Acumatica
The Cloud ERP

S140 Customization Projects

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Services | Acumatica

Timing and Agenda

Mon, July 20, 2020 10:00 AM – 11:00 AM PT

Day 1

Course Prerequisites

Part 1: Preparing for Customization

Part 2: Customizing Acumatica ERP for Business Process Support

Part 3: Customizing Screens (partly)

Tue, July 21, 2020 10:00 AM – 11:00 AM PT

Day 2

Part 3: Customizing Screens

Configure the Layout of a Form

Add an Action to a Form

Configure Conditions

Add User-Defined Fields

Timing and Agenda

Wed, July 22, 2020 10:00 AM – 11:00 AM PT

Day 3

Part 4: Managing Customization Projects

Part 5: Customizing the Appearance of the

Acumatica ERP Instance

Change the Company Logo & Images on the Welcome Page

Customize the Color Theme

Configure a Workspace

Course Prerequisites

Initial Configuration:

- Enable the ***Business Account Locations*** feature
- Select *YOGIFON* as **Default Branch** for your user account

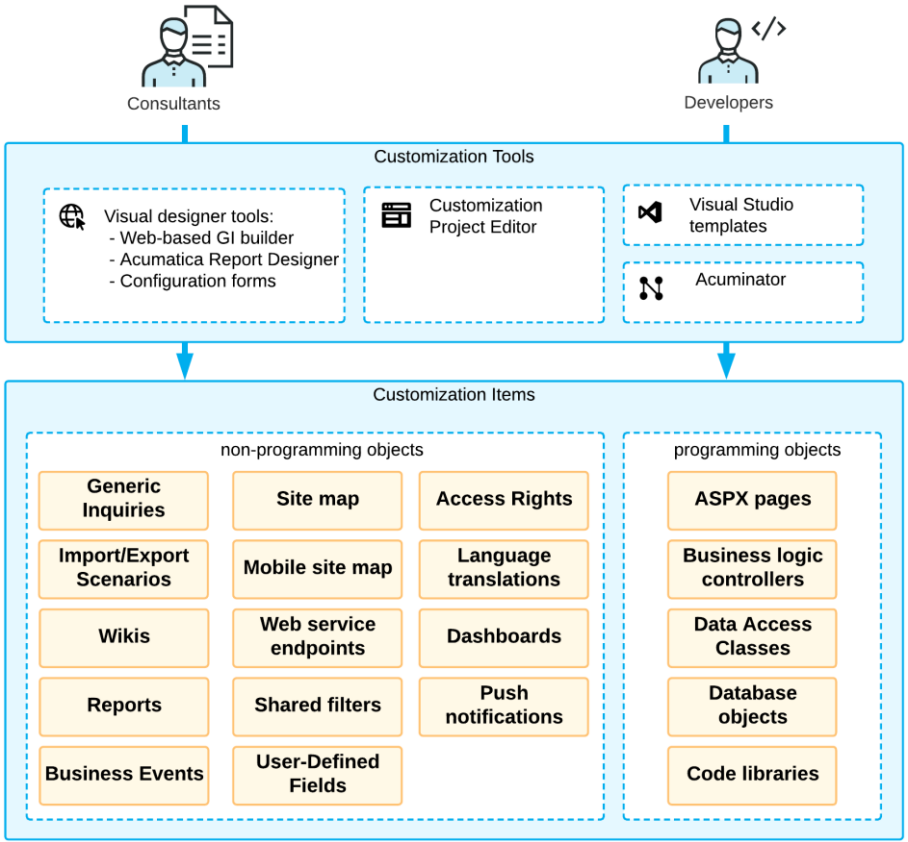
Customization Projects

Company Story and Customization Description

Customization Projects

Part 1: Preparing for Customization

The Customization of Acumatica ERP



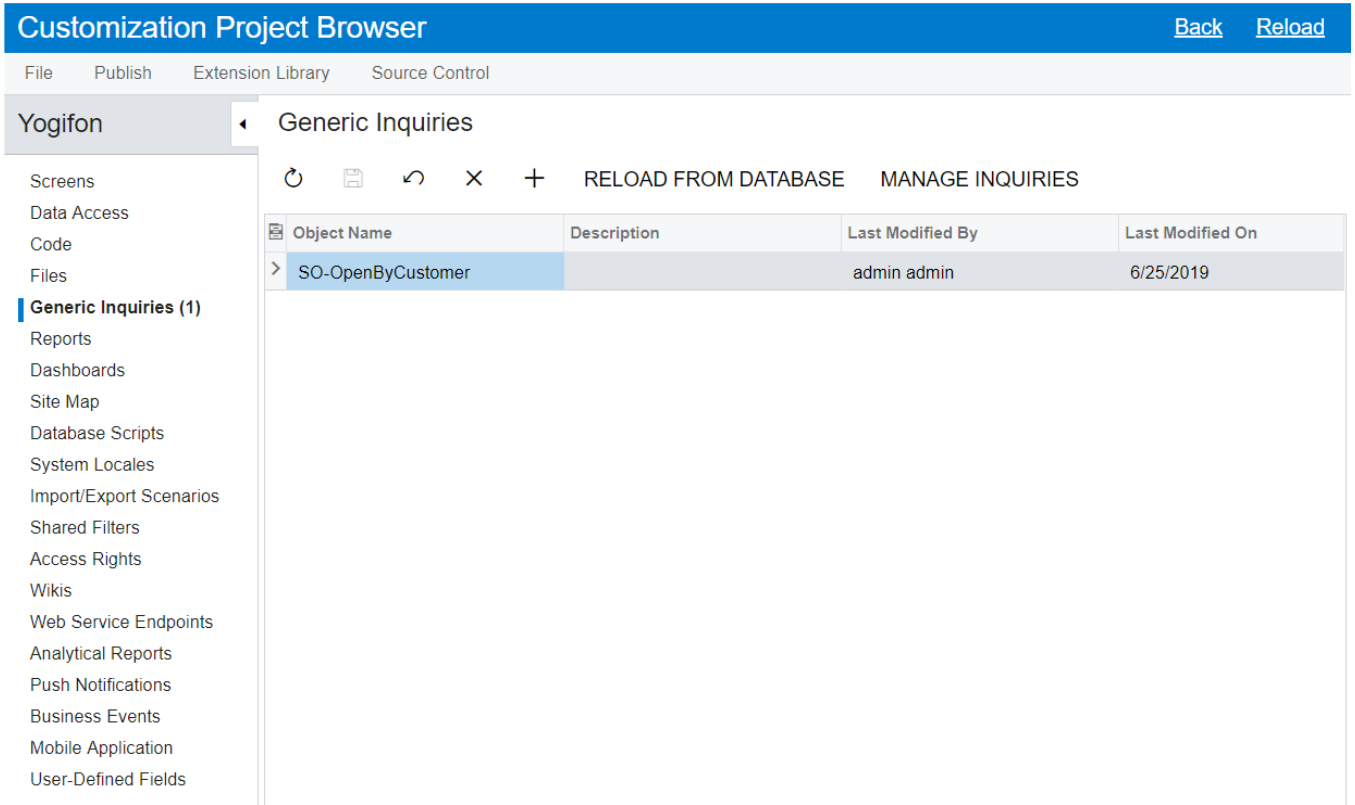
Lesson 1.1: Create a Customization Project

Learning Objectives: In this lesson, you will learn how to create a customization project that you will use in future lessons of this course.

Customization Projects

Part 2: Customizing Acumatica ERP for Business Process Support

The Customization Project Editor



Lesson 2.1: Add a Generic Inquiry to the Customization Project

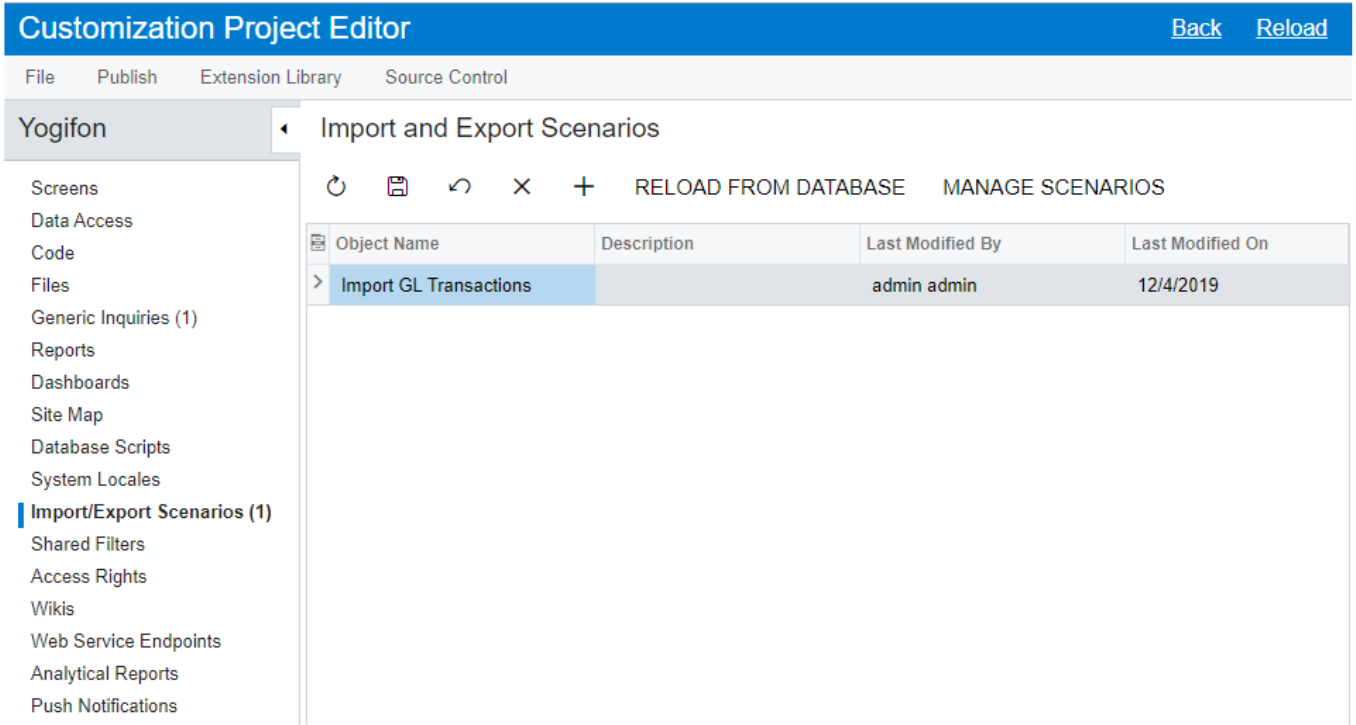
Learning Objectives: As you complete this lesson, you will learn how to add a generic inquiry to a customization project.

Self-Guided Exercise

Add an Import Scenario to the Customization Project:

In this exercise, you will learn how to add the Import GL Transactions scenario to the customization project by using the Import and Export Scenarios page of the Customization Project Editor.

The Import and Export Scenarios page



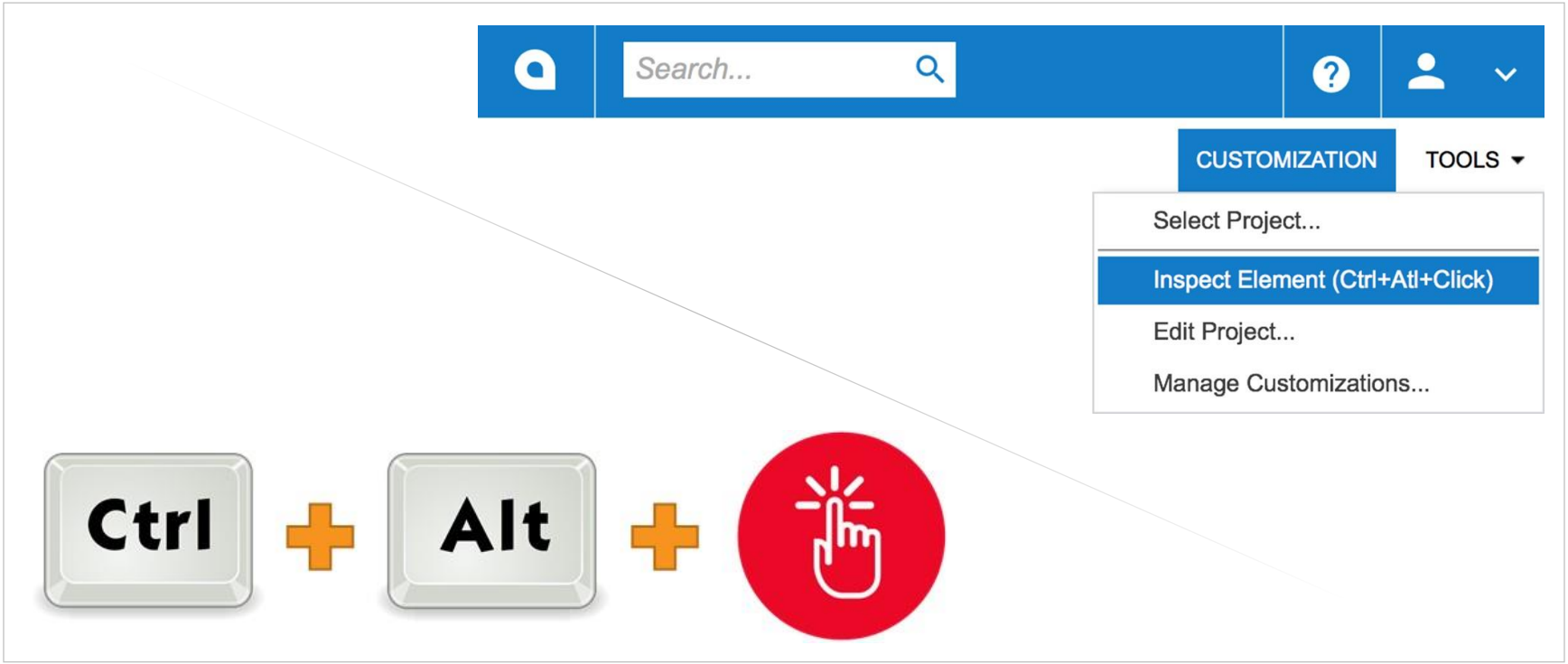
Lesson 2.2: Update a Customization Item

Learning Objectives: As you complete this lesson, you will learn how to update a generic inquiry item in a customization project.

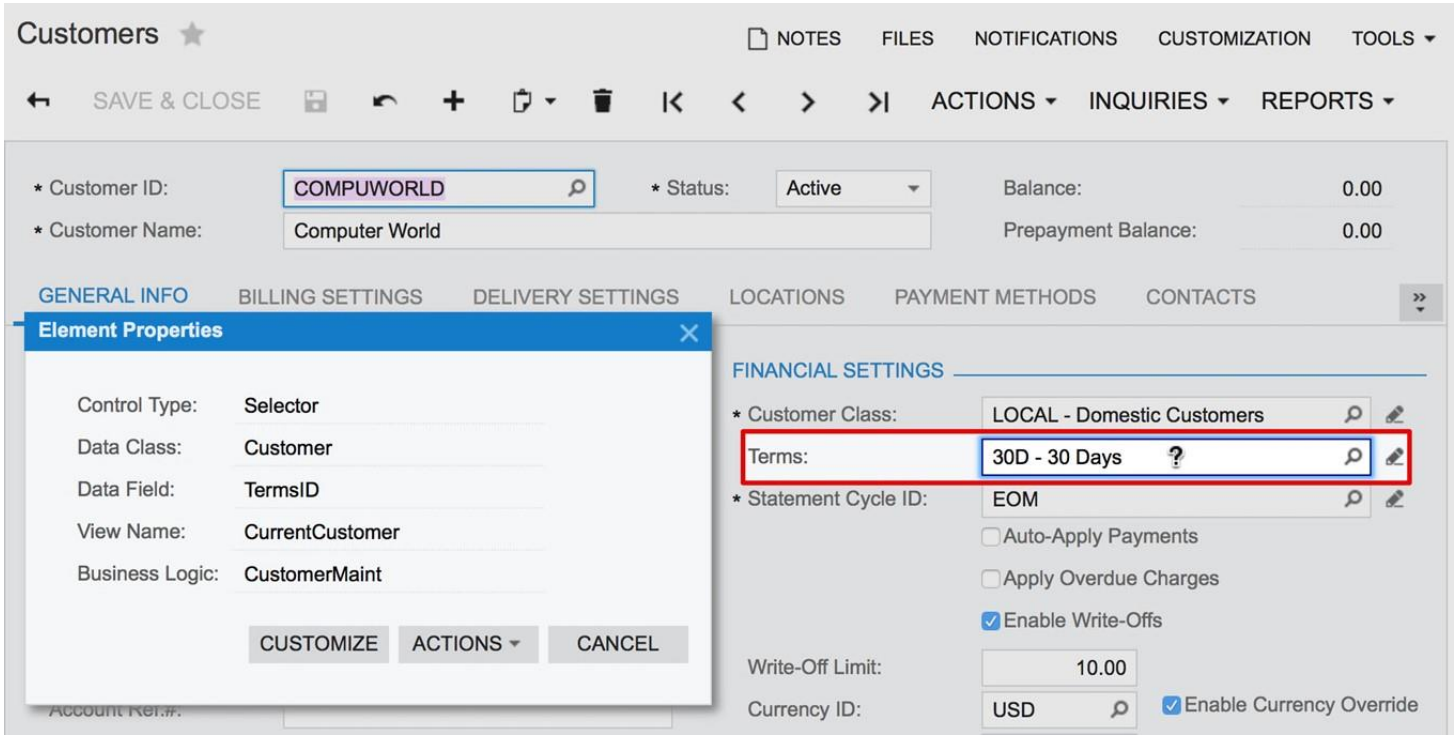
Customization Projects

Part 3: Customizing Screens

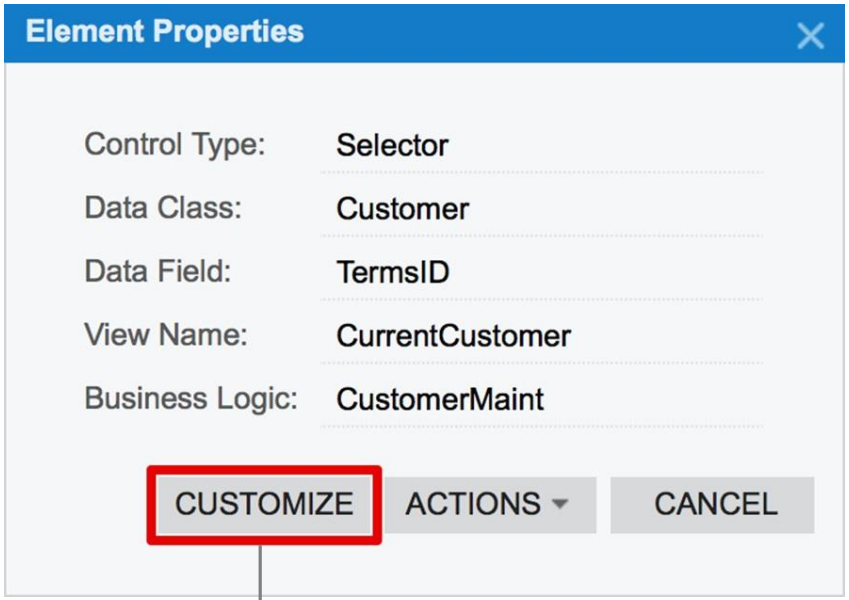
Element Inspector

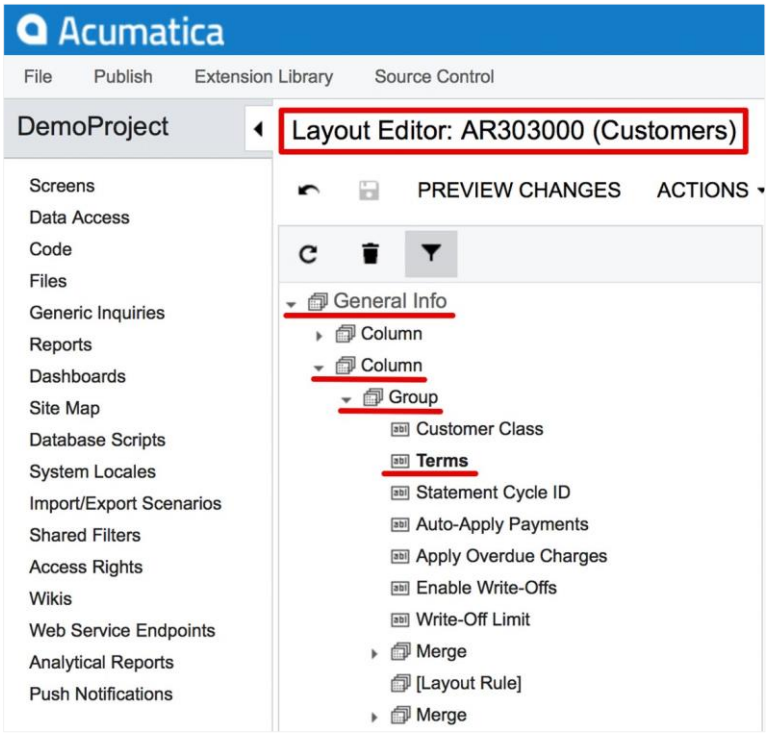


Element Inspector

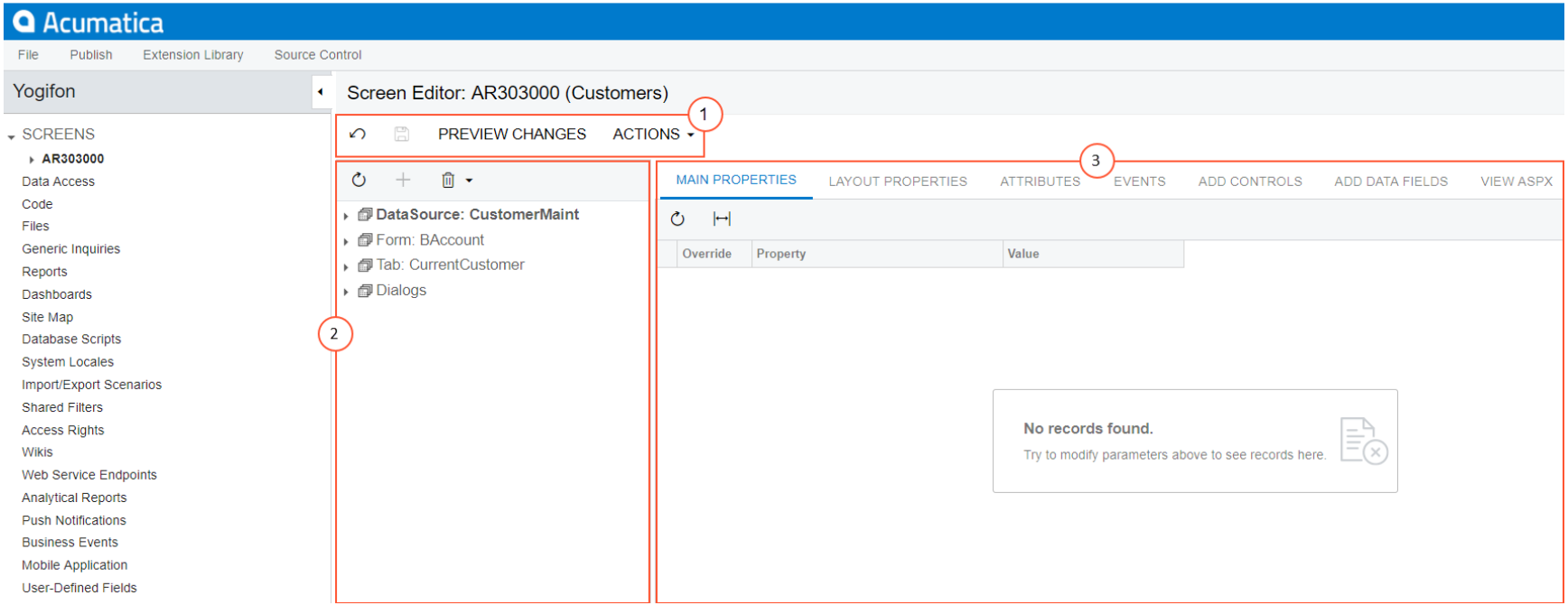


Element Inspector to Screen Editor





Screen Editor

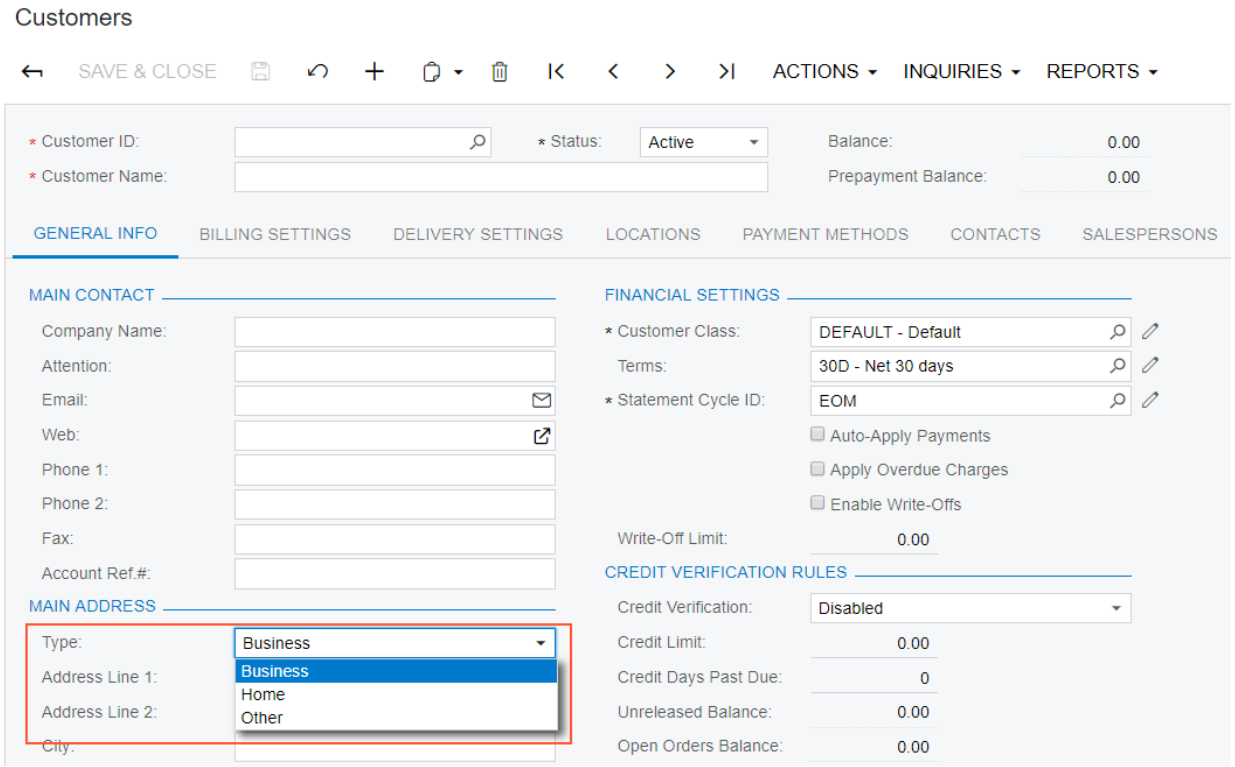


Lesson 3.1: Add a Box to a Form

Learning Objectives: As you complete this lesson, you will learn how to do the following:

- Use the Element Inspector to open a form in the Screen Editor
- Add a field to a form
- Configure the added field's properties in the Screen Editor
- Publish the customization project
- Test the added field

The Address Type box on the Customers form

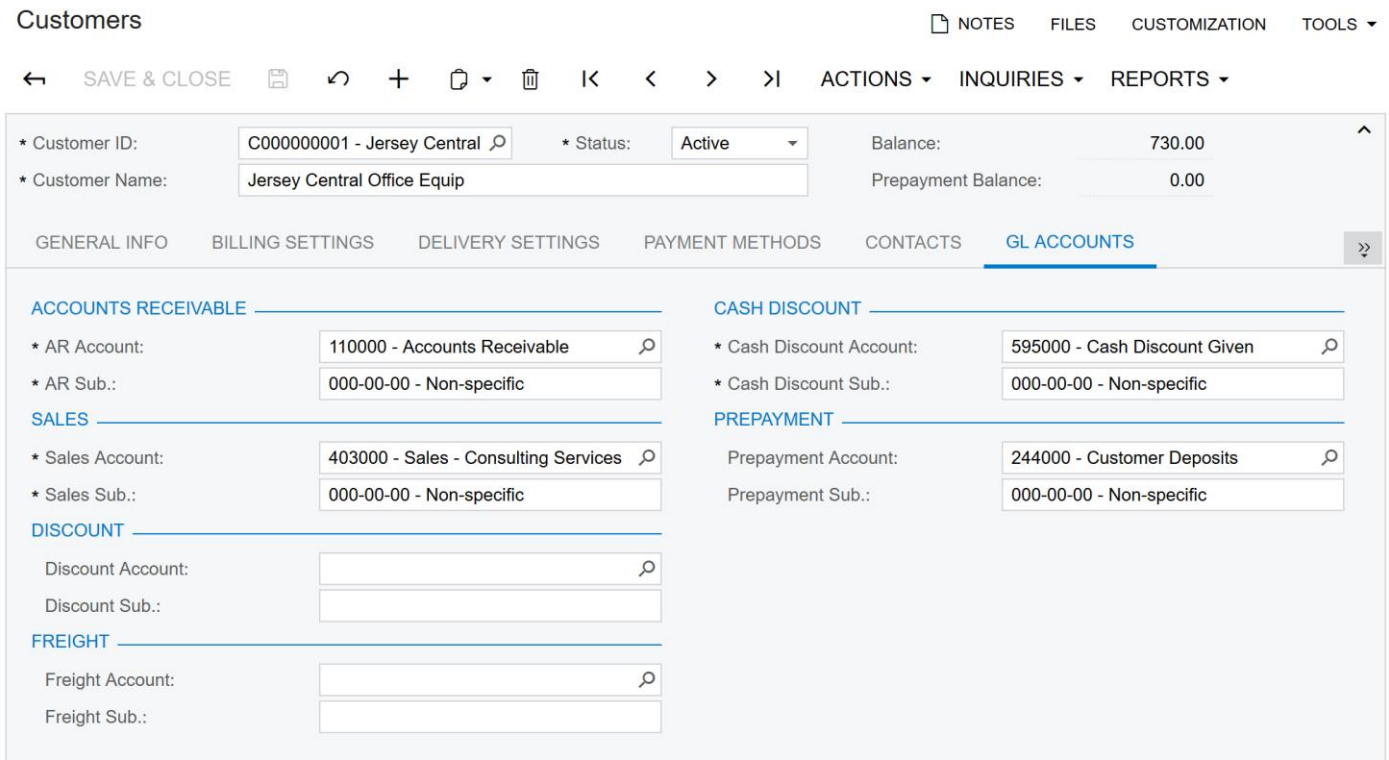


Lesson 3.2: Configure the Layout of a Form

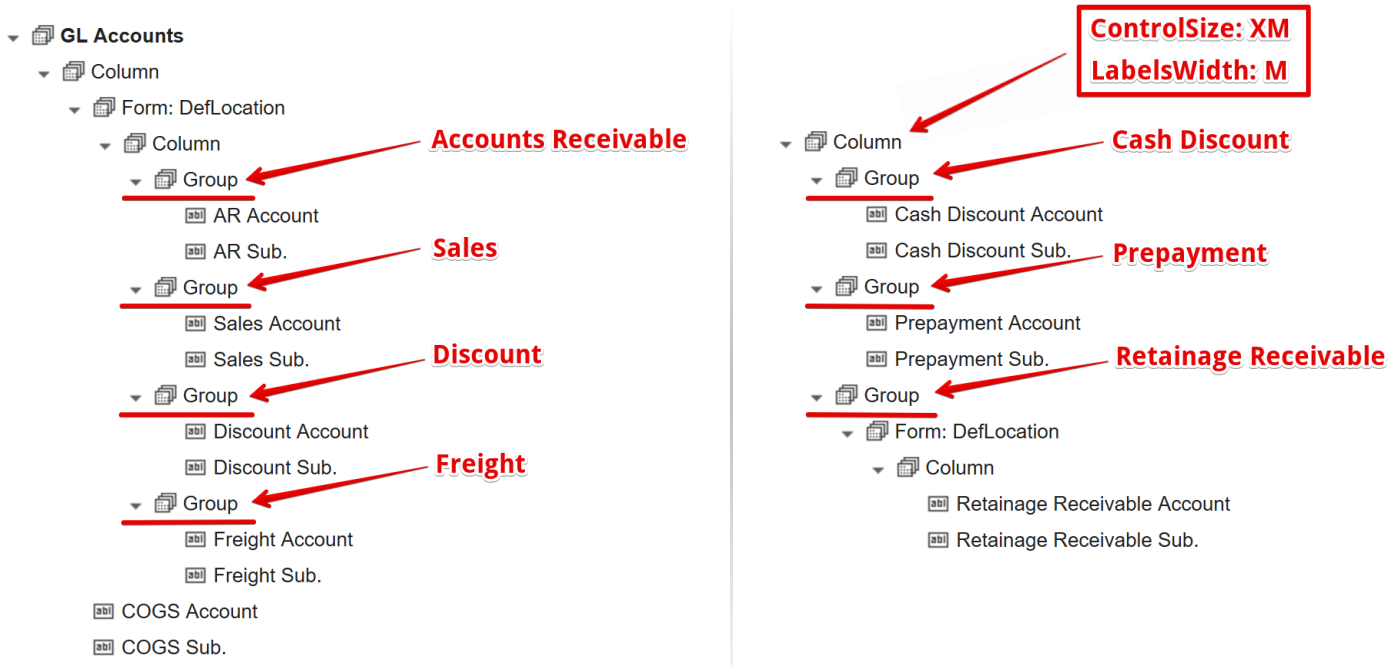
Learning Objectives: As you complete this lesson, you will learn how to do the following:

- Learn about layout rules and their types
- Organize the elements on a form by using layout rules

The needed layout of the GL Accounts tab



The needed layout of the GL Accounts tab

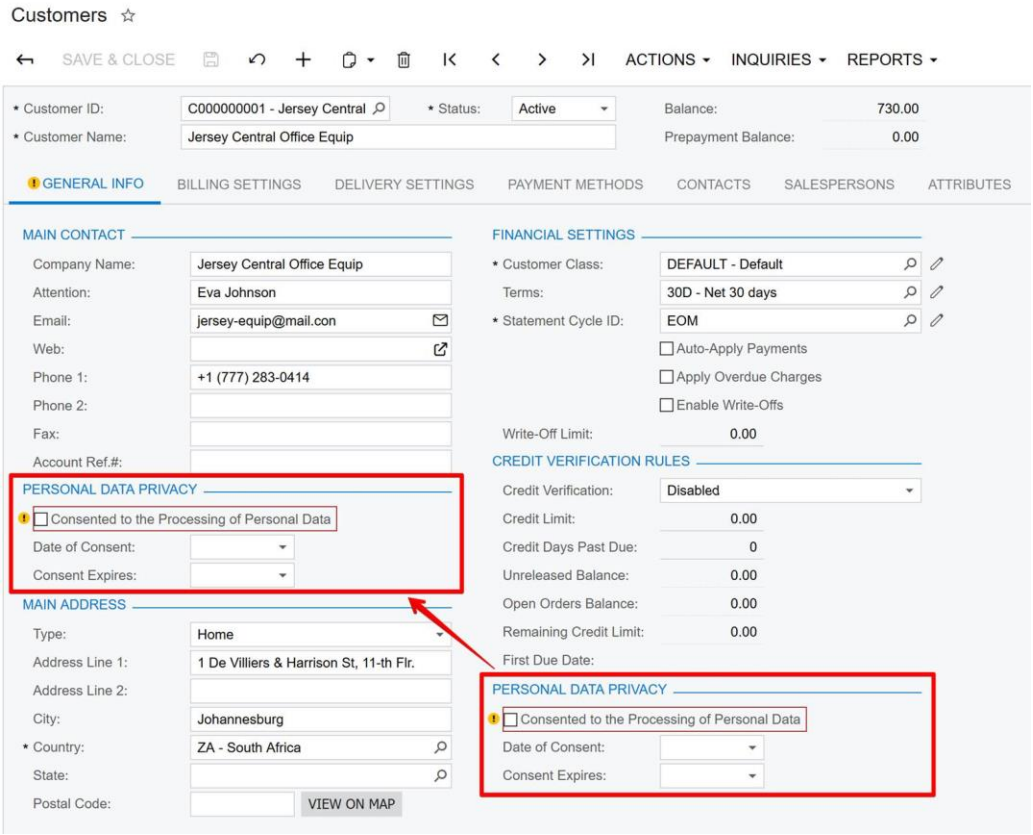


Self-Guided Exercise

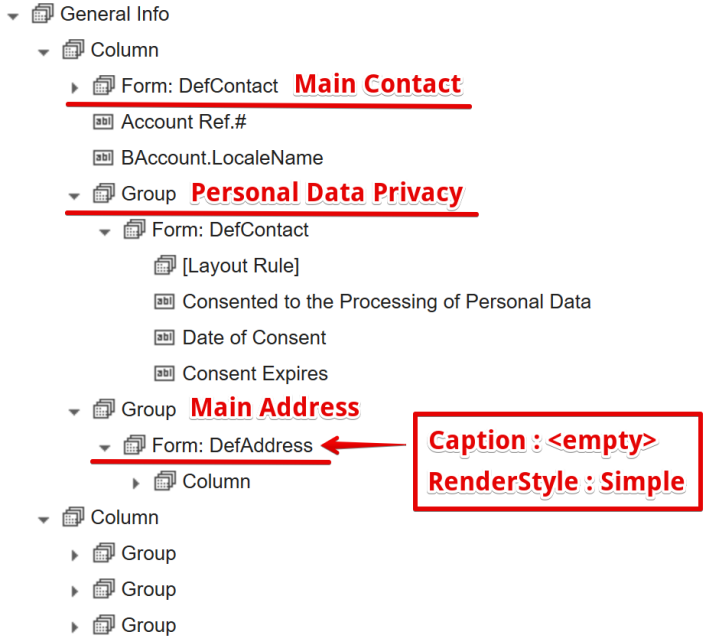
Moving the Personal Data Privacy group to the left column in the General Info tab:

In this exercise, you will place the Personal Data Privacy group in the left column of the General Info tab on the Customers screen using the Screen Editor.

The needed layout of the General Info tab



The needed layout of the General Info tab

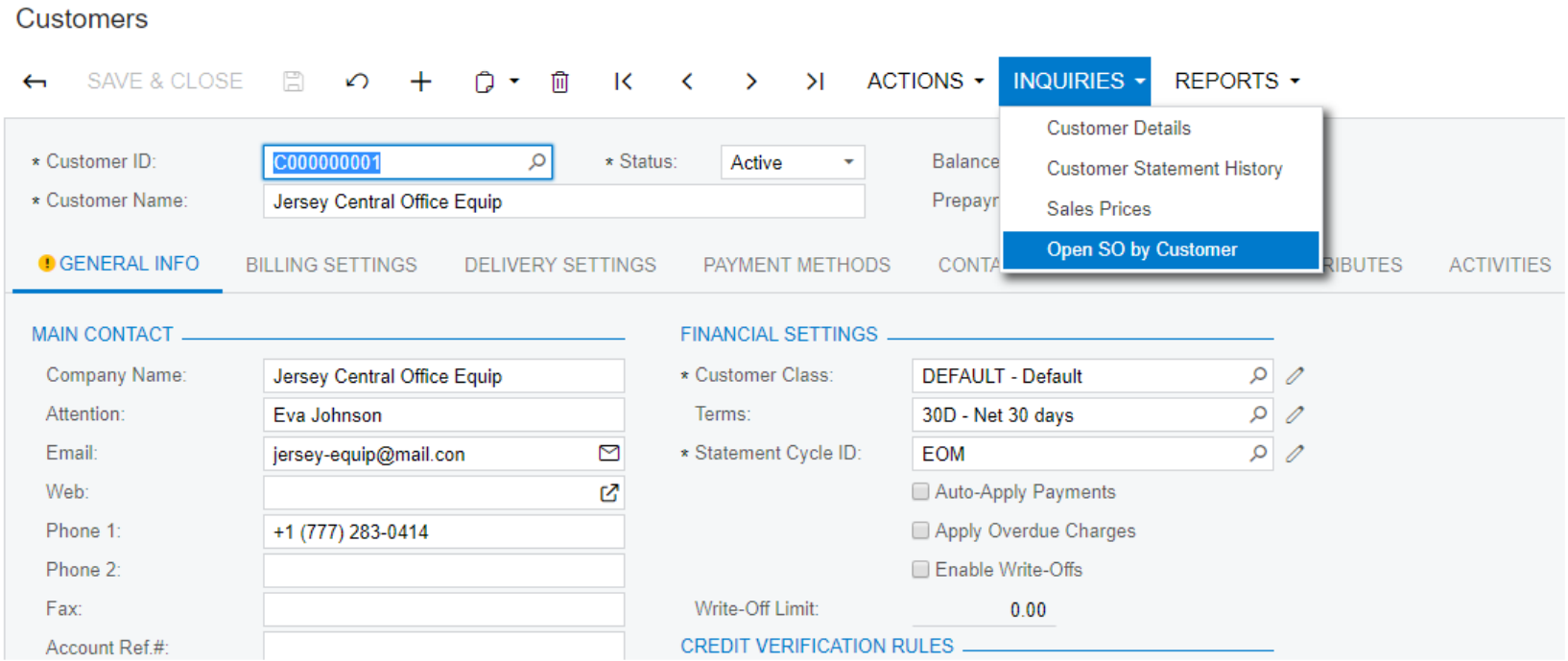


Lesson 3.3: Add an Action to a Form

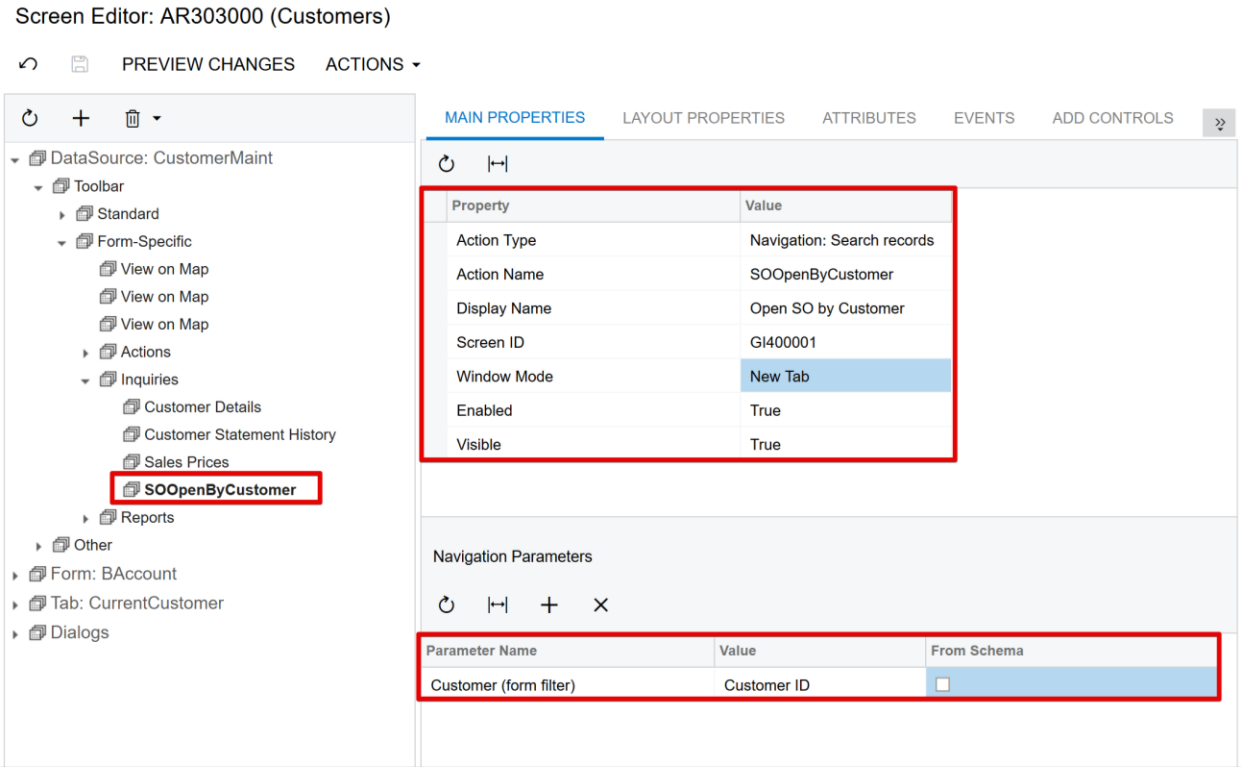
Learning Objectives: As you complete this lesson, you will learn how to do the following:

- Learn how to add an action to a form toolbar
- Test the added action

The Open SO by Customer action



The Open SO by Customer action



Lesson 3.4: Configure Conditions

Learning Objectives: As you complete this lesson, you will learn how to do the following:

- Configure different kinds of conditions on the Conditions page
- Specify conditions for properties of a UI element

Example 3.4.1

Make the View Invoice Action Enabled Only if the Status Field Value Is Released:

On the Cases (CR306000) form, in the **Inquiries** menu of the form toolbar, you can find the **View Invoice** action. An invoice is generated only when a case is released. So it is logical to make the **View Invoice** action enabled if the case status is Released.

In this example, you will learn how to configure this condition for the **View Invoice** action.

Example 3.4.2

Make the Owner Field Required if the Priority or Severity Is Set to High:

If the case priority is high or the case severity is high, it is important that the case have an owner assigned, so the case can be expedited.

In this example, you will learn how to configure this condition for the **Owner** box.

Self-Guided Exercise

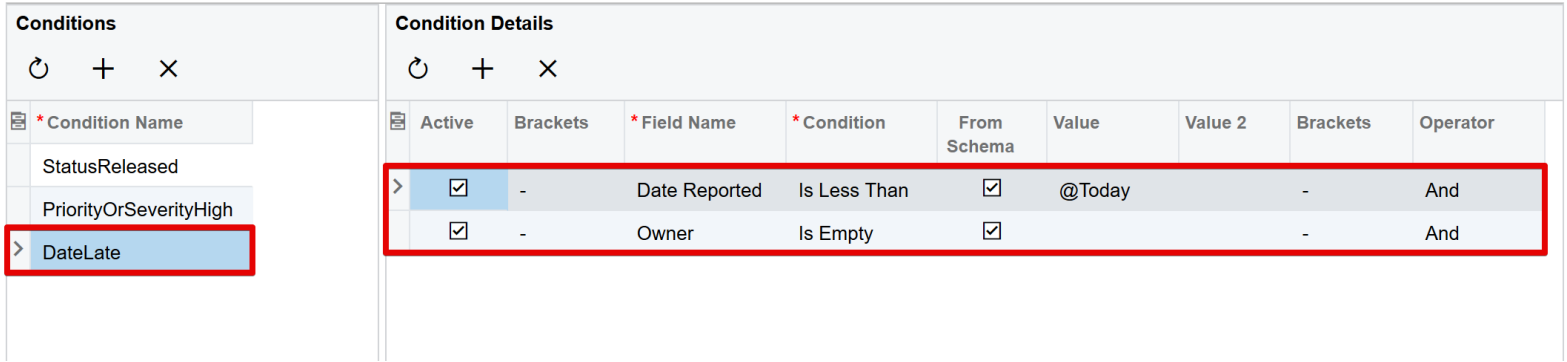
Make the Owner Required If the Case Was Reported Earlier than Yesterday:

Usually, an owner should be assigned to a case as soon as possible. In this self-guided exercise, you will make the owner field required for the case if it was reported earlier than today.

To do this, you should configure a condition for the Owner box of the Cases (CR306000) form. The condition should use the value of the Owner box and a comparison for the Date Reported box value.

The resulting condition

Conditions: CR306000 (Cases)

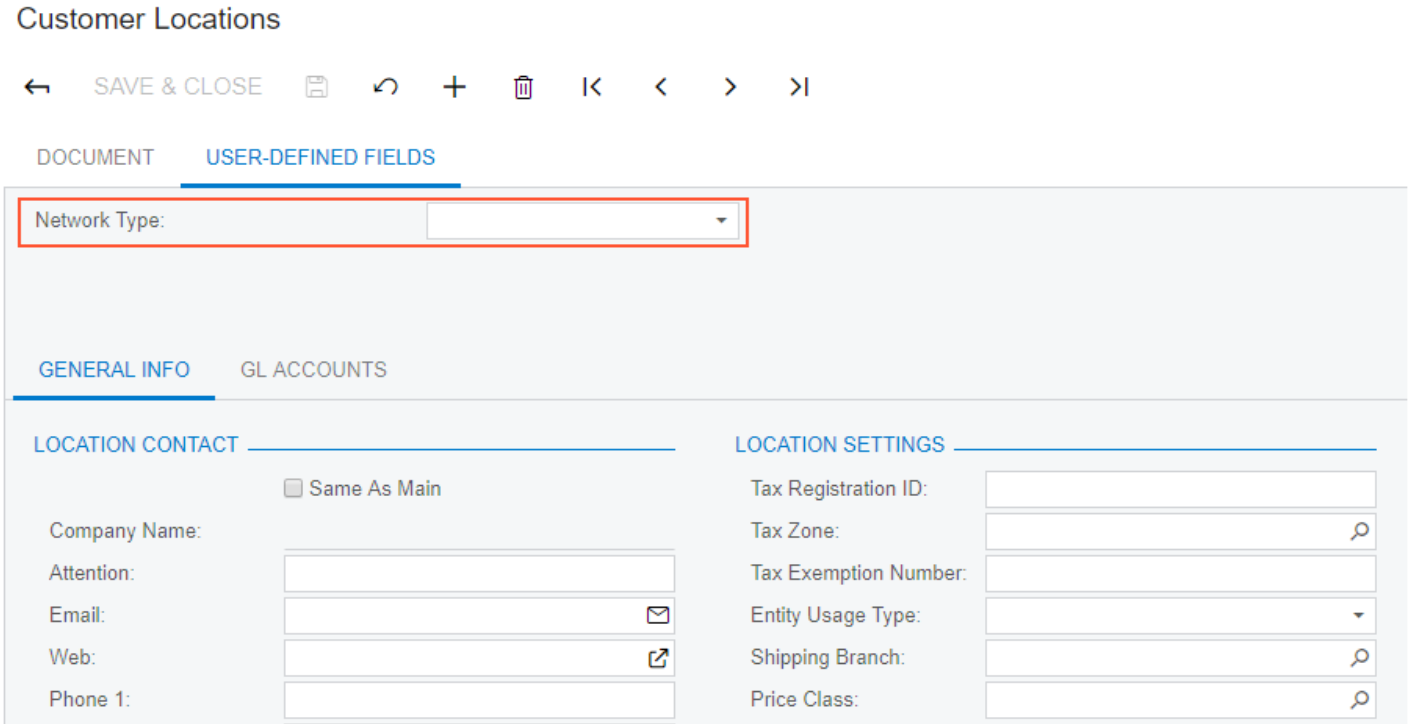


Lesson 3.5: Add User-Defined Fields

Learning Objectives: As you complete this lesson, you will learn how to do the following:

- Define an attribute for a user-defined field
- Add the user-defined field to a form
- Add the user-defined field to the customization project

The Network Type box



Customization Projects

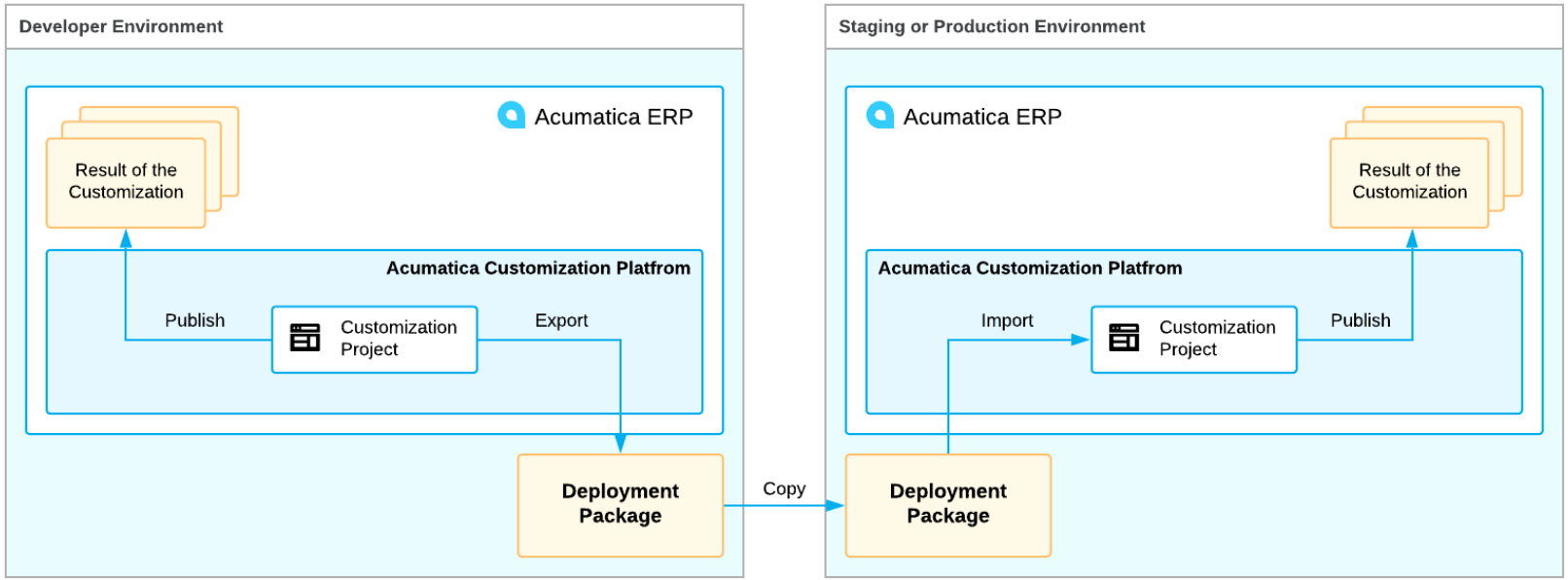
Part 4: Managing Customization Projects

Lesson 4.1: Deploy the Customization Project to a Staging Environment

Learning Objectives: As you complete this lesson, you will learn how to do the following:

- Create the deployment package of the Yogifon customization project
- Apply the Yogifon customization project to the staging environment

Deployment of the customization to a target environment



Lesson 4.2: Publish Multiple Customization Projects

Learning Objectives: As a result of completing this lesson, you will learn how to do the following:

- Create a new customization project
- Publish two customization projects simultaneously

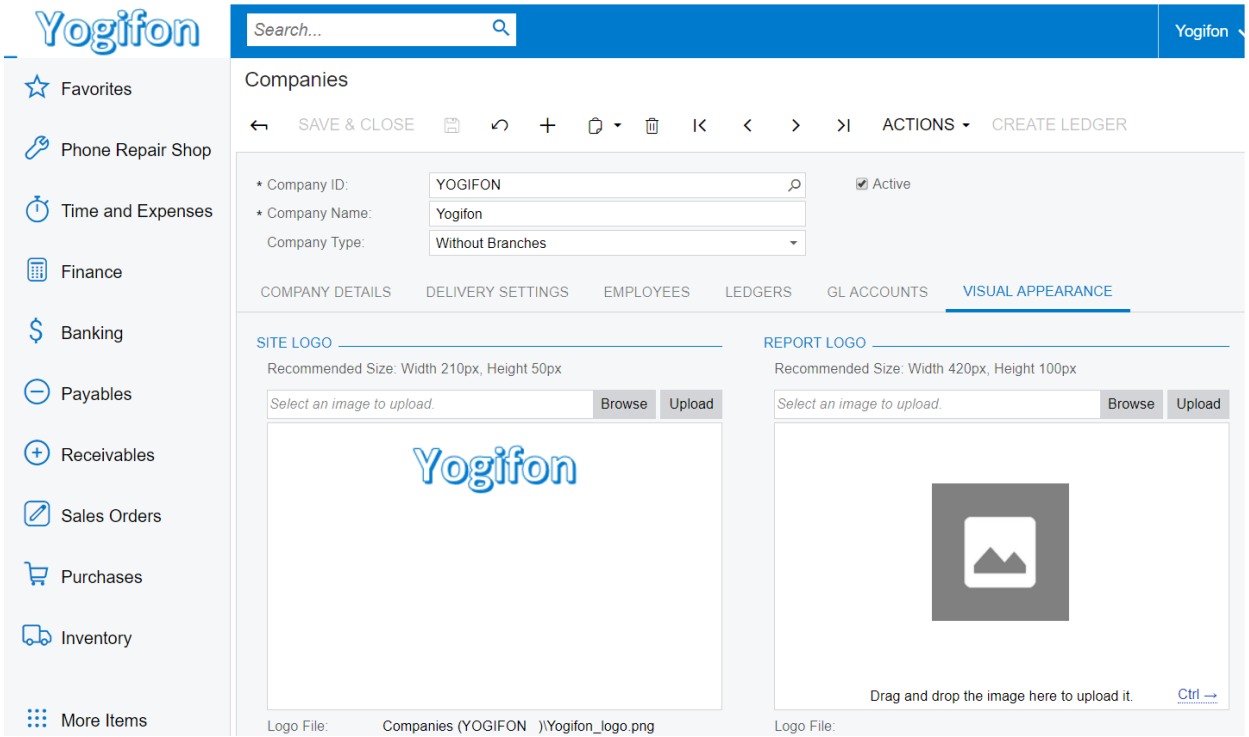
Customization Projects

Part 5: Customizing the Appearance of the Acumatica ERP Instance

Lesson 5.1: Change the Company Logo

Learning Objectives: As a result of completing this lesson, you will learn how to change the logo of the Yogifon company in Acumatica ERP.

The new logo on the screen



Lesson 5.2: Change Images on the Welcome Page

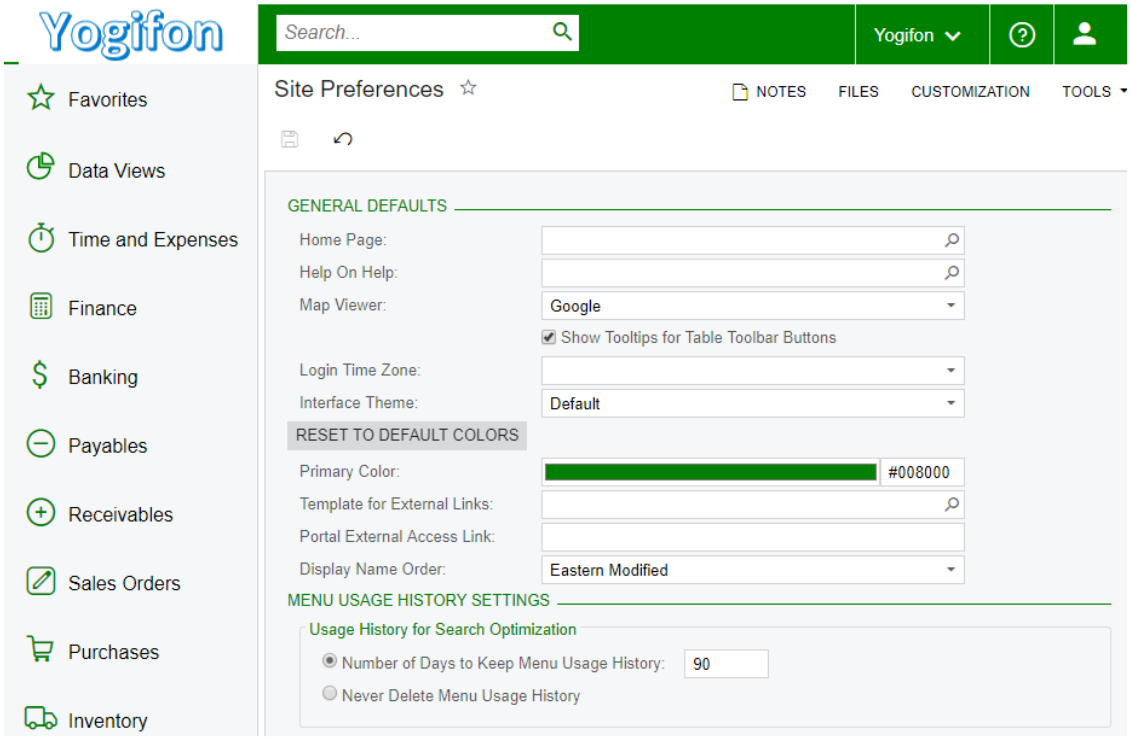
Learning Objectives: As a result of completing this lesson, you will learn how to replace the default set of images with the set that has been provided for this training course.

Lesson 5.3: Customize the Color Theme

Learning Objectives: In this lesson, you will learn how to do the following:

- Change the primary color of the default theme on the Site Preferences (SM200505) form
- Create a new theme
- Explore and configure CSS files that define the created theme

The Site Preferences form after the primary color change

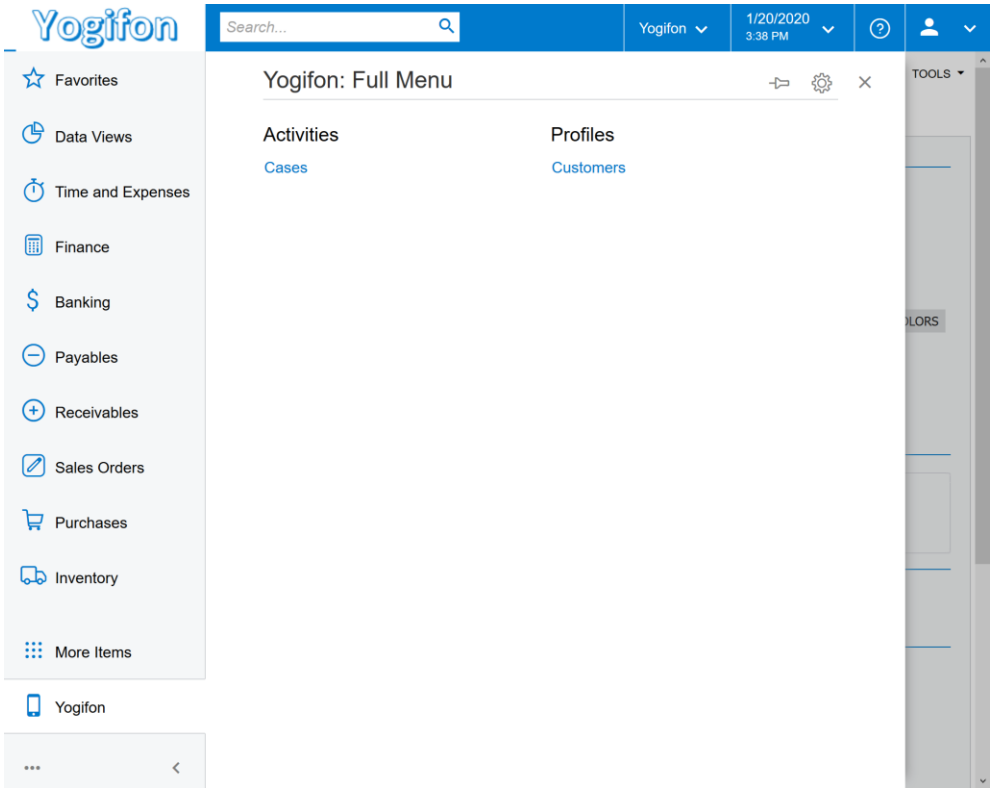


Lesson 5.4: Configure a Workspace

Learning Objectives: In this lesson, you will learn how to do the following:

- Create the **Yogifon** workspace
- Add links to the Customers (AR303000) and Cases (CR306000) forms to the **Yogifon** workspace

The Yogifon workspace



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Thank You

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