



# W140 Customization Projects

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Technical Account Manager

# Timing and Agenda

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**September 6, 2023 -10 AM -11 AM**

**Day 1**

**Lesson 1.1: Create a Customization Project**

**Lesson 2.1: Add a Generic Inquiry to the Customization Project**

**Lesson 2.2: Update a Customization Item**

**Lesson 3.1: Add a Box to a Form**

**September 7, 2023 -10 AM -11 AM**

**Day 2**

**Lesson 3.2: Configure the Layout of a Form**

**Lesson 3.3: Add an Action as a Form Button or Command**

**Lesson 3.4: Configure Conditional Element Properties**

# Timing and Agenda

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**September 8, 2023 -10 AM -11 AM**

**Day 3**

**Lesson 3.5: Add User-Defined Fields**

**Lesson 3.6: Customize Data Access Classes**

**Lesson 4.1: Deploy a Customization Project to a Staging Environment**

**Lesson 4.2: Publish Multiple Customization Projects**

**Lesson 4.3: Publish a Customization Project with the Cleanup Operation**

**Lesson 4.4: Customize a Multitenant Instance**

**Lesson 4.5: Unpublish Customization Projects**



Part 1: Preparing for Customization

Part 2: Customizing Acumatica ERP for Business Process Support

Part 3: Customizing Screens

Part 4: Managing Customization Projects

# Day 1

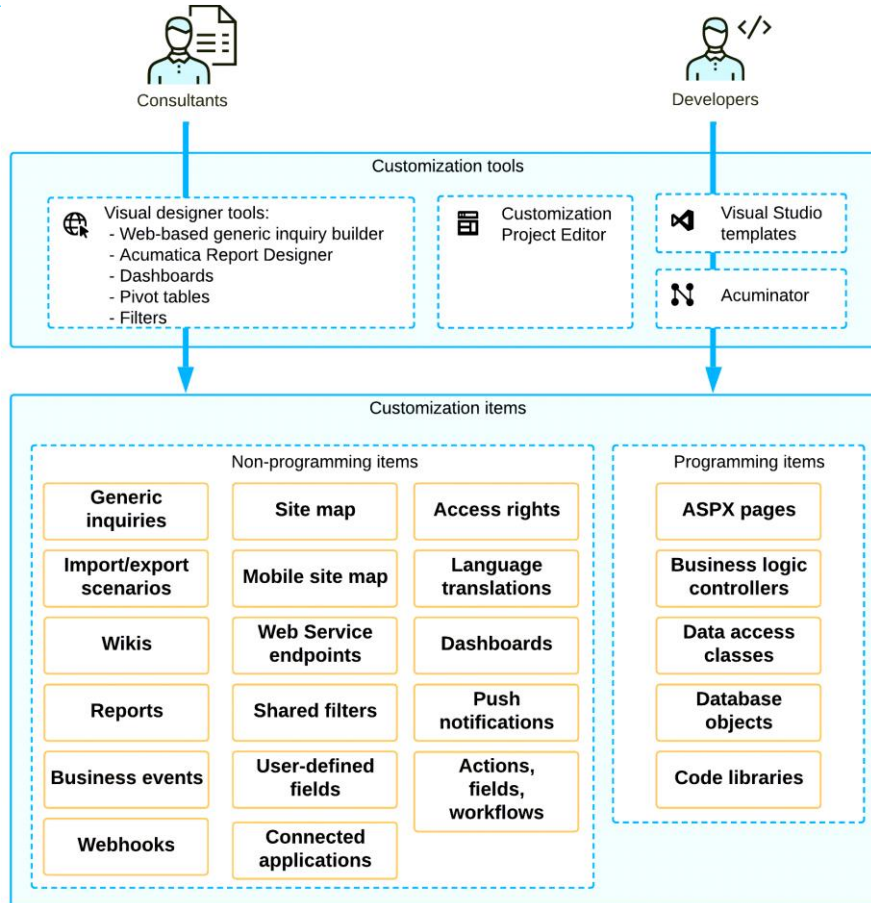
# Company Story and Customization Description

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Suppose that you are an employee of a company that is a partner of Acumatica and develops business solutions for customers. Yogifon, the largest satellite phone operator in the world, has decided to replace its aging ERP system with Acumatica ERP. You are going to customize Acumatica ERP for this customer. Further suppose that you have been assigned the following tasks to implement the customization as follows:

- Customize the Customers (AR303000) form of Acumatica ERP by doing the following:
  - Add a predefined field (AddressType) and a user-defined field (NetworkType)
  - Reorganize the layout on the Financial tab
  - Add an action that opens the Open Sales Orders by Customers (GI400001) generic inquiry form; you will also import the generic inquiry
  - For the new action, add the associated command on the More menu
- Customize the Cases (CR306000) form of Acumatica ERP as follows:
  - Configure conditions for displaying certain actions and fields
  - Add a new tab, and add new boxes to this tab
  - Add a column (Date Reported) to the lookup table of a box (Case ID)
  - Add a predefined field (Time Spent)
  - Add a side panel that displays the contacts of a business account
- Customize the Leads (CR301000) form by configuring conditions for displaying certain actions and fields
- Customize the Sales Orders (SO301000) form by adding an action that generates the Sales Order Details by Customer (SO611000) report; you will also add the associated button on the form toolbar and the command on the More menu
- Add a previously prepared generic inquiry and import scenario to the customization project
- Publish the customization project in the instance of Acumatica ERP in Yogifon's staging environment

# Figure: Customization of Acumatica ERP



# Lesson 1.1: Create a Customization Project

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## Learning Objectives

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

- Create a customization project.



# Lesson Summary

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In this lesson, you have learned:

- About customization projects and created one for the training course.

# Figure: The Customization Project Editor webpage

The screenshot displays the 'Customization Project Editor' interface. At the top, there is a blue header with the title 'Customization Project Editor' and navigation links for 'Back' and 'Reload'. Below the header is a menu bar with 'File', 'Publish', 'Extension Library', and 'Source Control'. A red circle '1' highlights the 'Source Control' menu item.

On the left side, there is a sidebar for 'Yogifon' with a list of categories. The 'Screens' category is selected and highlighted with a red circle '2'. Other categories include 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, and Connected Applications.

The main content area is titled 'Customized Screens' and contains a toolbar with icons for refresh, save, undo, close, add, and edit. It also has two buttons: 'CREATE NEW SCREEN' and 'CUSTOMIZE EXISTING SCREEN'. Below the toolbar is a table with the following columns: 'Screen ID', 'Title', 'Is New', 'Last Modified By', and 'Last Modified On'. A red circle '3' highlights the table area, which currently contains no records. A message box in the center of the table states 'No records found.' with a document icon and a close button.

# Lesson 2.1: Add a Generic Inquiry to the Customization Project

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## Learning Objectives

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

- Add a generic inquiry to a customization project.

## Figure: Selection of the SO-OpenByCustomer inquiry

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Add Generic Inquiries ☐ ✕

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<input type="checkbox"/>	*Inquiry Title	Last Modified By	LastModified
<input type="checkbox"/>	Customer Contacts	admin ...	10/29/2022
<input type="checkbox"/>	Item Availability Data	admin ...	10/21/2022
<input type="checkbox"/>	Modified Stock Items	admin ...	10/19/2022
<input checked="" type="checkbox"/>	SO-OpenByCustomer	admin ...	3/28/2023
<input type="checkbox"/>	Stock Item Attachments	admin ...	12/31/2022
<input type="checkbox"/>	Stock Items: Last Modified Date	admin ...	12/31/2022

# Figure: The SO-OpenByCustomer generic inquiry as a customization item

The screenshot displays the 'Customization Project Editor' interface. The top navigation bar includes 'Back' and 'Reload' links. Below the navigation bar, there are tabs for 'File', 'Publish', 'Extension Library', and 'Source Control'. The main content area is titled 'Yogifon' and 'Generic Inquiries'. On the left, a sidebar lists various customization categories, with 'Generic Inquiries (1)' selected. The main area shows a table with the following data:

Object Name	Description	Last Modified By	Last Modified On
> SO-OpenByCustomer		admin admin	3/28/2023

Below the table, there are icons for refresh, save, undo, and close, along with buttons for 'RELOAD FROM DATABASE' and 'MANAGE INQUIRIES'.

# Lesson Summary

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In this lesson, you have learned:

- About adding a generic inquiry to a customization project.

# Figure: The Import and Export Scenarios page

The screenshot shows the 'Customization Project Editor' interface. The top navigation bar includes 'File', 'Publish', 'Extension Library', and 'Source Control'. The main content area is titled 'Import and Export Scenarios' and contains a table with the following data:

Object Name	Description	Last Modified By	Last Modified On
Import GL Transactions		admin admin	3/28/2023

The left sidebar lists various customization categories, with 'Import/Export Scenarios (1)' highlighted. The right sidebar contains icons for refresh, save, undo, close, and add, along with the text 'RELOAD FROM DATABASE' and 'MANAGE SCENARIOS'.

# Lesson 2.2: Update a Customization Item

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## Learning Objectives

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

- Update a generic inquiry item in a customization project.



# Figure: Generic inquiry with the added row

Generic Inquiry ★

NOTES FILES CUSTOMIZATION TOOLS

VIEW INQUIRY

\* Inquiry Title: SO-OpenByCustomer    
 Site Map Title: Open Sales Orders by Customer   
 Workspace: Data Views    
 Category: Inquiries    
 Screen ID: GI400001

Make Visible on the UI  
 Show Deleted Records  
 Show Archived Records  
 Expose via OData  
 Expose to the Mobile Application

Arrange Parameters in:  columns  
 Select Top:  records  
 Records per Page:  Records  
 Export Top:  Records  
 Attach Notes To:

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER RESULTS GRID ENTRY POINT NAVIGATION

Row Style:

🔄 + × ↔ ☒

🔍	🔗	📄	Active	Object	Data Field	Schema Field	Width (px)	Style	Visible	Default Navigator	Navigate To
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SOOrder	OrderDate				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer	AcctCD				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer	AcctName				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SOOrder	OrderNbr				<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SOOrder	OrderWeight				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SOOrder	OrderTotal				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SOOrder	Status				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SOOrder	OrderType				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Preview the currently selected inquiry.

## Figure: The generic inquiry form with the added column

Open Sales Orders by Customer CUSTOMIZATION ▾ TOOLS ▾

🔄 ↶ ⏪ ☒

\* Date From:  Customer:

\* Date To:   Open Only

Drag column header here to configure filter

			Date	Customer ID	Customer Name	Order Nbr.	Quantity	Sales Order Total	Status	Order Type
>	🔍	🗑️	10/14/2022	<a href="#">C000000003</a>	Jevy Computers	000010	0.000000	2,480.00	Completed	<a href="#">SO</a>
	🔍	🗑️	10/19/2022	<a href="#">C000000003</a>	Jevy Computers	000008	0.000000	535.00	Completed	<a href="#">SO</a>
	🔍	🗑️	10/21/2022	<a href="#">C000000003</a>	Jevy Computers	000007	0.000000	170.00	Completed	<a href="#">SO</a>
	🔍	🗑️	10/28/2022	<a href="#">C000000008</a>	Digitech Printers	000002	0.000000	125.00	Open	<a href="#">SO</a>
	🔍	🗑️	10/28/2022	<a href="#">C000000008</a>	Digitech Printers	000003	0.000000	415.00	On Hold	<a href="#">SO</a>
	🔍	🗑️	10/28/2022	<a href="#">C000000003</a>	Jevy Computers	000004	0.000000	420.00	Open	<a href="#">SO</a>
	🔍	🗑️	10/28/2022	<a href="#">C000000003</a>	Jevy Computers	000001	0.000000	2,200.00	Shipping	<a href="#">SO</a>
	🔍	🗑️	10/29/2022	<a href="#">C000000003</a>	Jevy Computers	000009	0.000000	50.00	Completed	<a href="#">SO</a>
	🔍	🗑️	10/29/2022	<a href="#">C000000003</a>	Jevy Computers	000005	0.000000	25.00	Completed	<a href="#">SO</a>
	🔍	🗑️	10/29/2022	<a href="#">C000000003</a>	Jevy Computers	000006	0.000000	2,200.00	Open	<a href="#">SO</a>
	🔍	🗑️	10/29/2022	<a href="#">C000000003</a>	Jevy Computers	000011	0.000000	170.00	Completed	<a href="#">SO</a>

# Lesson Summary

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In this lesson, you have learned:

- About updating an item in a customization project and when you should do this.

# Figure: The Screen Editor page for the Customers form

The screenshot shows the 'Customization Project Editor' interface for the 'Customers' form. The top navigation bar includes 'File', 'Publish', 'Extension Library', and 'Source Control'. The main workspace is titled 'Screen Editor: AR303000 (Customers)'. The left sidebar shows a tree view of the project structure, with 'Dialogs' highlighted. The right-hand properties panel is open to the 'LAYOUT PROPERTIES' tab, showing a table of properties for the selected element.

Override	Property	Value
<input type="checkbox"/>	<b>Base Properties</b>	
<input type="checkbox"/>	ID	ds
<input type="checkbox"/>	PageLoadBehavior	
<input type="checkbox"/>	PrimaryView	BAccount
<input type="checkbox"/>	TypeName	PX.Objects.AR.Customer...
<input type="checkbox"/>	Visible	True
<input type="checkbox"/>	<b>Ext Properties</b>	
<input type="checkbox"/>	AttributesFound	
<input type="checkbox"/>	ClientEvents	
<input type="checkbox"/>	EnableAttributes	True
<input type="checkbox"/>	HeaderDescriptionField	
<input type="checkbox"/>	Height	
<input type="checkbox"/>	KeySeparatorChar	
<input type="checkbox"/>	QPToolBar	
<input type="checkbox"/>	ShowProcessInfo	
<input type="checkbox"/>	SkinID	
<input type="checkbox"/>	ToolBarSkin	
<input type="checkbox"/>	UDFTypeField	CustomerClassID
<input type="checkbox"/>	ValidateRequestMode	
<input type="checkbox"/>	ViewStateMode	
<input type="checkbox"/>	Width	100%

# Figure: Control tree of the Customers form

The screenshot displays the Customization Project Editor interface for the 'Customers' form. The left sidebar shows a tree view of the form's structure, with the 'Data Source: CustomerMaint' node highlighted. The main area shows the 'LAYOUT PROPERTIES' tab, which contains a table of properties for the selected data source.

**Control Tree (Left Sidebar):**

- SCREENS
  - Data Access
  - Code
  - Files
  - Generic Inquiries (1)
  - Reports
  - Dashboards
  - Site Map
  - Database Scripts
  - System Locales
  - Import/Export Scenarios (1)
  - Shared Filters
  - Access Rights
  - Wikis
  - Web Service Endpoints
  - Analytical Reports
  - Push Notifications
  - Business Events
  - Mobile Application
  - User-Defined Fields
  - Webhooks
  - Connected Applications

**Layout Properties Table:**

Override	Property	Value
<input type="checkbox"/>	<b>Base Properties</b>	
<input type="checkbox"/>	ID	ds
<input type="checkbox"/>	PageLoadBehavior	
<input type="checkbox"/>	PrimaryView	BAccount
<input type="checkbox"/>	TypeName	PX.Objects.AR.CustomerMaint
<input type="checkbox"/>	Visible	True
<input type="checkbox"/>	<b>Ext Properties</b>	
<input type="checkbox"/>	AttributesFound	
<input type="checkbox"/>	ClientEvents	
<input type="checkbox"/>	EnableAttributes	True
<input type="checkbox"/>	HeaderDescriptionField	
<input type="checkbox"/>	Height	
<input type="checkbox"/>	KeySeparatorChar	

# Lesson 3.1: Add a Box to a Form

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## Learning Objectives

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

- Use the Element Inspector to open a form in the Screen Editor
- Add a field to a form
- Configure the added field's properties in the Screen Editor
- Publish the customization project
- Test the added field

# Figure: The Address Type box on the Customers form

Customers  
C000000001 - Jersey Central Office Equip

NOTES FILES CUSTOMIZATION TOOLS

VIEW ACCOUNT

\* Customer ID: C000000001 - Jersey Central Office E  
\* Customer Status: Active  
\* Customer Class: DEFAULT - Default

Balance: 730.00  
Prepayment Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES

ACCOUNT INFO  
\* Account Name: Jersey Central Office Equip

ACCOUNT ADDRESS  
VIEW ON MAP  
Address Type: Business  
Address Line 1: Business  
Address Line 2: Home  
Other  
City: Johannesburg  
State:  
Postal Code:  
\* Country: ZA - South Africa

PRIMARY CONTACT  
Name: First Name Last Name  
Job Title:  
Email:

Business 1  
Cell

CONTACT PERSONAL DATA PRIVACY  
 Consented to the Processing of Personal Data  
Date of Consent:  
Consent Expires:

ADDITIONAL ACCOUNT INFO  
Business 1 +1 (777) 283-0414  
Business 2  
Fax  
Account Email: jersey-equip@mail.com  
Web:  
Ext Ref Nbr:

ACCOUNT PERSONAL DATA PRIVACY  
 Consented to the Processing of Personal Data  
Date of Consent:  
Consent Expires:

# Figure: The Element Properties dialog box

The image shows a screenshot of a CRM system interface. The main window displays the 'Customers' section for 'C000000001 - Jersey Central Office Equip'. The 'GENERAL' tab is selected, showing account information, address, and contact details. An 'Element Properties' dialog box is open in the foreground, displaying the following fields:

- Control Type: Tab
- Data Class: [Customer](#)
- View Name: CurrentCustomer
- Business Logic: CustomerMaint

At the bottom of the dialog box, there are three buttons: 'CUSTOMIZE', 'ACTIONS', and 'CANCEL'. The 'CUSTOMIZE' button is highlighted with a blue border.

The background interface shows the following details for the customer:

- \* Customer ID: C000000001 - Jersey Central Office E
- \* Customer Status: Active
- \* Customer Class: DEFAULT - Default
- Balance: 730.00
- Prepayment Balance: 0.00
- Account Name: Jersey Central Office Equip
- Address Line 1: 1 De Villiers & Harrison St, 11-th
- City: Johannesburg
- Country: ZA - South Africa
- Business 1: +1 (777) 283-0414
- Account Email: jersey-equip@mail.com
- \* Consented to the Processing of Personal Data:



# Figure: The Screen Editor page for the Customers form

The screenshot displays the 'Customization Project Editor' interface. The top bar includes 'Back' and 'Reload' buttons. Below the bar is a menu with 'File', 'Publish', 'Extension Library', and 'Source Control'. The main area is titled 'Yogifon' and 'Screen Editor: AR303000 (Customers)'. A left sidebar shows a tree view of project components, including 'SCREENS', 'Data Access', 'Code', 'Files', 'Generic Inquiries (1)', 'Reports', 'Dashboards', 'Site Map', 'Database Scripts', 'System Locales', 'Import/Export Scenarios (1)', 'Shared Filters', 'Access Rights', 'Wikis', 'Web Service Endpoints', 'Analytical Reports', 'Push Notifications', 'Business Events', 'Mobile Application', 'User-Defined Fields', 'Webhooks', and 'Connected Applications'. The central workspace shows a table of properties for the 'CurrentCustomer' tab. The table has columns for 'Override', 'Property', and 'Value'. The 'Base Properties' section includes 'AutoSize', 'BindingContext', 'DataMember' (with value 'CurrentCustomer'), 'EnableExp', 'Height' (580px), 'ID' (tab), 'TabIndex', and 'Width' (100%). The 'Ext Properties' section includes 'ActivityIndicator', 'AllowCollapse', 'CallbackCommands', 'ClientEvents', 'ClientIDMode', 'DataSourceID' (ds), and 'DefaultControlID'.

Override	Property	Value
<input type="checkbox"/>	<b>Base Properties</b>	
<input type="checkbox"/>	AutoSize	
<input type="checkbox"/>	BindingContext	
<input type="checkbox"/>	DataMember	CurrentCustomer
<input type="checkbox"/>	EnableExp	
<input type="checkbox"/>	Height	580px
<input type="checkbox"/>	ID	tab
<input type="checkbox"/>	TabIndex	
<input type="checkbox"/>	Width	100%
<input type="checkbox"/>	<b>Ext Properties</b>	
<input type="checkbox"/>	ActivityIndicator	
<input type="checkbox"/>	AllowCollapse	
<input type="checkbox"/>	CallbackCommands	
<input type="checkbox"/>	ClientEvents	
<input type="checkbox"/>	ClientIDMode	
<input type="checkbox"/>	DataSourceID	ds
<input type="checkbox"/>	DefaultControlID	

# Figure: The location of the Account Address section

Customers  
New Record

NOTES FILES CUSTOMIZATION TOOLS ▾

Customer ID: [text input] Balance: 0.00  
Customer Status: Active Prepayment Balance: 0.00  
Customer Class: DEFAULT - Default

**2** GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES >>

ACCOUNT INFO

Account Name: [text input]

**ACCOUNT ADDRESS**

VIEW ON MAP

Address Type: Business  
Address Line 1: [text input]  
Address Line 2: [text input]  
City: [text input]  
State: [text input]  
Postal Code: [text input]  
Country: US - United States of America

PRIMARY CONTACT

Name: First Name Last Name  
Job Title: [text input]  
Email: [text input] [envelope icon]  
Business 1  
Cell

**1** CONTACT PERSONAL DATA PRIVACY

Consented to the Processing of Personal Data  
Date of Consent: [text input]  
Consent Expires: [text input]

ADDITIONAL ACCOUNT INFO

Business 1  
Business 2  
Fax  
Account Email: [text input] [envelope icon]  
Web: [text input] [external link icon]  
Ext Ref Nbr: [text input]

ACCOUNT PERSONAL DATA PRIVACY

**1**  Consented to the Processing of Personal Data  
Date of Consent: [text input]  
Consent Expires: [text input]

# Figure: The Add Data Fields tab

Screen Editor: AR303000 (Customers)

EDIT ASPX PREVIEW CHANGES

DataSource: CustomerMaint  
Form: BAccount  
Tab: CurrentCustomer

General

- Column
  - [Layout Rule]
  - Group
    - Group
      - Form: DefAddress** 1
      - Group
    - Column
- Financial
- Billing
- Shipping
- Balances
- Locations
- Payment Methods
- Contacts
- Salespersons
- Child Accounts
- Attributes
- Activities
- GL Accounts
- Mailing & Printing
- Service Billing
- Compliance
- Dialogs

LAYOUT PROPERTIES ATTRIBUTES EVENTS ADD CONTROLS **ADD DATA FIELDS** VIEW ASPX

Data View: Account Address 2

CREATE CONTROLS NEW FIELD ALL **VISIBLE** 3 CUSTOM

<input type="checkbox"/>	Used	Field Name	Control
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressLine1 (Address Line 1)	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressLine2 (Address Line 2)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	AddressLine3 (Address Line 3)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	AddressType	ComboBox
<input type="checkbox"/>	<input checked="" type="checkbox"/>	City	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CountryID (Country)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	CountryID_Country_description (Country Name)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CountryID_description (Country Name)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID (Created By)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_Creator_displayName (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_Creator_Username (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_description (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	DisplayName (Address)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID (Last Modified By)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_description (Last Modified By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_Modifier_displayName (Last Mo	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_Modifier_Username (Last Modif	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	Latitude	NumberEdit
<input type="checkbox"/>	<input type="checkbox"/>	Longitude	NumberEdit

# Figure: Addition of the AddressType field

Screen Editor: AR303000 (Customers)

EDIT ASPX PREVIEW CHANGES ...

Layout Properties ATTRIBUTES EVENTS ADD CONTROLS **ADD DATA FIELDS** VIEW ASPX

Data View: Account Address

CREATE CONTROLS NEW FIELD ALL **VISIBLE** CUSTOM

<input type="checkbox"/>	Used	Field Name	Control
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressLine1 (Address Line 1)	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressLine2 (Address Line 2)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	AddressLine3 (Address Line 3)	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressType	ComboBox
<input type="checkbox"/>	<input checked="" type="checkbox"/>	City	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CountryID (Country)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	CountryID_Country_description (Country Name)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CountryID_description (Country Name)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID (Created By)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_Creator_displayName (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_Creator_Username (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_description (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	DisplayName (Address)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID (Last Modified By)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_description (Last Modified By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_Modifier_displayName (Last Mo	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_Modifier_Username (Last Modif	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	Latitude	NumberEdit
<input type="checkbox"/>	<input type="checkbox"/>	Longitude	NumberEdit

DataSource: CustomerMaint  
Form: BAccount  
Tab: CurrentCustomer  
General  
Column  
[Layout Rule]  
Group  
Group  
Form: DefAddress  
[Layout Rule]  
Button: btnAddressLookup  
Button: View on Map  
Address Line 1  
Address Line 2  
City  
State  
Postal Code  
Country  
Validated  
AddressType  
Group  
Group  
Column  
Financial  
Billing  
Shipping  
Balances  
Locations  
Payment Methods

# Figure: Placement of the new element in the control tree

Screen Editor: AR303000 (Customers)

EDIT ASPX PREVIEW CHANGES ...

DataSource: CustomerMaint  
Form: BAccount  
Tab: CurrentCustomer

General

- Column
  - [Layout Rule]
  - Group
    - Group
      - Form: DefAddress
        - [Layout Rule]
        - Button: btnAddressLookup
        - Button: View on Map
        - AddressType**
        - Address Line 1
        - Address Line 2
        - City
        - State
        - Postal Code
        - Country
        - Validated

- Group
- Group
- Column
- Financial
- Billing
- Shipping
- Balances
- Locations
- Payment Methods

LAYOUT PROPERTIES ATTRIBUTES EVENTS ADD CONTROLS **ADD DATA FIELDS** VIEW ASPX

Data View: Account Address

CREATE CONTROLS NEW FIELD ALL **VISIBLE** CUSTOM

<input type="checkbox"/>	Used	Field Name	Control
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressLine1 (Address Line 1)	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressLine2 (Address Line 2)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	AddressLine3 (Address Line 3)	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AddressType	ComboBox
<input type="checkbox"/>	<input checked="" type="checkbox"/>	City	TextEdit
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CountryID (Country)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	CountryID_Country_description (Country Name)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CountryID_description (Country Name)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID (Created By)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_Creator_displayName (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_Creator_Username (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	CreatedByID_description (Created By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	DisplayName (Address)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID (Last Modified By)	Selector
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_description (Last Modified By)	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_Modifier_displayName (Last Mo	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	LastModifiedByID_Modifier_Username (Last Modif	TextEdit
<input type="checkbox"/>	<input type="checkbox"/>	Latitude	NumberEdit
<input type="checkbox"/>	<input type="checkbox"/>	Longitude	NumberEdit

## Figure: Add Field dialog box

The 'Add Field' dialog box is shown with the following configuration:

- Container: DefAddress (General -> Account Address)
- DAC: PX.Objects.CR.Address (Address)
- Field Name: AddressType
- Display Name: (empty)

<input type="checkbox"/>	Container	DAC	Field Name	Display Name
<input checked="" type="checkbox"/>	DefAddress	PX.Objects.CR.Address	ADDRESSTYPE	AddressType

Buttons at the bottom: ADD, ADD & CLOSE, CLOSE

# Figure: Fields page of the screen

The screenshot displays the 'Customization Project Editor' interface. The top navigation bar includes 'File', 'Publish', 'Extension Library', and 'Source Control'. The main area is titled 'Yogifon' and shows the 'AR303000 (Customers) Fields' configuration. A table lists the fields, with the 'Display Name' column for the 'ADDRESSSTYPE' field highlighted in red.

Object Name	Field Name	Disabled	Hidden	Required	Display Name	From Schema	Default Value	Status
PX.Objects.CR.Address	ADDRESSSTYPE				Address Type	<input type="checkbox"/>		New

# Lesson Summary

---

In this lesson, you have learned:

- About how to use the Screen Editor page for adding and configuring a field.



## Day 2

# Lesson 3.2: Configure the Layout of a Form

---

## Learning Objectives

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

- Organize the elements on a form by using layout rules.

# Figure: The needed layout of the Financial tab

Customers

C000000001 - Jersey Central Office Equip

NOTES FILES CUSTOMIZATION TOOLS

← ↻ ⏪ ⏩ + 🗑️ 📄 < > >| VIEW ACCOUNT ...

\* Customer ID: C000000001 - Jersey Central Office E  
\* Customer Status: Active  
\* Customer Class: DEFAULT - Default

Balance: 730.00  
Prepayment Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES

**FINANCIAL SETTINGS**

Terms: 30D - Net 30 days  
\* Statement Cycle ID: EOM  
 Auto-Apply Payments  
 Apply Overdue Charges  
 Pay by Line  
Write-Off Limit: 0.00  Enable Write-Offs

**CURRENCY**

Currency ID: USD  Enable Currency Override  
Curr. Rate Type:  Enable Rate Override

**CREDIT VERIFICATION RULES**

Credit Verification: Disabled  
Credit Limit: 0.00  
Credit Days Past Due: 0  
Unreleased Balance: 0.00  
Open Orders Balance: 0.00  
Remaining Credit Limit: 0.00  
First Due Date:

# Figure: Elements of the first Column node

Screen Editor: AR303000 (Customers)

EDIT ASPX PREVIEW CHANGES

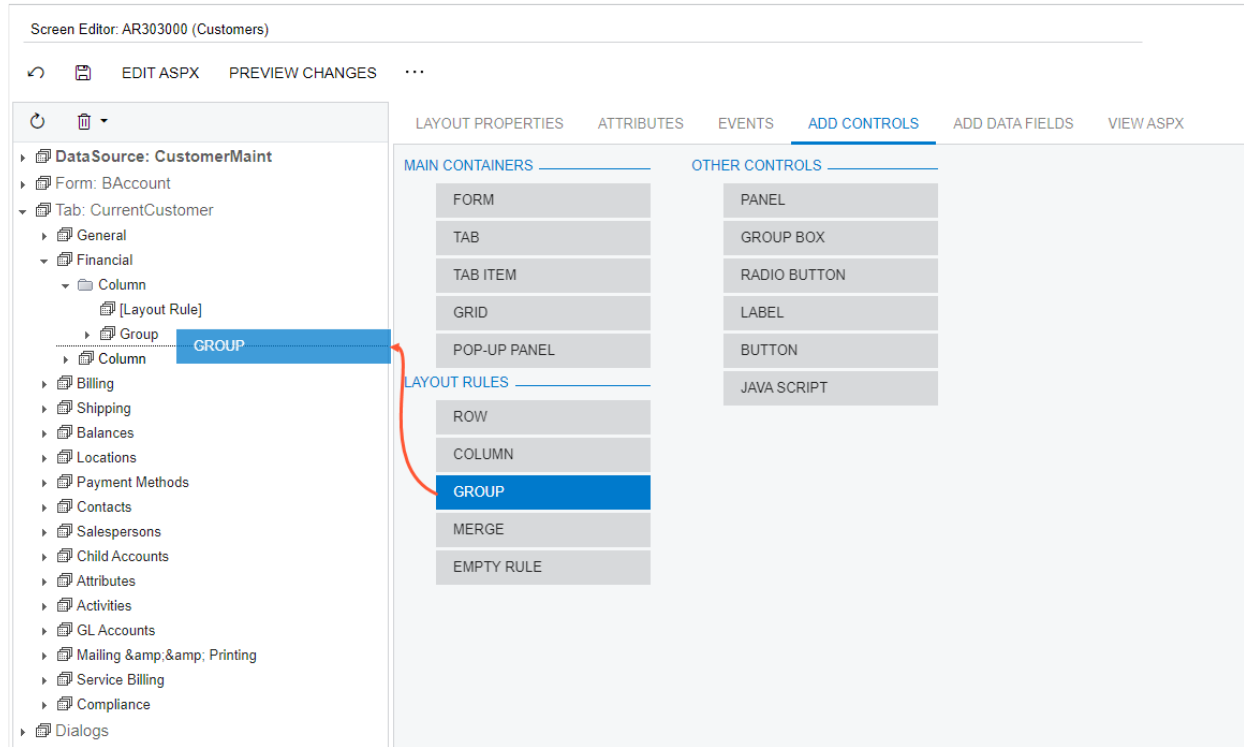
DataSource: CustomerMaint  
Form: BAccount  
Tab: CurrentCustomer

- General
- Financial
  - Column
    - [Layout Rule]
    - Group
      - Terms
      - Statement Cycle ID
      - Restrict Visibility To
      - Auto-Apply Payments
      - Apply Overdue Charges
      - Enable Write-Offs
      - Merge
        - [Layout Rule]
      - Merge
        - [Layout Rule]
      - Merge
        - [Layout Rule]
      - Merge
        - [Layout Rule]
      - Pay by Line
    - Column
  - Billing
  - Shipping
  - Balances
  - Locations
  - Payment Methods
  - Contacts
  - Salespersons

LAYOUT PROPERTIES ATTRIBUTES EVENTS ADD CONTROLS ADD DATA FIELDS VIEW ASPX

Override	Property	Value
<input type="checkbox"/>	<b>Base Properties</b>	
<input type="checkbox"/>	BindingContext	
<input type="checkbox"/>	ContentLayout	
<input type="checkbox"/>	DependsOnView	
<input type="checkbox"/>	LoadOnDemand	
<input type="checkbox"/>	RepaintOnDemand	
<input type="checkbox"/>	Text	Financial
<input type="checkbox"/>	Visible	
<input type="checkbox"/>	VisibleExp	
<input type="checkbox"/>	<b>Ext Properties</b>	
<input type="checkbox"/>	AutoCallBack	

# Figure: The Group element being dragged



# Figure: The relocated elements of the second Group node

Screen Editor: AR303000 (Customers)

EDIT ASPX PREVIEW CHANGES ...

LAYOUT PROPERTIES ATTRIBUTES EVENTS **ADD CONTROLS** ADD DATA FIELDS VIEW ASPX

**MAIN CONTAINERS**

- FORM
- TAB
- TAB ITEM
- GRID
- POP-UP PANEL

**OTHER CONTROLS**

- PANEL
- GROUP BOX
- RADIO BUTTON
- LABEL
- BUTTON
- JAVA SCRIPT

**LAYOUT RULES**

- ROW
- COLUMN
- GROUP
- MERGE
- EMPTY RULE

**Tree View:**

- Financial
  - Column
    - [Layout Rule]
    - Group
      - Terms
      - Statement Cycle ID
      - Restrict Visibility To
      - Auto-Apply Payments
      - Apply Overdue Charges
      - Enable Write-Offs
      - Merge
        - [Layout Rule]
        - Merge
        - [Layout Rule]
        - Merge
        - [Layout Rule]
        - Pay by Line
      - Group (highlighted)
        - Merge
          - Currency ID
          - Enable Currency Override
        - Merge
          - Curr. Rate Type
          - Enable Rate Override
- Column
  - Group
  - Group
- Billing
- Shipping
- Balances

# Figure: The relocated elements of the first Merge node

Screen Editor: AR303000 (Customers)

EDIT ASPX PREVIEW CHANGES ...

Financial

- Column
  - [Layout Rule]
  - Group
    - Terms
    - Statement Cycle ID
    - Restrict Visibility To
    - Auto-Apply Payments
    - Apply Overdue Charges
    - Merge**
      - SmallBalanceLimit\_Label
      - Write-Off Limit
      - Enable Write-Offs
    - [Layout Rule]
    - Merge
    - [Layout Rule]
    - Merge
    - [Layout Rule]
    - Pay by Line
  - Group
    - Merge
      - Currency ID
      - Enable Currency Override
    - Merge
      - Curr. Rate Type
      - Enable Rate Override
  - Column
- Billing

LAYOUT PROPERTIES ATTRIBUTES EVENTS **ADD CONTROLS** ADD DATA FIELDS VIEW ASPX

**MAIN CONTAINERS**

- FORM
- TAB
- TAB ITEM
- GRID
- POP-UP PANEL

**OTHER CONTROLS**

- PANEL
- GROUP BOX
- RADIO BUTTON
- LABEL
- BUTTON
- JAVA SCRIPT

**LAYOUT RULES**

- ROW
- COLUMN
- GROUP
- MERGE
- EMPTY RULE

# Figure: The Financial tab

Company2 NOTES FILES CUSTOMIZATION TOOLS ▾

---

\* Customer ID:  Balance: 0.00  
\* Customer Status: Active Prepayment Balance: 0.00  
\* Customer Class: DEFAULT - Default

GENERAL **FINANCIAL** BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES >>

---

**FINANCIAL SETTINGS**

Terms: 30D - Net 30 days  
\* Statement Cycle ID: EOM  
 Auto-Apply Payments  
 Apply Overdue Charges  
 Pay by Line  
Write-Off Limit: 0.00  Enable Write-Offs

**CURRENCY**

Currency ID:   Enable Currency Override  
Curr. Rate Type:   Enable Rate Override

**CREDIT VERIFICATION RULES**

Credit Verification: Disabled  
Credit Limit: 0.00  
Credit Days Past Due: 0  
Unreleased Balance: 0.00  
Open Orders Balance: 0.00  
Available Credit: 0.00  
First Due Date:



# Lesson Summary

---

In this lesson, you have learned:

- About how to configure the layout of the Financial tab of the Customers (AR303000) form.

# Lesson 3.3: Add an Action as a Form Button or Command

---

## Learning Objectives

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

- Learn how to add an action to a form as a button on the form toolbar and a command on the More menu (under a category)
- Test the buttons and commands associated with the added actions

# Figure: The Action Properties dialog box with the required settings

Action Properties

\* Action Name:  Action Type:

\* Display Name:  Category:

Disabled:  \* Destination Screen:

Hidden:  Window Mode:

Dialog Box:  Rights to Enable Action:

Processing Screen:  Rights to View Action:

Batch Mode  Expose to Mobile

Display on Toolbar:

Connotation:

**NAVIGATION PARAMETERS** FIELD UPDATE

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Active	Parameter Name	Value	From Schema
<input checked="" type="checkbox"/>	Customer (form filter)	[Customer ID]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Date From (form filter)	@YearStart	<input checked="" type="checkbox"/>

OK CANCEL

# Figure: The Open SO by Customer action

The screenshot displays the Acumatica software interface for a customer account. The customer is identified as 'C000000003 - Jevy Computers'. The interface includes a navigation bar with 'NOTES', 'FILES', 'CUSTOMIZATION', and 'TOOLS'. A red box labeled '1' highlights the 'SO OPEN BY CUSTOMER' button in the top right corner. A dropdown menu is open, showing various actions categorized into 'Customer Management', 'Document Processing', 'Statements', and 'Other'. The 'SO Open By Customer' option is highlighted with a red box and a red circle labeled '2'. The background shows the 'ACCOUNT INFO' and 'ACCOUNT ADDRESS' sections, with fields for account name, address, city, state, and country. The 'ACCOUNT PERSONAL DATA PRIVACY' section is also visible at the bottom.

Customers  
C000000003 - Jevy Computers

VIEW ACCOUNT **SO OPEN BY CUSTOMER** ...

\* Customer ID: C000000003 - Jevy Computers Balance: 105,489.00  
\* Customer Status: Active Prepayment Balance: 0.00  
\* Customer Class: DEFAULT - Default

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACT

ACCOUNT INFO  
\* Account Name: Jevy Computers

ACCOUNT ADDRESS  
VIEW ON MAP  
Address Type: Business  
Address Line 1: 1000 Pennsylvania Ave  
Address Line 2:  
City: San Francisco  
State: CA - CALIFORNIA  
Postal Code: 94107-3479  
\* Country: US - United States of America

PRIMARY CONTACT  
Name: First Name  
Job Title:  
Email:  
Business 1  
Cell

CONTACT PERSONAL DATA PRIVACY  
 Consented to the Processing of Personal Data  
Date of Consent:  
Consent Expires:

ADDITIONAL ACCOUNT INFO  
Business 1: +1 (777) 380-0089  
Business 2:  
Fax:  
Account Email: info@jevy-comp.con  
Web:  
Ext Ref Nbr:

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  
**SO Open By Customer**

Reports  
AR Balance by Customer  
AR Register  
Customer History  
AR Aging  
AR Coming Due  
Customer Profile

Consented to the Processing of Personal Data  
Date of Consent:  
Consent Expires:

## Figure: The Action Properties dialog box

Action Properties

\* Action Name:  Action Type:

\* Display Name:  Category:

Disabled:  \* Destination Screen:

Hidden:  Window Mode:

Dialog Box:  Rights to Enable Action:

Processing Screen:  Rights to View Action:

Batch Mode

Expose to Mobile

Display on Toolbar:

Connotation:

NAVIGATION PARAMETERS FIELD UPDATE

🔄 + ×

Active	Parameter Name	Value	From Schema
<input checked="" type="checkbox"/>	Customer ID	[Customer]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Start Date	@YearStart	<input checked="" type="checkbox"/>

OK CANCEL

## Figure: The added Case Side Panel action

Action Properties

\* Action Name:       Action Type:

\* Display Name:       \* Destination Screen:

Icon:

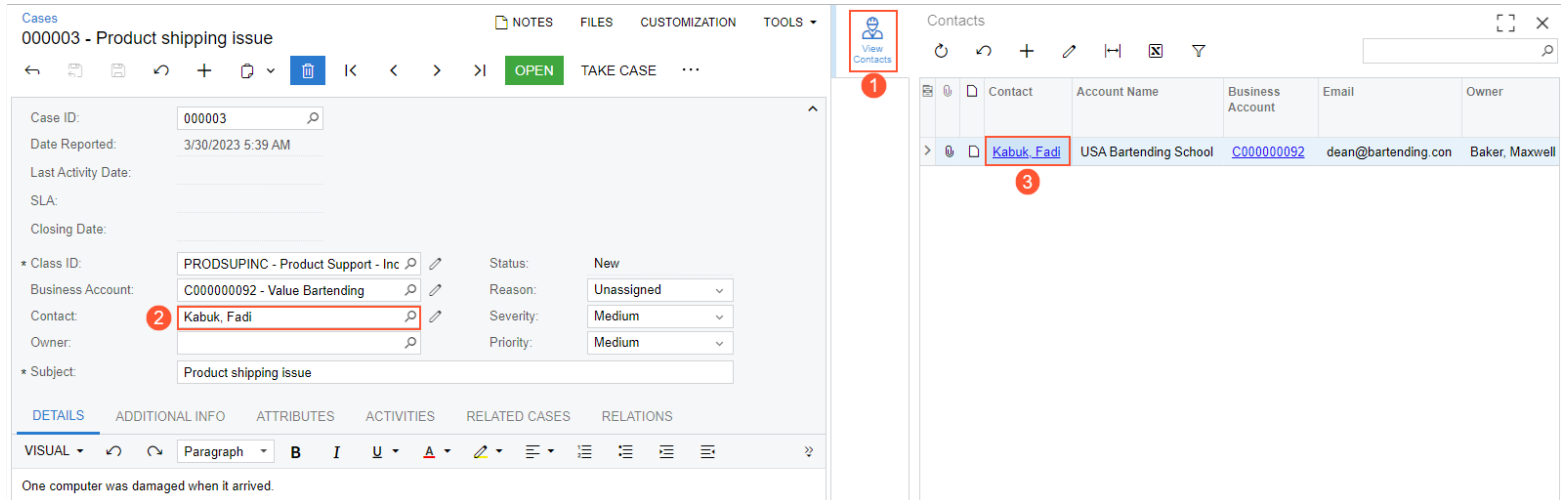
NAVIGATION PARAMETERS

🔄 + ×

Active	Parameter Name	Value	From Schema
> <input checked="" type="checkbox"/>	Business Account	[Business Account]	<input type="checkbox"/>

OK CANCEL

# Figure: The modified Cases form



The screenshot displays the 'Cases' form for '000003 - Product shipping issue'. The form includes fields for Case ID, Date Reported, Last Activity Date, SLA, and Closing Date. It also features dropdown menus for Class ID, Business Account, Contact, Owner, Reason, Severity, and Priority. The subject is 'Product shipping issue'. Below the form is a rich text editor with the text 'One computer was damaged when it arrived.'.

On the right, a 'Contacts' window is open, showing a table of contacts. The contact 'Kabuk, Fadi' is highlighted, and the 'View Contacts' button is also highlighted.

Contact	Account Name	Business Account	Email	Owner
Kabuk, Fadi	USA Bartending School	C000000092	dean@bartending.com	Baker, Maxwell

# Lesson Summary

---

In this lesson, you have learned:

- About types of actions you can add by using the Screen Editor. You have added to the Customers (AR303000) form an action that a user can invoke by clicking a command on the More menu. You have also added to the Sales Orders (SO301000) form an action for which a button appears on the form toolbar in addition to the command on the More menu. You have tested the actions on these forms. You have also added a side panel to the Cases (CR306000) form.



# Lesson 3.4: Configure Conditional Element Properties

---

## Learning Objectives

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

- Define different kinds of conditions on the Conditions page
- Specify conditions for properties of a UI element

## Figure: The properties of the Email element

---

Element Properties ✕

Control Type: Mail Edit

Data Class: [CRLead](#)

Data Field: EMail

View Name: LeadCurrent

Business Logic: LeadMaint

# Figure: The Conditions page

The screenshot shows the 'Customization Project Editor' interface. The top navigation bar includes 'File', 'Publish', 'Extension Library', and 'Source Control'. The main content area is titled 'Yogifon' and 'Conditions: CR301000 (Leads)'. A left sidebar lists various customization categories, with 'Conditions' highlighted. The main area contains a table with columns 'Condition Name', 'Expression', and 'Status'. The table is empty, and a message box states 'No records found.' with a document icon and a close button.

Condition Name	Expression	Status
----------------	------------	--------

No records found.

## Figure: The Condition Properties dialog box

Condition Properties

\* Condition Name:

Append System Condition

↻ + ×

Active	Brackets	* Field Name	* Condition	From Schema	Value	Value 2	Brackets	Operator
>	<input checked="" type="checkbox"/>	-	Email	Is Empty	<input checked="" type="checkbox"/>		-	And

OK CANCEL

# Figure: The Actions page

Customization Project Editor Back Reload

File Publish Extension Library Source Control

Yogifon CR301000 (Leads) Actions

↻ 📄 ↶ ✕ + REORDERACTIONS ...

Action Name	Display Name	Action Type	Disabled	Hidden	Dialog Box	Processing Screen	Category	Status
> <a href="#">Accept</a>	Accept	Workflow			FormAccept	CR503020	Processing	Inherited
<a href="#">CheckForDuplicates</a>	Check for Duplicates	Graph Action					Validation	Inherited
<a href="#">CloseAsDuplicate</a>	Close as Duplicate	Graph Action					Validation	Inherited
<a href="#">ConvertToOpportunityAll</a>	Convert to Opportunity	Graph Action					Processing	Inherited
<a href="#">CreateBothContactAndAccount</a>	Create Account	Graph Action					RecordCreation	Inherited
<a href="#">CreateContact</a>	Create Contact	Graph Action					RecordCreation	Inherited
<a href="#">Disqualify</a>	Disqualify	Workflow			FormDisqualify	CR503020	Processing	Inherited
<a href="#">MarkAsConverted</a>	Mark as Converted	Workflow			FormConvert	CR503020	Processing	Inherited
<a href="#">MarkAsValidated</a>	Mark as Validated	Graph Action					Validation	Inherited
<a href="#">NewActivityN_Workflow</a>	Create Note	Graph Action					Activities	Inherited
<a href="#">NewActivityP_Workflow</a>	Create Phone Call	Graph Action					Activities	Inherited
<a href="#">NewMailActivity_Workflow</a>	Create Email	Graph Action					Activities	Inherited
<a href="#">NewTask_Workflow</a>	Create Task	Graph Action					Activities	Inherited
<a href="#">Open</a>	Open	Workflow			FormOpen	CR503020	Processing	Inherited
<a href="#">Qualify</a>	Qualify	Workflow			FormQualify	CR503020	Processing	Inherited
<a href="#">ValidateAddress</a>	Validate Address	Graph Action					Validation	Inherited

## Figure: The Action Properties dialog box

**Action Properties**

Action Name:       Action Type:

Display Name:       Category:

Disabled:       Rights to Enable Action:

Hidden:       Rights to View Action:

Dialog Box:        Expose to Mobile

Processing Screen:       Display on Toolbar:

Batch Mode      Connotation:

**FIELD UPDATE**

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Active	*Field	From Schema	New Value	Status
<input checked="" type="checkbox"/>	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inherited
<input checked="" type="checkbox"/>	Reason	<input type="checkbox"/>	[FormAccept.Reason]	Inherited

OK CANCEL

## Figure: The PriorityOrSeverityHigh condition

Condition Properties

\* Condition Name:

Append System Condition

🔄 + ×

☰ Active	Brac	* Field Name	* Condition	From Schema	Value	Value 2	Brackets	Operator
<input checked="" type="checkbox"/>	-	Priority	Equals	<input checked="" type="checkbox"/>	High		-	Or
>	<input checked="" type="checkbox"/>	-	Severity	Equals	<input checked="" type="checkbox"/>	High	-	And

OK CANCEL

# Figure: The Required property value

The screenshot shows the Customization Project Editor interface. The main window displays the 'CR306000 (Cases) Fields' configuration. A table lists the fields, with the 'OwnerID' field highlighted in red. The 'Required' column for this field is set to 'PriorityOrSeverityHigh'.

Object Name	Field Name	Disabled	Hidden	Required	Display Name	From Schema	Default Value	Status
PX.Objects.CR.CRCCase	OwnerID			PriorityOrSeverityHigh	Owner	<input type="checkbox"/>		New
PX.Objects.CR.CRCCase	RESOLUTION				Reason	<input type="checkbox"/>		Inherited



## Figure: The Closing Date box

Cases

000002 - Statement request

NOTES FILES CUSTOMIZATION TOOLS

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Case ID:	000002	* Class ID:	SERVCONS - Services Consulting	Status:	New
Date Reported:		* Business Account:	C000000002 - Microchip Restaurant	Reason:	Unassigned
Last Activity Date:		Contact:		Severity:	Medium
SLA:		Owner:	Andrews, Michael	Priority:	Medium
Closing Date:		* Subject:	Statement request		

DETAILS ADDITIONAL INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS

VISUAL Paragraph B I U A ✎ ☰ ☷ ☸ ☹ INSERT LAYOUT TABLES

Client requests the account statement

## Figure: The condition

Condition Properties

\* Condition Name:

Append System Condition

↻ + ×

☰	Active	Bracket	* Field Name	* Condition	From Schema	Value	Value 2	Brackets	Operator
>	<input checked="" type="checkbox"/>	-	Source	Equals	<input checked="" type="checkbox"/>	Campaign		-	And

OK CANCEL

# Lesson Summary

---

In this lesson, you have learned:

- About changing the properties of UI elements depending on conditions. You have also learned how to configure simple and complex conditions on the Conditions page of the Customization Project Editor.

## Day 3

# Lesson 3.5: Add User-Defined Fields

---

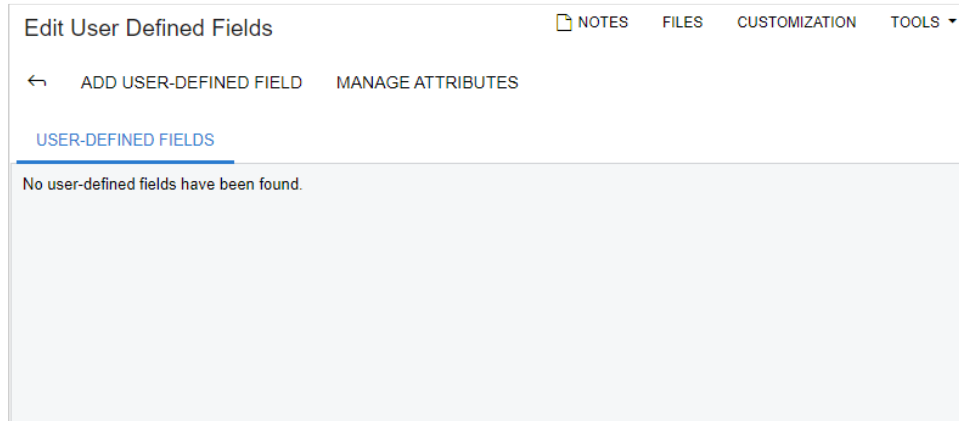
## Learning Objectives

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

- Define an attribute for a user-defined field
- Add the user-defined field to a form
- Add the user-defined field to the customization project

## Figure: The Edit User Defined Fields form

---



Edit User Defined Fields

NOTES FILES CUSTOMIZATION TOOLS ▾

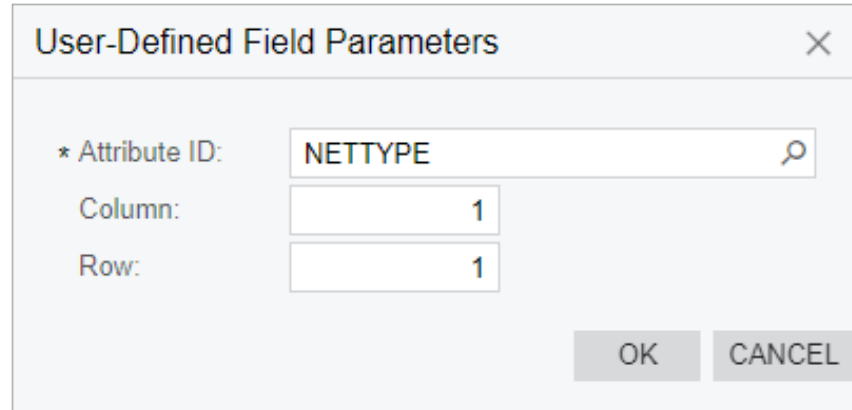
← ADD USER-DEFINED FIELD MANAGE ATTRIBUTES

USER-DEFINED FIELDS

No user-defined fields have been found.

## Figure: The User-Defined Field Parameters dialog box

---



The image shows a dialog box titled "User-Defined Field Parameters" with a close button (X) in the top right corner. The dialog contains three input fields: "Attribute ID" with the value "NETTYPE" and a search icon, "Column" with the value "1", and "Row" with the value "1". At the bottom right, there are "OK" and "CANCEL" buttons.

* Attribute ID:	NETTYPE
Column:	1
Row:	1

OK CANCEL

# Figure: The Network Type box

Customer Locations  
New Record

NOTES FILES CUSTOMIZATION TOOLS

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DOCUMENT **USER-DEFINED FIELDS**

Network Type:

GENERAL SHIPPING GL ACCOUNTS

**LOCATION INFO**

Location Name:

**LOCATION ADDRESS**

Override  
**VIEW ON MAP**

Address Line 1:

Address Line 2:

City:

State:  🔍

Postal Code:

\* Country:  🔍

**ADDITIONAL LOCATION INFO**

Override

Account Name:

Attention:

Email:  ✉️

Web:  🌐

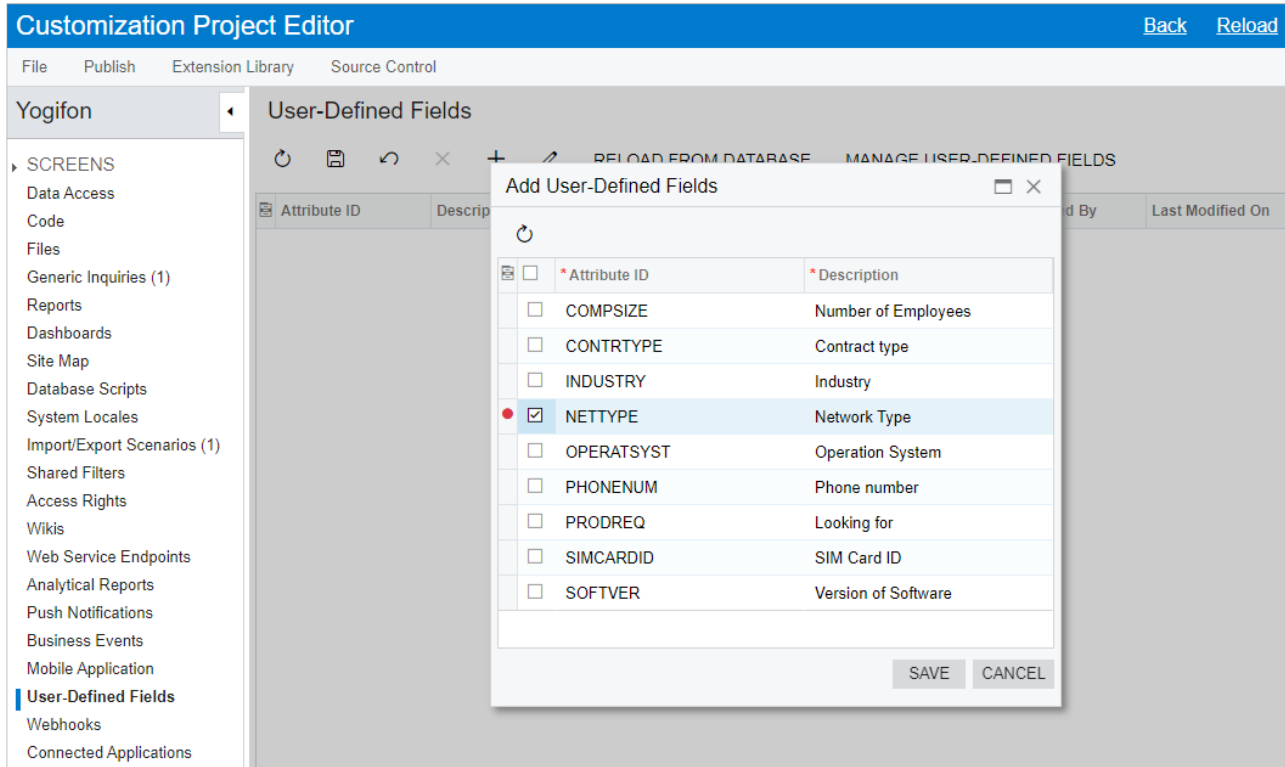
**OTHER SETTINGS**

Default Branch:

Price Class:  🔍



## Figure: The Add User-Defined Fields dialog box



# Lesson Summary

---

In this lesson, you have learned:

- About the use of user-defined fields, and you have added a new user-defined field to a form and to a customization project.

# Lesson 3.6: Customize Data Access Classes

---

## Learning Objectives

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

- Add new elements
- Specify the properties of the added elements

# Figure: The Customize Attributes area with the added attribute

The screenshot displays the 'Customization Project Editor' interface. The top navigation bar includes 'File', 'Publish', 'Extension Library', and 'Source Control'. The main area is titled 'Yogifon' and shows the 'Data Class: CR.CRCASE'. Below this, there are options to 'CREATE NEW FIELD' or 'CHANGE ATTRIBUTES OF BASE FIELD'. The 'UsrCausedBy (New Field)' configuration is shown with the following details:

- Storage Type: DBTableColumn
- BQL Field: CRCASEExt.usrCausedBy

The field definition is shown in a text area with the following code:

```
[PXDBString(1)]  
[PXUIField(DisplayName="Caused By")]  
[PXStringList("D:Device Failure,S:Software Bug,I:Incomplete Documentation")]
```

The third line of the code is highlighted with a red box. Below the field definition, there is a section for 'Original attributes:' which is currently empty.

# Figure: The generated script on the Database Scripts page

The screenshot displays the 'Customization Project Editor' interface. The top navigation bar includes 'Back' and 'Reload' links. Below the navigation bar, there are tabs for 'File', 'Publish', 'Extension Library', and 'Source Control'. The main content area is titled 'Database Scripts' and features a toolbar with icons for refresh, close, edit, 'ADD SCRIPT', 'ADD CUSTOM TABLE SCHEMA', and other actions. A table below the toolbar lists the generated scripts:

Object Name	Type	Priority
> <a href="#">CRCCase</a>	Custom Columns	

The left sidebar contains a tree view of customization categories, with 'Database Scripts (1)' highlighted. Other categories include SCREENS, DATAACCESS, Code, Files, Generic Inquiries (1), Reports, Dashboards, Site Map, System Locales, Import/Export Scenarios (1), Shared Filters, Access Rights, Wikis, Web Service Endpoints, Analytical Reports, Push Notifications, Business Events, Mobile Application, User-Defined Fields (1), Webhooks, and Connected Applications.

## Figure: The added Resolution tab

Cases

000002 - Statement request

NOTES FILES CUSTOMIZATION TOOLS

View Contacts

← 📄 📄 ↶ + 📄 🗑️ ⏪ < > ⏩ OPEN ...

Case ID:	000002	* Class ID:	SERVCONS - Services Consulting	Status:	New
Date Reported:		* Business Account:	C000000002 - Microchip Restaurant	Reason:	Unassigned
Last Activity Date:		Contact:		Severity:	Medium
SLA:		* Owner:	Andrews, Michael	Priority:	High
		* Subject:	Statement request		

DETAILS ADDITIONAL INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS **RESOLUTION** 1

Caused By: [Dropdown] 2

Summary: [Text Area]

## Figure: The added Date Reported column

The screenshot shows the 'New Record' form for 'Cases' in Acumatica. A modal window titled 'Select - Case ID' is open, displaying a table of cases. The 'Date Reported' column in the table is highlighted with a red box, showing dates like '12/14/2022 5:49 A' and '12/31/1899 7:00 P'.

Case ID	Subject	Status	Priority	Severity	Class ID	Active	Business Account Name	Date Reported
000004	Installation consulting	Released	Medium	Medium	SERVCONS	<input type="checkbox"/>	Nautilusscape	12/14/2022 5:49 A
000003	Product shipping issue	Open	Medium	Medium	PRODSUPINC	<input checked="" type="checkbox"/>	Value Bartending	12/7/2022 7:27 AM
000002	Statement request	New	High	Medium	SERVCONS	<input checked="" type="checkbox"/>	Microchip Restaurant	12/31/1899 7:00 P
000001	Billing plan	Open	High	High	SERVCONS	<input checked="" type="checkbox"/>	Jersey Central Office Equip	12/31/1899 7:00 P

# Lesson Summary

---

In this lesson, you have learned:

- About how to create fields and tabs by using the Customized Data Classes and Data Class pages of the Customization Project Editor. You have also learned how to modify the columns in the lookup table.



# Lesson 4.1: Deploy a Customization Project to a Staging Environment

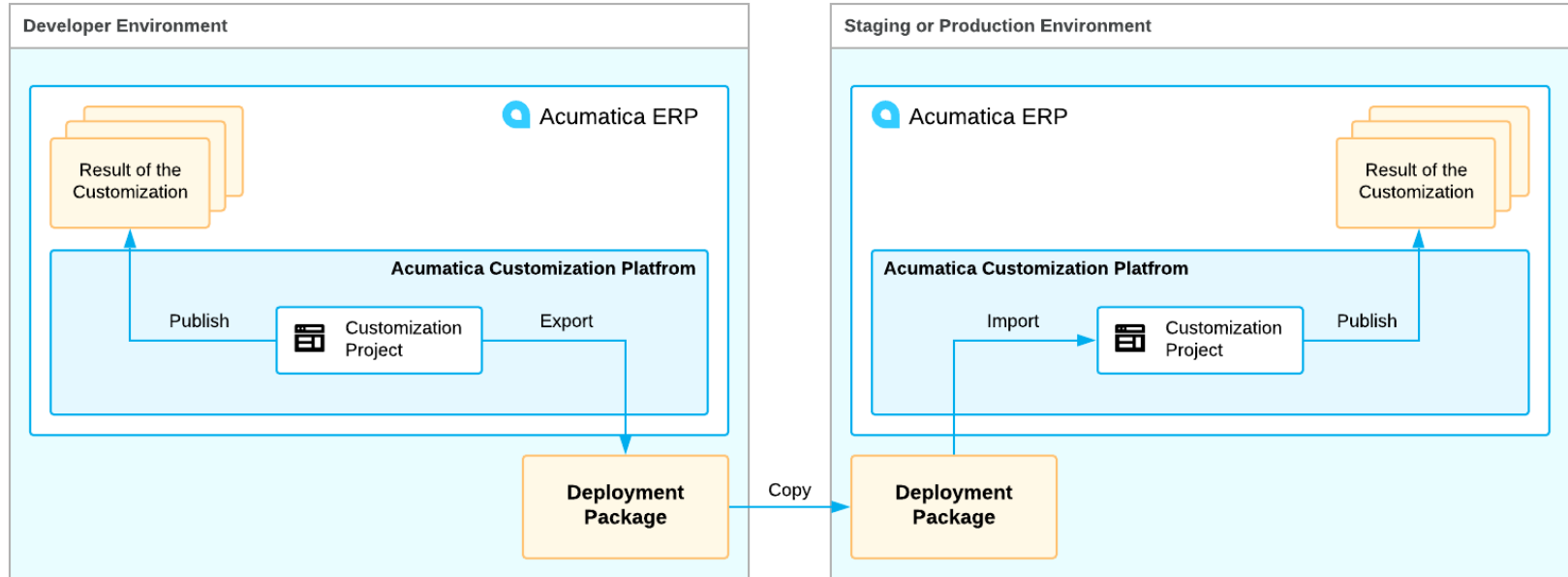
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## Learning Objectives

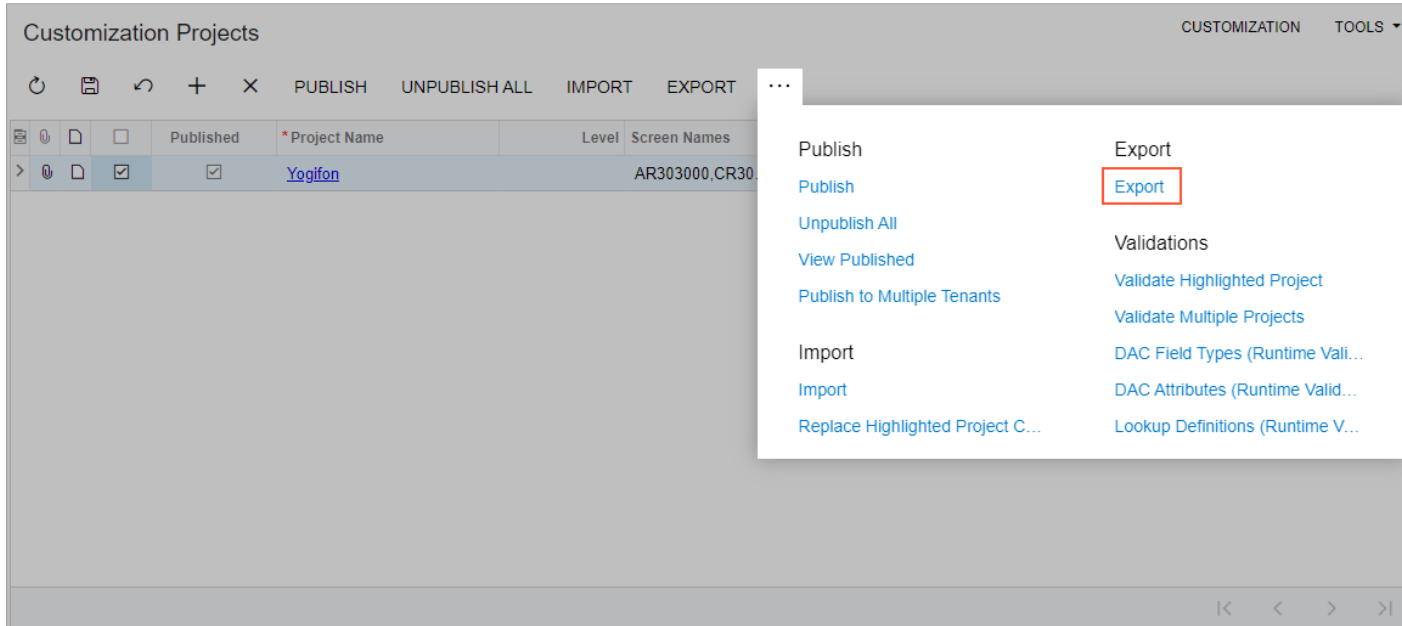
In this lesson, you will learn how to do the following:

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

# Figure: Deployment of the customization project to a target environment



## Figure: The Export command for the Yogifon project



# Lesson Summary

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In this lesson, you have learned:

- About which environments are needed during the resolution of a customization task and what a deployment package is. You have also learned how to export and import a customization project, and how to deploy a customization project from one environment to another.
- During the lesson, you have deployed the Yogifon customization project from the development environment to the staging environment for further testing.

# Lesson 4.2: Publish Multiple Customization Projects

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## Learning Objectives

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

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

# Figure: Preview of the Cases form

Company2

NOTES FILES CUSTOMIZATION TOOLS

View Contacts

Case ID:	<NEW>	* Class ID:		Status:	New
Date Reported:	3/31/2023 2:41 PM	Business Account:		Reason:	Unassigned
Last Activity Date:		Contact:		Severity:	Medium
SLA:		Owner:		Priority:	Medium
		Time Spent:	0 h 00 m		
		* Subject:			

DETAILS ADDITIONAL INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS

VISUAL Paragraph B I U A INSERT LAYOUT TABLES

## Figure: Selection of projects for publication

Customization Projects CUSTOMIZATION TOOLS ▾

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		<input type="checkbox"/>	Published	*Project Name	Level	Screen Names	Description	Initials	Last Modified On	Created By
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Yogifon</a>	1	AR303000,CR301000,CR306000,SO301000			12/8/2022	admin ...
>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">YogifonExtra</a>	2	CR306000			12/8/2022	admin ...

# Figure: Selecting Publish in the Compilation pane

The screenshot displays the 'Customization Projects' window in Acumatica. The interface includes a toolbar with buttons for 'PUBLISH', 'UNPUBLISH ALL', 'IMPORT', and 'EXPORT'. Below the toolbar is a table listing projects. The 'YogifonExtra' project is selected, and a 'Compilation' dialog box is open, showing the output of the compilation process. The 'Publish' button in the dialog is highlighted with a red box, and a warning message is displayed below it.

Published	*Project Name	Level	Screen Names	Description	Initials	Last Modified On	Created By
<input checked="" type="checkbox"/>	Yogifon	1	AR303000,CR301000,CR306000,SO301000			12/8/2022	admin admin
<input type="checkbox"/>	YogifonExtra	2	CR306000			12/8/2022	admin admin

```
[2022-12-08 17:25:45.959] Validating sql scripts
[2022-12-08 17:25:46.542] Validating the website C:\AcumaticaSites\Customization\Yogifon_Staging1\Yogifon_Staging1Validation\Yogifon_Staging1Website
[2022-12-08 17:25:46.542] IIS APPPOOL\DefaultAppPool
[2022-12-08 17:26:03.822] Building directory 'WebSiteValidationDomain\App_RuntimeCode\'.
[2022-12-08 17:26:04.041] Building directory 'WebSiteValidationDomain\Controls\'.
[2022-12-08 17:26:04.248] Building directory 'WebSiteValidationDomain\CstPublished\pages_ar\'.
[2022-12-08 17:26:04.365] Building directory 'WebSiteValidationDomain\CstPublished\pages_cr\'.
[2022-12-08 17:26:12.695] Building directory 'WebSiteValidationDomain\CstPublished\pages_so\'.
[2022-12-08 17:26:12.793] Building directory 'WebSiteValidationDomain\Customization\'.
[2022-12-08 17:26:12.824] Building directory 'WebSiteValidationDomain\ExternalResource\'.
[2022-12-08 17:26:12.902] Building directory 'WebSiteValidationDomain\MasterPages\'.
[2022-12-08 17:26:12.964] Building directory 'WebSiteValidationDomain\Pivot\'.
[2022-12-08 17:26:13.183] Compiler time, in seconds: 26.641378
[2022-12-08 17:26:13.183] Validating graph and cache extensions

Validation finished successfully.

Publish warning. Active website users will be logged out.
```



# Figure: Verification of the customized Cases form

Cases

000002 - Statement request

NOTES FILES CUSTOMIZATION TOOLS

View Contacts

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Case ID:	000002	* Class ID:	SERVCONS - Services Consulting	Status:	New
Date Reported:		* Business Account:	C000000002 - Microchip Restaurant	Reason:	Unassigned
Last Activity Date:		Contact:		Severity:	Medium
SLA:		Owner:	Andrews, Michael	Priority:	Medium
		Time Spent:	0 h 00 m		
		* Subject:	Statement request		

DETAILS ADDITIONAL INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS RESOLUTION

Caused By:

Summary:

# Lesson Summary

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In this lesson, you have learned:

- About creating the YogifonExtra customization project, in which you have customized the Cases (CR306000) form, published the Yogifon and YogifonExtra projects, and tested the customized Cases form.

# Lesson 4.3: Publish a Customization Project with the Cleanup Operation

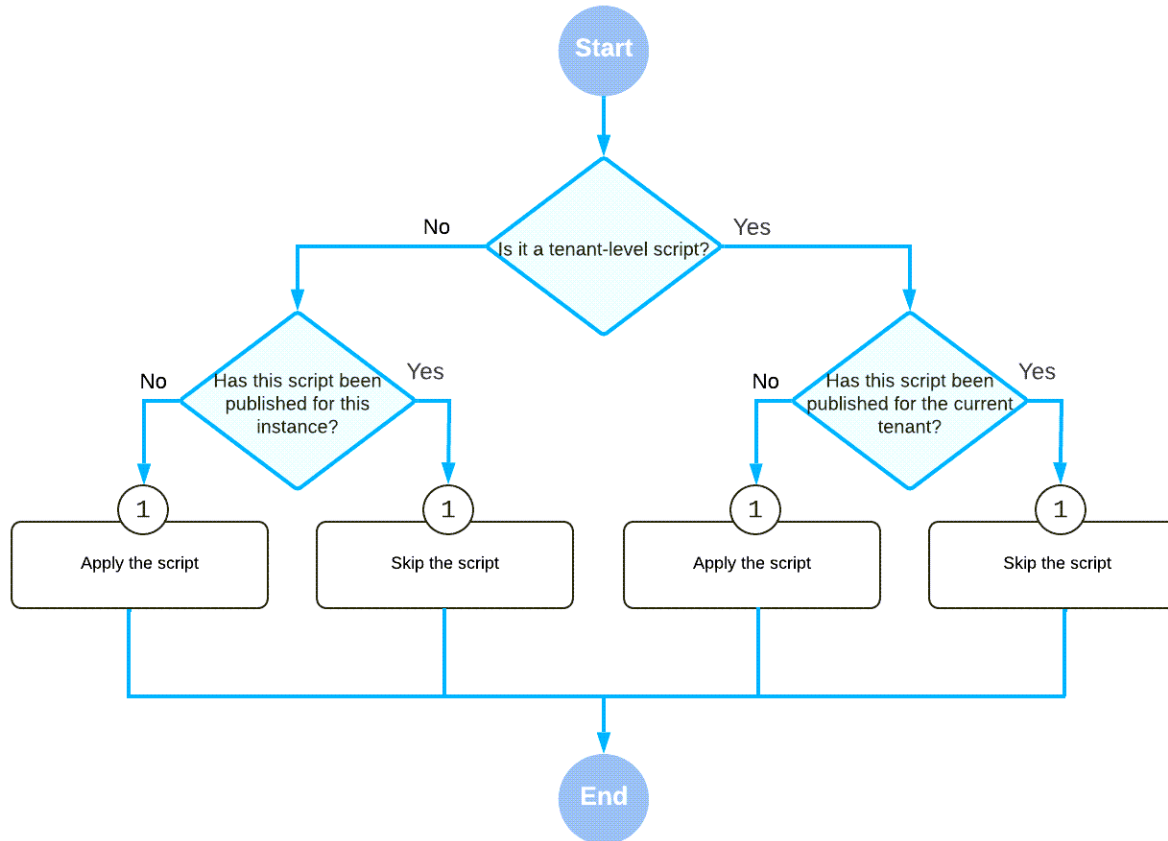
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## Learning Objectives

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

- To clean up all information about previously executed scripts of a customization project and execute the scripts once more during the publication of the project.

## Figure: Conditions for which scripts are applied



# Figure: Publishing of a customization project with the cleanup operation

The screenshot displays the 'Customization Project Editor' interface. The top navigation bar includes 'Back' and 'Reload' links. Below the navigation bar are tabs for 'File', 'Publish', 'Extension Library', and 'Source Control'. The 'Publish' menu is open, showing options: 'Publish Current Project (Ctrl+Space)', 'Validate Current Project', 'Multiple Projects', and 'Publish with Cleanup' (highlighted with a red box). The main workspace shows a tree view on the left with 'SCR' expanded, and a table of screens on the right. The table has columns for 'Title', 'Is New', 'Last Modified By', and 'Last Modified On'. The table contains four rows of screen data.

Title	Is New	Last Modified By	Last Modified On
<a href="#">AR_30_30_00</a> Customers	<input type="checkbox"/>	admin admin	3/31/2023
<a href="#">CR_30_10_00</a> Leads	<input type="checkbox"/>	admin admin	3/31/2023
<a href="#">CR_30_60_00</a> Cases	<input type="checkbox"/>	admin admin	3/31/2023
<a href="#">SO_30_10_00</a> Sales Orders	<input type="checkbox"/>	admin admin	3/31/2023

# Lesson Summary

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In this lesson, you have learned:

- About publishing with cleanup applies all database scripts again, regardless of whether these scripts have been applied before.

# Lesson 4.4: Customize a Multitenant Instance

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## Learning Objectives

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

- Customizations are applied to a multitenant site and how to publish customization projects to multiple tenants at once.

# Lesson Summary

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In this lesson, you have learned:

- About publishing a customization to one tenant or to multiple tenants at once.



# Lesson 4.5: Unpublish Customization Projects

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## Learning Objectives

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

- Unpublish your customization project or projects.

# Lesson Summary

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In this lesson, you have learned:

- About that If the changes that you have made to the website are no longer required, you can revert them by unpublishing your customization project or projects.

# Webinar in Summary

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In this lesson, you have learned how to create, work with, publish, and manage a customization project. In the process, you have learned how to use the following customization tools provided by the Acumatica Customization Platform:

- The Customization Project Editor
- The Element Inspector

You have learned how to do the following to work with customization projects:

- Performing the customization of existing forms of Acumatica ERP in the following ways:
  - Adding new fields and tabs
  - Modifying the properties of existing fields
  - Configuring the layout of controls
  - Adding buttons to the form toolbar and the corresponding commands to the More menu
  - Configuring conditions for the properties of field or actions
  - Adding columns to lookup tables
- Adding customization items of various types to the customization project
- Managing customization projects and items within a customization project
- Deploying a customization project to another system
- Publishing multiple customization projects
- Publishing a customization project to a multitenant instance
- Unpublishing customization projects



Thank you!

Boravan Ung