

Development

S140 Customization Projects

Training Guide

Contents

| | |
|---|-----------|
| Copyright..... | 4 |
| Introduction..... | 5 |
| How to Use This Course..... | 6 |
| Course Prerequisites..... | 7 |
| Deploying an Acumatica ERP Instance for the Training Course..... | 8 |
| Company Story and Customization Description..... | 9 |
| Part 1: Preparing for Customization..... | 10 |
| The Customization of Acumatica ERP..... | 11 |
| Lesson 1.1: Create a Customization Project..... | 13 |
| Part 2: Customizing Acumatica ERP for Business Process Support..... | 14 |
| Initial Steps..... | 15 |
| The Customization Project Editor..... | 16 |
| Customization Items..... | 17 |
| Lesson 2.1: Add a Generic Inquiry to the Customization Project..... | 18 |
| Self-Guided Exercise: Add an Import Scenario to the Customization Project..... | 21 |
| Lesson 2.2: Update a Customization Item..... | 22 |
| Part 3: Customizing Screens..... | 23 |
| About the Element Inspector and the Screen Editor..... | 24 |
| Lesson 3.1: Add a Box to a Form..... | 25 |
| Lesson 3.2: Configure the Layout of a Form..... | 33 |
| Lesson 3.3: Add an Action to a Form..... | 39 |
| Lesson 3.4: Configure Conditions..... | 42 |
| Example 3.4.1: Make the View Invoice Action Enabled Only if the Status Field Value Is Released..... | 43 |
| Example 3.4.2: Make the Owner Field Required if the Priority or Severity Is Set to High..... | 46 |
| Self-Guided Exercise: Make the Owner Required If the Case Was Reported Earlier than Yesterday..... | 48 |
| Lesson Summary..... | 49 |
| Lesson 3.5: Add User-Defined Fields..... | 50 |
| Part 4: Managing Customization Projects..... | 54 |
| Initial Steps..... | 55 |
| Lesson 4.1: Deploy the Customization Project to a Staging Environment..... | 56 |
| Lesson 4.2: Publish Multiple Customization Projects..... | 59 |
| Part 5: Customizing the Appearance of the Acumatica ERP Instance..... | 62 |
| Lesson 5.1: Change the Company Logo..... | 63 |
| Lesson 5.2: Change Images on the Welcome Page..... | 65 |
| Lesson 5.3: Customize the Color Theme..... | 66 |
| Example 5.3.1: Change Primary Color..... | 67 |

| | |
|--|----|
| Example 5.3.2: Create and Configure a New Color Theme..... | 68 |
| Lesson Summary..... | 71 |
| Lesson 5.4: Configure a Workspace..... | 72 |

| | |
|----------------------------|-----------|
| Course Summary..... | 76 |
|----------------------------|-----------|

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Bellevue, WA 98004

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Introduction

The *S140 Customization Projects* course introduces the basic functionality of the Acumatica Customization Platform and explains how to use the Customization Tools provided by the Acumatica Customization Platform.

The course is intended for system analysts and business consultants who have experience using Acumatica ERP. It is based on an end-to-end customization task that demonstrates the general approach to customizing Acumatica ERP.

The course consists of five parts, which take a total of about four hours to complete.



We recommend that you complete the examples in the order in which they are provided in the course, because some examples use the results of previous ones.

How to Use This Course

To complete this course, you will complete the lessons from each part of the course in the order in which they are presented and then pass the assessment test. More specifically, you will do the following:

1. Read and perform the *Course Prerequisites*, and carefully read *Company Story and Customization Description*.
2. Complete the lessons in all parts of the training guide.
3. In Partner University, take *S140 Certification Test: Customization Projects*.

After you pass the certification test, you will receive the Partner University certificate of course completion.

What Is in a Part?

The first part of the course explains how to create a customization project.

The other parts of the course are dedicated to the customization of Acumatica ERP.

Each part of the course consists of lessons you should complete.

What Is in a Lesson?

Each lesson is dedicated to a particular customization scenario that you can perform by using the Acumatica Customization Tools.

Each lesson ends with a *Lesson Summary* topic, which summarizes the concepts you have learned during the lesson.

What Are the Documentation Resources?

All the links listed in the *Related Links* sections refer to the documentation available on the <https://help.acumatica.com/> website. These and other topics are also included in the Acumatica ERP instance, and you can find them under the **Help** menu.

Course Prerequisites

To complete the course successfully, you should have common knowledge of Acumatica ERP and be familiar with its user interface. Knowledge of the accounts receivable and customer relationship management capabilities of the system is desirable but not necessary.

Initial Configuration

You need to perform the prerequisite actions described in this part before you start to complete the course.

1. Make sure the environment that you are going to use for the training course conforms to the [System Requirements](#).
2. Make sure that the Web Server (IIS) features that are listed in [Configuring Web Server \(IIS\) Features](#) are turned on.
3. Deploy an instance of Acumatica ERP with the name Yogifon and a tenant that contains the *I100* data. For information on how to deploy the instance for the training course, see [Deploying an Acumatica ERP Instance for the Training Course](#).
4. Enable the *Business Account Locations* feature by doing the following:
 - a. Open the Enable/Disable Features (CS100000) form.
 - b. On the form toolbar, click **Modify**.
 - c. Select the **Business Account Locations** check box.
 - d. On the form toolbar, click **Enable**.

Deploying an Acumatica ERP Instance for the Training Course

You deploy an Acumatica ERP instance and configure it for the training course as follows:

1. Open the Acumatica ERP Configuration Wizard, and deploy a new application instance as follows:
 - a. On the **Database Configuration** page of the Acumatica ERP, type the name of the database: `Yogifon`.
 - b. On the Tenant Setup page, define one tenant with the *I100* data inserted by specifying the following settings:
 - **Login Tenant Name:** `MyCompany`
 - **New:** Selected
 - **Insert Data:** *I100*
 - **Parent Tenant ID:** 1
 - **Visible:** Selected

The system creates a new Acumatica ERP instance, adds a new tenant, and loads the selected data.

2. Sign in to the new tenant by using the following credentials:
 - Login: `admin`
 - Password: `setup`

Change the password when the system prompts you to do so.

3. Click the user name in the top right corner of the Acumatica ERP screen, and click **My Profile**. On the **General Info** tab of the User Profile (SM203010) form, which opens, select *YOGIFON* in the **Default Branch** box; then click **Save** on the form toolbar. In subsequent sign-ins to this account, you will be signed in to this branch.

Company Story and Customization Description

Suppose that you are an employee of a company that is a partner of Acumatica and develops business solutions for customers. You are going to customize Acumatica ERP for the Yogifon customer.

Yogifon, the largest satellite phone operator in the world, has decided to replace its aging ERP system with Acumatica ERP.

Further suppose that you have been assigned the following tasks to implement the customization for the project:

- Customize the Customers (AR303000) form of Acumatica ERP by doing the following:
 - Add a predefined field (**Address Type**) and a user-defined field (**Network Type**)
 - Organize the layout on the **GL Accounts** tab
 - Add an action that opens the Open Sales Orders by Customers generic inquiry; you will also import the generic inquiry
- Customize the Cases (CR306000) form of Acumatica ERP as follows:
 - Configure conditions for displaying actions and fields
 - Add a predefined field (**Time Spent**)
- Add the previously prepared generic inquiry and import scenario to the customization
- Apply the customization to the instance of Acumatica ERP in Yogifon's staging environment
- Customize the appearance of Yogifon's instance of Acumatica ERP

Part 1: Preparing for Customization

In this part of the course, you will prepare the environment for the customization of Acumatica ERP. You will learn what a customization project is in Acumatica ERP, and you will create the customization project to be used in this course.

The Customization of Acumatica ERP

By using the tools and capabilities of the Acumatica Customization Platform, you can change the user interface and business logic of Acumatica ERP, as well as build custom application modules that can be added to the system. The following diagram illustrates the different types of changes that you can make to the system within the scope of the customization process.

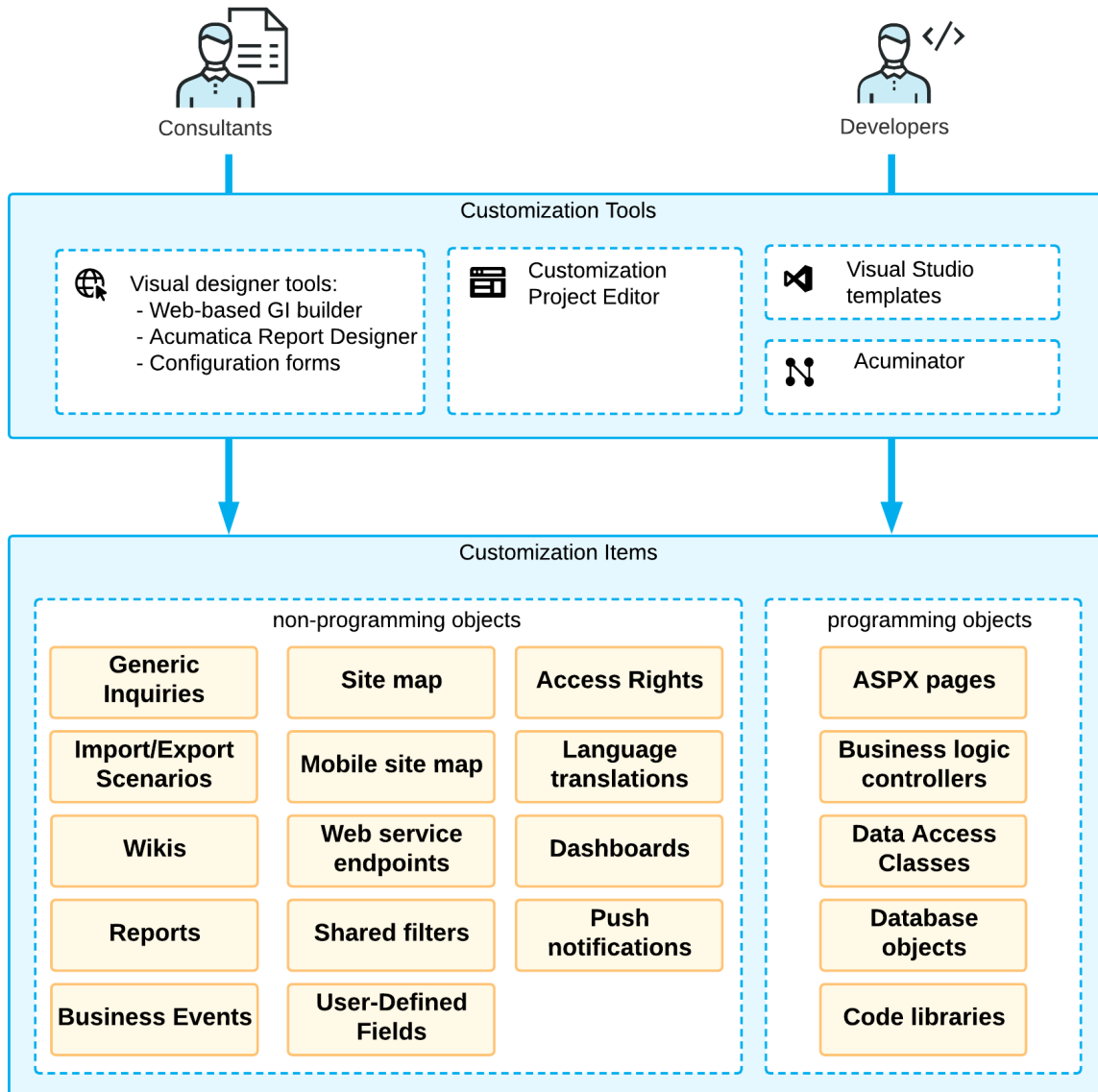


Figure: Customization of Acumatica ERP

A *customization project* is a set of changes to the user interface, configuration data, and functionality of Acumatica ERP created in a single instance. You can apply the customization project you have created to a different instance of Acumatica ERP by importing and exporting the customization project. (You will do this in [Lesson 4.1: Deploy the Customization Project to a Staging Environment](#).)

While customizing Acumatica ERP, you use the [Customization Project Editor](#) to create *customization items*, which are components that make up the customization project. The editor includes a page to support each type of item in a customization project, and you open these pages on the navigation

pane of the editor. Different types of customization items are created and managed using different customization tools.

This course covers the customization of Acumatica ERP by using the Customization Project Editor to create and manage customization items. The lessons of this course will not involve coding and do not require programming skills.

For details on creating other kinds of customization items, refer to the T series of training courses.

Related Links

[*Introduction*](#)

Lesson 1.1: Create a Customization Project

In this lesson, you will create a customization project that you will use in future lessons of this course.

A customization project holds each change you make during a particular customization effort. Before the project is published, the changes exist only in the project and are not yet applied to the instance. To apply the content of a customization project to Acumatica ERP, you have to publish the project.

For details on customization projects, see [Customization Project](#).

Lesson Objectives

As a result of completing this lesson, you will have created a customization project.

Step: Create a Customization Project

Creating a customization project is the first task in beginning any customization effort for Acumatica ERP. To create a customization project, do the following:

1. In Acumatica ERP, open the Customization Projects (SM204505) form.
2. On the form toolbar, click **Add Row**.
3. In the **Project Name** column of the added row, enter the customization project name, Yogifon.
4. Click **Save** on the form toolbar.

The Yogifon customization project is created. Now you can open Customization Project Editor for the project by clicking the project name in the table.

Lesson Summary

In this lesson, you have learned about customization projects and created one for the training course.

Related Links

[Customization Project](#)

[Managing Customization Projects](#)

Part 2: Customizing Acumatica ERP for Business Process Support

To customize Acumatica ERP so that it best supports a company's business processes, you can create and update the following entities:

- Generic inquiries
- Reports
- Dashboards
- Site map nodes
- Database scripts
- System locales
- Import and export scenarios
- Shared filters
- Access rights
- Wiki articles
- Web service endpoints
- Analytical reports
- Push notifications
- Business events

When you save any of these entities to a customization project, it is described as a *customization item*. A customization item can be a *custom* item (if you have created it) or a *customized* item (if it already existed and you modified it). When you publish the customization project on another instance, all entities saved as customization items are also applied to the instance. In this case, you don't need to import all your custom and customized entities and configure them manually on the instance where you published the project.

For the complete list of items that can be saved to a customization project, see [Types of Items in a Customization Project](#).

In this part, you will learn the basic concepts of the Customization Project Editor and configure a customization project by adding customization items to it.

Initial Steps

Before configuring a customization project, you should use the Generic Inquiry (SM208000) form to import the Sales Order by Customer generic inquiry from the `SO-OpenByCustomer.xml` file provided with the course. For details on generic inquiries, refer to the *S130: Data Retrieval and Analysis* course. If you have completed this course, you can use the generic inquiry prepared in the course.

Related Links

[To Import Data from XML](#)

The Customization Project Editor

For developing and managing the content of a customization project, Acumatica Customization Platform provides the Customization Project Editor. The editor contains separate pages to add and manage each type of customization items in the currently selected customization project.

The Customization Project Editor, shown in the following screenshot, looks like a regular webpage and consists of the following parts:

- The main menu for navigating inside the customization project
- A navigation pane, which displays the list of pages you can use to manage the corresponding customization items
- The main area, which displays the list of customization items or provides a work area to edit these items

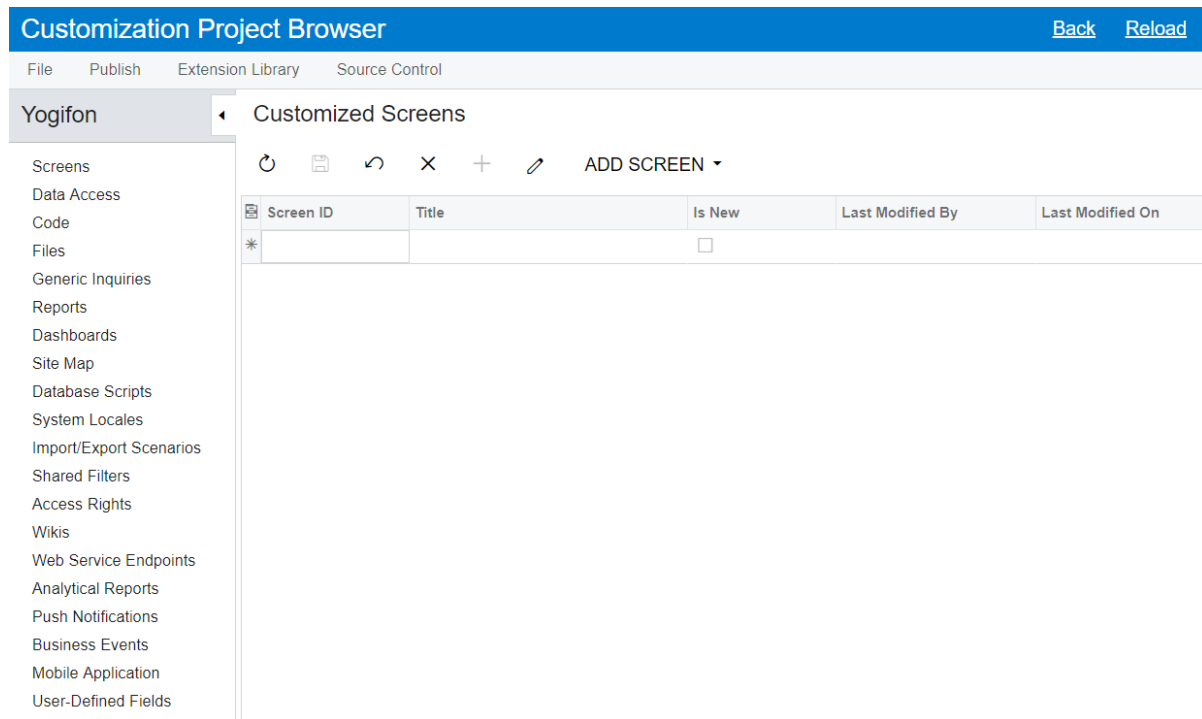


Figure: The Customization Project Editor webpage

For details, see [Customization Project Editor](#).

Related Links

[Customization Project Editor](#)

Customization Items

When you customize an instance of Acumatica ERP by using the Customization Project Editor, you create customization items. You can see all customization items of the current customization project in the navigation pane of the Customization Project Editor, sorted by their type.

For example, you can customize Acumatica ERP by adding or modifying a generic inquiry. You can include this generic inquiry in a customization project as a customization item of the Generic Inquiry type.

For the complete list of customization item types, see [Type of Items in a Customization Project](#).

Lesson 2.1: Add a Generic Inquiry to the Customization Project

Employees of the Yogifon company often need to review all sales orders, filtered by a particular customer. You have already prepared a generic inquiry to view this information. You need to include this generic inquiry in the customization project for the Yogifon company.



For details on creating generic inquiries, refer to the S130 Data Retrieval and Analysis training course.

Lesson Objectives

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

Step: Add a Generic Inquiry to the Customization Project

To add the SO-Open by Customer inquiry to the customization project, do the following:

1. Open the Customization Projects (SM204505) form.
2. Click the name of the Yogifon customization project that you created in [Lesson 1.1: Create a Customization Project](#).

The Customization Project Editor opens.

3. In the navigation pane, click **Generic Inquiries**.

The Generic Inquiries page opens.

4. On the page toolbar, click **Add New Record**.

5. In the **Add Generic Inquiries** dialog box, which opens, select the *SO-Open by Customer* inquiry, as shown in the following screenshot.

Add Generic Inquiries

×

| | <input type="checkbox"/> | * Inquiry Title | Last Modified By | LastModified |
|---|-------------------------------------|---------------------------------|------------------|--------------|
| | <input type="checkbox"/> | Customer Contacts | admin ad... | 11/19/2018 |
| | <input type="checkbox"/> | Item Availability Data | admin ad... | 11/19/2018 |
| | <input type="checkbox"/> | Modified Stock Items | admin ad... | 11/19/2018 |
| ● | <input checked="" type="checkbox"/> | SO-OpenByCustomer | admin ad... | 6/25/2019 |
| | <input type="checkbox"/> | Stock Item Attachments | admin ad... | 11/3/2015 |
| | <input type="checkbox"/> | Stock Items: Last Modified Date | admin ad... | 11/3/2015 |
| | | | | |

SAVE

CANCEL

Figure: Selection of the SO-Open by Customer inquiry

6. Click **Save.**

The generic inquiry is saved as a customization item in the customization project, as shown in the following screenshot; notice that it is listed on the Generic Inquiries page and that in the navigation pane, the system has added (1) after **Generic Inquiries**, indicating that the customization project now includes one generic inquiry.

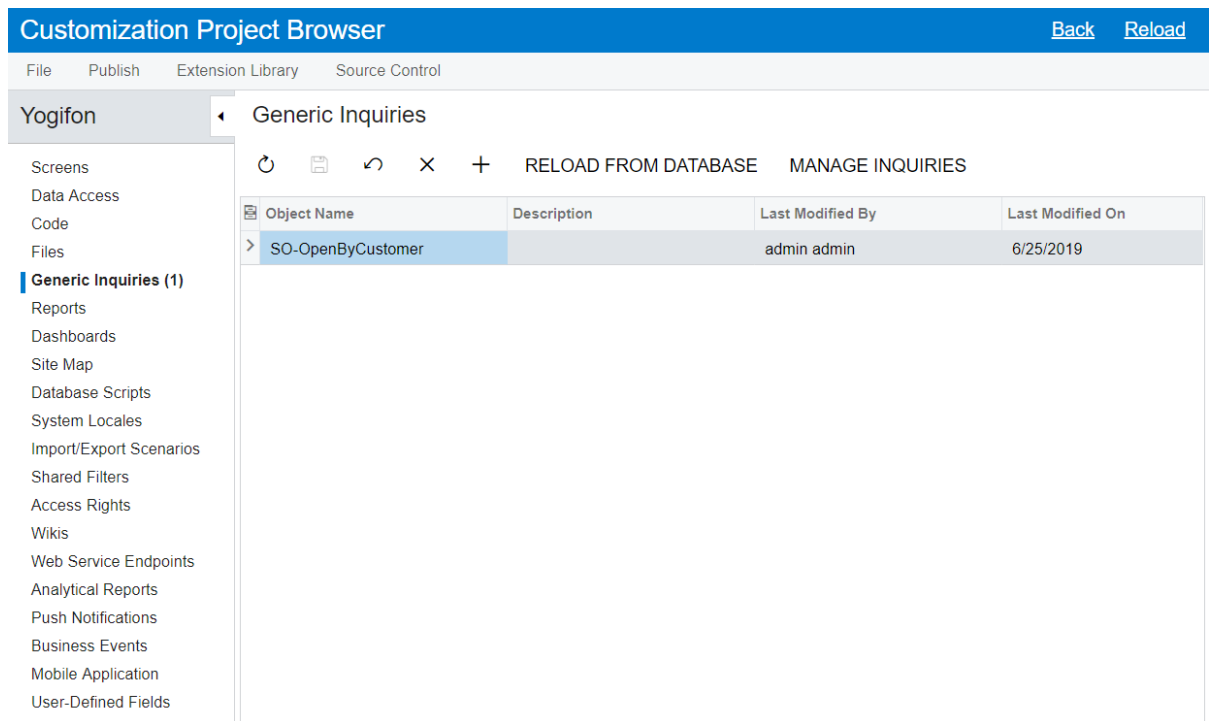


Figure: The SO-Open by Customer generic inquiry as a customization item

Lesson Summary

In this lesson, you have added a generic inquiry to a customization project.

Related Links

[To Add a Generic Inquiry to a Project](#)

Self-Guided Exercise: Add an Import Scenario to the Customization Project

In this exercise, you will add the Import GL Transactions scenario to the customization project by using the Import and Export Scenarios page of the Customization Project Editor. After you add the import scenario, the Import and Export Scenarios page should look as follows.

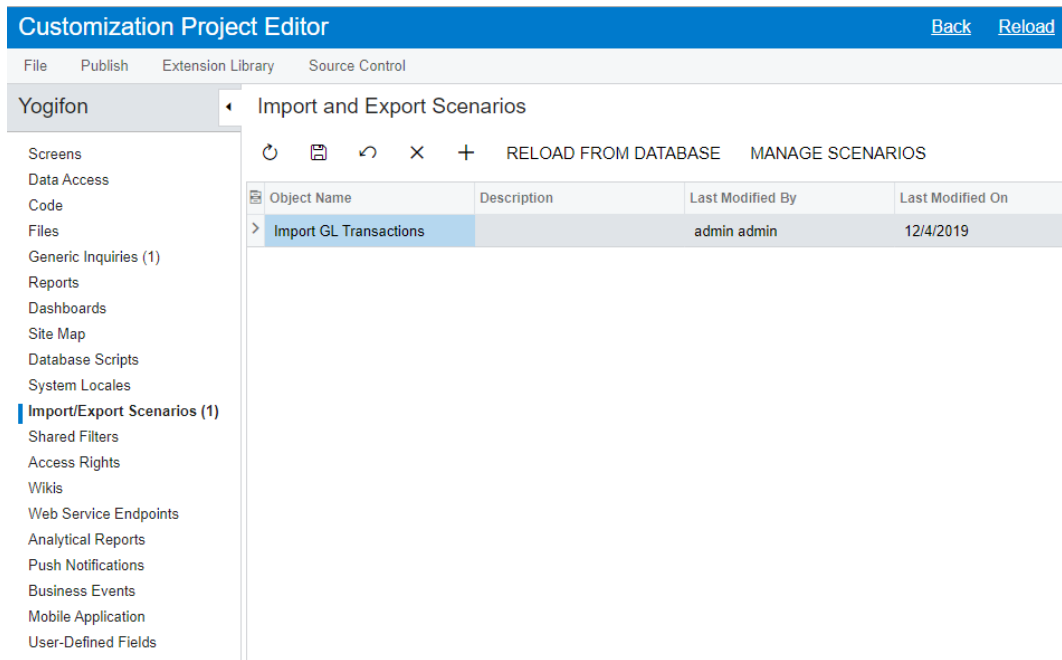


Figure: The Import and Export Scenarios page

Related Links

[Import and Export Scenarios](#)

Lesson 2.2: Update a Customization Item

When you modify an object (such as a generic inquiry, report, or dashboard) that has been added to the customization project, in the instance, information about the object is saved only to the instance database. So after modifying the object, you have to update the corresponding customization item so that the changes are saved to the customization project. In this lesson, you will modify the generic inquiry you imported in the previous lesson and then update it in the customization project.

Lesson Objectives

As you complete this lesson, you will update an generic inquiry item in a customization project.

Step 2.2.1: Modify the Generic Inquiry

You will modify the *SO-Open by Customer* generic inquiry to add a sort order. Do the following:

1. In Acumatica ERP, open the Generic Inquiry (SM208000) form.
2. In the **Inquiry Title** box, select *SO-Open by Customer*.
3. On the **Results Grid** tab, click **Add Row**.
4. In the new row, specify the following values:
 - **Active:** Selected
 - **Object:** `SOOrder`
 - **Data Field:** `Order Total`
5. Save your changes.

Step 2.2.2: Update the Generic Inquiry in the Customization Project

To update the corresponding generic inquiry customization item in the customization project, do the following:

1. Open the *Yogifon* project in the Customization Project Editor as you did in [Lesson 2.1: Add a Generic Inquiry to the Customization Project](#).
2. In the navigation pane, click **Generic Inquiries**.
3. On the page toolbar, click **Reload from Database**.

The *SO-Open by Customer* generic inquiry customization item is updated in the project.

Lesson Summary

In this lesson, you have learned how to update an item in a customization project and when you should do this.

To update an item in a customization project, you have done the following:

1. In the Customization Project Editor, open the page that lists items of this type.
2. On the page toolbar, click **Reload from Database**.

Part 3: Customizing Screens

Employees of the Yogifon company often have the need to perform the following actions in Acumatica ERP:

- Specifying the address of a customer. Specifically, the Yogifon employees need to specify an address type.
- Working with pairs of accounts and subaccounts on the **GL Accounts** tab of the Customers form.
- Accessing the Open Sales Orders by Customer inquiry for the selected customer from the Customers form.
- Processing cases on the Cases (CR306000) form more precisely, with some UI elements being available or required based on other settings.
- Specifying the network type of the customer on the Customer Locations (AR303020) form

To meet these requirements, you will complete the following customization tasks:

- Add the **Address Type** box to the Customers form
- Organize the layout of the **GL Accounts** tab of the Customers form
- Add an action that opens the Open Sales Orders by Customer inquiry directly from the Customers form
- Add conditions on the Cases form to help employees to work with the actions and settings of a case in a more streamlined way
- Add the **Network Type** user-defined field to the Customer Locations form

By using the customization tools provided by Acumatica ERP, you can complete these customization tasks.

In this part, you will customize the Customers, Cases, and Customer Locations forms by using the Element Inspector and Screen Editor, customization tools provided by Acumatica ERP.

About the Element Inspector and the Screen Editor

The customization tools provided by Acumatica Customization Platform (as described in [The Customization of Acumatica ERP](#)) include the Element Inspector and the Screen Editor.

Element Inspector

The Element Inspector helps you to start the customization of a UI element that you inspect on a particular form. The Element Inspector is a tool that you can activate and then select an element on a form. This opens the **Element Properties** dialog box, which displays reference information for the selected element. By selecting different options in the dialog box, you can view the source code of the element or start customizing it in Screen Editor. For details, see [Element Inspector](#).

Screen Editor

The Screen Editor is a visual editor that helps you to customize the visual appearance and business logic of a form. The Screen Editor is a part of the Customization Project Editor.



The term *screen* is used in reference to a form inside Customization Project Editor.

A Screen Editor page includes the following parts (see the screenshot below):

- Page toolbar (Item 1 in the screenshot): The page toolbar includes standard and page-specific buttons.
- Control tree (Item 2): This part of the form contains all UI elements currently displayed on the form, as well as layout rules and dialog boxes.
- Tabs area (Item 3): You use each tab as you customize the UI element selected in the control tree.

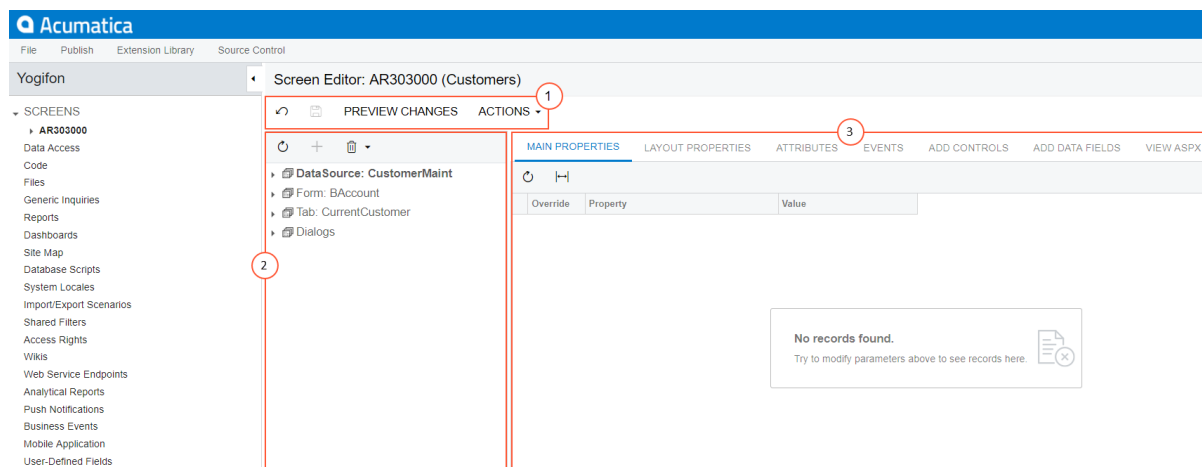


Figure: Screen Editor page

For details on the Screen Editor, see [Screen Editor](#).

Lesson 3.1: Add a Box to a Form

In this lesson, you will add a box for a customer's address type to the Customers (AR303000) form by using the Screen Editor of Customization Project Editor. The new box should look as shown in the following screenshot, with the *Business*, *Home*, and *Other* options available for selection.

Customers

Customers

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

* Customer ID: [Field] * Status: Active Balance: 0.00
 * Customer Name: [Field] Prepayment Balance: 0.00

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS

MAIN CONTACT

Company Name: [Field]
 Attention: [Field]
 Email: [Field] [Icon]
 Web: [Field] [Icon]
 Phone 1: [Field]
 Phone 2: [Field]
 Fax: [Field]
 Account Ref.#: [Field]

MAIN ADDRESS

Type: Business [Dropdown]
 Address Line 1: [Field]
 Address Line 2: [Field]
 City: [Field]
 * Country: US - United States of America [Field]
 State: [Field]

FINANCIAL SETTINGS

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

CREDIT VERIFICATION RULES

Credit Verification: Disabled [Field]
 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: [Field]

Figure: The Address Type box on the Customers form

Lesson 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

Step 3.1.1: Open the Form in the Screen Editor

To start customizing a form using the form as a starting point, you should open it in the Screen Editor by doing the following:

1. In Acumatica ERP, open the Customers (AR303000) form.
2. On the right side of the title toolbar, click **Customization > Inspect Element**.
3. Click the **General Info** tab area on the form.

The **Element Properties** dialog box is shown. See the following screenshot.

The screenshot shows the Acumatica interface with the 'Customers' form. The 'Element Properties' dialog box is open, displaying the following information:

| Element Properties | |
|--------------------|-----------------|
| Control Type: | Tab |
| Data Class: | Customer |
| View Name: | CurrentCustomer |
| Business Logic: | CustomerMaint |

Below the dialog box, the 'FINANCIAL SETTINGS' section is visible, showing various balance and limit values:

| | |
|-------------------------|------|
| 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: | |

Figure: The Element Properties dialog box

The dialog box displays various properties of the UI element you clicked (in this case, the tab area); these properties define the visual appearance and business logic of the element. For more information, see [Customizing Business Logic](#).

4. In the **Element Properties** dialog box, click **Customize**.
5. In the **Select Customization Project** dialog box, which is opened, select the *Yogifon* project name, and click **OK**.

The Customers form is opened in the Screen Editor, as shown in the following screenshot.

The screenshot shows the Acumatica Screen Editor for the 'Yogifon' project. The 'Screen Editor: AR303000 (Customers)' is open. The left pane shows the 'SCREENS' list with 'AR303000' selected. The main area displays the form structure with the following components:

- DataSource: CustomerMaint
- Form: BAccount
- Tab: CurrentCustomer
- Dialogs

The 'MAIN PROPERTIES' tab is active, showing a table with columns 'Override', 'Property', and 'Value'. A message box at the bottom right states: 'No records found. Try to modify parameters above to see records here.'

Figure: The Customers form in the Screen Editor



Instead of using the Element Inspector, you can open the form in the Screen Editor as follows: In the Customization Project Editor, click **Screens** in the navigation pane. On the Customized Screen toolbar, click **Add Screen** > **Customize Existing Screen**, and select the form ID in the dialog box which opens.

The Control Tree of the Customers Form

The control tree of the Screen Editor contains a list of the elements that are displayed on the form and the layout rules that organize the elements into rows and columns. (You can see the list of all controls that can be added to a form on the **Add Controls** tab of the Screen Editor.)

The first element of the control tree is the **DataSource** node. It contains all actions defined for the form. The actions displayed on the form toolbar (both standard and form-specific) are located in the **Toolbar** node. All other actions of the form are located in the **Other** node. The actions of the Customers (AR303000) form, as displayed in the control tree, are shown in the following screenshot.

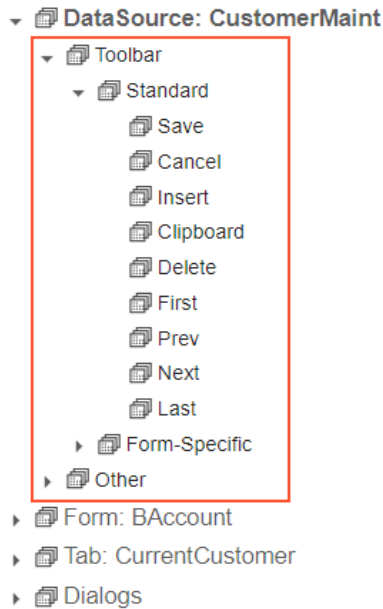


Figure: Actions of the Customers form

The remaining top-level elements are containers:

- The form's Summary area (defined by the **Form: Baccount** node in the screenshot above).
- A tab area with tab items (defined by the **Tab: CurrentCustomer** node in the screenshot above).
- Dialog boxes (defined in the **Dialogs** node). It contains definitions for all dialog boxes that can be displayed on the form.

The top element of each container is an element of the Column or Row type that specifies the layout rule for elements located inside it. You will learn about layout rules in [Lesson 3.2: Configure the Layout of a Form](#).

Step 3.1.2: Add the Field to the Form

In this step, you will add a box containing an address type to the **Main Address** section of the **General Info** tab as follows:

1. On the Customers (AR303000) form, locate the **Main Address** section. It is located in the first column of the **General Info** tab of the tab area, as shown in the following screenshot. Locating the section on the tab will help you to find it in the control tree.

Customers

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

* Customer ID: [Text Box] * Status: Active ▾ Balance: 0.00
 * Customer Name: [Text Box] Prepayment Balance: 0.00
 Retained Balance: 0.00

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS

MAIN CONTACT

Company Name: [Text Box]
 Attention: [Text Box]
 Email: [Text Box] [Email Icon]
 Web: [Text Box] [Web Icon]
 Phone 1: [Text Box]
 Phone 2: [Text Box]
 Fax: [Text Box]
 Account Ref.#: [Text Box]

FINANCIAL SETTINGS

* Customer Class: LOCAL - Domestic Customers [Edit Icon]
 Terms: 30D - 30 Days [Edit Icon]
 * Statement Cycle ID: EOM [Edit Icon]
☐ Auto-Apply Payments
☐ Apply Overdue Charges
☒ Enable Write-Offs
 Write-Off Limit: 10.00
 Currency ID: USD [Edit Icon] ☒ Enable Currency Override
 Curr. Rate Type: [Text Box] [Edit Icon] ☐ Enable Rate Override

RETAINAGE SETTINGS

☐ Apply Retainage
 Retainage Percent: 0.000000

CREDIT VERIFICATION RULES

Credit Verification: Limit and Days Past Due ▾
 Credit Limit: 10,000.00
 Credit Days Past Due: 90
 Unreleased Balance: 0.00

MAIN ADDRESS

☐ Validated
 Address Line 1: [Text Box]
 Address Line 2: [Text Box]
 City: [Text Box]
 * Country: US - United States of America [Edit Icon]
 State: [Text Box] [Edit Icon]
 Postal Code: [Text Box] [VIEW ON MAP]

Figure: The location of the Main Address section

2. In the control tree of the Screen Editor for the Customers form, navigate to the node corresponding to the **Main Address** section as follows: open **Tab: CurrentCustomer** > **General Info** > **Column (first)** > **Form: DefAddress**.



If needed, you can use the Element Inspector to open the **Main Address** section in the Screen Editor.

3. Select the **Add Data Fields** tab.
4. Make sure that the *Address* data view and the **Visible** tab are selected, as shown in the following screenshot.

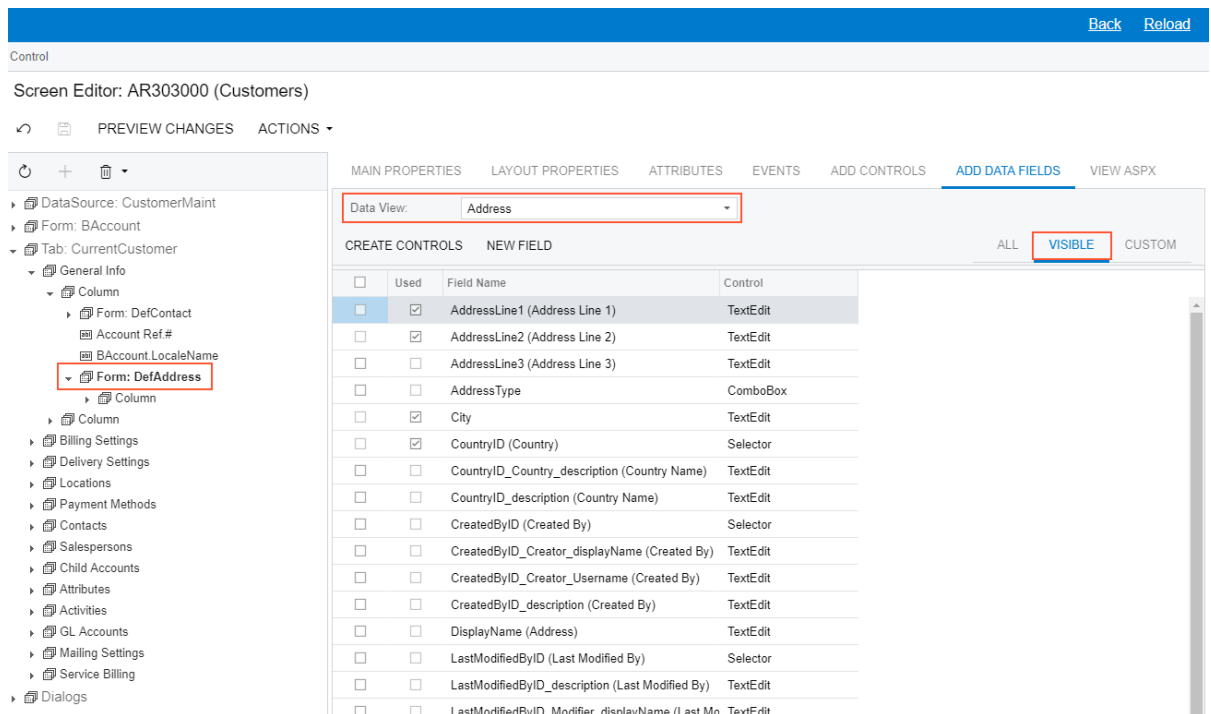


Figure: The Add Data Fields tab

The table on this tab shows all UI elements that are available for the selected control—in this case, the **Main Address** section of the Customers form. These UI elements are determined by the *Address* data view. For details on data views, see [Data View](#).

5. In the table, select the unlabeled check box in the row with the *Address Type* field.
6. On the table toolbar, click **Create Controls**.

The **AddressType** node appears in the control tree, as shown in the following screenshot. Notice that it is listed below the other nodes at its level.

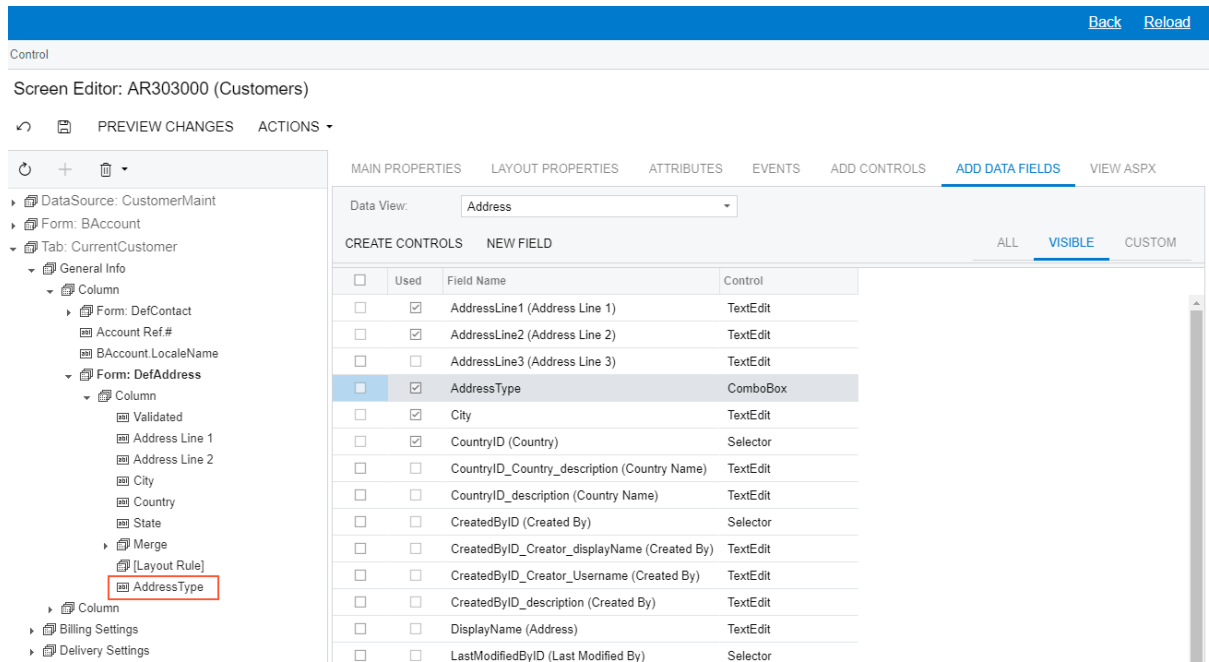


Figure: Addition of the Address Type field

7. Save your changes, either by clicking **Save** on the page toolbar or by pressing Ctrl+S on the keyboard.

Step 3.1.3: Adjust the Properties of the New Field

In this step, you will specify the properties of the **Address Type** field. Do the following:

1. In the control tree, select the **Address Type** node.
2. Adjust the position of the node by dragging it: Place the node after the **Validated** node, as shown in the following screenshot.

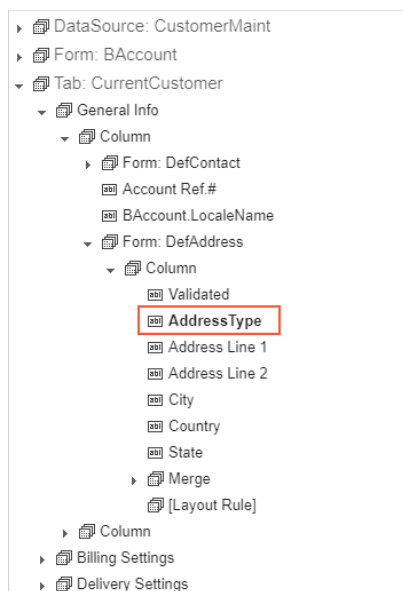


Figure: Placement of the new element in the control tree

3. Select the **Main Properties** tab.

4. Set the **Display Name** property value to *Type*.
5. Save your changes.
6. On the page toolbar, click **Preview Changes**.

A new window opens displaying the customized Customers form.

7. On the opened Customers form, in the **Main Address** section of the **General Info** tab, make sure the **Address Type** combo box is displayed at the top of the **Main Address** section, and check the list of possible values, as shown in the screenshot below.



The list of possible values is defined by the `[AddressTypes.List()]` attribute and the `AddressTypes` class. The default value is determined by the `PXDefault` attribute. You can see the list of attributes of a field by exploring the **Attributes** tab of the Screen Editor for the **Address Type** element. For details, see [Working with Attributes](#) or refer to the *T200 Maintenance Pages* training course.

Screen Title

NOTES FILES CUSTOMIZATION HELP

SAVE & CLOSE

Customer ID: * Status: Active Balance: 0.00

Customer Name: * Prepayment Balance: 0.00

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS PAYMENT METHODS CONTACTS SALESPERSONS

MAIN CONTACT

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

MAIN ADDRESS

AddressType: Business Address Line 1: Business Address Line 2: Home Other City: * Country: US - United States of America State: Postal Code: VIEW ON MAP

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 Remaining Credit Limit: 0.00 First Due Date:

PERSONAL DATA PRIVACY

Consented to the Processing of Personal Data

Figure: The Address Type element



The **Validated** element you have seen in the **Form: DefAddress** node of control tree is not displayed on the form because its **Enabled** property is set to *false* by default. You can change this property in the Screen Editor.

Step 3.1.4: Apply the Customization to an Instance

When you preview changes to a form in the Customization Project Editor, the changes are available only in the editor and have not yet been applied to the instance. To apply these changes to the instance, you should publish the customization project by doing the following:

1. In the main menu of the Customization Project Editor, select **Publish > Publish Current Project**.

The **Compilation** pane appears at the bottom of the Customization Project Editor window. First, validation of the project is performed. This validation involves checking for syntax and semantics and making sure the changes included in the customization project are compatible with the original application code. Then the project is published. When the *Website updated.* line appears in the **Compilation** pane, the publishing has finished successfully.

2. Close the **Compilation** pane.

Step 3.1.5: Test the New Element

After you have published the customization project, you can test the box added to the Customers (AR303000) form by doing the following:

1. In Acumatica ERP, open the Customers form.
2. Open the record with the *C000000001* customer ID.
3. On the **General Info** tab (the **Main Address** section), in the **Address Type** box, select *Home*.
4. On the form toolbar, click **Save**.

The changes are saved.

Lesson Summary

In this lesson, you have learned how to use the Screen Editor for adding and configuring a field. To apply changes to the instance, you have published the customization project. After that, you have tested the new field.

Lesson 3.2: Configure the Layout of a Form

You use the Screen Editor to configure the layout of a form by adding and editing layout rules. In this lesson, you will organize the layout of the **GL Accounts** tab of the Customers (AR303000) form into two columns, as shown in the following screenshot.

The screenshot displays the 'Customers' form with the 'GL ACCOUNTS' tab selected. The form is organized into two columns. The left column contains sections for 'ACCOUNTS RECEIVABLE', 'SALES', and 'CASH DISCOUNT', each with fields for account and sub-account. The right column contains sections for 'FREIGHT', 'DISCOUNT', and 'PREPAYMENT', also with corresponding fields. The top of the form includes a header with 'Customers' and navigation tabs like 'NOTES', 'FILES', 'CUSTOMIZATION', and 'TOOLS'. Below the header is a toolbar with icons for saving, undo, redo, and other actions. The main content area is divided into tabs: 'GENERAL INFO', 'BILLING SETTINGS', 'DELIVERY SETTINGS', 'LOCATIONS', 'PAYMENT METHODS', 'CONTACTS', and 'GL ACCOUNTS'.

Figure: The needed layout of the GL Accounts tab

Lesson Objectives

As you complete this lesson, you will do the following:

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

Step: Configure the Layout of a Form

In this step, you will organize the UI elements on the **GL Accounts** tab into two columns and place two fields in a group. Do the following:

1. Open the Customers (AR303000) form, and use the Element Inspector to open the Screen Editor for the **GL Accounts** tab in the Screen Editor.



As another way to open the Screen Editor from the Customers form, you can click the **GL Accounts** tab area while holding Ctrl + Alt. In the **Element Properties** dialog box, which opens, click **Customize**.

2. In the control tree, navigate to **Tab: CurrentCustomer > GL Accounts > Column**.
3. Open the **Column** node, and explore the elements inside it.

The elements of the **GL Accounts** tab are organized into one column by using the *Column* layout rule. Some of the elements are in the **Form: DefLocation** element, which also contains the **Column** element but appears in the same column. This is because the **Column** elements are nested: The **Column** element in the **Form:DefLocation** node organizes the elements of the **Form:DefLocation** container into a single column.

4. On the **Add Controls** tab, drag a **Column** element (in the **Layout Rules** section) to the control tree and place it after the **Column** element of the **GL Accounts** node, as shown in the following screenshot.

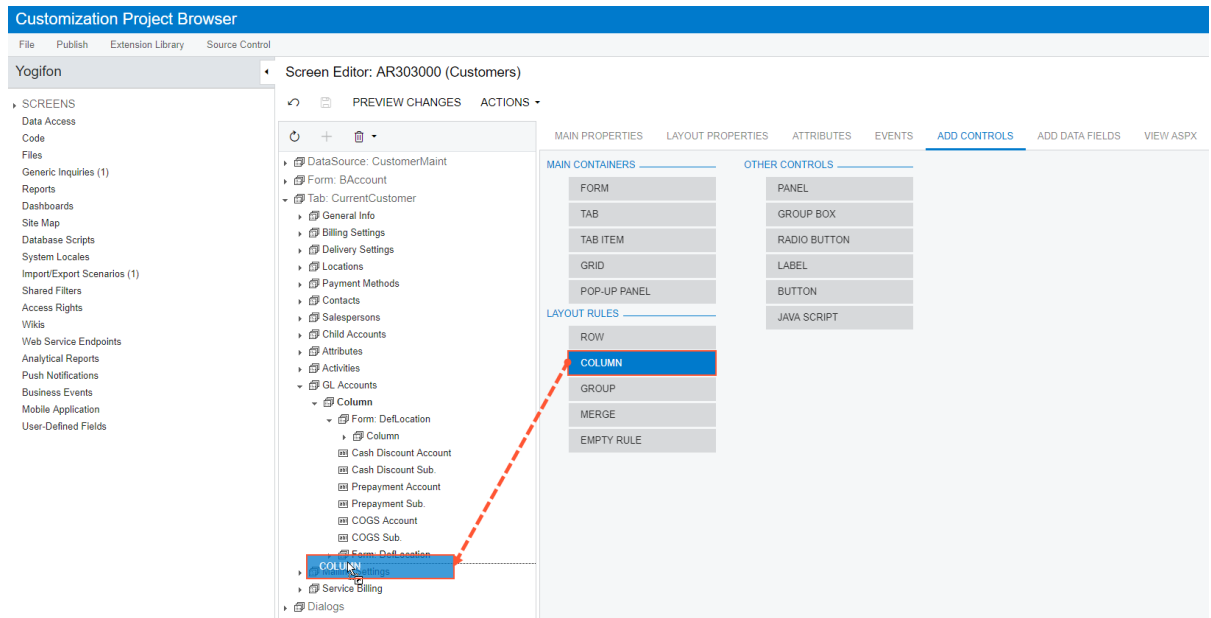


Figure: The Column element being dragged

5. In the control tree, drag the following elements from the first **Column** node of the **GL Accounts** node to the added **Column** element, so that the control tree appears as shown in the screenshot below:

- **Cash Discount Account**
- **Cash Discount Sub.**
- **Prepayment Account**
- **Prepayment Sub.**
- **Form: DefLocation** (the second one)



The control tree also includes the **COGS Account** and **COGS Sub.** elements. They are never displayed in the UI, so you can ignore them.

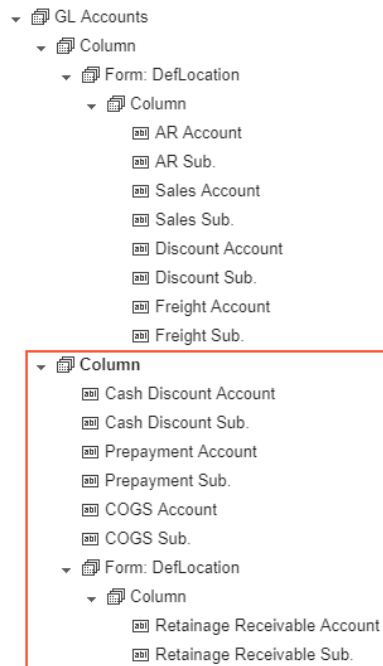


Figure: The relocated elements

6. Configure the added column as follows: Select the second **Column** node in the control tree, and on the **Layout Properties** tab, specify the following values:

- **ControlSize:** *XM*
- **LabelsWidth:** *M*

For details on size values, see [Predefined Size Values](#).

7. On the **Add Controls** tab, drag the **Group** element to the control tree and place it after the **Column** node in the **Form: DefLocation** element, as shown in the screenshot below.

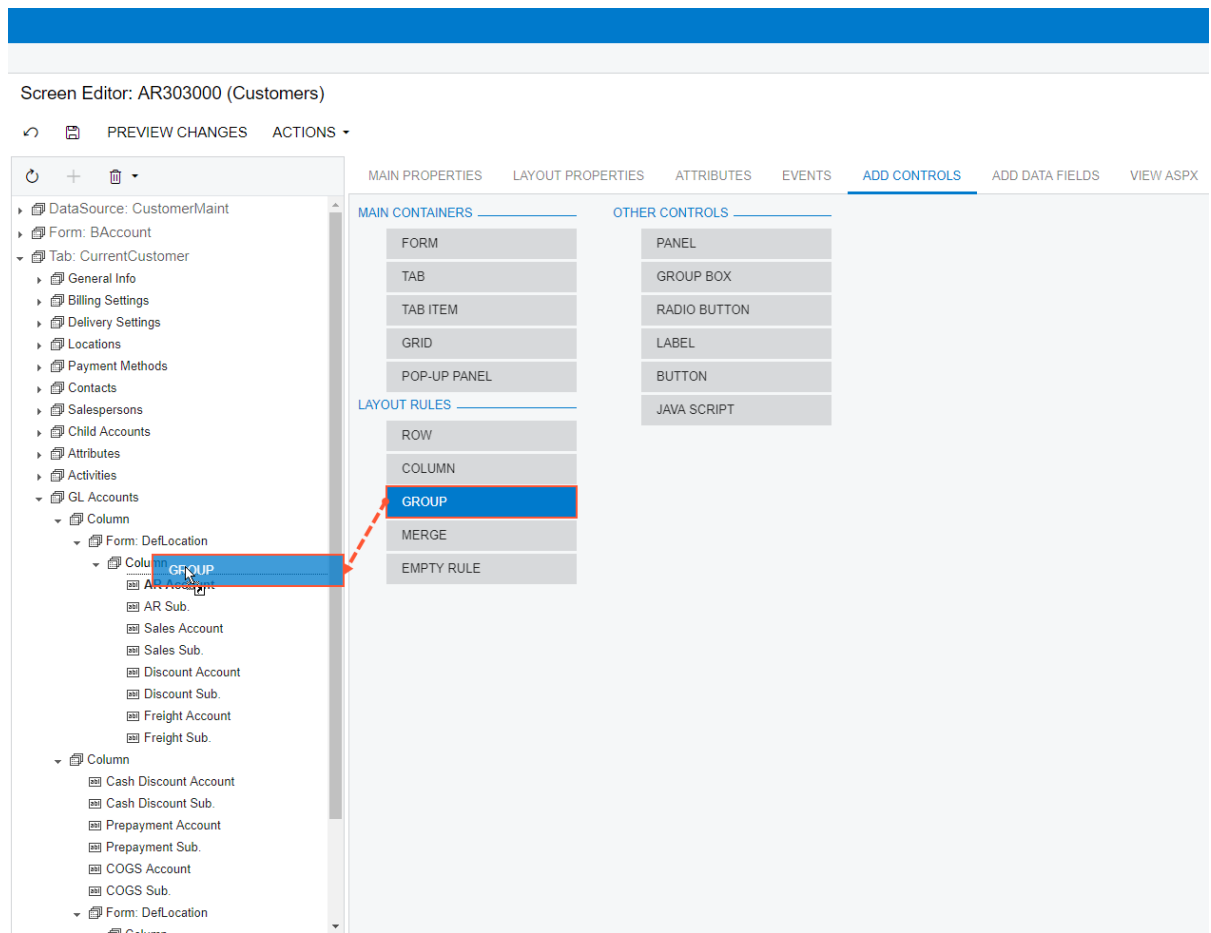


Figure: The Group element being dragged

You will eventually put each pair of account and subaccount elements into a separate **Group** element, so that each pair is displayed in a section on the Customers form. Currently, all elements in the **Column** elements are located in the **Group** node. (You will fix this when you add the other **Group** elements.)

8. Configure the **Group** element as follows: On the **Layout Properties** tab, set the **GroupCaption** property value to *Accounts Receivable*, and save your changes.
9. Repeat the two previous instructions for each pairs of the account and subaccount elements. For the **GroupCaption** property values, use the type of the account.

When you are finished, the control tree should look as shown in the following screenshot.

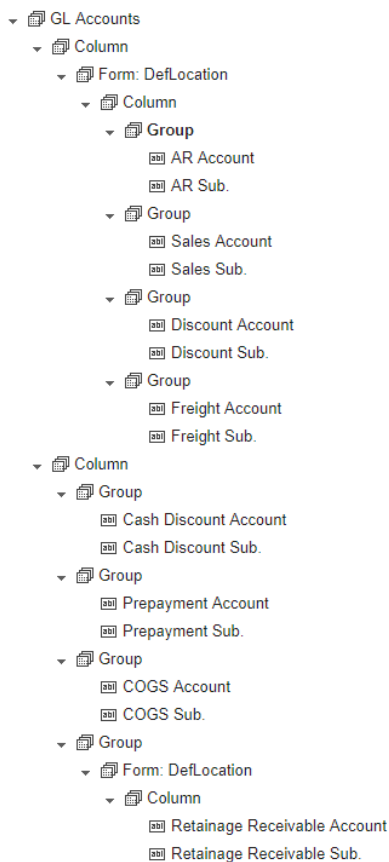


Figure: The control tree with the groups configured and moved into two columns

10. To preview the resulting layout, click **Preview Changes** on the page toolbar. The **GL Accounts** tab should look as follows.

Screen Title NOTES FILES CUSTOMIZATION HELP ▾

SAVE & CLOSE ↺ ↻ + ↻ ▾ 🗑️ ⏪ ⏩ ⏴ ⏵ ACTIONS ▾ INQUIRIES ▾ REPORTS ▾

* Customer ID: * Status: Active ▾
 * Customer Name:

Balance: 0.00
 Prepayment Balance: 0.00

GENERAL INFO
BILLING SETTINGS
DELIVERY SETTINGS
PAYMENT METHODS
CONTACTS
SALESPERSONS
ATTRIBUTES
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

Figure: The GL Accounts tab

11. Publish the customization project.

Self-Guided Exercise: Separating the Required and Optional Elements into Separate Columns

In this exercise, which you will perform on your own, you use the control tree to put all required elements of the **GL Accounts** tab in the first column and all optional elements in the second column.



The required elements are the ones marked by an asterisk on a form.

See the following screenshot, which shows the resulting layout of the **GL Accounts** tab, with the required elements in the left column.

Screen Title

NOTES FILES CUSTOMIZATION HELP

SAVE & CLOSE [Icons] ACTIONS INQUIRIES REPORTS

* Customer ID: [Field] * Status: Active Balance: 0.00

* Customer Name: [Field] Prepayment Balance: 0.00

GENERAL INFO BILLING SETTINGS DELIVERY SETTINGS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES **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

CASH DISCOUNT

* Cash Discount Account: 595000 - Cash Discount Given

* Cash Discount Sub.: 000-00-00 - Non-specific

FREIGHT

Freight Sub.: [Field]

Freight Account: [Field]

DISCOUNT

Discount Sub.: [Field]

Discount Account: [Field]

PREPAYMENT

Prepayment Acco... 244000 - Customer Deposits

Prepayment Sub.: 000-00-00 - Non-specific

Figure: The GL Accounts tab

After you have previewed the changes and made sure the layout looks as intended, publish the customization project.

Lesson Summary

In this lesson, you have configured the layout of the **GL Accounts** tab of the Customers (AR303000) form. You have arranged the elements into two columns and several groups.

Related Links

[To Add a Layout Rule](#)

Lesson 3.3: Add an Action to a Form

Actions can be displayed on the form toolbar (in the **Actions** menu, in other menus, or as separate buttons) and in other areas of the form.

By using the Screen Editor, you can add the following types of actions to a form toolbar: generating a report, navigating to a substitute form, and navigating to a form where you can create a particular record.

In this lesson, you will add an action to the Customers (AR303000) form that opens the Sales Orders by Customer inquiry.

Lesson Objectives

As you complete this lesson, you will do the following:

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

Step 3.3.1: Add an Action to the Customers Form

To add an action to the Customers (AR303000) form to open the Open Sales Orders by Customers inquiry, do the following:

1. Open the Customers form in the Screen Editor.
2. In the control tree, navigate to the node corresponding to the **Inquiries** menu as follows: **Data Source: CustomerMaint > Toolbar > Form-Specific > Inquiries**. Click the **Inquiries** node.



Instead of performing these two instructions, you can do the following: On the Customers form, click the **Inquiries** menu while holding Ctrl + Alt. In the **Element Properties** dialog box, click **Customize**.

3. On the toolbar of the control tree, click **Add New Action**.
4. In the **New Action** dialog box, which opens, specify the following values:

- **Action Type:** *Navigation: Search Records*

This type of action provides redirection to a generic inquiry. For details on other types of actions, see [To Add an Action](#).

- **Action Name:** `SOOpenByCustomer`



This is not the name that is displayed in the UI but the internal name of the action that will be used in the auto-generated code of the action.

- **Select Screen:** *GI400001 (Open Sales by Customer; see the selection of this screen in the following screenshot)*

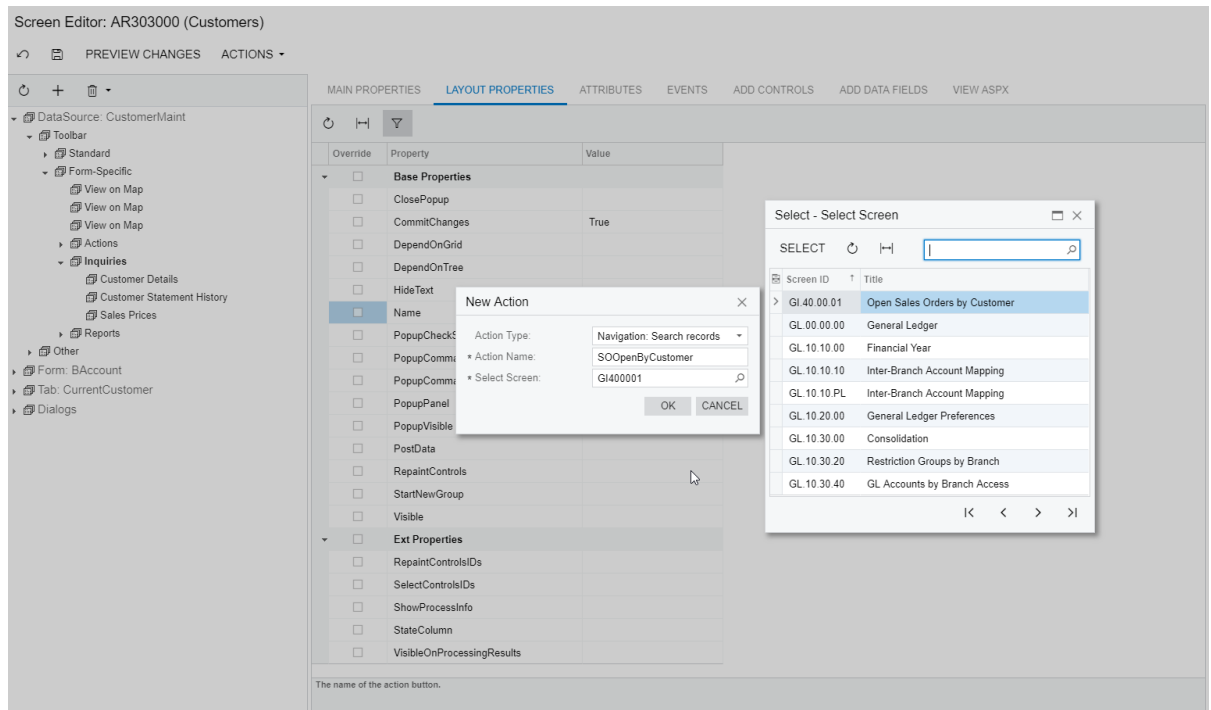


Figure: The New Action dialog box

5. Click OK.

The dialog box is closed, and the new element appears in the control tree.

6. Select the **SOOpenByCustomer node in the control tree.**

7. On the **Main Properties tab, assign the following properties to the element:**

- **Display Name:** *Open SO by Customer*
- **Window Mode:** *New Tab*
- **Visible:** *True*

8. Save your changes, and publish the customization project.

Step 3.3.2: Test the New Action

To test the action you have added, do the following:

- 1.** In Acumatica ERP, open the Customers (AR303000) form.
- 2.** Open any customer record on the form.
- 3.** On the form toolbar, select **Inquiries** > **Open SO by Customer**, as shown in the following screenshot.

Customers

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

* Customer ID: C000000001 * Status: Active Balance Prepay

* Customer Name: Jersey Central Office Equip

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

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

CREDIT VERIFICATION RULES

Open SO by Customer

Figure: The Open SO by Customer action

Make sure that the Open Sales Orders by Customer inquiry opens in a new tab.

Lesson Summary

In this lesson, you have learned which types of actions you can add using the Screen Editor. You have added an action to the **Inquiries** menu of the Customers (AR303000) form toolbar and tested the action.

To add an action, you have done the following:

1. Opened the form in Screen Editor.
2. Selected the appropriate node of the control tree.
3. Added a new element by using the button on the control tree toolbar.
4. In the **New Action** dialog box, specified the action type, name, and screen that the action causes the system to open.
5. Configure the properties of the action.
6. Save your changes.

Related Links

[To Add an Action](#)

Lesson 3.4: Configure Conditions

In the Screen Editor, you can configure conditions. Depending on whether a condition is met, you can change the following properties of any UI element:

- **Visibility:** You can make the element visible or invisible.
- **Required:** You can make the element required or optional.
- **Enabled:** You can enable or disable the element (that is, make it available or unavailable to be invoked).

These properties are located on the **Main Properties** tab of the Screen Editor.

In this lesson, you will configure the following conditions for elements on the Cases (CR306000) form:

1. Make the **View Invoice** action enabled only if the value in the **Status** box is *Released*.
2. Make the **Owner** element required if the value in the **Priority** or **Severity** box is *High*.
3. Make the **Owner** element required if the case was reported earlier than yesterday. (You will configure this condition as part of a self-guided exercise.)

You configure conditions on the Conditions page of the Screen Editor and then specify a condition on the **Main Properties** tab of a needed element.

Lesson Objectives

As you complete this lesson, you will 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 configure this condition for the **View Invoice** action.

First you need to learn the internal name of the element that is used in the condition (which in this case is the `Status` field). The names of the elements on the UI usually match their internal names defined in the source code, but sometimes the UI name of the element is different. You can learn the name of the element by using the Element Inspector as follows:

1. On the Cases form, select **Customization** > **Inspect Element**.
2. Click the **Status** box.

The **Element Properties** dialog box appears, as shown in the following screenshot. The internal name of the field is displayed in the **Data Field** box.

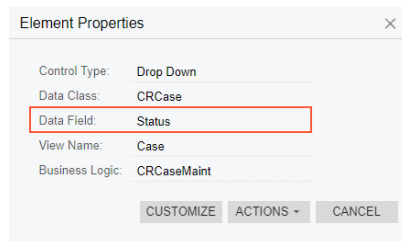


Figure: The Status element properties

As you can see, the name of the field is the same as the name of the box: *Status*.

Now that you have learned the name of the element that you plan to use in the condition, you need to add and configure the condition. You will then specify this condition as a value for the **Enabled** property of the **View Invoice** action. Do the following:

1. Open the Customized Screens page of Customization Project Editor by clicking **Screens** in the navigation pane of Customization Project Editor.
2. On the page toolbar, click **Add Screen** > **Customize Existing Screen**.
3. In the **Customize Existing Screen** dialog box, which opens, in the **Select Screen** box, select the *Cases (CR306000)* form.
4. In the navigation pane, navigate to **Screens** > **CR306000** > **Conditions**, and click the **Conditions** node.

The Conditions: CR306000 (Cases) page opens, as shown in the following screenshot.

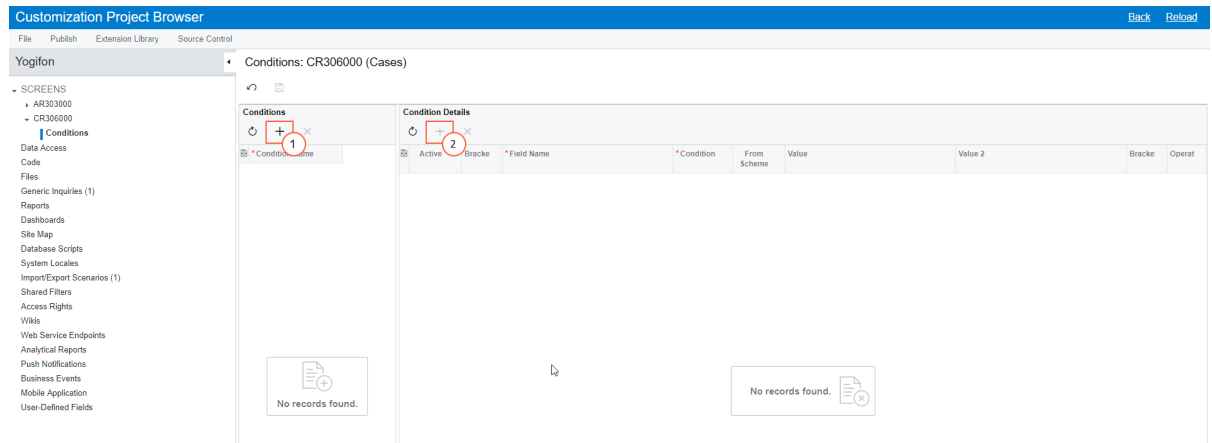


Figure: The Conditions page

5. Add the condition as follows:
 - a. In the **Conditions** pane, click **Add Row** (see Item 1 in the screenshot above).
 - b. In the **Condition Name** column, enter the name of the condition: *StatusReleased*.
 - c. In the **Conditions** pane, click the *StatusReleased* row.
 - d. In the **Condition Details** pane, click **Add Row** (Item 2).
 - e. Select the following values in the new row:
 - **Field Name:** *Status*
 - **Value:** *Released*
 - f. Save your changes.
6. In the navigation pane, navigate to **Screens > CR306000** and click **CR306000**.
7. Specify the condition as a value for the **Enabled** property of the **View Invoice** action as follows:
 - a. In the control tree, navigate to **DataSource: CRCaseMaint > Toolbar > Form-Specific > Inquiries > View Invoice**; click **View Invoice** (see the following screenshot).
 - b. On the **Main Properties** tab, in the row with the **Enabled** property, select *StatusReleased*, as is also shown in the following screenshot.

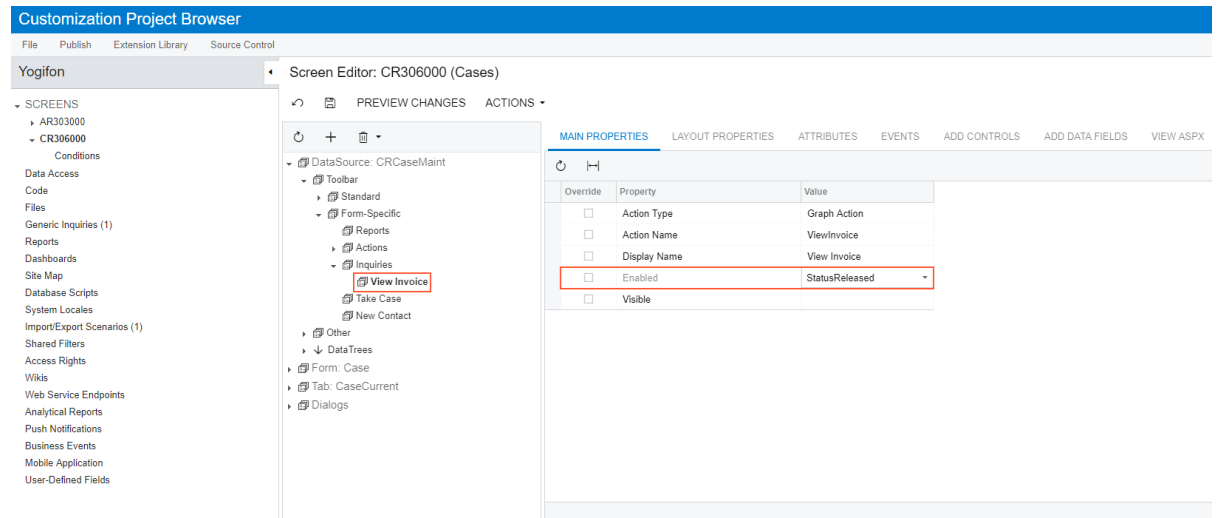


Figure: Specification of the condition as a property value

c. Save your changes.

8. Publish the customization project.

Now you can test the condition. Do the following:

1. In Acumatica ERP, open the Cases form.
2. Open the case with the 000001 ID.
3. Make sure the **View Invoice** action in the **Inquiries** menu is visible but disabled. This is because the status of the case is not *Released*.
4. To close the case, in the **Status** box, select *Closed*; save your changes.
5. On the form toolbar, select **Actions** > **Release**.
6. Make sure the **View Invoice** action in the **Inquiries** menu is now enabled.
7. Click **View Invoice**.

The Invoices and Memos (AR301000) form should open.

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 configure this condition for the **Owner** box. Do the following:

1. Open the Cases (CR306000) form in the Screen Editor.
2. In the navigation pane, select **Screens > CR306000 > Conditions**.
3. On the Conditions page, add the condition as follows:
 - a. In the **Conditions** pane, click **Add Row**.
 - b. In the **Condition Name** column, enter the name of the condition: *PriorityOrSeverityHigh*.
 - c. In the **Conditions** pane, click the *PriorityOrSeverityHigh* row.
 - d. In the **Condition Details** pane, click **Add Row**.
 - e. Specify the following values in the new row:
 - **Field Name:** *Priority*
 - **Condition:** *Equals*
 - **Value:** *High*
 - **Operator:** *Or*
 - f. Add a new row after the first one, and specify the following values:
 - **Field Name:** *Severity*
 - **Condition:** *Equals*
 - **Value:** *High*
- g. Save your changes.

The condition should look as shown in the following screenshot.

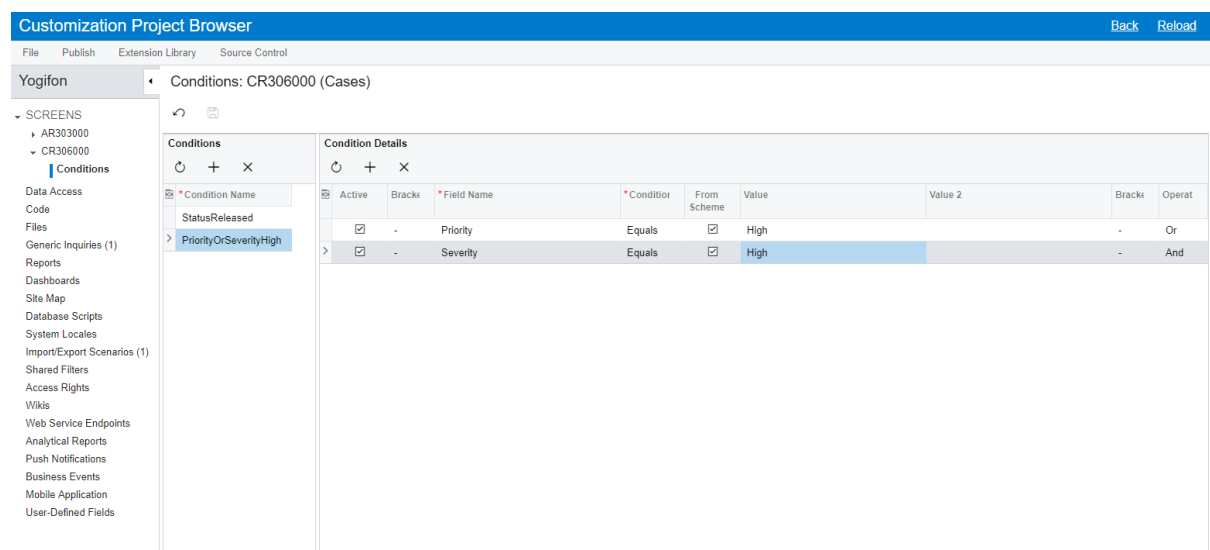


Figure: The PriorityOrSeverityHigh condition

4. In the navigation pane, navigate to **Screens > CR306000**; click **CR306000**.

5. Do the following to specify the condition as a value for the **Required** property of the **Owner** box:

- In the navigation pane, navigate to **Form: Case > Column (second) > Owner**, and click **Owner** (see the following screenshot).
- On the **Main Properties** tab, in the row with the **Required** property, select *PriorityOrSeverityHigh*, as is also shown in the following screenshot.

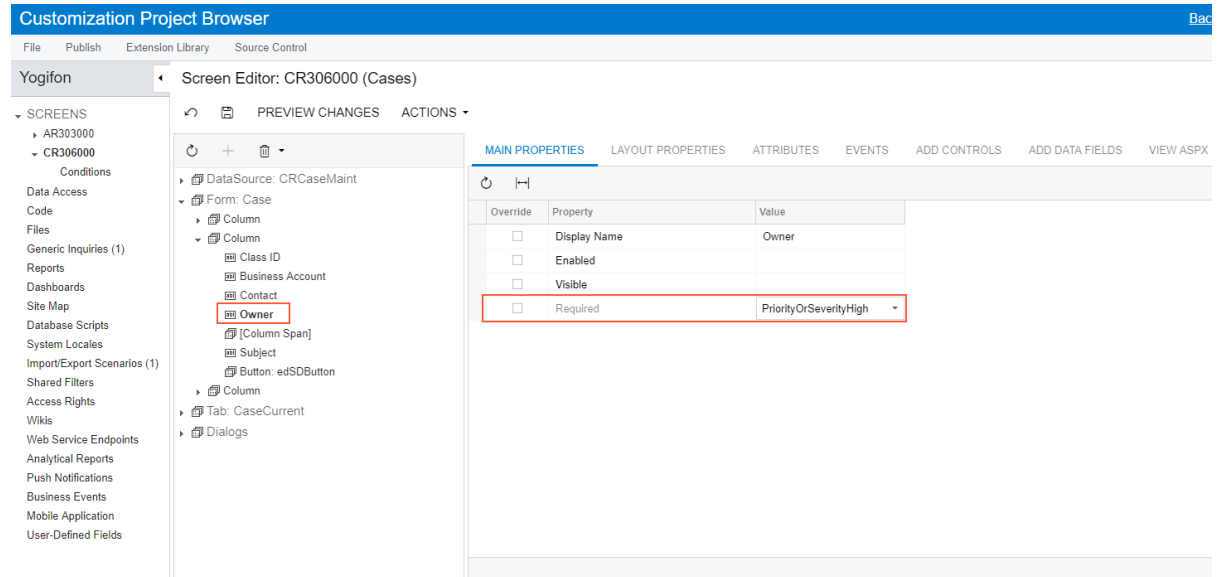


Figure: The Required property value

- Save your changes.

6. Publish the customization project.

Now you can test the condition. Do the following:

- In Acumatica ERP, open the Cases form.
- Open a case with the 000002 ID.
- Clear the **Owner** box.
- In the **Severity** box, select *High*.
- On the form toolbar, click **Save**.

Notice that the record is not saved and an error is displayed for the **Owner** box.

- In the **Severity** box, select *Medium*, and in the **Priority** box, select *High*.
- On the form toolbar, click **Save**.

Notice that the record is again not saved and an error is displayed for the **Owner** box.

- In the **Owner** box, select the owner: *Andrews, Michael*.
- On the form toolbar, click **Save**.

Notice that the error is not displayed and the record is saved.

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.

You will configure a condition by using the Conditions page of the Screen Editor. The resulting condition should look as follows.

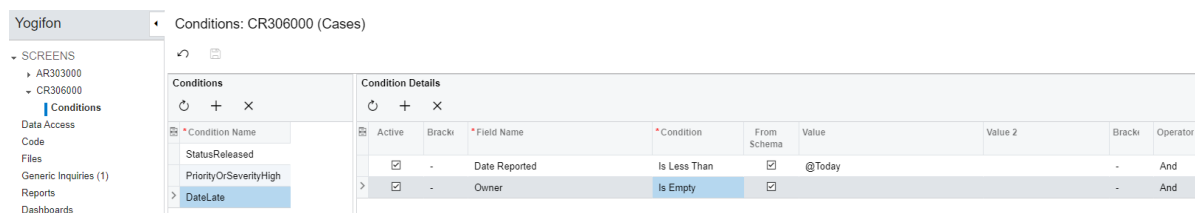


Figure: The resulting condition



In the screenshot, you can see that the value of the `Date Reported` field is compared to `@Today`. This means that the date stored in the `Date Reported` field is compared to the value of the current date set on the server that runs the Acumatica ERP instance. For details on all possible date-relative parameters, see the **Date-Relative Filter Clauses** section of [Creation of Advanced and Ad Hoc Filters](#).

After you have configured the condition, you need to specify it as a value for the **Required** property of the `Owner` field.

Be sure to save your changes and publish the customization project.

To make sure the condition works, on the Cases form, try to create a case, change the business date, and try to save the case. An error is displayed if the **Owner** box is empty.

Lesson Summary

In this lesson, you have learned how to change the properties of UI elements depending on conditions. You have also learned how to configure simple and complex conditions on the Conditions page of the Screen Editor.

Lesson 3.5: Add User-Defined Fields

In [Lesson 3.1: Add a Box to a Form](#), you were adding boxes for fields that were already defined in the instance database. Acumatica ERP also allows you to define *user-defined fields* and add them on a form.

A user-defined field is based on an *attribute*: a property (such as age or industry) that you define in Acumatica ERP so that users can specify additional information for particular entities in the system. Attributes may carry the information about product brand, manufacturer, lead age, gender, or industry.



You can use attributes for only certain entities. For the full list of these entities, see [Attributes](#).

Attributes assigned to an entity are displayed on the **Attributes** tab of the corresponding data entry form. Also, attributes can be added as boxes to an additional tab (the **User-Defined Fields** tab) of a data entry form.

In this lesson, you will define a new attribute, add a user-defined field based on this attribute to the Customer Locations (AR303020) form, and add the user-defined field to the customization project.

Lesson Objectives

As you complete this lesson, you will 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

Step 3.5.1: Define the Attribute

In this step, you will add a new attribute describing the network type of the customer location. Do the following:

1. In Acumatica ERP, open the Attributes (CS205000) form.
2. On the form toolbar, click **Add New Record**.
3. Specify the following settings for the new attribute:
 - **Attribute ID:** `NETTYPE`
 - **Description:** `Network Type`
The description will be used as the name of the element on the **User-Defined Fields** tab of the Customer Locations form.
 - **Control Type:** `Combo`
4. In the table, enter the following details. The values will be available for selection in the **Network Type** combo box.

| Value ID | Description | Sort Order |
|----------|-------------------------------|------------|
| GSM | Global System for Mobile | 1 |
| CDMA | Code Division Multiple Access | 2 |
| LTE | Long-Term Evolution | 3 |
| WiMAX | WiMAX | 4 |

5. Save your changes.

Step 3.5.2: Add the User-Defined Field to a Form

In this step, you add the user-defined field to the Customer Locations (AR303020) form. The field is based on the attribute that you created in the previous step. Do the following:

1. In Acumatica ERP, open the Customer Locations form.



If the form is not available, make sure you enabled the Business Account Locations feature as described in [Course Prerequisites](#).

2. On the form title bar, click **Customization > Manage User-Defined Fields**.

The Edit User Defined Fields (CS205020): Customer Locations form opens, as shown in the following screenshot.

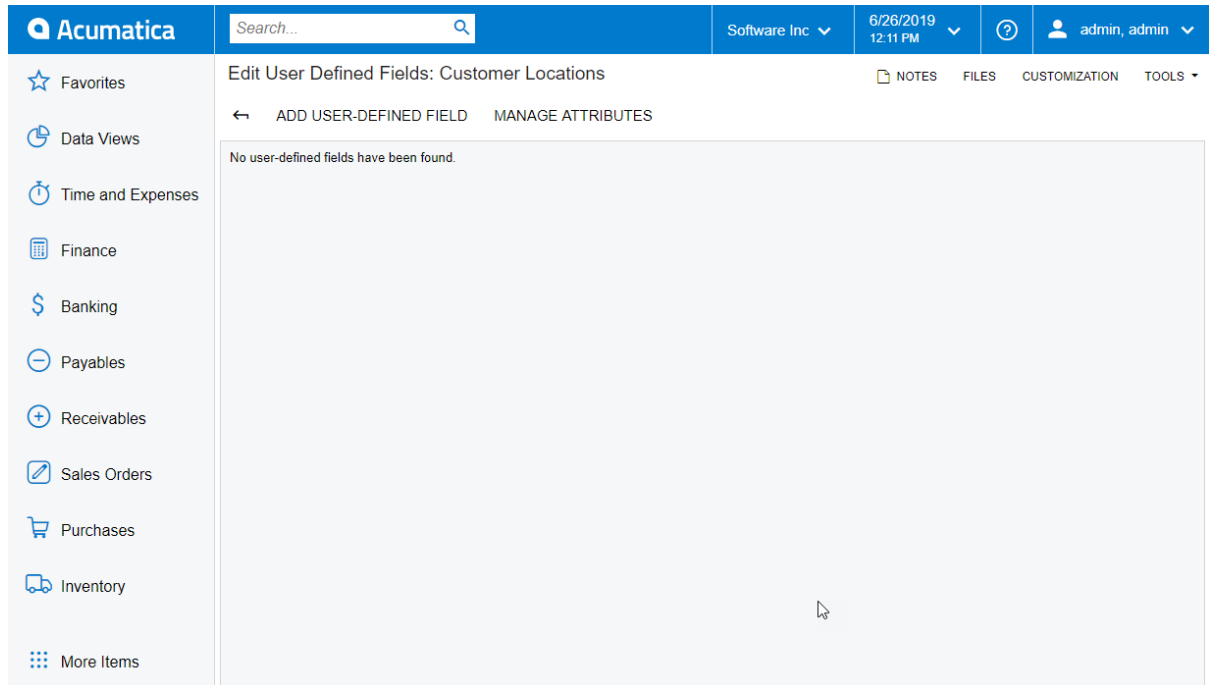


Figure: The Edit User Defined Fields form

3. On the form toolbar, click **Add User-Defined Field**.

The **User-Defined Field Parameters** dialog box opens.

4. In the **Attribute ID** box, select *NETTYPE*, as shown in the following screenshot.

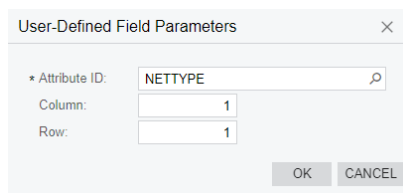


Figure: The User-Defined Field Parameters dialog box

5. Click **OK**.

The dialog box is closed, and the new field (with the specified attribute) appears on the Edit User Defined Fields form.

6. On the form toolbar, click the back arrow button to save your changes and return to the Customer Locations form.

7. In the Summary area of the form, notice the **User-Defined Fields** tab.



On any form for which user-defined fields have been added, the original settings of the record are displayed on the **Document** tab, while the added user-defined fields are displayed on the **User-Defined Fields** tab. You can see these tabs in the screenshot below.

8. On the **User-Defined Fields** tab, notice the new **Network Type** box, which is also shown in the following screenshot.

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:

Phone 2:

Fax:

LOCATION SETTINGS

Tax Registration ID:

Tax Zone: 🔍

Tax Exemption Number:

Entity Usage Type: ▼

Shipping Branch: 🔍

Price Class: 🔍

SHIPPING INSTRUCTIONS

Warehouse: 🔍

Figure: The Network Type box

Step 3.5.3: Test the User-Defined Field

To test the added user-defined field, do the following:

1. In Acumatica ERP, open the Customer Locations (AR3030P1) form.
2. Open the *MAIN* customer location.
3. In the **Network Type** box on the **User-Defined Fields** tab, select *Long-Term Evolution*.
4. On the form toolbar, click **Save**.

Step 3.5.4: Add the User-Defined Field to the Customization Project

In this step, you add the `Network Type` user-defined field to the Yogifon customization project. Do the following:

1. Open the Yogifon project in Customization Project Editor.
2. In the navigation pane, select **User-Defined Fields**.
3. On the form toolbar, click **Add New Record**.
4. In the **Add User-Defined Fields** dialog box, which opens, select the unlabeled check box in the row with the `NETTYPE` attribute ID.

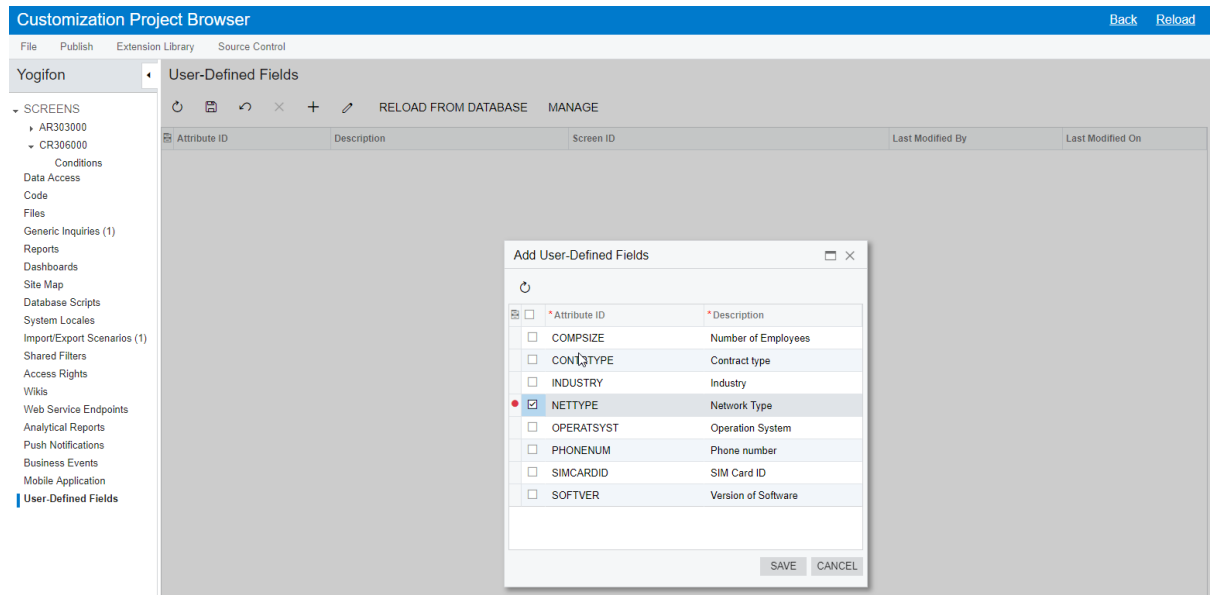


Figure: The Add User-Defined Fields dialog box

5. Click **Save.**

A new row with the settings of the **Network Type** user-defined field (including the associated attribute and the screen ID) appears on the page.

Lesson Summary

In this lesson, you have learned about the use of user-defined fields, and you have added a new user-defined field to a form and to a customization project.

Related Links

[Managing Attributes and User-Defined Fields](#)

Part 4: Managing Customization Projects

In Acumatica ERP, you manage customization projects by means of the Customization Projects (SM204505) form. On this form, you can do any of the following:

- Add a new customization project
- Open a customization project for editing in the Customization Project Editor
- Publish any number of customization projects
- Cancel the publication of any number of customization projects
- Export a customization project as the deployment package
- Import a customization project from an existing deployment package
- Delete any customization project

In this part, you will learn about deploying a customization project to a different environment and publishing multiple customization projects by using the Customization Projects form.

Initial Steps

Before you begin performing the lessons of this part, you need to deploy another instance of Acumatica ERP called *Yogifon_Staging* by using the process described in [Deploying an Acumatica ERP Instance for the Training Course](#). You will use this instance as you deploy a customization project on this instance and publish multiple customization projects on it.

On the *Yogifon_Staging* instance, enable the Business Account Locations feature on the Enable/Disable Features (CS100000) form.

Lesson 4.1: Deploy the Customization Project to a Staging Environment

In this lesson, you will learn how to deploy a customization project to another instance of Acumatica ERP. You will also learn how to create a deployment package of the customization project, export the package to a target system, and apply the customization to that system.

Deployment of the Customization Project to Another Environment

As you perform a customization task, you usually need to use three different sites:

- A development environment: Your local environment, on which you write and debug the customization code
- A production environment: The target environment of the system that must be customized
- A staging (or pre-production) environment: A copy of the production environment in which you will test the solution before applying it to the production environment

You develop customization projects in the development environment. After a customization project is ready, you prepare a deployment package to distribute the customization project to the staging or production environment, as shown in the following diagram.

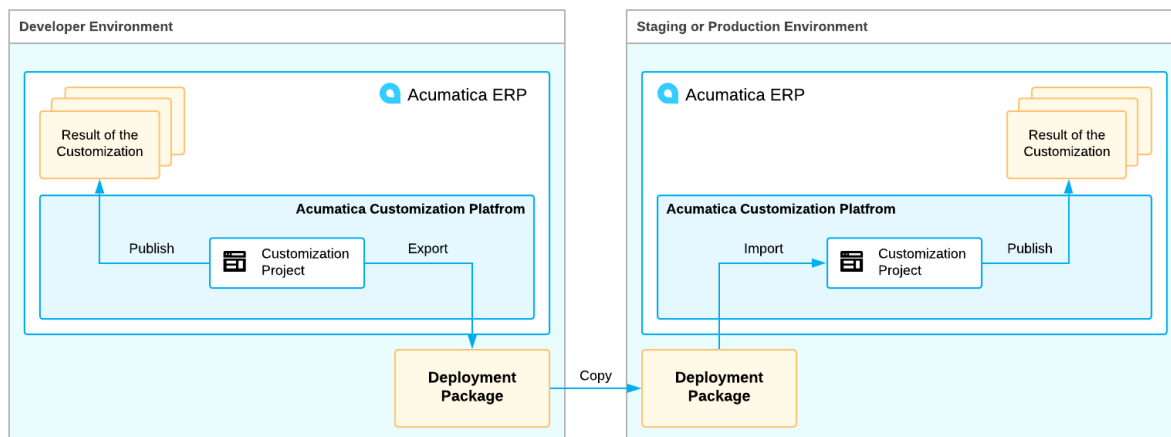


Figure: Deployment of the customization to a target environment



A deployment package of a customization project is a redistributable ZIP file that includes the full content of the project. The deployment package consists of the `project.xml` file with the project XML files and the custom files that you could have added to the project, such as external assemblies. The ZIP file has the same name as the exported customization project does.

Currently, you have the Yogifon customization project created and tested in your development environment. You are sure the project has no issues; therefore, you have decided to test the project on another instance of Acumatica ERP. You have prepared the staging environment (see [Initial Steps](#)) that was created for testing the customization.

Lesson Objectives

As you complete this lesson, you will do the following:

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

Step 4.1.1: Create the Deployment Package

To create the deployment package of the Yogifon customization project, you export the project in the development environment as follows:

1. In Acumatica ERP, open the Customization Projects (SM204505) form.
2. Select the unlabeled check box in the row of the Yogifon project, as shown in the following screenshot.
3. On the form toolbar, click **Export** (also shown in the following screenshot).

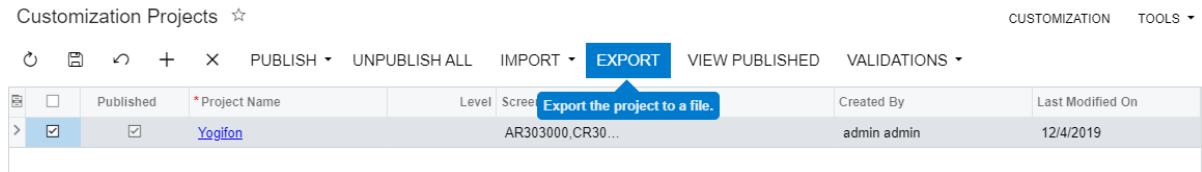


Figure: The Export action being performed for the Yogifon project

The system creates the deployment package of the project and downloads the `Yogifon.zip` file of the package on your computer.

Step 4.1.2: Apply the Customization Project to the Staging Environment

To apply the customization project to the staging environment, you import the customization package to the staging environment and publish the customization project as follows:

1. In Acumatica ERP, open the Customization Projects (SM204505) form.
2. On the form toolbar, click **Import**.
3. In the **Open Package** dialog box, which opens, select the `Yogifon.zip` file, which was generated in the previous step.
4. Click **Upload**.

The system uploads the project and adds it to the list on the Customization Projects form, as shown in the following screenshot.

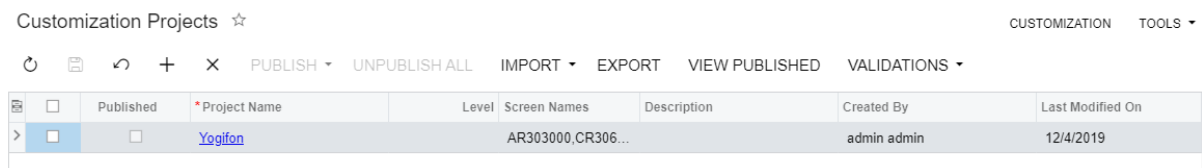


Figure: The Yogifon customization project in the staging environment

5. In the table, select the unlabeled check box in the row with the Yogifon customization project.
6. On the form toolbar, click **Publish**.

The customization is applied to the instance.

Step 4.1.3: Test the Customization (Self-Guided Exercise)

To test the published customization, you will perform the following general steps as part of a self-guided exercise:

- Open the Generic Inquiry (SM208000) form. In the **Inquiry Title** box, select SO-Open by Customer. On the **Results Grid** tab, make sure that the row you added in [Lesson 2.2: Update a Customization Item](#) is present.

- On the Customers (AR303000) form, do the following:
 - Find the **Address Type** box on the **General Settings** tab, and make sure it has the same options that you configured in [Lesson 3.1: Add a Box to a Form](#).
 - Make sure the layout of the **GL Accounts** tab is the one you arranged in [Lesson 3.2: Configure the Layout of a Form](#).
 - On the form toolbar, click **Inquiries > Open SO by Customer**, and make sure the Open Sales Orders by Customer generic inquiry opens in a new tab.
- On the Cases (CR306000) form, do the following:
 - Verify that the conditions you configured in [Lesson 3.4: Configure Conditions](#) work properly.
 - Make sure that the **Network Type** box you added in [Lesson 3.5: Add User-Defined Fields](#) is displayed on the **User-Defined Fields** tab.
- On the Customer Locations (AR303020) form, make sure that, on the **User-Defined Fields** tab, the **Network Type** box is present.

Lesson Summary

In this lesson, you have learned which environments are needed during the resolution of a customization task and what a deployment package is. You have also learned how to export and import a customization project, and how to deploy a customization project from one environment to another.

During the lesson, you have deployed the Yogifon customization project from the development environment to the staging environment for further testing.

Lesson 4.2: Publish Multiple Customization Projects

Different customization tasks may be completed in different customization projects. You can publish multiple customization projects in one instance of Acumatica ERP. For details on when to use multiple customization projects, see [Simultaneous Use of Multiple Customizations](#).

You will start with preparing a new customization project in which you customize the Cases (CR306000) form. After that, you will simultaneously publish the new project and the Yogifon project that you worked on in previous parts of the course.

Lesson Objectives

As a result of completing this lesson, you will do the following:

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

Step 4.2.1: Create a New Project and Customize the Cases Form (Self-Guided Exercise)

In this step, you will create a new customization project as a self-guided exercise. In the customization project, you will customize the Cases (CR306000) form by adding the **Time Spent** box to the Summary area of the form.

First, you will create a customization project named YogifonExtra by using the process described in [Lesson 1.1: Create a Customization Project](#).

Then you will open the Cases form in Screen Editor as described in [Lesson 3.1: Add a Box to a Form](#). You will add the **Time Spent** box below the **Owner** box on the Summary area of the form.

The Cases form should look as shown in the following screenshot when you click **Preview Changes** in the Screen Editor page toolbar.

Screen Title

The screenshot shows the 'Cases' form in the Acumatica ERP Screen Editor. The form is titled 'Screen Title'. At the top, there is a toolbar with 'SAVE & CLOSE', 'undo', 'redo', 'add', 'delete', 'back', 'forward', 'actions', 'inquiries', and 'take case'. Below the toolbar, the form is divided into several sections. On the left, there are fields for 'Case ID' (set to '<NEW>'), 'Date Reported' (6/6/2019 4:33 AM), 'Last Activity Date', 'SLA', and 'Closing Date'. On the right, there are fields for 'Class ID' (PRODSUPINC - Product Support - Inc), 'Business Account', 'Contact', 'Owner', 'Status' (New), 'Reason' (Unassigned), 'Severity' (Medium), and 'Priority' (Medium). In the center, there is a 'Time Spent' field with a value of '0 h 00 m', which is highlighted with a red box. Below the 'Time Spent' field, there is a 'Subject' field. At the bottom, there is a navigation bar with tabs for 'DETAILS', 'ADDITIONAL INFO', 'ATTRIBUTES', 'ACTIVITIES', 'RELATED CASES', and 'RELATIONS'. Below the navigation bar, there is a toolbar with 'VISUAL', 'undo', 'redo', 'Paragraph', 'B', 'I', 'U', 'A', 'color', 'background color', 'list', 'ul', 'ol', 'table', 'insert', 'layout', and 'tables'.

Figure: Preview of the Cases form

Step 4.2.2: Publish the Yogifon Project and the YogifonExtra Project

In this step, you will publish multiple projects as follows:

1. In Acumatica ERP, open the Customization Projects (SM204505) form.
2. In the table, select the check boxes (in the unlabeled column) for the Yogifon and YogifonExtra projects, as shown in the following screenshot.

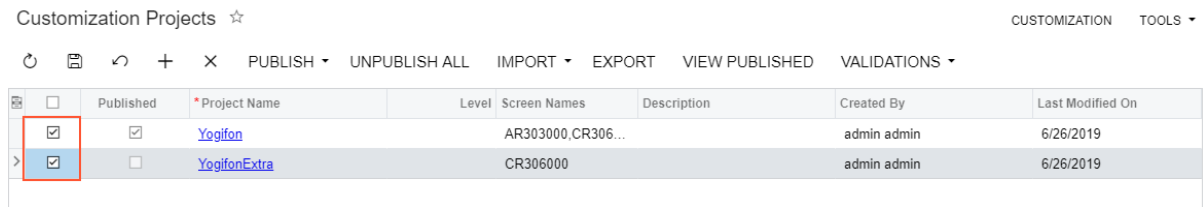


Figure: Selection of projects for publication

- On the form toolbar, click **Publish**.
The **Compilation** pane appears. First, the validation of the projects is performed.
- After the validation has completed, click **Publish** (shown in the following screenshot).

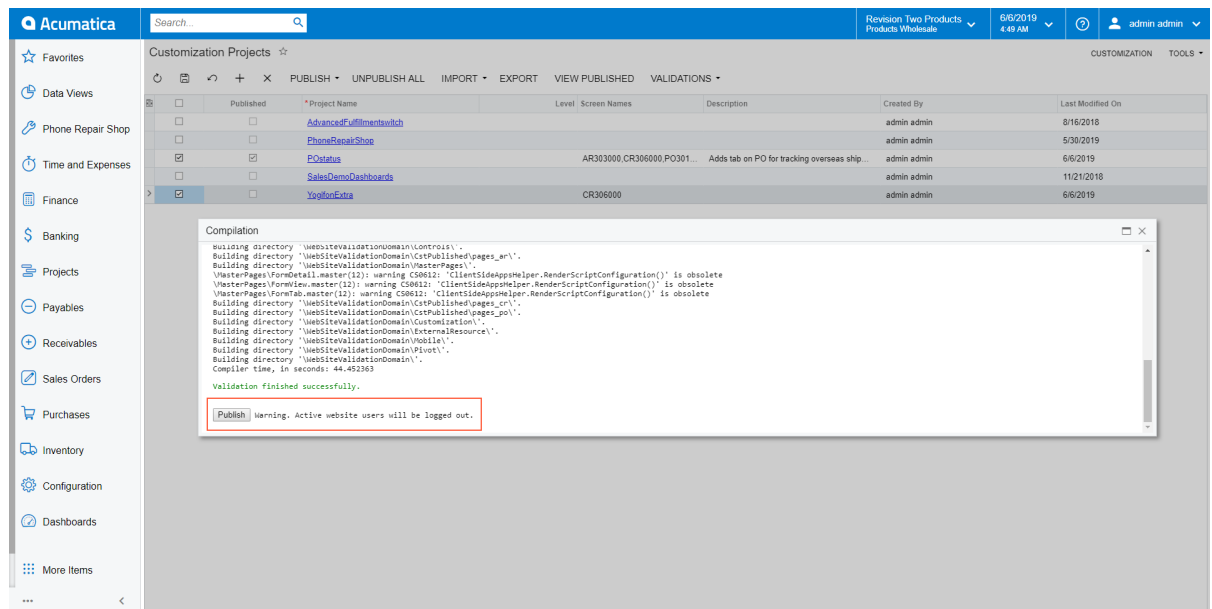


Figure: Selecting Publish in the Compilation pane

When the *Website updated* line appears in the **Compilation** pane, the publication has completed.

- Close the **Compilation** pane.

Step 4.2.3: Test the Cases Form

The *Yogifon* and *YogifonExtra* projects both customized the Cases form. After you have published these projects, make sure the customization is applied correctly:

- In Acumatica ERP, open the Cases (CR306000) form.
- Create a new empty case.
- Make sure that the **Time Spent** box is displayed and that the **View Invoice** action is disabled, as shown in the following screenshot.

Cases

← SAVE & CLOSE [Icons] ACTIONS INQUIRIES TAKE CASE

Case ID: <NEW> * Class ID: PRODSUPINC - Product S

Date Reported: 6/6/2019 5:00 AM * Business Account:

Last Activity Date: * Contact:

SLA: Owner:

Closing Date: Time Spent: 0 h 00 m * Subject:

Reason: New

Severity: Unassigned

Priority: Medium

DETAILS ADDITIONAL INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS

VISUAL [Icons] Paragraph B I U A [Icons] INSERT LAYOUT TABLES

View Invoice

View Service Order

Figure: Verification of the customized Cases form

Lesson Summary

In this lesson, you have created the *YogifonExtra* customization project, in which you have customized the Cases (CR306000) form, published the Yogifon and *YogifonExtra* projects, and tested the customized Cases form.

To publish multiple customization projects, you have done the following:

1. On the Customization Projects (SM204505) form, select the customization projects you want to publish.
2. On the form toolbar, click **Publish**.
3. In the **Compilation** pane, make sure that the validation is completed without errors, and click **Publish**.

Related Links

[To Publish Multiple Projects](#)

Part 5: Customizing the Appearance of the Acumatica ERP Instance

To comply with the Yogifon company style guidelines, you should customize the appearance of the Acumatica ERP instance.

In this part, you will customize the appearance of Acumatica ERP in the following ways:

- Change the logo displayed in the top left corner of each page
- Change the images on the Welcome Page
- Change the color palette of the instance

These actions are performed by using the configuration forms and files of Acumatica ERP. After you set up the appearance of an instance, you can save all related files to a customization project.

Lesson 5.1: Change the Company Logo

A *company logo* is an image displayed in the top left corner of Acumatica ERP. A logo can be different for each company or branch of the instance. The recommended size of the image is 210 by 50 pixels. For details, see the *Changing the Company Logo* section of [Interface Style of Acumatica ERP](#).

In this lesson, you will change a company logo. To complete this lesson, you can use a company logo image file that has been prepared for this course.

Lesson Objectives

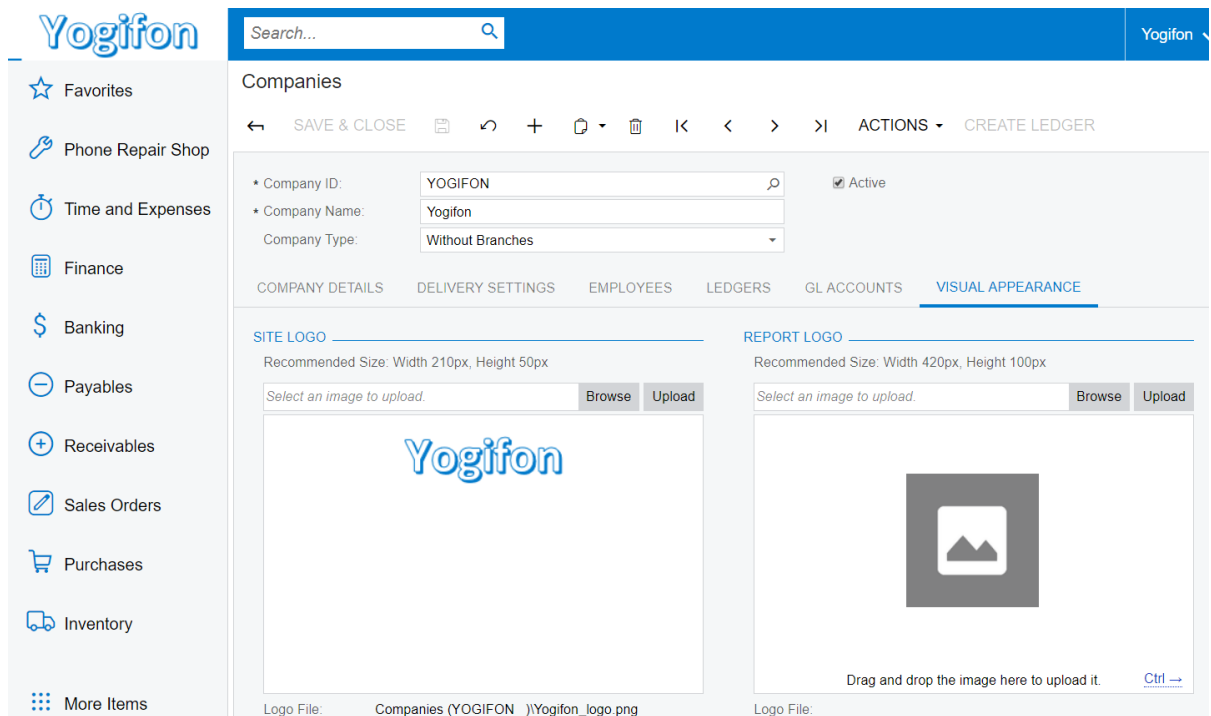
As a result of completing this lesson, you will change the logo of the Yogifon company in Acumatica ERP.

Step: Change the Company Logo

To change the company logo, do the following:

1. In Acumatica ERP, switch to the Yogifon company by selecting it in the company and branch selection menu, on the top pane of the Acumatica ERP screen.
2. Open the Companies (CS1015PL) form.
3. In the **Company ID** column, click the *YOGIFON* link to open the Companies (CS101500) form.
4. In the **Site Logo** section of the **Visual Appearance** tab, click **Browse**.
5. In the dialog box that opens, select the `Yogifon_logo.png` file.
6. In the Site Logo section, click **Upload**.
The new logo appears in the **Site Logo** section.
7. Save your changes.
8. Refresh the page.

The Acumatica ERP screen should look as shown in the following screenshot.



The screenshot shows the 'Companies' form in the Acumatica ERP system. The 'Visual Appearance' tab is selected, displaying two logo upload sections: 'SITE LOGO' and 'REPORT LOGO'. The 'SITE LOGO' section shows the current logo, 'Yogifon', with a recommended size of Width 210px, Height 50px. The 'REPORT LOGO' section shows a placeholder for a new logo, with a recommended size of Width 420px, Height 100px. Both sections have 'Browse' and 'Upload' buttons. The 'Logo File' path for the site logo is 'Companies (YOGIFON)\Yogifon_logo.png'.

Figure: The new logo on the screen



If the logo is not updated, make sure you selected the Yogifon company in the tree selector as described in [Deploying an Acumatica ERP Instance for the Training Course](#).

Lesson Summary

In this lesson, you have learned how to change a company logo.

Related Links

[Interface Style of Acumatica ERP](#)

Lesson 5.2: Change Images on the Welcome Page

In this lesson, you will change the images displayed on the left side of the Welcome page. The system displays an image from a set of images stored in the `Icons` folder of the instance. Each of these images has the name `login_bgX.jpg`, where `X` is the index number of the image.

Lesson Objectives

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

Step: Replace the Images Displayed on the Welcome Page

To replace the images displayed on the Welcome page, do the following:

1. In the instance folder, navigate to the `Icons` folder.
2. Delete the files from `login_bg1.jpg` to `login_bg18.jpg` that are located in the folder.
3. Copy the `login_bg1.jpg`, `login_bg2.jpg`, and `login_bg3.jpg` files from the `FilesForTraining` folder (which was provided with the course) to the `Icons` folder.
4. Open the Welcome page of the Yogifon instance.

Notice that the image has changed, as shown in the following screenshot.



Figure: The Welcome page with an updated image

Lesson Summary

In this lesson, you have learned how to replace a set of images displayed on the Welcome page.

Related Links

[Interface Style of Acumatica ERP](#)

Lesson 5.3: Customize the Color Theme

You can change the color theme of Acumatica ERP by using one of the following ways:

- Change the primary color of the default theme on the Site Preferences (SM200505) form. All colors of the theme are calculated based on the primary color.
- Create a new theme and modify the CSS file that defines the theme. This approach also gives you the ability to change the primary color, but for the selected theme only.

Lesson 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

Example 5.3.1: Change Primary Color

To change the primary color by using the Site Preferences (SM200505) form, do the following:

1. In Acumatica ERP, open the Site Preferences form.
2. In the **Primary Color** box of the **General Defaults** section, enter the #008000 color.
3. On the form toolbar, click **Save**.

The color used on the form should change and look as shown in the following screenshot.

The screenshot displays the 'Site Preferences' form in the Acumatica ERP system. The left sidebar shows the 'Yogifon' logo and a list of navigation items: Favorites, Data Views, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, and More Items. The main content area is titled 'Site Preferences' and includes a search bar and tabs for NOTES, FILES, CUSTOMIZATION, and TOOLS. The 'GENERAL DEFAULTS' section is active, showing fields for Home Page, Help On Help, Map Viewer (set to Google), Login Time Zone, and Interface Theme (set to Default). A 'RESET TO DEFAULT COLORS' button is visible. The 'Primary Color' field is highlighted with a green background and shows the hex code #008000. Below this, the 'MENU USAGE HISTORY SETTINGS' section shows 'Usage History for Search Optimization' with radio buttons for 'Number of Days to Keep Menu Usage History' (set to 90) and 'Never Delete Menu Usage History'. The 'EDITOR SETTINGS' section shows 'Editor Font' set to Arial and size 2, with a 'Spell Check' checkbox. The 'EXPORT TO EXCEL' section has a 'Draw Border' checkbox.

Figure: The Site Preferences form after the primary color change



The **Primary Color** box is available only if the *Default* color theme is selected in the **Interface Theme** box.

Example 5.3.2: Create and Configure a New Color Theme

In this example, you will create a new theme and configure the colors of this theme.

1. Create a Custom Theme Folder

The list of themes for the instance is determined by the names of folders located in the `App_Themes` folder. So to create a custom theme and define its name, you create a new folder. Do the following:

1. Navigate to the `App_Themes` folder of the `Yogifon` instance folder.
2. Copy the `Default` folder and paste it in the same location under the name `YogifonTheme`.

2. Update the `00_Controls.css` File

The color theme of the Acumatica ERP instance is determined by the `00_Controls.css` file stored in the theme folder. In this file, color variables are defined. Depending on the values of these variables, all colors of the theme are calculated. To change the values of variable in the `00_Controls.css` file, do the following:

1. Open the `App_Themes\YofigonTheme\00_Controls.css` file.
2. In the file, find the following JSON lines:

```
"variableName": "--primary-color",
"displayName": "Primary Color",
"enabled": true,
"defaultValue": "#007ACC",
```

The code above defines the `--primary-color` variable, which determines the primary color of the theme.

3. Set the `defaultValue` field value to `#cc00a3`.
4. Find the following JSON lines.

```
"variableName": "--background-color",
"displayName": "Background Color",
"enabled": false,
"defaultValue": "#F5F7F8"
```

The code above defines the `--background-color` variable, which determines the background color of the instance pages.

5. Set the `defaultValue` field to `#ffdefe`.
6. Save the file.

3. Select the New Theme for the Instance

Now that you have created a new theme, you select it for the new instance by doing the following:

1. In Acumatica ERP, open the Site Preferences (SM200505) form.
2. In the **Interface Theme** box of the **General Defaults** section, select `YogifonTheme`.
3. On the form toolbar, click **Save**.

The form should look as shown in the following screenshot.

The screenshot shows the 'Yogifon' application interface. On the left is a navigation pane with icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, and More Items. The main area is titled 'Site Preferences' and contains several sections:

- GENERAL DEFAULTS**: Includes fields for Home Page, Help On Help, Map Viewer (set to Google), Login Time Zone, and Interface Theme (set to YogifonTheme). There is a checkbox for 'Show Tooltips for Table Toolbar Buttons' which is checked.
- RESET TO DEFAULT COLORS**: A button to reset colors.
- Primary Color**: A color picker set to a dark blue color with the hex code #cc00a3.
- Template for External Links**: A text field.
- Portal External Access Link**: A text field.
- Display Name Order**: A dropdown menu set to 'Eastern Modified'.
- MENU USAGE HISTORY SETTINGS**: Includes a section for 'Usage History for Search Optimization' with two radio buttons: 'Number of Days to Keep Menu Usage History' (set to 90) and 'Never Delete Menu Usage History'.
- EDITOR SETTINGS**: Includes a dropdown for 'Editor Font' (set to Arial) and a dropdown for font size (set to 2). There is a checkbox for 'Spell Check' which is unchecked.
- EXPORT TO EXCEL**: A checkbox for 'Draw Border' which is unchecked.

Figure: The Site Preferences form with the new theme applied

4. Save the New Theme to the Customization Project

In the previous sections, you customized the instance of Acumatica ERP outside of the Customization Project Editor. Such customization cannot be applied by publishing a customization project. However, you can save all of the files that define a color theme in the customization project so that all these items are stored in one place. When you want to apply the customization to another instance, you can download these files from the customization project and repeat all instructions described above. You can save the new *YogifonTheme* color theme to the customization project.

To include these files in the customization project, do the following:

1. Open the Yogifon customization project in Customization Project Editor.
2. In the navigation pane, select **Files**.
The Custom Files page opens.
3. On the page toolbar, click **Add New Record**.
The **Add Files** dialog box opens. The dialog box displays all files modified or added in the instance folder.
4. In the dialog box, select all files located in the `App-Themes\YogifonTheme` folder.
5. Click **Save** to save files in the customization project and close the dialog box.
The files appear on the Custom Files page, as shown in the following screenshot.

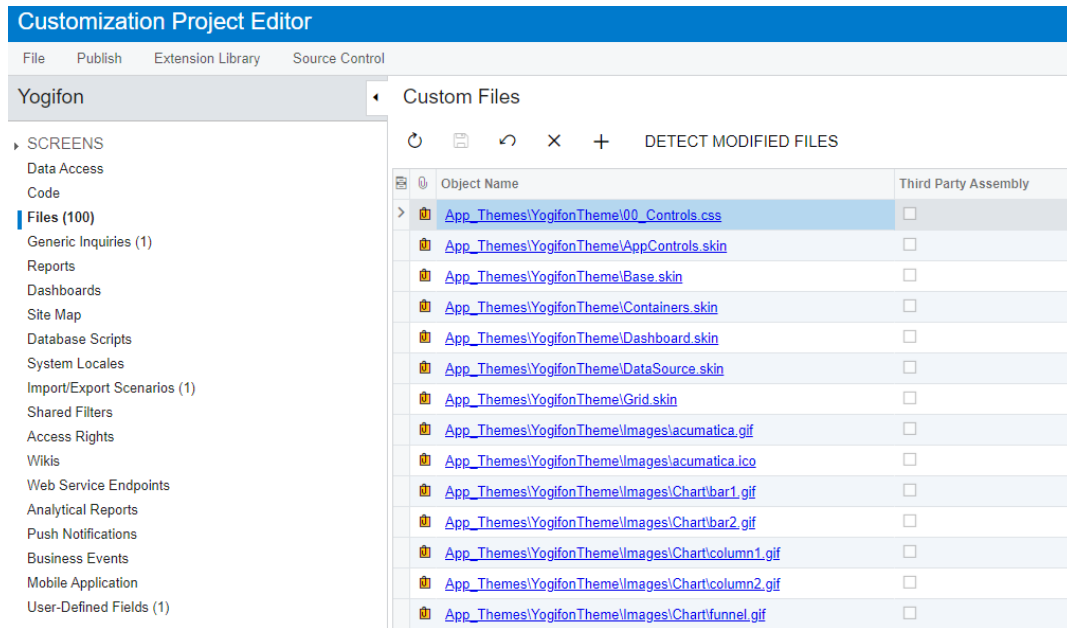


Figure: The Custom Files page

6. On the page toolbar, click **Save**.

5. Return to the Default Theme

To restore color theme that is provided with Acumatica ERP by default, do the following:

1. In Acumatica ERP, open the Site Preferences (SM200505) form.
2. In the **Interface Theme** box, select *Default*.

The Primary Color box is changed to the color you specified in [Example 5.3.1: Change Primary Color](#).

3. Next to the **Interface Theme** box, click **Reset to Default Colors**.
4. On the form toolbar, click **Save**.

The color theme is changed.

Lesson Summary

In this lesson, you have learned how to customize the color theme of Acumatica ERP by using the Site Preferences (SM200505) form and by creating a custom theme in the `App_Themes` folder of the instance. You have saved the created color theme to the *Yogifon* customization project.

Lesson 5.4: Configure a Workspace

In Acumatica ERP, a workspace is a menu (which can be accessed from a link on the main menu of the user interface) that contains links to the forms and reports of a particular area of the product.

For quick access to some of the forms most frequently used by the Yogifon employees, you need to create a new workspace and add links to it.


Lesson 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

Step 5.4.1: Add the Workspace

To create the new workspace, do the following:

1. On the main menu of Acumatica ERP (lower left), click the configuration menu button (), and then click **Edit Menu** to switch to Menu Editing mode.
2. On the top toolbar (top left), click **Add Workspace**.
3. In the **Workspace Parameters** dialog box, specify the following settings:
 - **Icon:** *phone_iphone*
 - **Area:** *Other*
 - **Title:** *Yogifon*
4. Click **OK** to save your changes and close the dialog box.

The Menu Editing mode with the new workspace looks as follows.

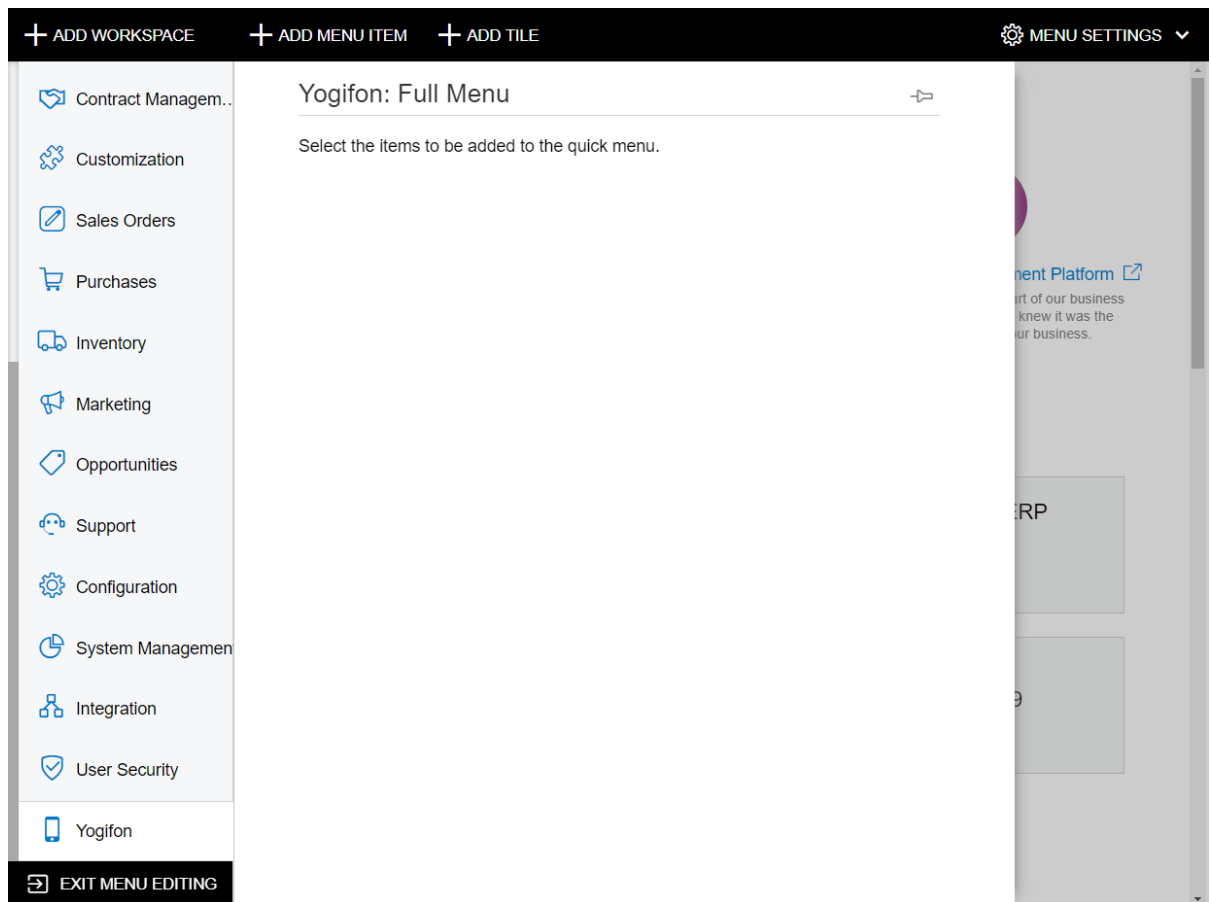


Figure: The Yogifon workspace in Menu Editing mode

Step 5.4.2: Add Links to the Workspace

After you have created the **Yogifon** workspace, you can add to it links to the Customers (AR303000) and Cases (CR306000) forms.

To add links to the **Yogifon** workspace, do the following:

1. In the Menu Editing mode of Acumatica ERP, on the main menu, click **Yogifon**.
2. On the top toolbar, click **Add Menu Item**.
3. In the **Select Forms** dialog box, select the **Customers** item, as shown in the following screenshot.

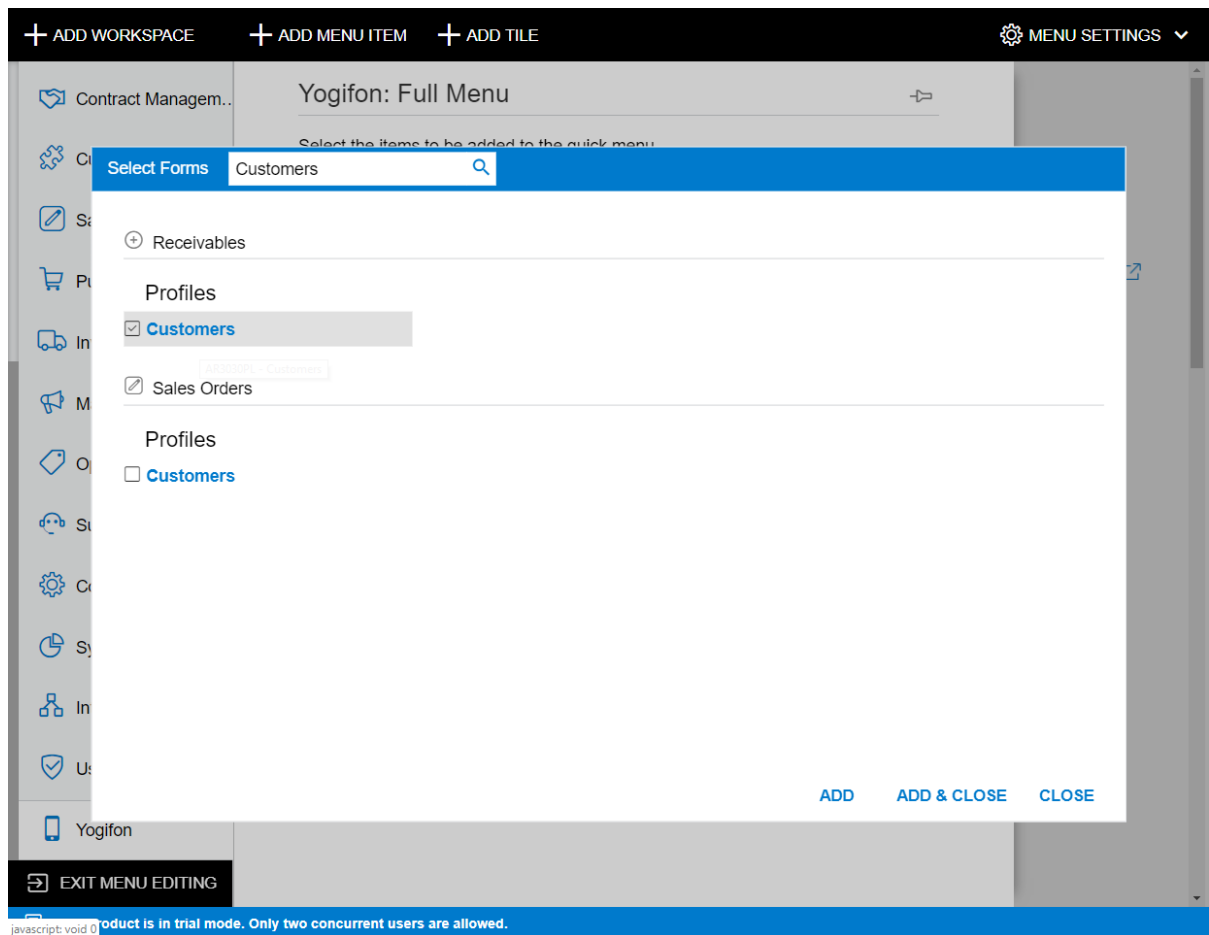


Figure: The Select Forms dialog box

4. Click **Add** to add the form.
5. Repeat the previous two instructions for the Cases form.
6. Click **Add & Close**.
7. In the bottom left corner of the screen, click **Exit Menu Editing** to save your changes and exit the Menu Editing mode.
8. Make sure the workspace is configured properly. In the main menu of Acumatica ERP, find the **Yogifon** workspace and select it.

The **Yogifon** workspace should look as shown in the following screenshot.

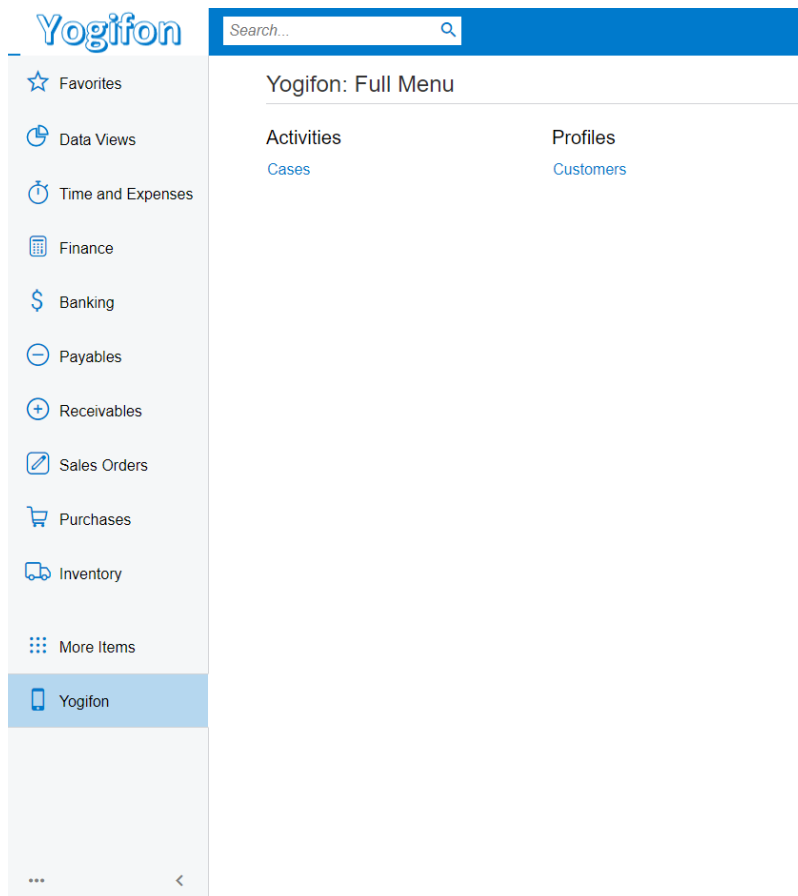


Figure: The Yogifon workspace

Lesson Summary

In this lesson, you have learned how to add a new workspace and add links to a workspace.

Related Links

[To Add and Configure a Workspace](#)

Course Summary

In this course, you have learned how to perform customization tasks within Acumatica ERP. For the completion of these tasks, you learned how to use the following customization tools provided by Acumatica Customization Platform:

- Customization Project Editor and Screen Editor
- Element Inspector

You have learned how to do the following types of customization activity:

- Performing the customization of existing forms of Acumatica ERP in the following ways:
 - Adding new fields
 - Modifying the properties of existing fields
 - Configuring the layout of existing controls
 - Adding the actions to the form toolbar
 - Configuring conditions for the properties of field or actions
- Packaging related content (customization items) into the customization project
- Managing customization projects and items within a customization project
- Deploying a customization project to another system
- Publishing multiple customization projects
- Changing the visual appearance of Acumatica ERP