Views of the Workspace

A workspace in Acumatica ERP can have the following views:

- Full view (the **Show All** button is displayed in the workspace footer)
- Quick view (the **Show Less** button is displayed in the workspace footer)

The full menu view of the workspace contains all the tiles and links to menu items defined for the workspace, with the links grouped by categories.

The quick menu view of the workspace contains the most commonly used tiles of the particular workspace, as well as the links to menu items, which are grouped by categories.

Learning About the Acumatica ERP UI: Process Activity

The following activity will help you identify the basic elements of the Acumatica ERP user interface and use these elements to navigate through the system.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. You have signed in to your Acumatica ERP instance for the first time and you would like to become familiar with the UI before you start setting up your working environment to meet your preferences.

Prerequisites

You should learn how to sign in to Acumatica ERP; you need to be signed in to gain hands-on familiarity with the user interface. For details, see *Accessing Acumatica ERP: Process Activity*.

Process Overview

When you have signed in to Acumatica ERP, you should do the following:

1. View the basic UI elements

2. Explore the main menu
3. Explore the workspaces
4. Search for the information related to customers in Acumatica ERP
5. Explore the Help system

System Preparation

Before you start getting familiar with the basic elements of Acumatica ERP, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* data set, or a system administrator has performed this task for you.
- A system administrator has built the full-text search index for your Acumatica ERP instance, if applicable. For details, see *To Build Search Indexes*.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.

Step 1: Exploring the Main Menu and the Ways to Display It

On the left side of the Acumatica ERP screen, you can see the main menu and its menu items, each of which represents a functional area of the system. Suppose that you would like to experiment with ways you can place the main menu on the screen, to see which fits your preferences.

To change the appearance of the main menu in various ways, do the following:

1. In the lower part of the main menu, click (the **Collapse Main Menu Panel** button) to hide the names of the main menu items.

   With the main menu collapsed, notice that there is more space for the main area on the screen. This can be a beneficial way to display the main menu for users who are familiar with the icons of the main menu and would rather view a larger working area.

2. Click (the **Expand Main Menu Panel** button) to show the names of the main menu items and an expanded main menu panel again.

3. Click (the **Open Configuration Menu** button) to open the additional configuration menu.

4. On the configuration menu, click **Collapse to Top**. The main menu is displayed as the **Menu** button in the upper left corner of the screen, where the **SweetLife** logo was previously displayed.

5. Click the **Menu** button to display the main menu panel again.

6. Click ··· to open the additional configuration menu.

7. On the configuration menu, click **Expand to Left**. The expanded main menu is displayed left of the working area again. The **SweetLife** logo is again displayed in the top left of the screen.

Now that you have seen the different ways the main menu can be displayed, you can display it in ways that fit your working style and make changes as needed.

Step 2: Viewing the Initial List of Workspaces

To view on the main menu the initial list of workspaces, do the following:

1. Make sure that the main menu is expanded so that you can see the names of the menu items, which correspond to the names of predefined workspaces.

2. View the names of the workspaces that are displayed on the main menu, using the scroll bar on the left as needed to see all of them. By default, on the main menu, you can see the following menu items:

   - **Favorites**
   - **Data Views**
   - **Time and Expenses**
   - **Banking**
   - **Projects**
   - **Payables**
   - **Receivables**
   - **Sales Orders**
   - **Purchases**
   - **Inventory**
   - **More Items**

You can click any of these menu items to view the workspace and become familiar with its content, as you will do in the next step. This will give you an idea of which workspaces might be most suitable to your job tasks.

Step 3: Exploring a Workspace

Suppose that you would like to explore the menu items that are related to sales orders, which are organized in the **Sales Orders** workspace. These items are most commonly used forms and reports, but may also be dashboards, pivot tables, and generic inquiries.

To explore the **Sales Orders** workspace, do the following:

1. On the main menu, click the **Sales Orders** menu item. Over the working area, the **Sales Orders** workspace opens. View the elements of the workspace: the title, the tiles in the workspace, the categories, the links to menu items within the categories, and the workspace view that is currently being displayed. If the quick workspace view is displayed, you can see the **Show All** button on the workspace footer, and if the full workspace view is displayed, you can see the **Show Less** button on the workspace footer,

2. In the **Transactions** category, click the *Invoices* link to open the form. The list of invoices opens.

3. On the main menu, click the **Sales Orders** menu item to return to the **Sales Orders** workspace.

4. On the workspace footer, click the **Show All** button to view all the links to menu items within the categories that can be displayed in the workspace.

5. Click the **Show Less** button to return to the quick view of the workspace,

6. On the workspace title bar, click the **Close Workspace** (×) button to close the **Sales Orders** workspace.

You have explored the **Sales Orders** workspace to get an idea of what it contains and how you can open a form listed in it.

Step 4: Configuring the Quick Menu of a Workspace

Suppose that your job responsibilities include analyzing sales profitability and you need to regularly use the *Sales Profitability Analysis* (AR409000) report. The predefined quick view of the **Sales Orders** workspace does not include the link to this report.

To add the link to the *Sales Profitability Analysis* report to the quick view of the **Sales Orders** workspace, do the following:

1. On the main menu, click **Sales Orders** to open the **Sales Orders** workspace.

2. On the workspace title bar, click the **Configure Quick Menu** (⚙) button. The workspace opens in configuration mode: you can see the **Sales Orders: Configuration** title of the workspace and check boxes left of the links to menu items, such as forms, reports, and dashboards, that are available in the workspace.

3. In the **Reports** category, select the check box left of the link to the *Sales Profitability Analysis* report.

4. On the workspace title bar, click the **Exit** button. The **Sales Orders** workspace opens in view mode again. Each time you open this workspace, in the **Reports** category, you will see the link to the *Sales Profitability Analysis* report.

You have added the link to the *Sales Profitability Analysis* report to the quick view of the **Sales Orders** workspace and you do not need to switch to the full view to open this report.

Step 5: Adding a Predefined Workspace to the Main Menu

Suppose that your job responsibilities as sales manager include registration and tracking of customer requests, and providing feedback to the customers. For example, you often need to quickly access the *Cases* (CR306000) form to create, check, or update cases. This form and others related to cases are available in the **Support** workspace, which is a predefined workspace in Acumatica ERP but not one that is initially among the menu items listed on the main menu.

To add the **Support** workspace to the main menu, do the following:

1. On the main menu, click the **More Items** menu item. The system displays over the working area a menu of the form with tiles for each of the workspaces in the system, grouped by their broader functional areas.
2. Point at the **Support** tile (under **Operations**), and click the Pin ( ) button. The **Support** menu item is added (that is, pinned) to the main menu.
3. On the main menu, click the **Support** menu item. Over the working area, the **Support** workspace opens: the links that are related to support are displayed.

You have added the **Support** menu item to the main menu.

Step 6: Removing a Workspace from the Main Menu

Suppose that your job responsibilities do not include working with projects and you do not need the **Projects** menu item on your main menu. You can remove the **Projects** menu item from the main menu. It will still be available if you click **More Items**, and your changes will not affect other users' view of the main menu.

To remove the **Projects** workspace from the main menu, do the following:

1. On the main menu, click the **Projects** menu item. The **Projects** workspace opens over the working area.
2. On the workspace title bar, click the **Unpin From Main Menu Panel** ( ) button. On the main menu, notice that the **Projects** menu item is no longer displayed.
3. On the workspace title bar of the **Projects** workspace, click the **Close Workspace** ( ) button to close the workspace.

You have removed the **Projects** menu item from the main menu.

Step 7: Exploring the Universal Search Capabilities in Acumatica ERP

Suppose that you would like to explore all the forms and files in Acumatica ERP that may contain information about customers, as well as the list of Help topics related to customers.

To search for information related to customers, do the following:

1. In the Search box, located in the top pane of the Acumatica ERP screen, type `customer`. The Search form opens. On the **Menu Items** tab, scan the menu items that have the *customer* keyword in their names; if you point at any of the items' names, the identifier (ID) of the item is also shown (for example, if in the **Profiles** category, you point at the **Customers** menu item, you can see the *AR3030PL* ID).

   In this context, *menu item* refers to any item for which a link can be included in a workspace: a form, a report, a dashboard, a generic inquiry, or a pivot table.

2. On the **Transactions and Profiles** tab, scan the list of transactions and customer profiles that contain the *customer* keyword.

   If the **Transactions and Profiles** tab does not contain any search results, make sure that the full-text search index for your Acumatica ERP instance has been built. For details, see *To Build Search Indexes*.

3. On the **Help Topics** tab, scan the list of the Help topics that contain the *customer* keyword.

4. On the **Files** tab, scan the list of the files that have the *customer* keyword in their names.

5. In the upper right corner, click the Close Workspace button to close the Search form.

You have explored the types of information that you can find by using the universal search capabilities in Acumatica ERP and the way you perform this search.

Step 8: Exploring the Built-In Help System

Suppose that you will be creating sales orders. You open an existing sales order on the *Sales Orders* (SO301000) form to become familiar with the form layout and the information that is included, and you are wondering how to correctly fill in the **Requested On** box of the form.

To locate the information by using the Help menu and the Help system, do the following:

1. On the main menu, click **Sales Orders**. The **Sales Orders** workspace opens.

2. In the **Transactions** category, click **Sales Orders**. The list of sales orders opens.

3. In the **Order Nbr.** column, click any link to open a sales order. The *Sales Orders* (SO301000) form opens with the sales order you selected.

4. In the top pane of the screen, click the **Open Help** button. The Help menu opens, displaying links to Help topics that are related to sales orders.

5. In the **Form Reference** section of the Help menu, click *Sales Orders (SO301000)* to search for details about the **Requested On** box of the form. The *Sales Orders* Help topic opens in a new tab of the web browser.

6. In the table of contents of the topic, click the link for the *Summary Area* section of the topic, which corresponds to the part of the form with the box.

7. In the section, read the description of the **Requested On** element.

You have found out the information about the expected setting in the **Requested On** box of the *Sales Orders* (SO301000) form.

Lesson 3: Searching in Acumatica ERP

Searching in Acumatica ERP: General Information

In the following sections, you will get to know how the Acumatica ERP universal search capabilities help you find needed information.

Learning Objectives

In this chapter, you will learn how to do the following:

- Search for a profile, such as a customer or stock item record defined in the system
- Search for a specific menu item, such as a form of any type or a report
- Search for a specific transaction, such as an invoice or a GL (General Ledger) transaction
- Search for a file attached to a record
- Search for a Help topic

Applicable Scenarios

You search across the system for specific data in any of the following cases:

- You need to quickly find a form or report by its name or ID (identifier).
- You need to find a dashboard.
- You need to find a particular transaction or profile created in the system by its reference number or keyword, such as customer name.
- You need to look up the information about a particular Acumatica ERP record in a Help topic.
- You need to find a particular file attached to a record.

Universal Search

With the Acumatica ERP universal search, you can quickly find particular data in the system.

The Search box is located in the top pane of the Acumatica ERP screen. When you type a keyword or phrase in the Search box (or copy the keyword or phrase and paste it into the box), the results found in the system may include any of the following:

- Menu items, such as forms, reports, dashboards, pivot tables, and generic inquiries
- Help topics
- Files and notes attached to system records

- Transactions
- Documents
- Profiles, such as vendors, customers, prospects, employees, leads, and cases

You can also search for a form or report by its title or ID.

You can find a form or report by using the Search box, if the link to this particular form or report has been added to any of the workspaces. If you cannot find the form that you need for your work, contact a system administrator.

The system searches for all matches of the keyword or phrase that you have entered in the Search box. On the tabs of the Search form, the system then lists all the search results that contain at least one match of the keyword or phrase.

The system narrows the search results based on your access rights. If you do not have access rights to particular data (such as vendor accounts), the data does not appear in the search results, even though the results match the search criteria. Your access rights to files that are attached to records are determined by your access rights to these records and to the forms where these records are created.

Search Form

To start a search, you type a keyword or phrase in the Search box or copy the keyword or phrase and paste it into the box. The system opens the Search form. The Search form overlaps the form, report or dashboard that is opened in the working area when you start your search. The following screenshot shows the basic elements of the Search form.

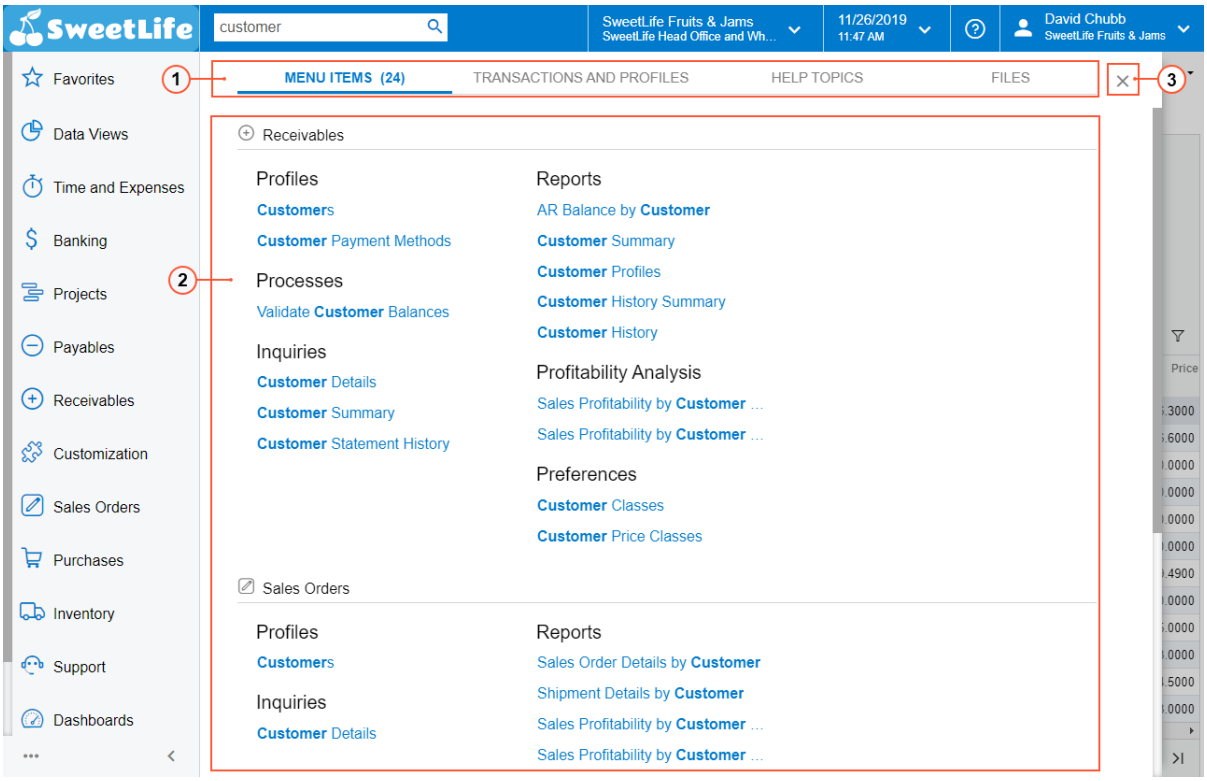

Figure: Search form

1. The tabs of the Search form, which are described in the next section
2. The search results for the selected tab
3. The Close button; when you close the Search form, you go back to the form, report, or dashboard that was opened when you started your search

Tabs of the Search Form

When you type your search string in the Search box, the system displays the search results on the following tabs of the Search form:

- **Menu Items**: On this tab, you can view the links to forms or reports with the search string in their name or ID.
- **Transactions and Profiles**: On this tab, you can view the following:
  - If the search string you type is a reference number or ID, the list of documents and transactions—such as invoices, sales orders, journal transactions, and shipments—identified by the reference number or ID. Entering a reference number or ID is the only way you can find a particular document through the Search form.
  - If the search string you type is a keyword, partial keyword, or phrase, the list of profiles—such as customers, employees, companies, and stock items—with the search string in their names. Also, the descriptions of transactions and profiles

are searched for the search strings and transactions are listed on this tab if their descriptions contain the search string.

- **Help Topics**: This tab lists Help topics of the Help system that contain the search string in their name or content. You can click the link to a Help topic to open the topic in a new browser tab.
- **Files**: On this tab, you can view the list of the files attached to records that contain the search string in their name.

Search Tips

You can search for a data entry form by typing or copying in the Search box either of the following:

- The name of the form, such as *Sales Orders*, *Customers*, or *Employees*
- The form ID, such as *SO301000*, *AR303000*, or *EP203000*

On the **Menu Items** tab of the Search form, the system displays the link to the list of the records (such as sales orders, customers, or employees) that have been created using the data entry form whose name or ID you typed.

To open a particular record, in the list of records, you click the ID of the record. If a list of record contains more than one page, you should first search for the record you need and then click the ID of the record. For details, see *Searching in Acumatica ERP: Process Activity*.

You can search for a particular document or transaction by entering in the Search box the reference number of the document or transaction, such as sales order *000029* or invoice *00056*. The system displays the link to the record that you are searching for on the **Transactions and Profiles** tab of the Search form. When you click the link, the particular form of the record opens with that record selected.

Searching in Acumatica ERP: Process Activity

The following activity will help you find specific information that you are searching for in Acumatica ERP.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. Your colleague who works with the customer FourStar Coffee & Sweets Shop has gone on vacation. Your manager called you and asked for some information on the customer and suggested that you use “the Customer History Summary report”. You are not yet familiar with this report.

You need to find out the following information about FourStar Coffee & Sweets Shop:

- The customer address
- The invoice with the largest amount for goods sold in January 2020

- The status of the invoice with the reference number *000064*
- The date and number of the customer's scanned purchase order (a file), which the sales order *000063* is based on
- The data presented in the *Customer History Summary* (AR652100) report

Process Overview

In this process activity, you will do the following:

1. Conduct your first search and view the search results
2. Search for a customer profile by the name of the customer
3. Search for a record in a list of records
4. Search for the invoice by its reference number
5. Search for a file that is attached to a sales order
6. Search for the information in a Help topic

System Preparation

Before you start searching for the needed information in Acumatica ERP, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- A system administrator has built the full-text search index for your Acumatica ERP instance, if applicable. For details, see *To Build Search Indexes*.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.

Step 1: Conducting a Search

Suppose that you want to practice conducting a search, to become familiar with the steps involved.

To conduct a search for the word *employee*, do the following:

1. In the Search box, type `employee`. You may need to wait for a moment until the system completes the search. When the search is complete, the **Menu Items** tab of the Search form opens with the search results.

When you type a keyword or phrase in the Search box (or copy it into the box), you should not select Enter. Selecting Enter results in the system switching to the next tab of the Search form (the **Transactions and Profiles** tab). This may be inconvenient if you are searching for a form, report, or dashboard because these search results are displayed on the **Menu Items** tab of the Search form, which opens by default if you do not select Enter.

2. View the search results, if any, on the various tabs. The Search form displays the following information:

- On the **Menu Items** tab, forms and reports that have the *employee* keyword in their names
- On the **Transactions and Profiles** tab, records that have the *employee* keyword in their names and descriptions and notes (attached to records)
- On the **Help Topics** tab, Help topics that have the *employee* keyword in their names or their content
- On the **Files** tab, files that have the *employee* keyword in their names

- When you click a particular link on the **Menu Items**, **Transactions and Profiles** or **Files** tab, a form opens. If you would like to again view your search results, you should start the search again. When you click a particular link on the **Help Topics** tab, a Help topic opens in a new browser tab.
- For documents, transactions, profiles, Help topics, and files, if the list of the search results is longer than one page, you can see the **Next** button at the lower part of the Search form.

Step 2: Searching for a Customer Profile

To search for a customer profile, do the following:

1. In the Search box, type `fourstar`. The Search form opens.

2. On the **Transactions and Profiles** tab, click *Customer: FourStar Coffee & Sweets Shop*. The *Customers* (AR303000) form opens with this customer selected.

3. On the **General Info** tab of the form, find the **Main Address** section. You can view the customer address here.

Step 3: Searching for a Record in a List of Records

To search for an invoice in the list of invoices, do the following:

1. In the Search box, type `SO303000`, which is the ID of the *Invoices* (SO303000) form. The Search form opens.

2. In the **Transactions** category of the **Menu Items** tab, click *Invoices*. The list of invoices that have been created on the *Invoices* form opens with this invoice selected.

3. In the **Customer** column, click any row that has the value *COFFEESHOP*.
4. Select Shift+F to display the invoices with *COFFEESHOP* in the **Customer** column.
5. In the list of the invoices for FourStar Coffee & Sweets Shop, notice the highest amount in the **Amount** column and the date in January 2020.

Step 4: Searching for an Invoice by Its Reference Number

To search for the needed invoice by its reference number, do the following:

1. In the Search box, type `000064`. The Search form opens.
2. On the **Transactions and Profiles** tab, click *Invoice: 000064 - FourStar Coffee & Sweets Shop*. The *Invoices* (SO303000) form opens. In the Summary area (which is located under the form title bar and the form toolbar), notice the value in the **Status** box: *Closed*.

You can search for any document or transaction by its reference number in this way.

Step 5: Searching for a File Attached to a Record

Now you need to search for the scanned purchase order from *FourStar Coffee & Sweets Shop*, which is attached to the sales order with the reference number *000063*.

To search for a file attached to a record, do the following:

1. In the Search box, type `000063`. The Search form opens.
2. On the **Files** tab, click *Sales Orders (IN 000063)\PO_Four_Stars_Coffee_Sweets_Shop.pdf*. The *File Maintenance* (SM202510) form opens with this file selected. Notice that one version of the file is listed in the table of the form.
3. On the table toolbar, click **View Selected Version**. The file is downloaded to your computer.

   If multiple versions of the file are listed, you need to first click the row with the needed version.

4. Open the file and view the details. As mentioned, you need to find the date and number of this scanned purchase order.

Step 6: Searching for a Help Topic

Suppose that you need to run the *Customer History Summary* (AR652100) report on the customer *FourStar Coffee & Sweets Shop*. Before running this report, you want to find the description of the report as a whole and the parameters you select before running the report.

To search for this Help topic, do the following:

1. In the Search box, type `customer history summary`. The Search form opens.

2. On the **Help Topics** tab, click the *Customer History Summary* link.

   Do not click the link with the report name followed by its number (*Customer History Summary* (AR652100)); this link contains a list of links related to the report rather than being the report reference topic.

   The report reference Help topic for the *Customer History Summary* (AR652100) report opens in a new browser tab. You can read about the description and parameters of the report.

Lesson 4: Filtering and Sorting in Acumatica ERP

Filtering and Sorting in Acumatica ERP: General Information

In the following sections, you will find information about filtering and sorting of data in Acumatica ERP.

Learning Objectives

In this chapter, you will learn how to do the following:

- Recognize the types of filters
- Recall the details of the sorting capabilities
- Identify the basic elements of the filtering area
- Create a simple filter
- Make a quick filter your default filter
- Create a quick filter
- Delete a quick filter

Applicable Scenarios

You use filters in either of the following cases:

- You need to quickly select data according to particular criteria.
- You need to work on a regular basis with data that is selected according to particular criteria.

Filters in Acumatica ERP

When you work with large amounts of data, filtering is a crucial capability of the system that you can use to view and process the data. In Acumatica ERP, you can create and save filters that meet your needs. You can filter data in various forms and reports. For details on using filters in reports, see *Working with Reports*.

All Acumatica ERP filters are form-specific, which means that if a filter is set up for one form, you cannot apply it to another form.

Acumatica ERP provides the following types of filters (which are described in the remaining sections of this topic):

- Simple filter

- Quick filter
- Advanced filter
- Ad hoc filter

A shared filter is one that is available to all users of the system. A user that has access to the *Filters* (CS209010) form can make a quick or an advanced filter and define it to be shared with other users.

For details on applying filters, see *Filtering and Sorting in Acumatica ERP: Process Activity*.

Simple Filters

A simple filter is a filter that you can quickly apply to data in a table, and the filter remains applied while you are on the form. You can also sort data in a table column and turn column sorting on and off. To apply a simple filter, you click the header of the table column to open the Sorting and Filtering Settings dialog box.

In this dialog box, you can do any of the following:

- Specify filtering conditions for the column
- Sort the data in the column
- Cancel the sorting in the column

Once you specify these settings and click **OK** to close the dialog box, the table shows only the table rows that meet the sorting and filtering conditions that you have specified.

Quick Filters

A quick filter is a reusable filter that you can apply to data in the table of the following types of the Acumatica ERP forms (For details, see *Working with Data Entry Forms: General Information*.):

- A generic inquiry form (such as a list of records)
- An inquiry form
- A mass processing form

You can apply one quick filter or multiple quick filters to the data in the table.

To apply a quick filter based on the data in a table column, you do either of the following:

- Drag the header of the column to the filtering area, which causes the system to create a Quick Filter button. You then click the Quick Filter button there and specify conditions for the column in the Sorting and Filtering Settings dialog box, which opens.
- Click the header of the column, and in the Sorting and Filtering Settings dialog box, which opens, specify conditions for the column.

In the Sorting and Filtering Settings dialog box, you select one of the following, based on the content of the column:

- The values of the quick filter if the column has a fixed set of options
- The filter condition of the quick filter if the column has an unlimited number of values

You can save a quick filter for future use. When you save a quick filter, the system adds to the table a tab with the quick filter applied.

You can define a quick filter as a default filter, which means that each time you open the form, the filter tab is automatically opened.

Advanced Filters

An advanced filter is a shared filter defined on the *Filters* (CS209010) form for a processing or inquiry form by a system administrator. The system administrator can configure complex conditions for the advanced filter and apply the filter by default for users. If an advanced filter has been defined for a form, you can apply it anytime. For details, see *Creation of Advanced and Ad Hoc Filters*.

Ad Hoc Filters

An ad hoc filter is a filter that you can set up on a report form to fine-tune the basic report parameters.

You cannot save an ad hoc filter to be reused at a later time. You can, however, set up a report template that contains the filtering and sorting settings of an ad hoc filter, save this template, and reuse it. For more information on ad hoc filters, see *Creation of Advanced and Ad Hoc Filters* and *Working With Data Entry Forms: Process Activity*.

Basic Elements of the Filtering Area

The filtering area is a UI element of the Acumatica ERP form that you can use to set up, configure, and apply filters.

The following screenshot shows the basic elements of the filtering area.

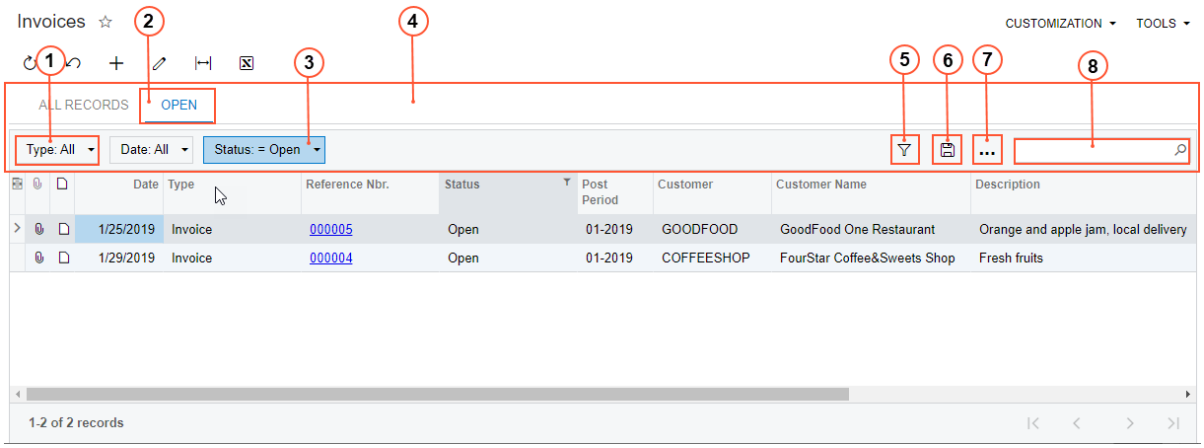

Figure: Basic elements of the filtering area

1. A predefined Quick Filter button, which you can click to open the Sorting and Filtering Settings dialog box, where you can specify conditions for the column.
2. A filter tab.
3. A user-defined Quick Filter button, which you can click to open the Sorting and Filtering Settings dialog box, where you can specify conditions for the column.
4. The filtering area. This area contains the filter tabs, a variety of actions you can invoke, and a Search box.
5. The **Filter Settings** button, which you click to open the dialog box of the same name. In the **Filter Settings** dialog box, you specify the name of the filter configured in the filtering area and save the filter.
6. The **Save** button, which you click to open the **Filter Settings** dialog box, where you specify the name of the new filter and save the filter.
7. The More button, which you can click to invoke menu commands (**Save As**, **Save As Pivot**, and **Remove**) to act upon filters.
8. The Search box of the form.

Filtering and Sorting in Acumatica ERP: Process Activity

The following activity will help you create and apply filters in Acumatica ERP.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. On January 30, 2020, you are starting to work with the GoodFood One Restaurant customer. To learn the details about products ordered by the customer so far in 2020, you

need to find all the sales orders that have been created in January 2020. You also want all the sales orders for this customer to be displayed on a separate filter tab in the list of sales orders.

Process Overview

In this process activity, you will do the following:

1. Create a simple filter
2. Create a quick filter
3. Make a quick filter the default filter for your user account
4. Delete a quick filter
5. Filter data in a table by a selected cell value
6. Turn on and off column sorting in a table

System Preparation

Before you start working with filters in Acumatica ERP, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.

Step 1: Creating a Simple Filter

Suppose that you need to view the list of sales orders that have been created in January 2020.

To create a simple filter, do the following:

1. On the main menu, click **Sales Orders**. The **Sales Orders** workspace opens.
2. In the **Transactions** category of the workspace, click *Sales Orders*. The list of sales orders opens, listing the sales orders that have been created in the system.
3. In the list of sales orders, click the header of the **Date** column.
4. In the Sorting and Filtering Settings dialog box, which opens, do the following:
   a. Select **Is Between** in the list of filter conditions.
   b. In the **From** box, specify *01/01/2020*.

c. In the **To** box, specify *01/31/2020*.

d. At the bottom of the dialog box, click **OK**.
The system closes the dialog box. In the list of sales orders, you can see the sales orders that were created in January 2020.

In the filtering area, you can see the **Date: '1/1/2020' - '1/31/2020'** Quick Filter button. You can save a simple filter as a quick filter, which can be used in future sign-ins; you will do this in the next step.

5. Drag the **Date: '1/1/2020' - '1/31/2020'** Quick Filter button out of the filtering area to delete the simple filter.

Step 2: Creating a Quick Filter

Suppose that as David Chubb, you will regularly need to view all the sales orders for GoodFood One Restaurant and you need an easy way to do this. You will create a quick filter, which is reusable, applied to the data in the list of sales orders. When you save this quick filter, the system will add to the table of sales orders a separate tab with the quick filter applied.

To create this quick filter, do the following:

1. While you are still viewing the list of sales orders, click the header of the **Customer** column. The Sorting and Filtering Settings dialog box opens.

2. In the dialog box, make sure that the **Equals** condition is selected.

3. In the search box at the bottom of the dialog box, enter the customer ID: `GOODFOOD`.

4. Click **OK**. The system closes the dialog box, and the list of sales orders now contains only the sales orders that have been created for GoodFood One Restaurant. In the filtering area, you can see the **Customer:= 'GOODFOOD'** Quick Filter button.

5. In the filtering area, click **Save**.

6. In the **Filter Settings** dialog box, which opens, do the following:

a. In the **Filter Name** box, enter the name of the quick filter: `GoodFood`.

b. Click **OK**.

The system closes the dialog box. In the table, notice the **GOODFOOD** filter tab, which displays all the sales orders for GoodFood One Restaurant.

Step 3: Making a Quick Filter Your Default Filter

Suppose that GoodFood One Restaurant is your main customer. Every time you open the list of sales orders you need to view the **GOODFOOD** filter tab, which lists this customer's sales orders. Thus, you will make this quick filter your default filter.

Because this filter is not shared with other users, it will be the default filter for only your user account.

To make a quick filter your default filter, do the following:

1. While you are still viewing the **GOODFOOD** filter tab of the Sales Orders form, click the **Filter Settings** button. The **Filter Settings** dialog box opens.
2. In the dialog box, do the following:
   a. Select the **Default** check box.
   b. Click **Save**.
   c. Click **Apply**.

   The system closes the dialog box. The **GOODFOOD** filter tab will now be displayed by default every time you open the list of sales orders.

Step 4: Deleting a Quick Filter

Suppose that your manager has assigned the GoodFood One Restaurant customer to another sales manager, so you no longer need the **GOODFOOD** quick filter that you created in Step 2.

To delete the quick filter, do the following:

1. While you are still viewing the **GOODFOOD** filter tab of the list of sales orders, click the **Filter Settings** button. The **Filter Settings** dialog box opens.
2. In the dialog box, do the following:
   a. In the box left of the **Default** check box, make sure that *GoodFood* is selected.
   b. Click **Remove**.
3. In the dialog box, which opens, click **OK**. The system closes the dialog box and removes the quick filter. The quick filter is no longer displayed in the **Filter Settings** dialog box.
4. Close the **Filter Settings** dialog box.

Step 5: Filtering Data by a Selected Cell Value

Suppose that you need to view all the sales orders that have the *Invoiced* status.

To filter the data in the table by the *Invoiced* value in the **Status** column, do the following:

1. While you are still viewing the list of sales orders, on the **All Records** tab, in the **Status** column, click a cell that has the *Invoiced* value.

If you cannot see on the first page of records any sales orders that have the *Invoiced* status, click the **Go to Next Page** button at the bottom right corner of the screen.

2. Select Shift+F. In the list of sales orders, you can now see the sales orders that have the *Invoiced* status.

   In the filtering area, you can see the **Status:= Invoiced** Quick Filter button.

3. Optional: Drag the quick filter outside of the filtering area to turn off the filter.

Step 6: Turning On Column Sorting

Suppose that you need to sort sales orders by customer name in alphabetical order.

To turn on sorting in the **Customer** column, do the following:

1. While you are still viewing the list of sales orders, click the header of the **Customer** column.

2. In the Sorting and Filtering Settings dialog box, which opens, click **Sort Ascending**. The Sorting and Filtering Settings dialog box is closed, and the sales orders in the table are sorted in alphabetical order by customer.

Step 7: Turning Off Column Sorting

To turn off sorting in the **Customer** column of the table, do the following:

1. While you are still viewing the list of sales orders, click the header of the **Customer** column.

2. In the Sorting and Filtering Settings dialog box, which opens, again click **Sort Ascending**, which has a check mark left of the option. The Sorting and Filtering Settings dialog box is closed, and the sorting is turned off.

Lesson 5: Adjusting the Table Layout

Adjusting the Table Layout: General Information

In the following sections, you will find information about adjusting layout of a table on an Acumatica ERP form.

Learning Objectives

In this chapter, you will learn how to do the following:

- Hide or display table columns
- Adjust column width
- Rearrange columns

Applicable Scenarios

You modify the default table layout on a form if you would like to view additional information or rearrange the data in a table according to your work tasks.

Table Layout

On an Acumatica ERP form, you can adjust the layout of any table to meet your requirements. Specifically, you can hide or display table columns, rearrange columns by dragging them, and change column width.

When you have adjusted the layout of a specific table on a particular form, your individual settings for the layout of this table are automatically saved to the server and automatically applied in all your future user sessions. These changes are available to you on any browser or device and are applied to your user account only. Also, these changes are applied to only the specific table on the specific form that you changed; they are not applied to any other tables.

Column Configuration Capabilities

For each table, you can manage the column set to be displayed by using the **Column Configuration** dialog box. You click the Column Configuration button (), which is located in the header row of the leftmost table column, to open the **Column Configuration** dialog box.

You can adjust table layout as follows:

- Hide columns
- Display columns that were previously hidden
- Change the order of columns

- Restore the default table layout

Setting the Accessibility of the Table Columns

For each table of a data entry or mass processing form, you can identify the accessibility of the column cells by using the **Column Configuration** dialog box. In the **Selected Columns** list of this dialog box, the system displays the columns that are visible on the table. These table columns may look like those in the following screenshot.

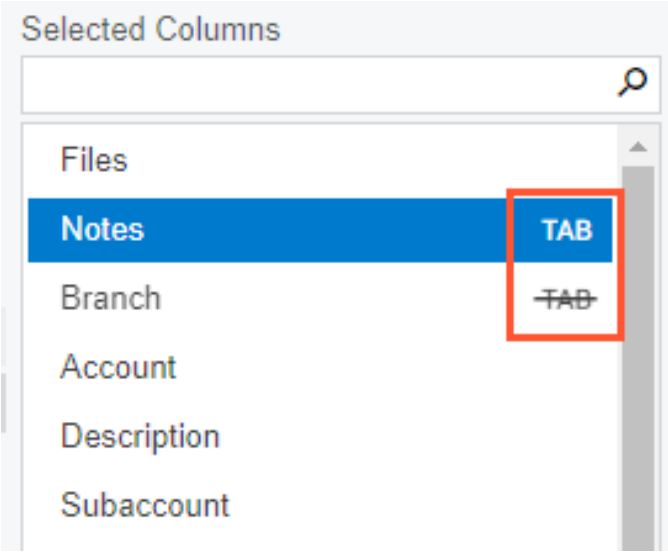

Figure: Accessibility of the column cells

- TAB: Indicates that the column is accessible through a keyboard. This button is not visible by default and appears only when you point at the column name.
- TAB: Indicates that the column is not accessible through a keyboard. If accessibility for a column has been turned off, this button is visible by default and stays visible when you point at the column name. The system skips this column when the user selects the Tab key on the keyboard.

To change the state of the accessibility of a column, in the **Selected Columns** list of the dialog box, you point at the column name and click the **Tab** or TAB button, which appears.

By default, changes in the column configuration are applied to the current user account. However, a user with administrative access to the system can configure the column accessibility and share its configuration with specific users in the system or make it the default configuration for all users.

Adjusting the Table Layout: Process Activity

The following activity will help you modify the table layout of an Acumatica ERP form in order to arrange data according to your preferences.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. Your colleague Pam Brawner has gone on vacation and you are currently working with her customers. To identify all the sales orders that she created or modified on the *Sales Orders* (SO301000) form in January 2020, you need certain key information to be displayed in the list of sales orders: the user that created the sales order, the user that last modified the sales order, and the description of the sales order.

Process Overview

In this process activity, you will do the following:

1. Display hidden table columns
2. Change the order of columns in a table
3. Hide the table columns that you do not need to see
4. Adjust column width
5. Restore the default settings of table layout

System Preparation

Before you start adjusting the layout of a table, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.

Step 1: Adding Hidden Columns to a Table

Suppose that in the list of sales orders, you need to view the sales orders that were created or modified by your colleague Pam Browner and the description she has added to each sales order. To do this, you need to see the content of the **Created By**, **Last Modified By**, and **Description** columns.

To add these hidden columns to the table, do the following:

1. On the main menu, click **Sales Orders**. The **Sales Orders** workspace opens.
2. In the **Transactions** category of the workspace, click *Sales Orders*. The list of sales orders opens.
3. In the list of sales orders, click the Column Configuration button, which is located in the header row of the leftmost column header. The **Column Configuration** dialog box opens.
4. In the dialog box, add the needed columns to the list of the selected columns as follows:
   a. In the **Available Columns** list, select **Created by** and click the Add Column button to move the name of the column to the **Selected Columns** list.
   b. In the **Available Columns** list, select **Last Modified By** and click the Add Column button to move the name of the column to the **Selected Columns** list.
   c. In the **Available Columns** list, select **Description** and click the Add Column button to move the name of the column to the **Selected Columns** list.

      - You can double-click the name of the column to move it between the lists.
      - You can select more than one column by using the Ctrl or Shift key.
      - You can type the name of the column in the search box of the Column Configuration dialog box, to quickly find a column in a long list of columns.

   d. Click **OK**, which closes the **Column Configuration** dialog box. Notice that the **Created By**, **Last Modified By** and **Description** columns are displayed in the list of records. If you cannot see the columns, use the horizontal scroll bar in the footer of the table.

To view all the columns that have been added to the table, click the **Fit to Screen** ( ) button, which is located on the table toolbar.

Step 2: Changing the Order of Columns in a Table

Suppose that you would like to view next to the numbers of sales orders the names of the users who created and modified sales orders. To do this, you need the **Created By** and **Last Modified By** columns to be displayed after the **Order Nbr.** column.

To change the order of columns in a table, do the following:

1. While you are still viewing the list of sales orders, drag the header of the **Created By** column to place the column after the **Order Nbr.** column.
2. Drag the header of the **Last Modified By** column to place the column after the **Created By** column.

Step 3: Hiding Table Columns

Suppose that you would like to view the names of the customers, but you do not need to view customer IDs. That is, you want to hide the **Customer** column in the list of sales orders.

To hide the table column, do the following:

1. While you are still viewing the list of sales orders, click the Column Configuration button to open the **Column Configuration** dialog box.
2. In the dialog box, do the following:
   a. In the **Selected Columns** list, select **Customer**.
   b. Click the Remove Column button to move the name of the column to the **Available Columns** list.
   c. Click **OK**, which closes the **Column Configuration** dialog box. Notice that the **Customer** column is not displayed in the list of sales orders.

   If the content of the table does not take up the whole screen and there is extra space on the right, click the **Fit to Screen** ( ) button, which is located on the table toolbar. The content of the table is resized to fit the screen.

Step 4: Adjusting the Column Width Manually

Suppose that in the list of sales orders, you would like to make the **Description** column wider to display all the content in the rows; you also want to make the **Customer Name** column narrower.

To adjust the column width manually, do the following:

1. While you are still viewing the list of sales orders, point at the right side of the **Customer Name** column header. When the pointer becomes a double-sided arrow, drag the pointer left to move the column boundary and make the column narrower.
2. Point at the right side of the **Description** column header. When the pointer becomes a double-sided arrow, drag the pointer right to move the column boundary and make the column wider.

   If there is not enough space on your screen to make the **Description** column wider, make some other columns narrower or hide a column that you do not use, as shown in Step 3.

Step 5: Restoring the Default Table Layout

Suppose that you have made many changes to a table, the data has become difficult to read, and you would like to cancel all your changes and restore the default layout of the table.

To restore the default table layout, do the following:

1. While you are still viewing the list of sales orders, click the Column Configuration button to open the **Column Configuration** dialog box.
2. In the dialog box, do the following:
   a. Click **Reset to Default**.
   b. Click **OK** to close the dialog box.

The default table layout of the list of records is displayed.

Lesson 6: Working with Data Entry Forms

Working with Data Entry Forms: General Information

In the following sections, you will find an overview of working with data entry forms, which you use to enter records into Acumatica ERP. You will learn about navigating to data entry forms, as well as creating, copying, and viewing records on these forms. Also, you will read about the capabilities for attaching files and notes to records on the forms.

Learning Objectives

In this chapter, you will learn how to do the following:

- Navigate to a data entry form
- Create a new record by using a data entry form
- Copy an existing record and use the copy to create a new record on the same data entry form
- Attach a file to a record
- Attach a note to a record

Applicable Scenarios

You work with a data entry form in any of the following cases:

- You need to create a record (such as an AR invoice, a GL transaction, a customer, an employee, or a stock item).
- You need to modify or act upon a record.
- You need to attach a file to a record.
- You need to attach a note to a record.

Records in Acumatica ERP

Much of the work that most users do in the system involves creating and working with records: objects in the system that can be created by a user or automatically. A record can be categorized as any of the following:

- A transaction is a record that represents the exchange or movement of money, goods, or services. Examples of transactions include appointments, change orders, bank deposits, invoices, inventory issues, payments, and purchase orders.
- A profile is a record that holds the basic settings of a person, company, or entity when no exchange or movement is involved. Examples of profiles include customers, employees, inventory items, fixed assets, credit terms, and projects.

- A class is a special type of record that holds the settings of a particular group of profiles and is used to create new profiles of the type. Examples of classes include item classes, customer classes, vendor classes, opportunity classes, and account classes.

Types of Forms in Acumatica ERP

Acumatica ERP functionality is based on forms. Forms are webpages in Acumatica ERP that you use to configure the system, enter and process records, create reports, and export and import data in various formats. You access forms through workspaces, search results, and direct links to the applicable webpages (such as those in documentation).

The main types of Acumatica ERP forms are listed below:

- Data entry forms: Data entry forms are the primary means by which users enter data to track day-to-day activities. You use a data entry form to create a new record—which may be a transaction or a profile—in the system and to view or edit the settings of the record.

  When you save the data that you have entered on a data entry form, a new record is created in the system or an existing record is modified or deleted, depending on the changes you have made on the form.

- Maintenance forms: Maintenance forms are generally used by system administrators and other department-specific specialists to create system records that ease the process of correctly entering records on data entry forms and help companies implement their policies. These records include posting classes (and other types of classes), statement cycles, overdue charges, carriers, ship via codes, and ledgers. Maintenance forms are generally listed under the **Preferences** and **Profiles** categories in workspaces.

- Lists of records: Each of these forms contains a list of transactions, profiles, or classes. When you click the name of a data entry or maintenance form in a workspace or on the Search form, the system initially opens the list of records that have been created by using the form. From this list, you can open the needed record on the corresponding form, or you can open the corresponding form to create a new record.

  In Help topics and training courses, you may encounter the terms *substitute form* and *list as entry point* to describe lists of records; these terms are used in descriptions of the technical implementation of a list of records.

- Mass processing forms: You use a mass processing form to process records of particular types, such as invoices or payments. With these forms, which are generally listed under the **Processes** category in workspaces, you can process all listed records or only those you select. A mass processing form usually has selection criteria you can use to list the needed records.

- Preferences forms: You use a preferences form to specify the general settings for a particular workflow (such as the processing of sales orders and other related documents) that can be performed by using transactions or profiles. These forms are listed under the **Preferences** category in workspaces.

- Inquiry forms: On an inquiry form, you specify any needed selection criteria and view a list of records that meet the criteria. These forms (which are listed under the **Inquiries**

category in workspaces) give you visibility into data that has been entered into the system.

- Generic inquiry forms: A generic inquiry is an Acumatica ERP custom form that you can work with as you do with predefined inquiry forms. A system administrator can create a generic inquiry, which is based on a query that collects data from the Acumatica ERP database and displays the results in the UI, and add it to the system. For details, see *Managing Generic Inquiries*.

- Report forms: You use a report form to specify the parameters of a report and then run the report. You can then print the generated report, export it to a file, or send it by email. Report forms are listed under the **Reports** category in workspaces.

Basic Elements of the Acumatica ERP Data Entry Form

A data entry form in Acumatica ERP has basic elements that help you enter data into the system, search for needed information, and share information with other users. The availability of a particular element may vary by form or based on the access rights of your user account.

The following screenshot shows the basic elements of a data entry form, which are described in the next several sections.

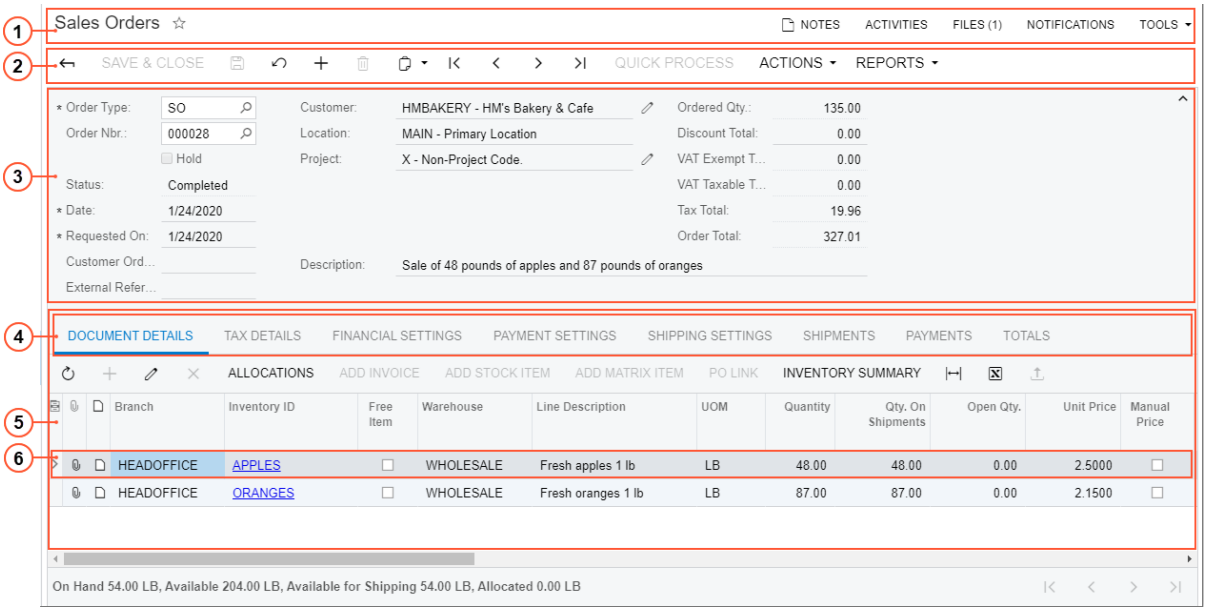

Figure: Basic elements of a data entry form

1. Form title bar
2. Form toolbar
3. Summary area
4. Tabs

5. Details area

6. Row (line or detail)

Form Title Bar

The form title bar is located at the top of the data entry form. The form title bar displays the title of the form and includes a variety of buttons and menu commands, some of which you can use to manage information related to the record or the form. These buttons and menu commands may vary by form and by the access rights of your user account.

Form Toolbar

The form toolbar of a data entry form contains standard buttons that you can use to save or cancel changes you have made to the record, or to add or delete a record. Depending on the particular form, the form toolbar may contain navigation buttons (buttons to go to different records), processing buttons, and menus consisting of commands related to the selected record or records.

Summary Area

The Summary area of a data entry form displays general information about the selected record, such as date, number, status, customer, or description. The elements in the Summary area may vary by form and by the access rights of your user account.

Tabs

The tabs of a data entry form are used for organizing information and providing easier navigation to needed information. Most data entry forms in Acumatica ERP have more than one tab.

Details Area

The Details area of a data entry form contains the details or other essential data of the record you are viewing. Depending on the form and the tab of the form (if applicable), the Details area may display one of the following:

- A table with the rows (sometimes referred to as *lines* or *details*) of the record, as in the lower half of the *Journal Transactions* (GL301000) form or on the **Document Details** tab of the *Sales Orders* (SO301000) form
- A number of UI elements with their settings, as on the **General Info** tab of the *Customers* (AR303000) form or on the **Details** tab of the *Contacts* (CR302000) form
- A rich text editor that includes text area and formatting toolbar, as on the **Details** tab of a *Cases* (CR306000) form

Row

The Details area of the form may consist of a table or of multiple tabs, some of which contain tables. For example, on the *Sales Orders* (SO301000) form, the **Document Details** tab contains rows that correspond to each line of the sales order, and the **Tax Details** tab

contains rows for each of the individual taxes applied to the sales order lines. Each row of a table in the Details area is a detail of the selected record, or a detail related to the record in some regard.

Creation of a Record

In Acumatica ERP, you can create a record in the following ways:

- By adding a new record: Starting with a blank data entry form except for the elements filled in with default settings, you fill in all necessary elements of the record.
- By using the copy-and-paste actions: You copy and paste a record of the same type.
- By using a template or class: You select a previously created template or class for the new record, and the system fills in some settings of the record based on the settings of the template or class.

If you create a record by copying another record or use a template or class, you can create records much more easily because you need to fill in or change fewer settings. For applicable forms, you can find the copying and pasting options and a list of templates in the **Clipboard** ( ) menu on the form toolbar. For details, see *To Copy a Document Contents to a New Document* and *To Create a Document by Using a Template*.

For more information, see *Copy-and-Paste Options and Document Templates*.

Navigation to a Data Entry Form

You can navigate to a data entry form in any of the following ways:

- From a workspace. Data entry forms are generally listed under the **Transactions** and **Profiles** categories in workspaces. If you click the link with the name of the data entry form, the system opens the list of records created by this data entry form. If you instead click the **New** button right of the link with the name of the data entry form, the system opens the corresponding data entry form, where you can create a new record. For details, see *Learning About the Acumatica ERP UI: Process Activity*.
- From the Search form. Data entry forms are generally listed under the **Transactions** and **Profiles** categories on the **Menu Items** tab of the Search form. If you click the link with the name of the data entry form, the system opens the list of records created by using the data entry form. If you instead click the **New** button right of the link with the name of the data entry form, the system opens the corresponding data entry form, where you can create a new record. For details, see *Searching in Acumatica ERP: Process Activity*.
- By clicking a link of a form ID of a data entry form that is mentioned in a Help topic. When forms are mentioned in a Help topic, you may see a form ID enclosed within parentheses, such as *(SO301000)*. You can click the form ID to open a data entry form to create a new record.

File Attachments

A file, such as a scanned document with a signature, can be attached to a record and to a particular detail (table row) of a record. On a list of records, you can attach a file to any

record as well as view files that have been attached to records. On a data entry form, you can attach a file to the record as a whole or any of its details; you can also view files that have been attached to the selected record or its details.

You can attach a file to a record in either of the following ways:

- In a list of records, such as sales orders, by clicking the paperclip icon in the **Files** column of the row with the record to open the **Files** dialog box and upload the file or files.
- On the form toolbar of the data entry form, by clicking the **Files** button to open the **Files** dialog box and upload the file or files.

You can also attach a file to a particular detail of a record. To do this, you click the **Files** button in the table row and use the **Files** dialog box.

If you are viewing a list of records and a file has been attached to a record, you can see the paperclip icon with a yellow background ( ) in the **Files** column of the row with the record. You can click to open the **Files** dialog box and view the attachments to the record.

If you are viewing a record on the data entry form and a file is attached to the record, on the form title bar, you can see the number of attached files in parentheses right of the **Files** button. You can click the **Files** button to open the **Files** dialog box and view the attachment.

If you are viewing a record on the data entry form and a file is attached to a particular detail of a record, in the **Files** column of the row with the detail, you can see the paperclip icon with a yellow background ( ). You can click to open the **Files** dialog box and view the attachments to the table row.

Notes

A text note, such as important information for colleagues about a customer, can be attached to a record or a particular detail of a record. On a list of records, you can attach a note to any record, as well as view notes that have been attached to records. On a data entry form, you can attach a note to the record as a whole or any of its details; you can also view notes that have been attached to the selected record or its details.

You can attach a note to a record in either of the following ways:

- In a list of records, such as sales orders, by clicking the Note icon in the **Notes** column of the row with the record to open the **Enter Record Note** dialog box, where you can add your note.
- On the form toolbar of the data entry form, by clicking the **Notes** button to open the **Enter Record Note** dialog box, where you can add your note.

You can also attach a note to a particular detail of a record. To do this, you click the **Notes** button in the table row and the **Enter Record Note** dialog box.

If you are viewing a list of records and a note has been attached to the record, you can see the Note icon with a yellow background ( ) in the **Notes** column of the row with the record. You can click to open the **Enter Record Note** dialog box and view the note.

If you are viewing a record on the data entry form and a note is attached to the record, on the form title bar, you can see the icon left of the **Notes** button. You can click the **Notes** button to open the **Enter Record Note** dialog box and view the note.

If a note is attached to a particular detail of a record, in the **Notes** column of the row with the detail, you can see the Note icon with a yellow background ( ). You can click to open the **Enter Record Note** dialog box and view the note.

Working With Data Entry Forms: Process Activity

The following activity will give you experience navigating to a data entry form—in this case, the *Sales Orders* (SO301000) form. On the form, you will create a record (a sales order) and create another sales order by copying the first sales order. You will also attach a file to the first sales order and a note to the second sales order and view the note you have attached.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. You have received two orders for fruit. The first one is a purchase order for 50 pounds of apples for the GoodFood One Restaurant customer. The second order is a similar order for 50 pounds of oranges for the FourStar Coffee & Sweets Shop customer; you have not received a purchase order from this customer yet. You need to create sales orders for both orders for fruit.

Process Overview

In this process activity, you will do the following:

1. Create a new sales order on the *Sales Orders* (SO301000) form
2. Attach the scanned purchase order from the customer to the sales order
3. Create another new sales order by copying the existing sales order
4. Attach a note to the second sales order

System Preparation

Before you start performing the steps of this activity in Acumatica ERP, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.

- The business date in your system is set to 1/30/2020. If a different date is displayed, click the Business Date menu button in the top pane of the Acumatica ERP screen, and select 1/30/2020 in the calendar.

Step 1: Creating a Sales Order

Suppose that you have received a purchase order from the GoodFood One Restaurant customer, and you need to create a new sales order based on the purchase order. The customer has assigned the reference number *10557* to its purchase order.

To create this sales order, do the following:

1. On the main menu, click the **Sales Orders** menu item. The **Sales Orders** workspace opens.
2. In the workspace, click the *New Sales Order* tile. The *Sales Orders* (SO301000) form opens so that you can create a new record.

   Not all data entry forms have a tile at the top of the workspace that you can click to create a new record on the form. As an alternate way of opening any data entry form in the workspace to create a new record, you can point at the link to the form (in this case, *Sales Orders*, which is listed in the **Transactions** category) and click the **New** button right of the link.

3. In the **Date** box of the Summary area of the form, specify 1/30/2020.
4. In the **Requested On** box, specify 1/30/2020.
5. In the **Customer** box, select the customer as follows:
   a. Click the magnifier icon.
   b. In the lookup table, which opens, double-click *GOODFOOD*. The system closes the lookup table and fills in the **Customer** box with the option you have selected.
6. In the **Description** box, type `Apples`.
7. On the **Document Details** tab, click the **Add Row** button. In the row, specify the following settings:
   - **Branch**: *HEADOFFICE*
   - **Inventory ID**: *APPLES*
   - **Quantity**: `50`

   A number of columns in the row—such as the **Warehouse**, **Line Description**, **UOM**, **Unit Price**, and **Ext. Price**—are filled in automatically, based on the settings of the item. The *APPLES* item has been predefined on the *Stock Items* (IN202500) form in the *U100* dataset.

8. On the form toolbar, click **Save**. The system saves the sales order and assigns it the *Open* status.

9. In the **Customer Order Nbr.** box, type the number the customer has assigned to the purchase order: `10557`.

   The **Customer Order Nbr.** box holds the number of the external customer document the sales order is based on. The internal reference number, which you can see in the **Order Nbr.** box, was automatically assigned to the sales order.

10. Click **Save & Close** to save the sales order. The system closes the *Sales Orders* form and opens the list of sales orders that have been created in the system. In the list of sales orders, you can see the sales order that you have just created.

Step 2: Attaching a File to the Sales Order

Suppose that you need to attach the scanned purchase order from the GoodFood One Restaurant customer to the sales order for 50 pounds of apples, which you created in the previous step. The file with this scanned purchase order has been provided in the *U100* data and has the name **PO_GoodFood1Restaurant.pdf**.

To attach the file to the existing sales order, do the following:

1. While you are still viewing the list of sales orders, in the **Order Nbr.** column, click the number of the sales order. The *Sales Orders* (SO301000) form opens with the sales order you have created for the GoodFood One Restaurant customer.

2. On the form title bar, click **Files**. The **Files** dialog box opens.

3. In the dialog box, click **Browse**, select the **PO_GoodFood1Restaurant.pdf** file, and upload the file. The file is uploaded to the system; notice that the system has added the link to the uploaded file to the **Files** dialog box.

4. Close the dialog box.

   On the form title bar, you can see the number of attached files in parentheses right of the **Files** button.

Step 3: Copying the Sales Order

Suppose that the FourStar Coffee & Sweets Shop customer ordered 50 pounds of oranges. Most settings of the new sales order are the same as those in the sales order that you created in Step 1. Thus, to quickly create the new sales order, you will copy the existing sales order and change needed settings of the copied order.

To copy the sales order, do the following:

1. While you are still viewing the sales order on the *Sales Orders* (SO301000) form, click the **Actions** menu button on the form toolbar to view the available menu commands.

2. On the **Actions** menu, click **Copy Order**. The **Copy To** dialog box opens.

An instruction to click a menu command on a menu is typically phrased as follows: On the form toolbar, click **Actions > Copy Order**.

3. In the dialog box, click **OK**. The *Sales Orders* (SO301000) form reopens for the new sales order. Some elements on the form are filled in with the data of the sales order that you have copied.

4. In the **Customer** box of the form,select *COFFEESHOP*.

5. On the **Document Details** tab, in the **Inventory ID** column of the only row, double-click right of the *APPLES* link. The value is highlighted.

   If you had instead clicked the link that has the *APPLES* value, the *Stock Items* (IN202500) form would open in a pop-up window, displaying the settings of this item.

6. In the column, type `orange`.

7. In the list of options that appears (which changes as you type), select *ORANGES - Fresh oranges 1 lb*.

8. In the **Quantity** column, type `10`.

9. In the **Unit Price** column, type `2.15`.

10. In the **Description** box of the Summary area, update the description for the sales order: Type `ORANGES`.

11. Click **Save** to save the sales order you have copied and changed.

Step 4: Attaching a Note to the Sales Order

Suppose that you are going to be absent from the office next week. Your colleague will be working with the FourStar Coffee & Sweets Shop customer during your absence. You need to inform your colleague that you have not yet received a purchase order for the 50 pounds of oranges (for which you created a sales order in the previous step). You usually attach a note to the sales order in this case, to be sure that the information is documented.

To add the note to the sales order, do the following:

1. While you are still viewing the sales order on the *Sales Orders* (SO301000) form, on the form title bar, click **Notes**. The **Enter Record Note** dialog box opens.

2. In the dialog box, type the text of the note, and click **OK**. On the form title bar, you can see a yellow icon ( ) left of the **Notes** button, which indicates that a note has been added to the sales order.

3. On the form toolbar, click **Save**. The sales order is saved along with the note you have added to it.

4. Click **Discard Changes and Close** (↰) to close the *Sales Orders* (SO301000) form (you have not made changes to the record since saving the note). The list of sales orders opens.

   You can view the note attached to the sales order by clicking in the **Notes** column of the row with the sales order; alternatively, you can open the sales order and then click on the form title bar, left of the **Notes** button.

Lesson 7: Personalizing Dashboards

Personalizing Dashboards: General Information

In the following sections, you will find information about Acumatica ERP dashboards and the basic steps of designing dashboards.

Learning Objectives

In this chapter, you will learn how to do the following:

- Identify the basic elements of an Acumatica ERP dashboard and their functions
- Recognize the types of widgets and their main features
- List the basic steps of designing a dashboard
- Modify your copy of a dashboard
- Define a dashboard as your home page
- Reset a dashboard

Applicable Scenarios

You should learn about the Acumatica ERP dashboards in either of the following cases:

- You need to monitor real-time operational metrics related to your work.
- You need to modify a dashboard to fit your requirements.

Dashboards

With Acumatica ERP dashboards, you can monitor current financial, operational, and organizational information of your company, and analyze real-time trends that relate to your job. On dashboards, different types of information can be displayed in various presentation forms—such as text, charts, graphs, and tables—depending on your preferences and the specific type of data you want to see.

A dashboard is a collection of widgets that are displayed on a single screen. Acumatica ERP dashboards support various types of widgets, which have drill-down capabilities. By using the drill-down capabilities, you can navigate directly from a dashboard widget to the source of the data you are viewing, so that you can learn more about and take actions on the data that is highlighted on the dashboard. This data might be, for example, key customers' details for the past 12 months, or the number of projects that will be closed within 30 days.

You can create a dashboard if you have access to the *Dashboards* (SM208600) form. Among the dashboard settings, you can specify the dashboard owner role for this dashboard. A user who has been assigned the dashboard owner role can design this dashboard from scratch, share the dashboard with other users, and enable other users to personalize the dashboard.

If you will be designing this dashboard, be sure to select a role that you are assigned to as the dashboard owner role. Otherwise, you will be working with your personal copy of the dashboard, and other users will not see any widgets that you add to the dashboard.

Types of Widgets

A widget is a dashboard component that provides a particular type of information, such as a real-time data view or wiki article.

Before you modify a dashboard, you need to plan how many widgets and which types you will add to it. We recommend that you add no more than seven to ten widgets to a particular dashboard. If a dashboard is cluttered with too many widgets, the users viewing the dashboard cannot understand the data quickly and easily.

You can add to a dashboard the following types of widgets:

- A chart: A graphical representation of data from an Acumatica ERP form. You can use charts of various types, such as bar charts and line charts.
- A data table: A systematic display of data from an Acumatica ERP form, with data arranged into rows and columns.
- An embedded page: A document or an image that is stored on an external resource, such as cloud storage.
- A pivot table: A data table organized to filter, sort, count, total, or give the average of data from an Acumatica ERP inquiry, displaying the summarized results in a separate table.
- A Power BI tile: A chart, scorecard, or other analytical information that is represented on a Power BI dashboard designed by your organization.
- A scorecard KPI: A statistical record that measures progress or achievement toward a set performance indicator by showing parameters that are important to the business processes of your organization and should be monitored daily.
- A trend card KPI: A statistical record showing parameters whose dynamic change is important to the business processes of your organization.
- A wiki page: A reference topic, procedure, business plan, or other content that is frequently consulted by Acumatica ERP users.

Most types of widgets are based on data from generic inquiries. A generic inquiry is a user-definable (generally by a developer or system administrator) tool that collects data from the system database and displays the query results on an Acumatica ERP form.

If you have access rights to view the form a particular widget is based on, you can do the following:

- During dashboard design: Select for the widget the data that is displayed on the widget and drill down as needed for more details

- While you are viewing the dashboard: View the widget, which displays data from the form

For details, see *Dashboards*.

Dashboard Modes

In Acumatica ERP, dashboards can be displayed in view or design mode. When you open a dashboard, it is displayed in view mode. To modify a dashboard (if you have access rights to do so), you switch to design mode, which is described in the following sections.

Basic Elements of a Dashboard in Design Mode

When a dashboard is in design mode, you may see the following basic elements on the dashboard.

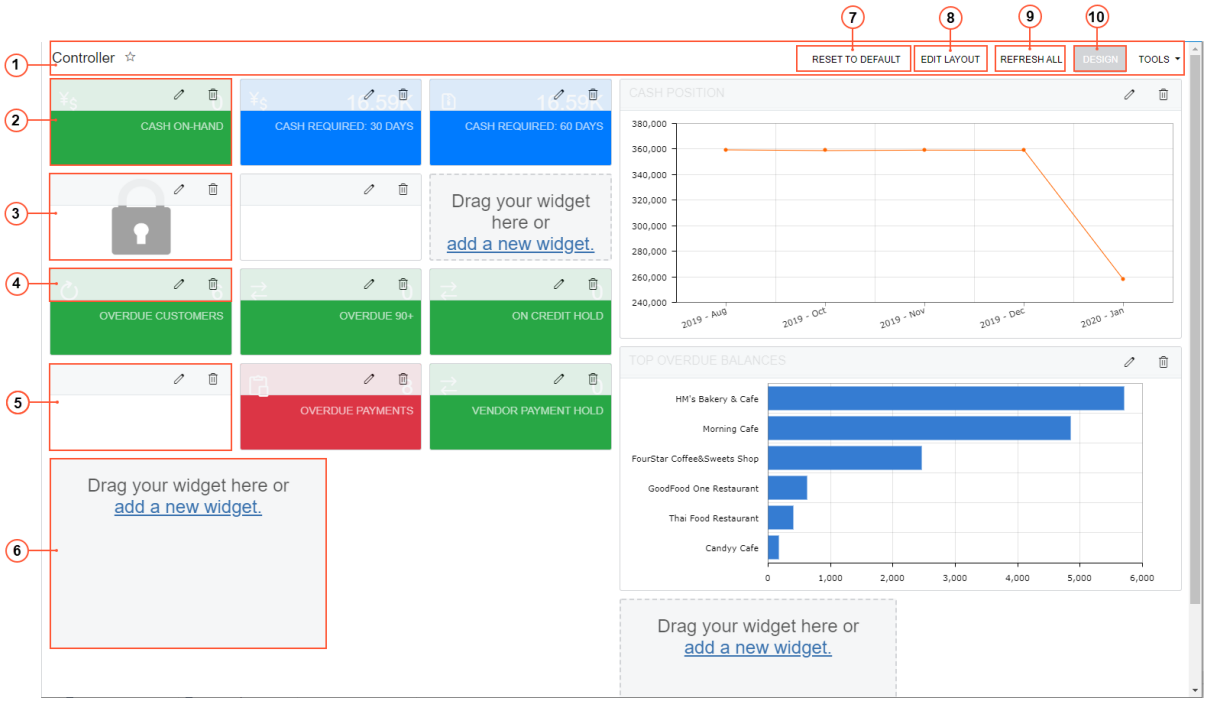

Figure: Basic elements of a dashboard in design mode

1. The dashboard title bar, which you can use to invoke needed actions.
2. A widget in design mode.
3. A widget with unavailable data. If you do not have access rights to view a form, you cannot view the data in the widget. This is true of both view mode and design mode.
4. A title bar of a widget, with buttons you can click to edit or delete the widget.
5. A blank widget in design mode.

6. A widget placeholder. You can add a new widget or replace with an existing widget this UI element.
7. The **Reset to Default** button. You can see this button if your copy of the dashboard differs from the original dashboard. You click the button to cancel all your changes to the dashboard and restore the default dashboard definition and settings.
8. The **Edit Layout** button. You click this button to select any of the predefined dashboard layout templates that are available in the system. By using dashboard layout templates, you can arrange widgets on the dashboard in one or two columns and select equal or different (narrow left and wide right or wide left and narrow right) column widths.
9. The **Refresh All** button. You click this button to update the information on the dashboard.
10. The **Design** button. You click this button to switch between the design and view modes for the dashboard.

Dashboard Design

To design a dashboard, you create your copy and switch on design mode for the dashboard. When you do this for the first time, you can see the **Create User Copy** button on the dashboard title bar. This button is displayed, if you have access rights to design the dashboard. Once you have created your copy of the dashboard, the **Design** button is instead displayed on the dashboard title bar.

If you want to modify the widgets on a dashboard, you switch on design mode for the dashboard by clicking the **Design** button. When the dashboard is in design mode, you can see widget placeholders and the Remove and Edit buttons on the widget title bars.

The process of designing a dashboard may include the following steps:

- Adding widgets
- Modifying the data in widgets
- Removing widgets from the dashboard
- Arranging the widgets on the dashboard
- Resizing widgets
- Setting the dashboard layout
- Resetting the dashboard

Personalizing Dashboards: Process Activity

The following activity will walk you through the process of modifying your copy of an Acumatica ERP dashboard. This activity will also introduce you to the use of the drill-down capability to obtain more detail about the data that is displayed in a widget of the dashboard.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. You have been using a predefined dashboard to stay informed about overdue customers. You need to create your own copy of the dashboard in order to monitor your overdue customers and the quantities of available items that you can sell.

Process Overview

In this process activity, you will do the following:

1. Switch on design mode for the predefined dashboard
2. Modify a widget
3. Drill down to the underlying data shown in a widget
4. Remove widgets from the dashboard
5. Rearrange widgets on the dashboard
6. Resize a widget
7. Select the dashboard layout template
8. Add a widget to a dashboard
9. Specify the dashboard as your Acumatica ERP home page
10. Reset the modified dashboard to the default view

System Preparation

Before you start modifying a dashboard in Acumatica ERP, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.
- The business date in your system is set to 1/30/2020. If a different date is displayed, click the Business Date menu button in the top pane of the Acumatica ERP screen, and select 1/30/2020 in the calendar.

Step 1: Switching On Design Mode for the Predefined Dashboard

Suppose that you need to save a copy of the dashboard and switch it to design mode, to modify it for your personal use.

To switch on design mode of the dashboard, do the following:

1. Open the **Dashboards** workspace.

   To open the **Dashboards** workspace more quickly during this activity, add the workspace to the main menu, as described in the *Learning About the Acumatica ERP UI: Process Activity*.

2. In the **Dashboard: Finance** category, click *Controller*. The *Controller* dashboard opens.

3. On the dashboard title bar, click the **Create User Copy** button. The system creates your personal copy of the dashboard. Notice that the **Design** button has appeared on the dashboard title bar.

   You can see the **Create User Copy** button on the dashboard title bar before you switch on design mode for a dashboard for the first time. When you have created your copy of the dashboard, the **Design** button is displayed on the dashboard title bar.

4. Click the **Design** button. You have switched the dashboard to design mode.

Step 2: Modifying a Widget

Suppose that in the existing *Top Overdue Balances* widget, you need to add to the chart a legend that has the invoice amount for each customer.

To modify the widget in this way, do the following:

1. While you are still viewing the *Controller* dashboard in design mode, on the widget title bar of the *Top Overdue Balances* widget, click the Edit button (✎). The **Widget Properties** dialog box opens.

2. In the dialog box, click **Configure**. The **Chart Settings** dialog box opens.

3. In the **Legend** box of the **Series** section, select *Invoice Amount*.

4. In the **Legend Position** box, select *Bottom*.

5. Click **OK** to close the **Chart Settings** dialog box.

6. In the **Widget Properties** dialog box, click **Finish**. Notice that the view of the chart has changed so that the invoice amount for each customer is displayed in the legend of the chart.

   You can see the modified *Top Overdue Balances* widget in the following screenshot.

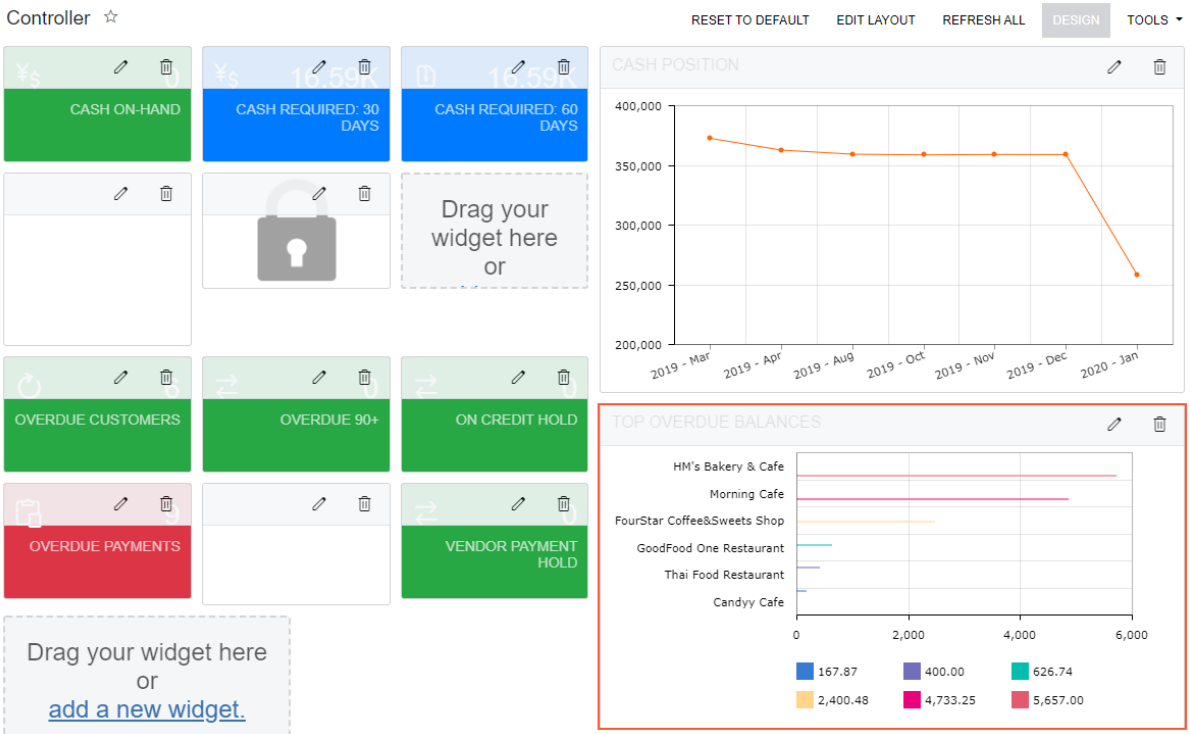

Figure: The modified Top Overdue Balances widget

7. On the dashboard title bar, click the **Design** button to switch to view mode for the dashboard.

Step 3: Drilling Down to the Underlying Data of a Widget

Suppose that while viewing the *Controller* dashboard, you need to quickly open the overdue balance details for the HM's Bakery & Cafe customer.

To view the data that the widget is based on, do the following:

1. Point at the title of the *Top Overdue Balances* widget, and notice that it is a button you can click.

2. Click the **Top Overdue Balances** button. The **Overdue** tab of the *DB AR Customer Summary (GI000049)* inquiry form opens in a new browser tab, where you can see the overdue balance details for HM's Bakery & Cafe. You can close this tab when you are done viewing the inquiry form.

To drill down to the underlying data of such widgets as a Power BI tile, a scorecard KPI, or a trend card KPI, you can click the needed tile to view the data that the tile in the widget is based on.

Step 4: Removing Widgets from the Dashboard

Suppose that in your copy of the *Controller* dashboard, you do not need the following widgets, which are related to cash: *Cash Position*, *Cash On-Hand*, *Cash Required: 30 Days*, *Cash Required: 60 Days*, the widget with unavailable data, and any blank widgets.

To remove these widgets from the dashboard, do the following:

1. While you are again viewing the *Controller* dashboard in view mode, click the **Design** button on the dashboard title bar to switch on design mode for the dashboard.
2. On the widget title bar of the *Cash Position* widget, click the Remove button (🗑). The warning dialog box opens.
3. In the warning dialog box, click **OK**. The widget is removed from the dashboard, and the remaining widgets are automatically rearranged.
4. By performing similar actions to those in the previous two instructions, delete the following widgets from your dashboard:

   a. *Cash On-Hand*

   b. *Cash Required: 30 Days*

   c. *Cash Required: 60 Days*

   d. A widget with unavailable data; for such a widget, a gray lock icon is shown against a white background

   e. Any blank widgets (those in which you see only a white background and the widget toolbar)

   You can see the modified dashboard in the following screenshot.

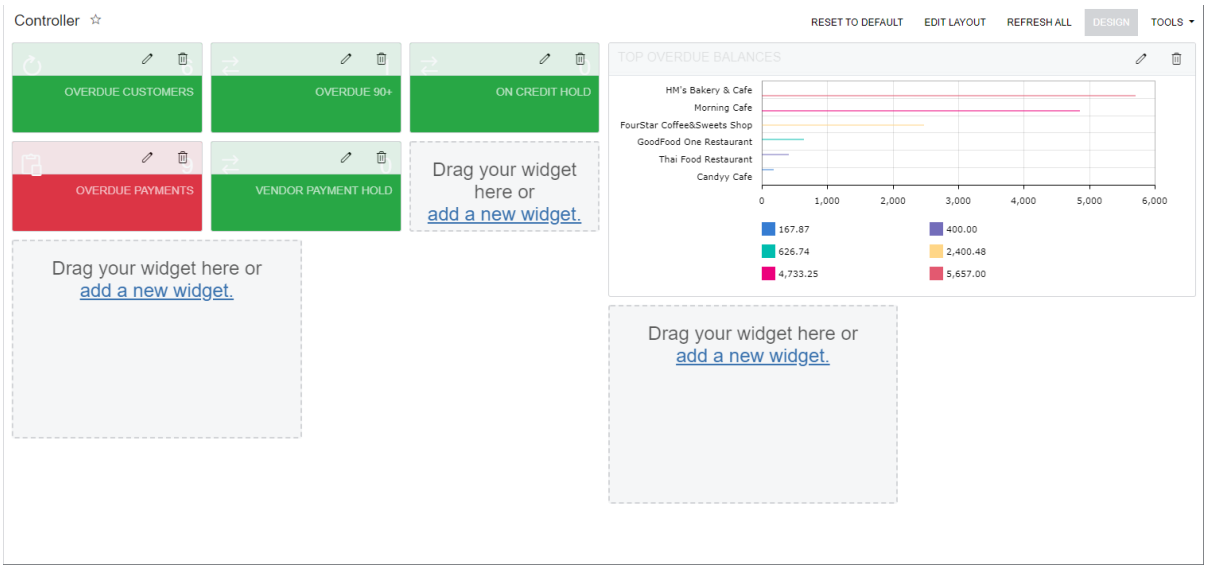

Figure: The dashboard without the widgets related to cash

5. On the dashboard title bar, click the **Design** button to switch to view mode for the dashboard.

Step 5: Rearranging Widgets on the Dashboard

Suppose that you want to move the *Top Overdue Balances* widget to the lower-left part of the dashboard.

To rearrange widgets on the dashboard, do the following:

1. While you are still viewing the *Controller* dashboard in view mode, click the **Design** button on the dashboard title bar to switch on design mode.

2. Drag the *Top Overdue Balances* widget by its title bar to the lower-left part of the dashboard.

You can see the modified dashboard in the following screenshot.

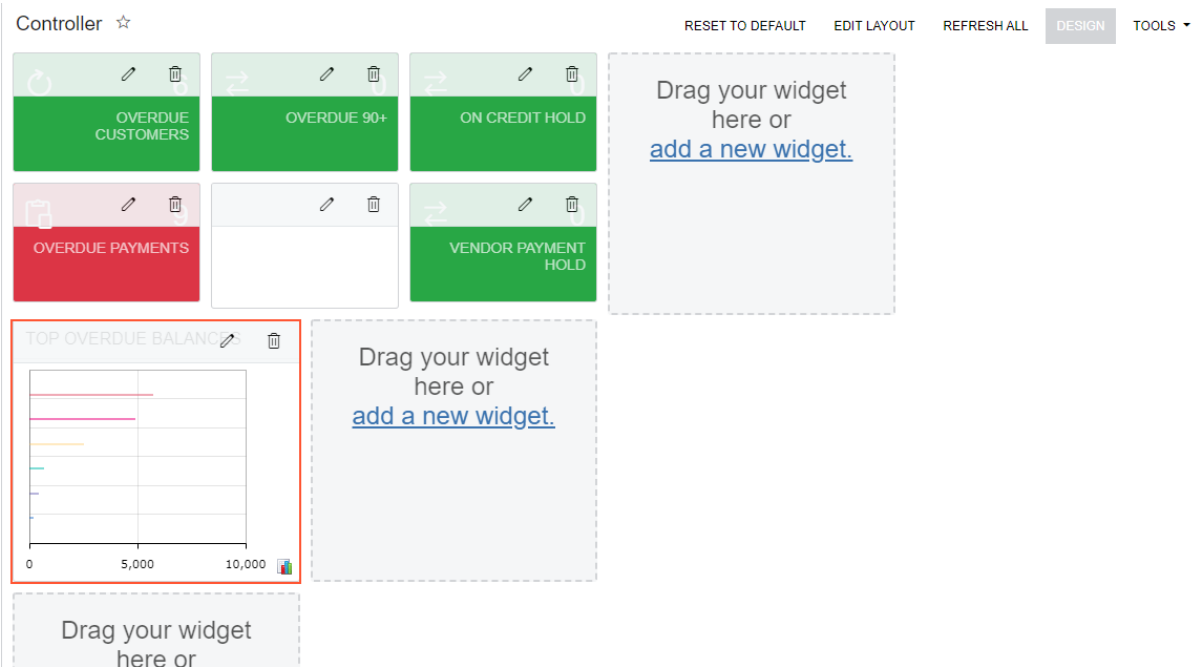

Figure: The Top Overdue Balances widget moved to the lower-left part of the dashboard

Step 6: Resizing a Widget

Suppose that you want to make the *Top Overdue Balances* widget larger.

To resize the widget, do the following:

1. While you are still viewing the *Controller* dashboard in design mode, drag the bottom right corner of the *Top Overdue Balances* widget to the right to make it larger (the width of the widget should be about half of the width of the working area).

   You can see the modified dashboard in the following screenshot.

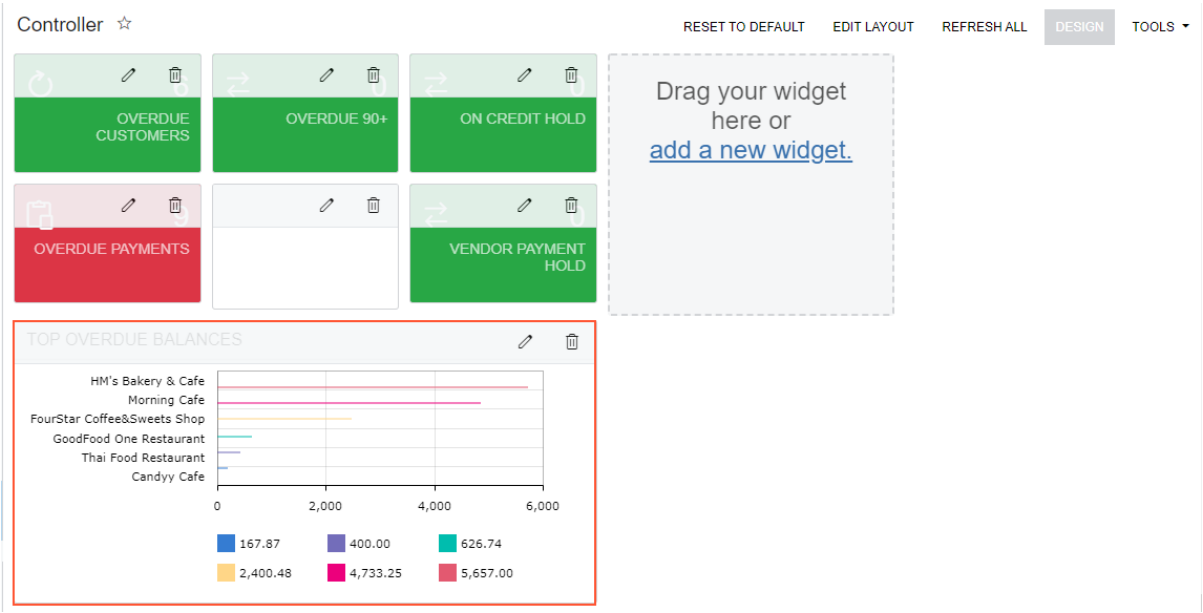

Figure: The resized Top Overdue Balances widget

2. On the dashboard title bar, click the **Design** button to switch to view mode for the dashboard.

Step 7: Selecting a Template for the Dashboard Layout

Suppose that you want to arrange the widgets on the dashboard so that the left column takes two-thirds of the working area width.

To select a dashboard layout template, do the following:

1. While you are still viewing the *Controller* dashboard in view mode, click the **Design** button on the dashboard title bar to switch on design mode for the dashboard.

2. On the dashboard title bar, click the **Edit Layout** button.

3. In the **Dashboard Layouts** dialog box, which opens, do the following:

   a. Select the layout template that has a wide left column (two-thirds of the working area) and a narrow right column (one-third of the working area).

   b. Click **OK**. The dialog box is closed, and the dashboard widgets are arranged within the selected layout. You can see the modified dashboard, with the left column taking two-thirds of the working area, in the following screenshot.

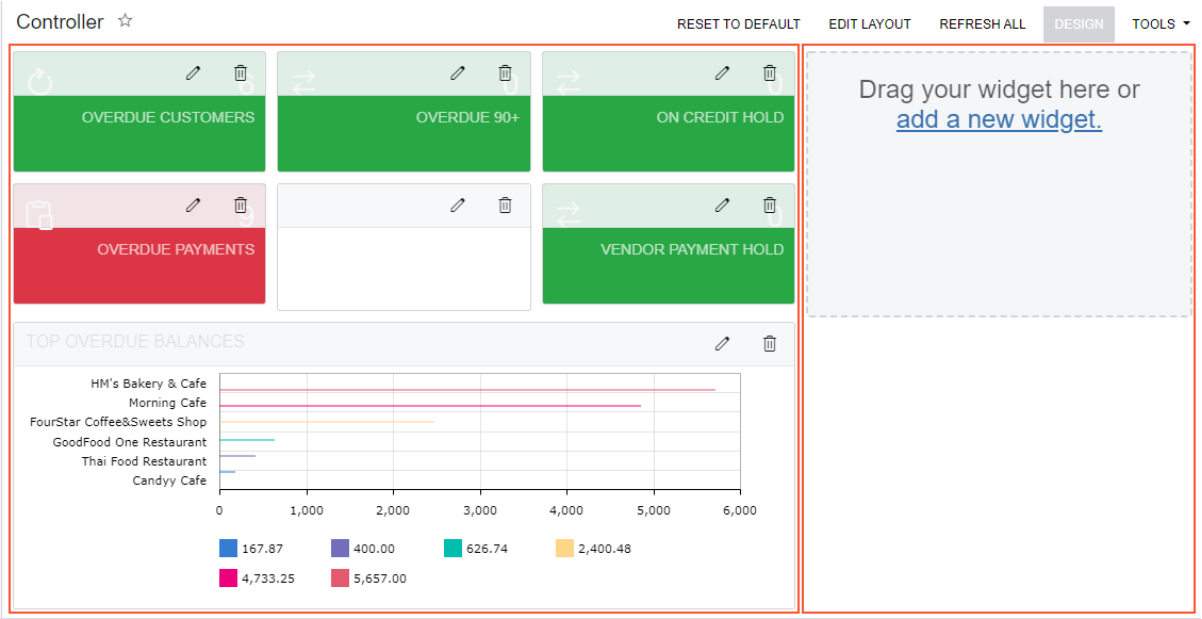

Figure: The dashboard layout with the wider left column

4. On the dashboard title bar, click the **Design** button to switch to view mode for the dashboard.

Step 8: Adding a Data Table Widget to the Dashboard

Suppose that in January 2020, your supplier has been experiencing delays in delivering apples. Thus, on the dashboard, you need to monitor the quantity of apples that are available for selling.

To add a data table widget to the dashboard, do the following:

1. While you are still viewing the *Controller* dashboard in view mode, click the **Design** button on the dashboard title bar to switch on design mode for the dashboard.
2. In the widget placeholder in the right part of the screen, click *add a new widget*. The **Add Widget** dialog box opens.
3. In the **Add Widget** dialog box, select **Data Table**.
4. Click **Next**.
5. In the **Widget Properties** dialog box, which opens, select the generic inquiry as follows:
   a. In the **Inquiry Screen** box, click the magnifier icon. The lookup table opens.
   b. In the Search box, type `inventory summary`.
   c. In the **Title** column, double-click the *Inventory Summary* name of the generic inquiry, which closes the lookup table and fills in the **Inquiry Screen** box of the dialog box.

6. Specify the generic inquiry parameters as follows:

   a. Click **Inquiry Parameters**. The **Inquiry Parameters** dialog box opens.

   b. In the dialog box, specify the values of the inquiry parameters as follows:

      - For the **Inventory ID** parameter, select *APPLES*.
      - For the **Warehouse** parameter, select *WHOLESALE*.

      To select each of these values, you first double-click in the **Value** column for the needed row. Then you can click the magnifier icon and select the value in the lookup table, or you can start typing the value in the column and select the value from the list of options containing the typed string.

   c. Clear the check boxes in the **Use Default Value** column for the following parameters:

      - **Expand by Lot/Serial Number**
      - **Subitem**
      - **Location**

   d. Click **OK**.

7. In the **Widget Properties** dialog box (which you return to after closing the **Inquiry Parameters** dialog box), specify column settings for the data table as follows:

   a. Click **Column Settings**.

   b. In the **Column Settings** dialog box, which opens, move columns from the **Selected Columns** list to the **Available Columns** list by selecting each needed column and then clicking the arrow pointing left. The **Selected Columns** list should contain the following columns:

      - **Inventory ID**
      - **Available**
      - **Warehouse**
      - **On Hand**

   c. Click **OK**. The **Column Settings** dialog box is closed.

8. In the **Caption** box of the **Widget Properties** dialog box (to which you return), type `APPLES` to specify the title of the widget.

9. Click **Finish** to create the widget with the settings you have specified, save it, and add it to the dashboard.

10. Drag the right border of the **Apples** widget to the right to make it larger, so that it takes the whole right column. You can see the modified dashboard with the new data table widget in the following screenshot.

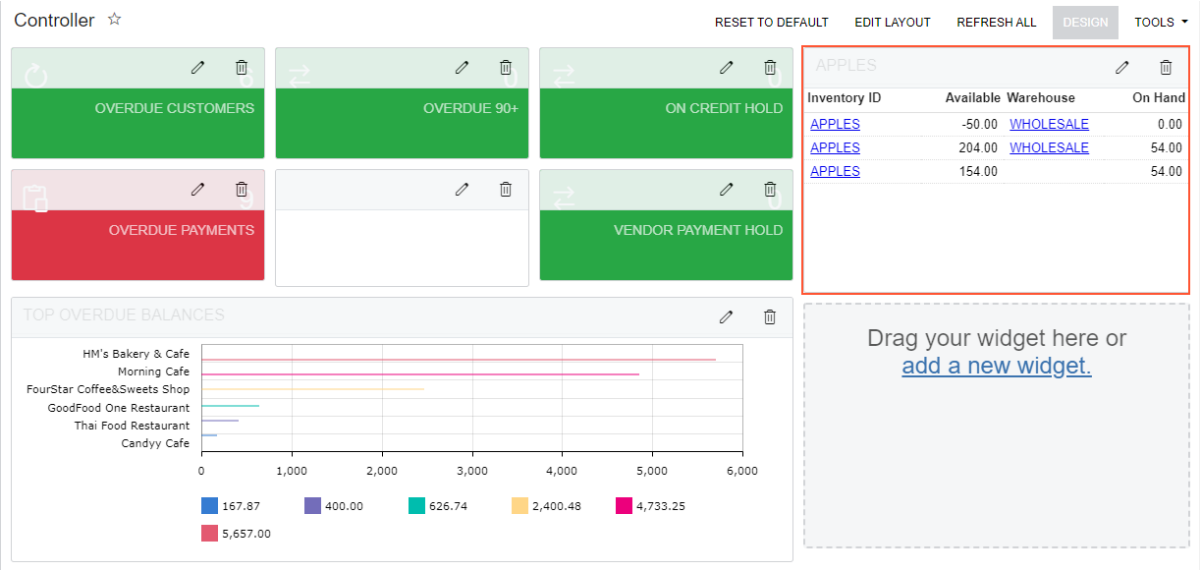

Figure: The dashboard with the data table widget

11. On the dashboard title bar, click the **Design** button to switch to view mode for the dashboard.

Step 9: Defining the Dashboard as Your Acumatica ERP Home Page

To make your modified *Controller* dashboard your home page in Acumatica ERP, do the following:

1. In the top pane, click the User menu button (where your user name appears), and on the User menu, click **My Profile**. The *User Profile* (SM203010) form opens.
2. On the **General Info** tab (**Personal Settings** section), in the **Home Page** box, click the magnifier icon to open the lookup table.
3. In the Search box of the lookup table, type `controller` to search for the *Controller* dashboard.
4. In the **Title** column, double-click *Controller* to select the value, close the lookup table, and fill in the **Home Page** box.
5. On the form toolbar, click **Save** to save your changes.
6. In the upper left corner of the Acumatica ERP screen, click the Home button to make sure that the *Controller* dashboard, which you have defined as your home page, opens.

Step 10: Resetting the Dashboard

Suppose that due to changes in your job responsibilities, you do not need your user copy of the dashboard and you would like to return to using the predefined *Controller* dashboard, which you used before creating a copy and personalizing it.

To reset the dashboard, do the following while you are still viewing the *Controller* dashboard:

1. On the dashboard title bar, click the **Design** button to switch on design mode.
2. Click the **Reset to Default** button to replace the settings of your copy of the dashboard with the settings of the predefined dashboard.

Lesson 8: Working with Reports

Working with Reports: General Information

In the following sections, you will find information about typical Acumatica ERP reports and report parameters.

Learning Objectives

In this chapter, you will learn how to do the following:

- Identify the basic elements of the report form
- Specify report parameters and generate a report
- Create a report template
- Share your report template
- Set up an ad hoc filter for a report
- Print a report
- Export a report to Excel

Applicable Scenarios

You learn about Acumatica ERP reports if you need to quickly obtain the required data from the system in a user-friendly, easy to grasp format in order to view and analyze this data, which can be tailored in both data selection and format. You can also share key information with your colleagues or external organizations.

Acumatica ERP Reports

Acumatica ERP reports are designed to give you a real-time view of your work, and you can adjust the report parameters to meet your specific information needs. With the reports' drilling capabilities, you can drill down to the level of detail that is affecting your report or explore different report elements.

You can generate the following types of reports:

- Standard reports, such as the *Shipment Summary* (SO620500) report, *Sales Order Details by Customer* (SO611000) report or *Daily Sales Profitability* (AR676000) report.
- Printed forms, such as the *Sales Order* (SO641010) report, the *Pick List* (SO644000) report, or the *Shipment Confirmation* (SO642000) report.
- Analytical reports, such as the *Sales Profitability Analysis* (AR409000) report, which are described in *Managing Analytical Reports*.

You can also use inquiry forms for building reports, such as the *Leads BI (CR3010BI)* or *Cases BI (CR3060BI)* form. For details, see *Managing Generic Inquiries*.

You run a report by accepting or modifying the report parameters and clicking the **Run Report** button on the report form toolbar. In most reports, you can select the detailed or summary format of the report, specify the dates to be included in the report, select your company or company and branch, and specify other parameters that determine the data to be included in the report, such as the specific warehouse.

When you have generated a report, you can do any of the following:

- Print the report, if printing settings are configured for Acumatica ERP, or save a copy of the report as a PDF file.
- Send the report by email. If email settings are configured for Acumatica ERP, you can send a report to your colleagues or interested parties in an external organization.
- Export the report to an Excel spreadsheet or a PDF file.
- Save your report parameters in a template that you can reuse. You can make the template as your default for the particular report, which means that every time you open the report form, it opens with the parameters that you specified for the template.
- Share your report template with other users, if the selected parameters may be used frequently to meet users' needs for information.
- Make changes to the report parameters and rerun the report, if you determine that your initial selections did not provide the needed information or you want a different picture of the data (such as a different report format).

Basic Elements of the Report Form

The following screenshot shows the basic elements of an Acumatica ERP report form.

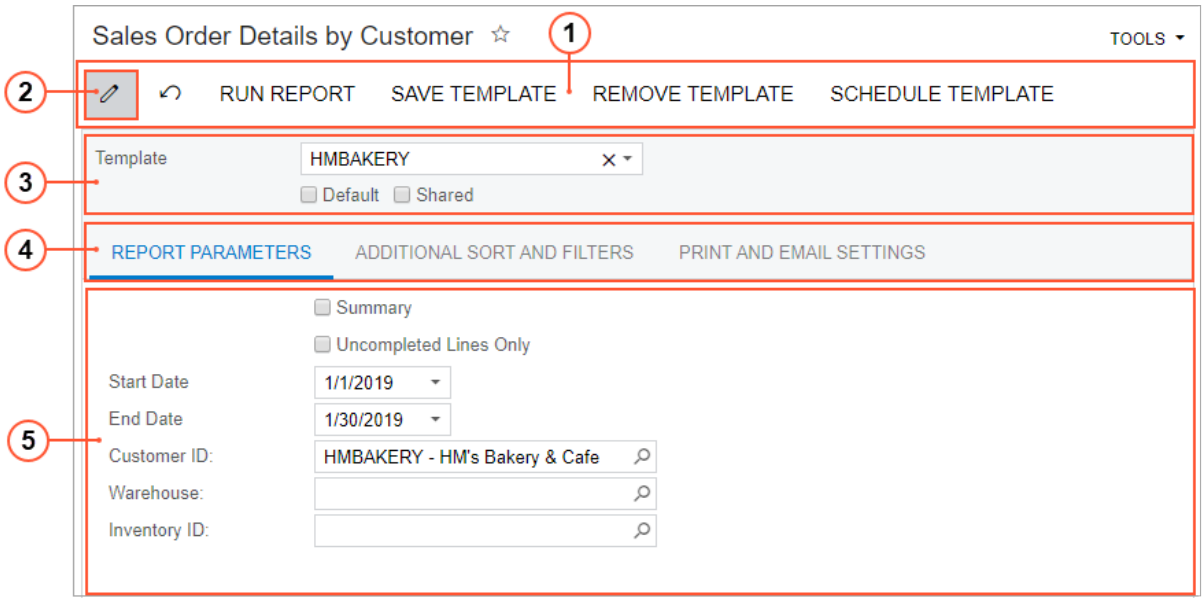

Figure: Basic elements of the report form

1. The report form toolbar, with buttons you can use to run the report, save the report parameters as a template, remove the current template, or schedule the processing of the report with the selected template
2. The **Parameters** button, which you use to switch between the report parameters (after it has been run) and the report form
3. The Template area, where you can select an existing template, set the selected template as your default for the report form, and share the template with other users
4. The tabs of the report form
5. The Tab area, which shows the elements of the selected tab

Sorting in Reports

When you are specifying the parameters of the report, you can specify sorting conditions for the report data on the **Additional Sort and Filters** tab of the report form.

Ad Hoc Filters

An ad hoc filter is a filter that you can set up on a report form to fine-tune the basic report parameters.

You cannot save an ad hoc filter to be reused at a later time. You can, however, set up a report template that contains the filtering and sorting settings of an ad hoc filter, save this template, and reuse it. For more information on ad hoc filters, see *Creation of Advanced and Ad Hoc Filters* and *Working With Data Entry Forms: Process Activity*.

Working with Reports: Process Activity

In the following activity, you will practice generating some Acumatica ERP reports, so that you become familiar with the report parameters you can adjust to meet your needs.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. It is the end of January 2020, and you need to view the data about inventory items that have been sold in January and the statuses of sales orders that have been created for your customer, GoodFood One Restaurant.

Process Overview

In this process activity, you will do the following:

1. Run a report
2. Change the report parameters and rerun the report
3. Create a template for a report
4. Define the template as your default for the report
5. Share the report template with other users
6. Configure an ad hoc filter for the report
7. Print a report to a PDF file
8. Export a report to an Excel spreadsheet

System Preparation

Before you start working with Acumatica ERP reports, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.
- The business date in your system is set to 1/30/2020. If a different date is displayed, click the Business Date menu button in the top pane of the Acumatica ERP screen, and select 1/30/2020 in the calendar.

Step 1: Running a Report

Suppose that you need to find out sales profitability for stock items in January 2020. You will use the *Sales Profitability by Item Class and Item* (AR674000) report to view this information.

To run this report, do the following:

1. On the main menu, click **Sales Orders**. The **Sales Orders** workspace opens.
2. In the **Reports** category of the workspace, click *Sales Profitability by Item Class and Item*. The report form opens, from which you can run the report.
3. On the **Report Parameters** tab (which is displayed automatically when a report form opens), do the following:
   - **a.** In the **Start Date** box, make sure that the *1/1/2020* value is selected.
   - **b.** In the **End Date** box, make sure that the *1/30/2020* value is selected.
   - **c.** On the report form toolbar, click **Run Report**. The report is generated and displayed in the working area.

     Notice that the report toolbar has a different set of buttons than the report form toolbar does; the **Parameters** button is still available, which you can use to switch between the report and the report form.

Step 2: Changing the Report Parameters and Rerunning the Report

Suppose that you need to modify the parameters of the *Sales Profitability by Item Class and Item* (AR674000) report so that you can see the completed transactions for apples sold to GoodFood One Restaurant in January 2020.

To change the report parameters, do the following:

1. While you are still viewing the generated the *Sales Profitability by Item Class and Item* (AR674000) report, click **Parameters** on the report form toolbar to switch to the report form.
2. On the **Report Parameters** tab, do the following:
   - **a.** In the **Report Format** box, select *Summary*.
   - **b.** In the **Inventory** box, select *APPLES*.
   - **c.** In the **Customer** box, select *GOODFOOD*.
   - **d.** Clear the **Released Transactions Only** check box.
   - **e.** Select the **Completed Transactions Only** check box.
3. On the report form toolbar, click **Run Report**. The report, which displays the summary data on sales profitability for apples in January 2020, is generated and displayed in the working area.

Step 3: Creating a Template for a Report

Suppose that currently you only work with sales to the GoodFood One Restaurant customer. At the end of every month, you need to monitor the status of sales orders for the customer by using the *Sales Order Details by Customer* (SO611000) report. You would like to specify the parameters for the report once and save the template of the report, so that you can quickly reuse the report parameters. In February you are going on vacation, and you would like to share the report template with your colleague who will be working with the customer during your absence.

To create a template for the report, do the following:

1. On the main menu, click **Sales Orders**. The **Sales Orders** workspace opens.
2. In the **Reports** category of the workspace, click *Sales Order Details by Customer*. The report form opens.
3. On the **Report Parameters** tab, do the following:
   a. In the **Start Date** box, make sure that the *1/1/2020* value is selected.
   b. In the **End Date** box, make sure that the *1/30/2020* value is selected.
   c. In the **Customer ID** box, select *GOODFOOD*.
4. On the report form toolbar, click **Save Template**.
5. In the **Enter Template Name** dialog box, which opens, do the following:
   a. Type `GOODFOOD`.
   b. Click **OK**. The system closes the dialog box and saves the template. In the **Template** box of the Template area, you can see the name of the template: *GOODFOOD*.
6. Run the report to notice all the parameters that you have selected for the template.

Step 4: Define the Template as Your Default

Suppose that you would like to make the *GOODFOOD* template, which you created in the previous step, your default template for the *Sales Order Details by Customer* (SO611000) report. This means that each time you open the report, the report parameters of the template are automatically selected.

To make *GOODFOOD* your default template for the report, do the following:

1. While you are still viewing the generated *Sales Order Details by Customer* report, click the **Parameters** button on the report form toolbar to switch to the report form.
2. In the Template area, select the **Default** check box.
3. On the report form toolbar, click **Save Template**.

4. In the **Enter Template Name** dialog box, which opens, click **OK** to save your changes in the template. Each time you open the *Sales Order Details by Customer* report form, your report parameters for the *GOODFOOD* template will be selected by default.

Step 5: Sharing the Report Template

Suppose that in February, you are going on vacation and you would like to share the *GOODFOOD* report template (which you created in Step 3) with your colleague who will be working with the customer during your absence.

To define the template of the report so that it can be shared with other users, do the following:

1. While you are still viewing the *Sales Order Details by Customer* (SO611000) report form, in the Template area, clear the **Default** check box.

   You cannot share a default template. If you select the **Shared** check box, the **Default** check box becomes cleared and unavailable for editing.

2. Select the **Shared** check box.

3. On the report form toolbar, click **Save Template**.

4. In the **Enter Template Name** dialog box, which opens, click **OK** to save your changes to the template. Now other users can select your template in the **Template** box of the *Sales Order Details by Customer* report form.

Step 6: Configuring an Ad Hoc Filter for the Report

Suppose that you need to know the statuses of the sales orders that contain apples and oranges sold to the GoodFood One Restaurant customer. The *Sales Order Details by Customer* (SO611000) report provides this information, but it can take you quite long to scan for specific details. By using an ad hoc filter, you can select the needed details.

To configure an ad hoc filter for a report, do the following:

1. While you are still viewing the *Sales Order Details by Customer* (SO611000) report form, make sure that the *GOODFOOD* report template is selected.

2. On the **Additional Sort and Filters** tab, in the **Additional Filtering Conditions** table, do the following:

   a. Click **Add Row** to add a row to the table.

   b. In the **Property** column of the added row, select *Sales Order Line.Inventory ID*.

   c. In the **Condition** column, select *Equals*.

   d. In the **Value** column, select *APPLES*.

   e. In the **Operator** column, select *Or*.

   f. Click **Add Row** to add another row to the table.

   g. In the **Property** column of the added row, select *Sales Order Line.Inventory ID*.

   h. In the **Condition** column, select *Equals*.

   j. In the **Value** column, select *ORANGES*.

3. On the report form toolbar, click **Run Report**. The report, which displays the statuses of the sales orders that contain apples and oranges sold to the GoodFood One Restaurant, is generated and displayed in the working area.

4. Optional: Save the report template that has the settings of your ad hoc filter as follows:

   a. Click **Parameters** to switch to the report form.

   b. On the report form toolbar, click **Save Template**.

   c. In the **Enter Template Name** dialog box, which opens, type `GOODFOOD: apples & oranges`, and click **OK** to save the template.

   In the **Template** box, you can select the *GOODFOOD: apples & oranges* report template.

Step 7: Printing a Report to a PDF File

Suppose that you need to print a pick list for a warehouse employee who is shipping an order to the HM's Bakery & Cafe customer. The *Pick List* (SO644000) report is designed to generate an easy-to-comprehend version of any pick list.

To print the report to a PDF file, do the following:

1. On the main menu, click **Sales Orders**. The **Sales Orders** workspace opens.

2. In the **Printed Forms** category of the workspace, click *Pick List*. The report form opens.

3. In the **Shipment Nbr.** box of the **Report Parameters** tab, select the shipment number *000028*.

4. On the report form toolbar, click **Run Report**. The form of the report is displayed.

5. On the report toolbar, click **Print**.

6. In the dialog box, which opens, do the following:

   a. Select the option related to printing the report as a PDF file.

   b. Save the PDF file to your computer.

If a printer is configured in your Acumatica ERP system, you could instead select a printer from the list and print the document.

Step 8: Exporting a Report to Excel

Suppose that you need to run the *Shipment Register* (SO612500) report and then export the report to Excel for a warehouse employee who will use the exported report data as a template to prepare a register for the warehouse.

To export a report to Excel, do the following:

1. On the main menu, click **Sales Orders**. The **Sales Orders** workspace opens.
2. Click the **Show All** button to switch to the full view of the workspace.
3. In the **Reports** category of the workspace, select *Shipment Register*. The report form opens.
4. In the **Start Date** box of the **Report Parameters** tab, make sure that the *1/1/2020* value is selected.
5. In the **End Date** box, make sure that the *1/30/2020* value is selected.
6. On the report form toolbar, click **Run Report**. The report is displayed.
7. On the report toolbar, click **Export > Excel**. The report is exported in Excel and downloaded to your computer.

Lesson 9: Managing Favorites

Managing Favorites: General Information

In the following sections, you will find information about managing your favorites in Acumatica ERP.

Learning Objectives

In this chapter, you will learn how to do the following:

- Add a link to form, report, or dashboard to your favorites
- Remove a link to a form, report, or dashboard from your favorites

Applicable Scenarios

You manage favorites in Acumatica ERP in either of the following cases:

- You need to easily access the forms, reports, and dashboards you use most frequently.
- You need to rearrange the items you have saved as your favorites.

Favorites

Acumatica ERP provides you with easy access to the forms, reports, and dashboards that you use commonly in your everyday work. You can add to the **Favorites** workspace a link to any workspace item (form, report, or dashboard) that is available to you. You can add an item either from a workspace or from the opened form, report, or dashboard. The default **Favorites** workspace does not contain any links to workspace items.

When you add a link to an item to your **Favorites** workspace, the link and the category are displayed in the workspace. If you no longer need a link in your favorites, you can remove the link from your **Favorites** workspace.

Favorites are personal: the links to the items that you see in the **Favorites** workspace are the favorites you have created.

When you open a workspace, you can identify your favorites because they have a star icon left of the link. When you open a form, report, or dashboard that is among your favorites, you can see the shaded icon (★) right of the title of the form, report, or dashboard. You can click the icon to remove the item from your favorites.

Managing Favorites: Process Activity

The following activity will help you manage favorites in Acumatica ERP.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company, and you want to use favorites to make frequently used items easy to access. You need to have at hand the predefined dashboard that has real-time information related to customer with the highest overdue balances. You also need to quickly access the reports that contain customer-related information.

Process Overview

In this process activity, you will do the following:

1. Add links to workspace items to your favorites
2. Remove a link to the workspace item from your favorites

System Preparation

Before you start managing favorites in Acumatica ERP, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.

Step 1: Adding Items to Your Favorites

Suppose that you need to add to your favorites the *Controller* dashboard and the *Customer Summary* (AR650500) and *Customer History Summary* (AR652100) reports.

To add links to the workspace items to your favorites, do the following:

1. On the main menu, click **Dashboards**.
2. In the **Dashboards** workspace, which opens, point at the link to the *Controller* workspace item and then click the star icon left of the link. Notice that the star icon is highlighted. You have added the *Controller* dashboard to your favorites.
3. On the main menu, click **Favorites** to open the **Favorites** workspace. The *Controller* link is displayed in the **Dashboards** category.
4. Click *Controller*.
5. In the *Controller* dashboard, which opens, view the **Remove from Favorites** (★) icon right of the title of the dashboard.

6. Search for the *Customer Summary* (AR650500) report. To do this, in the Search box, type `customer summary`. On the **Menu Items** tab of the Search form, in the **Reports** category, click *Customer Summary*.

7. On the title bar of the *Customer Summary* (AR650500) report form, which opens, click the **Add to Favorites** icon right of the title. You have added this report to your favorites.

8. Search for the *Customer History Summary* (AR652100) report. To do this, in the Search box, type `customer history summary`. On the **Menu Items** tab of the Search form, in the **Reports** category, click *Customer History Summary*.

9. On the title bar of the *Customer History Summary* (AR652100) report form, which opens, click the **Add to Favorites** icon right of the title. You have added this report to your favorites.

10. Open the **Favorites** workspace. Notice that the following is displayed in the workspace:

    - The link to the *Controller* dashboard, listed in the **Dashboards** category
    - The link to the *Customer Summary* (AR650500) report, listed in the **Receivables** category
    - The link to the *Customer History Summary* (AR652100) report, listed in the **Receivables** category

Step 2: Removing an Item from Your Favorites

Suppose that you no longer need in your favorites the link to the predefined dashboard, which you added to your favorites in the previous step.

To remove the link to the dashboard from your favorites, do the following:

1. Open the **Favorites** workspace.

2. Point at the link to the *Controller* dashboard, and click the star icon left of the link. Notice that the category remains, and the link is crossed out.

3. Close the **Favorites** workspace.

4. Reopen the **Favorites** workspace. Notice that neither the **Dashboards** category nor the link to the *Controller* dashboard is displayed.

Lesson 10: Learning About Acumatica Educational Resources

Learning About Acumatica Educational Resources

In the following sections, you will find information about accessing and using the Acumatica educational resources.

Learning Objectives

In this chapter, you will learn how to do the following:

- Use the Acumatica Portal
- Use the Acumatica Help portal
- Access the Acumatica Open University resources

Applicable Scenarios

You may want to learn about the Acumatica educational resources in either of the following cases:

- You are new to Acumatica ERP and need to explore the product's Help system, tools, and services, as well as the ways to access these resources.
- You are a more experienced user of Acumatica ERP and you may find it useful to learn about the Acumatica educational resources if you have not explored all of the available resources and want to broaden or deepen your knowledge of the product.

Acumatica Educational Resources

Acumatica educational resources are located on different websites. The website you use depends on your role in your company—such as a developer or an end user—and your purpose in obtaining information.

You will find further information on the educational resources in the following sections of the topic.

Acumatica Portal

By using the Acumatica Portal (*portal.acumatica.com*), you can do the following:

- Download add-on solutions, customization projects, and installation packages for supported versions of Acumatica ERP
- Read release notes and product guides
- Be informed about Acumatica news

- Find information about known product issues
- Learn about upcoming events
- Visit community forums

Help Portal

You can find Help information for the required product version on the Acumatica Help portal (*help.acumatica.com*). The Help portal is a collection of Help topics describing Acumatica ERP of multiple versions. The Help topics for each product version are located on a separate website. The Acumatica support team uses the Help portal to provide users with links to Help topics related to support cases.

Acumatica Open University

Open University (*openuni.acumatica.com*) is an internet portal with Acumatica educational resources for everyone who is interested in the Acumatica product offerings and technology.

Open University provides the following free and readily available training courses for Acumatica ERP users:

- End-user training courses, which are published only in the Open University website.
- Partner training courses. Users can take these training courses to obtain more extended knowledge of a particular functional area.

When you sign in to the Open University site by using social network accounts or Acumatica Portal accounts, you can access the training courses and files for training.

Each training course contains a description and resources that include guides and files for training, such as Excel spreadsheets, PowerPoint presentations, and visual aids; certain courses also include webinars that can be useful for self-studying. You can pass training courses in any order or select a recommended learning path.

A learning path is a set of courses that helps a learner to easily navigate through the course catalog. Acumatica Open University provides different learning paths, that are recommended based on the learner's specific role. By clicking any of the offered learning paths, you get the list of the courses that match your needs. After you complete all the courses in the learning path, you can update your social network profiles by listing specific skills to spotlight these skills.

Lesson 11: Managing Your Basic Working Environment

Managing Your Basic Working Environment: General Information

In the following sections, you will find information about basic settings of your user profile, which you can use to tailor your working environment to meet your needs.

Learning Objectives

In this chapter, you will learn how to do the following:

- Change your personal settings
- Select your time zone
- Select your default branch
- Define your home page
- Explain what system locale settings are

Applicable Scenarios

You manage your basic user profile settings in either of the following cases:

- When you are initially using Acumatica ERP, you may need to change the basic settings of your working environment that are available in your user profile.
- You have worked with Acumatica ERP for some time and need to make particular adjustments to your basic working environment.

Overview of Your User Profile Settings

On the *User Profile* (SM203010) form, you can customize your basic working environment settings. By using this form, you can change your personal settings (first name, last name, and phone number), time zone, default branch, default warehouse, home page, and regional (locale) settings. The changes you make on this form affect your user account only.

You can access the *User Profile* (SM203010) form by clicking **My Profile** in the User menu.

Default Branch

In some cases, multiple branches of a company are defined in the Acumatica ERP instance. Users can select the current branch (and company, if needed) from those to which they have access. Each user's current branch is inserted into the applicable boxes on forms and reports; this branch can be overridden, if needed.

If you work primarily in one of the branches to which you have access, you can specify a default branch. The default branch is then selected by the system as your current branch each time you sign in to Acumatica ERP. The system then inserts the name of this branch into the boxes on forms as you are creating system records and using mass processing forms, inquiry forms, and reports.

Time Zones

In Acumatica ERP, time zones are specified with respect to Greenwich Mean Time (GMT). A system administrator specifies the default time zone for all system users on the *Site Preferences* (SM200505) form.

If your time zone differs from the default time zone that is specified in the system, you can select your time zone on the *User Profile* (SM203010) form.

After you have selected your time zone, the date of creation for all the documents in the system will be displayed based on your time zone. Also, if you create a schedule to run a particular process at a specified time, the system will start the schedule based on your time zone.

Home Page

The home page is the first page that you see when you sign in to Acumatica ERP. On the *Site Preferences* (SM200505) form, a system administrator specifies a default home page to be used by all users of the site who have not specified a personal default home page. By default, for the *U100* dataset, the home page is the Welcome to Acumatica page. The Welcome to Acumatica page displays links to Acumatica resources, announcements, and news.

If you want to specify a different default home page for your user account than the one specified for the system as a whole, you can select your home page in the **Personal Settings** section of the *User Profile* (SM203010). As your home page, you can select a form or a dashboard.

Locale Settings

The default locale for Acumatica ERP is specified by a system administrator on the *System Locales* (SM200550) form.

You can select your default locale that determines the language to be used and change your regional settings, such as date, time, and number formats on the *User Profile* (SM203010) form. Dates, time and numbers are displayed in the system documents according to the local preferences that you have specified for your user account.

Managing Your Basic Working Environment: Process Activity

In the following activity, you will change some of the basic settings of your Acumatica ERP working environment that are available in your user profile, so that you understand how to make these changes in your own user profile.

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. So far, you have worked in New York for the SweetLife Head Office and Wholesale Center branch. Your time zone is Eastern Time, which is Greenwich Mean Time minus five hours.

You have just been transferred to the Service and Equipment Sales Center branch, and you are temporarily working from your home, which is located in Denver, Colorado. Your current time zone is Mountain Time, which is Greenwich Mean Time minus seven hours. For performing your job responsibilities, you need to frequently view sales prices for stock items on the *Sales Prices* (AR202000) form. You need to select your current time zone and to have sales prices for stock items displayed on your home page.

Prerequisites

You have explored the basic elements of the Acumatica ERP UI. For details, see *Learning About the Acumatica ERP UI: General Information*.

Process Overview

In this process activity, you will do the following:

1. Select your time zone for Acumatica ERP
2. Select your default branch
3. Define your home page

System Preparation

Before you start changing the basic settings of your Acumatica ERP working environment, make sure that the following tasks have been performed:

- You have installed an Acumatica ERP instance with the *U100* dataset, or a system administrator has performed this task for you.
- You have signed in to Acumatica ERP with the following credentials:
  - User name: *chubb*
  - Password: *123*

  For details, see *Accessing Acumatica ERP: Process Activity*.

Step 1: Selecting Your Time Zone

To select your time zone in Acumatica ERP, do the following:

1. Click the User menu button, and in the User menu, click **My Profile**. The *User Profile* (SM203010) form opens.

2. On the **General Info** tab (**Personal Settings** section), in the **Time Zone** box, select *(GMT-07:00) Mountain Time (US & Canada)*.

   If you know the exact name of the time zone, you can type a part of the name in the **Time Zone** box. The search results will be limited to the values that match your search request.

3. On the form toolbar, click **Save**. The times and dates shown in the system and in documents are displayed in time zone that you have selected.

   For instance, if another user located in the Eastern Time zone has created a document at 1:00 AM on January 16, 2020, David Chubb, who sees times and dates according to Mountain Time, will see a date of 1/15/2020 (because 1:00 AM Eastern Time is 11:00 PM Mountain Time on the previous day).

Step 2: Selecting Your Default Branch

To select your default branch, do the following:

1. While you are still viewing the *User Profile* (SM203010) form, in the **Default Branch** box (which is in the **Personal Settings** section of the **General Info** tab), click the magnifier icon.

2. In the lookup table, which opens, double-click *SWEETEQUIP* to select the Service and Equipment Sales Center branch as your default branch.

3. On the form toolbar, click **Save**.

   This change will not be applied during the current session; the next time you sign in, the system will set the default branch as your current branch, as you can see in the next several instructions.

4. Sign out of Acumatica ERP.

5. Sign in to Acumatica ERP again.

6. Open the Company and Branch Selection menu. On the menu, you can see a check mark next to the *Service and Equipment Sales Center* branch, which means that this is your current branch. Thus, the system has set your current branch to the default branch you have specified.

Step 3: Defining Your Home Page

As David Chubb, you want your home page to be set to the *Sales Prices* (AR202000) form so that you can immediately see the sales prices when you sign in (and any other time you click the Home button).

To define your homepage, do the following:

1. In the top pane, click the User menu button, and in the User menu, click **My Profile** to open the *User Profile* (SM203010) form.

2. In the **Home Page** box (which is in the **Personal Settings** section of the **General Info** tab), click the magnifier icon. The lookup table opens.

3. In the search box of the lookup table, type `sales prices` (the name of the form that will be David Chubb's home page) to limit the search results to the values that match your search request. Among the results will be the form you want, with *Sales Prices* in the **Title** column; double-click it to select the *Sales Prices* (AR202000) form as your home page. The system closes the lookup table and fills in the **Home Page** box.

4. On the form toolbar, click **Save**.

5. In the upper left corner of the Acumatica ERP screen, click the Home button to make sure that the *Sales Prices* (AR202000) form, which you defined as your home page, opens.