



T400 Basic Customization of the Mobile App

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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

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Lesson 4.3: Configure the Ability to Enhance and Attach Receipts

Lesson 4.4: Configure a Report

Lesson 4.5: Configure the Signature Capabilities

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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

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.

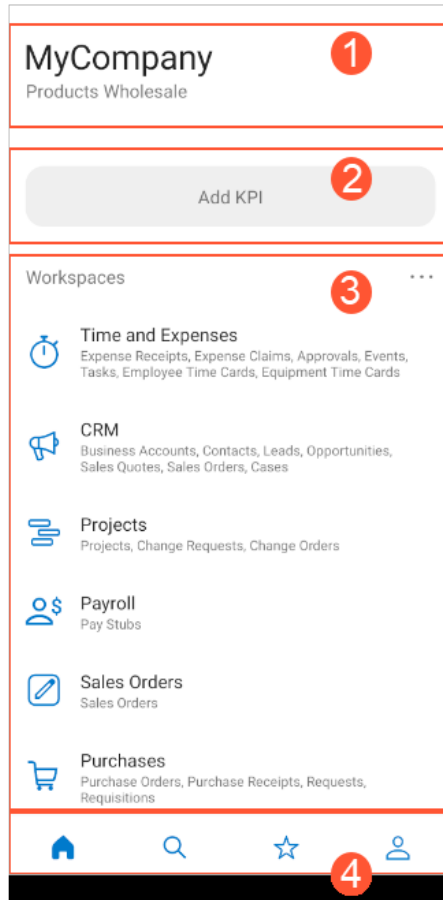
Lesson 1.2: Sign Into the Acumatica Mobile App

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

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8"?>
<wsc:definitions xmlns:s="http://www.w3.org/2001/XMLSchema" xmlns:soap12="http://schemas.xmlsoap.org/wsdl/soap12/"
  xmlns:http="http://schemas.xmlsoap.org/wsdl/http/" xmlns:mime="http://schemas.xmlsoap.org/wsdl/mime/"
  xmlns:tns="http://www.acumatica.com/types/" xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/"
  xmlns:tm="http://microsoft.com/wsdl/mime/textfatching/" xmlns:soapenc="http://schemas.xmlsoap.org/soap/encoding/"
  xmlns:wsc="http://schemas.xmlsoap.org/wsdl/" targetNamespace="http://www.acumatica.com/types/">
  <wsc:types>
    <s:schema elementFormDefault="qualified" targetNamespace="http://www.acumatica.com/types/">
      <s:element name="Clear">
        <s:complexType/>
      </s:element>
      <s:element name="ClearResponse">
        <s:complexType/>
      </s:element>
      <s:element name="GetProcessStatus">
        <s:complexType/>
      </s:element>
      <s:element name="GetProcessStatusResponse">
        <s:complexType/>
      </s:element>
      <s:sequence>
        <s:element minOccurs="0" maxOccurs="1" name="GetProcessStatusResult" type="tns:ProcessResult"/>
      </s:sequence>
    </s:complexType>
  </s:element>
  <s:complexType name="ProcessResult">
    <s:sequence>
      <s:element minOccurs="1" maxOccurs="1" name="Status" type="tns:ProcessStatus"/>
      <s:element minOccurs="1" maxOccurs="1" name="Seconds" type="s:int"/>
      <s:element minOccurs="0" maxOccurs="1" name="Message" type="s:string"/>
    </s:sequence>
  </s:complexType>
  <s:simpleType name="ProcessStatus">
    <s:restriction base="s:string">
      <s:enumeration value="NotExists"/>
      <s:enumeration value="InProgress"/>
      <s:enumeration value="Completed"/>
      <s:enumeration value="Aborted"/>
    </s:restriction>
  </s:simpleType>
  <s:element name="GetScenario">
    <s:complexType/>
  </s:element>
  <s:sequence>
    <s:element minOccurs="0" maxOccurs="1" name="scenario" type="s:string"/>
  </s:sequence>
  </s:complexType>
  <s:element name="GetScenarioResponse">
    <s:complexType/>
  </s:element>
  <s:sequence>
    <s:element minOccurs="0" maxOccurs="1" name="GetScenarioResult" type="tns:ArrayOfCommand"/>
  </s:sequence>
  </s:complexType>
  <s:complexType name="ArrayOfCommand">
    <s:sequence>
      <s:element minOccurs="0" maxOccurs="unbounded" name="Command" nillable="true" type="tns:Command"/>
    </s:sequence>
  </s:complexType>
  <s:complexType name="Command">
    <s:sequence>
      <s:element minOccurs="0" maxOccurs="1" name="FieldName" type="s:string"/>
      <s:element minOccurs="0" maxOccurs="1" name="ObjectName" type="s:string"/>
      <s:element minOccurs="0" maxOccurs="1" name="Value" type="s:string"/>
      <s:element minOccurs="0" maxOccurs="1" default="false" name="Commit" type="s:boolean"/>
    </s:sequence>
  </s:complexType>

```

Figure: The Result complex type of the WSDL schema

```
▼<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

The screenshot displays the 'Customization Project Editor' interface. At the top, a blue header bar contains the title 'Customization Project Editor' and links for 'Back' and 'Reload'. Below the header is a menu bar with 'File', 'Publish', 'Extension Library', and 'Source Control'. A left sidebar lists various project components, with 'SalesActivities' expanded to show a list including 'Screens', 'Data Access', 'Code', 'Files', 'Generic Inquiries', 'Reports', 'Dashboards', 'Site Map', 'Database Scripts', 'System Locales', 'Import/Export Scenarios', 'Shared Filters', 'Access Rights', 'Wikis', 'Web Service Endpoints', 'Analytical Reports', 'Push Notifications', 'Business Events', 'Mobile Application' (highlighted), 'User-Defined Fields', 'Webhooks', and 'Connected Applications'. The main workspace is titled 'Mobile Application' and features a toolbar with icons for refresh, save, undo, close, edit, and actions for updating existing screens, adding new screens, and managing workspaces. Below the toolbar is a table with columns: 'Operation', 'Screen ID', 'Title', 'Last Modified By', and 'Last Modified On'. The table is currently empty, and a message box in the center states 'No records found.' with a document icon and a close button.

Customization Project Editor [Back](#) [Reload](#)

File Publish Extension Library Source Control

SalesActivities Mobile Application

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

UPDATE EXISTING SCREEN ADD NEW SCREEN MANAGE WORKSPACES ...

Operation	Screen ID	Title	Last Modified By	Last Modified On
-----------	-----------	-------	------------------	------------------

No records found.

Figure: The Add Workspace dialog box

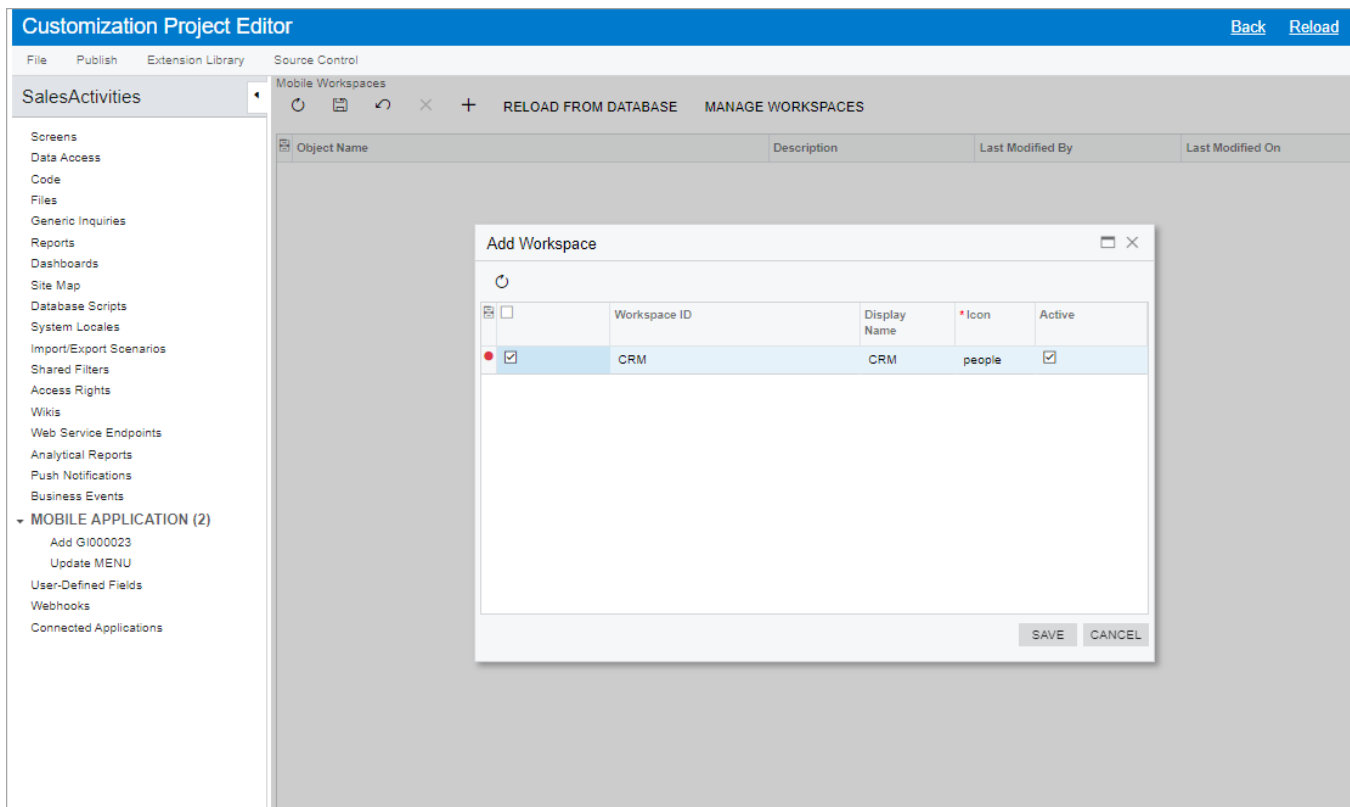


Figure: The CRM workspace

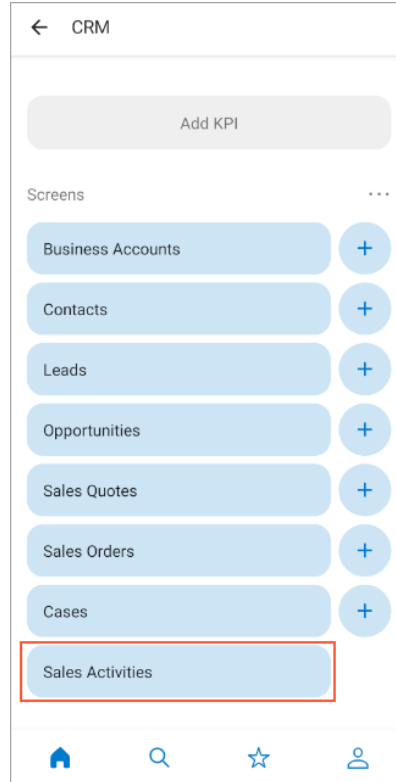


Figure: The Sales Activities screen

Sales Activities	
Jason Mendenhall	Contact Deyo about laptop pricing
Open	Task
Michal Bujacek	Prepare new proposal
Processing	Task
Michal Bujacek	received inbound sales call
Open	Phone Call
Michal Bujacek	Setup project contract with client
Completed	Phone Call
Steve Church	Talk to prospect
Open	Phone Call
Steve Church	Held organizational meeting
Open	Appointment
Steve Church	Follow up on pricing
Open	Chat
Steve Church	Create PPT for decision makers
Open	Work Item

Figure: The screen with the details of a record

×	Sales Activities
Name	Jason Mendenhall
Subject	Contact Deyo about laptop pricing
Status	Open
Type	Task

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

DB Sales Activities CUSTOMIZATION ▾ TOOLS ▾

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Drag column header here to configure filter

		Salesperson ID	Name	Start Date	End Time	Activity ID	Subject	Body	Status	Class	Type
>	📄	SP0001	Jason Mendenhall	3/3/2017 4:00 PM	7/21/2017 5:00 PM	ed8022e2	Contact Deyo about laptop pricing	<HTM...	Open	Task	Task
	📄	SP0002	Michal Bujacek	8/9/2017 5:00 PM	8/16/2017 5:00 PM	d01a3b2c	Prepare new proposal	Prepar...	Processing	Task	Task
	📄	SP0002	Michal Bujacek	3/4/2015 6:22 AM	3/4/2015 6:22 AM	53ee56c3	received inbound sales call	<HTM...	Open	Activity	Phone...
	📄	SP0002	Michal Bujacek	4/1/2017 7:40 PM		bd7e83ad	Setup project contract with client	<HTM...	Completed	Activity	Phone...
	📄	SP0003	Steve Church	3/3/2013 2:55 PM	3/3/2013 2:55 PM	6b1a3b2c	Talk to prospect	Discus...	Open	Activity	Phone...
	📄	SP0003	Steve Church	3/6/2013 2:55 PM	3/6/2013 2:55 PM	6c1a3b2c	Held organizational meeting	Put to...	Open	Activity	Appoi...
	📄	SP0003	Steve Church	3/20/2013 2:55 PM	3/20/2013 2:55 PM	6d1a3b2c	Follow up on pricing	Verifie...	Open	Activity	Chat
	📄	SP0003	Steve Church	3/27/2013 2:55 PM	3/27/2013 2:55 PM	6e1a3b2c	Create PPT for decision makers	PPT n...	Open	Activity	Work I...
	📄	SP0003	Steve Church	3/28/2013 2:55 PM	3/28/2013 2:55 PM	6f1a3b2c	Status update	Team i...	Open	Activity	Note

1-9 of 161 records ⏪ < 1 of 18 pages > ⏩

Figure: A generic inquiry with parameters

Open Sales Orders by Customer

CUSTOMIZATION ▾ TOOLS ▾

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* Date From: 8/9/2015 Customer: 🔍

* Date To: 8/15/2015 ☐ Open Only

Drag column header here to configure filter 🔍

		Date	Customer ID	Customer Name	Order Nbr.	Quantity	Sales Order Total	Status
>	🔍	8/9/2015	INDSUPPLY	Industrial Supply Inc	SO003263	100,634.120000	16,766.99	Completed
	🔍	8/9/2015	SNOSHORT	Shortstop Sports	SO003268	6,970.320000	46,116.00	Completed
	🔍	8/12/2015	ABCSTUDIOS	ABC Studios Inc	SO003272	133.280000	46,924.30	Completed
	🔍	8/12/2015	ELITEANSW	Elite Answering	SO003261	43.520000	11,996.48	Completed
	🔍	8/14/2015	FDIAGRI	Agrilink Food	SO003256	1,288.200000	19,135.92	Completed
	🔍	8/14/2015	BIBIMBAB	Bibimbab Korean Restaurant	SO003269	1,025.200000	4,439.20	Completed

Figure: Added widgets on the Sales Operations dashboard

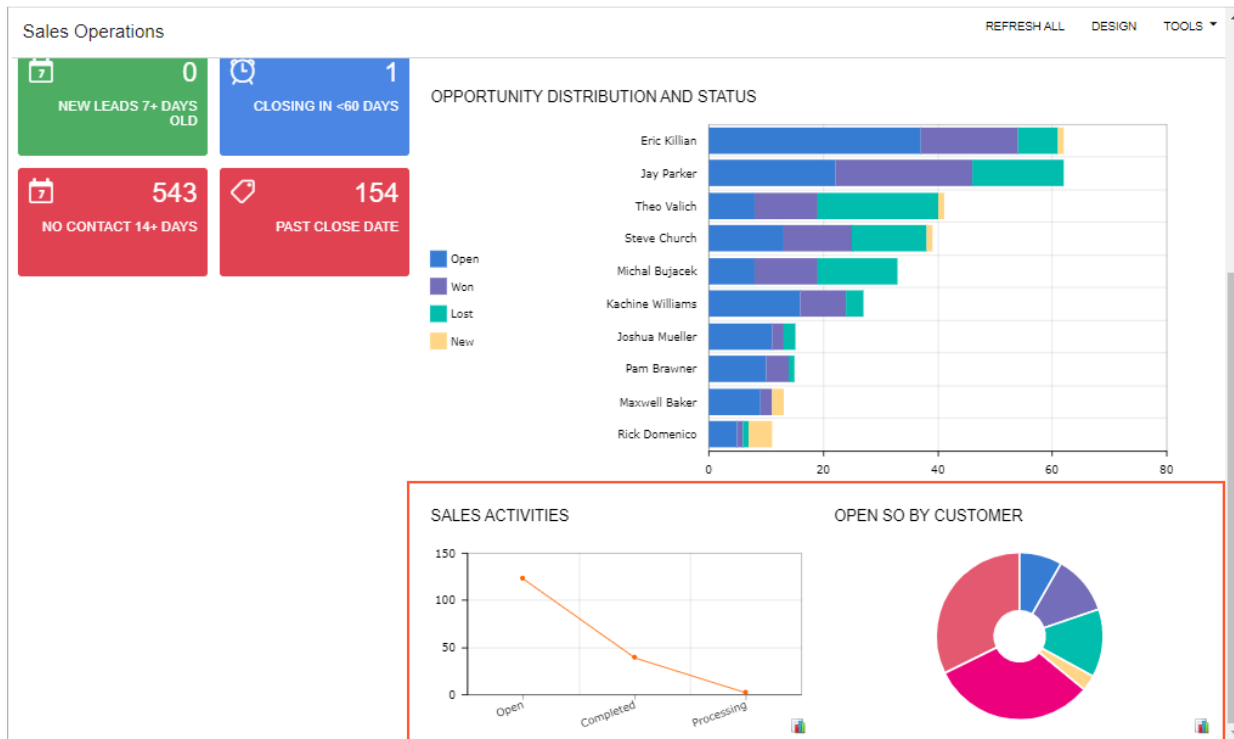
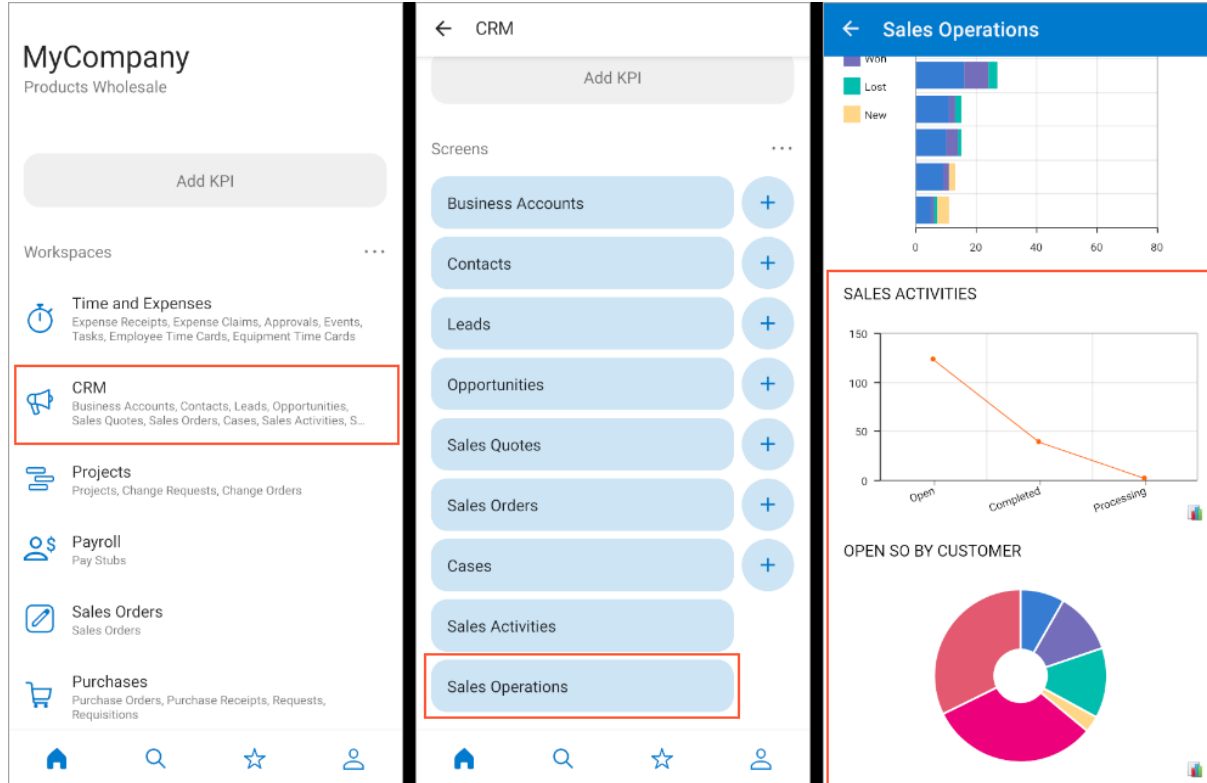


Figure: Opening the Sales Operations dashboard screen



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

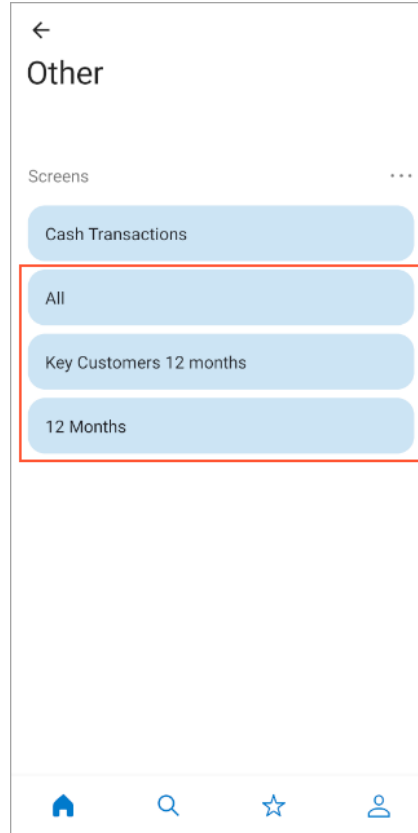
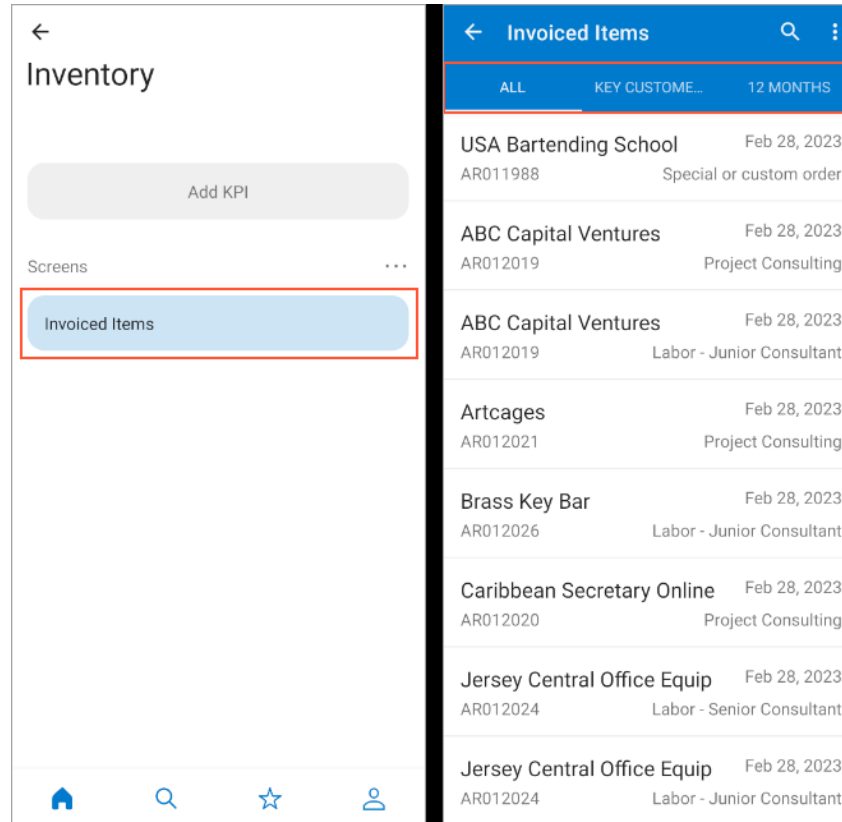


Figure: The Invoiced Items tile and screen



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

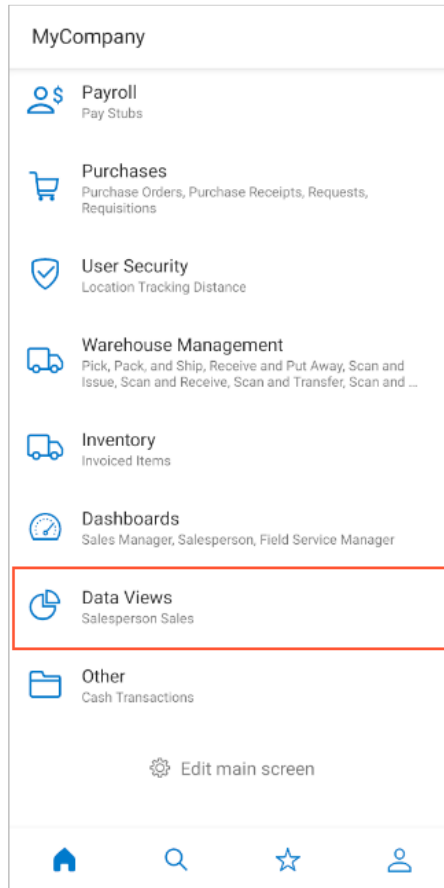


Figure: The Salesperson Sales screen

Salesperson Sales		
SALESPERSON SALES		
Jason Mendenhall	Jason Mendenhall	
Jul 10, 2022		20,000.00
Jason Mendenhall	Jason Mendenhall	
Apr 7, 2022		12,933.00
Jason Mendenhall	Jason Mendenhall	
Apr 25, 2022		4,845.00
Jason Mendenhall	Jason Mendenhall	
Apr 25, 2022		1,400.00
Jason Mendenhall	Jason Mendenhall	
Apr 30, 2022		21,760.00
Jason Mendenhall	Jason Mendenhall	
Apr 30, 2022		18,000.00
Jason Mendenhall	Jason Mendenhall	
May 6, 2022		12,933.00
Jason Mendenhall	Jason Mendenhall	
May 23, 2022		4,370.00

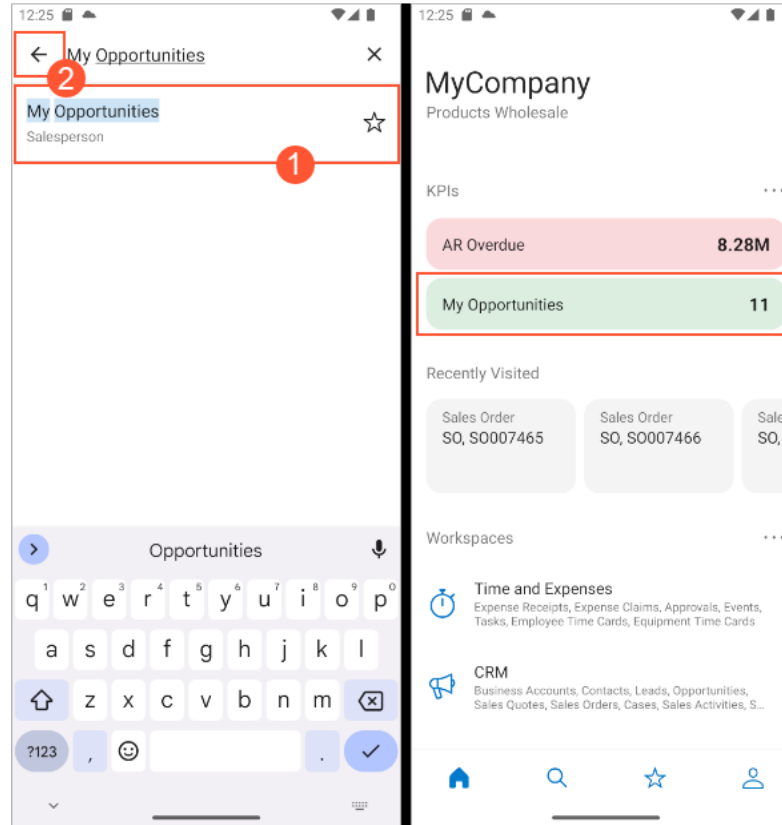
Lesson 3.4: Add a KPI Widget

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

×

Sales Order



Order Mbr.: AR011946

Order Total: 5,000.00

Status: Completed

Discount Total: 0.00

Ordered Qty.: 10.00

Tax Total: 0.00

SUMMARY

DETAILS

SETTINGS

Order Type *

Currency

CS

USD

Date *

Requested On *

Feb 1, 2023

Feb 1, 2023

Customer *

VIDEOCITY - Texas Video City

Location *

MAIN - Primary Location

Contact

Rosario Perez

Description

Warehouse pick up

Notes

SHIPPING

▼

PAYMENT SETTINGS

▼

Figure: Fields added to the Sales Order screen header

× Sales Order 📎 ⋮

Order Nbr.: AR011946	Order Total: 5,000.00
Status: Completed	Discount Total: 0.00
Ordered Qty.: 10.00	Tax Total: 0.00
VAT Exempt Total: 0.00	VAT Taxable Total: 0.00

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

The screenshot displays the Acumatica Sales Order interface. On the left, the 'Sales Orders' sidebar shows the order details for SO SO007462 - Alta Ace. The main menu on the right is open, and the 'Print Sales Order' option is highlighted under the 'Printing and Emailing' section. The right pane shows the 'Sales Order' form with the Acumatica logo and the text 'The Cloud ERP'. The form includes fields for Order No., Order Date, Delivery Date, Customer ID, and Currency. Below these are sections for 'FOR:', 'SHIP TO:', and 'BILL TO:'. The 'FOR:' section lists the company details: Products Wholesale, 11235 SE 6th St, Suite 140, Bellevue, WA, 98004, Phone: 206-555-1212, Web: www.revisiontwo.com. The 'SHIP TO:' and 'BILL TO:' sections list the customer details: Alta Ace, 155 10th Ave, New York NY 10011, United States of America, Attn: Amelia Armstrong. The 'CUSTOMER P.O. NO.' is 30 Days, and the 'CONTACT' is Maxwell Baker, mbaker@revisiontwo.com. The 'SHIP VIA' is FOB POINT. The 'ITEMS' table shows one item: AMKEURIG45, Keurig Model 450, with a quantity of 10.00 EA, a price of 199.00, a discount of 0%, and an extended price of 1,990.00. The bottom status bar indicates 'On Hand 21.00 EA, Available 31.00 EA, Available for Shipping 21.00 EA, Allocated 0.00 EA'.

Sales Orders
SO SO007462 - Alta Ace

Processing
Remove Hold
Hold
Quick Process
Create Shipment
Prepare Invoice
Place on Back Order
Open Order
Complete Order
Cancel Order
Reopen Order
Approval
Remove Credit Hold

Printing and Emailing
Print Sales Order
Email Sales Order

Replenishment
Create Purchase Order
Create Transfer Order

Other
Recalculate Prices
Recalculate External Tax
Copy Order

Sales Order

Order No.: SO007462
Order Date: 8/12/2020
Delivery Date: 10/1/2020
Customer ID: AACUSTOMER
Currency: USD
For: Amelia Armstrong

FOR:
Products Wholesale
11235 SE 6th St
Suite 140
Bellevue, WA, 98004
Phone: 206-555-1212
Web: www.revisiontwo.com

SHIP TO:
Alta Ace
155 10th Ave
New York NY 10011
United States of America
Attn: Amelia Armstrong

BILL TO:
Alta Ace
155 10th Ave
New York NY 10011
United States of America
Attn: Amelia Armstrong

CUSTOMER P.O. NO. 30 Days
CONTACT Maxwell Baker, mbaker@revisiontwo.com

SHIP VIA FOB POINT

NO.	ITEM	QTY.	UOM	PRICE	DISC.	EXTENDED PRICE
1	AMKEURIG45: Keurig Model 450	10.00	EA	199.00	0%	1,990.00

On Hand 21.00 EA, Available 31.00 EA, Available for Shipping 21.00 EA, Allocated 0.00 EA

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"/>
```

Figure: Opening the Sales Order report

[illegible]

Figure: The PDF version of the report

← Sales Order _3_31_2... 🔍 📄 ⋮


Acumatica
The Cloud ERP

Sales Order
Order No.: 0000000000
Order Date: 10/10/2020
Customer ID: ANAC0100000000
Customer: Acumatica
Fax: 800-451-0000

Products Warehouse
12345 St. SE, Ste. 100
Suite 100
Seattle, WA 98104
Phone: 206-000-1234
Web: www.acumatica.com

PO#: 1000000000
Alt. PO#: 1000000000
100 100 Ave
New York NY 10011
United States of America
New York NY 10011
United States of America
New York NY 10011
United States of America
New York NY 10011
United States of America

SHIP TO:
Alt. Ship To:
100 100 Ave
New York NY 10011
United States of America
New York NY 10011
United States of America
New York NY 10011
United States of America
New York NY 10011
United States of America

Bill To:
Alt. Bill To:
100 100 Ave
New York NY 10011
United States of America
New York NY 10011
United States of America
New York NY 10011
United States of America
New York NY 10011
United States of America

CUSTOMER ID NO. TERMS CONTRACT
1000000000 1000000000 1000000000

PO# POINT

NO.	ITEM	QUANTITY	UNIT	PRICE	DISC.	EXTENDED PRICE
1	ANAC0100000000	100	EA	100.00	0%	100.00

Total Weight (Kilograms) 100.00
Total Volume (Cubic Feet) 100.00

Subtotal 100.00
Freight & Insurance 0.00
Less Discounts 0.00
Tax 0.00
Total 100.00

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

The screenshot shows a 'Sales Order' form with a blue header bar. The header bar contains a close icon, the title 'Sales Order', a print icon, and a menu icon. Below the header, the form displays order details: Order Nbr.: S0007462, Status: Open, Ordered Qty.: 10.00, and VAT Exempt Total: 0.00. A 'SUMMARY' tab is selected. The form fields include: Order Type * (SO), Date * (Aug 12, 2020), Customer * (AACUSTOMER - Alta Ace), Location * (MAIN - Primary Location), Contact (Amelia Armstrong), Description (Keurig Order), and Notes. At the bottom, there are expandable sections for SHIPPING and PAYMENT SETTINGS. A context menu is open over the form, listing actions: Hold, Create Payment, Cancel Order, Print Sales Order, Sign (highlighted with a red border), and Add Record to Favorites.

Sales Order

Order Nbr.: S0007462
Status: Open
Ordered Qty.: 10.00
VAT Exempt Total: 0.00

SUMMARY

Order Type *
SO

Date *
Aug 12, 2020

Customer *
AACUSTOMER - Alta Ace

Location *
MAIN - Primary Location

Contact
Amelia Armstrong

Description
Keurig Order

Notes

SHIPPING

PAYMENT SETTINGS

Hold
Create Payment
Cancel Order
Print Sales Order
Sign
Add Record to Favorites

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

Action Properties

Action Name:	lockBudget	Action Type:	Graph Action
Display Name:	Lock Budget	Category:	Budget Operations
Disabled:		Rights to Enable Action:	
Hidden:		Rights to View Action:	
Dialog Box:		<input checked="" type="checkbox"/> Expose to Mobile	
Processing Screen:		Display on Toolbar:	As Configured in Graph
	<input type="checkbox"/> Batch Mode	Connotation:	

FIELD UPDATE ACTION PARAMETERS

⌂	Active	*Field	From Schema	New Value	Status
<p>No records found.</p> <p>Try to modify parameters above to see records here.</p>					

OK CANCEL

Figure: The Projects screen menu

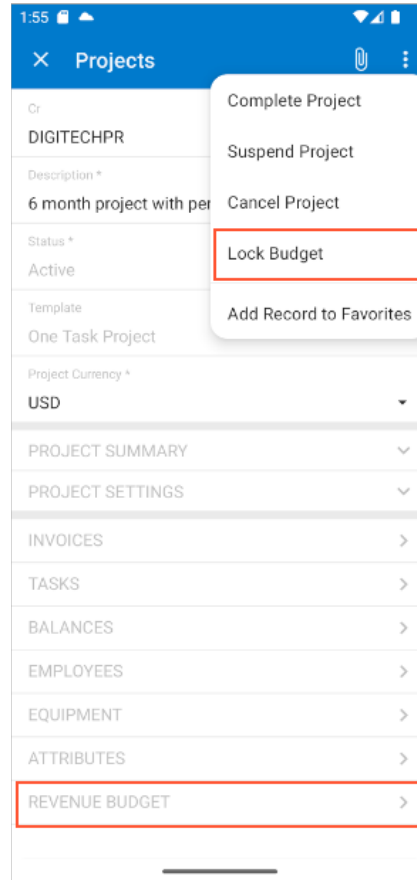
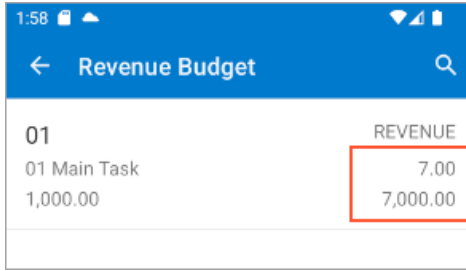


Figure: The Original Budgeted Quantity box, which can be edited

The screenshot shows a mobile application interface for a 'Revenue Budget' form. The form has a blue header with a close button (X) and a title 'Revenue Budget'. Below the header, there are several input fields: 'Project Task *' with a dropdown menu showing '01', 'Account Group *' with a dropdown menu showing 'REVENUE', 'Description' with the text '01 Main Task', 'Original Budgeted Quantity' with a text input field containing '6.00', 'Unit Rate' with a text input field containing '1,000.00', and 'Original Budgeted Amount' with a text input field containing '6,000.00'. A blue cursor is positioned at the end of the 'Original Budgeted Quantity' field, indicating it is being edited. At the bottom of the screen, there is a numeric keypad with buttons for digits 1-9, 0, a decimal point, a comma, a minus sign, a left arrow, a right arrow, and a delete button (X).

Field	Value
Project Task *	01
Account Group *	REVENUE
Description	01 Main Task
Original Budgeted Quantity	6.00
Unit Rate	1,000.00
Original Budgeted Amount	6,000.00

Figure: The settings of the affected line



	REVENUE
01	7.00
01 Main Task	7,000.00
1,000.00	

Figure: The boxes that are unavailable for editing

2:00

Revenue Budget

Project Task *

01

Account Group *

REVENUE

Description

01 Main Task

Original Budgeted Quantity

7.00

Unit Rate

1,000.00

Original Budgeted Amount

7,000.00



Thank you!

Natesan Sivaramakrishnan