



# Basic System Administration

Anand Panchamia – [apanchamia@acumatica.com](mailto:apanchamia@acumatica.com)

Implementation Consultant

*Welcome! We will begin today's session 3 minutes after the hour.*

# Timing

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## Day One

**Monday October 7, 2019**

- 12:00 pm – 2:00 pm (ET)

## Day Two

**Tuesday October 8, 2019**

- 12:00 pm – 2:00 pm (ET)

## To Access your Instance of Acumatica:

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<https://training.acumatica.com/SysAdminBasic/>

- Username and password for the first 100 registered participants have been emailed.
- Using Local Environment
  - Acumatica ERP 2019 R1 Update 4 (19.104.0024) is installed

# Session Rules

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- Feel free to ask **questions** during the session. To do so please “raise your hand” via Ring Central and post your question using the Chat feature of Ring Central.
- Please fill in the evaluation **survey** at the end of the day two session.
- The session will be **recorded** and be posted on Acumatica Open University. The Training team will send a link after the session is published.
- This course should be completed on Acumatica 2019 R1.

# Agenda – Basic System Administration

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Day 1	Day 2
Company Story	Lesson 6: Users and Employees
Lesson 1: Enabling Features and License	Lesson 7: User Roles
Lesson 2: Tenants and Snapshots	Lesson 8: Site Security
Lesson 3: System Email Accounts	Lesson 9: Audit History
Lesson 4: Numbering Sequences	Lesson 10: Workspaces
Lesson 5: System Filters	Lesson 11: Customization Projects
	Lesson 12: Updating Acumatica

### SweetLife Fruits & Jams

*is a mid sized company located in New York City having 3 following branches*

1. Sweet Life Office & Wholesale Center – Is a jam factory with a large warehouse where fruits, purchased from wholesale vendors and jam is produced and stored.
2. Retail – A store with a small warehouse and they receive their merchandize from the main warehouse
3. Service Equipment Sales Center – Sells, installs, trains and services juicers sold to its customers

# Lesson 1 (pg 13)

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## Enabling Features and Activating the License

In this lesson, you will learn how to enable features in Acumatica ERP, activate the license, and review the license information

- Use Enable/Disable Features (CS100000) form to enable features in accordance with the license you have bought
- Use Activate License (SM201510) form to license your Acumatica ERP system
  - Use License Monitoring Console (SM604000) form to review applied license

## Lesson 2: Managing Tenants and Snapshots (pg 17)

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In this lesson, you will learn how to create a new tenant, create a company snapshot, restore a snapshot in a new tenant, and delete a tenant in Acumatica ERP by using the web interface.

Use Tenants (SM203520) form to create a tenant, create a company snapshot, restore the snapshot, and delete the tenant



## Lesson 3: System Email Accounts (pg 22)

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In this lesson, you will learn how to configure a system email account and specify a default system account in Acumatica ERP. You will also learn how to create a notification template and apply it in the system.

- Use System Email Accounts (SM204002) form to create an email account
- Use Email Preferences (SM204001) form to set default email account
  - Individual users can set their own default email account using User Profile (SM203010) form
- Use Notification Templates (SM204003) form to define email template

## Lesson 4: Numbering Sequence (pg 28)

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In this lesson, you will learn how to create numbering sequences that will be used to assign reference numbers to invoices and to sales orders. Once you complete this lesson, you will understand the process of creating numbering sequences for different entities.

- Use the Numbering Sequences (CS201010) form to create a numbering sequence
- Configure created numbering sequence in appropriate preferences screen.

## Lesson 5: System Filters (pg 33)

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In this lesson, you will learn how to add a system filter, modify it, and delete it.

Use the Filters (CS209010) form to create, edit, delete, and manage filters that are shared among all users of the system

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# End of Day 1

# Agenda – Basic System Administration

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Lesson 5: System Filters	Lesson 11: Updating Acumatica

## Lesson 6 – Users and Employees (pg 36)

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- Internal and External User
  - Creating a User
  - IP Filtering
- User Types
- Creating an Employee
- Associating Users to Employees

## Lesson 7 – Users Roles & Permissions (pg 44)

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- Permissions are assigned to Roles
- Advanced Security Option – Restriction Groups
- Pre-Defined User Roles
- Permission Levels – Suite, Module, Forms and Elements
- Concept of Special Permissions – Not Set and Inherited
- Management of Access Rights

## Lesson 8 – Site Security (pg 47)

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- Security Settings at Tenant Level
- Password Complexity
- Account Lock Out & Unlock Rules
- Forgot Password



## Lesson 9 – Auditing (pg 52)

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- Simple Access Level Audits
- Field Level Audits
- Configuring & Analyzing Audits

## Lesson 10 – Modern UI (pg 57)

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- Workspace, links, tiles, categories, quick and full menu
- Search
- Configuring the User Interface
- Favorites

## Lesson 11 – Updating Acumatica (pg 65)

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- Acumatica ERP Configuring Wizard
- Apply Updates
- Rebuilding Search Index
- Update Statistics

<https://www.surveymonkey.com/r/onlinesessions2019>



# Please fill out your survey!

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**Survey can be found on the Home page of the instance you have been provided. To return to the Home page, click the logo on the top left side of your Acumatica site.**



# Thank you!

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