



# System Management and Self-Service Portal

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# Webinar Timings

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## Day 1

Monday Nov 25 2019 – 9:00 AM EST to 11:00 AM EST

## Day 2

Tuesday Nov 26 2019 – 9:00 AM EST to 11:00 AM EST

## Day 3

Wednesday Nov 27 2019 – 9:00 AM EST to 11:00 AM EST

# Webinar Rules

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All participants are placed in mute mode.

Participants use Raise Hand and Chat window when have any questions.

There is a limit of 100 participants that can join the webinar.

Participants that received web instance must use user name and password provided to them for all exercises.

Participants that did not receive web instance must use their local instance for all exercises.

Self-Test Exercises are for participants to complete and will not be covered.

# Agenda – Day 1

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Company Story

Lesson 1: Configuring Segmented Keys

Lesson 2: Configuring Schedules

Lesson 3: Configuring Notifications

Lesson 4: Adding Attributes and User-Defined Fields

Lesson 5: Securing Multiple Branches

## Agenda – Day 2

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Lesson 6: Configuring Restriction Groups

Lesson 7: Monitoring Performance

Lesson 8: Performing Database Maintenance

Lesson 9: Configuring Business Process Monitoring

## Agenda – Day 3

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Lesson 10: Configuring Acumatica ERP Self-Service Portal

Lesson 11: Managing Access to the Self-Service Portal

Lesson 12: Managing Online Orders

Lesson 13: Managing Cases with Self-Service Portal

Session Conclusion and Feedback

# Company Story

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## SweetLife Fruits & Jams company

### Company Structure (Branches)

- SweetLife Head Office and Wholesale Center
- SweetLife Store
- Service and Equipment Sales Center

### Operational Activity

- Became operational in Jan 2018
- Started using Acumatica ERP and CRM in Nov 2018
- With growth, Equipment Sales became operational in Jan 2019

# Company Story (cont.)

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## Company Purchases

- Fruits & spices from large fruit vendors
- Jars, labels & paper bags from various vendors
- Stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors for internal use
- Juicer machines from large juicer equipment vendor
  - Installation services for complex installations



# Company Story (cont.)

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## Company Sales & Services

- Office & Wholesale branch
  - Sells jams & fruit to wholesale customers, such as restaurants & cafes
  - Provides home canning training to wholesale customers
  - Conducts webinars to wholesale customers
- Store
  - Sells jams, fruit and berries to retail customers, including order pickup for web orders.
  - Handles web orders that require purchase on demand (like tropical fruits) and drop-ship (like tea)
- Service & Equipment Sales
  - Sells juicer equipment, offers training, installation, site review & maintenance services

# Company Story (cont.)

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## Customer Relationship Management

- Need to handle mainly 2 types of current & potential customers
  - End customers
  - Referral partners
- Marketing team purchases list of leads, receives direct phone, email and online inquiries and turns them into leads
- Sales team works on these leads and aims at converting them to actual sales
- Runs frequent marketing campaigns, send out company newsletters, and special offers

# Lesson 1: Configuring Segmented Keys

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In this lesson, you will learn how to configure segmented keys.

- Use Segmented Keys (CS202000) form to configure segment keys
- Use Segment Values (CS203000) form to create predefined list of values for each segment of Segmented Keys

## Lesson 2: Configuring Schedules

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In this lesson, you will learn how to enable the processing of schedules and set up this processing on a particular processing form. You will also learn how to review the history of a specific schedule and how to view all the schedules configured in the system.

- Ensure Scheduled Processing feature is enabled
- Use processing screen to define schedule
- Use Automation Schedules (SM205030) form to view configured schedules in the system

## Lesson 3: Configuring Notifications

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In this lesson, you will learn how to set up notifications about events, and notification templates of the text to be sent to employees about these events. You will also learn how to configure notifications about the changes made on data entry forms.

- Use Notification Templates (SM204003) form to create your own templates
- Use Event Setup (EP204070) form to configure templates you want to use for invitation, reschedule, and cancellation
- Use Automation Notifications (SM205040) form to create notification related to changes on specific data entry forms
  - You can also access it from the form's title bar by clicking **Notifications** button
  - Ensure Change Notification feature is enabled
  - Use Send Notifications (SM205050) form to view generated notification emails

## Lesson 4: Adding Attributes and User-Defined Fields

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In this lesson, you will learn how to define attributes for entities that are created and edited on data entry forms. You will also learn how to add user-defined fields to forms that do not have built-in attributes.

- Use Attributes (CS205000) form to create required attributes
- Assign set of attributes to an entity class, assign class to the entity record.
  - E.g. if you wanted to gather additional employee information, you define the appropriate attributes for the employee class on the Employee Classes (EP202000) form, and the specific attributes defined for the employee class can be entered and viewed on the Employees (EP203000) form
- Use Customization menu to add attributes as custom fields for forms that don't support built-in attribute functionality

## Lesson 5: Securing Multiple Branches

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In this lesson, you will learn how to create a branch-specific role, and how to create users and assign them to branches in Acumatica ERP.

- Ensure Multi-Branch Support feature is enabled
- Use User Roles (SM201005) form to create role for each branch and add users that require access as members
- Use Branches (CS102000) form to tie role to a branch

# Restriction Groups

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A restriction group is a set of entities of two or more types that you define to achieve one of these goals:

- **Control the visibility** of sensitive data for employees(users) of your organization
  - Create restriction groups with users and entity e.g. GL Account
- **To relate entities** to one another so that they are used only together on Acumatica ERP forms (or so that they cannot be used together)



# Restriction Groups (cont.)

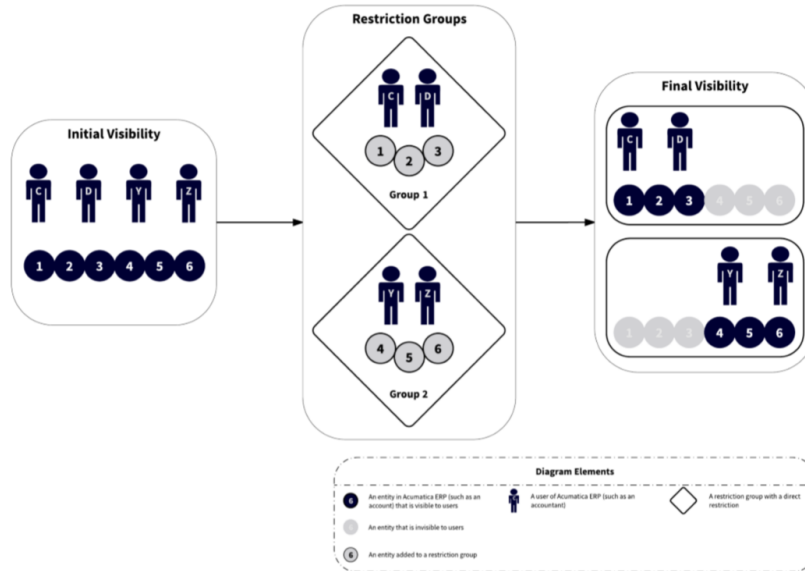
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## Types of Restriction Groups

- Groups with Direct Restriction
  - Type A
  - Type B
- Groups with Inverse Restriction
  - A Inverse
  - B Inverse

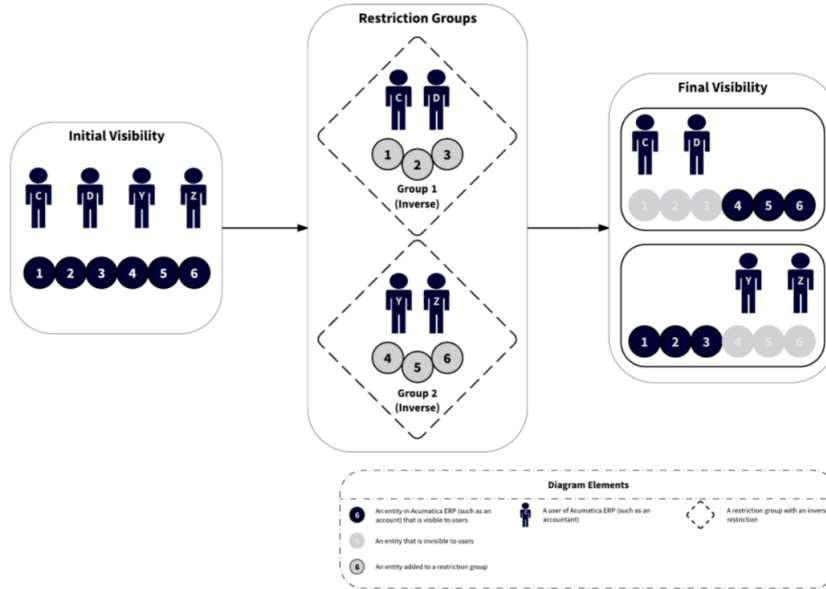
# Restriction Groups (cont.)

## Example of Direct Restriction



# Restriction Groups (cont.)

## Example of Inverse Restriction



# Lesson 6: Configuring Restriction Groups

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In this lesson, you will learn how to use restriction groups in Acumatica ERP to limit users' access to specific stock items.

- Ensure Row-Level Security feature is enabled
- Use configuration screens to create required restriction groups

# Lesson 7: Monitoring Performance

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In this lesson, you will learn how to view and abort running processes and use the Request Profiler in Acumatica ERP

- Use System Monitor (SM201530) form to view, drill-down to and abort running processes
- Use Request Profiler (SM205070) form to check what is going on under the hood.

# Lesson 8: Performing Database Maintenance

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In this lesson, you will learn how to monitor the database size and delete unnecessary entities.

- Use Space Usage (SM203525) form to review tenants, snapshots, and tables that can take most of the database space
- Use Tenants (SM203530) form to delete unnecessary tenants and snapshots

# Lesson 9: Configuring Business Process Monitoring

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In this lesson, you will learn how to monitor changes in business processes and how to configure business process monitoring by a schedule. You will also learn how to send notifications about these events in Acumatica ERP.

- User Business Events (SM302050) form create and maintain business process events.

# Lesson 10: Configuring Acumatica ERP Self-Service Portal

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In this lesson, you will learn how to activate the needed license and specify general settings in the SelfService Portal.

Step 1: Activating the License

Step 2: Specifying the General Settings of Self-Service Portal



# Lesson 11: Managing Access to the Self-Service Portal

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In this lesson, you will learn how to add a user account for your customer and select a default contact class for contacts in Self-Service Portal.

- Ensure following features are enabled:
  - Customer Portal
  - B2B Ordering
  - Case Management on Portal
  - Financials on Portal
- Use User Types (EP202500) form to create portal user type(s) – Contact type
- User Contacts (CR3020PL) substitute form to create Customer Admin portal account

## Lesson 12: Managing Online Orders

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In this lesson, you will learn how to set up defaults for your customers to order online in Self-Service Portal. You also will learn how to manage your online catalog in Acumatica ERP, including adding new item sales categories, organizing categories, deleting items, and adding new inventory items, item descriptions, and images. Also, you will verify that the online catalog is available for a customer using Self-Service Portal.

- User Portal Preferences (SP800000) form to specify the default settings that relate to online ordering
- Use Item Sale Categories (IN204060) form to create and maintain item catalog

# Lesson 13: Managing Cases with Self-Service Portal

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In this lesson, you will learn how to specify the default settings for case management through Self-Service Portal and set up notifications to be sent to personnel in your company if a comment has been added to any case in Self-Service Portal.

- Use Portal Preferences (SP800000) form to specify defaults for case management and select a notification template for sending notifications about new comments in cases

# Survey

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Your Feedback is Important!

<https://www.surveymonkey.com/r/onlinesessions2019>

Thank You!