

# S140 Customization Projects

Ruslan Devyatko

Services | Acumatica

# Timing and Agenda

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**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

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**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

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Initial Configuration:

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

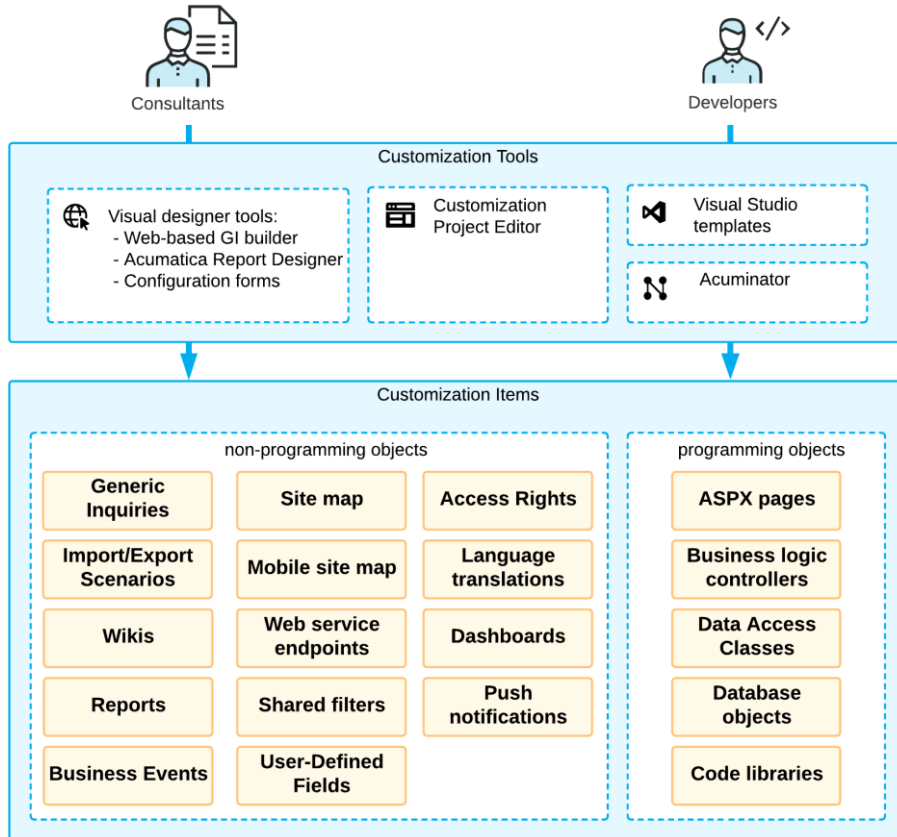
## Customization Projects

### Company Story and Customization Description

# Customization Projects

## Part 1: Preparing for Customization

# The Customization of Acumatica ERP



# Lesson 1.1: Create a Customization Project

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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

## Customization Project Browser






[Back](#)[Reload](#)

FilePublishExtension LibrarySource Control


Yogifon

ScreensData AccessCodeFilesGeneric Inquiries (1)ReportsDashboardsSite MapDatabase ScriptsSystem LocalesImport/Export ScenariosShared FiltersAccess RightsWikisWeb Service EndpointsAnalytical ReportsPush NotificationsBusiness EventsMobile ApplicationUser-Defined Fields

Generic Inquiries



RELOAD FROM DATABASEMANAGE INQUIRIES

 Object Name	Description	Last Modified By	Last Modified On
> SO-OpenByCustomer		admin admin	6/25/2019

## Lesson 2.1: Add a Generic Inquiry to the Customization Project

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

# Self-Guided Exercise

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## 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

Customization Project Editor






[Back](#) [Reload](#)


File Publish Extension Library Source Control

Yogifon

ScreensData AccessCodeFilesGeneric Inquiries (1)ReportsDashboardsSite MapDatabase ScriptsSystem Locales**Import/Export Scenarios (1)**Shared FiltersAccess RightsWikisWeb Service EndpointsAnalytical ReportsPush Notifications

Import and Export Scenarios

     RELOAD FROM DATABASEMANAGE SCENARIOS

 Object Name	Description	Last Modified By	Last Modified On
> Import GL Transactions		admin admin	12/4/2019

## Lesson 2.2: Update a Customization Item

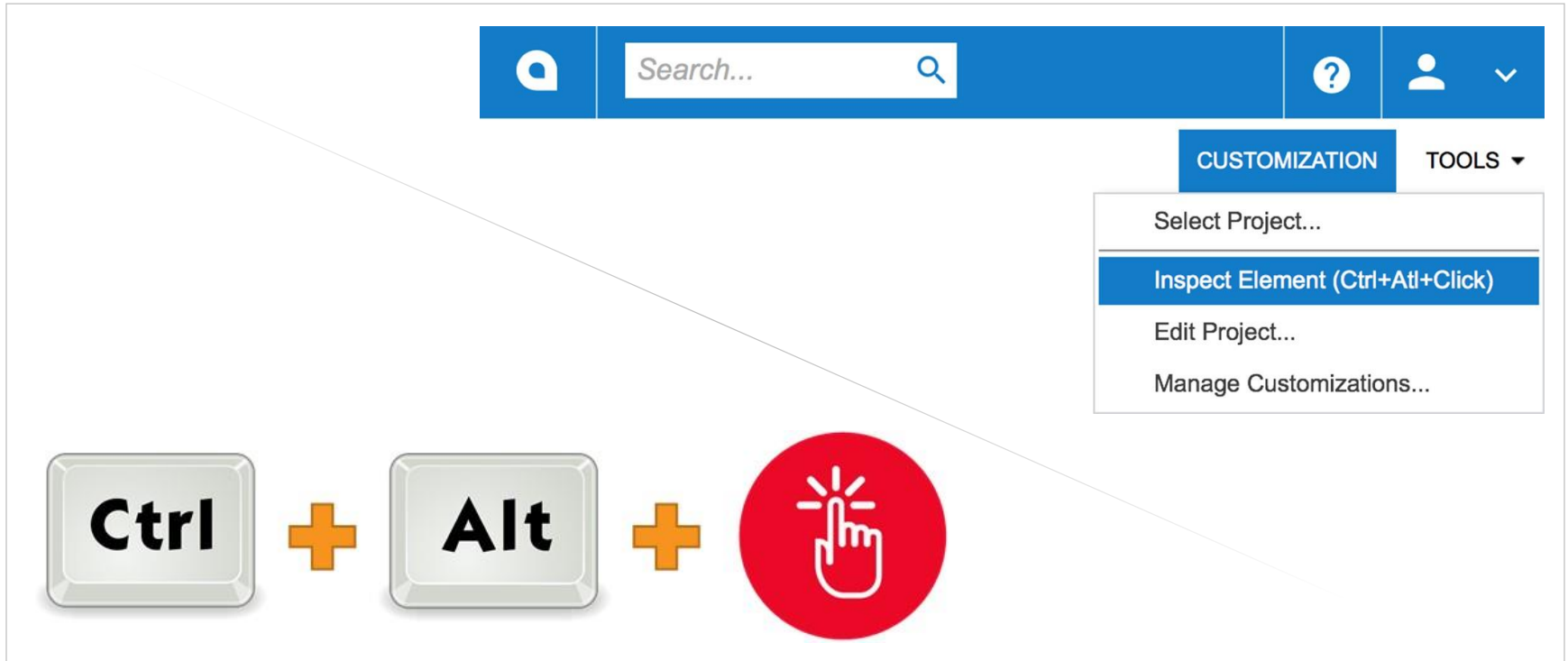
---

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

Customers ★

NOTES FILES NOTIFICATIONS CUSTOMIZATION TOOLS ▾

SAVE & CLOSE [Icons] ACTIONS ▾ INQUIRIES ▾ REPORTS ▾

\* Customer ID:  \* Status:  Balance: 0.00

\* Customer Name:  Prepayment Balance: 0.00

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS LOCATIONS PAYMENT METHODS CONTACTS >>

**Element Properties** ✕

Control Type:

Data Class:

Data Field:

View Name:

Business Logic:

CUSTOMIZE ACTIONS ▾ CANCEL

**FINANCIAL SETTINGS**

\* Customer Class:

Terms:  ?

\* Statement Cycle ID:

☐ Auto-Apply Payments

☐ Apply Overdue Charges

☒ Enable Write-Offs

Write-Off Limit:

Currency ID:  ☒ Enable Currency Override

# Element Inspector to Screen Editor

**Element Properties** ✕

Control Type:

Selector

Data Class:

Customer

Data Field:

TermsID

View Name:

CurrentCustomer

Business Logic:

CustomerMaint

CUSTOMIZE

ACTIONS ▾

CANCEL

**Acumatica**

File Publish Extension Library Source Control

DemoProject ▾

Screens  
Data Access  
Code  
Files  
Generic Inquiries  
Reports  
Dashboards  
Site Map  
Database Scripts  
System Locales  
Import/Export Scenarios  
Shared Filters  
Access Rights  
Wikis  
Web Service Endpoints  
Analytical Reports  
Push Notifications

Layout Editor: AR303000 (Customers)

PREVIEW CHANGES ACTIONS ▾

General Info

Column

Column

Group

Customer Class

Terms

Statement Cycle ID

Auto-Apply Payments

Apply Overdue Charges

Enable Write-Offs

Write-Off Limit

Merge

[Layout Rule]

Merge

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The Cloud ERP

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# Screen Editor

**Acumatica**

File Publish Extension Library Source Control

Yogifon

Screen Editor: AR303000 (Customers)

1

PREVIEW CHANGES ACTIONS

2

SCREENS

- AR303000
  - Data Access
  - Code
  - Files
  - Generic Inquiries
  - Reports
  - Dashboards
  - Site Map
  - Database Scripts
  - System Locales
  - Import/Export Scenarios
  - Shared Filters
  - Access Rights
  - Wikis
  - Web Service Endpoints
  - Analytical Reports
  - Push Notifications
  - Business Events
  - Mobile Application
  - User-Defined Fields

3

MAIN PROPERTIES LAYOUT PROPERTIES ATTRIBUTES EVENTS ADD CONTROLS ADD DATA FIELDS VIEW ASPX

Override	Property	Value
----------	----------	-------

No records found.

Try to modify parameters above to see records here.

## Lesson 3.1: Add a Box to a Form

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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



## Customers

← SAVE & CLOSE   +   |< < > >| ACTIONS ▾ INQUIRIES ▾ REPORTS ▾

\* Customer ID:  \* Status: **Active** Balance: 0.00  
\* Customer Name:  Prepayment Balance: 0.00

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS







### MAIN CONTACT

Company Name:   
Attention:   
Email:    
Web:    
Phone 1:   
Phone 2:   
Fax:   
Account Ref.#:

### MAIN ADDRESS

Type: **Business**  
Address Line 1:   
Address Line 2:   
City:

### FINANCIAL SETTINGS

\* Customer Class: **DEFAULT - Default**    
Terms: **30D - Net 30 days**    
\* Statement Cycle ID: **EOM**    
☐ Auto-Apply Payments  
☐ Apply Overdue Charges  
☐ Enable Write-Offs  
Write-Off Limit: 0.00

### CREDIT VERIFICATION RULES

Credit Verification: **Disabled** ▾  
Credit Limit: 0.00  
Credit Days Past Due: 0  
Unreleased Balance: 0.00  
Open Orders Balance: 0.00

## Lesson 3.2: Configure the Layout of a Form

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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

## Customers

NOTES FILES CUSTOMIZATION TOOLS ▾

← SAVE & CLOSE   +   K < > >I ACTIONS ▾ INQUIRIES ▾ REPORTS ▾

\* Customer ID: C000000001 - Jersey Central 🔍 \* Status: Active ▾ Balance: 730.00  
\* Customer Name: Jersey Central Office Equip Prepayment Balance: 0.00

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS PAYMENT METHODS CONTACTS GL ACCOUNTS >>

### ACCOUNTS RECEIVABLE

\* AR Account: 110000 - Accounts Receivable 🔍  
\* AR Sub.: 000-00-00 - Non-specific

### SALES

\* Sales Account: 403000 - Sales - Consulting Services 🔍  
\* Sales Sub.: 000-00-00 - Non-specific

### DISCOUNT

Discount Account: 🔍  
Discount Sub.:

### FREIGHT

Freight Account: 🔍  
Freight Sub.:

### CASH DISCOUNT

\* Cash Discount Account: 595000 - Cash Discount Given 🔍  
\* Cash Discount Sub.: 000-00-00 - Non-specific

### PREPAYMENT

Prepayment Account: 244000 - Customer Deposits 🔍  
Prepayment Sub.: 000-00-00 - Non-specific

# The needed layout of the GL Accounts tab

## GL Accounts

### Column

#### Form: DefLocation

#### Column

##### Group

AR Account

AR Sub.

##### Group

Sales Account

Sales Sub.

##### Group

Discount Account

Discount Sub.

##### Group

Freight Account

Freight Sub.

COGS Account

COGS Sub.

**Accounts Receivable**

**Sales**

**Discount**

**Freight**

**ControlSize: XM**

**LabelsWidth: M**

#### Column

##### Group

Cash Discount Account

Cash Discount Sub.

##### Group

Prepayment Account

Prepayment Sub.

##### Group

#### Form: DefLocation

#### Column

Retainage Receivable Account

Retainage Receivable Sub.

**Cash Discount**

**Prepayment**

**Retainage Receivable**



## Self-Guided Exercise

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### **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

Customers ☆

← SAVE & CLOSE 📄 ↶ + 🗑️ ✂️ < > >| ACTIONS ▾ INQUIRIES ▾ REPORTS ▾

* Customer ID:	C000000001 - Jersey Central 🗑️	* Status:	Active ▾	Balance:	730.00
* Customer Name:	Jersey Central Office Equip	Prepayment Balance:	0.00		

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES

### MAIN CONTACT

Company Name: Jersey Central Office Equip

Attention: Eva Johnson

Email: jersey-equip@mail.com ✉️

Web: 🌐

Phone 1: +1 (777) 283-0414

Phone 2:

Fax:

Account Ref. #:

### FINANCIAL SETTINGS

\* Customer Class: DEFAULT - Default 🗑️ ✎

Terms: 30D - Net 30 days 🗑️ ✎

\* Statement Cycle ID: EOM 🗑️ ✎

☐ Auto-Apply Payments

☐ Apply Overdue Charges

☐ Enable Write-Offs

Write-Off Limit: 0.00

### PERSONAL DATA PRIVACY

⚠️ ☐ Consented to the Processing of Personal Data

Date of Consent: ▾

Consent Expires: ▾

### MAIN ADDRESS

Type: Home ▾

Address Line 1: 1 De Villiers & Harrison St, 11-th Flr.

Address Line 2:

City: Johannesburg

\* Country: ZA - South Africa 🗑️

State: 🗑️

Postal Code:  VIEW ON MAP

### CREDIT VERIFICATION RULES

Credit Verification: Disabled ▾

Credit Limit: 0.00

Credit Days Past Due: 0

Unreleased Balance: 0.00

Open Orders Balance: 0.00

Remaining Credit Limit: 0.00

First Due Date:

### PERSONAL DATA PRIVACY

⚠️ ☐ Consented to the Processing of Personal Data

Date of Consent: ▾

Consent Expires: ▾

# The needed layout of the General Info tab

- ▼ General Info
  - ▼ Column
    - ▶ Form: DefContact **Main Contact**
      - Account Ref.#
      - BAccount.LocaleName
    - ▼ Group **Personal Data Privacy**
      - ▼ Form: DefContact
        - [Layout Rule]
        - Consented to the Processing of Personal Data
        - Date of Consent
        - Consent Expires
    - ▼ Group **Main Address**
      - ▼ Form: DefAddress ← **Caption : <empty>**  
**RenderStyle : Simple**
        - Column
  - ▼ Column
    - ▶ Group
    - ▶ Group
    - ▶ Group

## Lesson 3.3: Add an Action to a Form





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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

## Customers

← SAVE & CLOSE   +   |< < > >| ACTIONS ▾ INQUIRIES ▾ REPORTS ▾

\* Customer ID:  \* Status:  Balance Prepay


\* Customer Name:


! GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS PAYMENT METHODS CONTACT INFORMATION CONTRIBUTES ACTIVITIES

**MAIN CONTACT**

Company Name:

Attention:

Email:  

Web:  



Phone 1:



Phone 2:



Fax:

Account Ref.:

**FINANCIAL SETTINGS**

\* Customer Class:   

Terms:   

\* Statement Cycle ID:   

☐ Auto-Apply Payments

☐ Apply Overdue Charges

☐ Enable Write-Offs

Write-Off Limit:

**CREDIT VERIFICATION RULES**

# The Open SO by Customer action

Screen Editor: AR303000 (Customers)

PREVIEW CHANGES ACTIONS

⌂ + -

Data Source: CustomerMaint

Toolbar

Standard

Form-Specific

View on Map

View on Map

View on Map

Actions

Inquiries

Customer Details

Customer Statement History

Sales Prices

**SOOpenByCustomer**

Reports

Other

Form: BAccount

Tab: CurrentCustomer

Dialogs

MAIN PROPERTIES LAYOUT PROPERTIES ATTRIBUTES EVENTS ADD CONTROLS


⌂ |

Property	Value
Action Type	Navigation: Search records
Action Name	SOOpenByCustomer
Display Name	Open SO by Customer
Screen ID	GI400001
Window Mode	New Tab
Enabled	True
Visible	True

Navigation Parameters

⌂ | + ×

Parameter Name	Value	From Schema
Customer (form filter)	Customer ID	<input type="checkbox"/>

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## Lesson 3.4: Configure Conditions

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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

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### 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)



Conditions		Condition Details									
↻ + ×		↻ + ×									
* Condition Name		Active	Brackets	* Field Name	* Condition	From Schema	Value	Value 2	Brackets	Operator	
StatusReleased		>	<input checked="" type="checkbox"/>	-	Date Reported	Is Less Than	<input checked="" type="checkbox"/>	@Today	-	And	
PriorityOrSeverityHigh			<input checked="" type="checkbox"/>	-	Owner	Is Empty	<input checked="" type="checkbox"/>		-	And	
> DateLate											

## 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

## Customer Locations

← SAVE & CLOSE   +  ⌂ < > >|

DOCUMENT

USER-DEFINED FIELDS

Network Type:

GENERAL INFO

GL ACCOUNTS

### LOCATION CONTACT

☐ Same As Main

Company Name:

Attention:

Email:

Web:

Phone 1:

### LOCATION SETTINGS

Tax Registration ID:

Tax Zone:

Tax Exemption Number:

Entity Usage Type:

Shipping Branch:

Price Class:

# Customization Projects

## Part 4: Managing Customization Projects

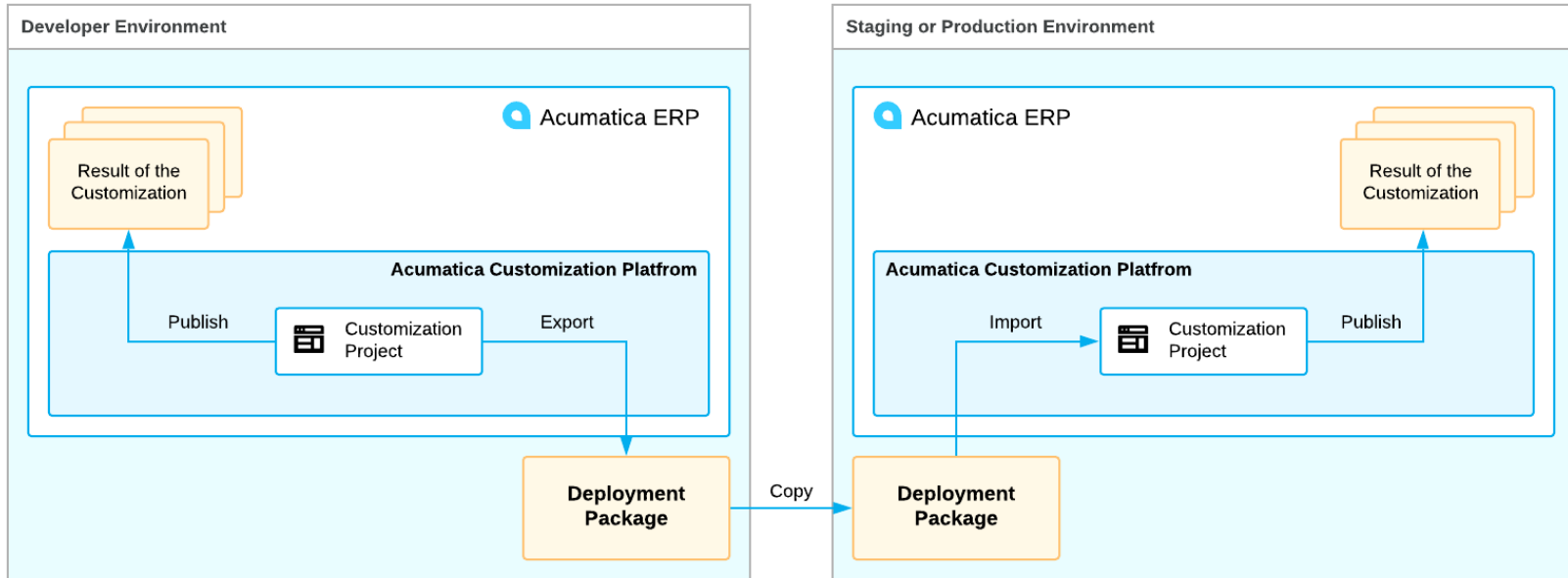
## Lesson 4.1: Deploy the Customization Project to a Staging Environment

---

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

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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

**Yogifon**

Search...

Yogifon

★ Favorites

🔧 Phone Repair Shop

🕒 Time and Expenses

📊 Finance

💰 Banking

⊖ Payables

⊕ Receivables

📝 Sales Orders

🛒 Purchases

🚚 Inventory

⋮ More Items

**Companies**

← SAVE & CLOSE ↻ + 📄 🗑️ ⏪ ⏩ ACTIONS ▾ CREATE LEDGER

• Company ID: YOGIFON ☐ Active

• Company Name: Yogifon

Company Type: Without Branches

COMPANY DETAILS DELIVERY SETTINGS EMPLOYEES LEDGERS GL ACCOUNTS VISUAL APPEARANCE

**SITE LOGO**

Recommended Size: Width 210px, Height 50px

Select an image to upload. Browse Upload

**REPORT LOGO**

Recommended Size: Width 420px, Height 100px

Select an image to upload. Browse Upload

Drag and drop the image here to upload it. Ctrl →

Logo File: Companies (YOGIFON )\Yogifon\_logo.png

## Lesson 5.2: Change Images on the Welcome Page

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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

Yogifon

☆ Favorites

📊 Data Views

🕒 Time and Expenses

📅 Finance

\$ Banking

⊖ Payables

⊕ Receivables

📝 Sales Orders

🛒 Purchases

🚚 Inventory

Search...

Yogifon

?

👤

Site Preferences

NOTES

FILES

CUSTOMIZATION

TOOLS

GENERAL DEFAULTS

Home Page:

Help On Help:

Map Viewer:

Google

☒ Show Tooltips for Table Toolbar Buttons

Login Time Zone:

Interface Theme:

Default

RESET TO DEFAULT COLORS

Primary Color:

#008000

Template for External Links:

Portal External Access Link:

Display Name Order:


Eastern Modified

MENU USAGE HISTORY SETTINGS

Usage History for Search Optimization

☒ Number of Days to Keep Menu Usage History: 90

☐ Never Delete Menu Usage History

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## Lesson 5.4: Configure a Workspace

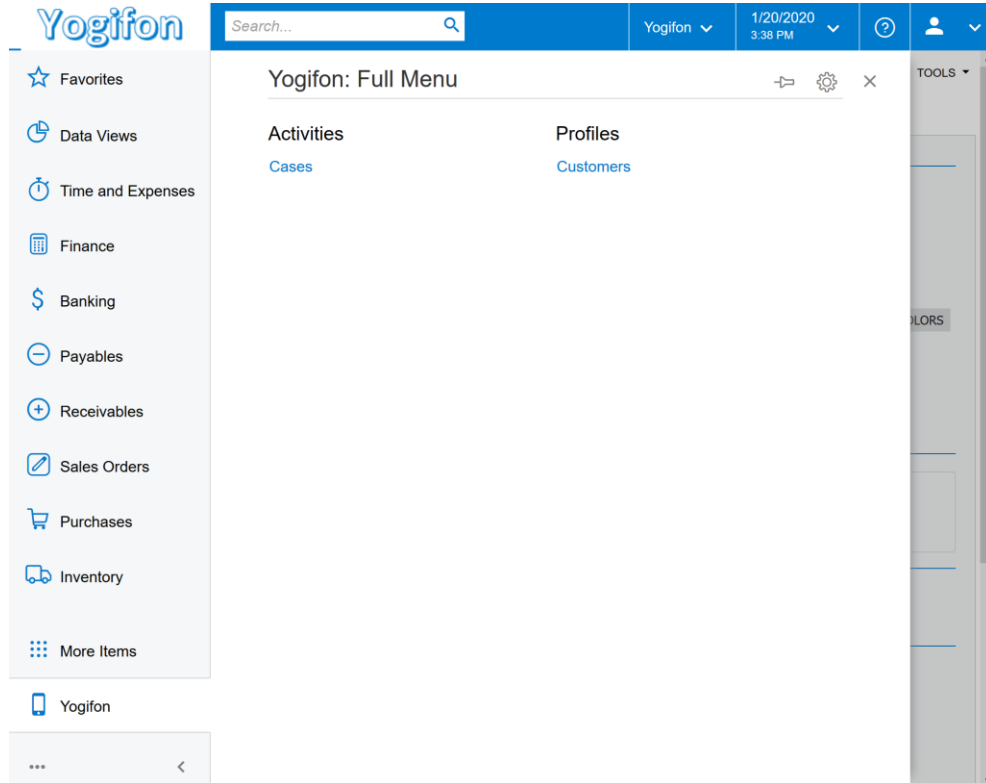
---

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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