Acumatica
The Cloud ERP

W140 Customization Projects

Boravan Ung

Technical Account Manager

Timing and Agenda

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

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

Joe Gibbs Racing
Acumatica Partner

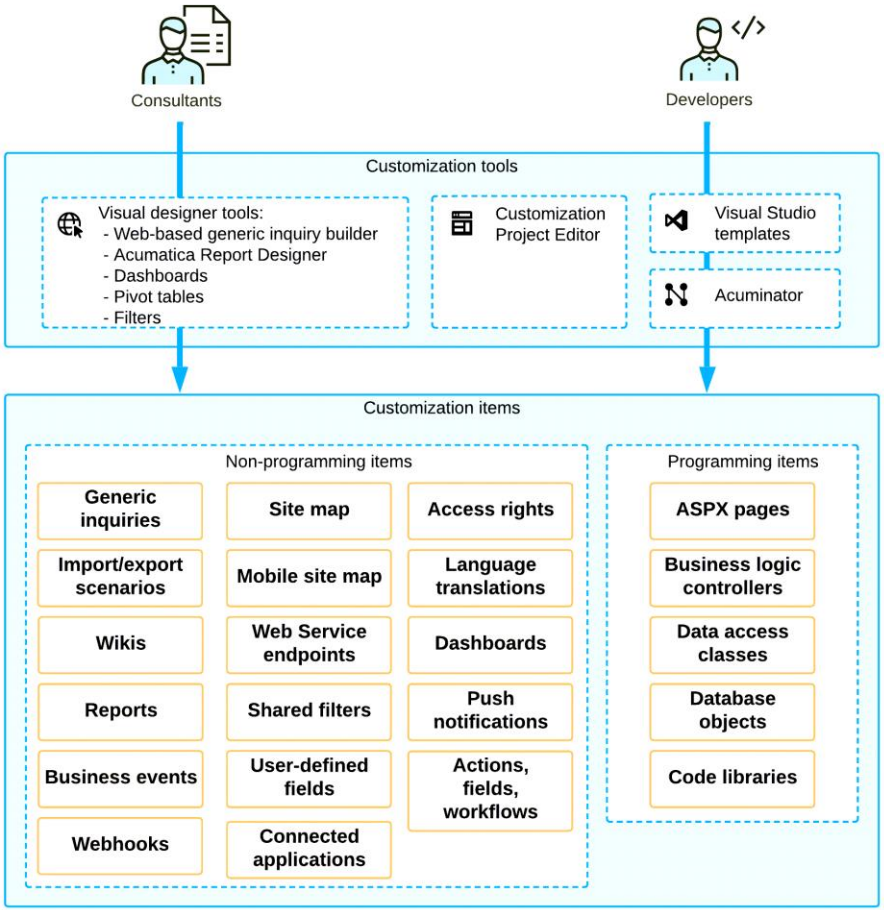
Day 1

Company Story and Customization Description

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

Learning Objectives

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

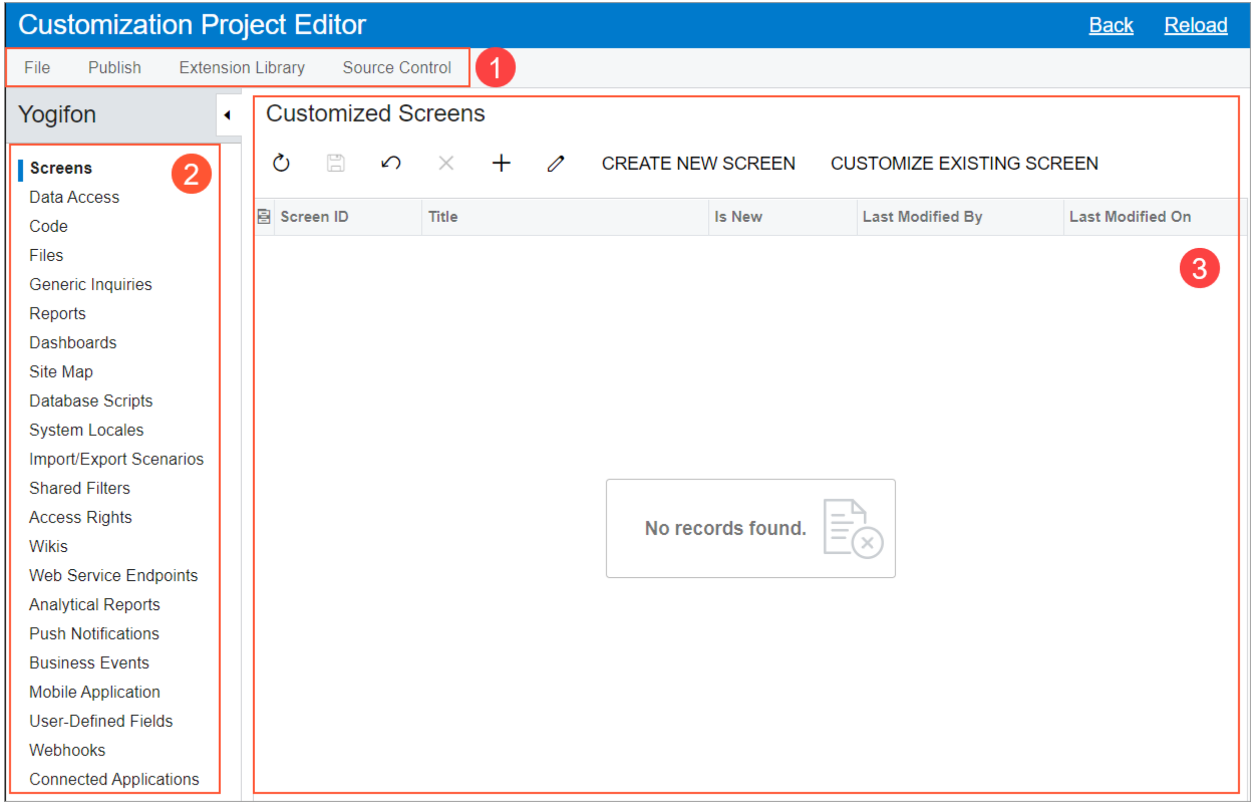
- Create a customization project.

Lesson Summary

In this lesson, you have learned:

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

Figure: The Customization Project Editor webpage



Lesson 2.1: Add a Generic Inquiry to the Customization Project

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

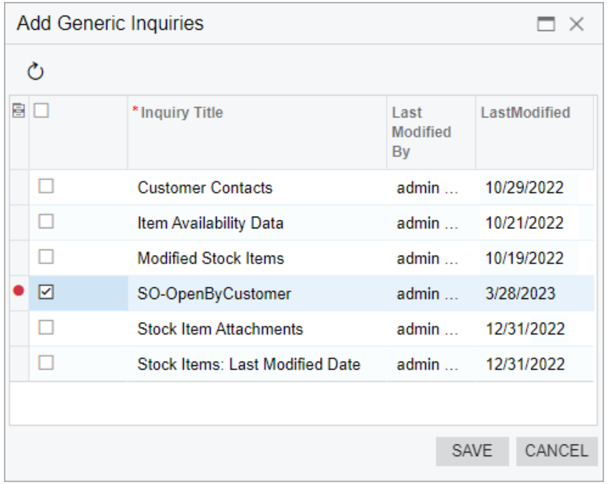
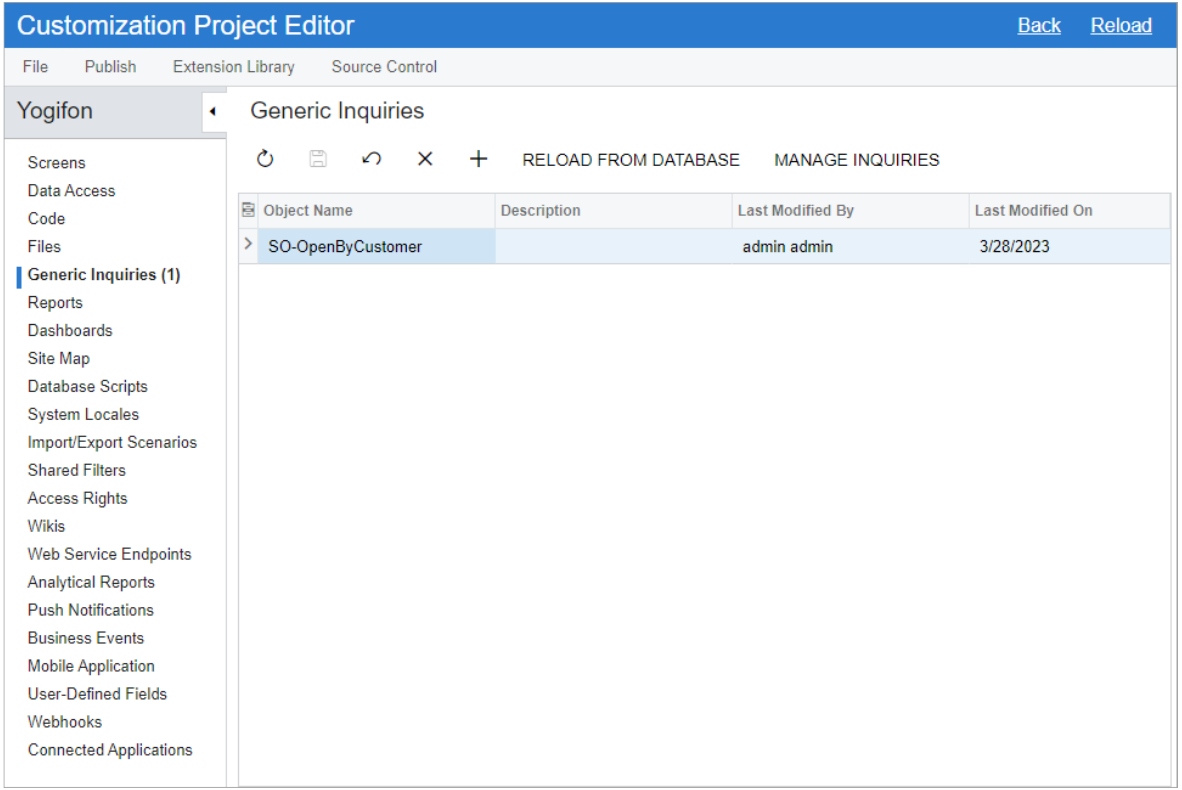


Figure: The SO-OpenByCustomer generic inquiry as a customization item



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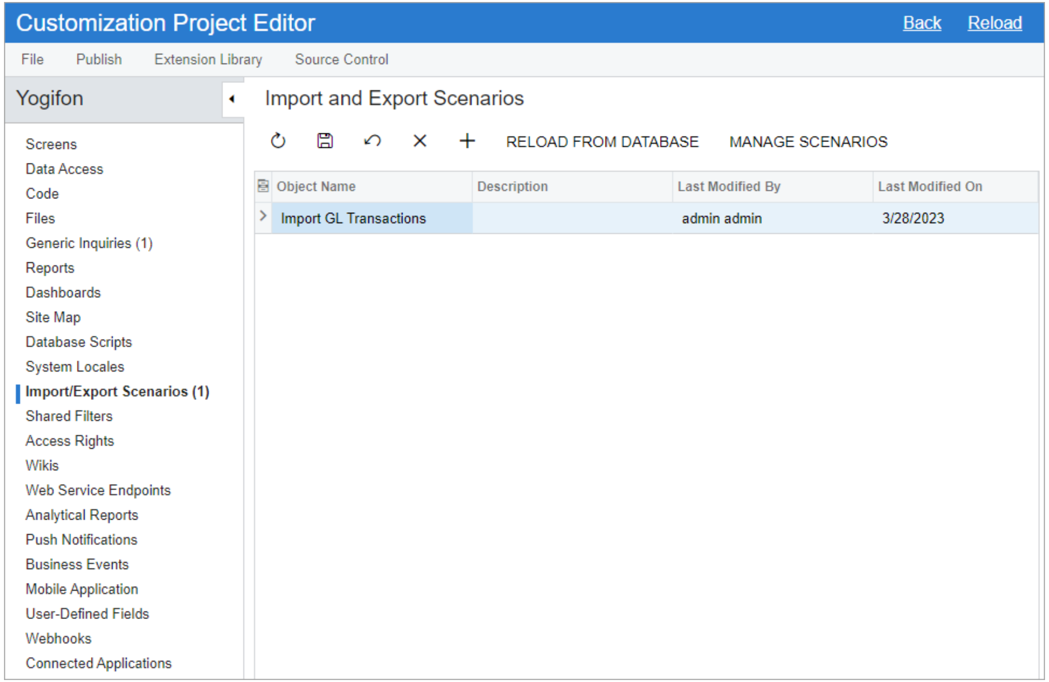
Lesson Summary

In this lesson, you have learned:

- About adding a generic inquiry to a customization project.

Figure: The Import and Export Scenarios page



Lesson 2.2: Update a Customization Item

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

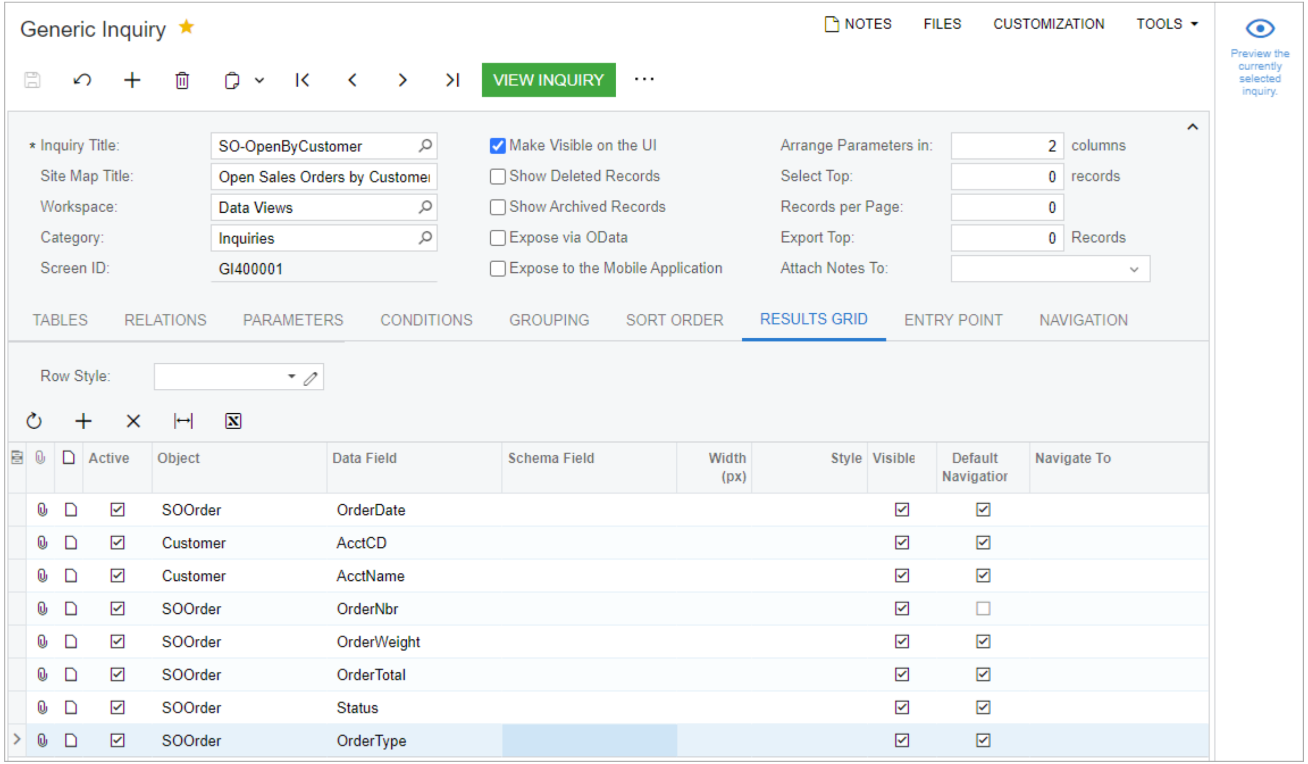
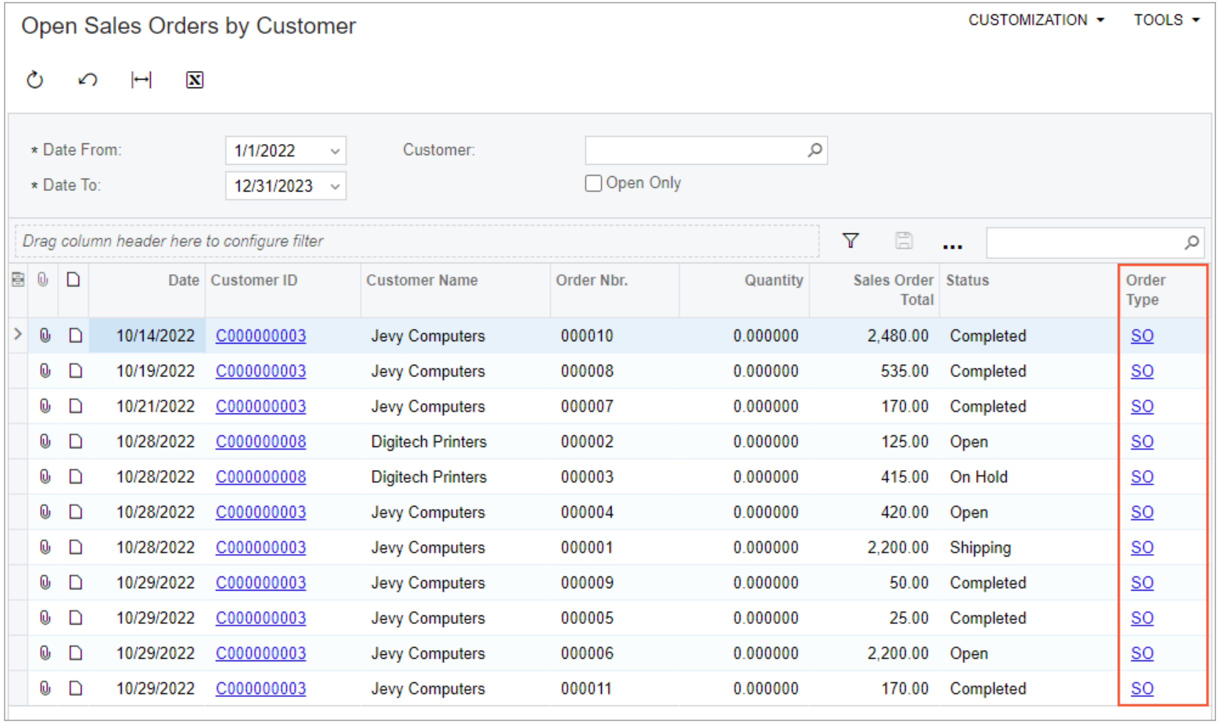


Figure: The generic inquiry form with the added column



Open Sales Orders by Customer

CUSTOMIZATION TOOLS

* Date From: 1/1/2022
* Date To: 12/31/2023

Customer:

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	C000000003	Jevy Computers	000010	0.000000	2,480.00	Completed	SO
10/19/2022	C000000003	Jevy Computers	000008	0.000000	535.00	Completed	SO
10/21/2022	C000000003	Jevy Computers	000007	0.000000	170.00	Completed	SO
10/28/2022	C000000008	Digitech Printers	000002	0.000000	125.00	Open	SO
10/28/2022	C000000008	Digitech Printers	000003	0.000000	415.00	On Hold	SO
10/28/2022	C000000003	Jevy Computers	000004	0.000000	420.00	Open	SO
10/28/2022	C000000003	Jevy Computers	000001	0.000000	2,200.00	Shipping	SO
10/29/2022	C000000003	Jevy Computers	000009	0.000000	50.00	Completed	SO
10/29/2022	C000000003	Jevy Computers	000005	0.000000	25.00	Completed	SO
10/29/2022	C000000003	Jevy Computers	000006	0.000000	2,200.00	Open	SO
10/29/2022	C000000003	Jevy Computers	000011	0.000000	170.00	Completed	SO

Lesson Summary

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

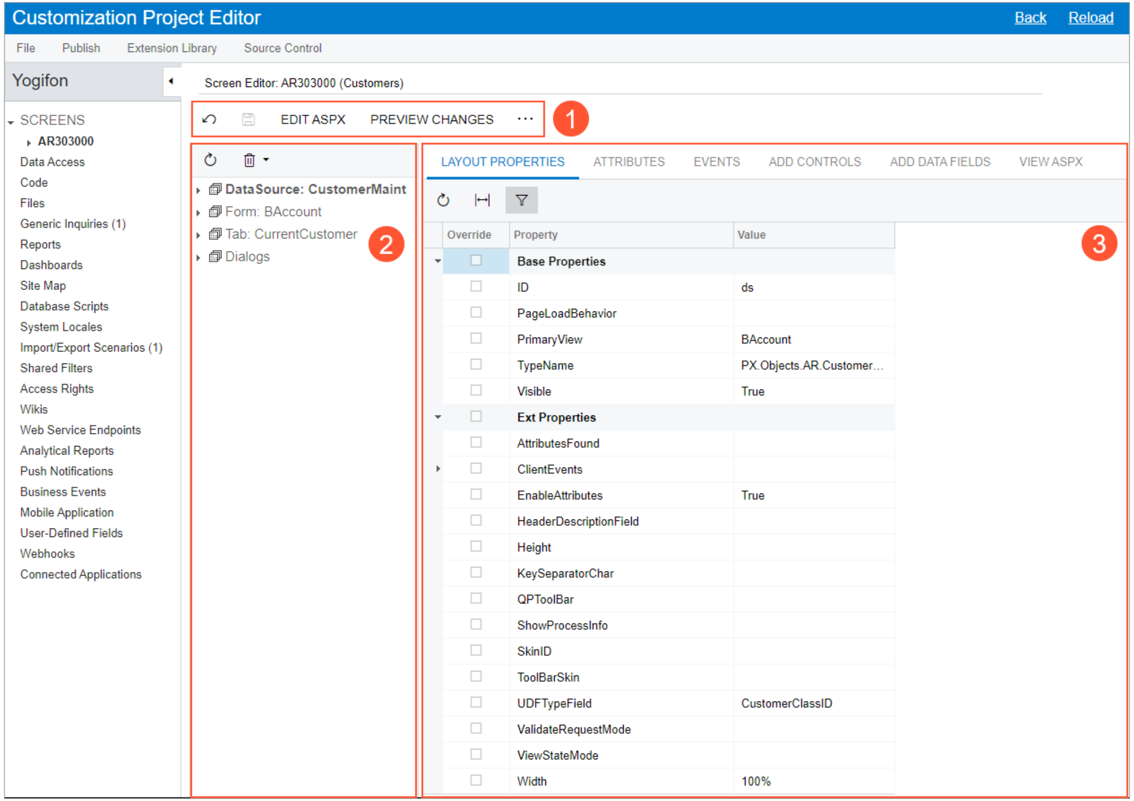
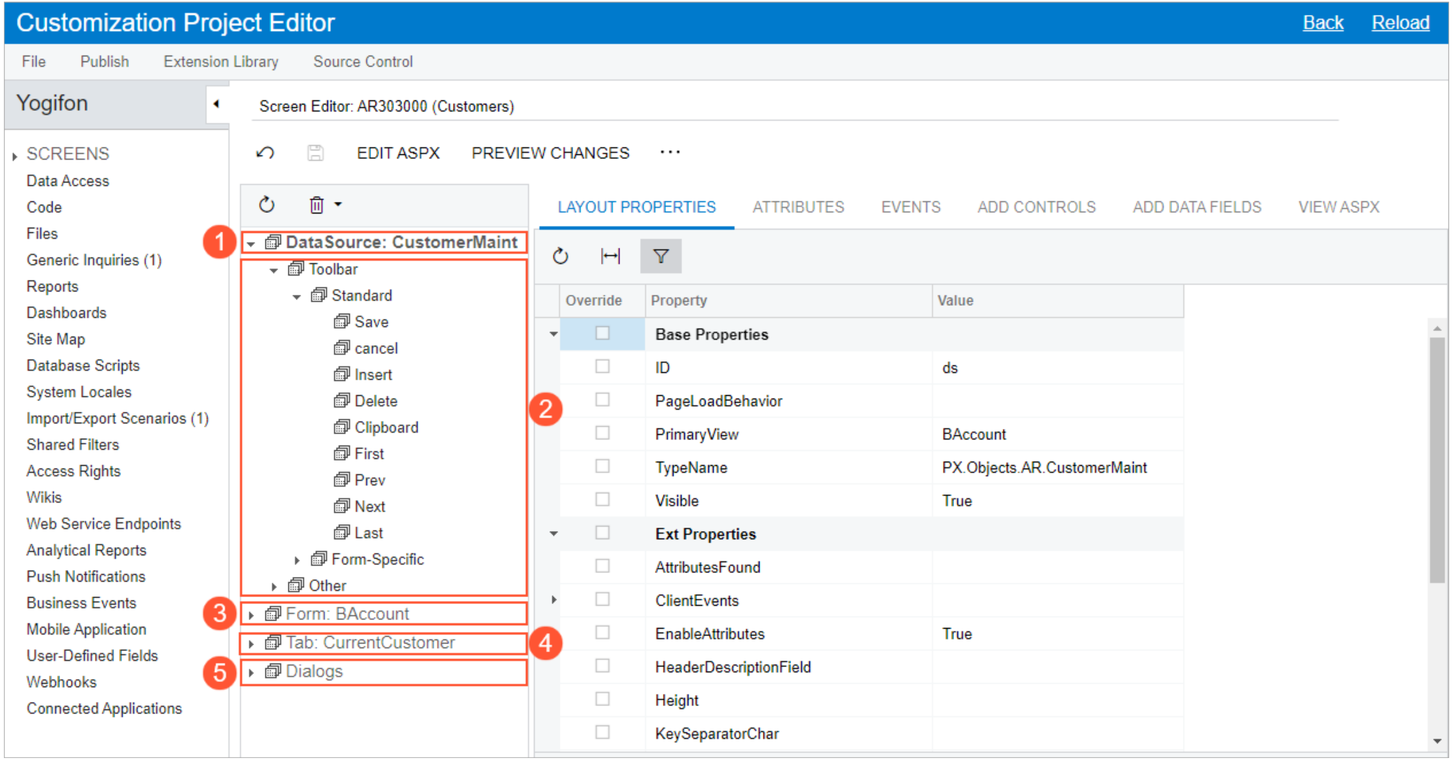


Figure: Control tree of the Customers form



Lesson 3.1: Add a Box to a Form

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

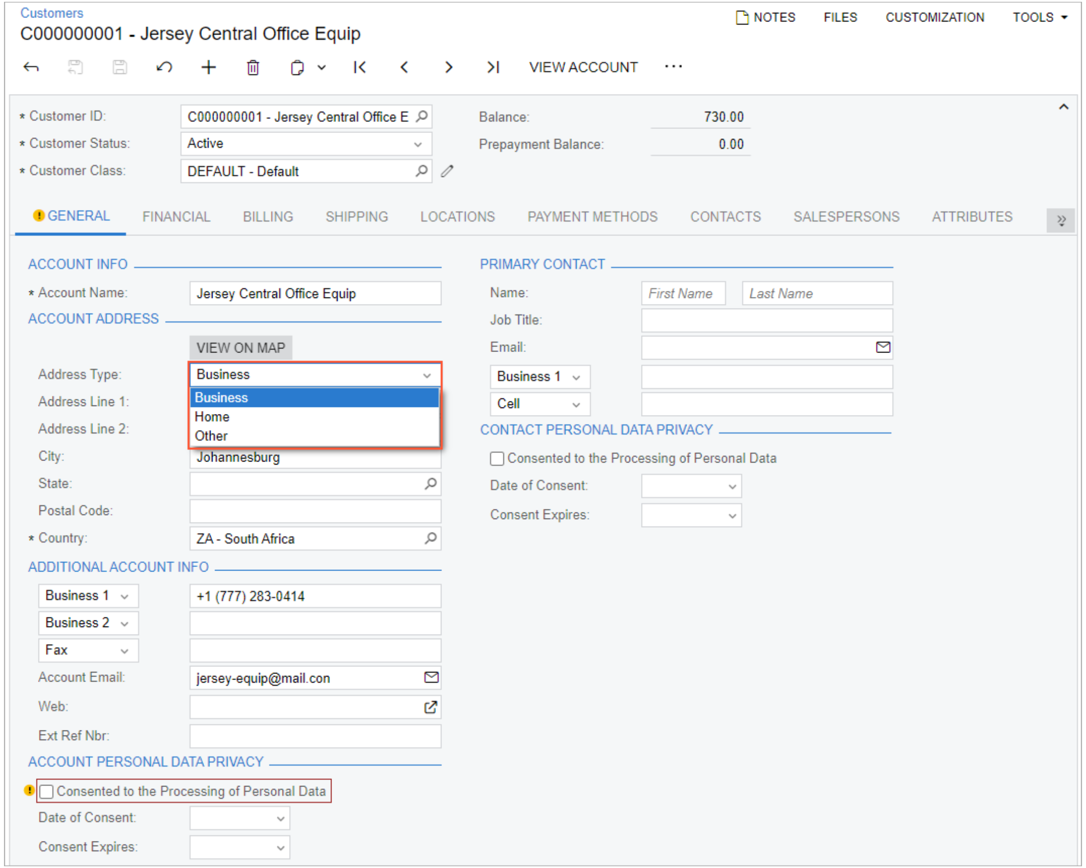


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Figure: The Element Properties dialog box

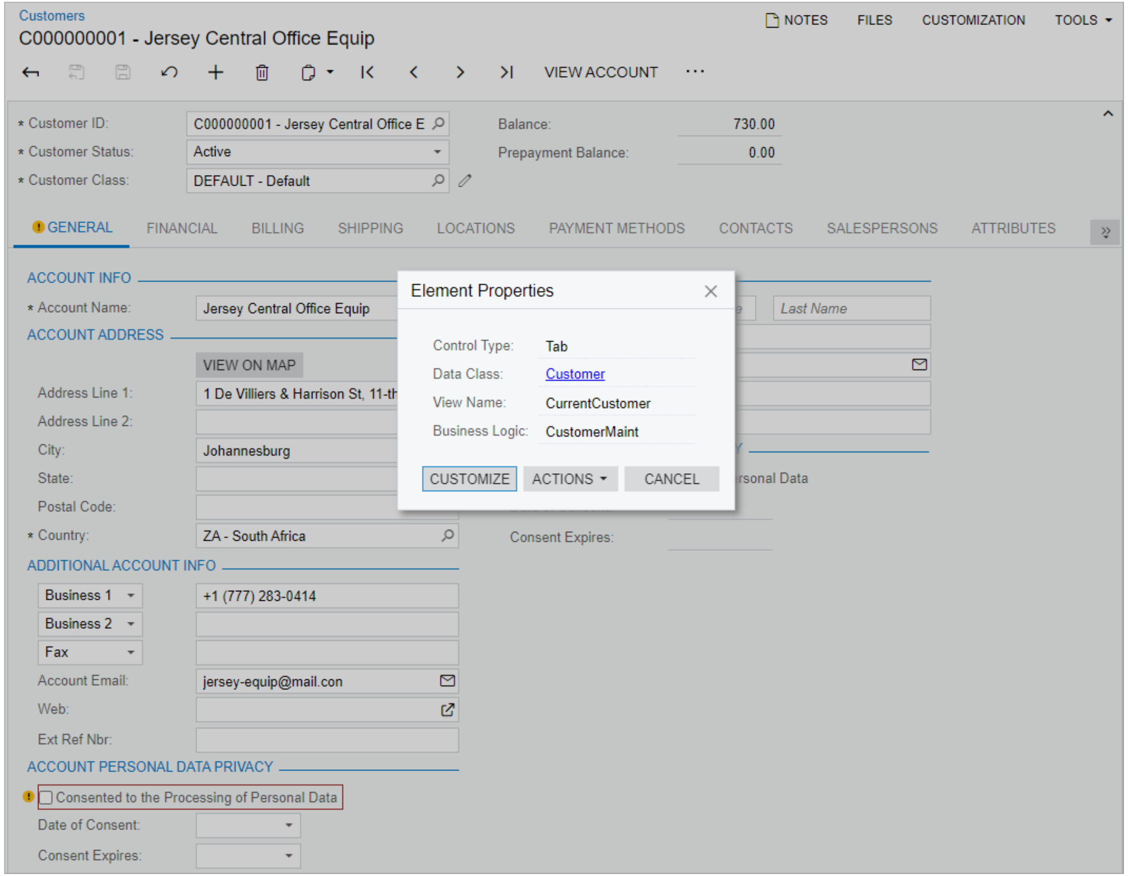


Figure: The Screen Editor page for the Customers form

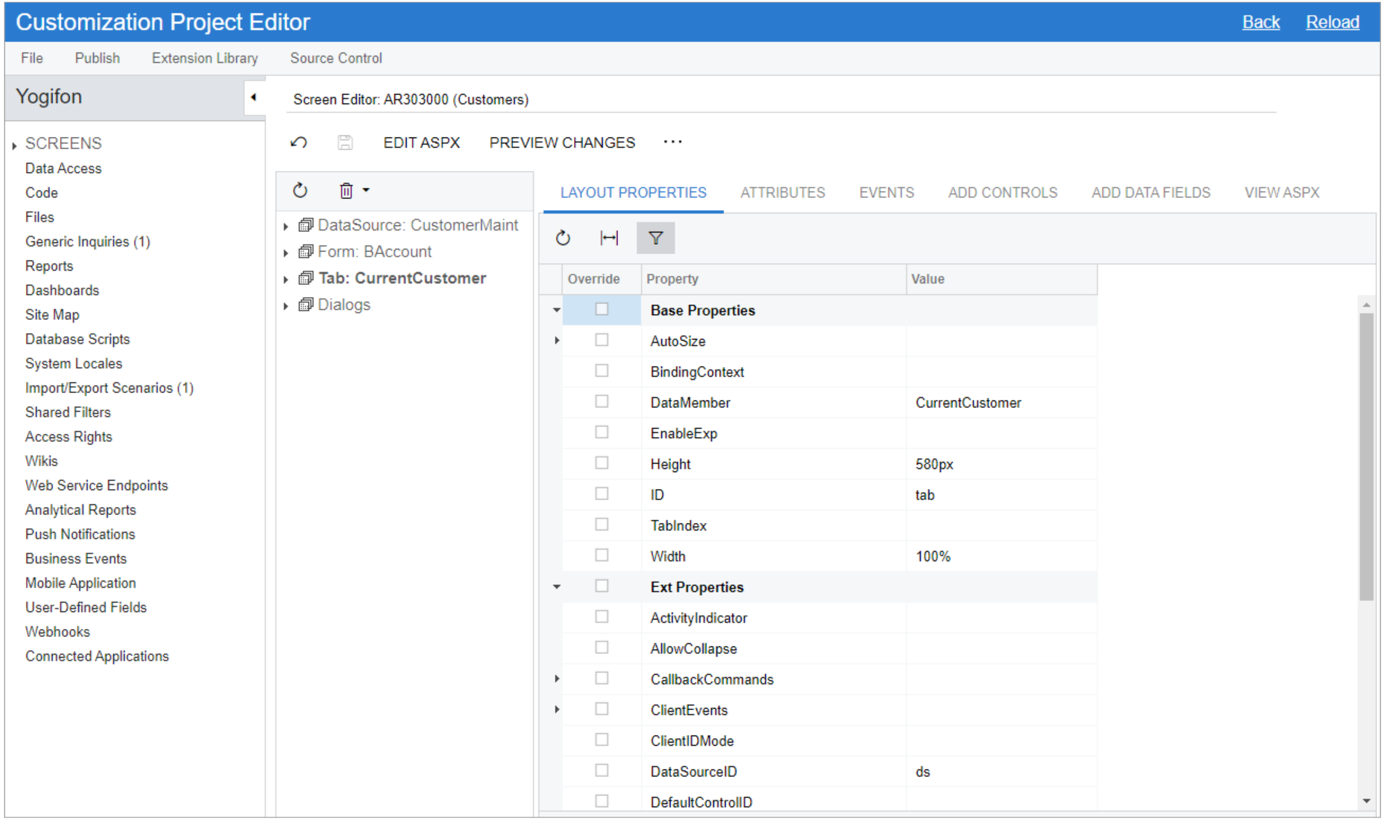


Figure: The location of the Account Address section

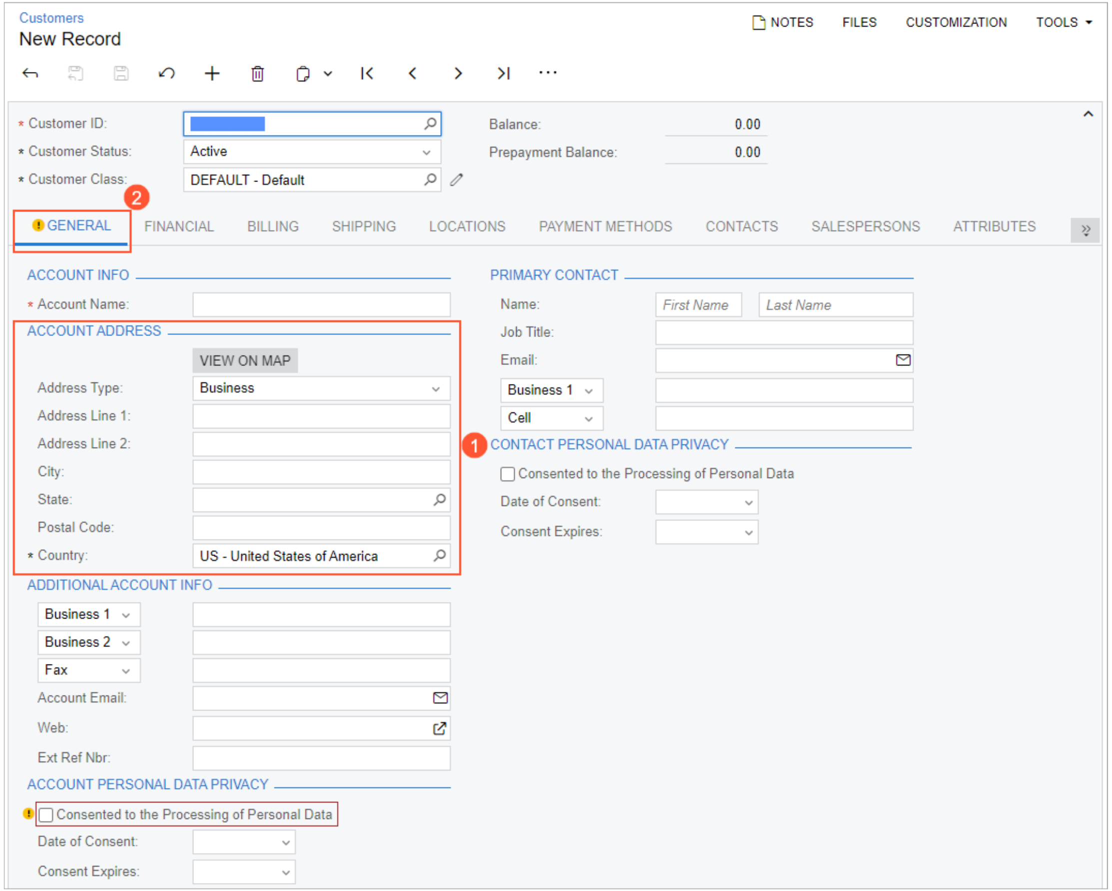


Figure: The Add Data Fields tab

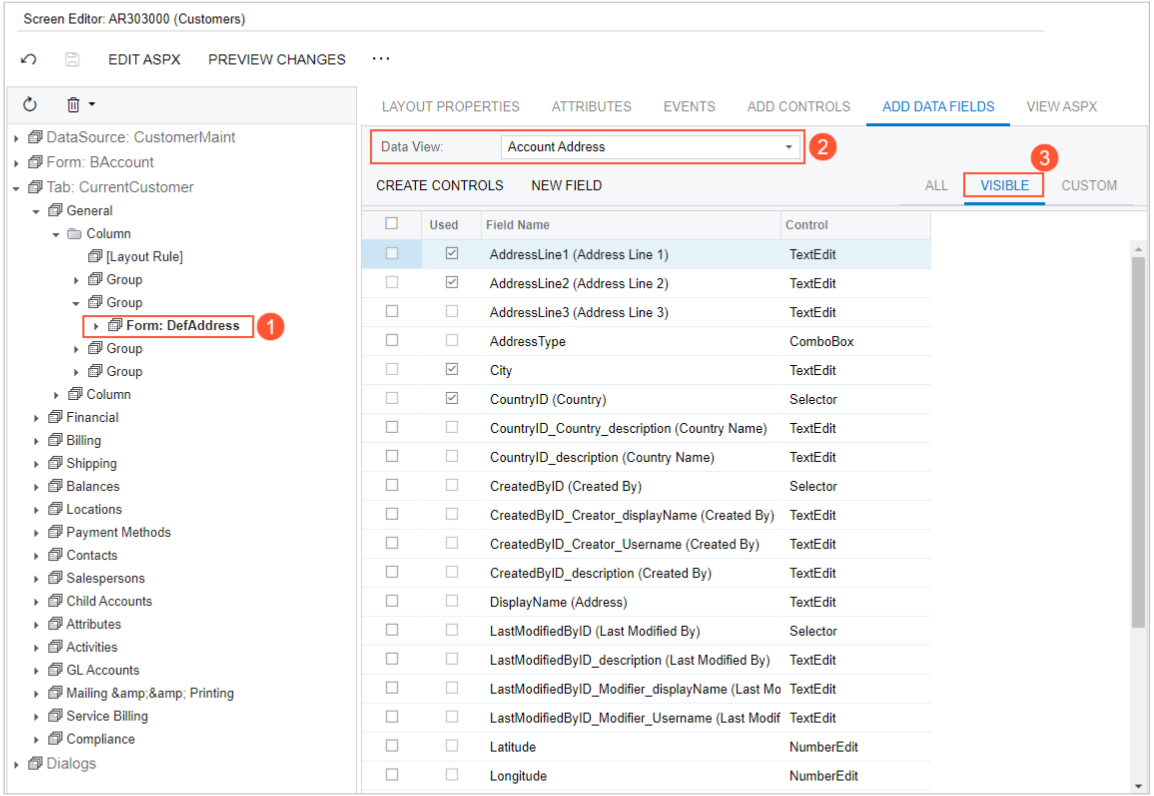


Figure: Addition of the AddressType field

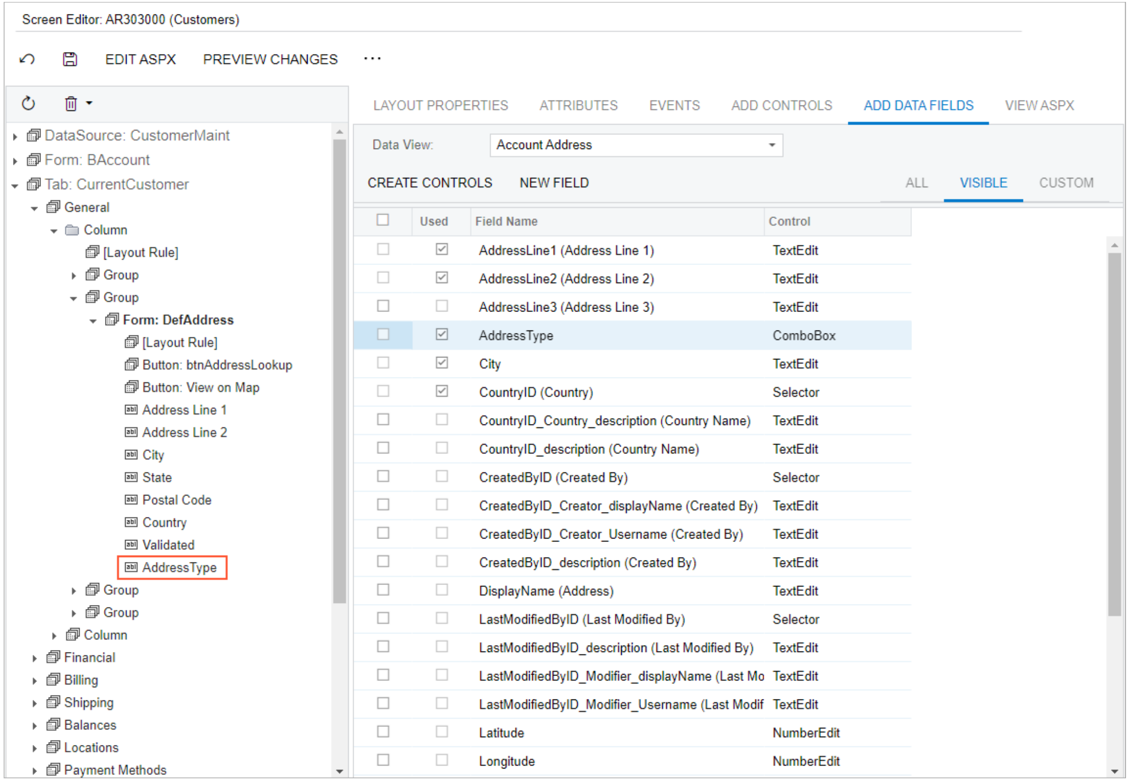


Figure: Placement of the new element in the control tree

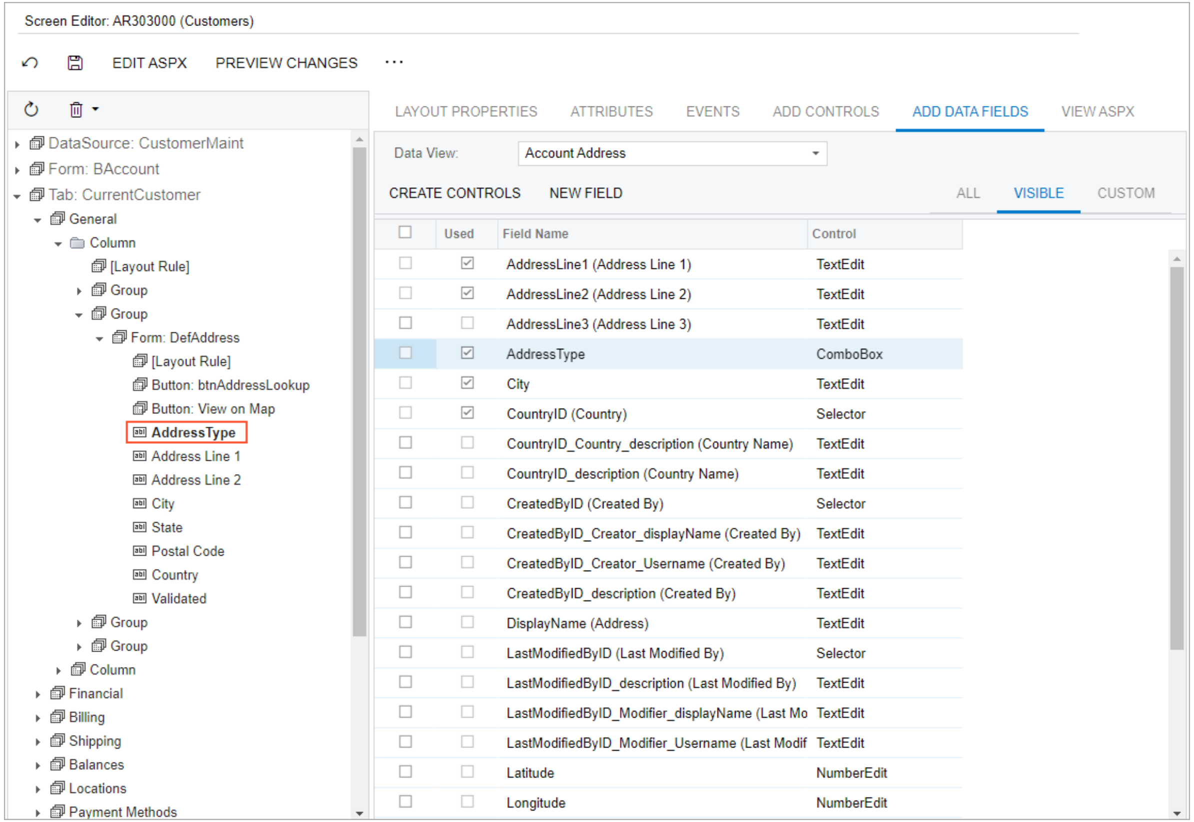


Figure: Add Field dialog box

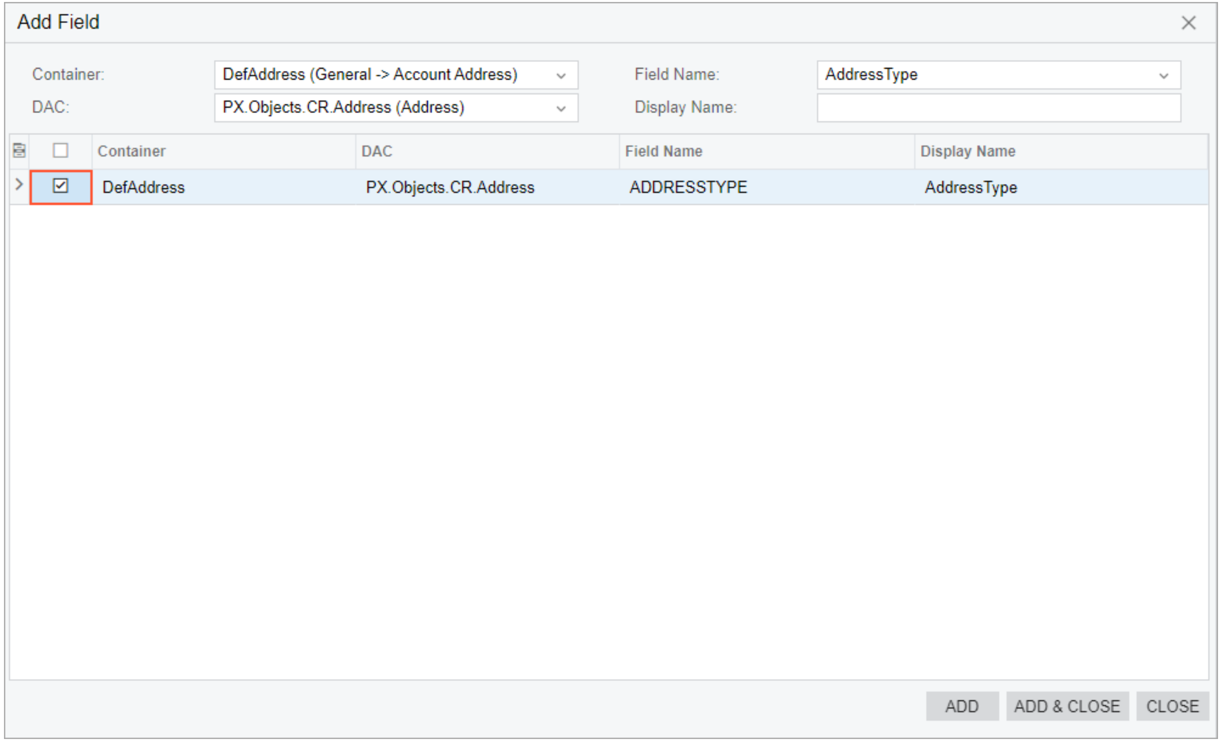
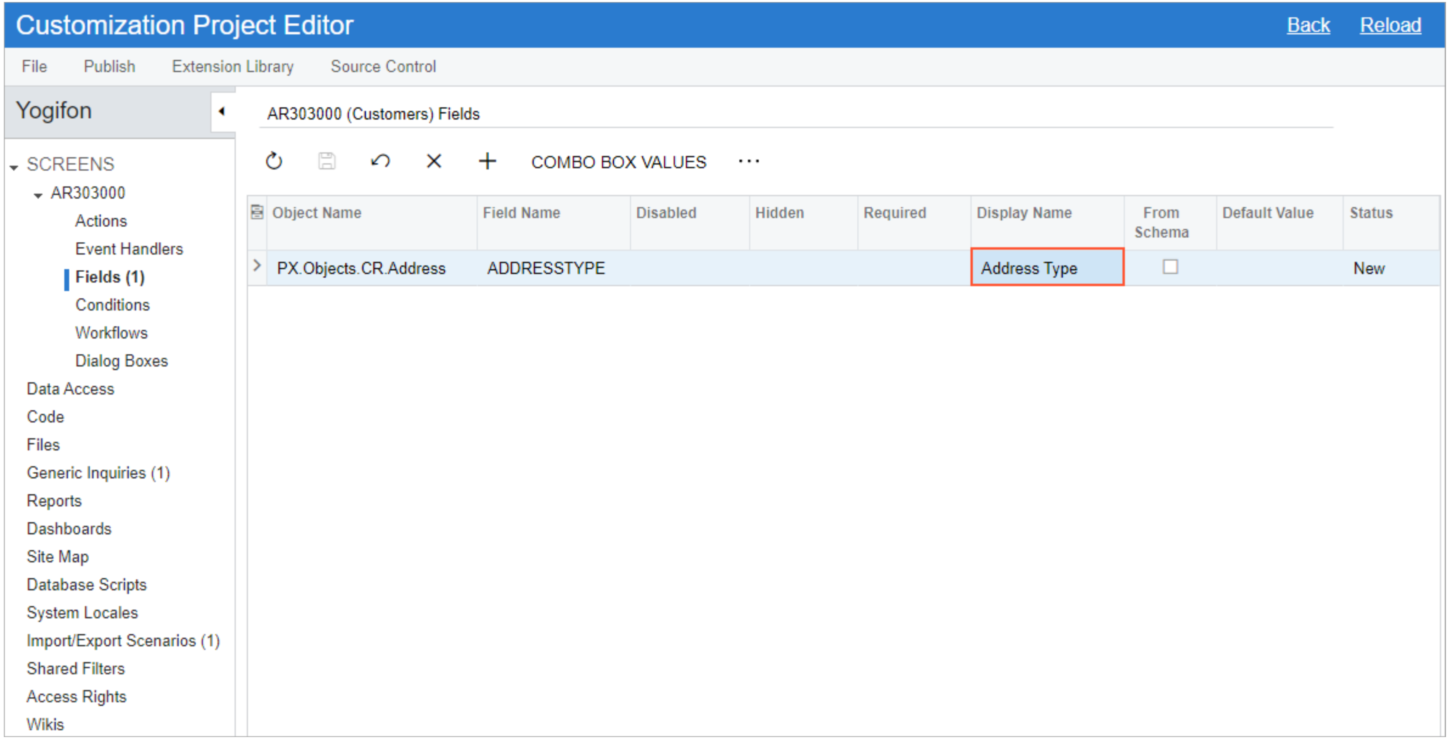


Figure: Fields page of the screen



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

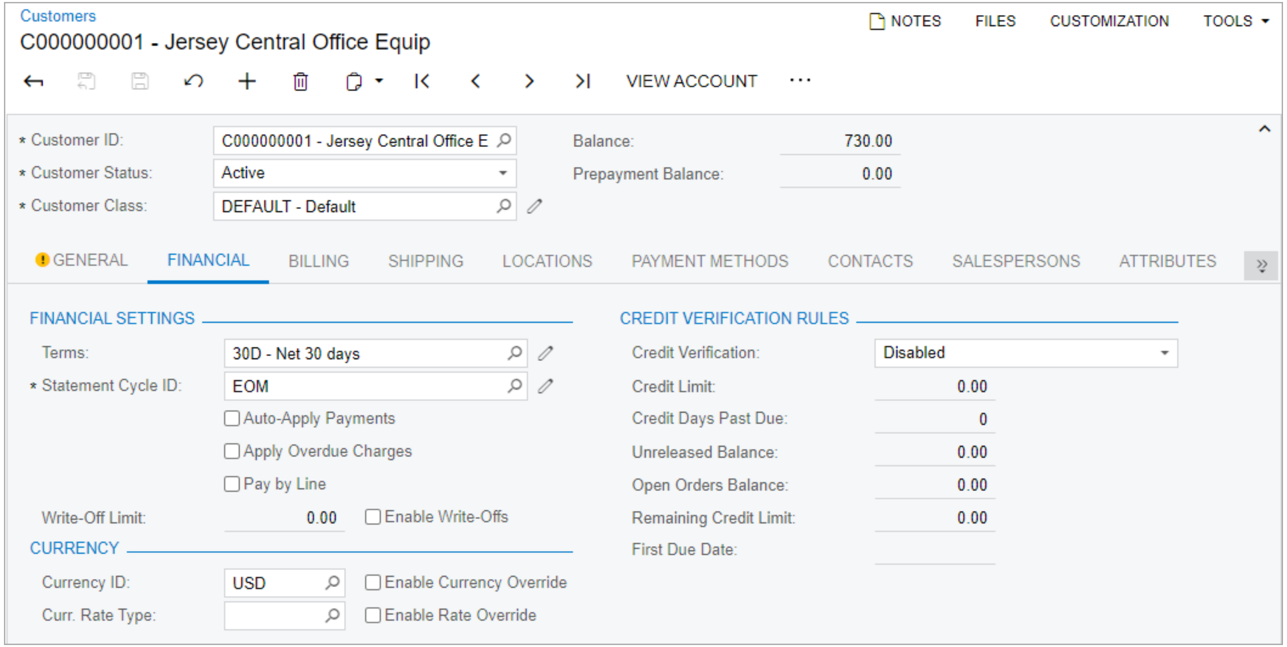


Figure: Elements of the first Column node

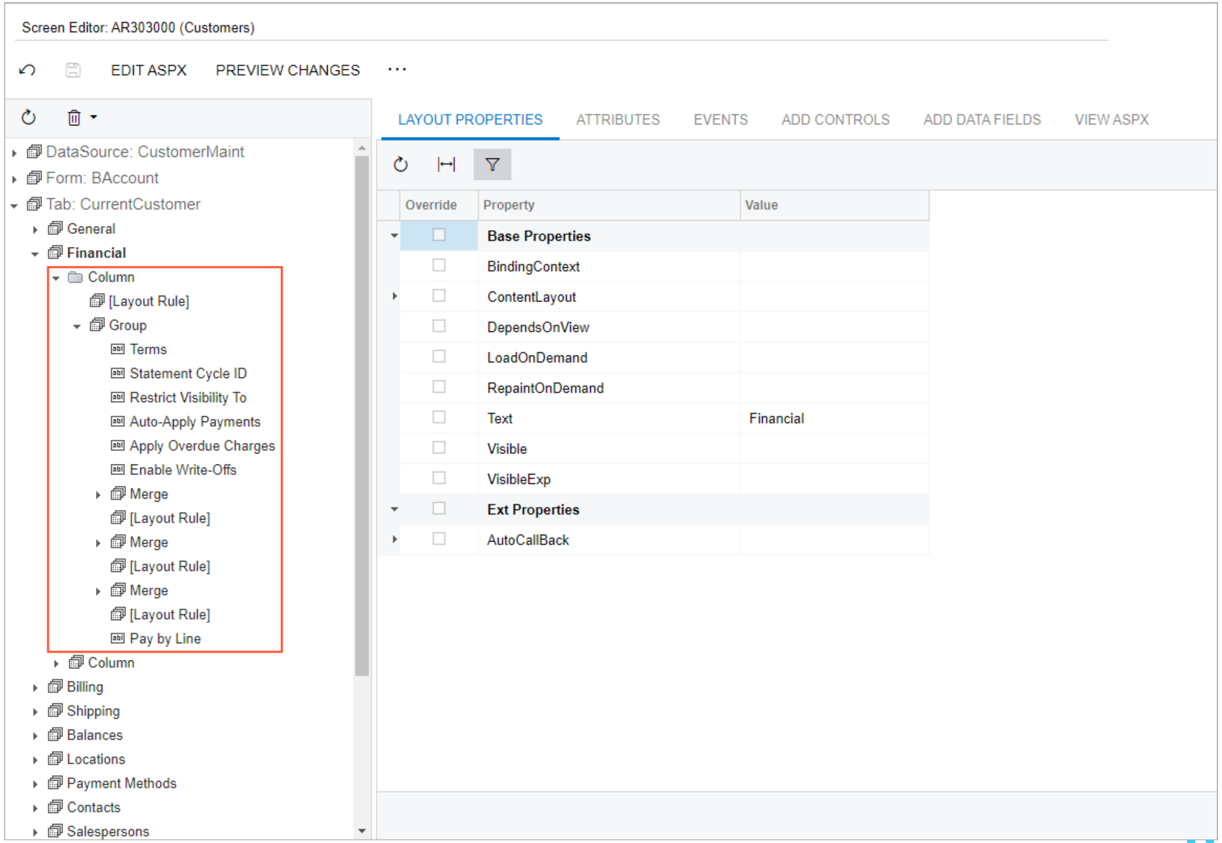


Figure: The Group element being dragged

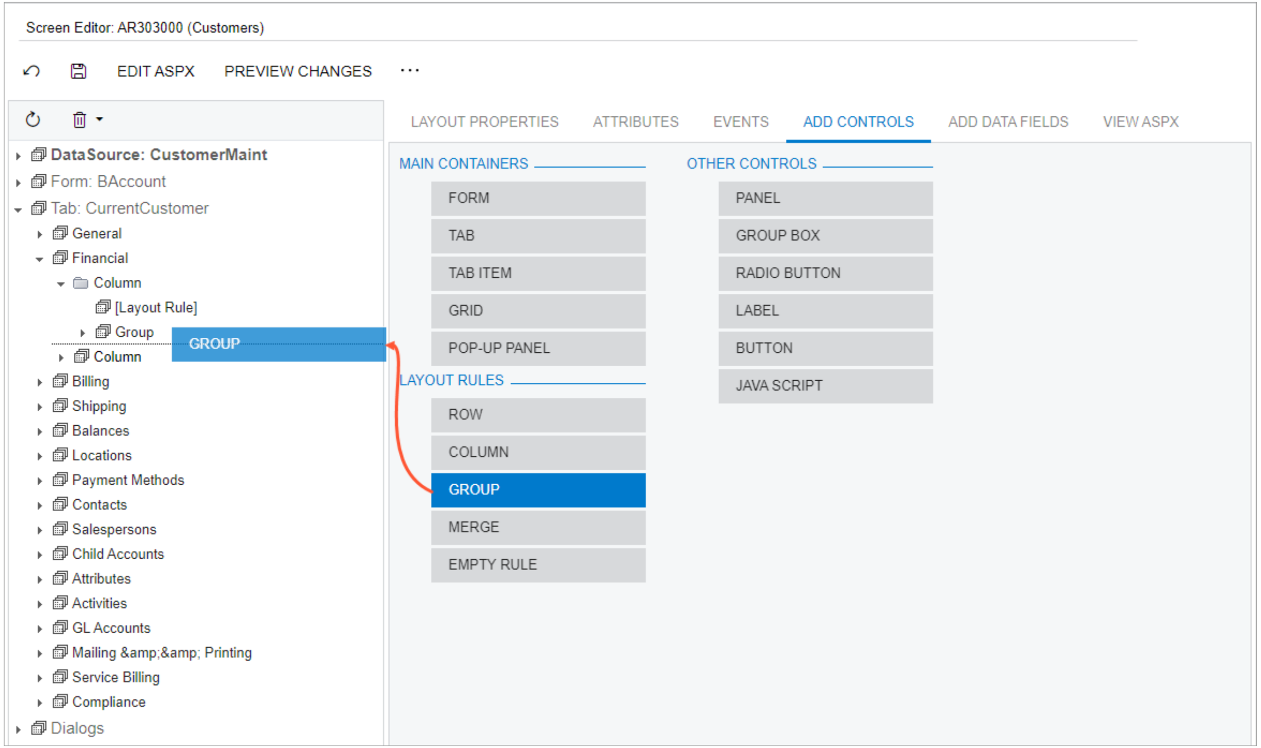


Figure: The relocated elements of the second Group node

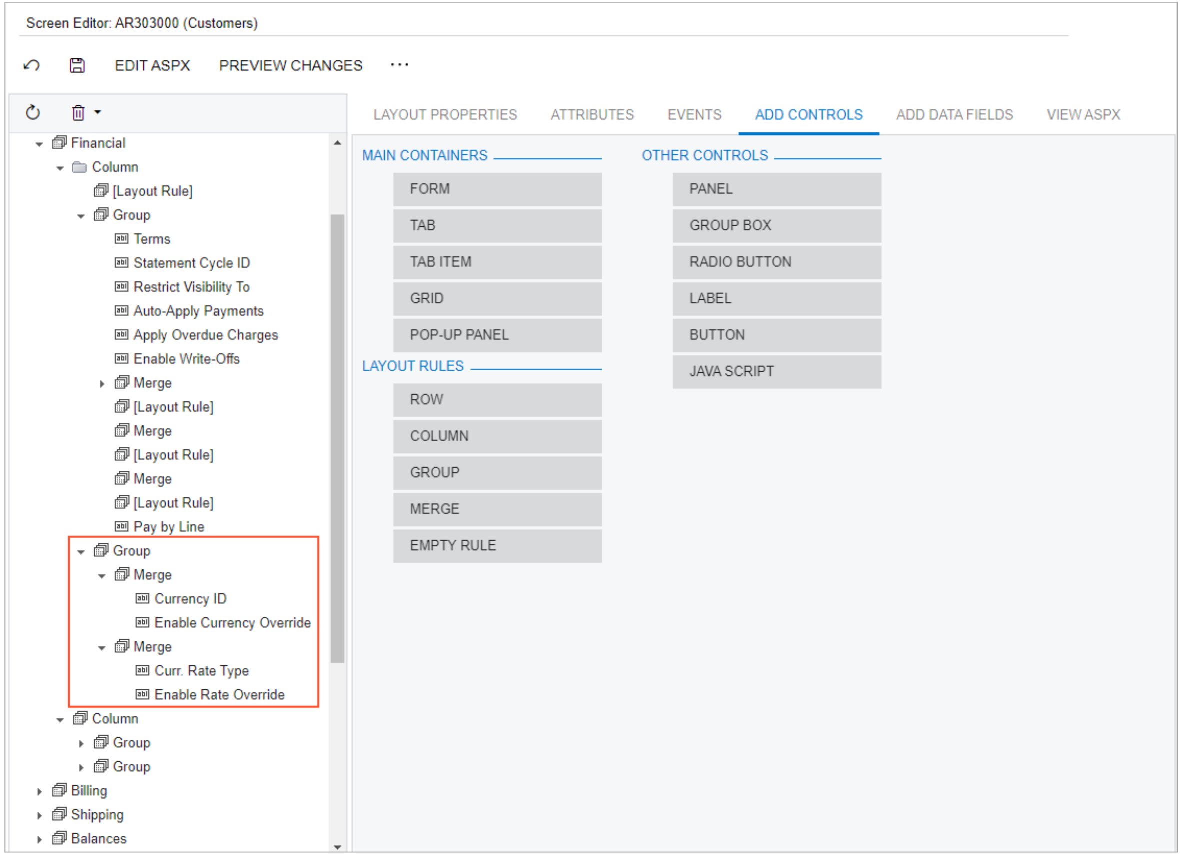


Figure: The relocated elements of the first Merge node

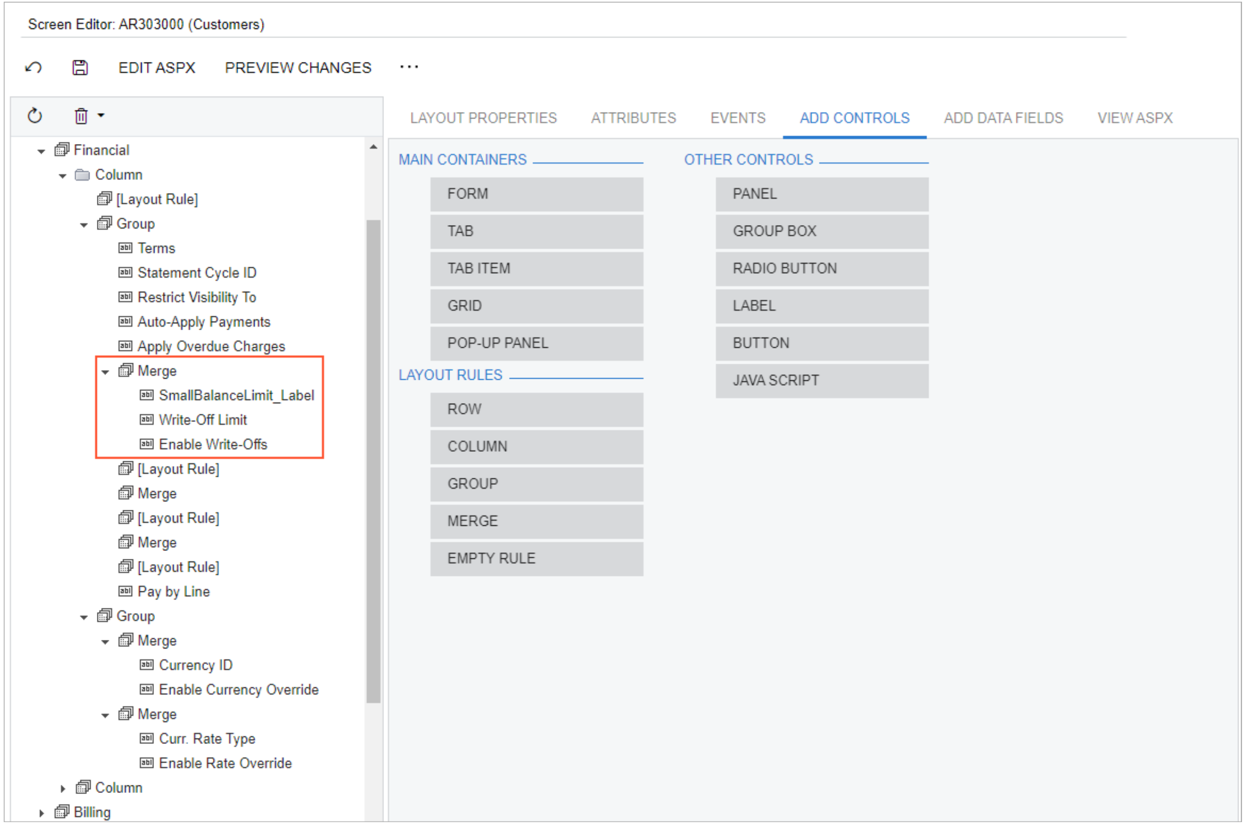
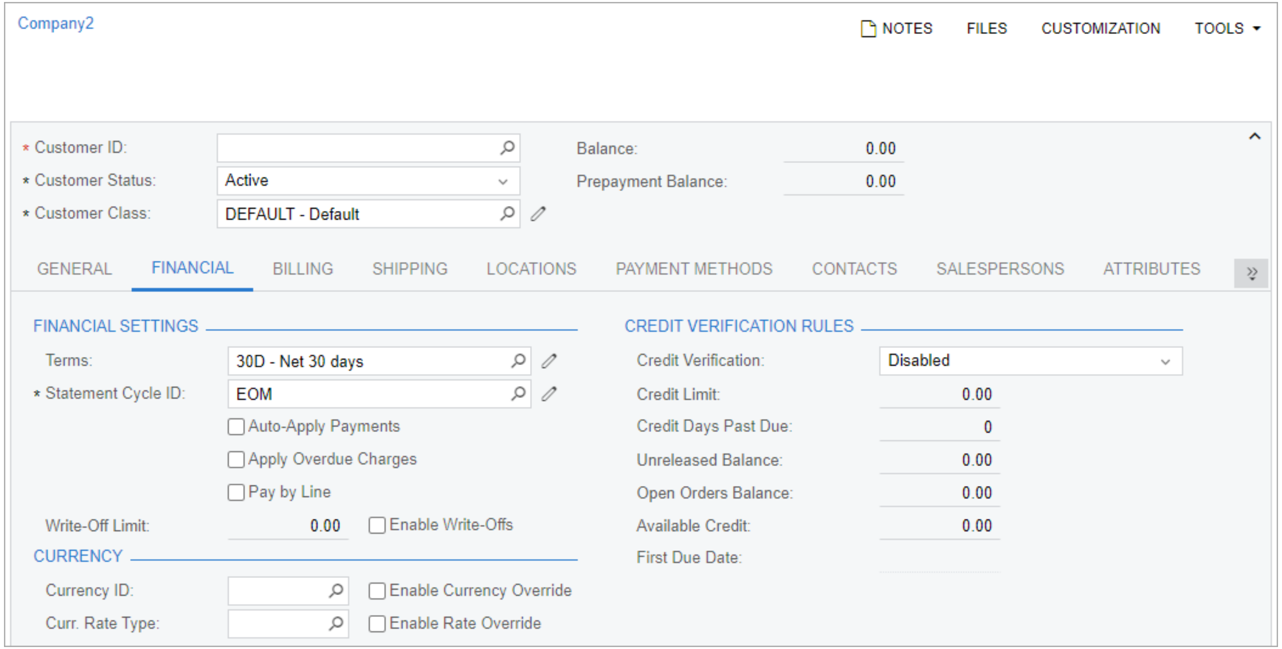


Figure: The Financial tab



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

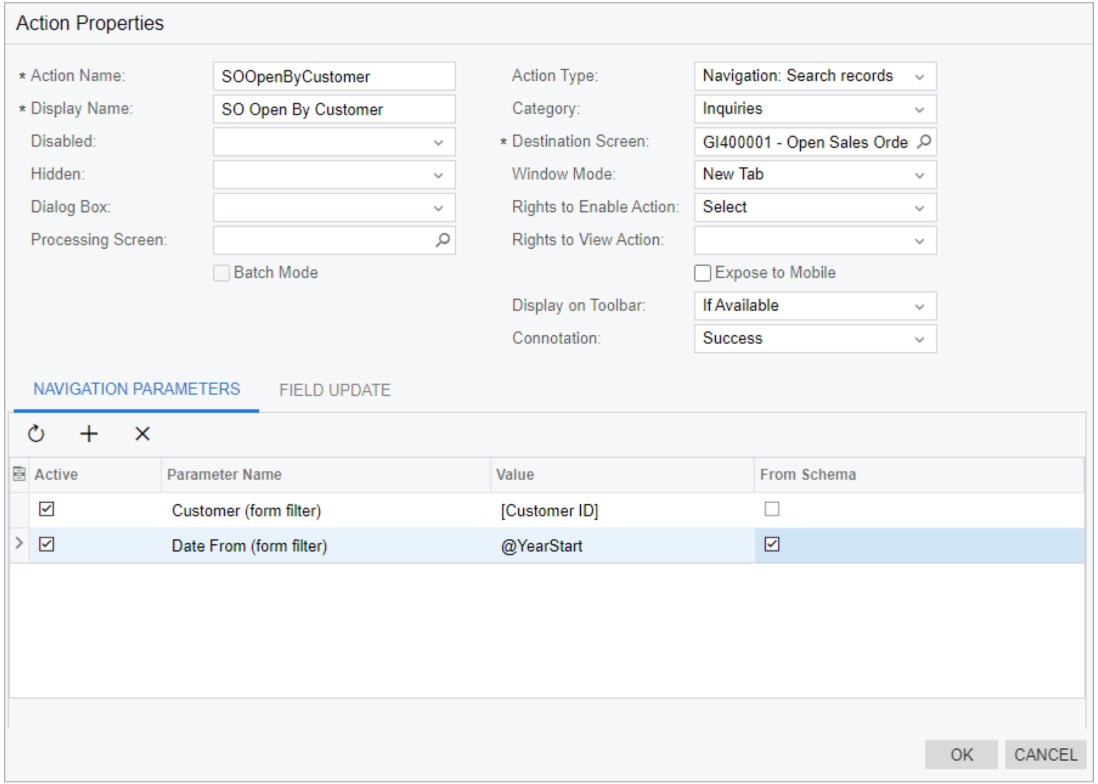


Figure: The Open SO by Customer action

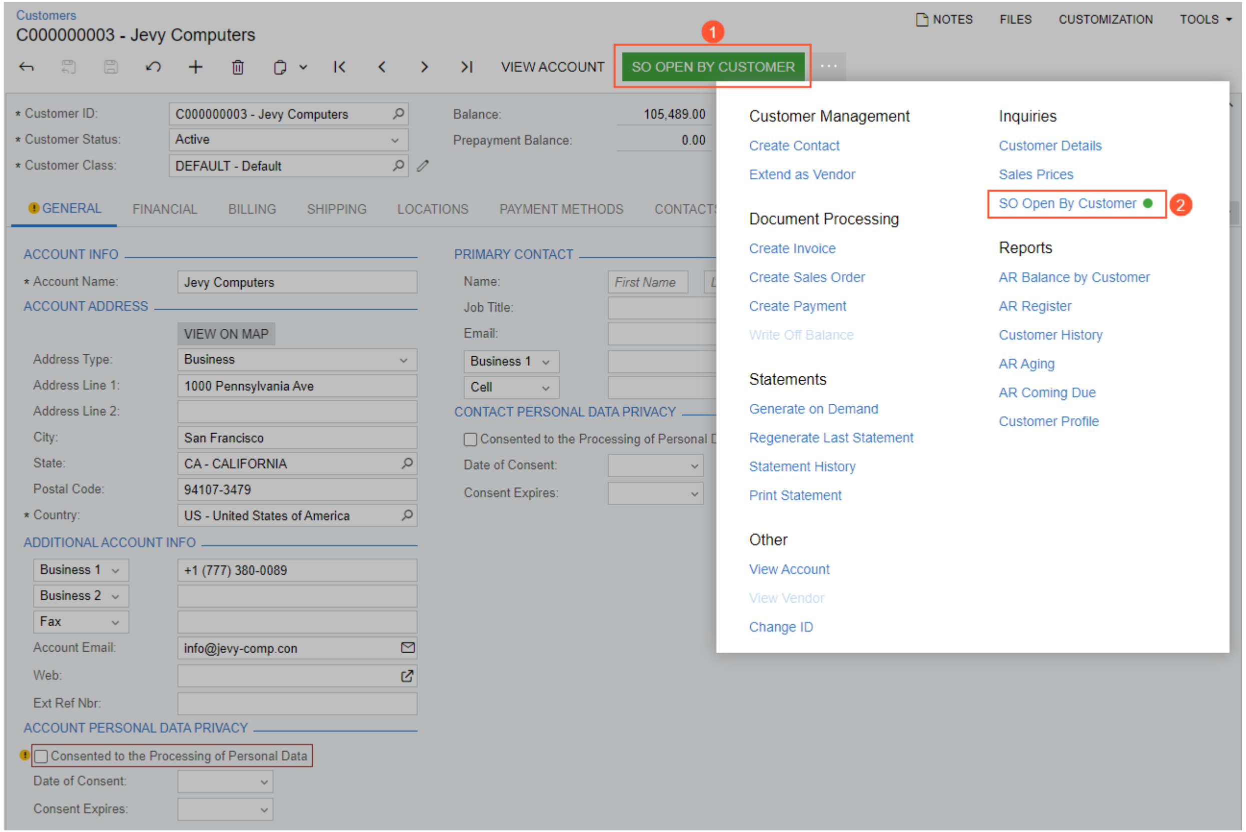


Figure: The Action Properties dialog box

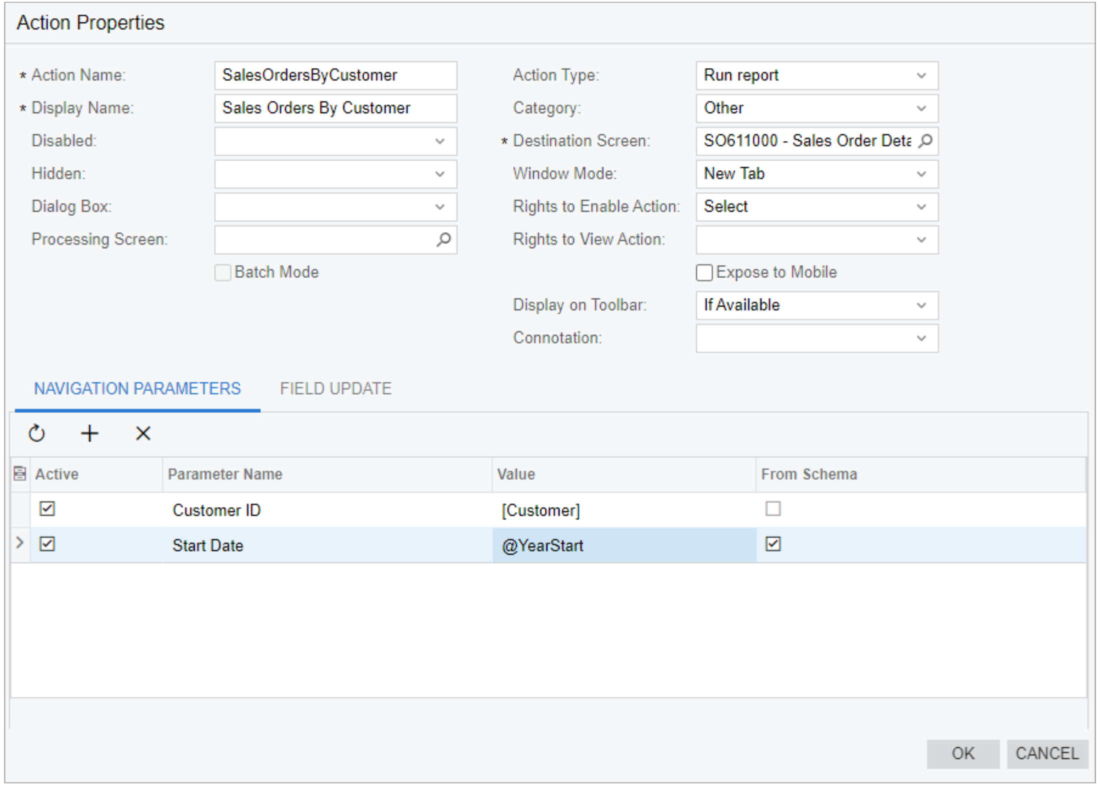


Figure: The added Case Side Panel action

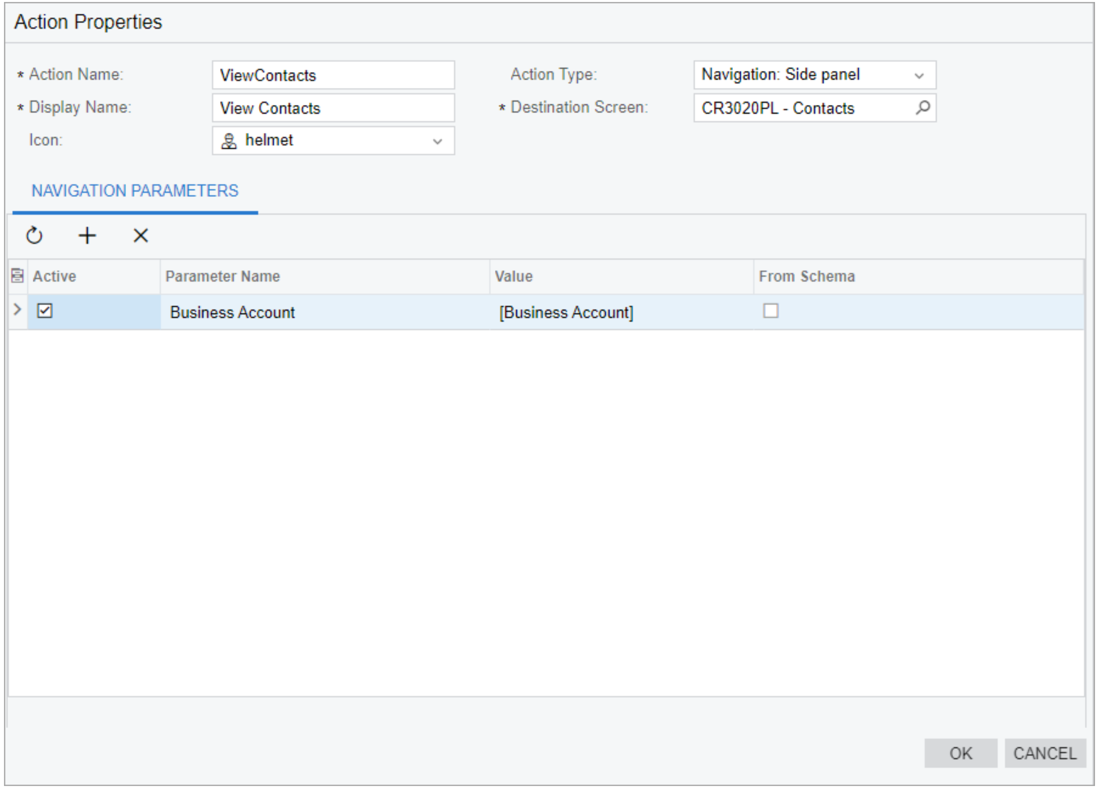
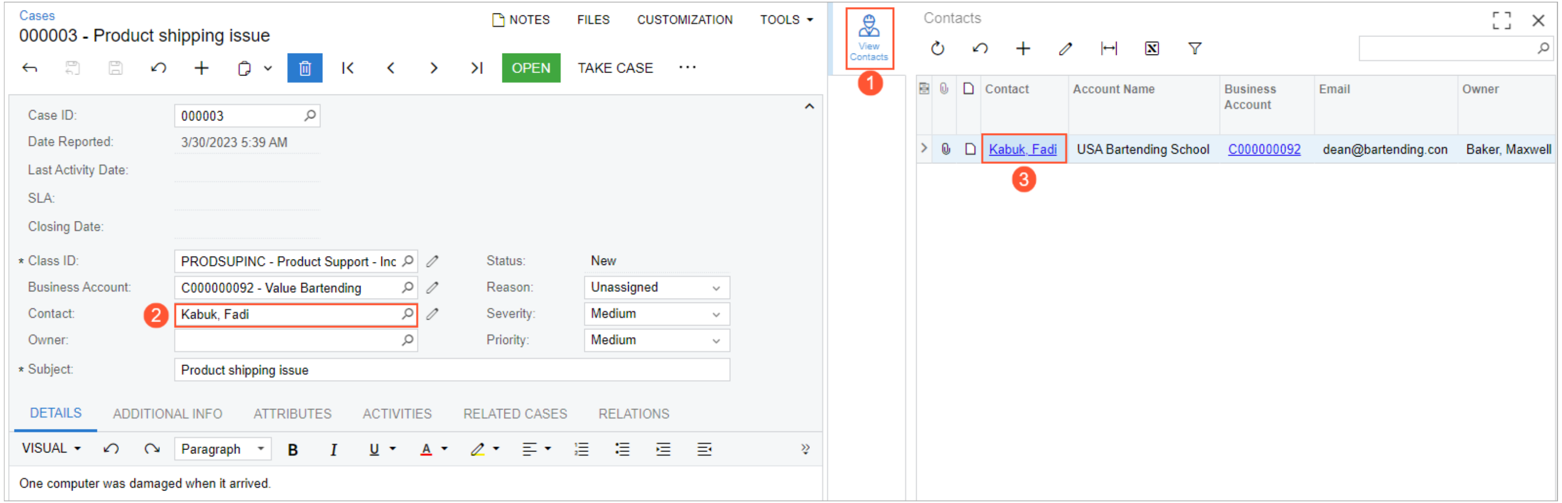


Figure: The modified Cases form



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

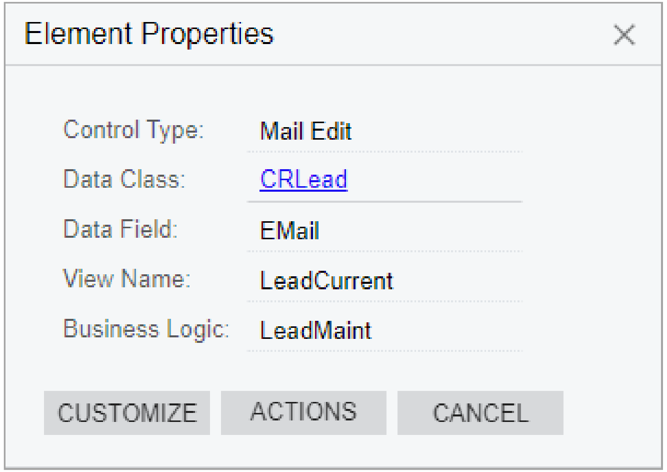


Figure: The Conditions page

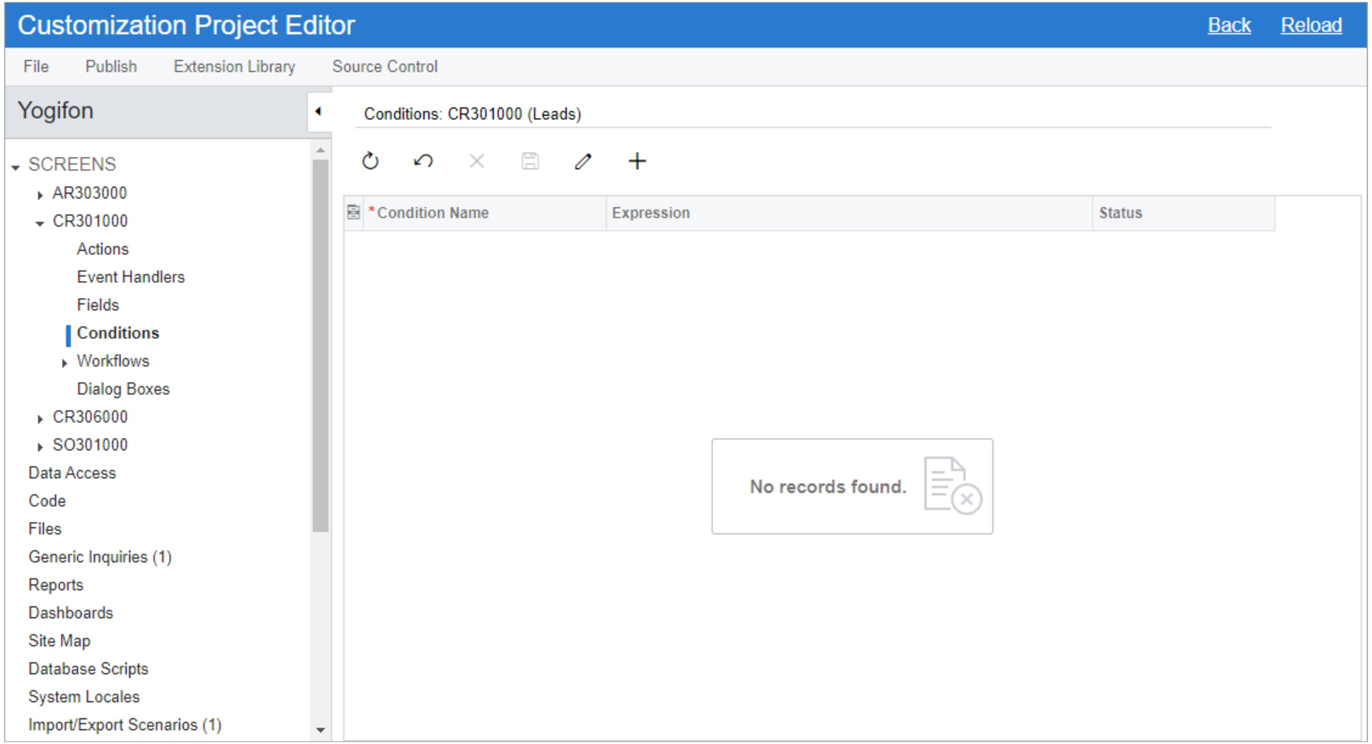


Figure: The Condition Properties dialog box

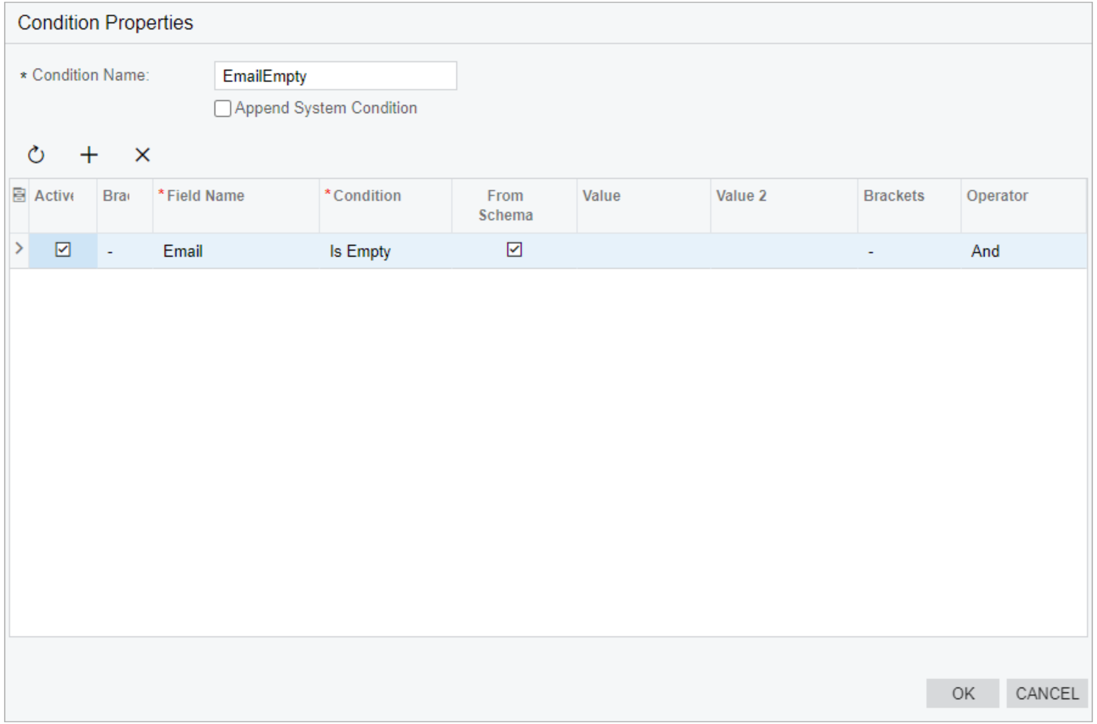
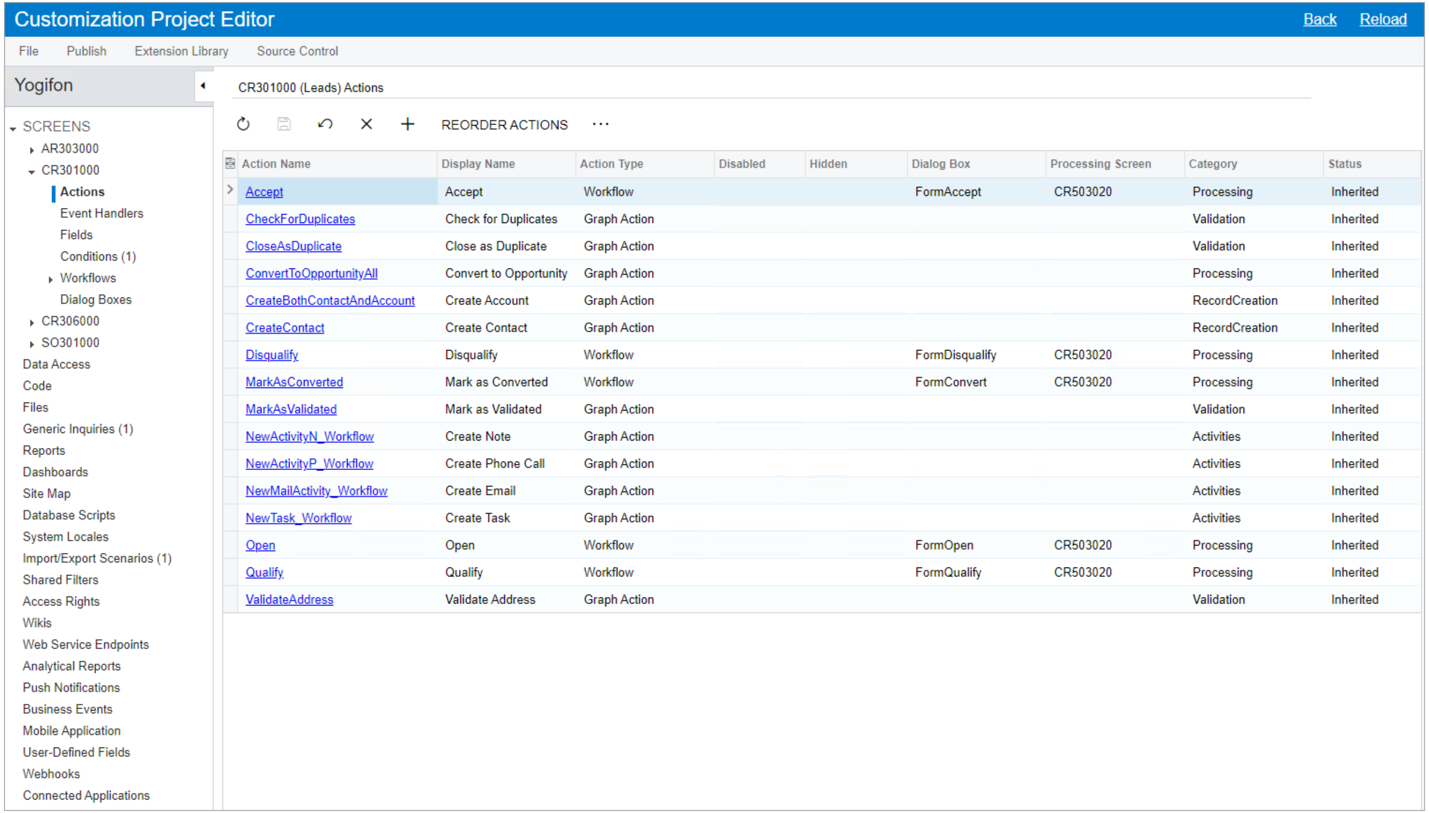


Figure: The Actions page



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

Figure: The Action Properties dialog box

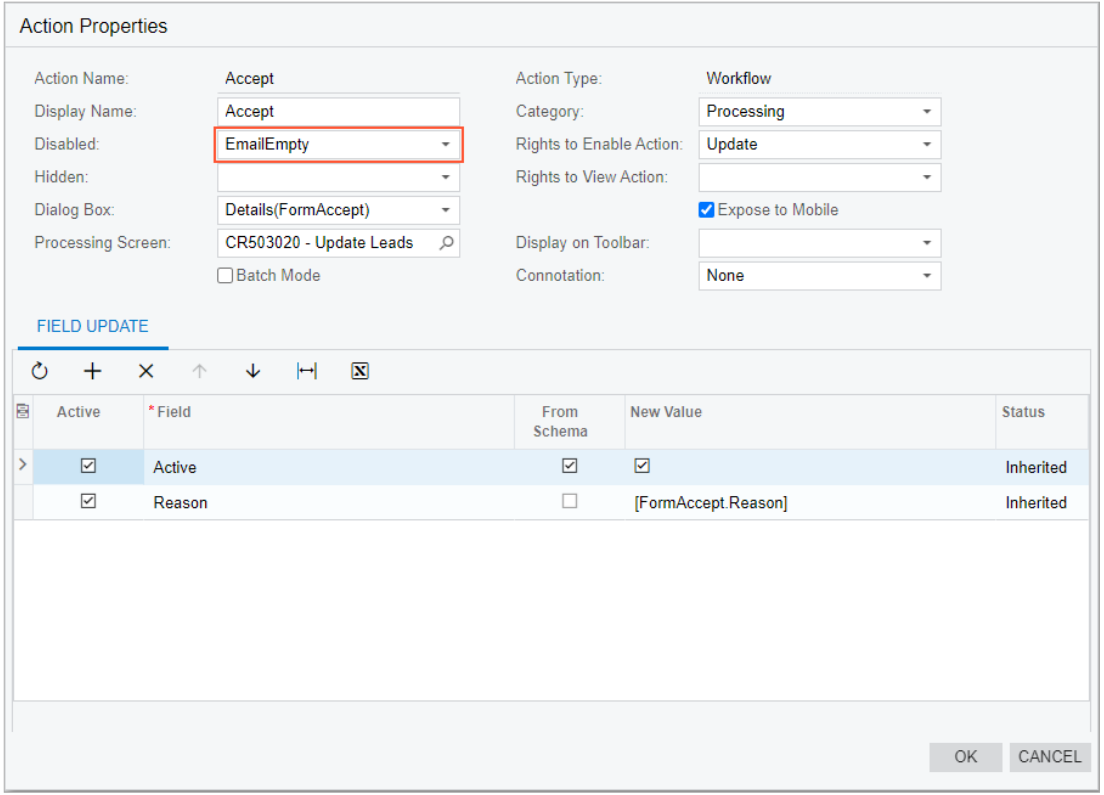


Figure: The PriorityOrSeverityHigh condition

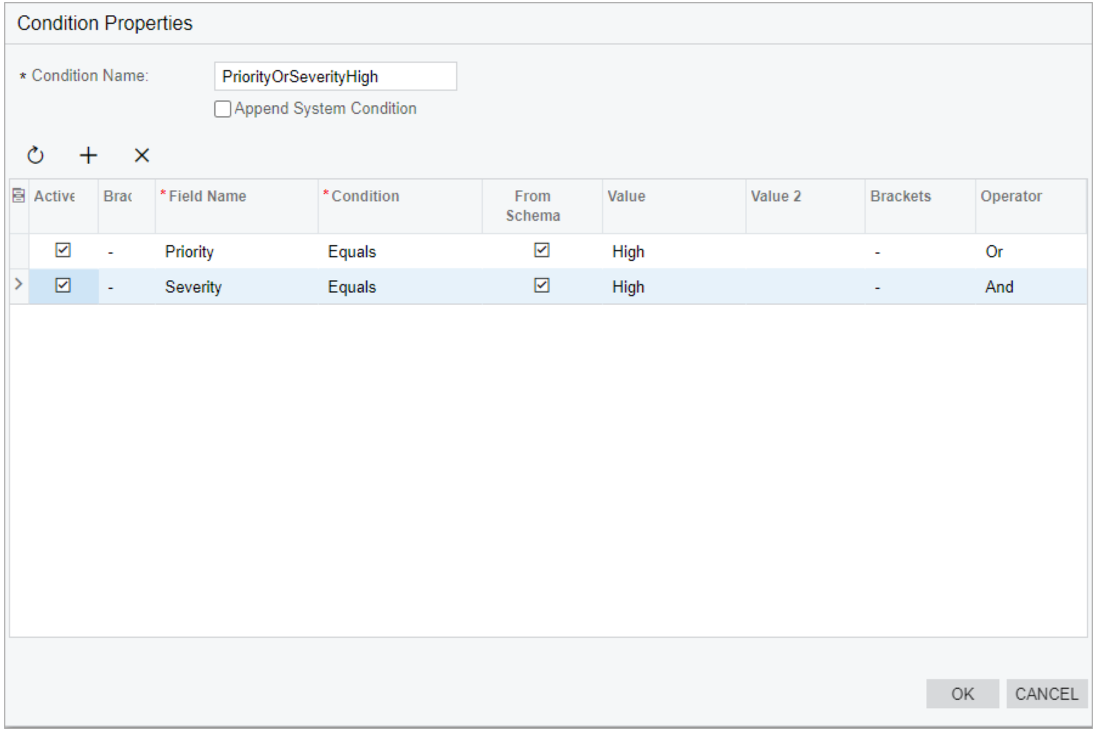


Figure: The Required property value

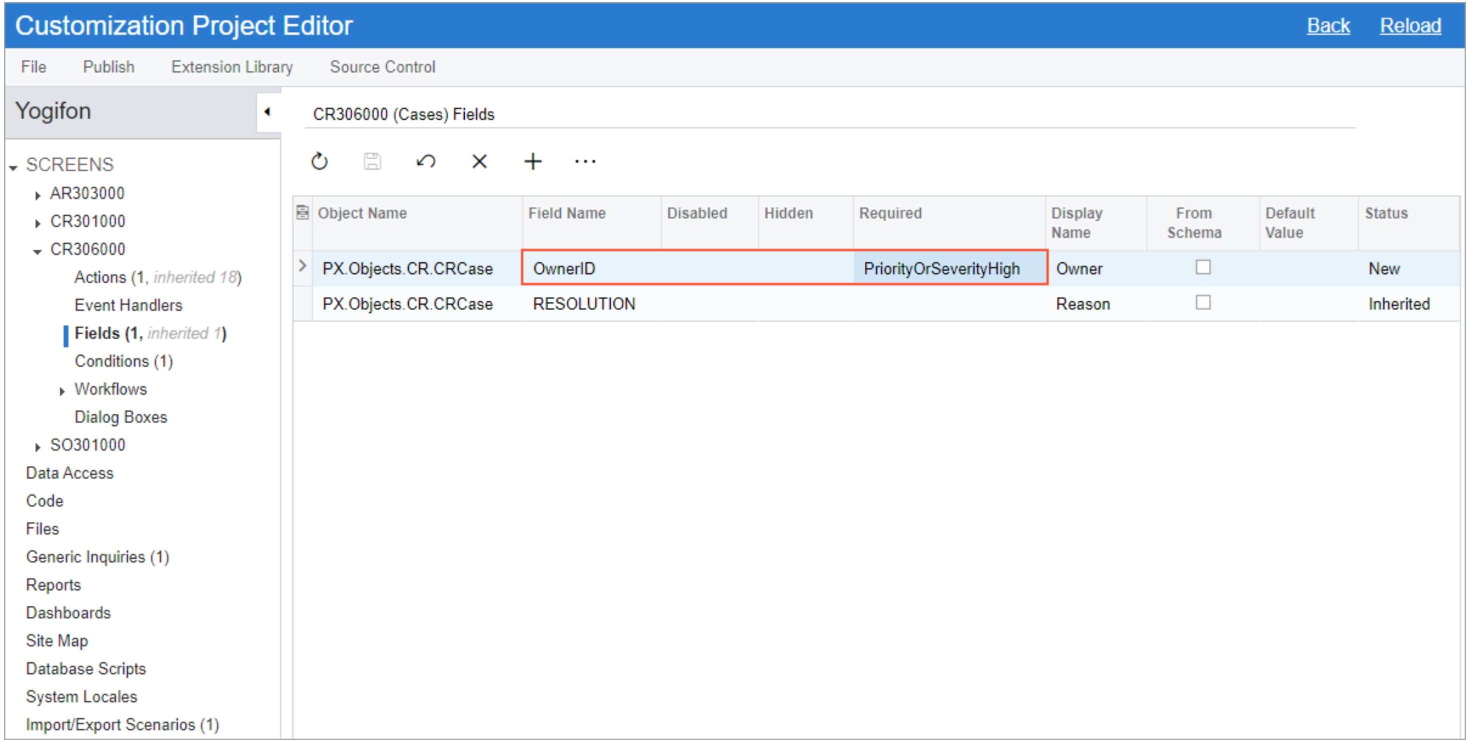


Figure: The Closing Date box

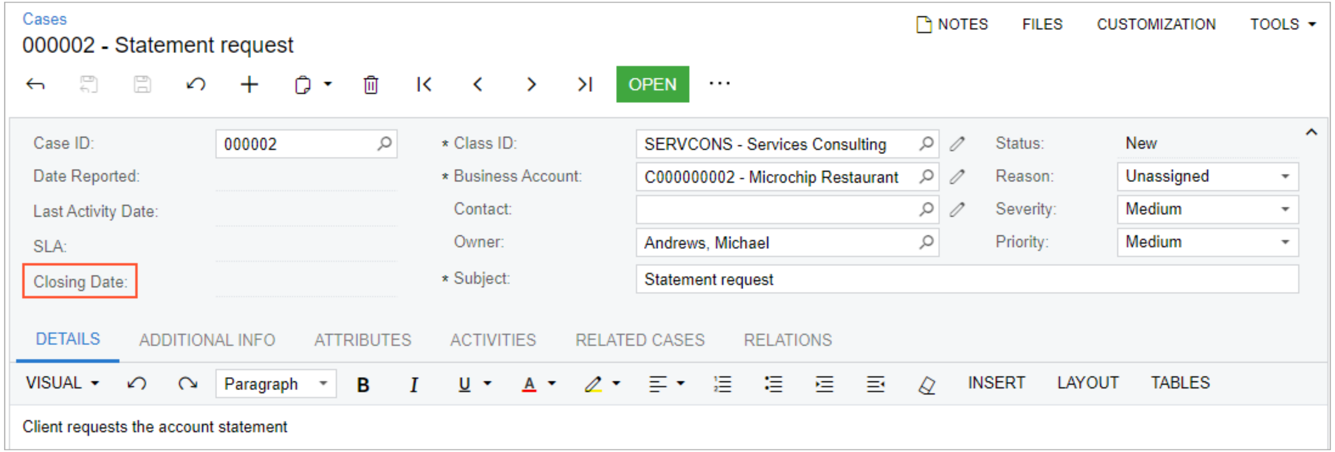


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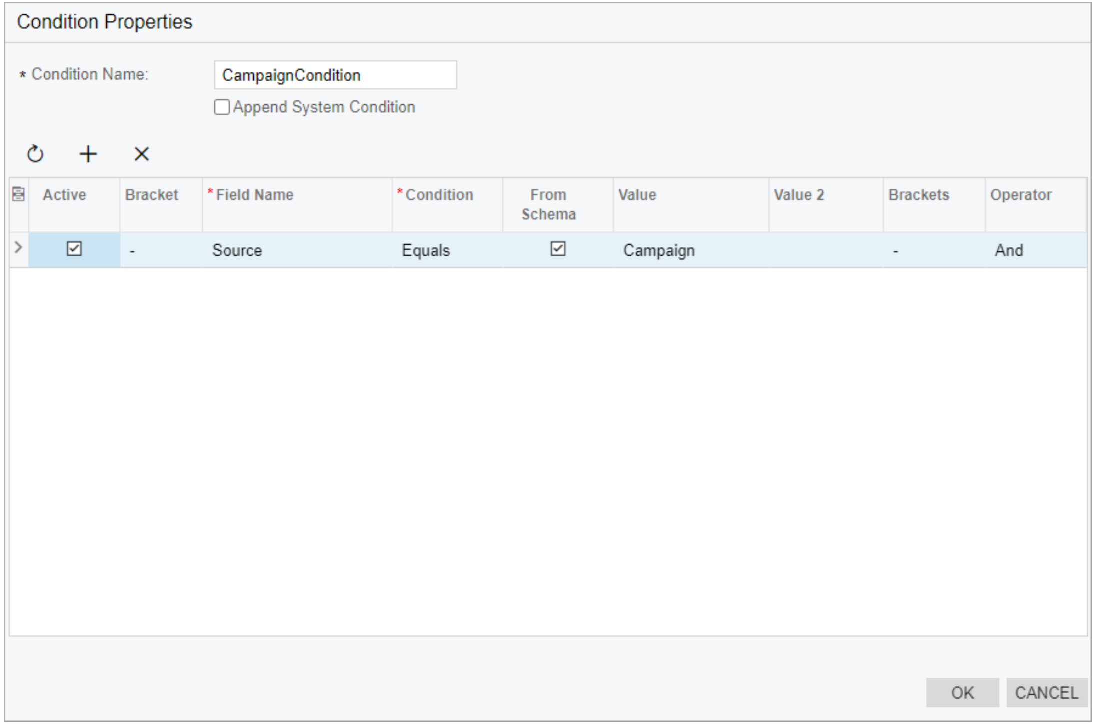
Figure: The condition



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

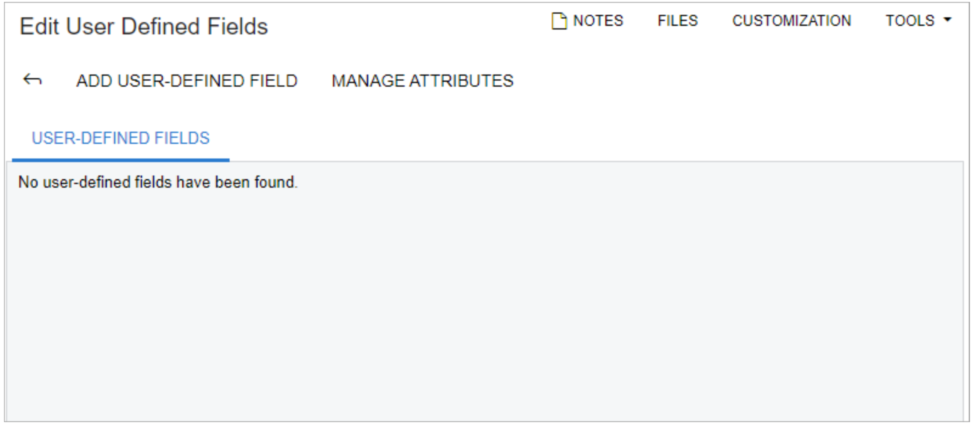


Figure: The User-Defined Field Parameters dialog box

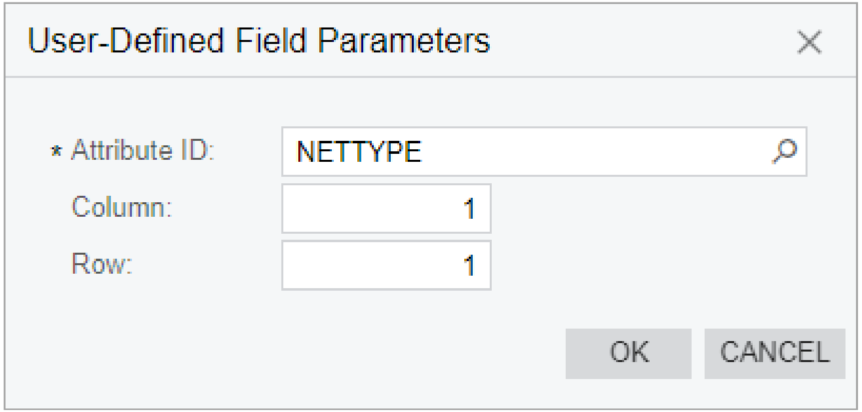


Figure: The Network Type box

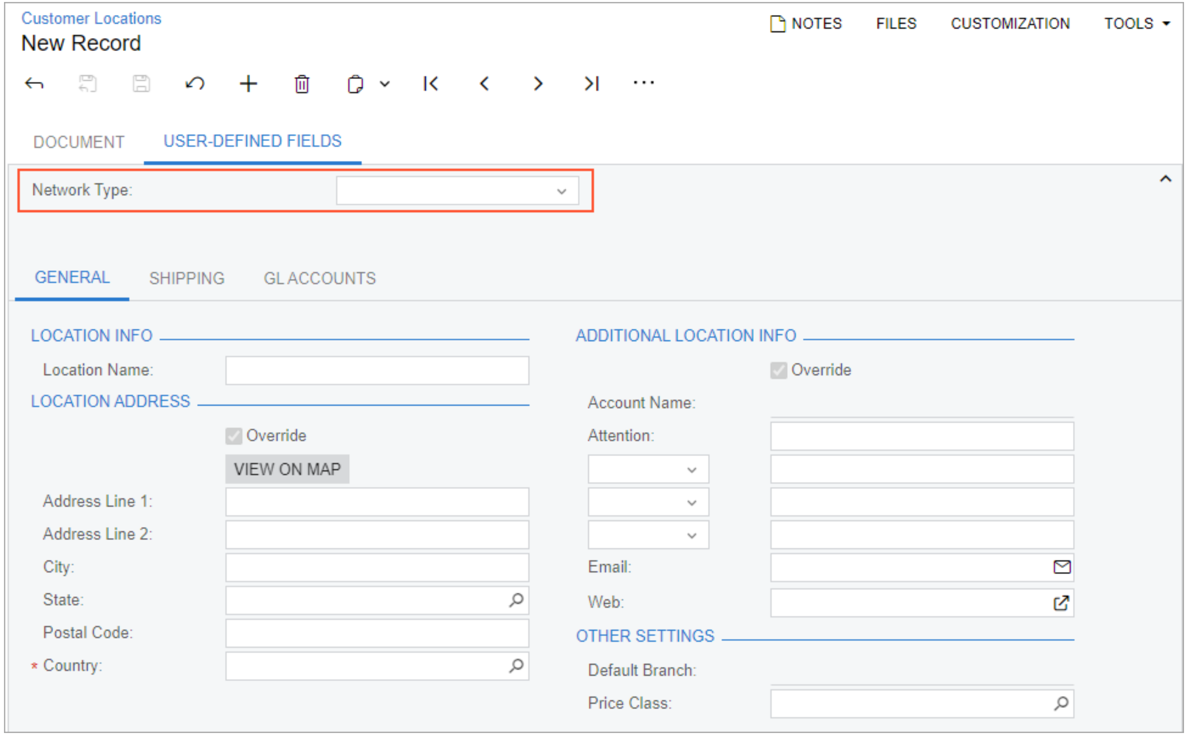
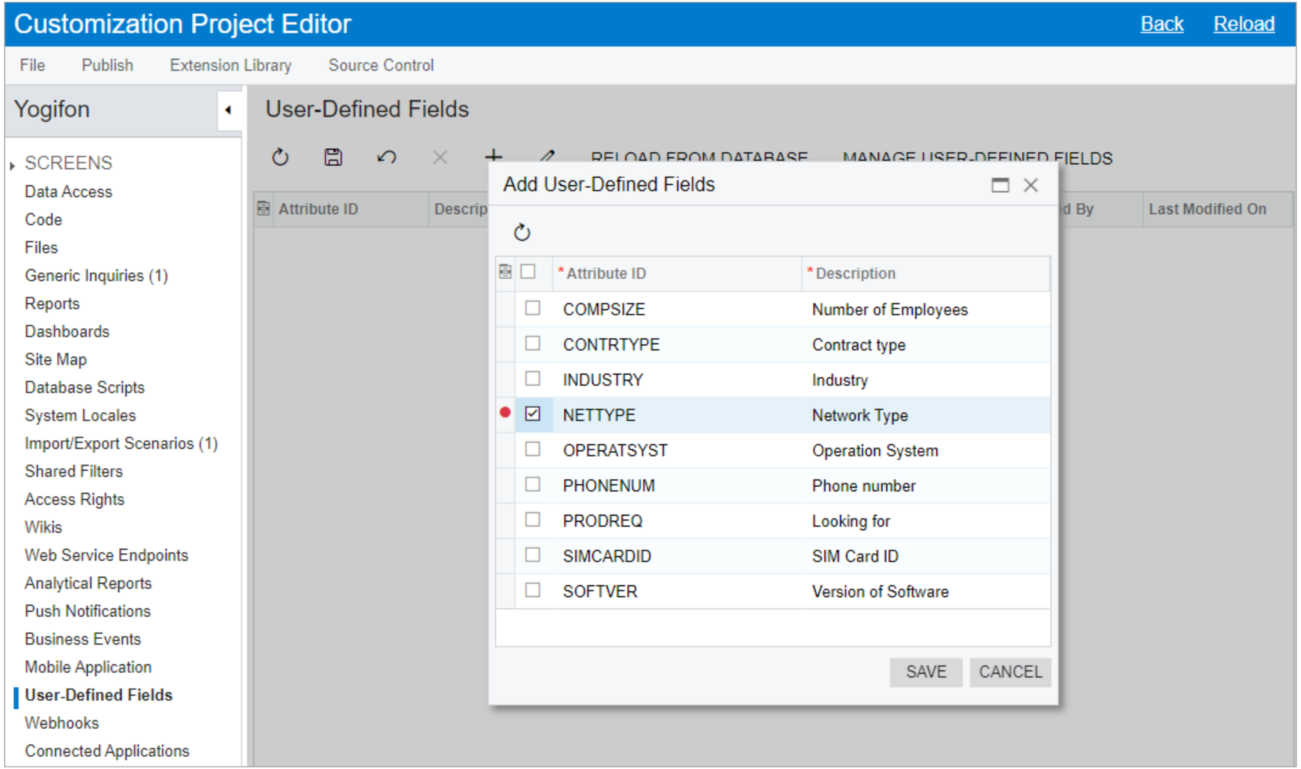


Figure: The Add User-Defined Fields dialog box



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

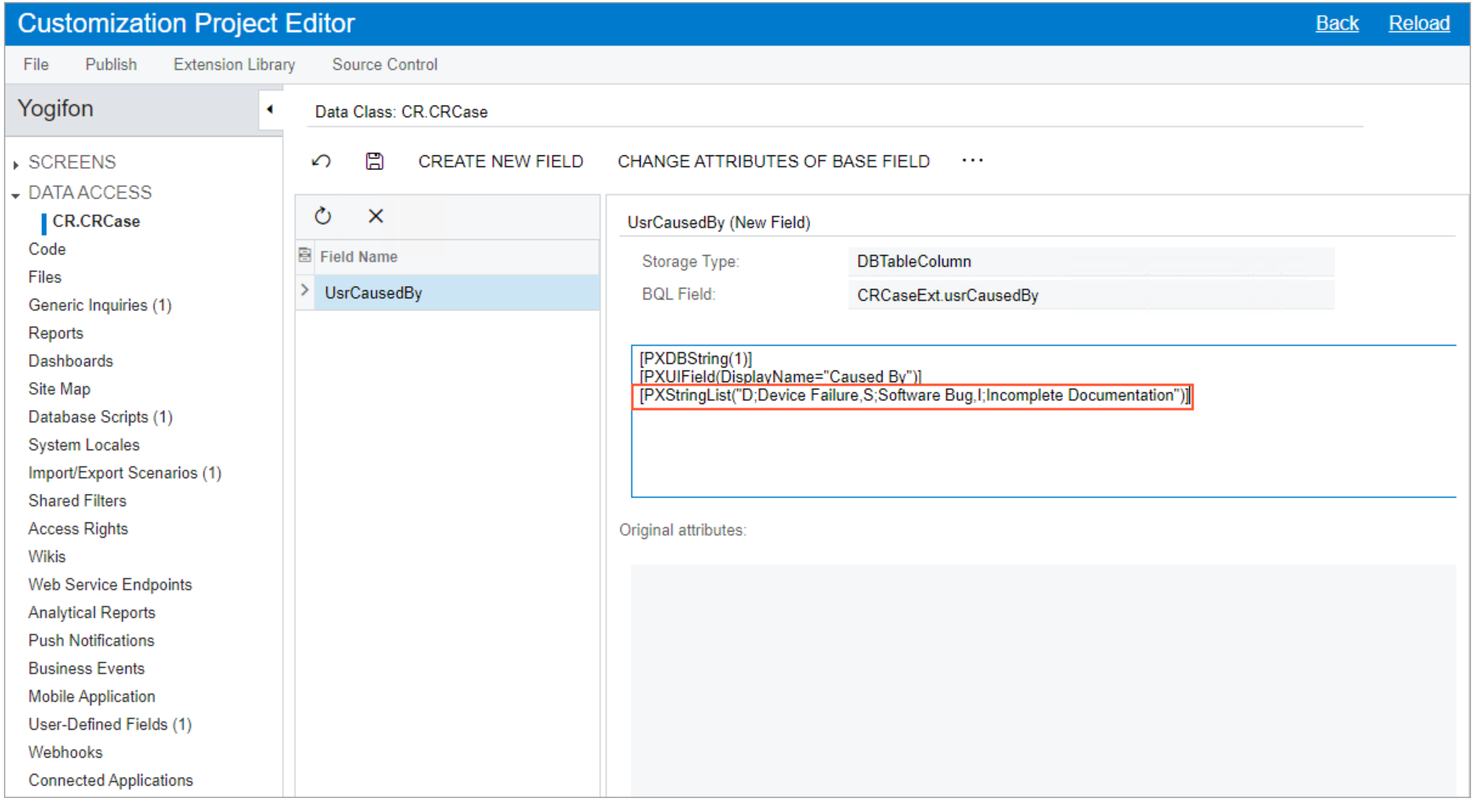


Figure: The generated script on the Database Scripts page

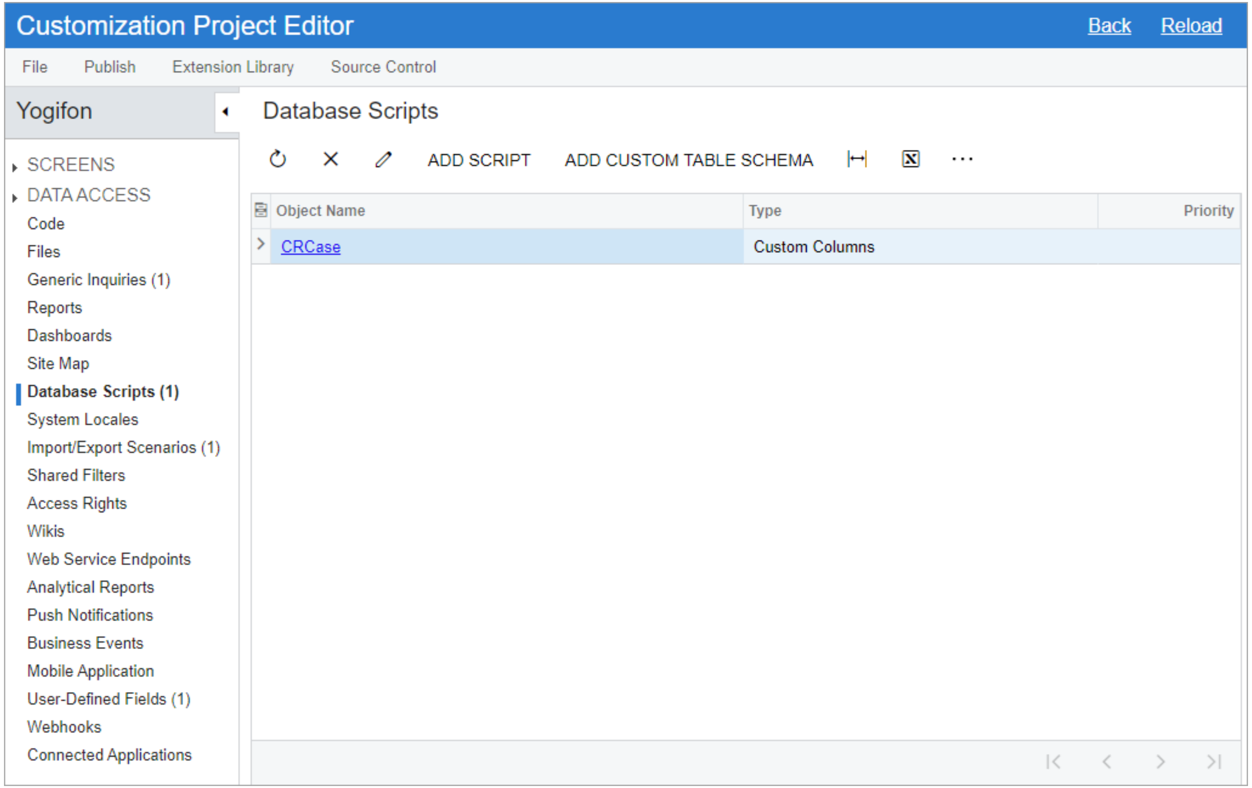


Figure: The added Resolution tab

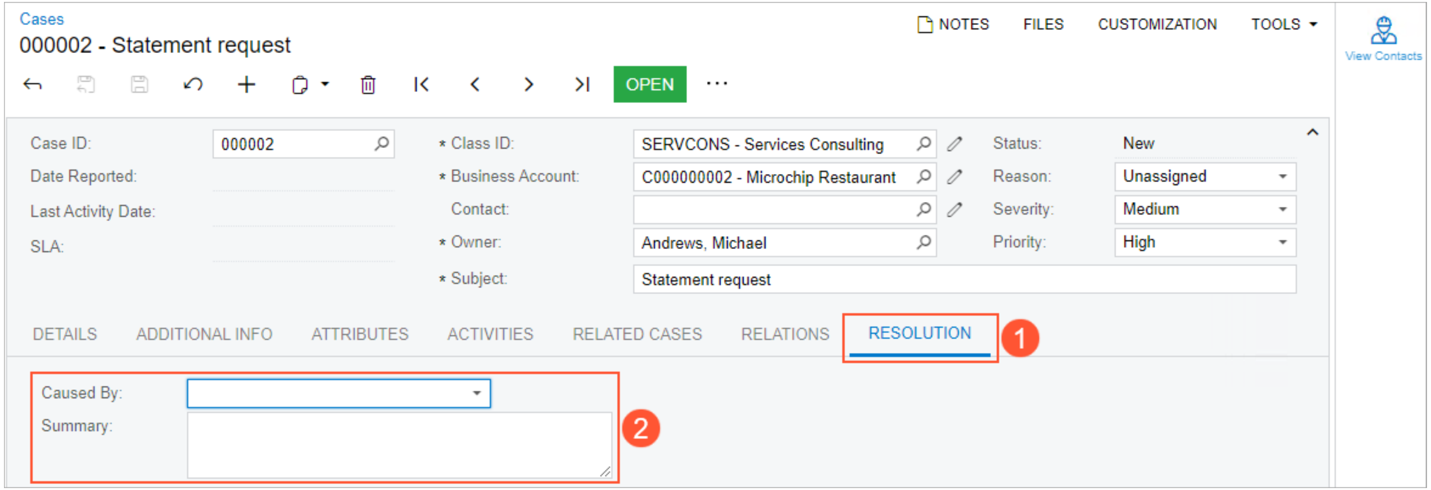
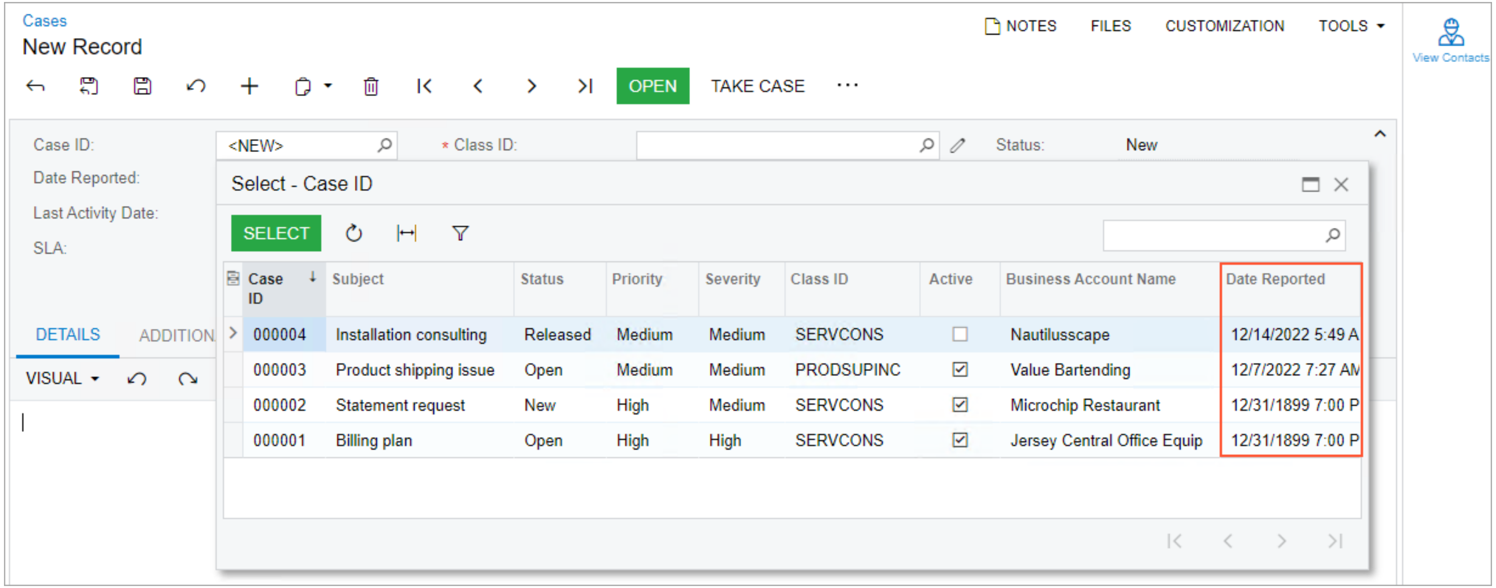


Figure: The added Date Reported column



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

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

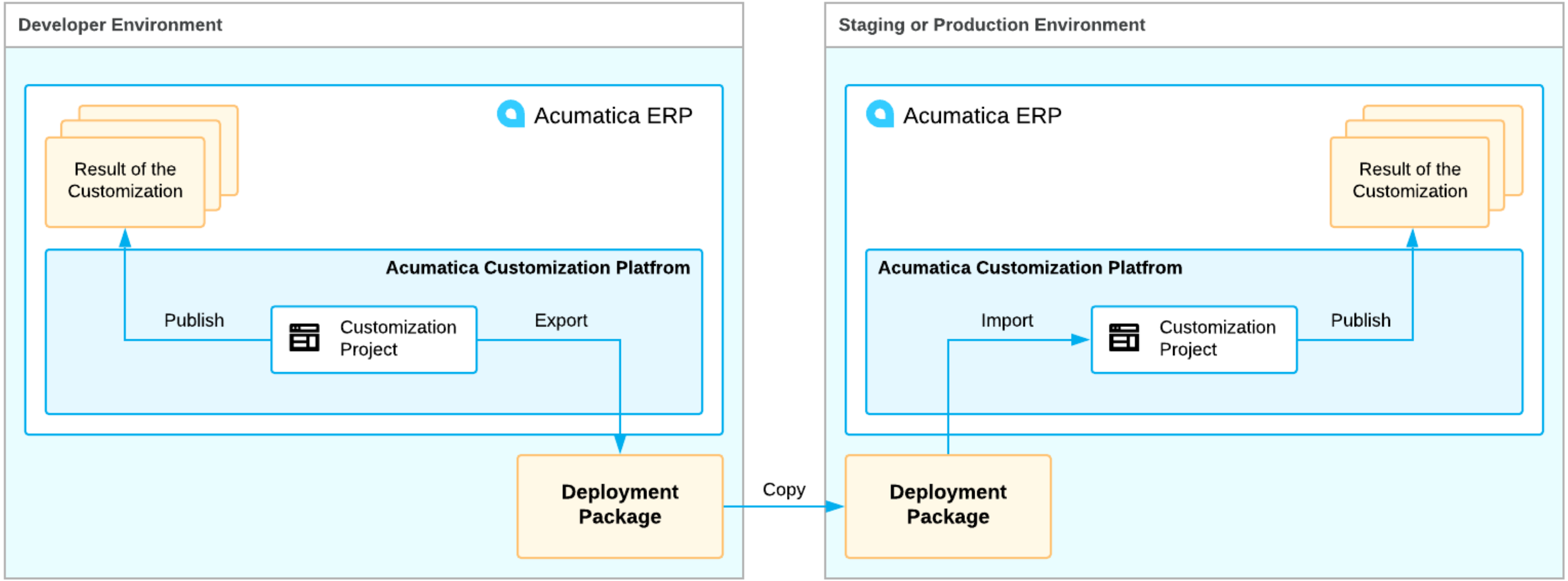
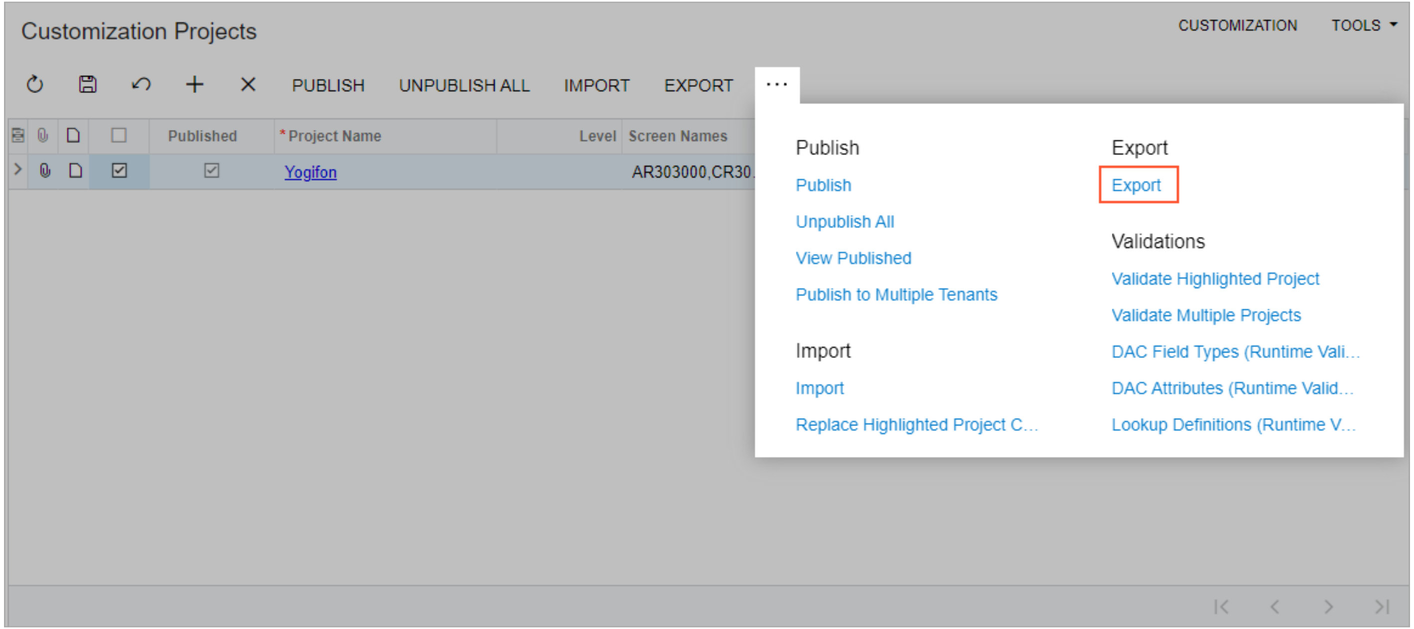


Figure: The Export command for the Yogifon project



Lesson Summary

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

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

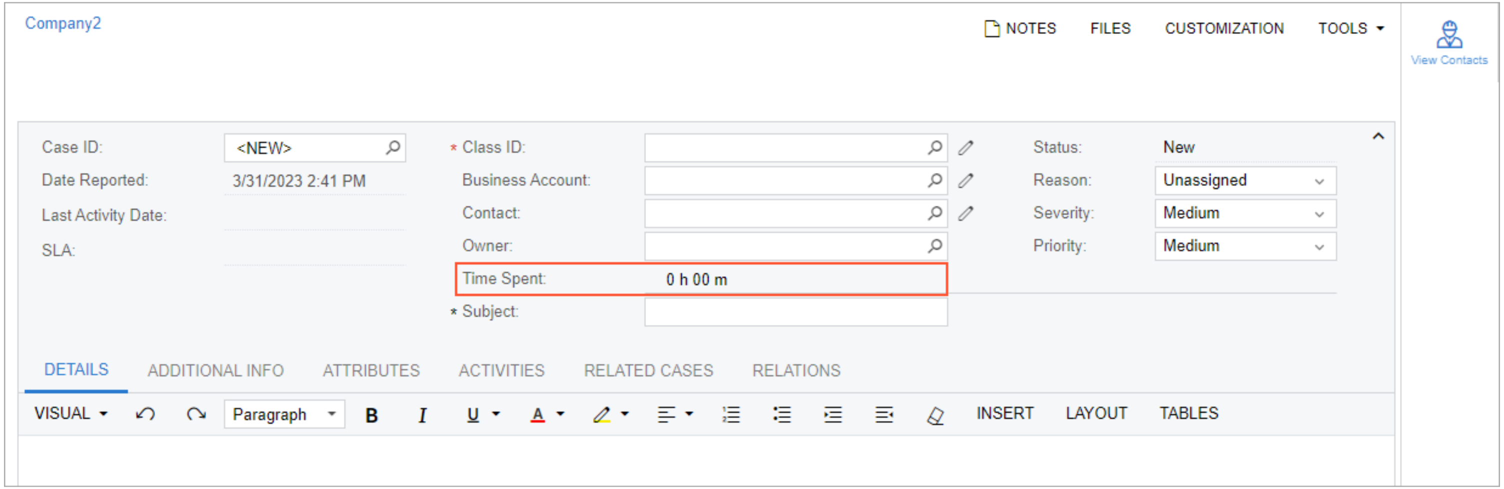


Figure: Selection of projects for publication

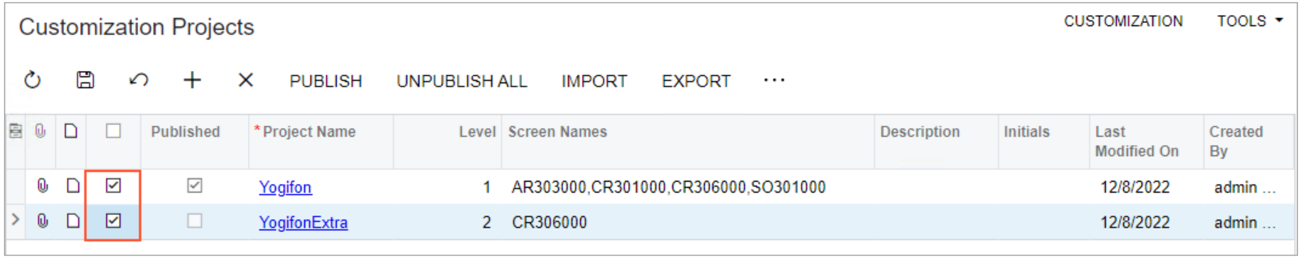


Figure: Selecting Publish in the Compilation pane

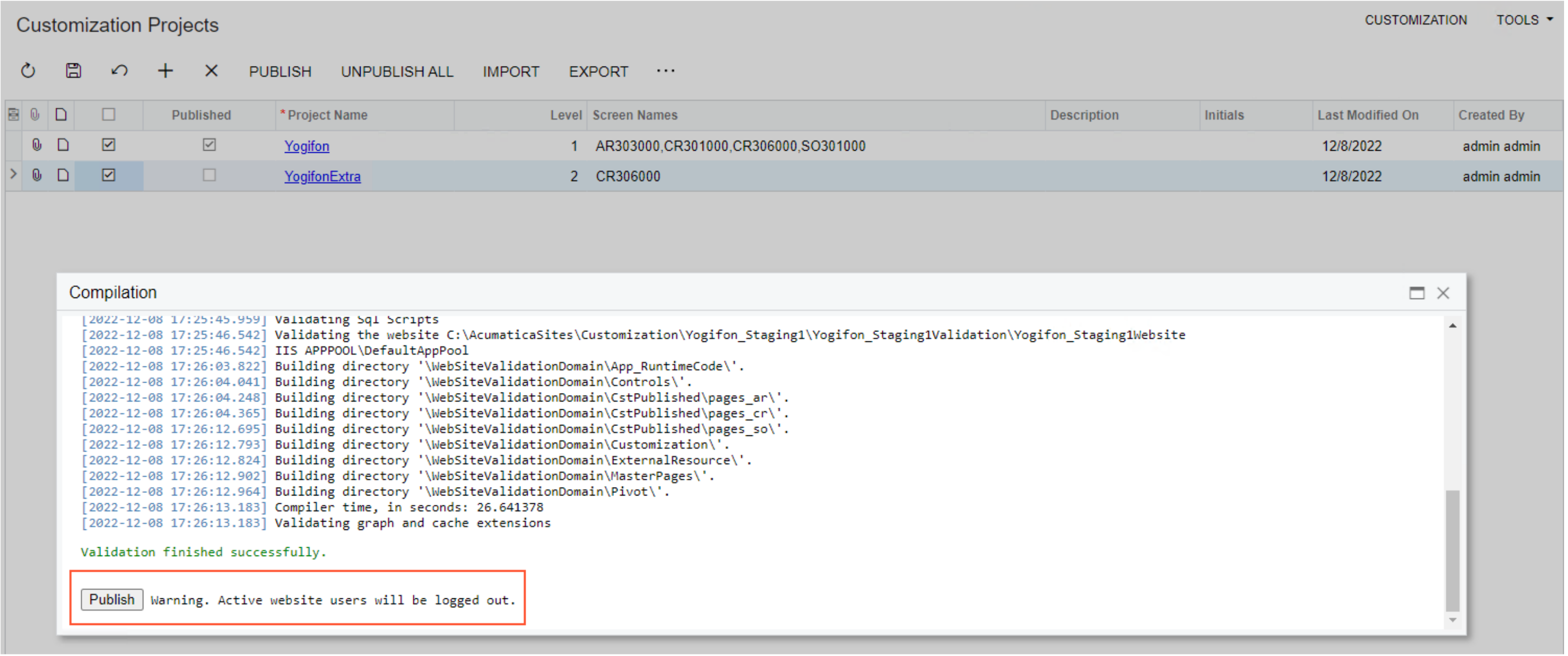
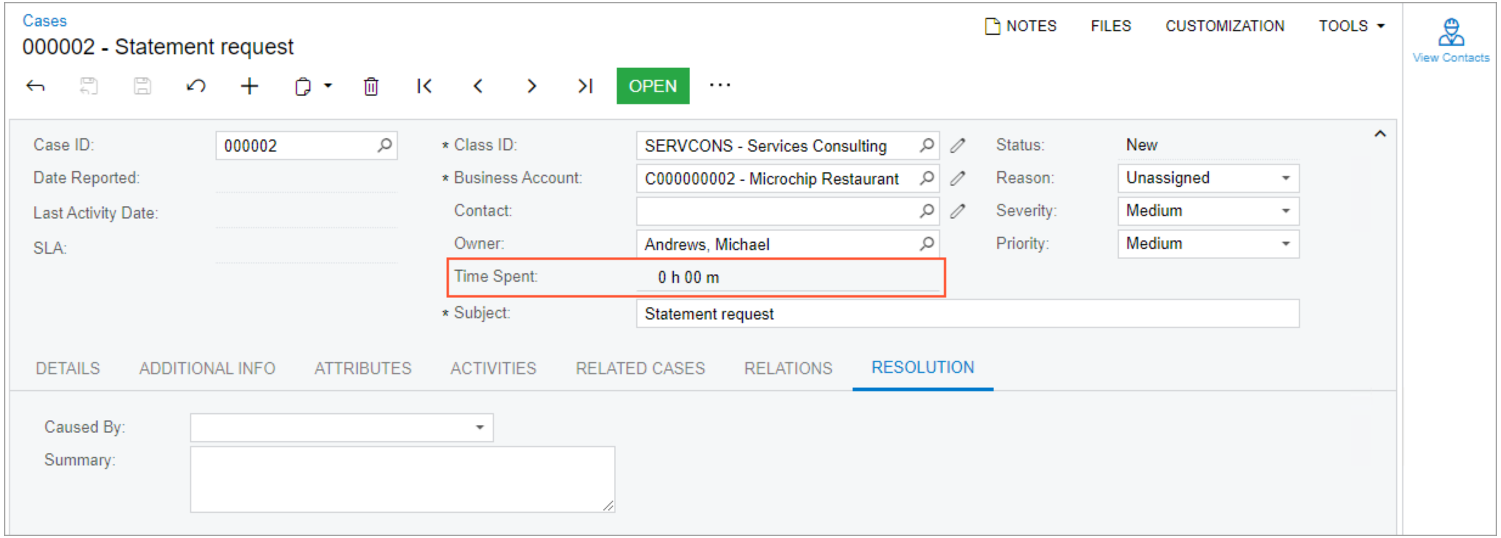


Figure: Verification of the customized Cases form



Lesson Summary

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

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

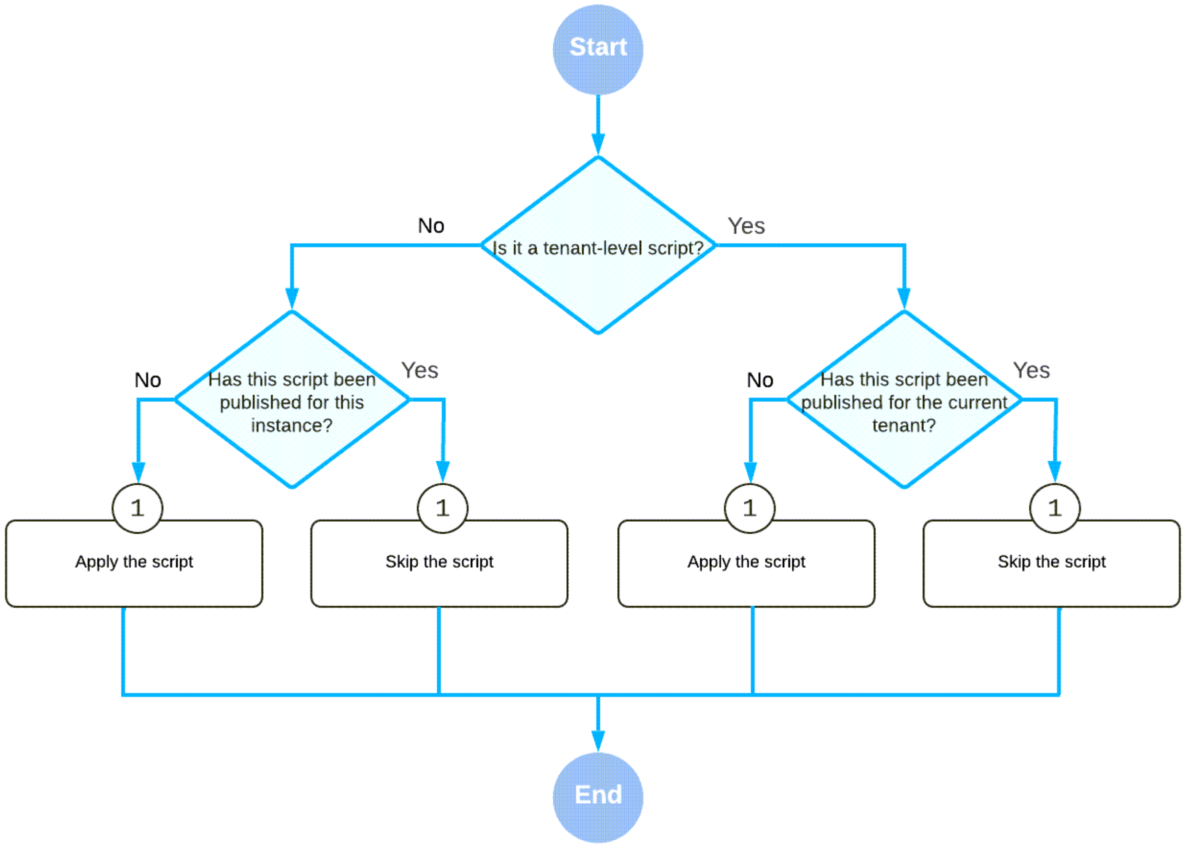
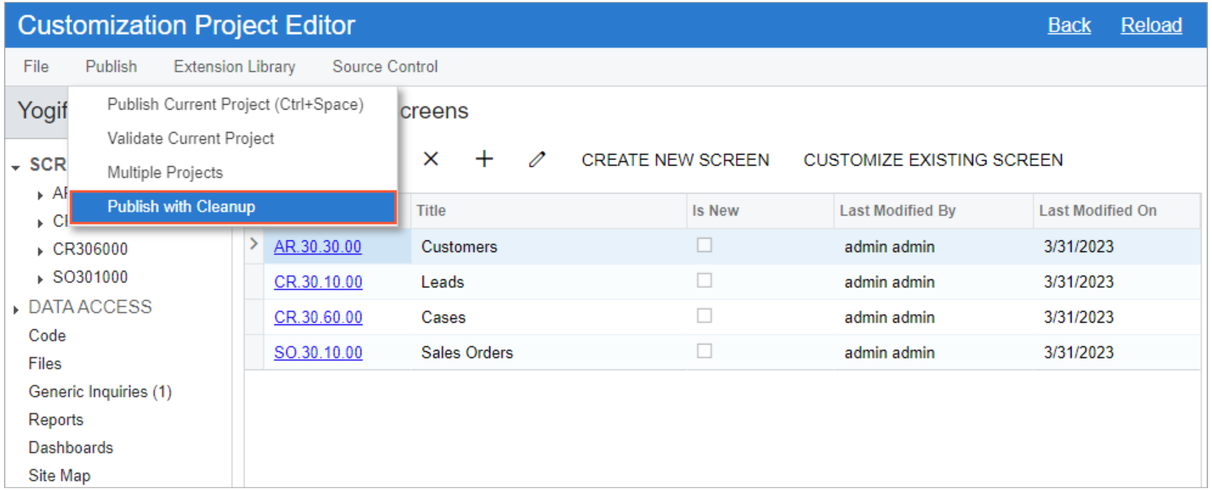


Figure: Publishing of a customization project with the cleanup operation



Lesson Summary

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

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

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

Learning Objectives

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

- Unpublish your customization project or projects.

Lesson Summary

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

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