

S100 System Installation and Maintenance

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ERP Implementation

Timing and Agenda

July 12, 2022 -10 AM -11 AM

Day 1

Lesson 1: Introduction to System Management

**Lesson 2: Installing the Acumatica ERP
Configuration Wizard**

**Lesson 3: Deploying Acumatica ERP Application
Instances**

July 13, 2022 -10 AM -11 AM

Day 2

Lesson 4: Enabling Features and Activating a License

Lesson 5: Maintenance

Timing and Agenda

July 14, 2022 -10 AM -11 AM

Day 3

Lesson 6: Upgrading

Lesson 7: Configuring Time-Outs and Reminders

**Lesson 8: Uninstalling the Acumatica ERP
Configuration Wizard and Deleting Application
Instances**

Lesson 9: Numbering Sequences

July 15, 2022 -10 AM -11 AM

Day 4

Lesson 10: Segmented Keys

Lesson 11: Wiki and Wiki Content



Day 1

Part 1: Installation

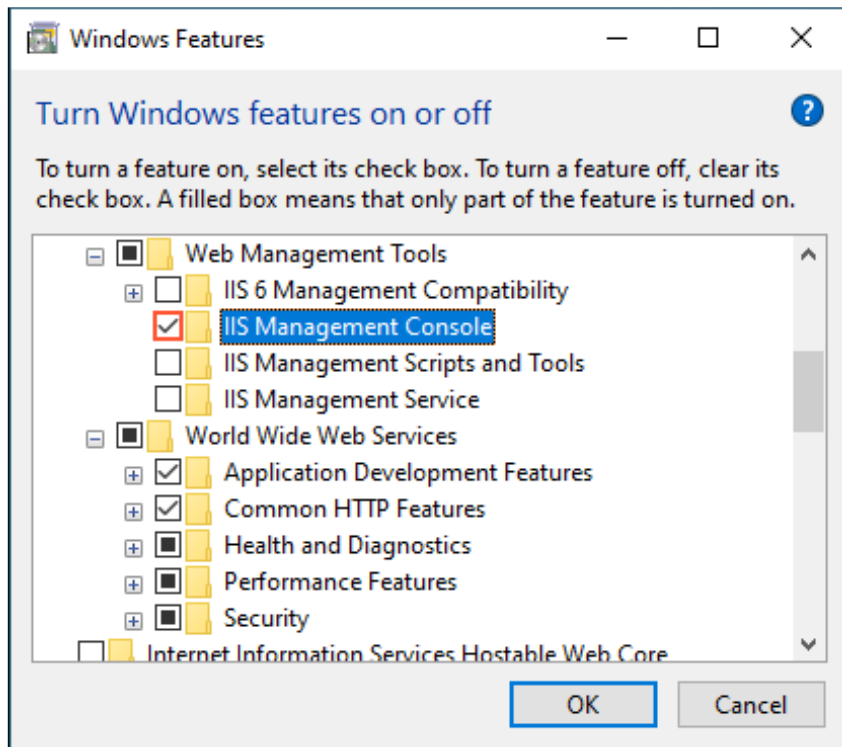
Lesson 1: Introduction to System Management

Learning Objectives

In this lesson, you will do the following:

- Learn about possible deployment configurations
- Learn about the minimum system requirements that should be met when you are installing the Acumatica ERP system locally
- Make sure that your computer meets the system requirements

Figure: The IIS Management Console feature



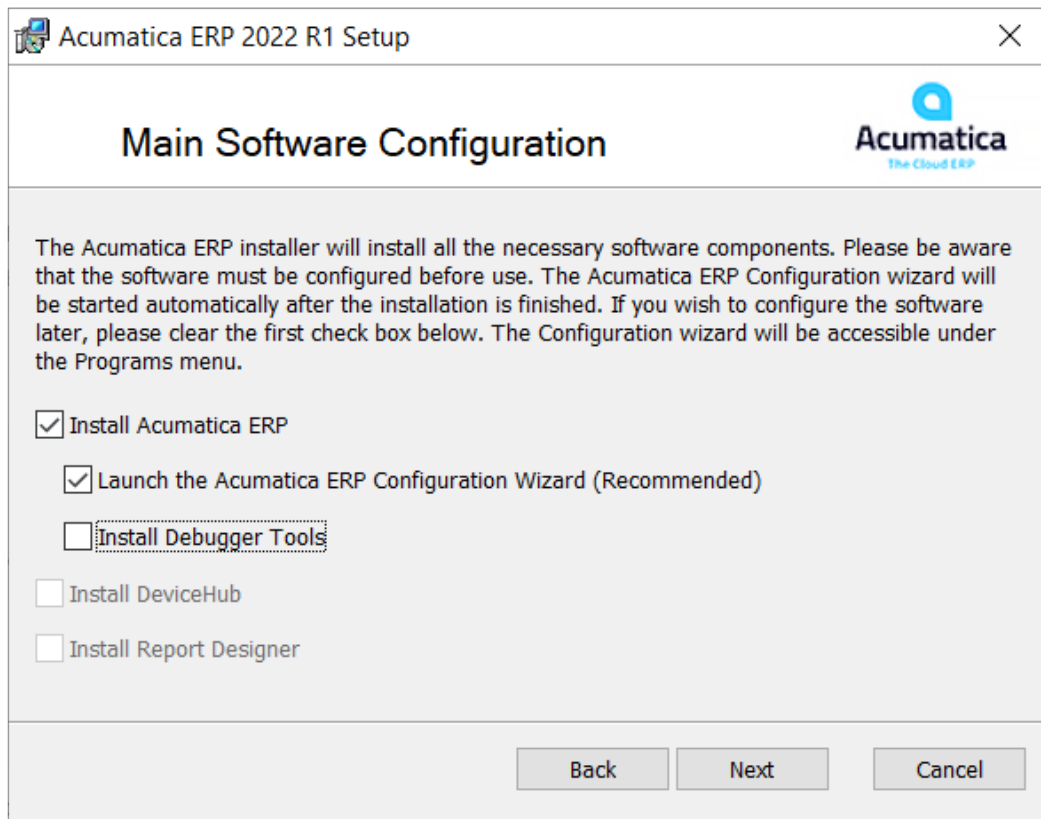
Lesson 2: Installing the Acumatica ERP Configuration Wizard

Learning Objectives

In this lesson, you will do the following:

- Obtain the Acumatica ERP installation package
- Install the Acumatica ERP Configuration Wizard application software


Figure: Acumatica ERP components to be installed



The screenshot shows the 'Acumatica ERP 2022 R1 Setup' window. The title bar includes a standard Windows icon, the text 'Acumatica ERP 2022 R1 Setup', and a close button. The main content area is titled 'Main Software Configuration' and features the Acumatica logo (a blue circle with a white 'a') and the text 'Acumatica The Cloud ERP'. Below the title, a paragraph of text states: 'The Acumatica ERP installer will install all the necessary software components. Please be aware that the software must be configured before use. The Acumatica ERP Configuration wizard will be started automatically after the installation is finished. If you wish to configure the software later, please clear the first check box below. The Configuration wizard will be accessible under the Programs menu.' There are five checkboxes listed: 'Install Acumatica ERP' (checked), 'Launch the Acumatica ERP Configuration Wizard (Recommended)' (checked), 'Install Debugger Tools' (unchecked and highlighted with a dashed border), 'Install DeviceHub' (unchecked), and 'Install Report Designer' (unchecked). At the bottom of the window, there are three buttons: 'Back', 'Next', and 'Cancel'.

Acumatica ERP 2022 R1 Setup

Main Software Configuration

 **Acumatica**
The Cloud ERP

The Acumatica ERP installer will install all the necessary software components. Please be aware that the software must be configured before use. The Acumatica ERP Configuration wizard will be started automatically after the installation is finished. If you wish to configure the software later, please clear the first check box below. The Configuration wizard will be accessible under the Programs menu.

☒ Install Acumatica ERP

☒ Launch the Acumatica ERP Configuration Wizard (Recommended)

☐ Install Debugger Tools

☐ Install DeviceHub

☐ Install Report Designer

Back Next Cancel

Lesson 3: Deploying Acumatica ERP Application Instances

Learning Objectives

In this lesson, you will do the following:

- Deploy an Acumatica ERP application instance
- Deploy an Acumatica ERP application instance with the demo data
- Deploy a multitenant Acumatica ERP application instance
- Change password for the first login

Figure: The settings of the MyCompany tenant

Acumatica ERP Configuration Wizard

Tenant Setup

If you wish to create a multi-tenant site, insert rows with appropriate information for each required tenant.

Installed tenants: [Reload the List](#)

ID	Login Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
2	MyCompany	<input type="checkbox"/>	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	Company


☐ Advanced Settings ☐ Secure Tenant on Login Form

[New](#) [Delete](#)

Version: 22.100.0178
<http://www.acumatica.com>

[< Back](#) [Next >](#)

Figure: The settings of the instance to be created

 Acumatica ERP Configuration Wizard

Confirm Configuration

The Configuration wizard has collected all the required information. You can review the collected information in the table.
Click Finish to proceed with configuration.

Parameter	Value
Configuration Mode	New Instance
Database Server Name	(local)
Database Server Authentication Type	Windows Authentication
Database	Existing
Database Name	AcumaticaS100
Database Update	Yes
Tenants Information	Total: '2', New: '0', Deleted: '0', Visible: '1', Demo: '0'
Split Tenants Information	Total Changed: '0', Splitted: '0', Shared: '0', Separated: '0'
DB Connection Authentication Type	Windows Authentication
DB Connection	Create New Login

Save Configuration

Version: 22.100.0178
<http://www.acumatica.com>

< Back

Finish

Figure: The list of Acumatica ERP installed sites

Acumatica ERP Configuration Wizard

Application Maintenance

Using this screen, you can create an additional site or manage existing ones.

Installed sites: Reload the List

Instance Name	Database	Site Version	DB Version	Site Path
✓ AcumaticaS100	(local)\AcumaticaS100	22.100.0178	22.100.0178	C:\Program Files\Acumatica ERP\AcumaticaS

<>

NewDeleteUpgrade▼

Change Database

Instance Info

Launch

Tenant Maintenance

Version: 22.100.0178
<http://www.acumatica.com>

< Back

Figure: Selection of a data set for a new tenant

Acumatica ERP Configuration Wizard

Tenant Setup

If you wish to create a multi-tenant site, insert rows with appropriate information for each required tenant.

Installed tenants: Reload the List

ID	Login Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
2	Company	<input checked="" type="checkbox"/>	I100	1	<input checked="" type="checkbox"/>	Company

SalesDemo

F200

F300

I100

U100

☐ Advanced Settings ☐ Secure Tenant on Login Form

New Delete

Version: 22.100.0178
<http://www.acumatica.com>

< Back Next >


Figure: The tenants to be created for the instance

Acumatica ERP Configuration Wizard

Tenant Setup

If you wish to create a multi-tenant site, insert rows with appropriate information for each required tenant.

Installed tenants: [Reload the List](#)

	ID	Login Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
	1		<input type="checkbox"/>	▼	▼	<input type="checkbox"/>	System
	2	Company	<input checked="" type="checkbox"/>	▼	1	<input type="checkbox"/>	Company
	3	Company2	<input checked="" type="checkbox"/>	▼	1	<input checked="" type="checkbox"/>	Company2
	4	Company3	<input checked="" type="checkbox"/>	▼	2	<input checked="" type="checkbox"/>	Company3

☒ Advanced Settings ☐ Secure Tenant on Login Form

[New](#) [Delete](#)

Version: 22.100.0178
<http://www.acumatica.com>

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A close-up photograph of a hand pouring beer from a metal tap into a tall glass. The glass features a logo with a spade and the text "Devil's Peak". The background is blurred, showing a bar setting with other patrons.

Day 2

Lesson 4: Enabling Features and Activating a License

Learning Objectives

In this lesson, you will do the following:

- Enable feature groups for an Acumatica ERP application instance
- Learn how to activate a full-product Acumatica ERP license

Figure: Enabling features

Acumatica Search... 🔍 ↻

★ Favorites

📊 Data Views

🕒 Time and Expenses

📅 Finance

💰 Banking

⊖ Payables

⊕ Receivables

⋮ More Items

Enable/Disable Features ★

↻ MODIFY ENABLE

- ☐ Custom Order Types
- ☐ Purchase Requisitions
- ☐ Advanced SO Invoices
- ☐ Vendor Relations
- ☐ Warehouse Management
 - ☐ Fulfillment
 - ☐ Advanced Picking
- ☐ Receiving
- ☐ Inventory Operations
- ☐ Cart Tracking
- ☒ Customer Management
 - ☐ Case Management
- ☐ Lead/Contact Duplicate Validation
- ☐ Sales Quotes
- ☐ Address Lookup Integration

Figure: Activated license

Activate License

↶ ENTER LICENSE KEY UPLOAD LICENSE FILE UPDATE LICENSE DELETE LICENSE

Status:	Valid	✓	
Valid From:	8/12/2013 12:00:00 AM	Valid To:	6/25/2021 12:00:00 AM
Number of Users:	1000	Version:	6.00
		Number of Tenants:	50

↶ + × |⇄| ✕

Activated	Feature Name
> <input checked="" type="checkbox"/>	Business Account Locations
<input checked="" type="checkbox"/>	Active Directory and Other External SSO
<input checked="" type="checkbox"/>	Address Lookup Integration

Part 2: Maintenance

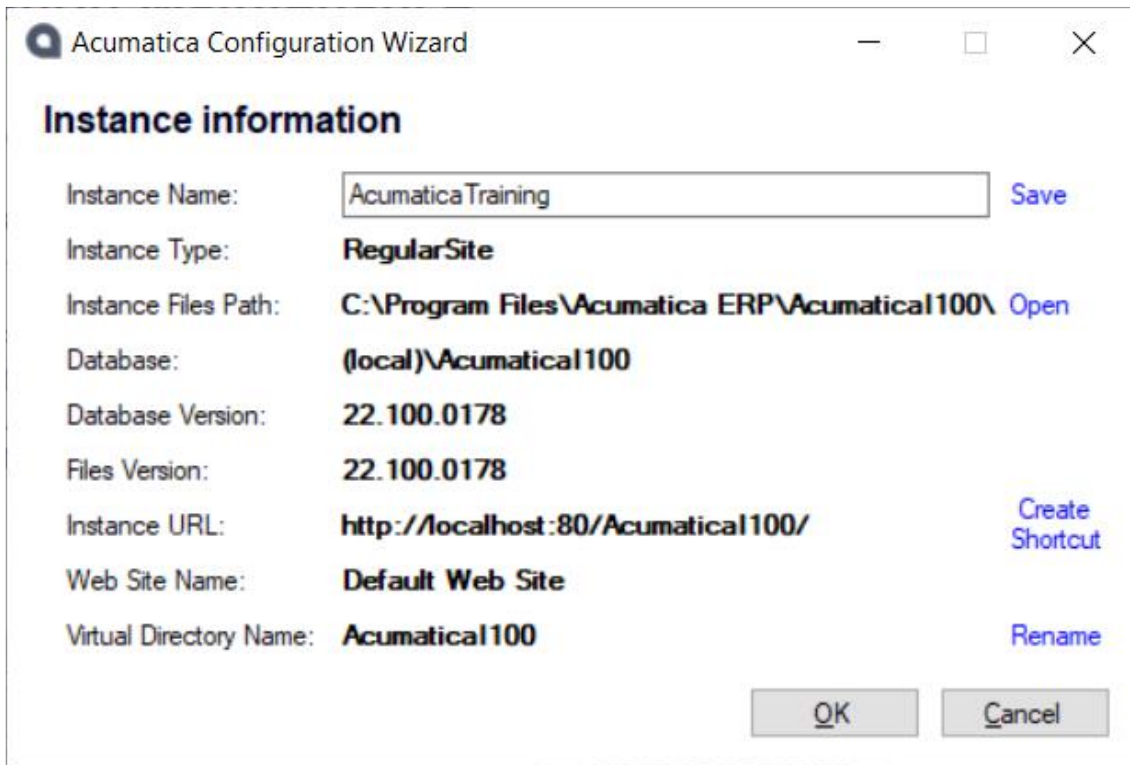
Lesson 5: Maintenance

Learning Objectives

In this lesson, you will do the following:

- View the details of a application instance
- Change a database of an application instance
- Make an existing tenant invisible
- Create a new child tenant for the application instance and insert demo data to this tenant

Figure: The updated instance name



The image shows a screenshot of the 'Acumatica Configuration Wizard' window. The title bar includes the Acumatica logo and the text 'Acumatica Configuration Wizard'. The window has standard Windows window controls (minimize, maximize, close). The main content area is titled 'Instance information' and contains several configuration fields:

- Instance Name:** A text box containing 'AcumaticaTraining'. To its right is a blue 'Save' link.
- Instance Type:** A dropdown menu showing 'RegularSite'.
- Instance Files Path:** A text box containing 'C:\Program Files\Acumatica ERP\Acumatical100\'. To its right is a blue 'Open' link.
- Database:** A text box containing '(local)\Acumatical100'.
- Database Version:** A text box containing '22.100.0178'.
- Files Version:** A text box containing '22.100.0178'.
- Instance URL:** A text box containing 'http://localhost:80/Acumatical100/'. To its right is a blue 'Create Shortcut' link.
- Web Site Name:** A text box containing 'Default Web Site'.
- Virtual Directory Name:** A text box containing 'Acumatical100'. To its right is a blue 'Rename' link.

At the bottom right of the window are two buttons: 'OK' and 'Cancel'.

Figure: Selection of an existing database

Acumatica ERP Configuration Wizard

Database Configuration

You can either select an existing database from the list or create a new one.

☐ Create a new database New database's name:

☒ Connect to an existing database Database filter:

Available databases on server:

Acumatical100
AcumaticaMultiple
AcumaticaS100

Acumatica database AcumaticaS100 (version 22.100.0178) has been selected.

The database has current version.

☐ Repair database
☐ Shrink data after repair

Version: 22.100.0178
<http://www.acumatica.com>

Figure: Error indicating that only an invisible tenant can be used as a parent

Acumatica ERP Configuration Wizard

Tenant Setup

If you wish to create a multi-tenant site, insert rows with appropriate information for each required tenant.

Installed tenants: Reload the List


	ID	Login Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
	1		<input type="checkbox"/>			<input type="checkbox"/>	1
▶	2	MyCompany	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	Company
	3	Company	<input checked="" type="checkbox"/>		2	<input checked="" type="checkbox"/>	Company

☒ Advanced Settings Delete

Version: 22.100.0178
<http://www.acumatica.com>

< Back Next >

Acumatica Configuration Wizard

 An error occurred in '2' tenant.
One or more visible tenants is used as parent for other tenants. Please use only invisible tenants as a parent.

Show Inner Messages Show Call Stack

OK



Day 3

Lesson 6: Upgrading

Learning Objectives

In this lesson, you will do the following:

- Upgrade the Acumatica ERP Tools
- Upgrade the application instance
- Upgrade only the site of the application instance

Figure: Application Maintenance page




Acumatica ERP Configuration Wizard

Application Maintenance

Using this screen, you can create an additional site or manage existing ones.

Installed sites:

Reload the List

Instance Name	Database	Site Version	DB Version	Site Path
 AcumaticaMultiple	(local)\AcumaticaMultiple	22.100.0178	22.100.0178	C:\Program Files\Acumatica ERP\AcumaticaM
 AcumaticaS100	(local)\AcumaticaS100	22.101.0085	22.101.0085	C:\Program Files\Acumatica ERP\AcumaticaS
 AcumaticaTraining	(local)\AcumaticaS1...	22.100.0...	22.101.0...	C:\Program Files\Acumatica ERP\Acum

< >

New

Delete

Upgrade ▼

Change Database

Instance Info

Launch

Tenant Maintenance

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<http://www.acumatica.com>

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Figure: Successful update of one instance

Acumatica ERP Configuration Wizard

Application Maintenance

Using this screen, you can create an additional site or manage existing ones.

Installed sites: [Reload the List](#)

Instance Name	Database	Site Version	DB Version	Site Path
⚠ AcumaticaMultiple	(local)\AcumaticaMultiple	22.100.0178	22.100.0178	C:\Program Files\Acumatica ERP\AcumaticaM
✅ AcumaticaS100	(local)\AcumaticaS100	22.101.0085	22.101.0085	C:\Program Files\Acumatica ERP\AcumaticaS
❌ AcumaticaTraining	(local)\AcumaticaS1...	22.100.0...	22.101.0...	C:\Program Files\Acumatica ERP\Acun

< >

[New](#) [Delete](#) [Upgrade](#) ▼ [Change Database](#) [Instance Info](#)

[Launch](#) [Tenant Maintenance](#)

Version: 22.101.0085
<http://www.acumatica.com>

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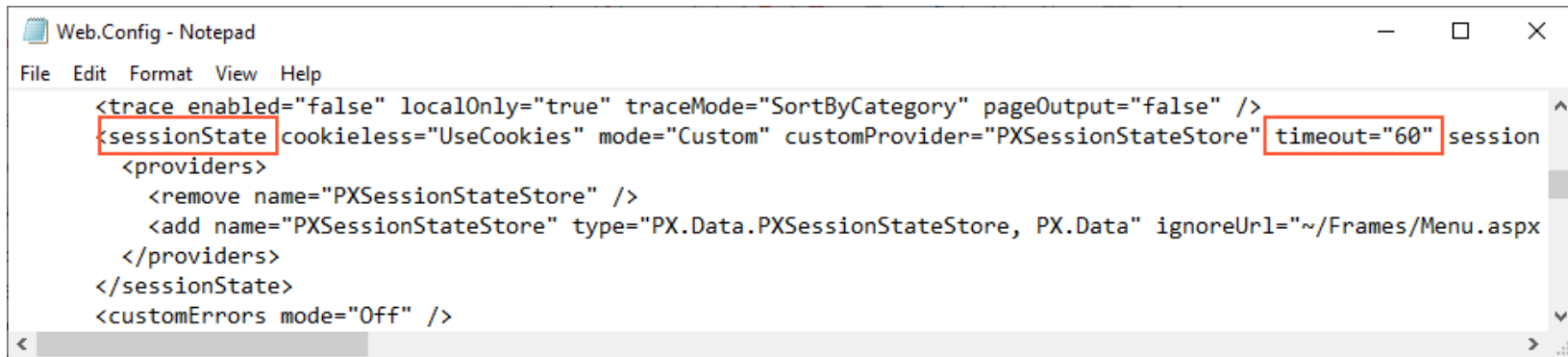
Lesson 7: Configuring Time-Outs and Reminders

Learning Objectives

In this lesson, you will do the following:

- Specify a new session time-out setting
- Specify a new cookie time-out setting
- Specify a new query time-out setting
- Specify a new report query time-out setting
- Turn on reminders

Figure: The updated session timeout



```
Web.Config - Notepad
File Edit Format View Help
<trace enabled="false" localOnly="true" traceMode="SortByCategory" pageOutput="false" />
<sessionState cookieless="UseCookies" mode="Custom" customProvider="PXSessionStateStore" timeout="60" session
  <providers>
    <remove name="PXSessionStateStore" />
    <add name="PXSessionStateStore" type="PX.Data.PXSessionStateStore, PX.Data" ignoreUrl="~/Frames/Menu.aspx
  </providers>
</sessionState>
<customErrors mode="Off" />
```

Figure: The idle time-out value of the application pool

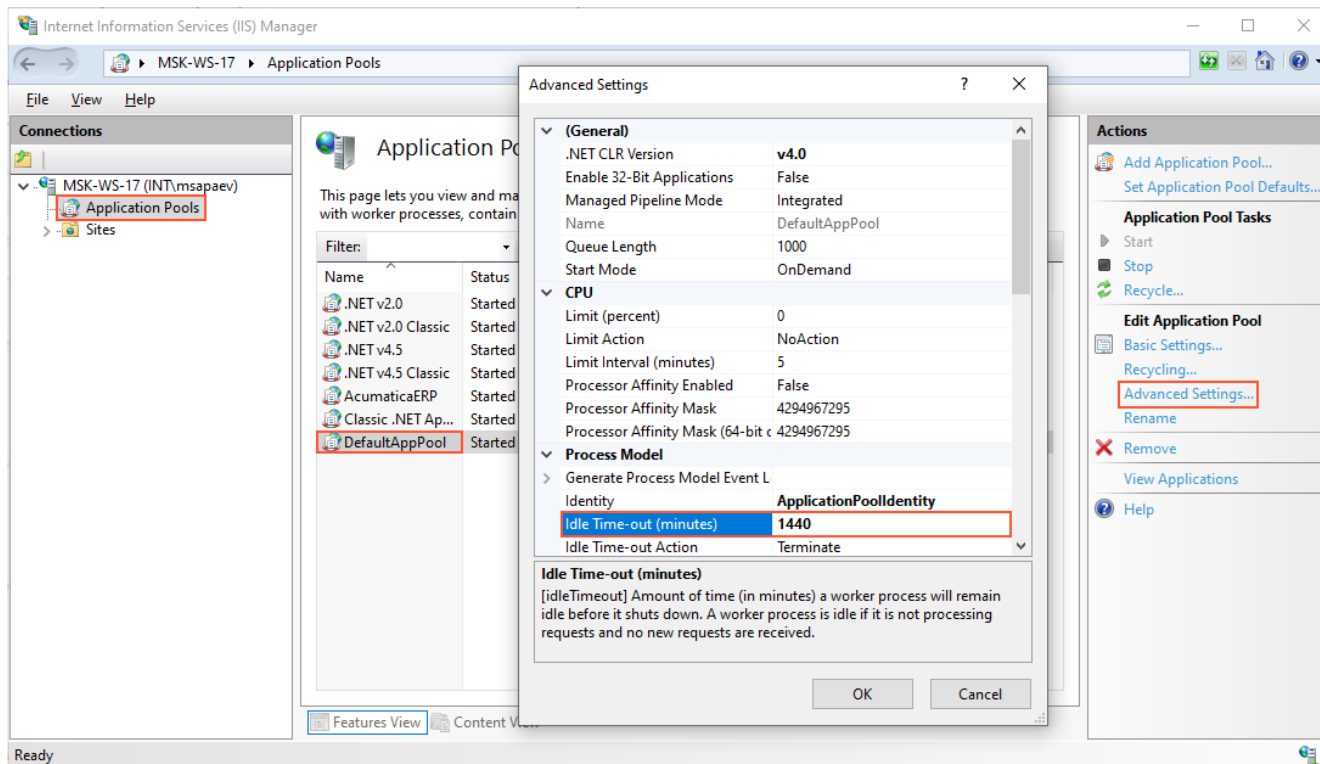
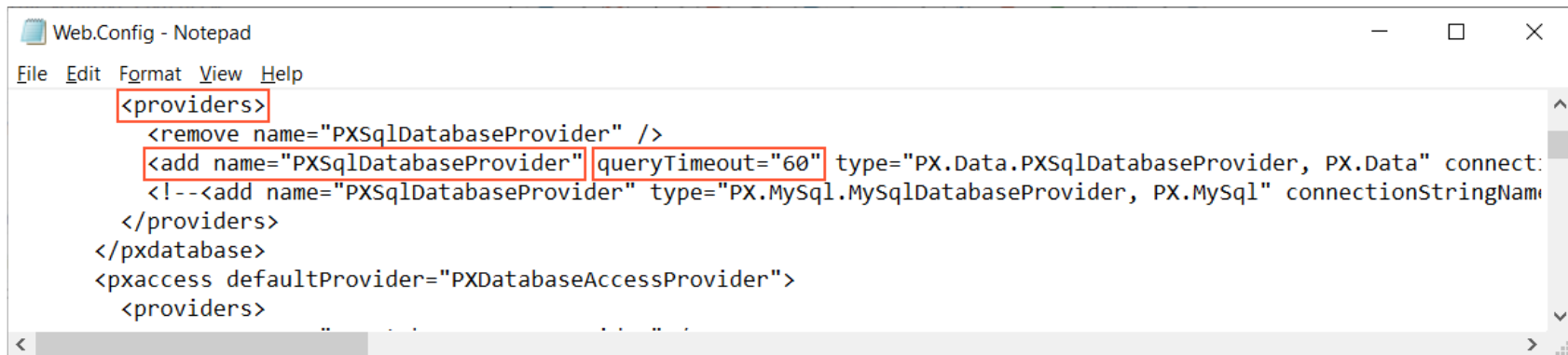
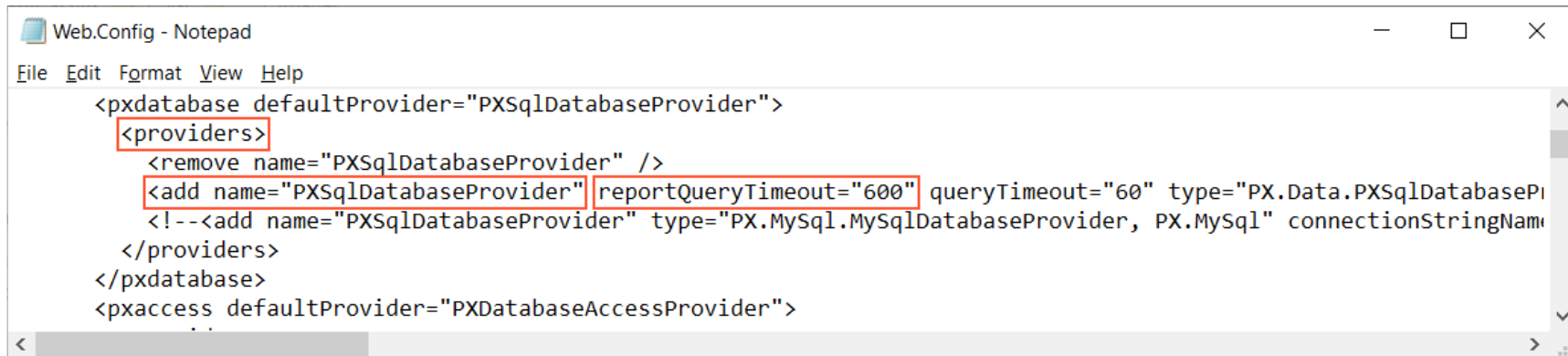


Figure: The updated query timeout




```
Web.Config - Notepad
File Edit Format View Help
<providers>
  <remove name="PXSqlDatabaseProvider" />
  <add name="PXSqlDatabaseProvider" queryTimeout="60" type="PX.Data.PXSqlDatabaseProvider, PX.Data" connect:
  <!--<add name="PXSqlDatabaseProvider" type="PX.MySql.MySqlDatabaseProvider, PX.MySql" connectionStringName
</providers>
</pxdatabase>
<pxaccess defaultProvider="PXDatabaseAccessProvider">
  <providers>
```

Figure: The updated report timeout



```
Web.Config - Notepad
File Edit Format View Help
<pxdatabase defaultProvider="PXSqlDatabaseProvider">
  <providers>
    <remove name="PXSqlDatabaseProvider" />
    <add name="PXSqlDatabaseProvider" reportQueryTimeout="600" queryTimeout="60" type="PX.Data.PXSqlDatabaseProvider" />
    <!--<add name="PXSqlDatabaseProvider" type="PX.MySql.MySqlDatabaseProvider, PX.MySql" connectionStringName="MySqlConnection" />-->
  </providers>
</pxdatabase>
<pxaccess defaultProvider="PXDatabaseAccessProvider">
```

Figure: The updated reminder functionality settings



```
Web.Config - Notepad
File Edit Format View Help
</connectionStrings>
<appSettings>
  <clear />
  <add key="HomePageUrl" value="https://www.acumatica.com/embed-api/welcome-page/" />
  <add key="aspnet:UseTaskFriendlySynchronizationContext" value="True" />
  <add key="Version" value="20.201.0051" />
  <add key="DefaultWikiCSS" value="App_Themes\Wiki.css" />
  <add key="ActivityTotalsVisible" value="false" />
  <add key="ReminderVisible" value="true" />
  <add key="ReminderRequestPeriod" value="60" />
  <add key="ReminderActiveMode" value="true" />
  <add key="aspnet:IgnoreFormActionAttribute" value="true" />
```

Lesson 8: Uninstalling the Acumatica ERP Configuration Wizard and Deleting Application Instances

Learning Objectives

In this lesson, you will do the following:

- Learn about the deletion of application instances
- Learn about uninstalling the Acumatica ERP Configuration Wizard
- Delete an application instance by using the Acumatica ERP Configuration Wizard

Figure: Deletion of the selected instance

Acumatica ERP Configuration Wizard

Application Maintenance

Using this screen, you can create an additional site or manage existing ones.

Installed sites: Reload the List

Instance Name	Database	Site Version	DB Version	Site Path
✖ AcumaticaMultiple	(local)\AcumaticaM...	22.102.0...	22.101.0...	C:\Program Files\Acumatica ERP\Acum...
✓ AcumaticaS100	(local)\AcumaticaS100	22.101.0085	22.101.0085	C:\Program Files\Acumatica ERP\AcumaticaS...
✓ AcumaticaTest	(local)\AcumaticaTest	22.101.0085	22.101.0085	C:\Program Files\Acumatica ERP\AcumaticaTe...
✓ Acumatica Test1	LOCALHOST\DB1	22.101.0085	22.101.0085	C:\Program Files\Acumatica ERP\AcumaticaTr...
✓ Acumatica Test2	LOCALHOST\DB2	22.101.0085	22.101.0085	C:\Program Files\Acumatica ERP\AcumaticaTe...
✓ Acumatica Training	(local)\AcumaticaS100	22.101.0085	22.101.0085	C:\Program Files\Acumatica ERP\Acumatical1...

< >

New Delete Upgrade ▼ Change Database Instance Info

Launch Tenant Maintenance

Version: 22.101.0085
<http://www.acumatica.com>

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Part 3: System Configuration and Management

Lesson 9: Numbering Sequences

Learning Objectives

In this lesson, you will do the following:

- Learn about numbering sequences and subsequences
- Create a new numbering sequence
- Create a numbering sequence that uses prefixes

Figure: Numbering sequence for service orders

Numbering Sequences ☆

📁 ↶ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵

* Numbering ID: 🔍

* Description:

☐ Manual Numbering

* New Number Symbol:

🔄 + ✖️ ⇄ ☒

📄	* Start Number	* End Number	* Start Date	* Last Number	* Warning Number	* Numbering Step
↙	<input type="text" value="0000000"/>	<input type="text" value="9999999"/>	1/1/1900	0000000	9999899	1

Figure: Numbering sequence for vendors

Numbering Sequences ☆

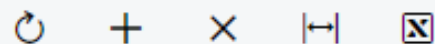


* Numbering ID:

* Description:

☐ Manual Numbering

* New Number Symbol:



	* Start Number	* End Number	* Start Date	* Last Number	* Warning Number	* Numbering Step
↙	V000000	V999999	1/1/1900	V000000	V999899	1



Day 4

Lesson 10: Segmented Keys

Learning Objectives

In this lesson, you will do the following:

- Learn about the predefined set of segmented keys
- Learn about the configuration of the keys
- Learn about validation of segments
- Configure a segmented key with one segment
- Configure a key with multiple segments
- Populate a list of possible segment values
- Learn about specifics of the BIZACCT key
- Configure the BIZACCT key

Figure: Adjustments to the ACCOUNT segment key

Segmented Keys ☆ CUSTOMIZATION TOOLS ▾

📁 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩

* Segmented Key ID: 🔍 Max Length: 10

Parent: _____ Length:

Lookup Mode: By Segmented Key Segments: 1

☐ Allow Adding New Values On the Fly

Specific Module: 🔍

Numbering ID: 🔍 ✎

* Description:

🔄 + × VIEW SEGMENT ⏪ ⏩

📄	Segment ID	* Description	Length	Align	Edit Mask	Case Conversion	Valida	Auto Number	* Separator
✎	1	GL Account	<input type="text" value="6"/>	Left	<input type="text" value="Numeric"/>	Uppercase	<input type="checkbox"/>	<input type="checkbox"/>	-

Figure: Adjustments to the SUBACCOUNT segment key

Segmented Keys ☆ CUSTOMIZATION TOOLS ▾

📁 ↶ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵

* Segmented Key ID: SUBACCOUNT 🔍 Max Length: 30
Parent: Length: 5
Lookup Mode: By Segment: All Avail. Seg... ▾ Segments: 2
☒ Allow Adding New Values On the Fly
Specific Module: 🔍
Numbering ID: 🔍 ✎
* Description: Subaccount

🔄 + × VIEW SEGMENT ⏪ ⏴

📄	Segment ID	* Description	Length	Align	Edit Mask	Case Conversion	Validate	Auto Number	* Separator
	1	Department	3	Left	Alphanumeric	Uppercase	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-
✎	2	Sales Region	2	Left	Unicode	Uppercase	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-

Figure: Values defined for the Department segment of the SUBACCOUNT key

Segment Values ☆ CUSTOMIZATION TOOLS ▾

📁 ↶ ⏪ ⏩ ↷

Segmented Key ID: SUBACCOUNT 🔍 ✎ ^

Segment ID: 1 🔍

* Description: Department

🔄 + × ⏮ ☒ ⏭

* Value	Description	Active
000	Non-Specific	<input checked="" type="checkbox"/>
ADM	Administrative	<input checked="" type="checkbox"/>
CON	Consulting	<input checked="" type="checkbox"/>
DEV	Development	<input checked="" type="checkbox"/>
FIN	Finance	<input checked="" type="checkbox"/>
SAL	Sales	<input checked="" type="checkbox"/>

Figure: Values uploaded for the Sales Region segment of the SUBACCOUNT key

Segment Values

CUSTOMIZATION

TOOLS

Save

Undo

Previous

Back

Forward

Next

Refresh

00:00:00

Segmented Key ID:

SUBACCOUNT

Segment ID:

2

* Description:

Sales Region

Refresh

+

×

↔










☒


⬆






* Value	Description	Active
00	Non-specific	<input checked="" type="checkbox"/>
AK	ALASKA	<input checked="" type="checkbox"/>
AL	ALABAMA	<input checked="" type="checkbox"/>
AR	ARKANSAS	<input checked="" type="checkbox"/>



Figure: Adjustments to the VENDOR segment key

Segmented Keys CUSTOMIZATION TOOLS ▾

* Segmented Key ID: Max Length:
Parent: Length:
Lookup Mode: Segments:
☐ Allow Adding New Values On the Fly
Specific Module:
Numbering ID: 
* Description:

   VIEW SEGMENT  

	Segment ID	* Description	Override	Length	Align	Edit Mask	Case Conversion	Validate	Auto Number	* Separator
	1	Business Account	<input type="checkbox"/>	15	Left	Unicode	Uppercase	<input type="checkbox"/>	<input type="checkbox"/>	-

Lesson 11: Wiki and Wiki Content

Learning Objectives

In this lesson, you will do the following:

- Create a wiki
- Create a wiki article and add it to the wiki
- Create an article with the attached file
- Learn about role-based access to wiki articles

Figure: Reviewing Installation Guide node

Wiki Site Map ☆

CUSTOMIZATION TOOLS ▾

SAVE CANCEL

🔄

COMPANY

📁 Installation Guide

📁 Installing Acumatica ERP

📁 Licensing and Activating Acumatica ERP

📁 Uninstalling Acumatica ERP

📁 Templates

📁 Installing Acumatica Framework

📁 Preparing for Installing Acumatica ERP

📁 Using the Command-Line Tool

📁 Deleted Item

📁 Updating Acumatica ERP

📁 Construction

📁 Prices and Discounts

📁 Acumatica Customization Guide

🔄 X SELECT ALL VIEW ARTICLE ↑ ↓ |









	Selected	ID	Name	Folder	Number
> 📁	<input type="checkbox"/>	Acumatica_Installation_Guide	Acumatica ERP and Acumatica Framework...	<input type="checkbox"/>	1.00
📄	<input type="checkbox"/>	System_Requirements	System Requirements for Acumatica ERP...	<input type="checkbox"/>	2.00
📄	<input type="checkbox"/>	System_Requirements_Studio	System Requirements for Acumatica Fra...	<input type="checkbox"/>	3.00
📄	<input type="checkbox"/>	System_Requirements_PCP_PCS_Licen...	Typical Hardware and Virtual Machine Co...	<input type="checkbox"/>	4.00
📄	<input type="checkbox"/>	PreInstall_System_Configuration	Preparing for Installing Acumatica ERP	<input checked="" type="checkbox"/>	5.00
📄	<input type="checkbox"/>	Installing_Acumatica	Installing Acumatica ERP	<input checked="" type="checkbox"/>	9.00
📄	<input type="checkbox"/>	Installing_Acumatica_Studio	Installing Acumatica Framework	<input checked="" type="checkbox"/>	28.00
📄	<input type="checkbox"/>	Licensing_Acumatica	Licensing and Activating Acumatica ERP	<input checked="" type="checkbox"/>	33.00
📄	<input type="checkbox"/>	Maintaining_Framework	Maintaining Acumatica Framework	<input type="checkbox"/>	36.00

< < > >|

Figure: A new wiki

Wiki

NOTESFILESCUSTOMIZATIONTOOLS



CLEAR WIKI

GENERAL

* ID:

Company Processes

* Title:

Company Internal Processes

Created by:

admin admin

Created:

4/13/2022 1:05 PM

APPROVAL

☒ Hold on Edit

☐ Require Approval

* Approval Group:

Approver ID:

WIKI SETTINGS

ACCESS RIGHTSTAGSLOCALES

MODERN UI

☒ Show on Help Dashboard

Section:

Administrator

Sequence:

60

Default Article:

CLASSIC UI

Site Map Location:

Help

Site Map Title:

Company Internal Processes

LOOK AND FEEL

Style:

Help

Print Style:


Help Print

Article Type:

Article

DASHBOARD DESCRIPTION

Internal processes of the company.

 **Acumatica**
The Cloud ERP

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Figure: The card of the new wiki on the Help dashboard

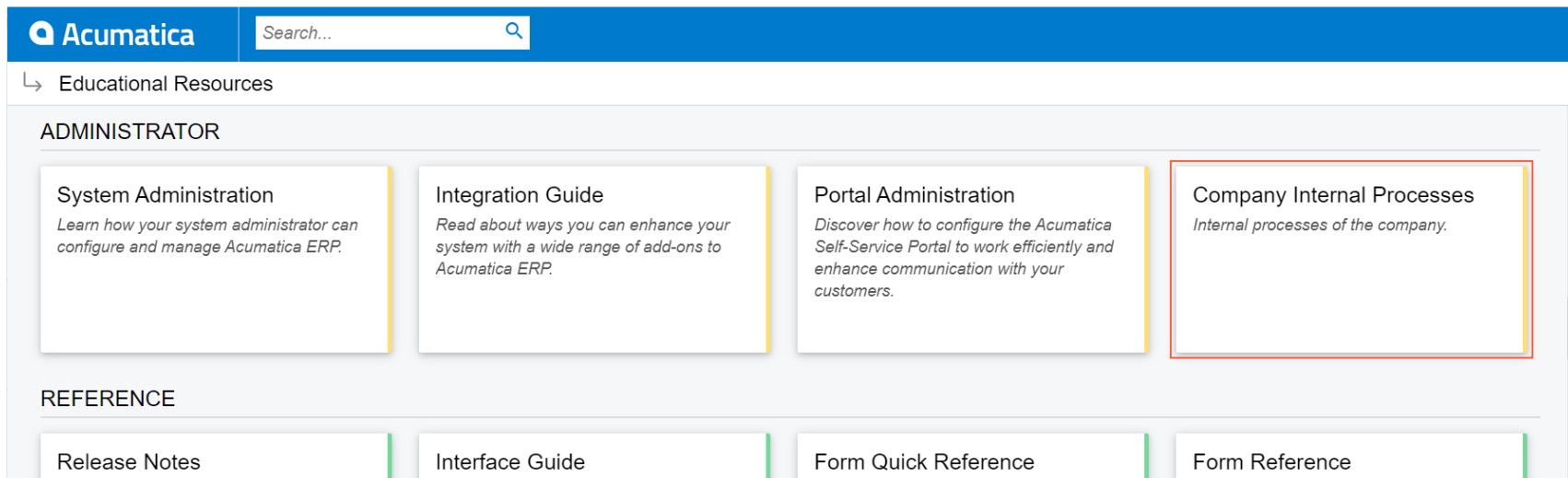


Figure: The created article

TOOLS ▾

📄 ↶ 📎 ATTACH

CONTENT PROPERTIES CATEGORY PRODUCT ATTACHMENTS ACCESS RIGHTS HISTORY RESPONSES

Article ID:	QuotationProcess	Parent Folder:	Company Internal Processes 🔍
Name:	Quotation Process	Status:	Hold <input checked="" type="checkbox"/> Hold
Article Type:	Wiki ▾	Published Date:	12/3/2020 10:1 <input type="checkbox"/> Folder

🔍 📎 **B** *I* U ~~S~~ 🔗 H₁ H₂ H₃ H₄ x₂ x² ☰ ☐ <> ☒ 🔧 📏 ⚡ ⚠️ ✖️ ✓

Step 1. Create a service order type with the "Quote" behavior on the [HelpRoot_FormReference\FS_20_23_00|Service Order Types] ([~/?ScreenId=FS202300|FS202300]) form.
{br}{br}

Step 2. Create a quote on the [HelpRoot_FormReference\FS_30_01_00|Service Orders] ([~/?ScreenId=FS300100|FS300100]) form by selecting a service order type with the "Quote" behavior and specifying the following information for the service order, as described in Service Order Entry:

- *The customer and its location
- *The company's branch, its location, and optionally, the room at the branch location where the appointments take place
- *The date and time information of the service order
- *The services that are provided for this service order
- *Optional: The included inventory items

Figure: The article with the attachment

TOOLS ▾

📁 ↶ 📎 ATTACH

CONTENT PROPERTIES CATEGORY PRODUCT ATTACHMENTS ACCESS RIGHTS HISTORY RESPONSES

* Article ID:	Logo	Parent Folder:	Company Internal Processes 🔍
* Name:	Logo Usage	Status:	Hold <input checked="" type="checkbox"/> Hold
Article Type:	Wiki ▾	Published Date:	<input type="checkbox"/> Folder

🔍 **B** *I* U ~~S~~ 🔗 H₁ H₂ H₃ H₄ x₂ x² ☰ ☐ <> ☒ 🔧 ⚙️ 💡 ⚠️ ✖️ ✔️

Please follow the usage rules shown here when using our logos.{br}{br}.
[Image:Logo\Acumatica_Logo.jpg]

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Thank you

Chris Pelton