



System Maintenance

David Harris

Product Support Team Lead

Timing and Agenda

November 21, 2022 -10:00-11:30 AM

Day 1

Lesson 1.1: Tailoring the User Interface

Lesson 1.2: Using Company Logos

Lesson 1.3: Modifying the Color Theme

November 22, 2022 -10:00-11:30 AM

Day 2

Lesson 2.1: Managing Tenants by Using the Web Interface

Lesson 2.2: Working with Snapshots

Lesson 2.3: Scheduling Automated Processing

Timing and Agenda

November 23, 2022 -10:00-11:30 AM

Day 3

Lesson 2.4: Publishing Customization Projects

Lesson 3.1: Monitoring System Health

Lesson 3.2: Maintaining Database by Using the Web Interface

Lesson 3.3: Building Search Indexes

Lesson 3.4: Updating Acumatica ERP by Using the Web Interface

Day 1



Part 1: Tailoring the Appearance of the Acumatica ERP Instance

Lesson 1.1: Tailoring the User Interface

Learning Objectives

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

- Modify the set of workspace menu items on the main menu by using Menu Editing mode
- Modify the contents of a workspace by using Menu Editing mode
- Change a form location on the main menu by modifying the system site map

Figure: The system in Menu Editing mode

The screenshot displays the Acumatica system interface in Menu Editing mode. The top navigation bar includes options for '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. The left sidebar lists various system modules, with 'Finance' highlighted in blue. The main content area is titled 'Journal Transactions' and features a table of transaction records. The table columns include Module, Batch Number, Status, Ledger, Transaction Date, Post Period, and Description. The records show a series of 'Posted' transactions from the 'AP' module, spanning from 2020 to 2021. At the bottom, a status bar indicates '1-12 of 369 records' and '1 of 31 pages'. A blue banner at the very bottom states: 'Your product is in trial mode. Only two concurrent users are allowed.'

Module	Batch Number	Status	Ledger	Transaction Date	Post Period	Desc
AP	AP000001	Posted	ACTUAL	12/11/2020	12-2020	Log
AP	AP000002	Posted	ACTUAL	12/3/2020	12-2020	X-M
AP	AP000003	Posted	ACTUAL	12/15/2020	12-2020	Log
AP	AP000004	Posted	ACTUAL	1/10/2021	01-2021	Adv
AP	AP000005	Posted	ACTUAL	1/8/2021	01-2021	Pur
AP	AP000006	Posted	ACTUAL	1/11/2021	01-2021	Pur
AP	AP000007	Posted	ACTUAL	1/17/2021	01-2021	Pur
AP	AP000008	Posted	ACTUAL	1/8/2021	01-2021	Jar
AP	AP000009	Posted	ACTUAL	1/8/2021	01-2021	Gla
AP	AP000010	Posted	ACTUAL	1/9/2021	01-2021	Cor
AP	AP000011	Posted	ACTUAL	1/10/2021	01-2021	Cor
AP	AP000012	Posted	ACTUAL	1/18/2021	01-2021	Lab

Figure: The Workspace Parameters dialog box

The screenshot displays the Acumatica workspace editor interface. At the top, there are navigation options: '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. The main area is titled 'Banking' and contains several action buttons: 'New Cash Entry', 'New Transfer', 'New Deposit', and 'Process Bank Records'. Below these buttons, a prompt reads 'Select the items to be added to the quick menu.' A 'Workspace Parameters' dialog box is open, allowing configuration for a menu item. The dialog has a blue header and contains the following fields:

- Icon: \$ account_balance
- Area: Financials
- Title: Banking

At the bottom of the dialog are 'OK' and 'CANCEL' buttons. The background workspace shows a sidebar with categories like 'Data Views', 'Bills of Material', 'Product Configurator', 'Time and Expenses', 'Finance', 'Banking', 'Construction', 'Project Management', 'Compliance', and 'Currency Manage...'. The 'Banking' category is selected. Below the dialog, there are sections for 'Credit Card Processing' (with options like 'Generate Payments', 'Capture Payments', 'Card Payments Pending Review') and 'Reports' (with options like 'Cash Account Summary', 'Cash Account Details', 'Reconciliation Statement'). A 'Show Less' button is visible at the bottom right of the workspace. At the very bottom of the screen, a blue banner states: 'Your product is in trial mode. Only two concurrent users are allowed.'

Figure: The deletion of a workspace from the main menu

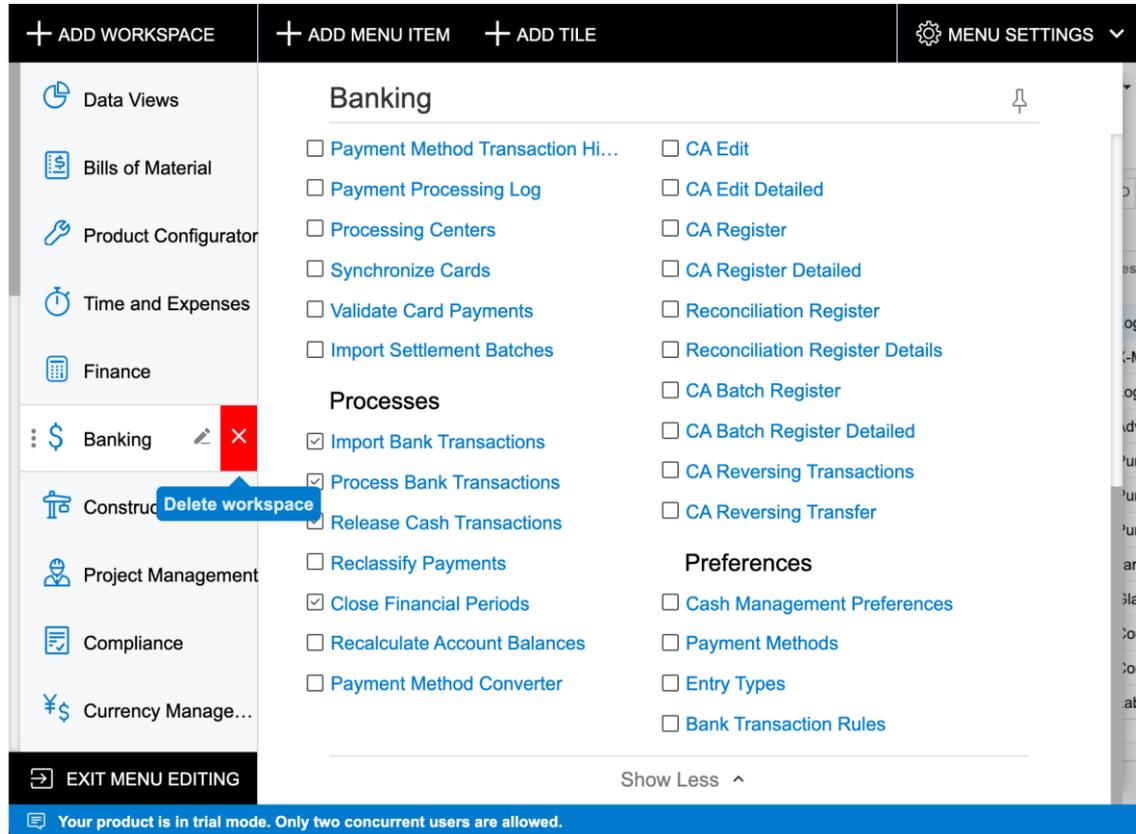


Figure: The changing of the Construction workspace location

The screenshot displays the Acumatica software interface during a workspace configuration session. The top navigation bar includes options for '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. The left sidebar shows a list of modules, with 'Construction' highlighted and expanded. The main workspace area is titled 'Construction' and features four quick action tiles: 'New Project Transaction', 'New Project', 'New Project Task', and 'New Change Order'. Below these tiles, there is a section for selecting items to be added to the quick menu, followed by three columns of items with checkboxes: 'Transactions' (Project Transactions, Change Orders, Pro Forma Invoices, Project Quotes, Subcontracts), 'Reports' (Project Balance, Project Profitability, Projects, Project Tasks, Employee Hours, Employee Hours by Project and ..., Project Billing, Project Transaction Register, Project Cost Transaction History, Project Budget Forecast by Month, Subcontract Summary), and 'Profiles' (Projects, Project Tasks, Rate Tables, Labor Cost Rates, Project Budget, Cost Projections). A 'Show All' dropdown is located at the bottom right of the main area. A trial mode notice is visible at the bottom of the screen.

Figure: The addition of a custom workspace

The screenshot displays the Acumatica software interface for configuring a custom workspace. The top navigation bar includes options for '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. The main workspace is titled 'Payables' and contains several action buttons: 'New Bill', 'New Payment', 'Vendor Details', and 'New Vendor'. A dialog box titled 'Workspace Parameters' is open, prompting the user to 'Select the items to be added to the quick menu.' The dialog includes three input fields: 'Icon:' (a dropdown menu), 'Area:' (a dropdown menu), and 'Title:' (a text input field). Below these fields are 'OK' and 'CANCEL' buttons. The background workspace shows a list of menu items with checkboxes, including 'Vendors', 'Vendor Locations', 'Non-Stock Items', 'Credit Terms', 'Vendor Prices', 'AP Aged Period Sensitive', 'Cash Requirements', 'Bills Pending Approval', and 'Bills Pending Payment'. A trial mode banner at the bottom states: 'Your product is in trial mode. Only two concurrent users are allowed.'

Figure: The creation of a new tile

The screenshot displays the Acumatica menu editor interface. At the top, there are three main actions: '+ ADD WORKSPACE', '+ ADD MENU ITEM', and '+ ADD TILE' (which is highlighted with a red box). On the right, there is a 'MENU SETTINGS' dropdown. The main area shows a 'Banking' menu with a list of items, each with a checkbox. A modal dialog titled 'Tile Parameters' is open, allowing the user to configure a new tile. The dialog contains the following fields:

- Icon:** A dropdown menu with 'pen_frame' selected.
- Title:** A text input field containing 'New Cash Entry'.
- Form:** A dropdown menu with 'CA304000 - Transactions' selected.
- Parameters:** A text input field for optional URL parameters, with a link to 'examples' below it.

At the bottom of the dialog are 'OK' and 'CANCEL' buttons. The background menu items include 'Cash Accounts', 'Corporate Cards', 'Printed Forms', and 'Deposit Slip'. A blue banner at the bottom of the screen reads: 'Your product is in trial mode. Only two concurrent users are allowed.'

Figure: The correspondence of form UI elements with the URL parameters

ScreenId=AP402000&VendorID=ALLFRUITS+&ShowAllDocs=True

SweetLife Fruits & Jams
SweetLife Head Office and Wh...

Vendor Details

Company/Branch: HEADOFFICE - SweetLife Head ...

* Vendor: ALLFRUITS - All Fruits Mall

Period: []

AP Account: []

Show All Documents

Include Unreleased Documents

Balance by Documents: 1,139.10

Current Balance: 1,139.10

Prepayment Balance: 0.00

Balance Discrepancy: 0.00

Retained Balance: 0.00

		* Branch	Type	* Reference Nbr.	* Date	* Post Period	Status	Origin Amount	Balance	Cash Discount Taken
>		HEADOFFICE	Bill	000049	2/20/2021	02-2021	Open	1,139.10	1,139.10	0.00
		HEADOFFICE	Bill	000037	1/30/2021	01-2021	Closed	200.00	0.00	0.00
		HEADOFFICE	Check	000023	1/30/2021	01-2021	Closed	-200.00	0.00	0.00
		HEADOFFICE	Bill	000028	1/22/2021	01-2021	Closed	114.50	0.00	0.00
		HEADOFFICE	Check	000018	1/22/2021	01-2021	Closed	-114.50	0.00	0.00
		HEADOFFICE	Bill	000027	1/15/2021	01-2021	Closed	525.00	0.00	0.00
		HEADOFFICE	Check	000017	1/15/2021	01-2021	Closed	-525.00	0.00	0.00
		HEADOFFICE	Bill	000025	1/8/2021	01-2021	Closed	690.24	0.00	0.00

Your product is in trial mode. Only two concurrent users are allowed. ACTIVATE

Figure: The inspection of a form element

The screenshot displays the SweetLife ERP interface. The browser address bar shows the URL: `ScreenId=AP301000&DocType=INV&RefNbr=000060`. The application header includes the SweetLife logo, a search bar, and user information for Kimberly Gibbs. The main content area shows a 'Bills and Adjustments' section for 'Bill 000060 - All Fruits Mall'. A 'REMOVE HOLD' button is visible. The 'Vendor' field is highlighted with a red box, and an 'Element Properties' dialog box is open over it. The dialog box shows the following details:

- Control Type: Segment Mask
- Data Class: [APInvoice](#)
- Data Field: **VendorID** (highlighted with a red box)
- View Name: Document
- Business Logic: APInvoiceEntry

At the bottom of the dialog box, there are buttons for 'CUSTOMIZE', 'ACTIONS', and 'CANCEL'. The background interface shows various navigation options and a trial mode notice at the bottom: 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

Figure: The specification of parameters for a tile

Tile Parameters

Icon:

\$ account_balance ▾

Title:

Fruit Mall Vendor Details

Form:

AP402000 - Vendor Details ▾

Add optional URL parameters to apply to the selected form (see [examples](#)).

Parameters:

VendorID=ALLFRUITS+&ShowAllDocs=

OK

CANCEL

Figure: The deletion of a tile from a workspace

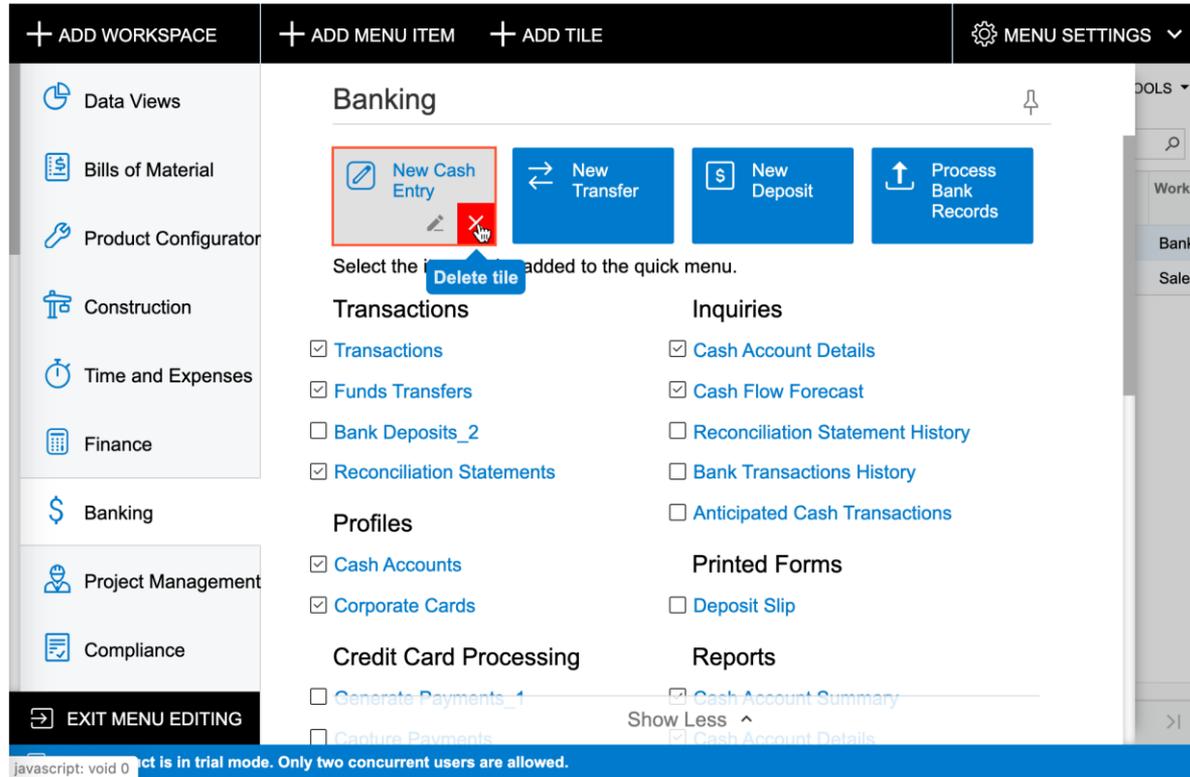


Figure: The selection of a check box for adding the link to the quick menu

The screenshot displays the 'Banking' menu settings in Acumatica. The interface includes a top navigation bar with options: '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. A left sidebar lists various menu categories such as 'Data Views', 'Bills of Material', 'Product Configuration', 'Construction', 'Time and Expenses', 'Finance', 'Banking', 'Project Management', and 'Compliance'. The main content area is titled 'Banking' and features four action tiles: 'New Cash Entry', 'New Transfer', 'New Deposit', and 'Process Bank Records'. Below these tiles, a prompt reads 'Select the items to be added to the quick menu.' The items are organized into several sections: 'Transactions' (with checkboxes for Transactions, Funds Transfers, and Bank Deposits), 'Inquiries' (with checkboxes for Cash Account Details, Cash Flow Forecast, Reconciliation Statement History, Bank Transactions History, and Anticipated Cash Transactions), 'Profiles' (with checkboxes for Cash Accounts and Corporate Cards), 'Printed Forms' (with a checkbox for Deposit Slip), and 'Reports' (with checkboxes for Generate Payments, Capture Payments, Cash Account Summary, and Cash Account Details). The 'Bank Deposits' checkbox is highlighted with a red box, and a mouse cursor is shown clicking it. At the bottom of the interface, a blue banner contains the text: 'Product is in trial mode. Only two concurrent users are allowed.'

Figure: The removal of a link to a form from a workspace

The screenshot shows the 'Banking' workspace configuration interface. At the top, there are buttons for '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. The main area displays a 'Banking' workspace with a quick menu containing four tiles: 'New Cash Entry', 'New Transfer', 'New Deposit', and 'Process Bank Records'. Below the quick menu, there is a section for selecting items to be added to the quick menu, with the instruction 'Select the items to be added to the quick menu.' The items are organized into categories: Transactions, Inquiries, Profiles, and Credit Card Processing. The 'Bank Deposits' item under the Transactions category is highlighted with a red border, and a red 'X' icon is visible over its edit icon, with a 'Delete link' tooltip appearing. Other items include 'Transactions', 'Funds Transfers', 'Reconciliation Statements', 'Cash Accounts', 'Corporate Cards', 'Cash Account Details', 'Cash Flow Forecast', 'Reconciliation Statement History', 'Bank Transactions History', 'Anticipated Cash Transactions', 'Deposit Slip', 'Generate Payments', 'Capture Payments', 'Cash Account Summary', and 'Cash Account Details'. A 'Show Less' button is also present. At the bottom left, there is an 'EXIT MENU EDITING' button. A blue banner at the bottom of the screen contains the text: 'javascript: void 0 ... is in trial mode. Only two concurrent users are allowed.'

Figure: The addition of a link to the form to a workspace

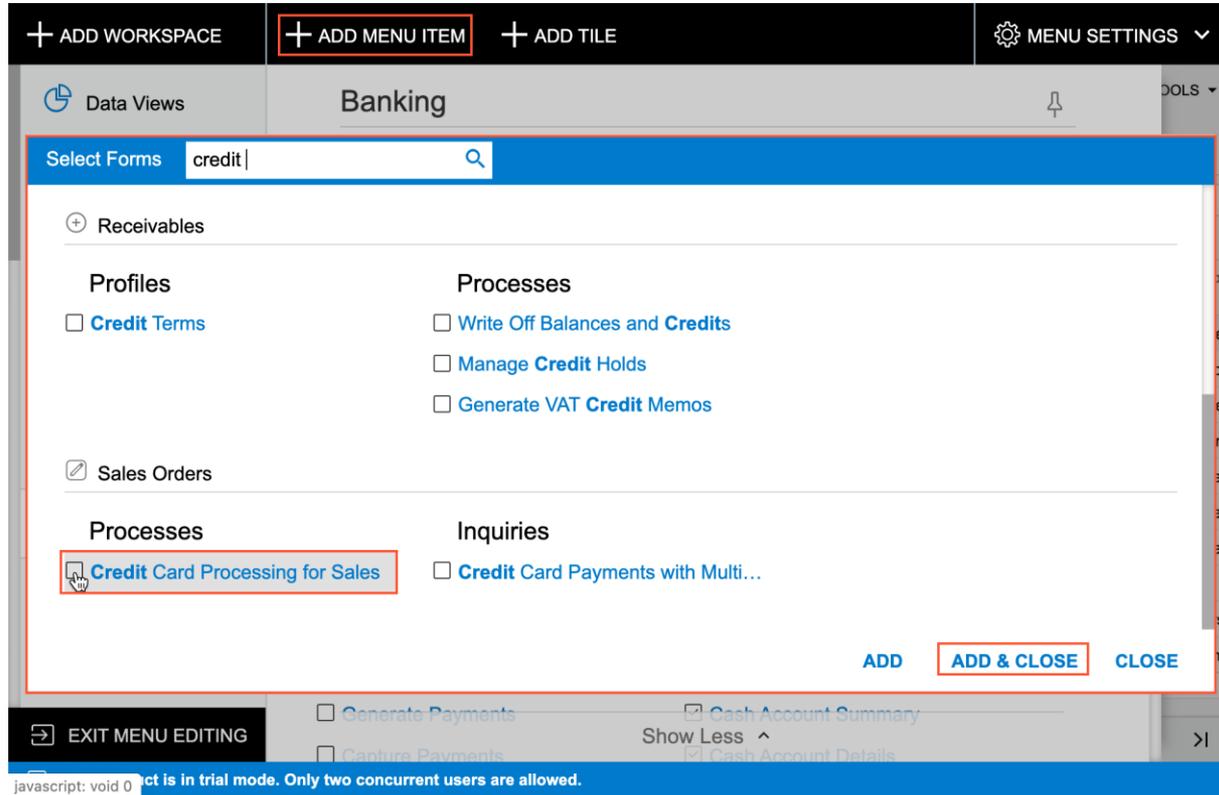


Figure: The addition of a new category

The screenshot displays the 'Workspace Categories' configuration page in Acumatica. The page title is 'WORKSPACE CATEGORIES' and it includes a 'RESET TO DEFAULT MENU SETTINGS' button and an '+ ADD CATEGORY' button. A text block explains that categories are shared across workspaces and their order is defined in the list. Below this is a grid of categories. A modal dialog titled 'Category Parameters' is open, showing a 'Title:' label and an empty text input field. The dialog has 'OK' and 'CANCEL' buttons. At the bottom of the page, there is a trial mode notification: 'Your product is in trial mode. Only two concurrent users are allowed.'

WORKSPACE CATEGORIES RESET TO DEFAULT MENU SETTINGS + ADD CATEGORY

Because categories are shared among workspaces, changes to categories are applied to all workspaces. The order in which categories are displayed in workspaces is defined in the following list. You can drag categories to change the current order. A category is displayed in a workspace if at least one link to a form or report has been added to the category in this workspace.

Activities	Organization	Process Orders	System Health Monitori...
Transactions	User Preferences	External Tax Integration	System Maintenance
Automated Operations	Business Scenarios	Budgets	System Processes
Configuration			System Preferences
Profiles			Preferences
Boards and Maps			Email Preferences
Tasks			Wiki Preferences
Email			Localization
User Management	Expense Claims	Projection Reports	Dashboard: Finance
Access Rights	Credit Card Processing	Profitability Analysis	Dashboards
Licensing	Row-Level Security	Financial Statements	Privacy Tools
Segmented Keys	Processes	Annual Reports	Pivot Tables
Common Settings	Requisitions	Campaigns	Scenarios

Category Parameters

Title:

OK CANCEL

Deactivate Expired Cards Cash Requirements

Notify About Expiring Cards Show Less Unvisited Payments

EXIT MENU EDITING

Your product is in trial mode. Only two concurrent users are allowed.

Figure: Changing of the category for a link to a form

The screenshot displays the Acumatica user interface during menu editing. The main window shows the 'Banking' workspace with various menu items. A dialog box titled 'Item Parameters' is open, allowing the user to modify the category and title of a selected menu item. The 'Category' dropdown is set to 'Transactions', and the 'Title' field contains 'Bank Deposits'. A note below the fields states: 'Changes to the menu item will be visible in the 1 workspaces to which the item belongs.' The dialog has 'OK' and 'CANCEL' buttons.

At the top of the interface, there are buttons for '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. The left sidebar lists various workspace categories like 'Data Views', 'Bills of Material', 'Product Configurator', 'Construction', 'Time and Expenses', 'Finance', 'Banking', 'Project Management', 'Compliance', 'Currency Manage...', 'Taxes', and 'Payables'. The bottom status bar indicates: 'Your product is in trial mode. Only two concurrent users are allowed.'

User Interface: To Configure a Workspace

Story

Suppose that a customer support manager of the Muffins & Cakes company has asked you, the system administrator, to create a new workspace for quick access to customer support representatives' most used forms.

You have been asked to initially include the Customers (AR3030PL) and Cases (CR3060PL) forms in this workspace.

The workspace should be pinned to the main menu panel by default.

Also, the manager requested that you add a new tile for the quick creation of cases from Allen's Bakery, the company's highest-priority customer, for juicer repair.

Figure: The Quick Access workspace in Menu Editing mode

The screenshot displays the 'Quick Access' workspace in 'Menu Editing mode'. The interface is divided into several sections:

- Top Bar:** Contains three main actions: '+ ADD WORKSPACE', '+ ADD MENU ITEM + ADD TILE', and 'MENU SETTINGS' with a dropdown arrow.
- Left Sidebar:** Lists various system categories with icons: Configuration (gear), System Management (gauge), Integration (network), User Security (shield), Dashboards (speedometer), Commerce (shopping cart), and Quick Access (mobile phone). The 'Quick Access' item is highlighted with a red border.
- Main Content Area:** Titled 'Quick Access', it contains the instruction 'Select the items to be added to the quick menu.' and a red-bordered pin icon in the top right corner.
- Bottom Bar:** Features an 'EXIT MENU EDITING' button with a back arrow icon.
- Footer:** A blue banner at the bottom states: 'Your product is in trial mode. Only two concurrent users are allowed.'

Figure: The new tile on the Quick Access workspace in Menu Editing mode

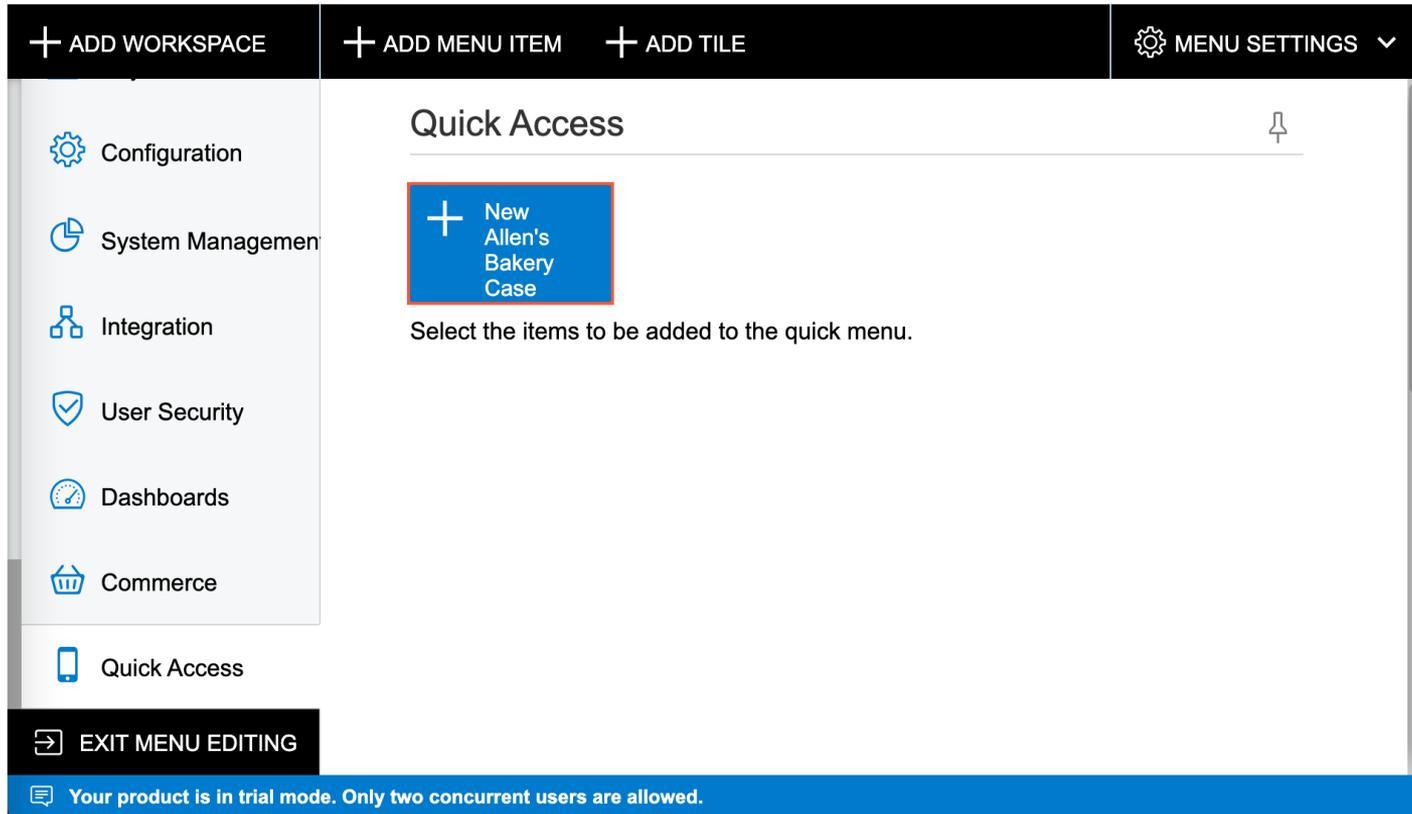


Figure: The selection of the Customers item in the Select Forms dialog box

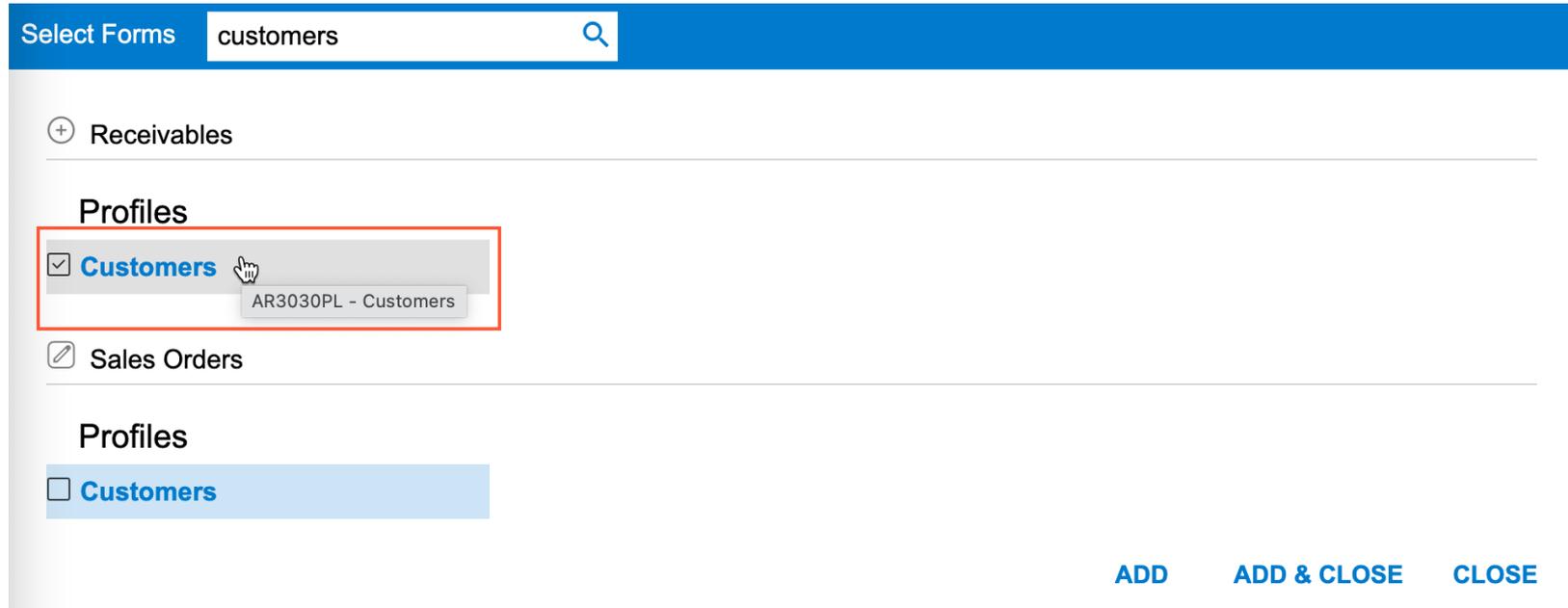
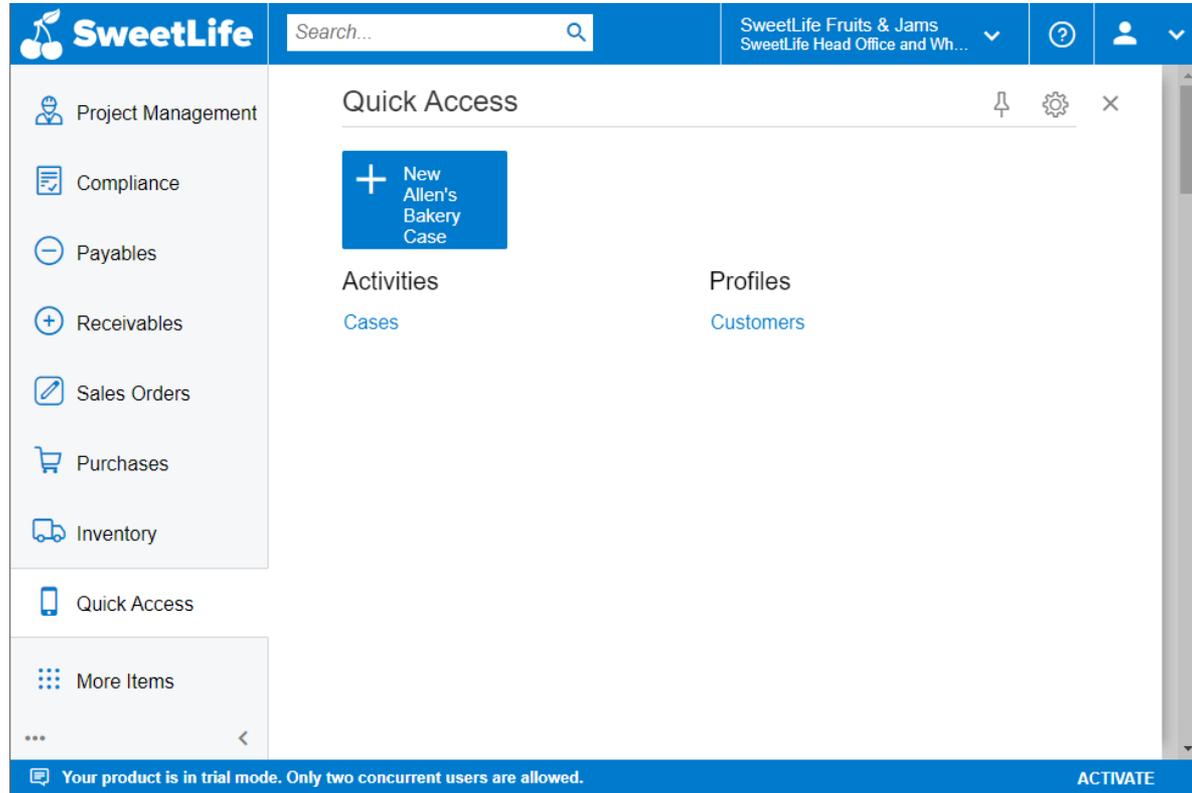


Figure: The Quick Access workspace



Lesson 1.2: Using Company Logos

Learning Objectives

In this lesson, you will learn how to display a company logo on the UI for your Acumatica ERP company or a company branch.

Company Logo Usage: To Set Up a Logo

Story

Suppose that you are a system administrator at the Muffins & Cakes company. You need to configure the user interface to have a specific look and feel for the company, so you are starting with adding to the UI the company logo the designer has prepared for you.

Figure: New logo on the screen

The screenshot displays the Muffins & Cakes software interface. The top navigation bar includes the company logo, a search bar, a refresh button, a dropdown menu for 'Muffins & Cakes', a user profile dropdown for 'Kimberly Gibbs', and utility buttons for 'NOTES', 'FILES (1)', 'CUSTOMIZATION', and 'TOOLS'. The left sidebar lists various modules: Favorites, Data Views, Time and Expenses, Finance, Banking, Construction, Project Management, Compliance, Payables, Receivables, Sales Orders, Purchases, and Inventory.

The main content area is titled 'MUFFINS - Muffins & Cakes' and shows the 'COMPANY DETAILS' tab. The 'VISUAL APPEARANCE' sub-tab is active, displaying two logo upload sections:

- SITE LOGO:** Recommended Size: Width 210px, Height 50px. The upload area shows the current logo, 'MUFFINS & Cakes'. The 'Logo File' is 'Companies (MUFFINS)\Muffins_logo.png'.
- REPORT LOGO:** Recommended Size: Width 420px, Height 100px. The upload area is currently empty, showing a placeholder for an image. The 'Logo File' field is empty.

Below the logo sections, there is a 'THEME' section with an option to 'Override Colors for the Selected Company' (unchecked) and a 'Primary Color' field set to '#007acc'.

Lesson 1.2: Using Company Logos

Learning Objectives

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

- Change the primary color of the color theme selected for your Acumatica ERP tenant
- Override the primary color of the color theme selected for your Acumatica ERP tenant on the company and branch level

Color Theme: To Change the Primary Color

Story

Suppose that a manager of the Muffins & Cakes company has asked you to change the default color theme for the company's user interface so that it complies with the Muffins & Cakes company's style guidelines and corporate colors. Acting as a system administrator, you will change the primary color.

Figure: The company color theme after the change of the primary color

The screenshot displays the 'MUFFINS & Cakes' software interface. The top navigation bar is blue with the company logo on the left and a search bar, refresh icon, and user profile on the right. The main content area is titled 'Companies' and shows details for 'MUFFINS - Muffins & Cakes'. The 'VISUAL APPEARANCE' tab is selected, showing options for 'SITE LOGO' and 'REPORT LOGO'. The 'Primary Color' is set to '#141442' and is highlighted with a red box. The 'Override Colors for the Selected Company' checkbox is checked. The bottom status bar indicates 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

Companies

MUFFINS - Muffins & Cakes

NOTES FILES (1) CUSTOMIZATION TOOLS

Company ID: MUFFINS Active

Company Name: Muffins & Cakes

Company Type: With Branches Requiring Balancing

COMPANY DETAILS BRANCHES EMPLOYEES LEDGERS VISUAL APPEARANCE

SITE LOGO

Recommended Size: Width 210px, Height 50px

Select an image to upload. Browse Upload

REPORT LOGO

Recommended Size: Width 420px, Height 100px

Select an image to upload. Browse Upload

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

Logo File: Companies (MUFFINS)Muffins_logo.png

THEME

Override Colors for the Selected Company

Primary Color: #141442

Your product is in trial mode. Only two concurrent users are allowed. ACTIVATE

Day 2

A close-up photograph of a person's hand pouring beer from a tap into a glass. The person is wearing a checkered shirt and a black watch. The glass has the Devil's Peak logo, which features a spade symbol and the text "Devil's Peak BREWING COMPANY". The background is a blurred bar or brewery setting with other people and taps.

Part 2: Managing Tenants, Snapshots, Customization Projects, and Scheduled Processing

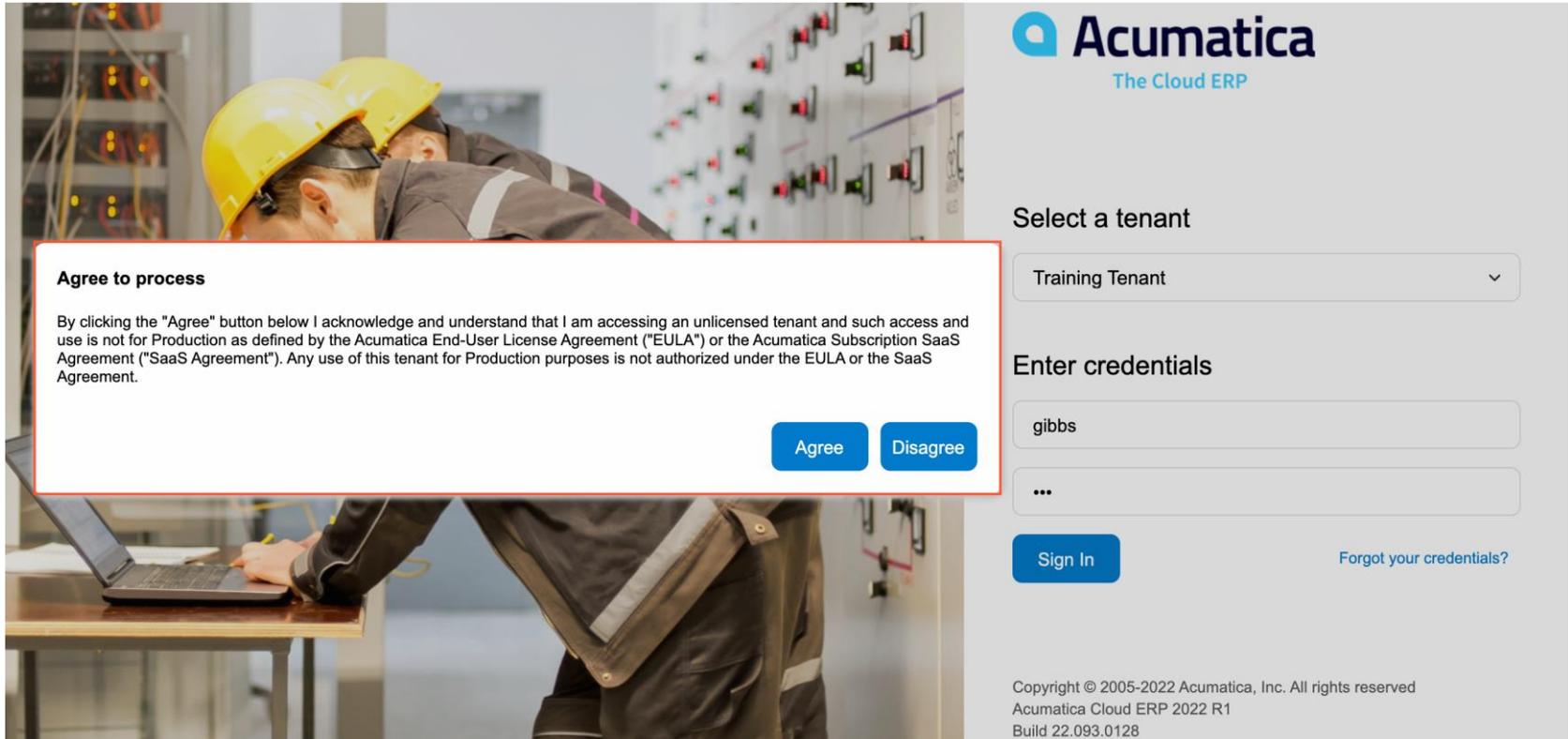
Lesson 2.1: Managing Tenants by Using the Web Interface

Learning Objectives

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

- Create a tenant for testing purposes
- Copy an existing tenant for testing purposes
- Convert a production tenant to a test tenant
- Delete a tenant

Figure: Confirmation dialog box for signing in to a test tenant



The image shows a screenshot of the Acumatica login page. On the left, a background image shows two workers in yellow hard hats and safety gear working on a control panel. Overlaid on this is a white confirmation dialog box with a red border. The dialog box has the title "Agree to process" and contains a paragraph of legal text. Below the text are two buttons: "Agree" and "Disagree". To the right of the dialog box is the Acumatica login interface. It features the Acumatica logo and tagline "The Cloud ERP". Below the logo is a "Select a tenant" dropdown menu currently showing "Training Tenant". Underneath is the "Enter credentials" section with a text input field containing "gibbs" and a password field with three dots. A blue "Sign In" button is positioned below the password field, and a link for "Forgot your credentials?" is to its right. At the bottom of the login page, there is a copyright notice: "Copyright © 2005-2022 Acumatica, Inc. All rights reserved. Acumatica Cloud ERP 2022 R1. Build 22.093.0128".

Agree to process

By clicking the "Agree" button below I acknowledge and understand that I am accessing an unlicensed tenant and such access and use is not for Production as defined by the Acumatica End-User License Agreement ("EULA") or the Acumatica Subscription SaaS Agreement ("SaaS Agreement"). Any use of this tenant for Production purposes is not authorized under the EULA or the SaaS Agreement.

Agree Disagree

Acumatica
The Cloud ERP

Select a tenant

Training Tenant

Enter credentials

gibbs

...

Sign In [Forgot your credentials?](#)

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Acumatica Cloud ERP 2022 R1
Build 22.093.0128

Tenants: To Create a Test Environment

Story

Suppose that SweetLife Fruits & Jams has a new hire (a system administrator) who should complete training during their probation period. To complete the training, the new system administrator needs an empty tenant and a copy of the production tenant. Acting as the system administrator, you will create two test tenants, one with an out-of-the-box company and another with all the data of production tenant. When the new system administrator completes the training, you will delete the empty tenant.

Lesson 2.2: Working with Snapshots

Learning Objectives

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

- Take a snapshot of tenant-specific content
- Export a snapshot to external storage
- Review the manifest.xml file of the snapshot to find out its details
- Import a snapshot
- Restore a snapshot in a destination tenant

Snapshots: To Take, Restore, and Delete a Snapshot

Story

Suppose that SweetLife Fruits & Jams has a new hire, Alberto Jimenez, who should complete a training course during his probation period. To complete the training, the new employee needs a copy of the production tenant.

Acting as a system administrator, you need to create a test tenant for the new employee. To save space, you will take a snapshot whose content is limited to settings and business accounts of the production tenant, instead of copying all production tenant data. You will toggle the snapshot visibility and restore this snapshot for the test tenant. Then you will delete the snapshot.

Figure: The new tenant with the default workspaces

The screenshot displays the Acumatica user interface for configuring a new tenant. The top navigation bar includes the Acumatica logo, a search bar, a refresh button, a dropdown menu, a help icon, and a user profile icon. The left sidebar contains navigation options: 'Favorites', 'Data Views', and 'More Items'. The main content area is titled 'Tenants' and shows a list of tenants. The selected tenant, 'JimenezF100', is highlighted with a red box. Below the list, the tenant details are displayed:

- Tenant ID: 3
- Tenant Name: JimenezF100
- * Login Name: JimenezF100
- Cloud Tenant ID: d693cc24-65fe-4694-aaf3-13b154262ca8
- Status: Test Tenant

On the right side of the tenant details, the user 'Kimberly Gibbs' (gibbs@sweetlife.com) is listed with a 'MY PROFILE' link. Below this, there is a 'Last sign-in' field and a 'SIGN OUT' button.

At the bottom of the main content area, there are tabs for 'SNAPSHOTS', 'SNAPSHOT RESTORATION HISTORY', and 'USERS'. The 'SNAPSHOTS' tab is active, showing a table with columns: Name, Description, Real For Expi, Size on Disk (MB), Creation Date, Versic, Export Mode, Tenant ID, Customizatio, and Is Safe. The table is currently empty.

A blue banner at the bottom of the interface contains the message: 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

Figure: Name of the source tenant specified for the snapshot

Tenants CUSTOMIZATION TOOLS ▾

📄 ↶ + 🗑️ < > CREATE SNAPSHOT RESTORE SNAPSHOT ...

Tenant ID: 🔍 Cloud Tenant ID: 0466d3b6-4883-4a2a-b678-927ac9135a5a

Tenant Name: Status: Test Tenant

* Login Name:

[SNAPSHOTS](#) [SNAPSHOT RESTORATION HISTORY](#) [USERS](#)

🔄 ✕ IMPORT SNAPSHOT PREPARE FOR EXPORT ▾ EXPORT SNAPSHOT CHANGE VISIBILITY |←| 🗑️

📄	🔗	📄	Name	Description	Ready For Export	Size on Disk (MB)	Creation Date	Version	Export Mode	Tenant ID	Customization	Is Safe
>	🔗	📄	U100_20...	Snapshot for Jimenez	<input type="checkbox"/>				Settings and Business Accounts	U100 (2)		<input type="checkbox"/>

Figure: A test tenant with the data from the restored snapshot

The screenshot displays the SweetLife ERP interface. The top navigation bar includes the SweetLife logo, a search bar, a refresh icon, the current user 'Kimberly Gibbs JimenezF100', and a help icon. The left sidebar contains navigation options: Favorites, Data Views, Time and Expenses, Finance, Banking, Construction, Project Management, Compliance, and Payables. The main content area is titled 'Tenants' and shows a list of tenants. The tenant 'JimenezF100' is selected and highlighted with a red box. Below the list, the details for the selected tenant are shown:

Tenant ID: 3
Tenant Name: JimenezF100
* Login Name: JimenezF100
Cloud Tenant ID: 308c07eb-b10
Status: Test Tenant

Below the details, there are tabs for 'SNAPSHOTS', 'SNAPSHOT RESTORATION HISTORY', and 'USERS'. The 'SNAPSHOTS' tab is active, showing a table with columns: Name, Description, Ready For Export, Size on Disk (MB), Creation Date, Versio, Export Mode, Tenant ID, Customization, and Is Safe. The table is currently empty.

On the right side of the interface, there is a user profile card for 'Kimberly Gibbs gibbs@sweetlife.com' with a 'MY PROFILE' link. Below that, there is a 'Last sign-in' field and a 'SIGN OUT' link.

At the bottom of the interface, there is a blue banner with the text: 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

Snapshots: To Export and Import a Snapshot

Story

Suppose that SweetLife Fruits & Jams has a new hire, Peter Lai, who should complete training during his probation period. To complete the training, the new employee needs a copy of the production tenant. Acting as a system administrator, you need to create a tenant in a sandbox (an instance of Acumatica ERP that has no production tenants) for the new employee. To move data between instances, you export a snapshot of the production tenant and import it to the test tenant. To save space, you take a snapshot with content limited to the settings and business accounts of the production tenant, and you prepare this snapshot for export.

Lesson 2.3: Scheduling Automated Processing

Learning Objectives

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

- Schedule automatic processing
- View the history of executions
- Delete the history of scheduled processes

Figure: The Selection area of a form with the ability to select a specific operation

Print Invoices and Memos

CUSTOMIZATION

TOOLS ▾

🔄 ↶ PROCESS PROCESS ALL ⌚ ▾ ⏪ ☒ 🔍

Action: ▾

Assigned To: <SELECT>

Workgroup: ▾

Me Start Date: ▾

My End Date: ▾

Show All

			<input type="checkbox"/>	Type	Reference Nbr.	Status	Date	Post Period	Customer
>			<input type="checkbox"/>	Credit Memo	000068	Open	1/23/2021	01-2021	COFFEESHOP
			<input type="checkbox"/>	Credit Memo	000071	Open	1/24/2021	01-2021	HMBAKERY
			<input type="checkbox"/>	Credit Memo	000081	Open	1/24/2021	01-2021	MORNINGCAF

Figure: The condition specified in the Selection area being copied to the Filter Values tab of a schedule

The screenshot shows the 'Recalculate Customer Balances' application interface. At the top, there are navigation buttons: 'PROCESS', 'PROCESS ALL', and a search icon. Below this, there are input fields for 'Fin. Period' (set to '06-2021') and 'Customer Class'. A modal window titled 'Automation Schedules' is open, displaying a form for creating a new schedule. The 'Filter Values' tab is selected, showing a table with the following data:

Active	*Field Name	Relative	Value
<input checked="" type="checkbox"/>	Fin. Period	<input type="checkbox"/>	06-2021

Figure: Application of a simple filter to the Amount column

Print Invoices and Memos CUSTOMIZATION TOOLS ▾

🔄 ↶ PROCESS PROCESS ALL ↷ ⏪ ⏩ 🗑️ 🔍

Action: Show All

Assigned To: Me Start Date:

Workgroup: My End Date:

🗑️	🔍	📄	☐	Type	Reference Nbr.	Customer	Customer Name	Amount
>	🗑️	📄	☐	Credit Memo	000068	COFFEESHOP	FourStar Coffee & S	
	🗑️	📄	☐	Credit Memo	000071	HMBAKERY	HM's Bakery & Cafe	
	🗑️	📄	☐	Credit Memo	000081	MORNINGCAF	Morning Cafe	
	🗑️	📄	☐	Invoice	000001	COFFEESHOP	FourStar Coffee & S	
	🗑️	📄	☐	Invoice	000002	GOODFOOD	GoodFood One Res	
	🗑️	📄	☐	Invoice	000003	COFFEESHOP	FourStar Coffee & S	
	🗑️	📄	☐	Invoice	000004	COFFEESHOP	FourStar Coffee & S	
	🗑️	📄	☐	Invoice	000005	GOODFOOD	GoodFood One Res	
	🗑️	📄	☐	Invoice	000006	HMBAKERY	HM's Bakery & Cafe	
	🗑️	📄	☐	Invoice	000007	HMBAKERY	HM's Bakery & Cafe	
	🗑️	📄	☐	Invoice	000008	GOODFOOD	GoodFood One Res	
	🗑️	📄	☐	Invoice	000009	HMBAKERY	HM's Bakery & Cafe	
	🗑️	📄	☐	Invoice	000010	GOODFOOD	GoodFood One Res	
	🗑️	📄	☐	Invoice	000011	HMBAKERY	HM's Bakery & Cafe	
	🗑️	📄	☐	Invoice	000012	GOODFOOD	GoodFood One Restaurant	316.57

Sort Ascending

Sort Descending

Clear Filter

Equals

Does Not Equal

Is Greater Than

Is Greater Than or Equal To

Is Less Than

Is Less Than or Equal To

Is Between

From:

To:

OK CANCEL

Figure: The copied condition of a simple filter applied to the Amount column

The screenshot displays a software interface for managing invoices and memos. At the top, the title is "Print Invoices and Memos" with sub-menus for "CUSTOMIZATION" and "TOOLS". Below the title are several action buttons: "PROCESS", "PROCESS ALL", and a search icon. A search bar is also present.

The main interface includes a form for filtering and actions. The "Action" dropdown is set to "Print". There are checkboxes for "Me" and "My" under "Assigned To" and "Workgroup:". The "Start Date" is set to "5/5/2021" and the "End Date" is set to "6/5/2021". A "Show All" checkbox is checked.

A table below the form shows a list of items. The columns are "Type", "Reference Nbr.", "Customer", "Customer Name", "Amount", and "Status". A red box highlights the "Amount" column header. The first row shows a "Credit Memo" with reference number "000068", customer "COFFEESHOP", and an amount of "60.00".

An "Automation Schedules" dialog box is open in the foreground. It has tabs for "NOTES", "FILES", "CUSTOMIZATION", and "TOOLS". The "Automation Schedules" section shows a "Schedule ID" of "<NEW>" and a checked "Active" status. The "Description" field is empty. The "Screen ID" is "Print Invoices and Memos" and the "Action Name" is "Process All".

Below the dialog, there are tabs for "DETAILS", "SCHEDULE", "CONDITIONS", and "FILTER VALUES". The "CONDITIONS" tab is selected. A table shows a list of conditions. A red box highlights the first condition:

Active	*Field Name	*Condit	Relati	Value	Value 2
<input checked="" type="checkbox"/>	Amount	Is Between	<input type="checkbox"/>	50.00	250.00

Figure: Schedule execution based on days

Automation Schedules NOTES FILES CUSTOMIZATION TOOLS ▾

📄 ↶ + 🗑️ ⏪ < > ⏩ VIEW SCREEN VIEW HISTORY

Schedule ID: Active

* Description:

* Screen ID:

DETAILS **SCHEDULE** CONDITIONS

SCHEDULE TYPE

Daily

Weekly

Monthly

By Financial Period

SCHEDULE DETAILS

* Next Execution Date:

Every: Day(s)

EXECUTION TIME

Starts On: * Next Execution Time:

Stops On:

Every:

Exact Time

Figure: Schedule execution based on weeks

Automation Schedules NOTES FILES CUSTOMIZATION TOOLS

+ ↶ ↷ ↸ ↹ VIEW SCREEN VIEW HISTORY

Schedule ID: Active

* Description:

* Screen ID: * Action Name:

DETAILS **SCHEDULE** CONDITIONS

SCHEDULE TYPE

Daily

Weekly

Monthly

By Financial Period

SCHEDULE DETAILS

* Next Execution Date:

Every: **Week(s)**

Sunday Wednesday Saturday

Monday Thursday

Tuesday Friday

EXECUTION TIME

Starts On: * Next Execution Time:

Stops On:

Every: Exact Time

Figure: Schedule execution based on months

Automation Schedules NOTES FILES CUSTOMIZATION TOOLS

📄 ↶ + 🗑️ ⏪ < > ⏩ VIEW SCREEN VIEW HISTORY

Schedule ID: Active

* Description:

* Screen ID: * Action Name:

DETAILS **SCHEDULE** CONDITIONS

SCHEDULE TYPE **SCHEDULE DETAILS**

Daily

Weekly

Monthly

By Financial Period

* Next Execution Date:

Every:

On Day

On the

EXECUTION TIME

Starts On: * Next Execution Time:

Stops On:

Every: Exact Time

Figure: Schedule execution based on the dates of financial periods

Automation Schedules NOTES FILES CUSTOMIZATION TOOLS

📄 ↶ + 🗑️ ⏪ < > ⏩ VIEW SCREEN VIEW HISTORY

Schedule ID: Active

* Description:

* Screen ID: * Action Name:

DETAILS **SCHEDULE** CONDITIONS

SCHEDULE TYPE

Daily

Weekly

Monthly

By Financial Period

SCHEDULE DETAILS

* Next Execution Date:

Every: Period(s)

End of the Period

Start of the Period

Fixed Day of the Period

EXECUTION TIME

Starts On: * Next Execution Time:

Stops On: Exact Time

Every:

Figure: Schedule execution in successive sessions

Automation Schedules NOTES FILES CUSTOMIZATION TOOLS ▾

📄 ↶ + 🗑️ ⏪ < > ⏩ VIEW SCREEN VIEW HISTORY

Schedule ID: Active

* Description:

* Screen ID: * Action Name:

DETAILS **SCHEDULE** CONDITIONS

SCHEDULE TYPE

Daily

Weekly

Monthly

By Financial Period

SCHEDULE DETAILS

* Next Execution Date:

Every: Day(s)

EXECUTION TIME

Starts On: * Next Execution Time:

Stops On: Exact Time

Every:

Automated Processing: To Configure Scheduled Processing

Story

Suppose that in the SweetLife Fruits & Jams company, AP clerks enter the bills into the system on a daily basis. The accountant does not need to manually release bills for the Karn Design Inc. vendor with amounts more than \$1000 USD and less than or equal to \$5000 USD. These bills should be released automatically to free up the accountant's time. You, as the system administrator, need to schedule this processing—that is, automate the release of AP documents that have the Balanced status, KADESIGN vendor, and amounts equal to or more than \$1000 USD and less than or equal to \$5000 USD.

Figure: The processing results of a particular schedule execution

The screenshot displays the 'Automation Schedule History' interface. At the top, there are navigation options: 'CUSTOMIZATION' and 'TOOLS'. Below this, there are icons for refresh, undo, delete, delete all, and search. The main area contains search filters for 'Screen' (Release AP Documents) and 'Schedule' (Release AP bills with amounts between \$1000 and \$5000 for KA), along with 'From' and 'To' date pickers.

The main table lists schedule executions with columns: Status, Screen ID, Schedule, Execution Date, Total Records, Process, Warning, Errors, and Execution Result. Two rows are visible, both with a status of 'Processing completed'. The second row has a red box around the 'Total Records' column, which contains the value '4'. A red circle with the number '1' is placed over this '4'.

A 'Processing Results' dialog box is open, showing a table of individual record processing outcomes. A red circle with the number '2' is placed over the top-left corner of this dialog. The dialog table has columns for status, message, and 'Nbr.'. All four records show a successful status and the message 'The record has been processed successfully.' with a 'Bill' link. The 'Nbr.' values are 000060, 000061, 000062, and 000063, all associated with 'KADESIGN'. A 'CLOSE' button is at the bottom right of the dialog.

Stat	Screen ID	Schedule	Execution Date	Total Records	Process	Warning	Errors	Execution Result
✓	AP.50.10.00	Release AP bills with amounts between...	11/23/2021 9:58 AM	0	0	0	0	Processing completed
✓	AP.50.10.00	Release AP bills with amounts between...	11/23/2021 9:56 AM	4	4	0	0	Processing completed

		Nbr.	
✓	The record has been processed successfully. Bill	000060	KADESIGN
✓	The record has been processed successfully. Bill	000061	KADESIGN
✓	The record has been processed successfully. Bill	000062	KADESIGN
✓	The record has been processed successfully. Bill	000063	KADESIGN

Day 3

Lesson 2.4: Publishing Customization Projects

Learning Objectives

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

- Import deployment packages to a tenant
- Publish multiple customization projects to an instance
- Unpublish the projects

Customization Projects: To Publish Projects

Story

Suppose that SweetLife Fruits & Jams has decided to investigate new business opportunities. For this purpose, the company has received the PhoneRepairShop and Yogifon customization projects from a third-party vendor for a trial run. Acting as the system administrator, you need to apply these customizations to a sandbox (an instance of Acumatica ERP that has no production tenants).

Customization Projects: To Publish Projects

The customization projects will introduce the following functionality.

Customization Project	Website Changes	Metadata
<i>Yogifon</i>	Adds a predefined field (Type) to the General tab (Account Address section) of the <i>Customers</i> (AR303000) form.	<ul style="list-style-type: none">• Adds the Open Sales Orders by Customers (GI400001) generic inquiry to the database and to the site map• Adds a user-defined field (Network Type) to the <i>Customers</i> form• Adds the SO Open by Customers non-programmable command, which a user clicks to open the corresponding generic inquiry
<i>PhoneRepairShop</i>	Adds two forms: Repair Services (RS201000) and Serviced Devices (RS202000). The company will use these forms to manage the lists of repair services that are provided and devices that can be serviced, respectively.	<ul style="list-style-type: none">• Adds the Phone Repair Shop workspace• Adds the Serviced Devices (RS2020PL) generic inquiry, which is configured as the entry-point form for the Serviced Devices (RS202000) form• Adds the forms and generic inquiry to the site map• Adds test data—that is, predefined services and devices

Figure: The Compilation dialog box

Customization Projects CUSTOMIZATION TOOLS ▾

🔄 📁 ↶ + ✕ PUBLISH IMPORT EXPORT ...

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Project Name	Level	Screen Names	Description	Created By	Last Modified On
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PhoneRepairShop	RS201000,...			Kimberly Gibbs	10/7/2021
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yogifon	AR303000,...			Kimberly Gibbs	10/7/2021

Compilation

```
XportScenario#Import GL Transactions
Updating website files
Starting the website
Plug-in InputData
RSSVRepairService updated
RSSVDevice updated
Plug-in ExternalCarriersCstPlugIn
Updating the database
Actions#AR303000
Actions#AR303000 upgraded in runtime for publication.
Actions#CR301000
Actions#CR301000 upgraded in runtime for publication.
Fields#AR303000
Fields#CR301000
Fields#CR301000 upgraded in runtime for publication.
Fields#CR306000
Website updated.
Customization project published successfully. You can close the Compilation pane.
Close Compilation pane
```

Figure: The changes introduced by the Yogifon customization project on the Customers form

The screenshot displays the 'Customers' form for 'ABAKERY - Allen's Bakery'. The form is divided into several sections: 'ACCOUNT INFO', 'ACCOUNT ADDRESS', 'PRIMARY CONTACT', and 'ADDITIONAL ACCOUNT INFO'. The 'USER-DEFINED FIELDS' section is highlighted, showing a 'Network Type' dropdown menu. A red box highlights the 'Network Type' dropdown, and a red circle with the number '1' is next to it. Another red box highlights the 'Type' dropdown menu in the 'ACCOUNT ADDRESS' section, with a red circle and the number '2' next to it. A third red box highlights the 'SO Open By Customer' option in the dropdown menu, with a red circle and the number '3' next to it. The dropdown menu also includes options like 'Customer Management', 'Inquiries', 'Document Processing', 'Statements', and 'Other'.

Customers
ABAKERY - Allen's Bakery

NOTES FILES CUSTOMIZATION TOOLS

DOCUMENT USER-DEFINED FIELDS

1 Network Type: [dropdown]

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS

ACCOUNT INFO
* Account Name: Allen's Bakery

ACCOUNT ADDRESS
VIEW ON MAP

2 Type: Business [dropdown]

Address Line 1: 3130 Small Street
Address Line 2:
City: New York
State: NY - NEW YORK
Postal Code: 10019
* Country: US - United States of America

ADDITIONAL ACCOUNT INFO
Business 1 [dropdown] 507-286-2951
Cell [dropdown]
Fax [dropdown]
Account Email: beverly@abakery.example.com
Web: www.abakery.example.com
Ext Ref Nbr:

PRIMARY CONTACT
Name:
Job Title:
Email:
Business 1 [dropdown]
Cell [dropdown]

Customer Management
Create Contact
Extend as Vendor
Document Processing
Create Invoice
Create Sales Order
Create Payment
Write Off Balance
Statements
Generate on Demand
Regenerate Last Statement
Statement History
Print Statement
Other
View Account
View Vendor
Change ID

Inquiries
Customer Details
Sales Prices
3 SO Open By Customer
Reports
AR Balance by Customer
AR Register
Customer History
AR Aging
AR Coming Due
Customer Profile

Figure: The new Phone Repair Shop workspace

The screenshot displays the SweetLife mobile application interface. At the top, the header includes the SweetLife logo, a search bar, and the user's name 'SweetLife Fruits & Jams' with a dropdown arrow. Below the header is a sidebar menu with options: Favorites, Data Views, Phone Repair Shop (highlighted with a red box), Time and Expenses, and Finance. The main content area shows the 'Phone Repair Shop' workspace with a title bar containing a pin, settings, and close icon. Under the title, there is a 'Configuration' section with two items: 'Repair Services' and 'Serviced Devices', both highlighted with red boxes. At the bottom, a blue banner contains the text 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

Figure: The new Repair Services form with the test data

Repair Services

CUSTOMIZATION TOOLS ▾



			* Service ID	* Description	Active	Walk-In Service	Requires Prepayment	Requires Preliminary Check
>	📎	📄	BATTERYREPLACE	Battery Replacement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	📎	📄	LIQUIDDAMAGE	Liquid Damage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	📎	📄	SCREENREPAIR	Screen Repair	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure: Unpublished customization packages

Customization Projects CUSTOMIZATION TOOLS ▾

🔄 📁 ↶ + ✕ PUBLISH IMPORT EXPORT ...

   <input type="checkbox"/>	Published	*Project Name	Level	Screen Names	Description	Created By	Last Modified On
>   <input type="checkbox"/>	<input type="checkbox"/>	PhoneRepairShop		RS201000,...		Kimberly Gibbs	10/12/2021
  <input type="checkbox"/>	<input type="checkbox"/>	Yogifon		AR303000,...		Kimberly Gibbs	10/12/2021

Figure: The forms for which you have cleared the check boxes in the Workspaces column

Site Map CUSTOMIZATION TOOLS ▾

🔄 📄 ↶ + × |←| 🗑️ RS.20 🔍

Screen ID	Title	* URL	Graph Type	Workspaces	Category
RS.20.10.00	Repair Services	~/Pages/RS/RS201000.aspx		<input type="checkbox"/> Data Views	Configuration
RS.20.20.00	Serviced Devices	~/Pages/RS/RS202000.aspx		<input type="checkbox"/> Bills of Material	Configuration
RS.20.20.PL	Serviced Devices	~/GenericInquiry/GenericInq...	PX.Data.PXGenericInqGrph	<input checked="" type="checkbox"/> Phone Repair Shop	Series
				<input type="checkbox"/> Product Configurator	
				<input type="checkbox"/> Time and Expenses	
				<input type="checkbox"/> Finance	
				<input type="checkbox"/> Banking	
				<input type="checkbox"/> Construction	
				<input type="checkbox"/> Project Management	
				<input type="checkbox"/> Compliance	
				<input type="checkbox"/> Currency Management	

|< < > >|

Figure: Deletion of a workspace

The screenshot displays the Acumatica workspace editor interface. The top navigation bar includes options for '+ ADD WORKSPACE', '+ ADD MENU ITEM', '+ ADD TILE', and 'MENU SETTINGS'. The left sidebar lists various workspace categories: 'Data Views', 'Phone Rep.', 'Bills of Material', 'Product Configurator', 'Time and Expenses', and 'Finance'. The 'Phone Rep.' workspace is highlighted with a red border and a red 'X' icon, indicating it is being deleted. A blue callout box with the text 'Delete workspace' points to the 'Phone Rep.' workspace. The main area shows a 'Site Map' view with a search bar containing 'RS.20' and a table of workspace items.

* Screen ID	Title	* URL	Graph Type
20.10.00	Repair Services	~/Pages/RS/RS201000.aspx	
RS.20.20.00	Serviced Devices	~/Pages/RS/RS202000.aspx	
RS.20.20.PL	Serviced Devices	~/GenericInquiry/GenericInq...	PX.Data.PXGenericInqGrp

At the bottom of the interface, a blue banner displays the message: 'Your product is in trial mode. Only two concurrent users are allowed.'



Part 3: Maintaining System Health

Lesson 3.1: Monitoring System Health

Learning Objectives

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

- Monitor currently running processes, and discover and analyze any threads that are currently frozen or no longer responding
- Review the list of active users
- Track memory and CPU utilization
- Analyze a log of system events
- Monitor the statuses of push notifications and business event queues
- Use the Request Profiler tool
- Use the Developer Tools of the browser

Figure: The submission of performance logs

The screenshot displays the 'Acumatica Trace' interface. At the top right, there is a blue button labeled 'SUBMIT LOGS'. Below it, there are two buttons: 'Expand All' and 'Collapse All'. The main content area shows a list of information items, each with a 'Details' link and a 'Send' button. A modal dialog box titled 'Logs Submitted' is overlaid on the interface. The dialog contains the following text:

Logs Submitted [Close]

Technical details about the last actions have been submitted to Acumatica Inc. If you want to contact your Acumatica support provider about this log, save the following trace log ID:

029f85c6-a1a7-4e22-aa42-b32dedbe9ddb [Copy]

The background interface shows several 'Information' items, each with a 'Details' link and a 'Send' button. The text in the background is partially obscured by the dialog box.

System Health: To Monitor Performance

Story

Suppose that your colleague complains that the Acumatica ERP instance sometimes has slow progress during the creation of a snapshot and when the colleague works with the Journal Transactions (GL301000) form. You need to find out what is going wrong and perform the needed actions to restore system performance.

Lesson 3.2: Maintaining Database by Using the Web Interface

Learning Objectives

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

- Monitor the size of a database
- Optimize a database
- Clean up a database

System Health: To Monitor Performance

Story

Suppose that as the number of employees of SweetLife Fruits & Jams has grown and more users perform operations in Acumatica ERP, the database has significantly grown too. System administrators perform a regular review of the database. Now, acting as a system administrator, you need to review the database usage and pay special attention to the space used by the database.

Lesson 3.3: Building Search Indexes

Learning Objectives

In this lesson, you will learn how to build search indexes.

Figure: The system offers the link to perform the search with the Contains condition

Journal Transactions CUSTOMIZATION ▾ TOOLS ▾

Module: All ▾ Status: All ▾ Ledger: All ▾   ... 

Post Period: All ▾

  	Module	Batch Number	Status	Ledger	Transaction Date	Post Period	D
 Nothing has been found that starts with 'labels;'. Try using a different or less specific search term. <a data-bbox="627 820 1304 871" href="#" style="border: 1px solid red; padding: 2px;">Search all records that contain 'labels;' <a data-bbox="898 874 1033 904" href="#">Clear search							

Search Indexes: To Rebuild Search Indexes

Story

Suppose that the users of the system have started complaining that the system does not return any search results when users search for a customer profile. Acting as the system administrator, you need to investigate the issue, and the first step you plan to take is rebuilding the search index for customer profiles.

Lesson 3.4: Updating Acumatica ERP by Using the Web Interface

Learning Objectives

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

- Configure update preferences
- Prepare for update
- Schedule the system lockout and unlock the system afterward
- Install a minor update

Figure: Notification about a new version

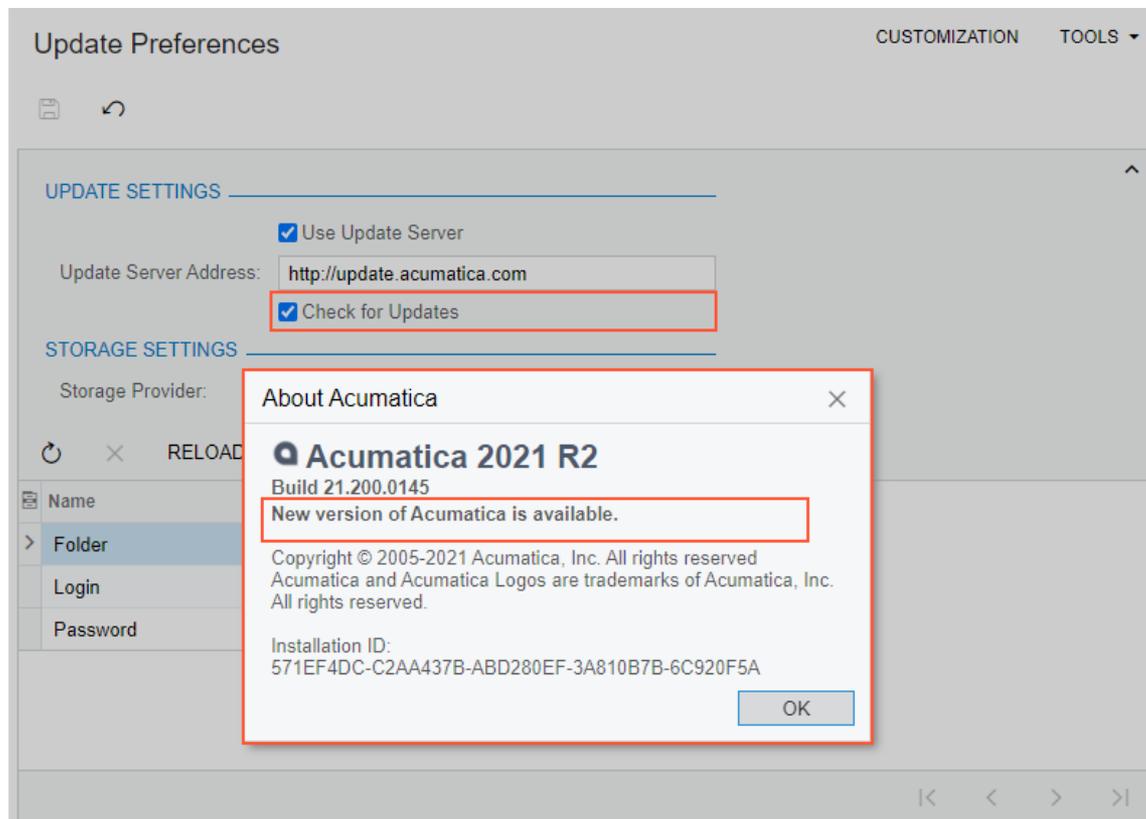


Figure: An update available for download from the Acumatica update server

Apply Updates CUSTOMIZATION TOOLS ▾

↶ RESTART APPLICATION SCHEDULE LOCKOUT ...

Current Version: 21.200.0145 Last Update Date:

UPDATES UPDATE HISTORY

Restriction Key:

↶ UPLOAD CUSTOM PACKAGE **DOWNLOAD PACKAGE** INSTALL UPDATE VALIDATE CUSTOMIZATION |↔| ☒

Version	Published Date	Restricted	Ready to Install
> 21.201.0086	10/13/2021 10:44 AM	<input type="checkbox"/>	<input type="checkbox"/>

Figure: A lockout message on the Sign-In page



The site is under maintenance. Only administrators can log in.
Reason: Maintenance

Select a tenant

Enter credentials

[Forgot your credentials?](#)



Update of Acumatica ERP: To Update an Instance by Using the Web Interface

Story

Suppose that your company deployed Acumatica ERP on-premises. Acting as the system administrator, you have received notification that a new minor update is available and approved the update installation with your manager.

Figure: Uploaded installation package that is ready for installation

Apply Updates ☆

CUSTOMIZATION

TOOLS ▾

↶ RESTART APPLICATION SCHEDULE LOCKOUT ...

Current Version: 22.10

Last Update Date:

UPDATES

UPDATE HISTORY

Restriction Key:



UPLOAD CUSTOM PACKAGE

DOWNLOAD PACKAGE

INSTALL UPDATE

VALIDATE CUSTOMIZATION



Version	Published Date	Restricted	Ready to Install
> 22.10		<input type="checkbox"/>	<input checked="" type="checkbox"/>
22.10		<input type="checkbox"/>	<input type="checkbox"/>

Figure: The Maintenance page with the warning

**Site is under maintenance and can not be accessed at this time.
Reason: Maintenance**

No Reliance

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Thank you

David Harris