T400 Basic Customization of the Mobile App

Natesan Sivaramakrishnan

Technical Account Manager

Timing and Agenda

July 26, 2023 -10 AM -11 AM

Day 1

Lesson 1.1: Install the Acumatica Mobile App

Lesson 1.2: Sign Into the Acumatica Mobile App

Lesson 2.1: Explore a WSDL Schema

Lesson 2.2: Add a Screen to the Mobile App

Lesson 3.1: Configure a Dashboard Screen

Lesson 3.2: Map the Inquiry With Tabs

July 27, 2023 -10 AM -11 AM

Day 2

Lesson 3.3: Add a Generic Inquiry Form by Using the Browser Version of Acumatica ERP

Lesson 3.4: Add a KPI Widget

Lesson 4.1: Update a Screen

Lesson 4.2: Configure the Attachment Capabilities of a Screen

Lesson 4.3: Configure the Ability to Enhance and Attach Receipts

Lesson 4.4: Configure a Report

Lesson 4.5: Configure the Signature Capabilities

Lesson 4.6: Map an Action

Acumatica
The Cloud ERP

Part 1: Introduction to the Acumatica Mobile App

Part 2: Tools and Languages

Part 3: Configuration of Dashboards and Generic Inquiries

Part 4: Configuration of the Extended Functionality

Joe Gibbs Racing
Acumatica Partner

Day 1

Lesson 1.1: Install the Acumatica Mobile App

Lesson Objectives

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

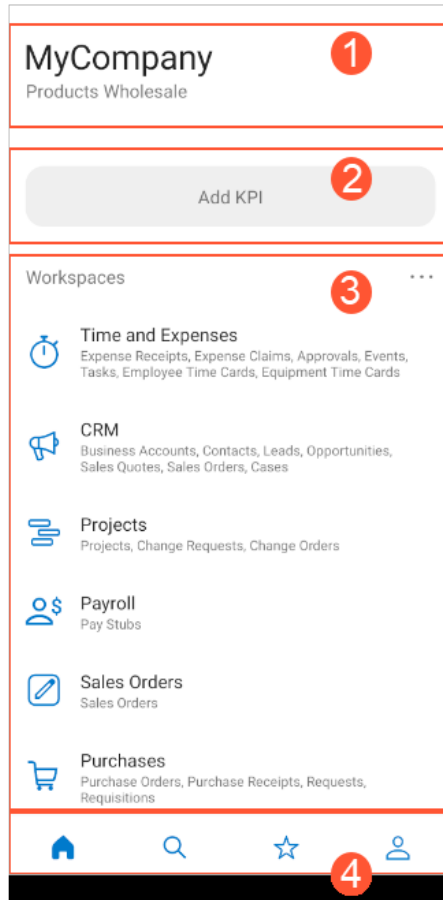• What is required to installed the Acumatica mobile app, and you have downloaded and installed it.

Lesson 1.2: Sign Into the Acumatica Mobile App

Lesson Objectives

In this lesson, you have learnt how to do the following:

- To sign into the mobile app and explored the main parts of the app.

Figure: The Acumatica mobile app main screen

Lesson 2.1: Explore a WSDL Schema

Lesson Objectives

In this lesson, you have learnt how to do the following:

- What a WSDL schema is, and how to view and explore it for an Acumatica ERP form.

Figure: The WSDL Schema of the Sales Activities generic inquiry form

Figure: The Result complex type of the WSDL schema

```xml
▼<s:complexType name="Result">
  ▼<s:sequence>
      <s:element minOccurs="0" maxOccurs="1" name="DisplayName" type="s:string"/>
      <s:element minOccurs="0" maxOccurs="1" name="Selected" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="RowNumber" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="SalespersonID" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Name" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="StartDate" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="EndTime" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="ActivityID" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Subject" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Body" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Status" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Class" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Type" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="NoteText" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="ServiceCommands" type="tns:ResultServiceCommands"/>
  </s:sequence>
</s:complexType>
```

Lesson 2.2: Add a Screen to the Mobile App

Lesson Objectives

In this lesson, you have learnt how to do the following:

- To add the customization project to be used and then perform these actions.

Figure: The Mobile Application page

Figure: The Add Workspace dialog box
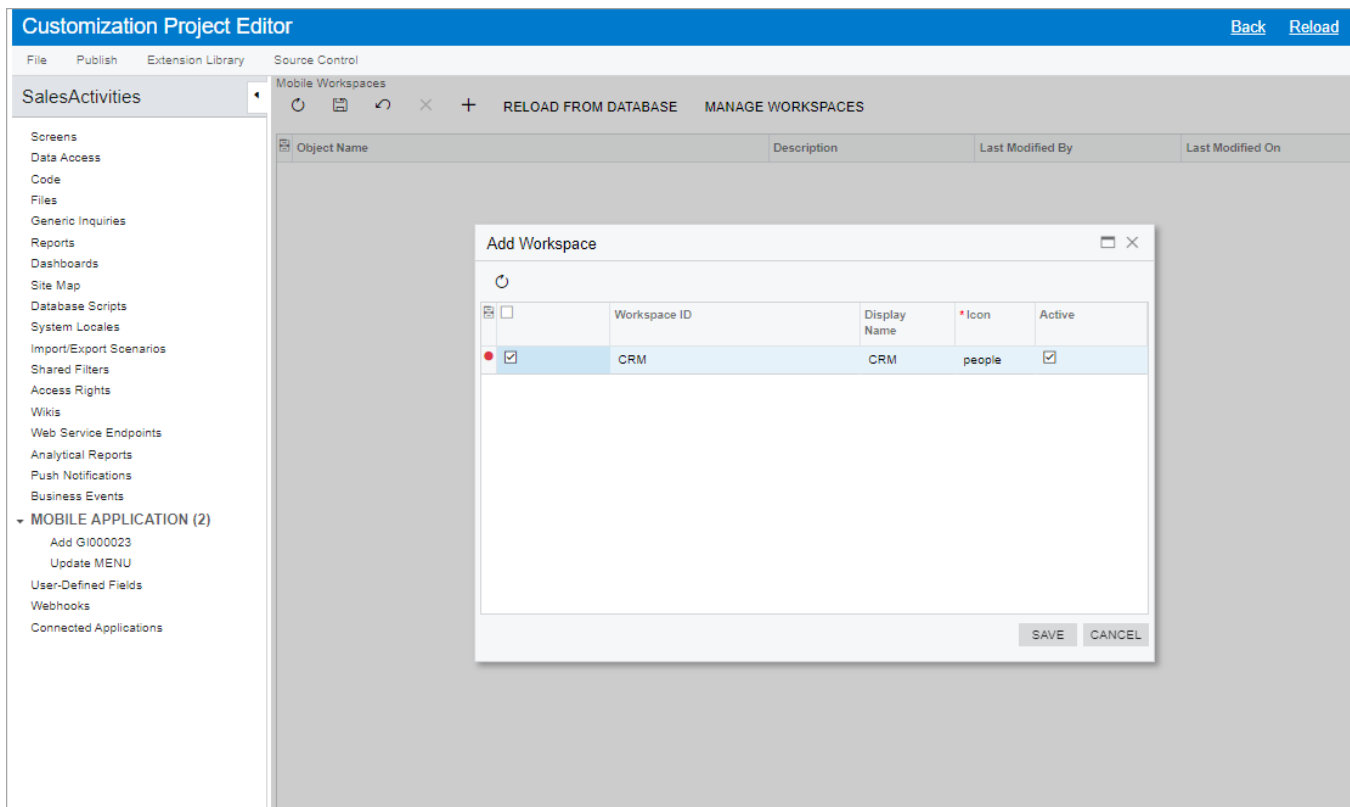
Figure: The CRM workspace
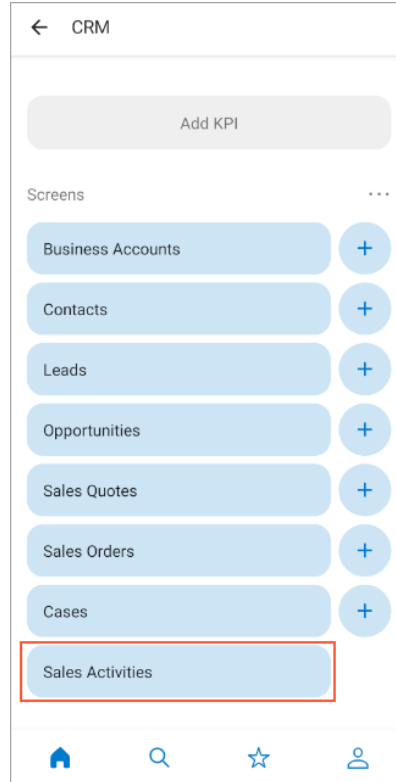
Figure: The Sales Activities screen

Figure: The screen with the details of a record

Lesson 3.1: Configure a Dashboard Screen

Lesson Objectives

In this lesson, you have learnt how to do the following:

• To configure a dashboard screen in the mobile app by using the type property of the screen object. You have added and configured the Sales Operations dashboard screen and learned how to open generic inquiries from the dashboard in the mobile app.

Figure: A generic inquiry without parameters

Figure: A generic inquiry with parameters

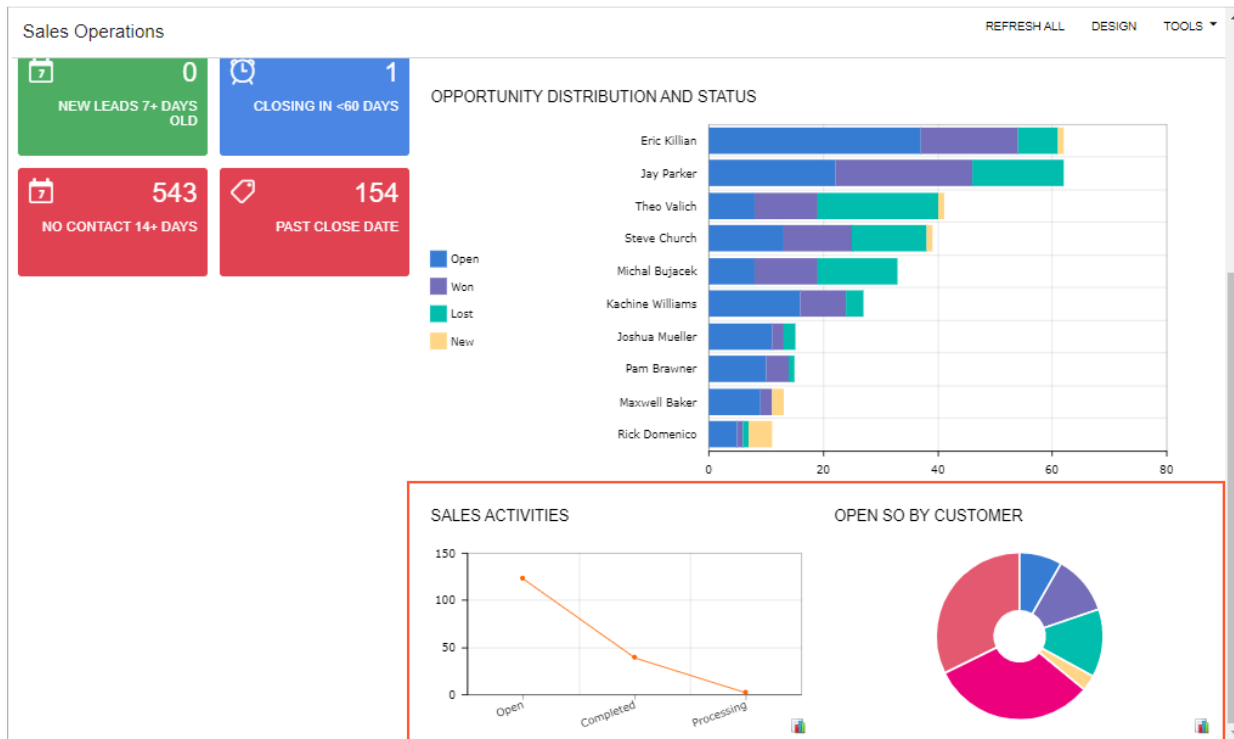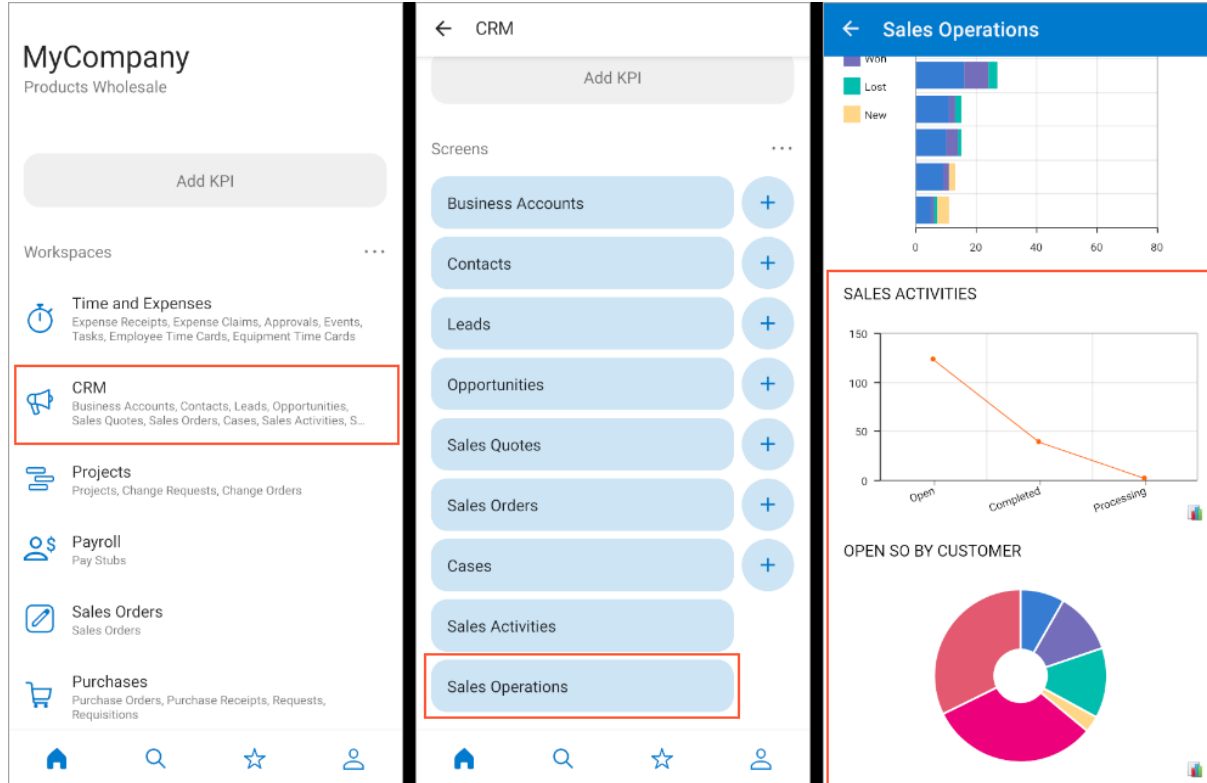# Figure: Added widgets on the Sales Operations dashboard

Figure: Opening the Sales Operations dashboard screen

Lesson 3.2: Map the Inquiry With Tabs

Lesson Objectives

In this lesson, you have learnt how to do the following:

• To map a single generic inquiry that can contain multiple tabs that show the same table but with a built-in filtering.
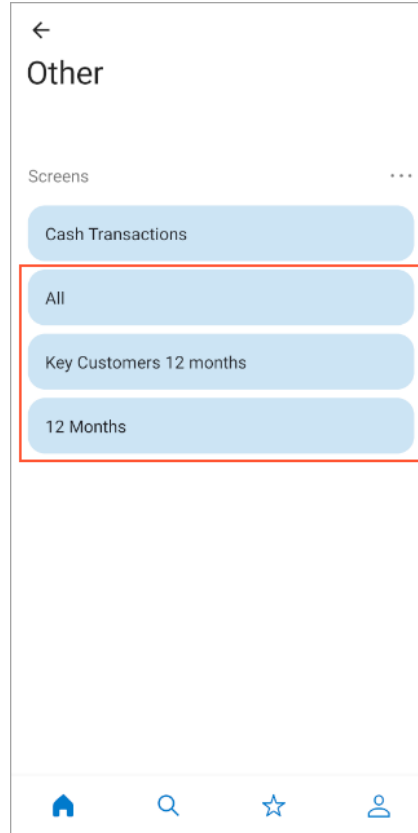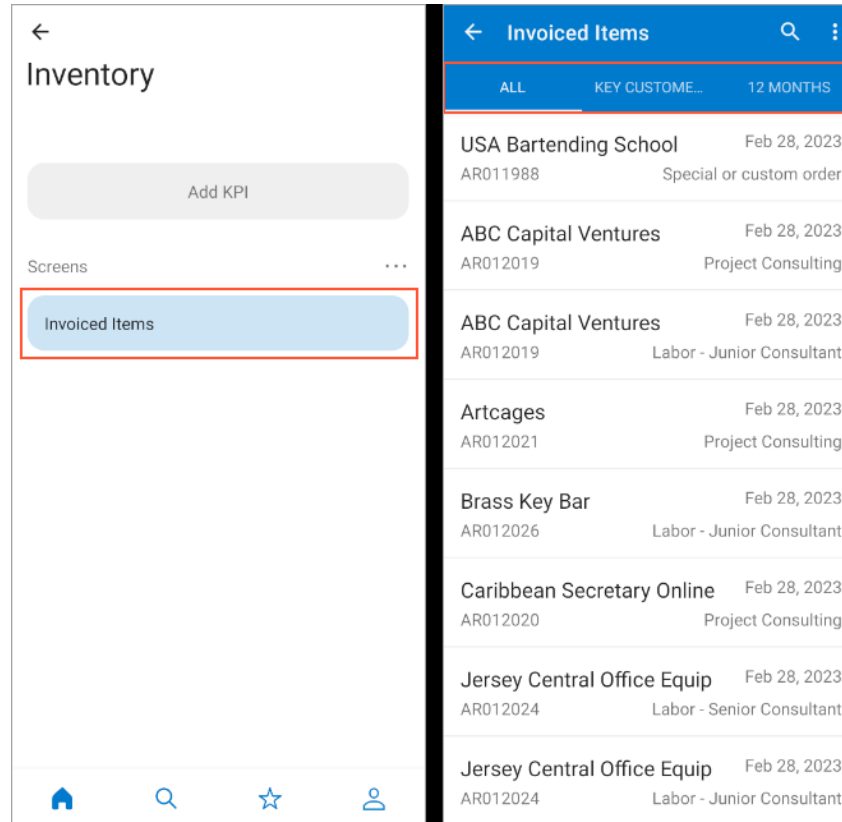
Figure: Tiles of the added inquiry

Figure: The Invoiced Items tile and screen

Day 2

Lesson 3.3: Add a Generic Inquiry Form by Using the Browser Version of Acumatica ERP

Lesson Objectives

In this lesson, you have learnt how to do the following:

- To map an existing generic inquiry form in the instance to the Acumatica mobile app.

- To add a generic inquiry form to the Acumatica mobile app without using a customization project.
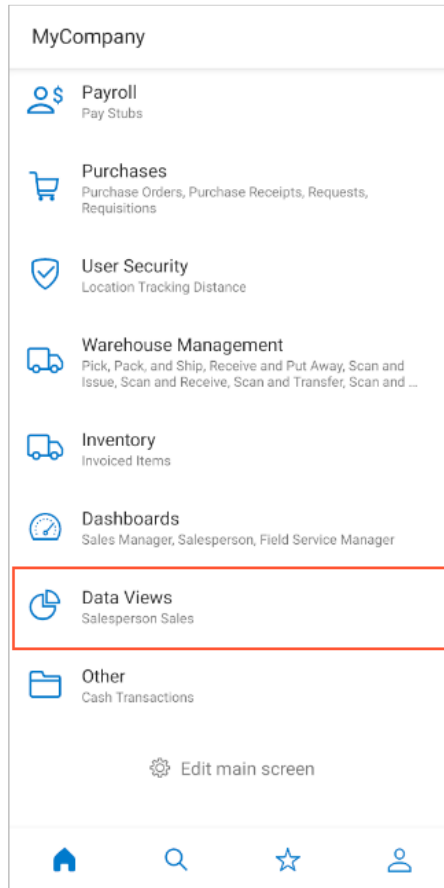
Figure: The Data Views workspace on the main menu
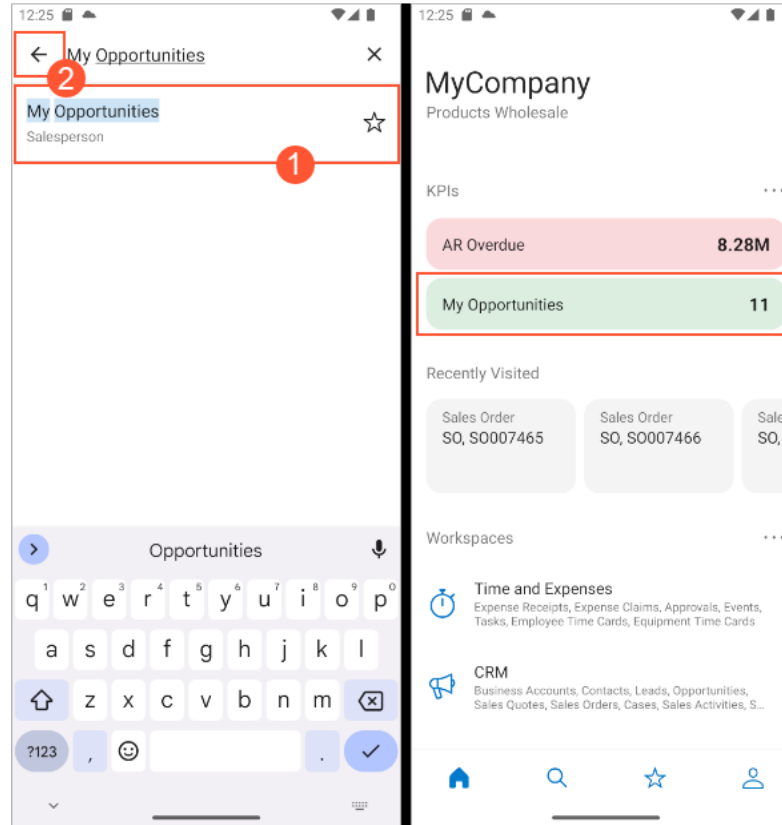
Figure: The Salesperson Sales screen

Lesson 3.4: Add a KPI Widget

Lesson Objectives

In this lesson, you have learnt how to do the following:

• To add the Orders to Ship KPI widget from the Warehouse Manager (IN3015DB) dashboard to the main menu of the mobile app.

Figure: Adding a KPI widget

Lesson 4.1: Update a Screen

Lesson Objectives

In this lesson, you have learnt how to do the following:

- To add, update, and remove different elements of a mobile app screen.

Figure: The Sales Order screen header

Figure: Fields added to the Sales Order screen header

Figure: Part of the WSDL schema of the Sales Orders form

```
▼<s:complexType name="AddressesBillToAddress">
  ▼<s:sequence>
      <s:element minOccurs="0" maxOccurs="1" name="DisplayName" type="s:string"/>
      <s:element minOccurs="0" maxOccurs="1" name="OverrideAddress" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="AddressLine1" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="AddressLine2" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="City" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Country" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="State" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="PostalCode" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="Validated" type="tns:Field"/>
      <s:element minOccurs="0" maxOccurs="1" name="ServiceCommands" type="tns:AddressesBillToAddressServiceCommands"/>
  </s:sequence>
</s:complexType>
```

Lesson 4.2: Configure the Attachment Capabilities of a Screen

Lesson Objectives

In this lesson, you have learnt how to do the following:

- To configure the types of files that can be attached in the mobile app.

Figure: The Attachment button on the Sales Order screen toolbar

Lesson 4.3: Configure the Ability to Enhance and Attach Receipts

Lesson Objectives

In this lesson, you have learnt how to do the following:

- What the enhanced mode of the Acumatica mobile app is and how to configure it in the mobile app.

Figure: The enhancement mode functionality

Lesson 4.4: Configure a Report

Lesson Objectives

In this lesson, you have learnt how to do the following:

• To set up a report corresponding to a screen in the mobile app by mapping an action that generates a report, and mapping the page with the report.

Figure: The Print Sales Order/Quote report

Figure: The Print Sales Order/Quote action in the WSDL schema

```
▼<s:complexType name="Actions">
  ▼<s:sequence>
      <s:element minOccurs="0" maxOccurs="1" name="Save" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="Cancel" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="Insert" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="Delete" type="tns:Action"/>
```

```
      <s:element minOccurs="0" maxOccurs="1" name="CancelOrder" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="ReopenOrder" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="ReleaseFromCreditHold" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="PrintSalesOrder" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="PrintQuote" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="PrintBlanket" type="tns:Action"/>
      <s:element minOccurs="0" maxOccurs="1" name="EmailSalesOrder" type="tns:Action"/>
```

Acumatica
The Cloud ERP

Figure: Opening the Sales Order report

Figure: The PDF version of the report

Lesson 4.5: Configure the Signature Capabilities

Lesson Objectives

In this lesson, you have learnt how to do the following:

• To configure the signature functionality on a mobile screen and use this functionality.

Figure: The Sign menu command

Figure: Creation of a signature

Lesson 4.6: Map an Action

Lesson Objectives

In this lesson, you have learnt how to do the following:

• To use the Customization Project Editor to map an action to a mobile form.

Figure: The Actions Properties dialog box

Figure: The Projects screen menu
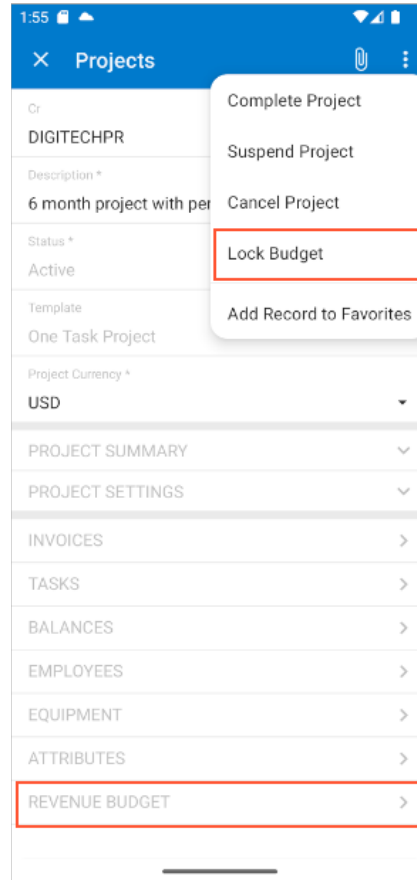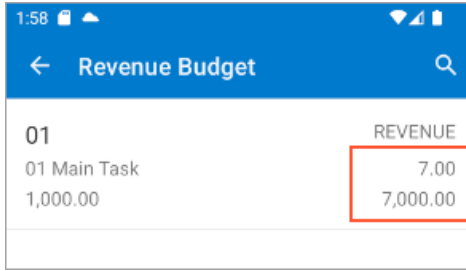
Figure: The Original Budgeted Quantity box, which can be edited

Figure: The settings of the affected line

Figure: The boxes that are unavailable for editing

Thank you!

Natesan Sivaramakrishnan