Modern UI Overview

Acumatica
The Cloud ERP

Contents

Modern UI: Overview

Acumatica ERP 2025 R1 launches the highly anticipated release of the Modern UI. This version introduces the Modern UI in a controlled fashion that includes the migration of most forms and functionality. The topics of this chapter provide an overview of all the functionality and capabilities that are now available with this release of the Modern UI.

Note that some functionality that is available in the Classic UI may not yet be available in this release of the Modern UI. For details, see *Modern UI: Functionality That Is Not Yet Supported*.

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Modern UI: Changes in UI Elements

In Acumatica ERP 2025 R1, the Modern UI—a new technology of the user interface for Acumatica ERP forms —has been introduced. Key benefits of the Modern UI include the following:

- An improved look and feel, with important information easier to find at a glance
- Faster performance
- The ability to personalize forms to fit your specific workflows and information needs
- A responsive layout that adapts seamlessly to the device you are using

In the following sections, you will find information about the notable improvements to the user experience.

Responsive Layouts

Because more users access Acumatica ERP from mobile devices, the Modern UI was designed to be more mobile-friendly. In the Classic UI, forms have fixed layouts and UI elements have predefined sizes, which may look odd on some devices. The system's appearance in Modern UI is visually appealing on any device because it features flexible layouts, with forms and UI elements to adapted to different screen sizes. The following screenshots demonstrate how the same form looks on tablets in Classic UI and in Modern UI.

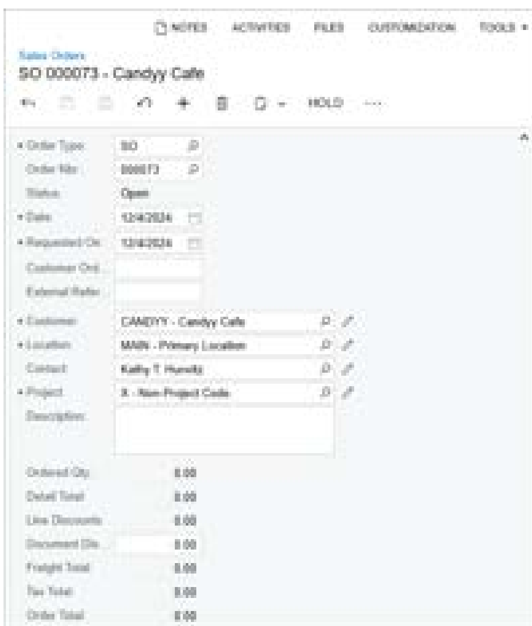


Figure: Classic UI

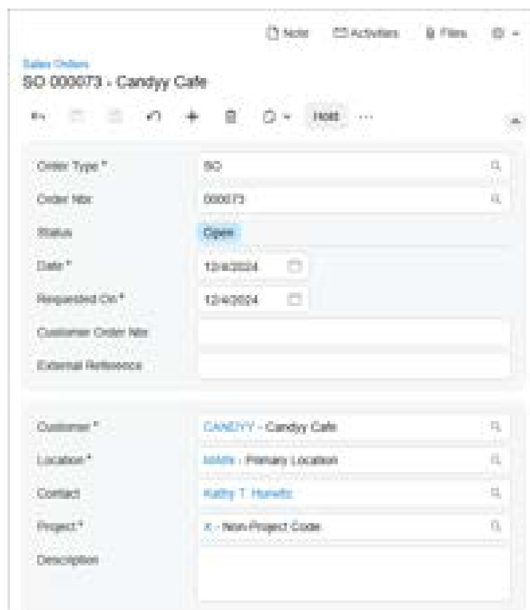


Figure: Modern UI

Form Title Bar Menus

Every Acumatica ERP form in the Classic UI displays the **Customization** and **Tools** menus on the form title bar. In the Modern UI, these two menus have been combined into the Settings menu so that you can find the needed menu commands in one place. (See the following screenshots.)

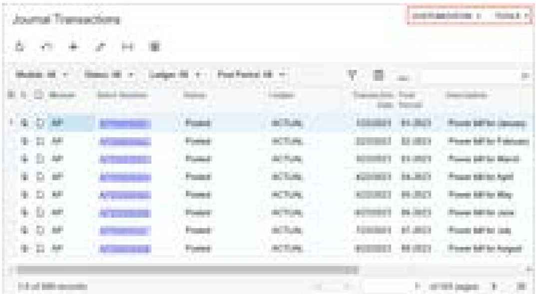


Figure: Classic UI

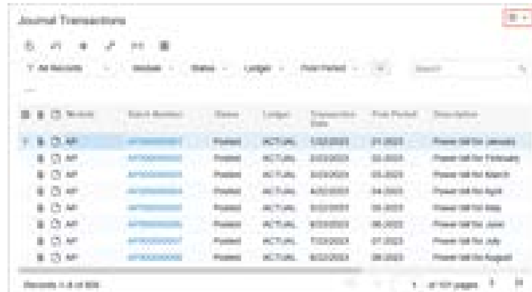


Figure: Modern UI

Grouped Fieldsets

In the Modern UI, related data entry fields are now visually grouped with color blocks (shown in the second screenshot below), enhancing clarity and making key settings easier to see at a glance. (These color blocks are not used in the Classic UI, as you can see in the first screenshot.)

Figure: Classic UI

Figure: Modern UI

Elements with Magnifier Buttons

If a box or column has a magnifier button, you can click the magnifier button to open a lookup table and select a value.

If a value has already been selected, you may want to view the selected record on the form where it has been created. In the Classic UI, you did this by clicking the Edit button. In the Modern UI, the system displays the selected value as a link for visual uniformity. When you click the link, the system opens the selected record on the creation form. The following screenshots show these changes.

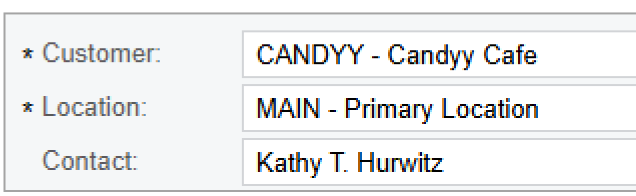


Figure: Classic UI

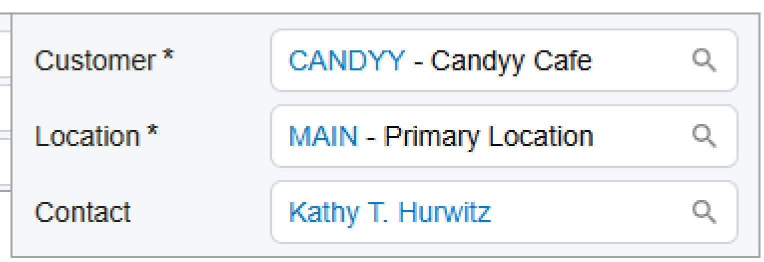


Figure: Modern UI

Depending on the control's configuration, the magnifier button, the link, or the Edit button may be hidden.

Errors, Warnings, and Informational Messages

In the Classic UI, Acumatica ERP displays errors, warnings, and some informational messages by using the browser's modal dialog boxes. The Modern UI displays these messages in the form's upper-right corner. (See the following screenshots.)

Figure: Classic UI

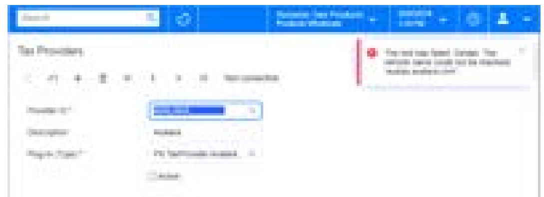


Figure: Modern UI

In the Classic UI, informational messages are displayed as regular text, as shown below. In the Modern UI, informational messages are now highlighted in color to make them easier to notice (also shown below).

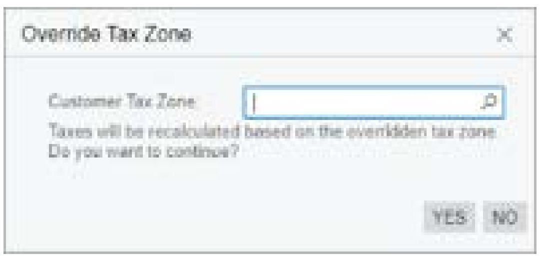


Figure: Classic UI

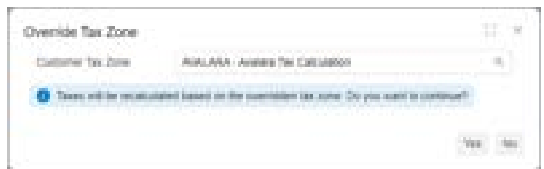


Figure: Modern UI

Errors and Warnings in Table Values

In the Classic UI, when an incorrect value is entered in a table, an error icon appears next to the tab name (if applicable) and beside the cell containing the incorrect value. (See the first screenshot below.) Similarly, if there is a warning related to a cell value, a warning icon will be displayed next to both the tab and the cell. To view the description of the error or warning, you hover over the respective icon.

In Modern UI, when there is an error or warning message related to a table value, the system displays an error or warning icon next to the tab name and beside the cell containing the incorrect value; it also highlights the entire row with the error. To view the description of the error or warning, you hover over the icon or the highlighted row. (See the second screenshot below.)

Figure: Classic UI

Figure: Modern UI

Numeric Columns in Tables

In the Classic UI, numeric values in table cells are truncated to fit the column width (shown in the first screenshot below). In the Modern UI, when a numeric value does not fit the column width, it is replaced with the # characters (shown in the second screenshot). This explicitly indicates that the respective values did not fit. To see the actual value, you hover over the cell, and the value is displayed as a tooltip.

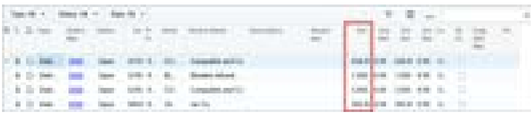


Figure: Classic UI

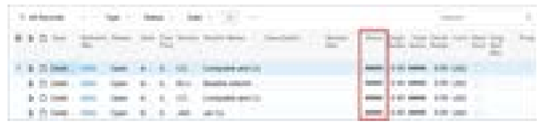


Figure: Modern UI

A Single View of Data

For some tables, in the Classic UI, you can switch between a grid view and form view of the data, as shown in the following screenshot. The grid view is a standard table view, with all details arranged in a table and each row representing one detail. The form view shows a set of elements intended for only one detail or document row, and you use the navigation buttons to move to a different detail.

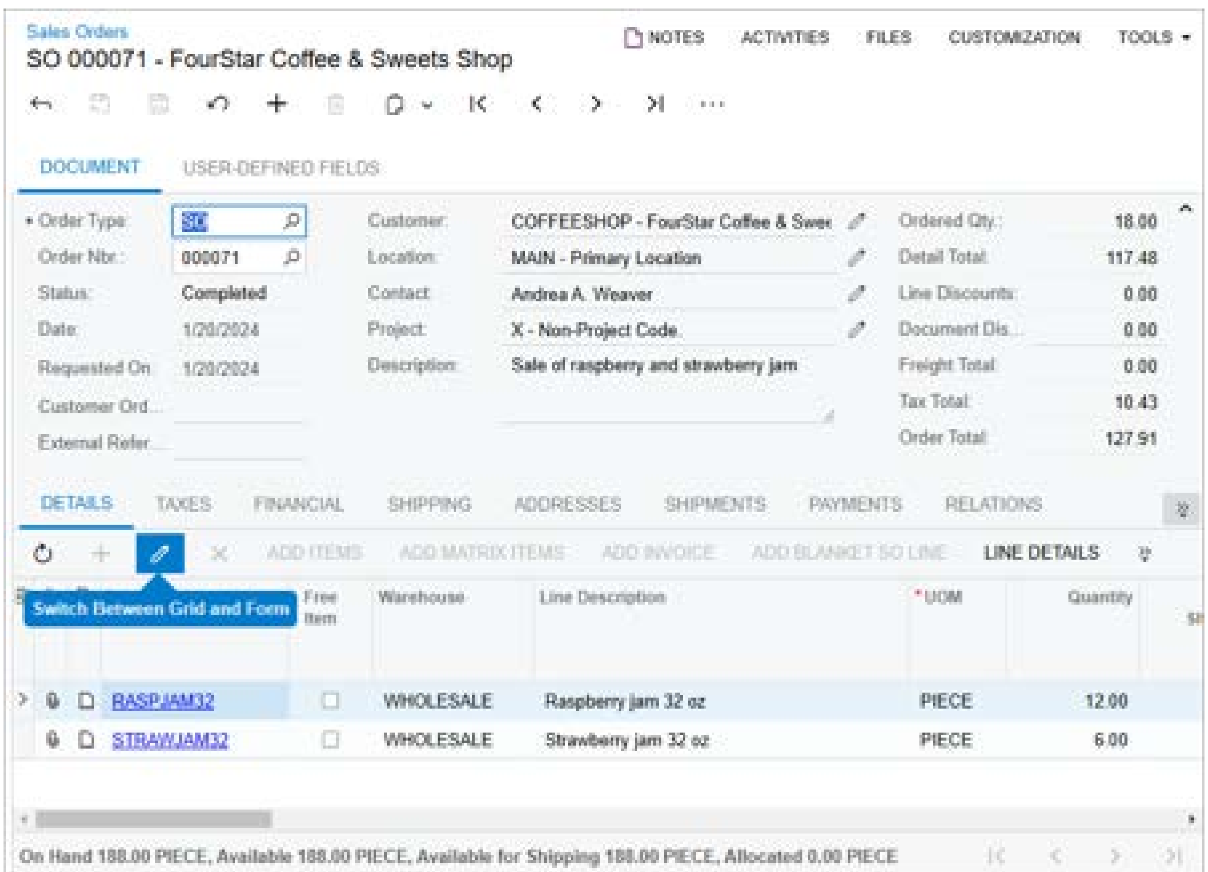


Figure: Classic UI

In Modern UI, for simplicity, this data can be viewed and entered only in the table, as it was designed to be viewed and entered.

Table Filters

In the Modern UI, table filters have been enhanced to simplify data filtering. To learn more about these improvements, see *Modern UI: Filters*.

Multiline Text Boxes

In the Classic UI, when you press Enter in a multiline text box, a new line is inserted.

However, in the Modern UI (unless the developer has configured it otherwise), when you press Enter, the system moves the focus to the next control instead. To insert a new line in the Modern UI, you need to press Ctrl+Enter.

Modern UI: Filters

In the Modern UI, table filters have been enhanced to simplify data filtering. Additionally, a new Advanced Filter editor has been introduced.

> The existing filters for a form will remain effective even after the form is switched to Modern UI.

Filtering Area

The filtering area of Acumatica ERP forms has been redesigned. The screenshot below shows the basic elements of the filtering area for the Sales Orders (SO3010PL) list of records.

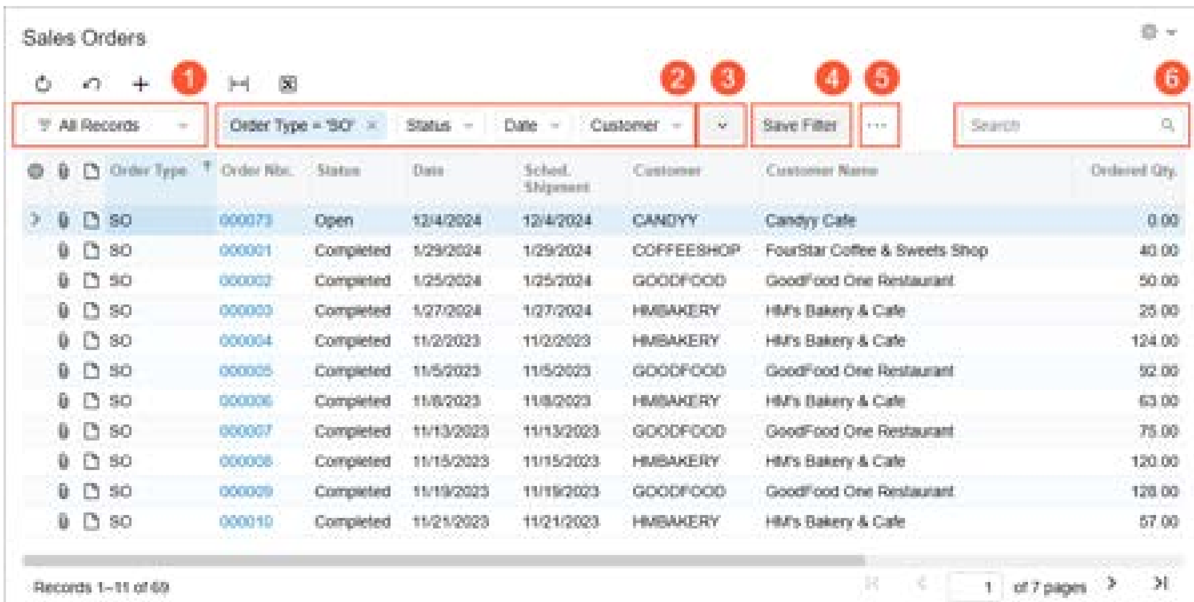


Figure: Basic elements of the filtering area

1. The Filter List button, which you can click to display a list of saved personal and shared filters.
2. The Quick Filter buttons, which you can click to define quick filter criteria, specify the sorting order, or remove the Quick Filter button for the respective data fields.
3. The **Add Quick Filter** button, which you can click to add more Quick Filter buttons for data fields or to open the Advanced Filter editor.
4. The **Save Filter** button, which you can use to save the filter for future usage. This button is visible only when the current filter has not been saved.
5. The More (•••) button, which you can click to execute menu commands for managing filters.
6. The Search box, which you can use to enter a string to highlight cell values that include the search term. By default, the maximum length for the search string is 100 characters, and the system uses the *Contains* condition to perform the search.

Filter List

In the Modern UI, saved personal and shared filters are listed in a special Filter List drop-down menu, instead of as filter tabs as in Classic UI. To open the list of filters, click the Filter List button in the filtering area, as shown in the screenshot below.

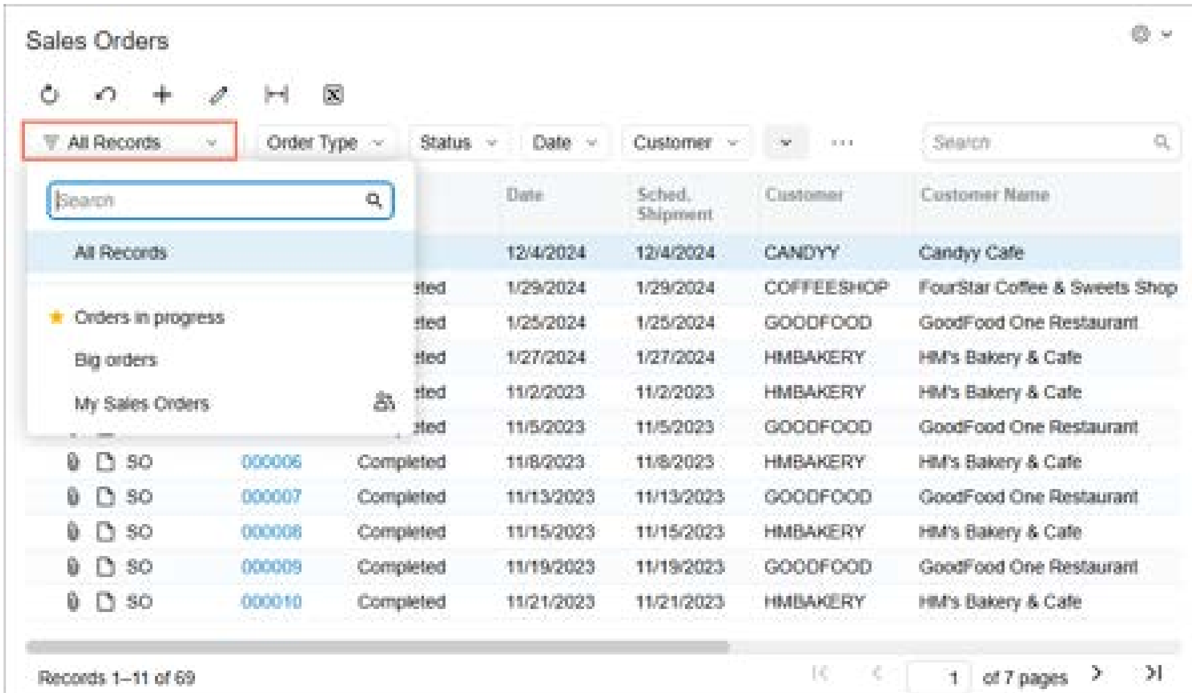


Figure: Filter list drop-down menu

In the Filter List drop-down menu, you can perform basic actions as follows:

- To apply one of the filters, click the filter name in the list.
- To search for a filter, type its name in the search box.
- To mark a filter as a favorite, hover over the filter name and click the star icon. Favorite filters are displayed at the top of the list.

Filters shared between all users of Acumatica ERP are denoted with the icon in the Filter List drop-down menu.

Quick Filters

A quick filter is a reusable filter that you can apply to data fields in a particular table. You can apply multiple quick filters simultaneously; if you do, you will see multiple Quick Filter buttons in the filter area. If you click one of these buttons, the Quick Filter drop-down menu will open, as shown in the screenshot below.

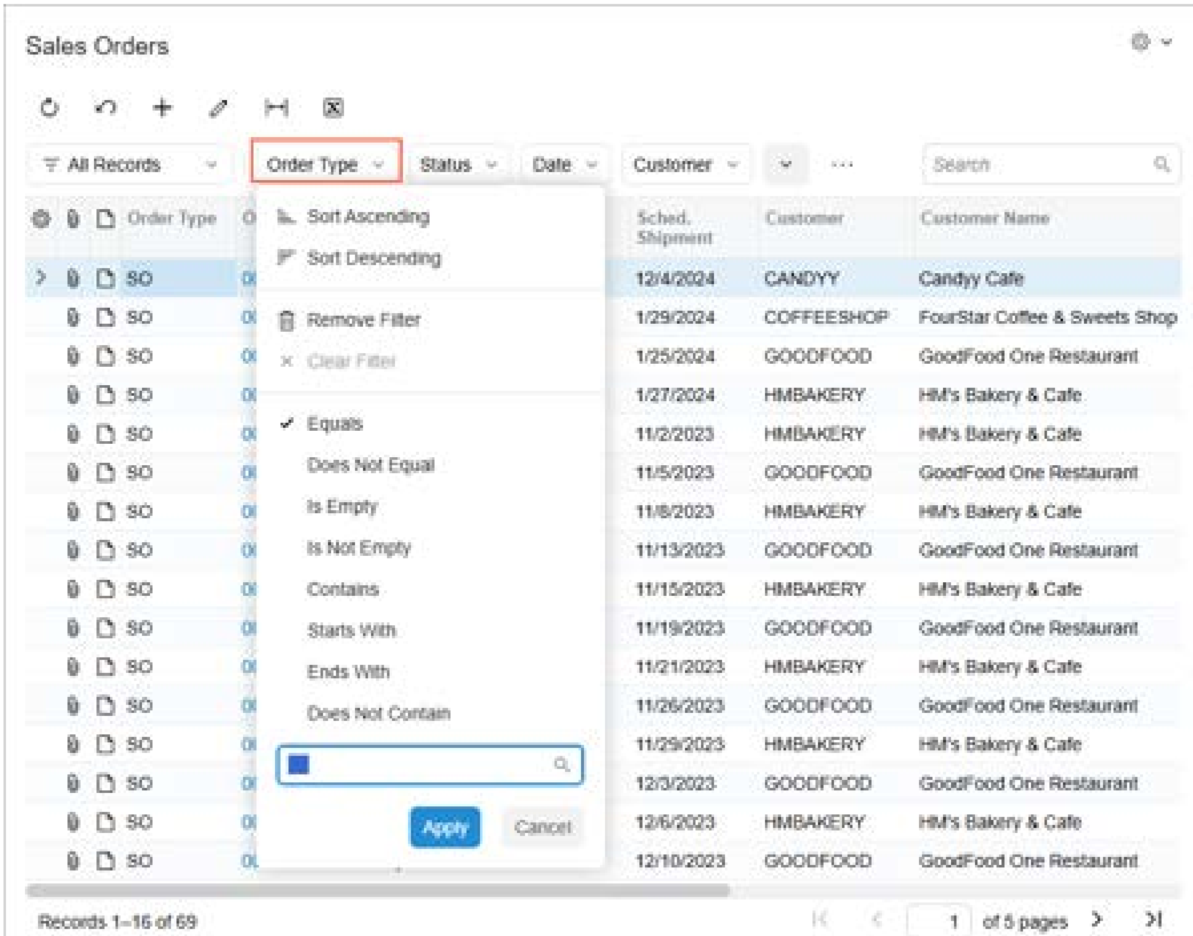


Figure: Quick Filter drop-down menu

In the Quick Filter drop-down menu, you can act upon filters as follows:

- To sort the table rows by the values of the selected data field, click **Sort Ascending** or **Sort Descending**.
- To specify filter criteria, select the conditions, specify the desired value (if needed), and click **Apply**. The list of available conditions and values varies depending on the data field type.
- To discard filtering by the respective data field, click **Clear Filter**.
- To remove the Quick Filter button for the selected data field, click **Remove Filter**.

You can also rearrange the order of Quick Filter buttons in the filtering area by dragging the button to the desired position.

To add a Quick Filter button for a particular column, do one of the following:

- Drag the column header to the filter area.
- Click the **Add Quick Filter** button, and select the name of the needed data field in the dialog box that opens.
- Click the column header, specify the filter conditions and value, and click **Apply**. This will add the Quick Filter button and apply the specified filter criteria.
- Click within the cell and press Shift+F. This will add the Quick Filter button and filter the contents by the value of the selected cell.

Operations with Filters

To keep the filter criteria for future usage, or to share the filter with other users, do either of the following:

- Click the **Save Filter** button. This button is visible only when the current filter has not been saved.
- Click the More (···) button in the filter area and then click the **Save As** command.

Either of these actions will open the **Save Filter As** dialog box, which is shown in the following screenshot.

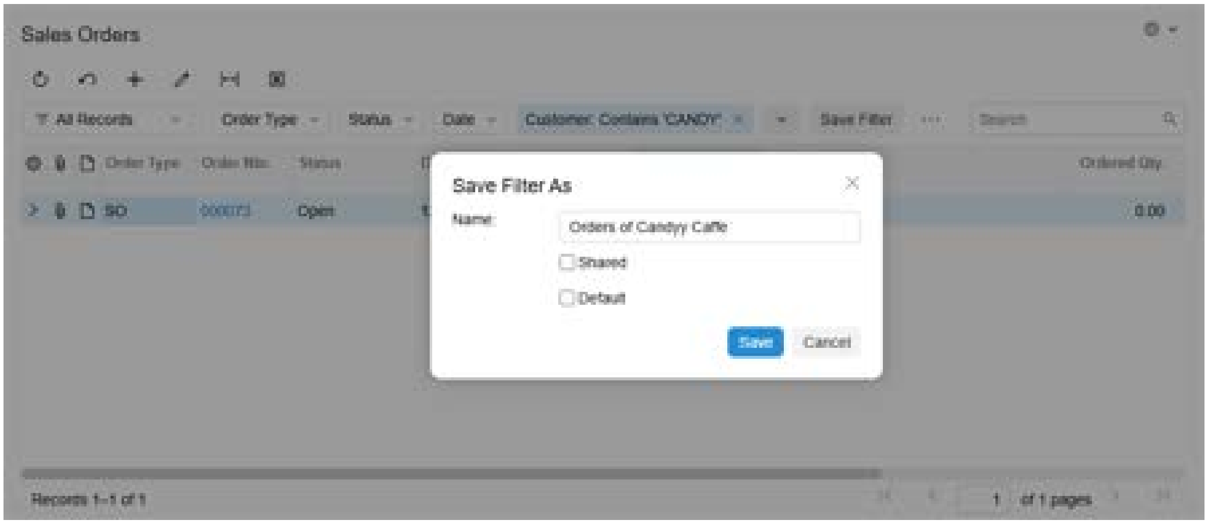


Figure: Save Filter As dialog box

In the dialog box, you specify the name of the filter and click **Save**. Additionally, you can make the system apply this filter each time you open the form by selecting the **Default** check box before you click **Save**. Also, if you have access to the *Filters* (CS209010) form, you can make the filter available to other users by selecting the **Shared** check box before you click **Save**.

Saved personal and shared filters are listed in the Filter List drop-down menu.

To modify the properties of the existing filter, click the More (···) button in the filter area and then click the **Edit Filter** command.

To delete an existing saved filter, click the More (···) button in the filter area and then click the **Delete Filter** command.

Advanced Filter Editor

By using the **Advanced Filter** dialog box, you can visually and intuitively specify complex filtering criteria—that is, one or more simple filtering criteria grouped and joined by logical operators. To open the dialog box, do either of the following:

- Click the More (···) button in the filter area and then click the **Open Advanced Filter** command.
- Click the **Add Quick Filter** button and select **Advanced** in the dialog box that opens.

The following screenshot shows the **Advanced Filter** dialog box.

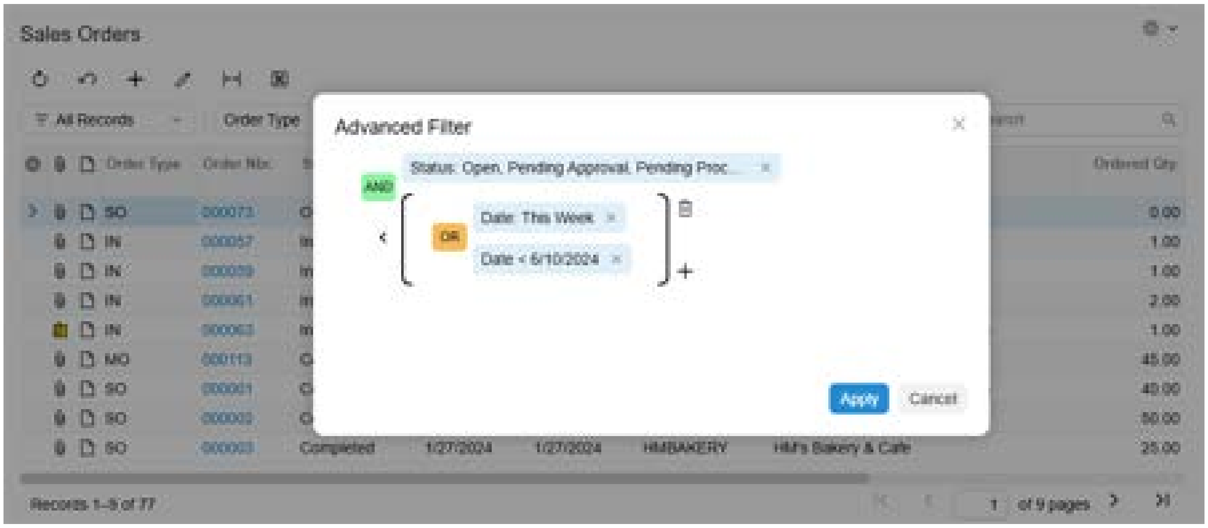


Figure: Advanced Filter editor

In the editor, you can do the following:

- To define filter criteria, click the name of the desired data field, specify the conditions and the desired values (if needed), and then click **Apply**. The list of available conditions and values varies depending on the data field type.
- To clear filter criteria, click the name of the desired data field and then click **Clear Filter**.
- To delete filter criteria, either click the icon or click the name of the desired data field and then click **Remove Filter**.
- To add another data field, click the plus icon next to the existing data field and select the name of the needed data field in the dialog box that opens.
- To change the logical operator, click the operator name. Possible operators are *AND* and *OR*.
- To group multiple filter criteria, hover over the logical operator and click the icon. Groups define the order of logical operations. Grouped criteria are denoted with parentheses.
- To cancel the grouping, hover over the parentheses and click the icon.
- To delete a group, hover over the parentheses and click the icon.
- To apply the current filter to the table and close the editor, click **Apply**.
- To close the editor without applying the filter, click **Cancel**.

Once the advanced filter has been applied to a table, it is displayed as a row in the filtering area, as shown in the following screenshot.

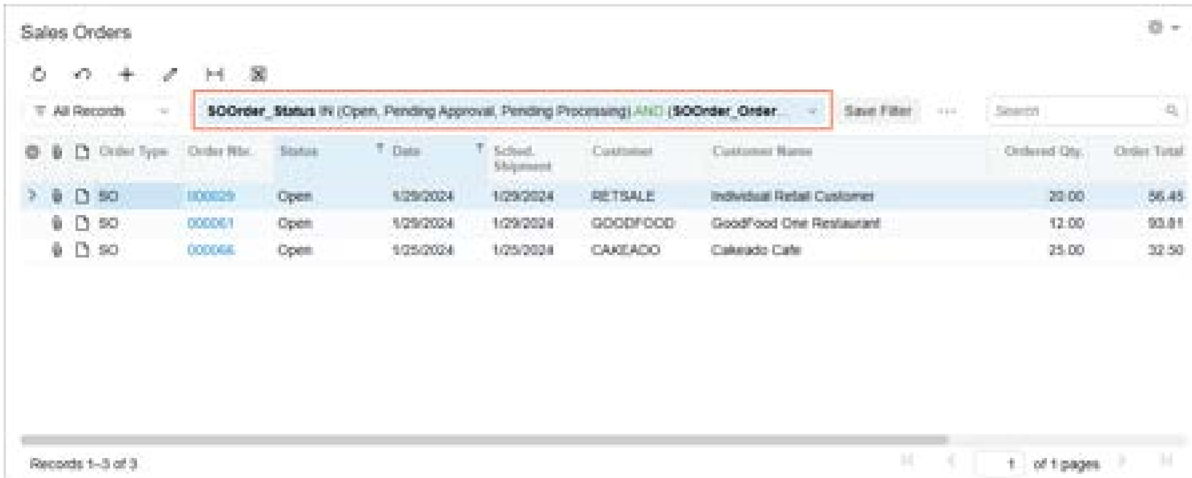


Figure: Advanced filter applied to a table

Modern UI: User Personalization

By using functionality of the Modern UI, you can easily customize the layout of forms. This topic describes various ways that you can adjust the user interface for your own user accounts. In the Modern UI, personal layouts of forms are retained between sessions and apply only to your user account.

Customizing Tab Controls

Once a form has been switched to the Modern UI, you can change the order of tabs and hide or display individual tabs. Changes to the tab controls will be applied to the personal layout of the form.

To reorder a tab, click and hold the tab name and then drag it to the desired position (as shown in the screenshot below).

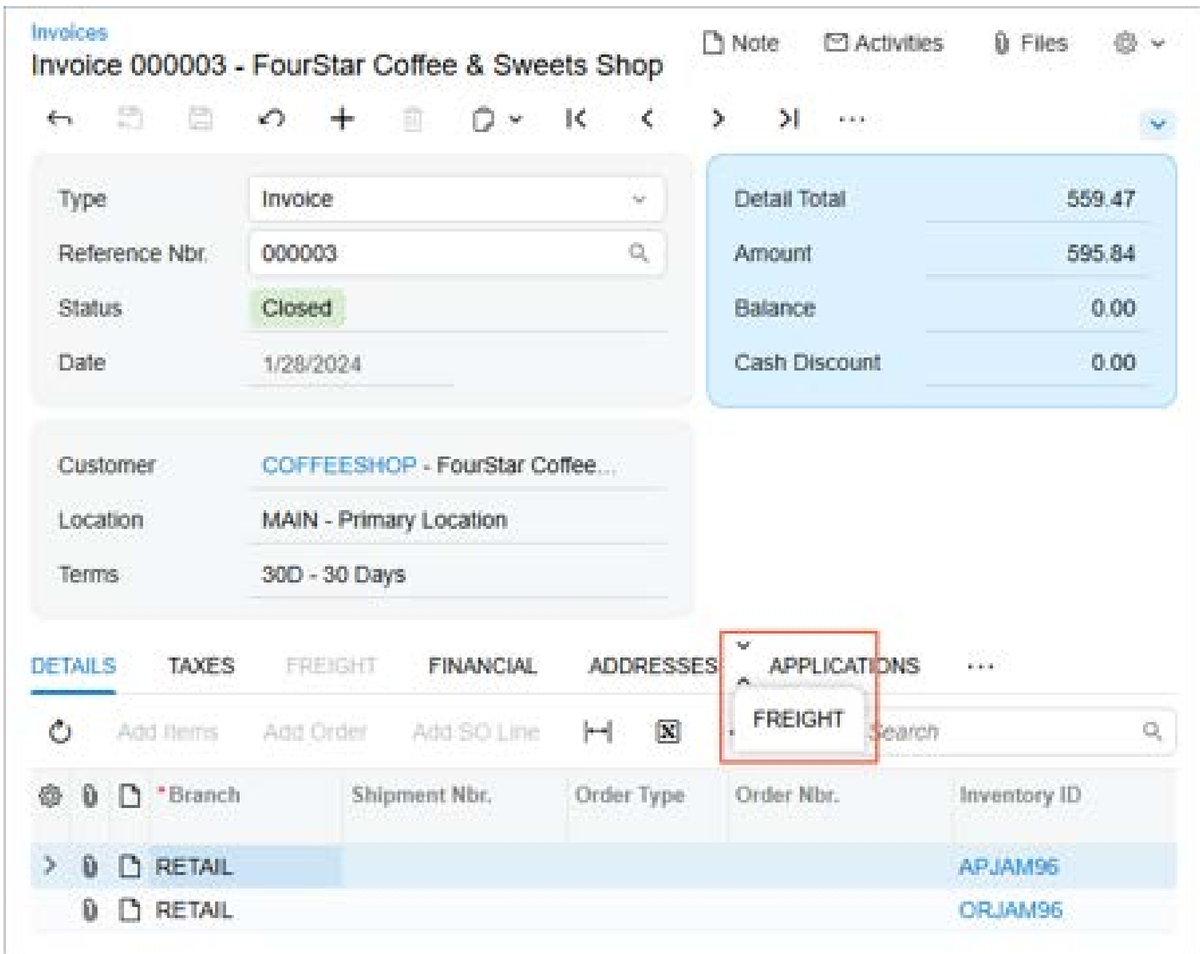


Figure: Reordering tabs

To hide a tab, click and hold the tab name, drag it first to the More button, and then drag it to the **Hidden Tabs** section (as shown in the screenshot below).

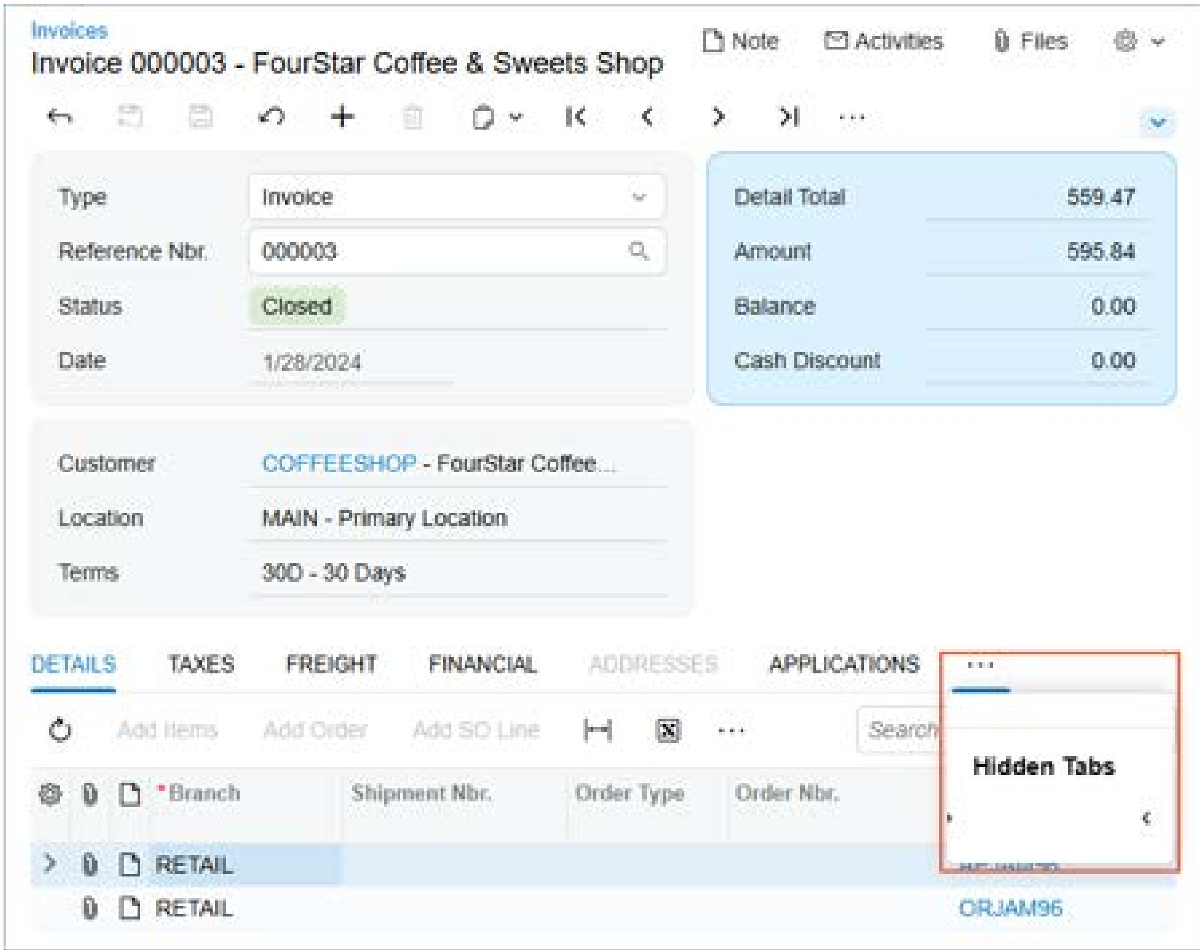


Figure: Hiding tabs

To display a hidden tab, click the More button and then drag the tab name from the **Hidden Tabs** section to the needed position.

Customizing Table Controls

In Modern UI, you can customize the appearance and content of table controls: add or remove visible columns, reorder columns, and change any column's width. Changes to the table would be applied to the personal layout of the form.

In the Modern UI the Settings button is displayed in the upper-left corner of the table control. By clicking this button, you can open the Column Configuration dialog box, as shown in the following screenshot.

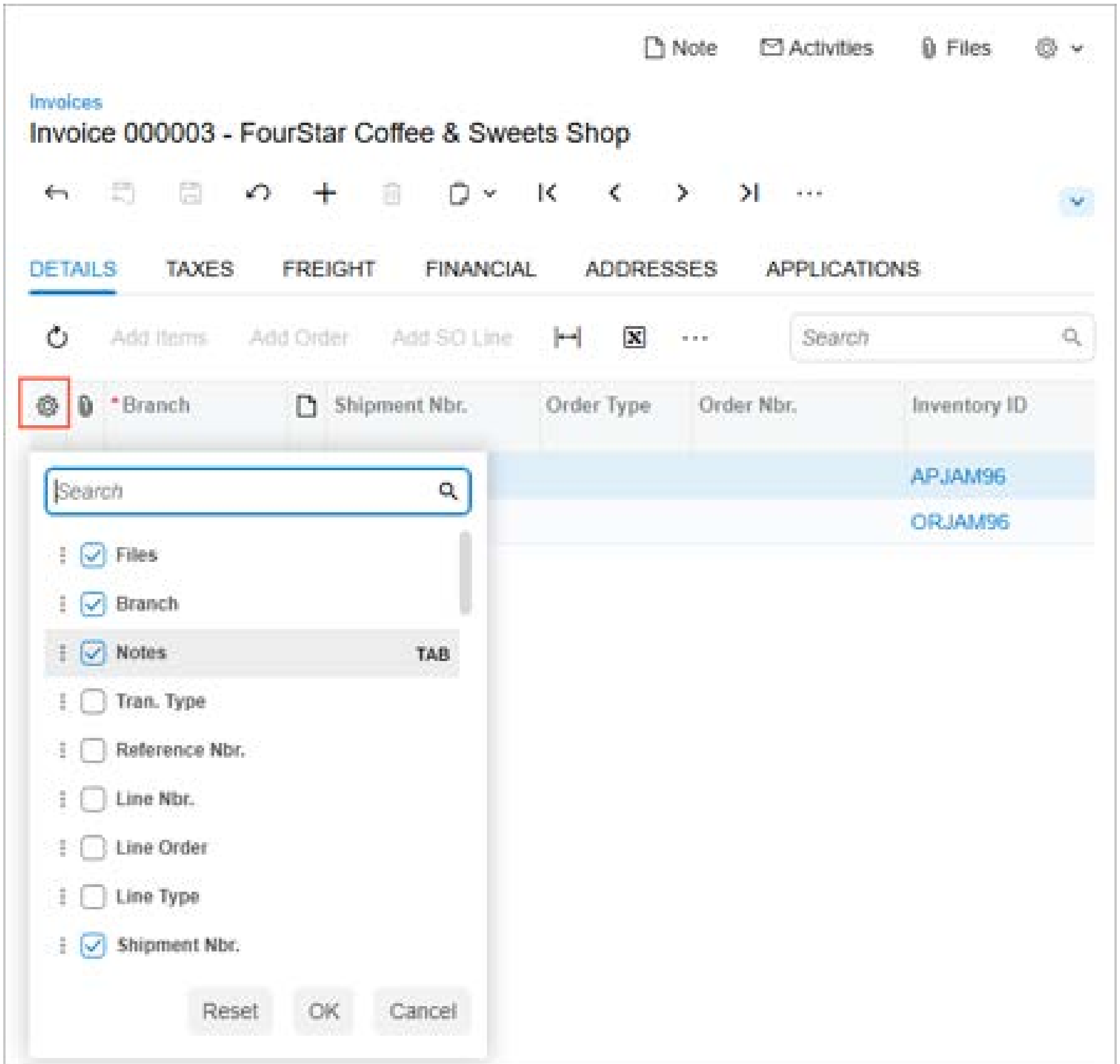


Figure: Column Configuration dialog box

In the Column Configuration dialog box, you can do any of the following:

- To hide or display a column, clear or select the check box next to the column name.
- To modify the order of the columns, drag the column name to the desired position in the list.
- To change whether the column should receive focus when you press Tab, hover over the column name and click **Tab** to change its state (which will cause the word to be crossed out or appear normal).
- To apply the column configuration, click **OK**.
- To cancel the column customization, click **Cancel**.
- To reset the customization and restore the default layout of the table, click **Reset**.

Customizing Fieldsets

You can collapse and expand certain controls to display fewer or more data fields. The collapsed or expanded state of the controls is retained for your user account between sessions.

To expand or collapse a set of data fields, click the arrow icon in the form toolbar, as shown in the screenshots below.

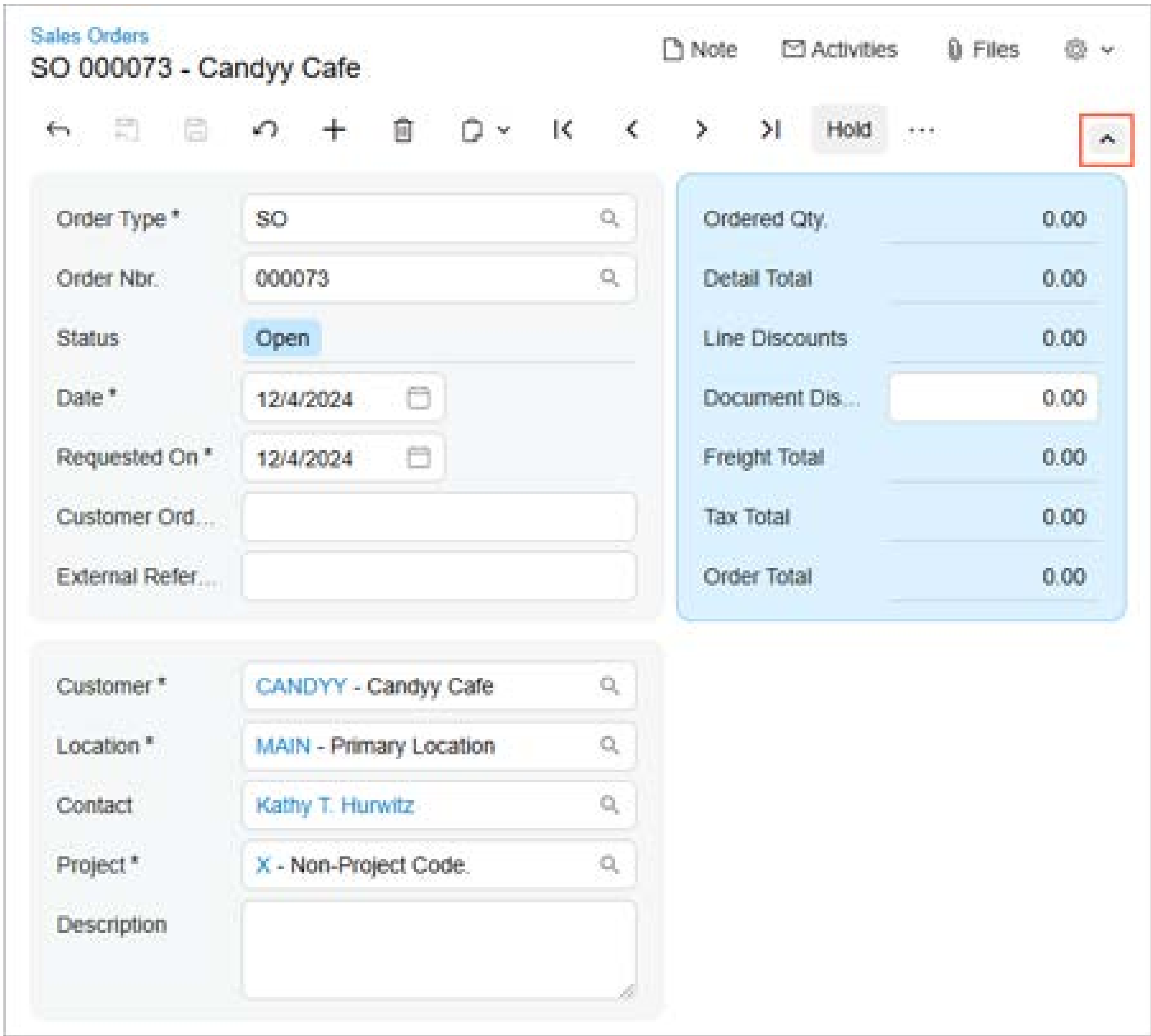


Figure: Expanded fieldset

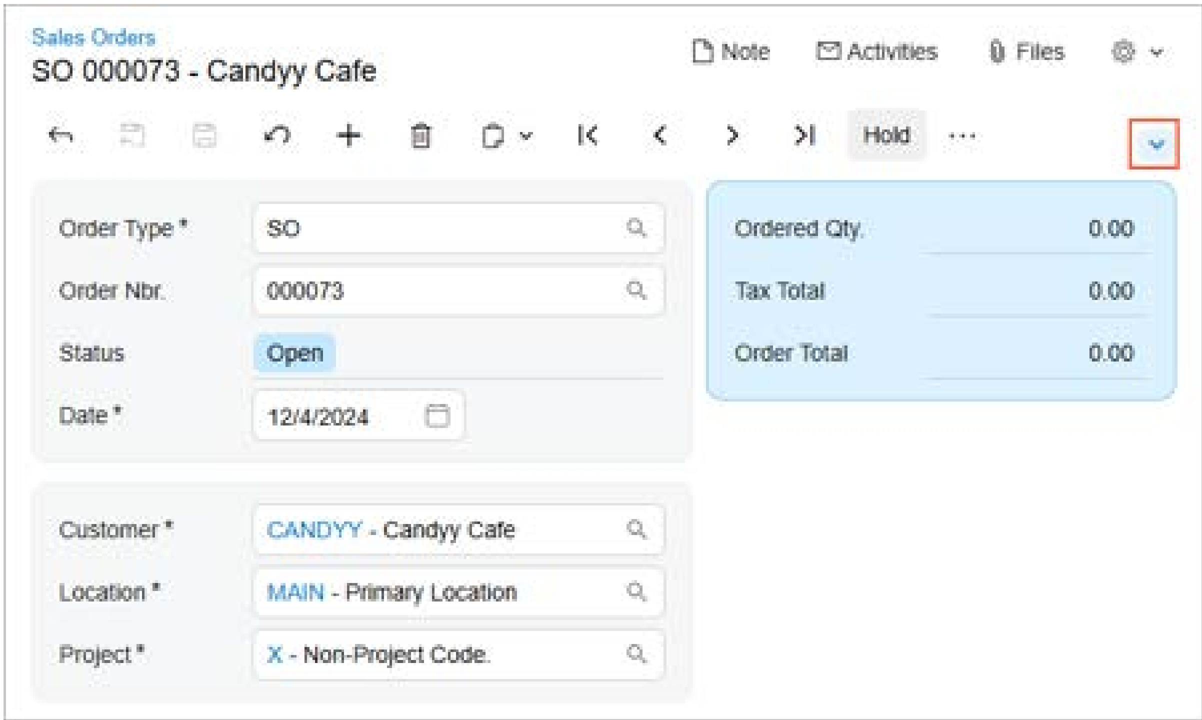


Figure: Collapsed fieldset

Modern UI: Site-Wide Personalization

With Modern UI functionality, if you have the appropriate privileges, you can modify and customize the overall appearance of Acumatica ERP forms, including both standard and custom forms. Additionally, you can set a default form layout for the entire site. You can perform this site-wide personalization only if your user account is assigned both the *Administrator* and *Customizer* roles.

Any site-wide modifications you make will be shared among all system users. When you apply these changes, you can choose to either keep or override any personal configurations that system users have made.

Using Form Configuration Mode

To modify a form's appearance, you click the Settings button on the form title bar and then click **Screen Configuration**. You are now working in Form Configuration mode (as shown in the following screenshot) for the current form; if you navigate to another form, the mode is deactivated, discarding any changes you have made.

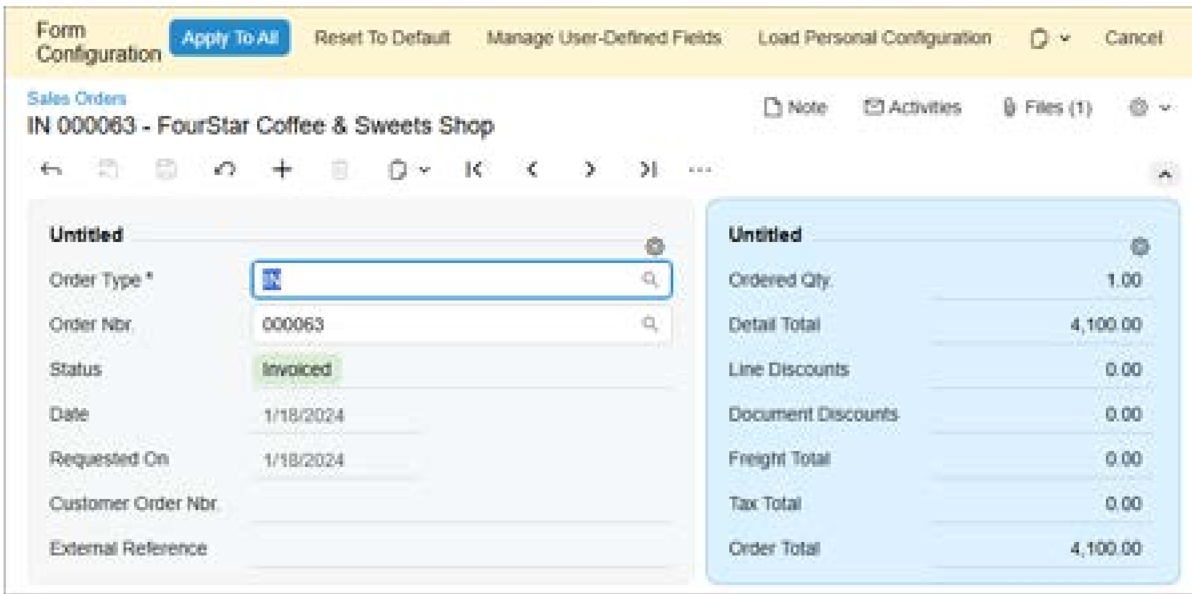


Figure: A form in Form Configuration mode

When Form Configuration mode is active, the system does the following:

- Applies either the default layout of the current form or the layout shared between all users (if one has been configured)
- Displays the Form configuration pane on the top of the form
- Displays the Settings buttons next to each fieldset and tab control

The buttons that appear in the Form Configuration pane are described in the following table.

Button	Description
Apply to All	Applies the changes to the layout shared between all users and deactivates Form Configuration mode. The system prompts you about whether it should replace or retain the personalized layouts of individual users.
Reset to Default	Restores the form to the default layout supplied by Acumatica ERP.

Button	Description
Manage User-Defined Fields	Opens a dialog box where you can manage user-defined fields associated with the current form. See *Modern UI: Managing User-Defined Fields* for details.
Load Personal Configuration	Opens a dialog box that displays other users' customized layouts for the current form and gives you the ability to apply the selected layout to the layout shared between all users.
Export Configuration	Exports the current form’s configuration to an external file.
Import Configuration	Imports the form’s configuration from an external file and applies it to the current form.
Cancel	Discards all changes and deactivates Form Configuration mode.

Customizing Tab Controls

In Form Configuration mode, you can change the order of tabs and hide or display individual tabs. Changes to the tab controls will be applied to form layout shared among all users.

To reorder a tab, click and hold the tab name and then drag it to the desired position (as shown in the screenshot below).

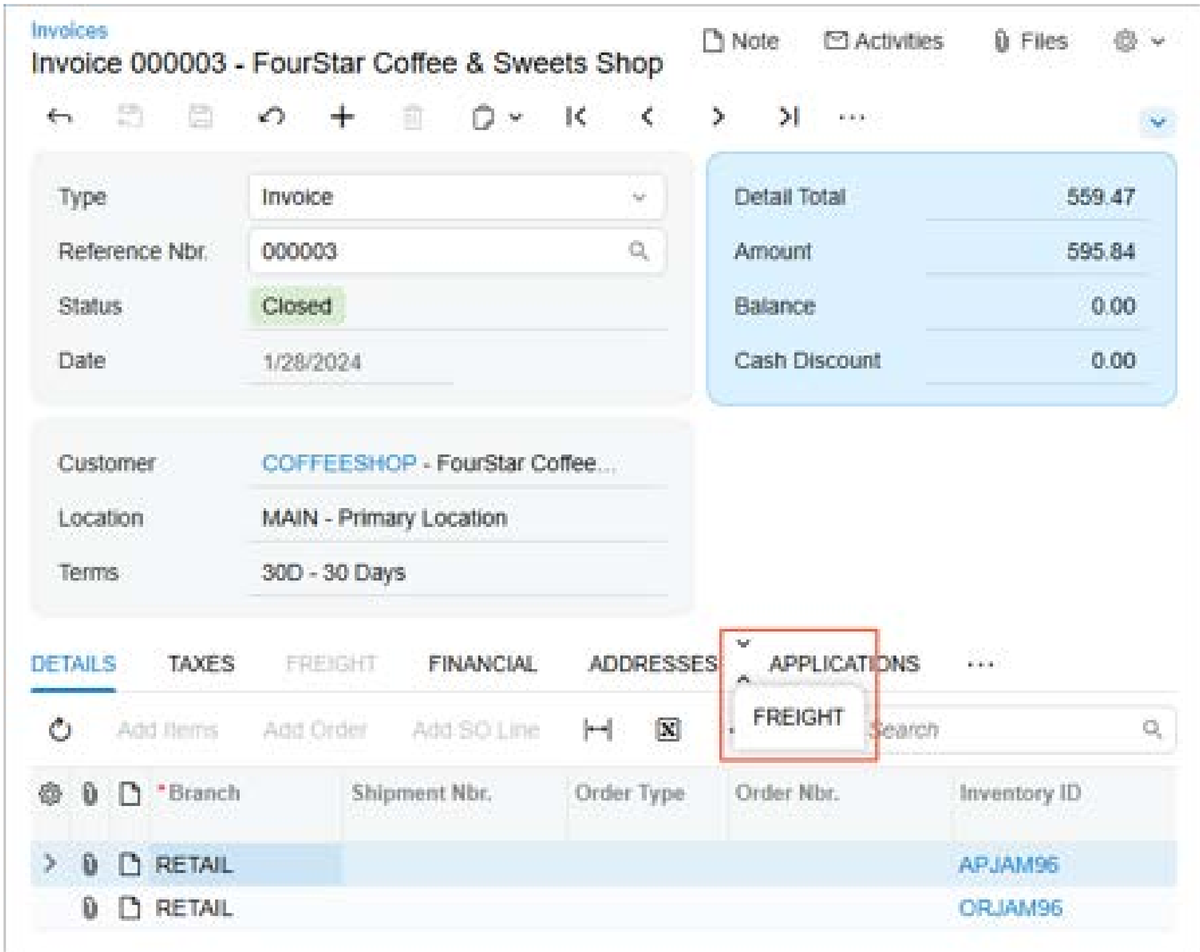


Figure: Reordering tabs

To hide a tab, click and hold the tab name, drag it first to the More button, and then drag it to the **Hidden Tabs** section (as shown in the screenshot below).

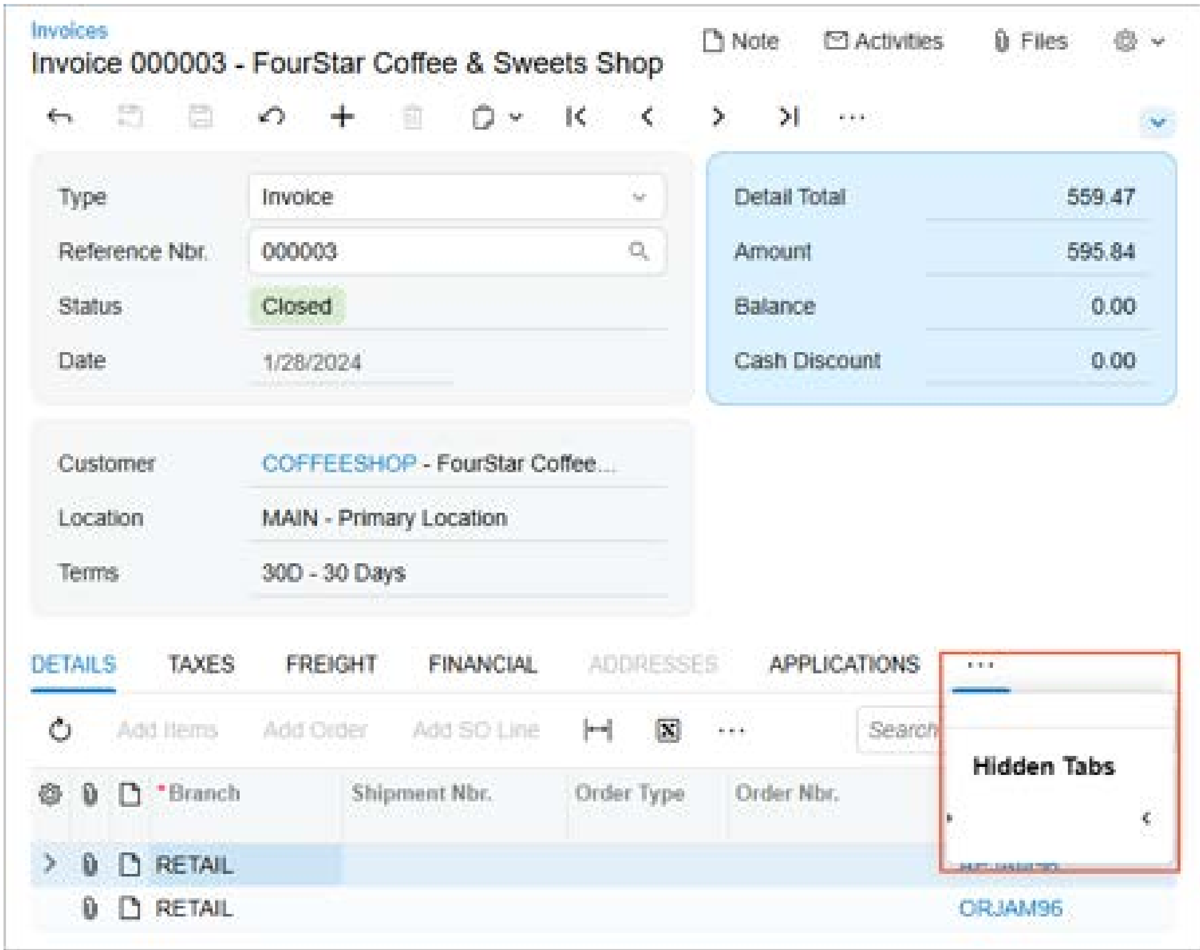


Figure: Hiding tabs

To display a hidden tab, click the More button and then drag the tab name from the **Hidden Tabs** section to the needed position.

Additionally, in Form Configuration mode, Settings buttons appear next to each tab control. If you click one of these buttons, the **Tab Configuration** dialog box opens for the tab, as shown in the screenshot below.

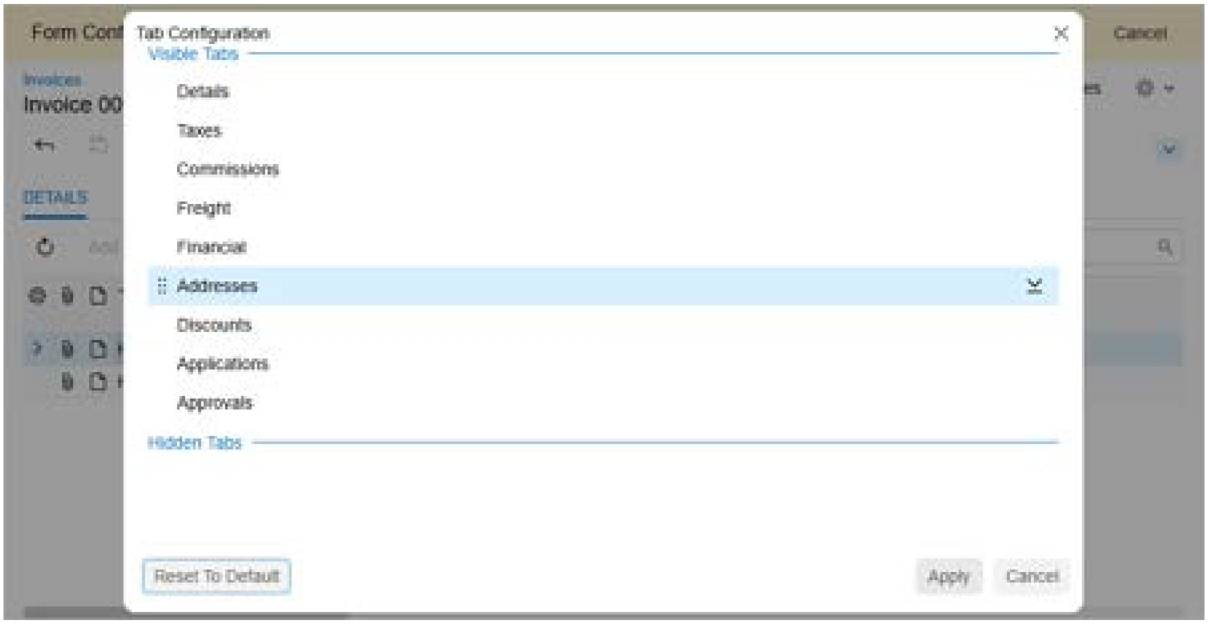


Figure: Tab Configuration dialog box

In the **Tab Configuration** dialog box, you can do the following:

- To hide a tab, drag it from the **Visible Tabs** section to the **Hidden Tabs** section, or click the arrow button next to the tab name.
- To display a tab, drag it from the **Hidden Tabs** section back to the **Visible Tabs** section, or click the arrow button next to the tab name.
- To modify the order of the tabs, drag the tab name to the desired position in the list.
- To apply the tab configuration, click **Apply**.
- To cancel the customization of the tab, click **Cancel**.
- To reset the customization and restore the default layout of the tab control, press **Reset to Default**.

Customizing Tables

In Form Configuration mode, you can add or remove visible columns, reorder columns, and change a column's width. Any changes you make to the table will be applied to the layout that all users share.

In the Modern UI the Settings button is displayed in the upper-left corner of the table control. By clicking this button, you can open the Column Configuration dialog box, as shown in the following screenshot.

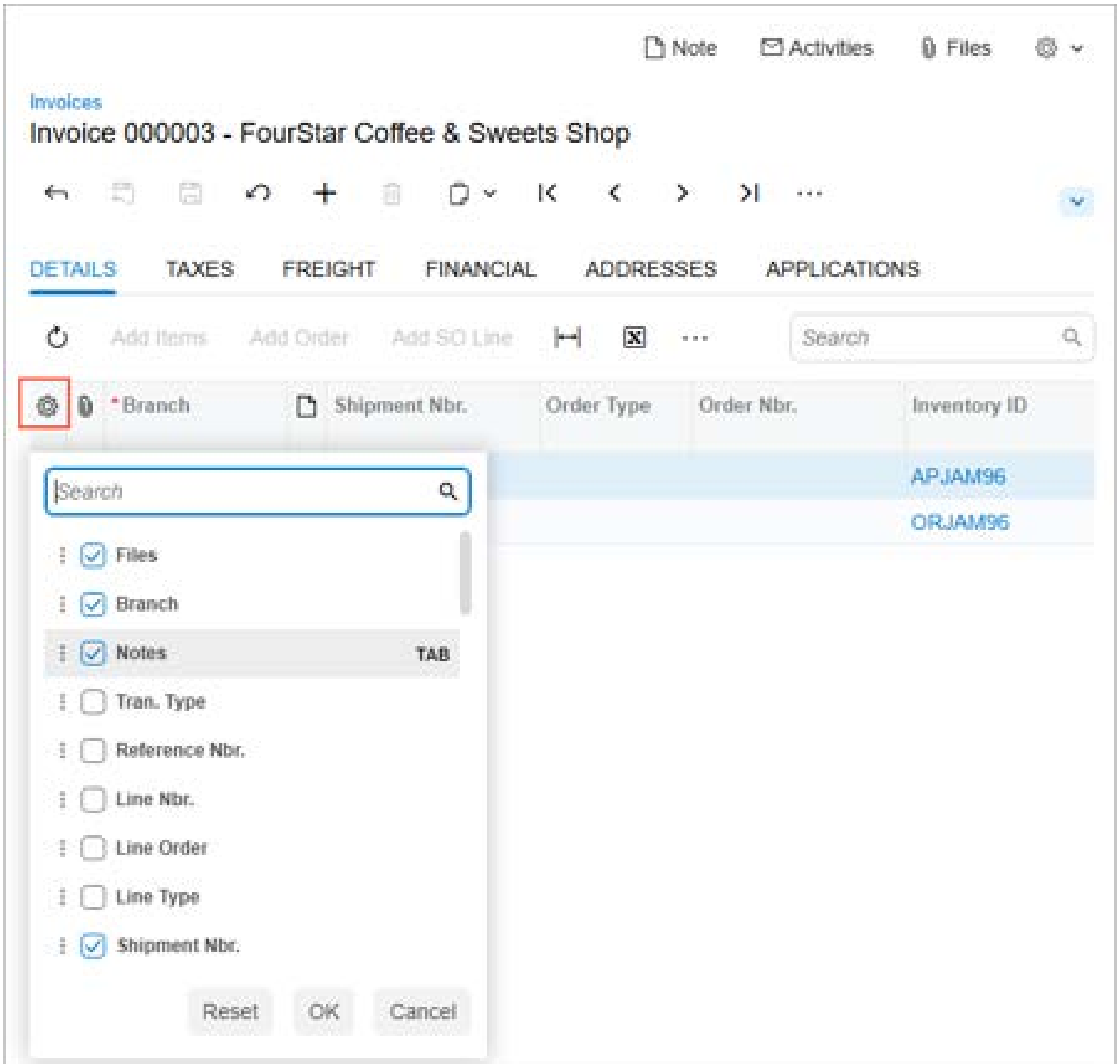


Figure: Column Configuration dialog box

In the Column Configuration dialog box, you can do any of the following:

- To hide or display a column, clear or select the check box next to the column name.
- To modify the order of the columns, drag the column name to the desired position in the list.
- To change whether the column should receive focus when you press Tab, hover over the column name and click **Tab** to change its state (which will cause the word to be crossed out or appear normal).
- To apply the column configuration, click **OK**.
- To cancel the column customization, click **Cancel**.
- To reset the customization and restore the default layout of the table, click **Reset**.

Customizing Fieldsets

In Form Configuration mode, you can expand and collapse certain controls to display fewer or more data fields. The collapsed or expanded state of the controls would be applied to form layout shared between all users.

To expand or collapse a set of data fields, click the arrow icon in the form toolbar, as shown in the screenshots below.

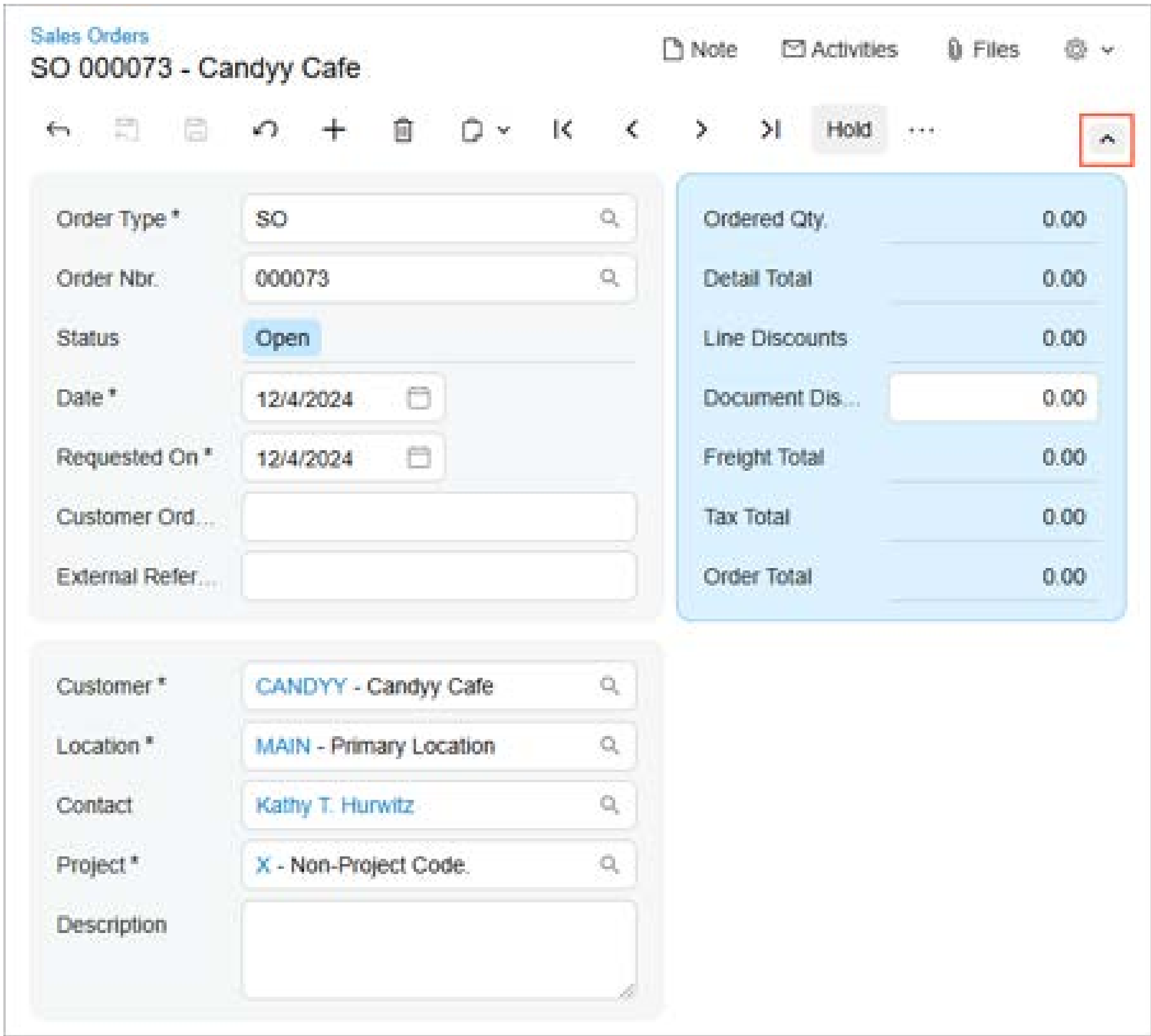


Figure: Expanded fieldset

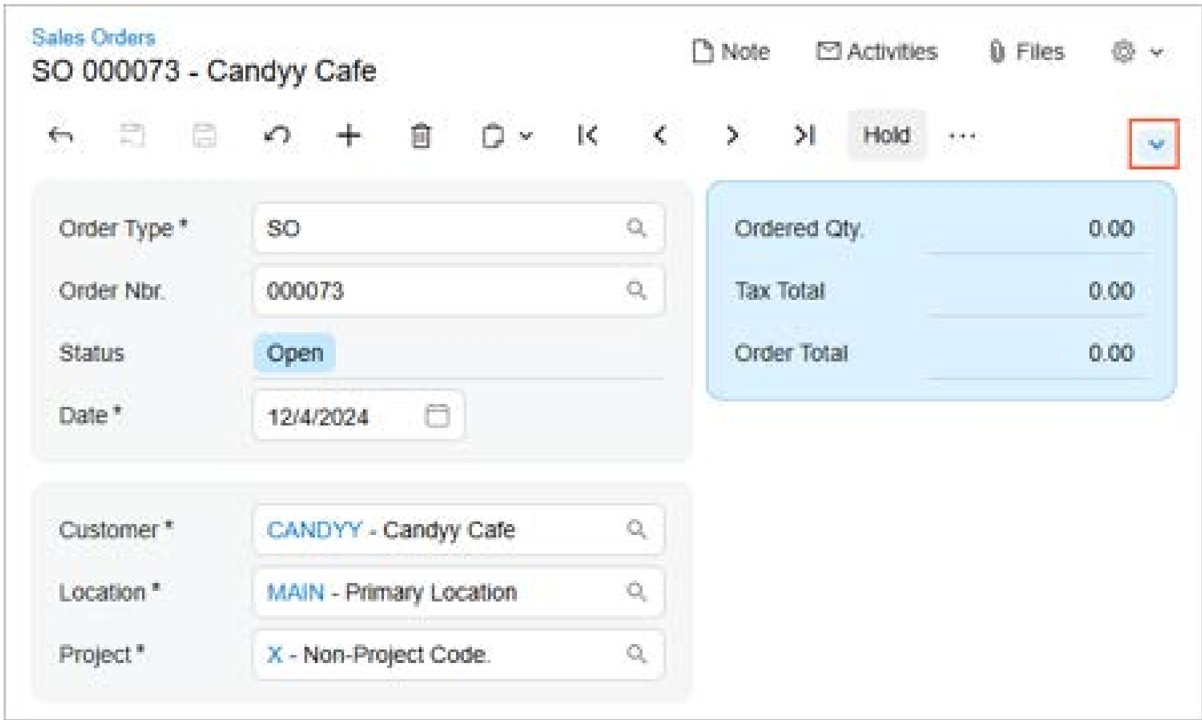


Figure: Collapsed fieldset

Additionally, when Form Configuration mode is active, the Settings buttons appear in the upper-right corner of the fieldsets. If you click one of these buttons, the **Section Configuration** dialog box opens, as shown in the screenshot below.

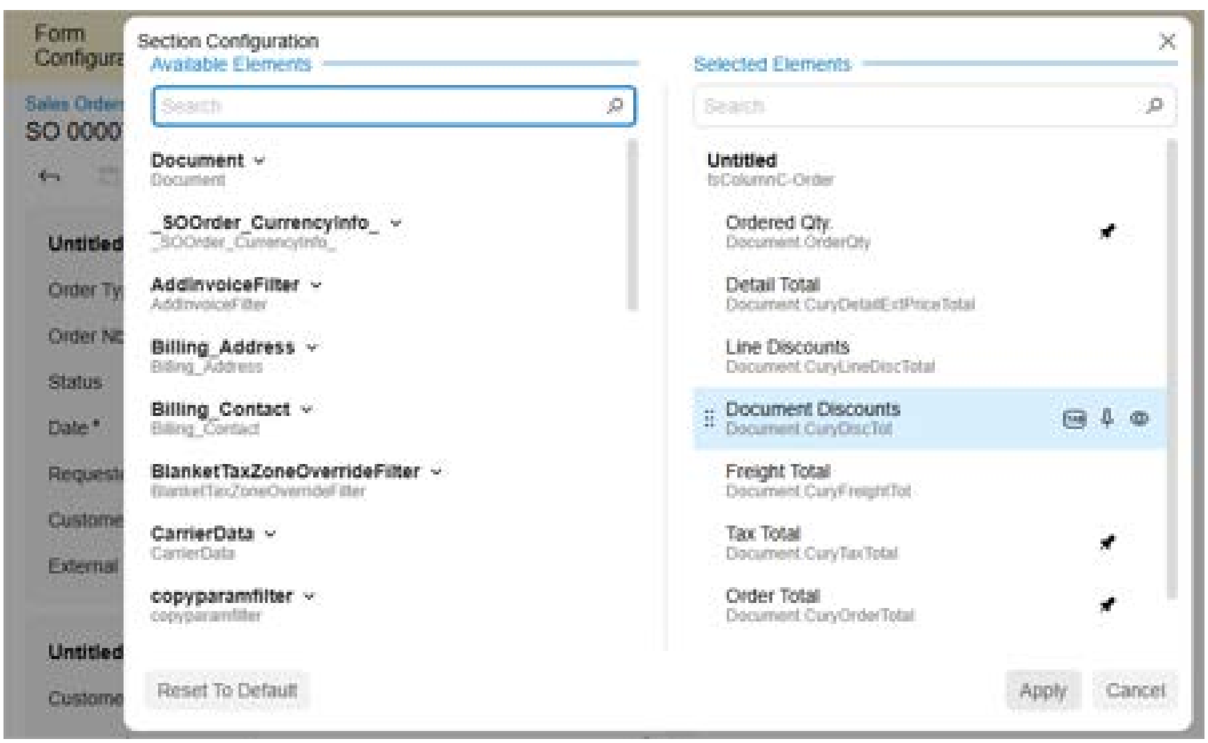


Figure: Section Configuration dialog box

In the **Section Configuration** dialog box, you can perform the following actions:

- To rename the fieldset, hover over the group title in the **Selected Elements** pane, click the **Edit** button, and specify the new name of the fieldset.
- To add a UI element to the fieldset, locate the desired element in the **Available Elements** pane and drag it to the **Selected Elements** pane.
- To remove a UI element from the fieldset, hover over the element name in the **Selected Elements** pane and click the **Delete** button.

  Default UI elements cannot be removed; only personalized elements can be.

- To change whether the UI element should receive focus when a user presses Tab, hover over the element name in the **Selected Elements** pane and click **Tab** to change its state (which will cause the word to be crossed out or appear normal).
- To change whether the UI element should be displayed when the fieldset is collapsed, hover over the element name in the **Selected Elements** pane and click **Pin**.
- To hide the UI element, hover over the element name in the **Selected Elements** pane and click the **Visible** button. If all elements in a fieldset are hidden, the entire fieldset becomes hidden.
- To modify the order of UI elements, drag the element name to the desired position in the **Selected Elements** pane.
- To apply the fieldset configuration, click **Apply**.
- To cancel fieldset customization, click **Cancel**.
- To reset the customization and restore the default layout, click **Reset to Default**.

Modern UI: Managing User-Defined Fields

When personalizing data entry forms across the site in the Modern UI, you can conveniently add user-defined fields directly to these forms. For more information about user-defined fields, see the *Managing Attributes and User-Defined Fields* chapter.

You can perform site-wide personalization only if your user account is assigned both the *Administrator* and *Customizer* roles.

Managing User-Defined Fields of a Form

Adding each user-defined field to a form in the Modern UI involves the following steps:

1. Selecting or creating the attribute that will be used as the user-defined field. User-defined fields are based on predefined and site-specific attributes that have been defined in the system.
2. Associating the selected field with the desired form.
3. Adding the field as a UI element to the desired section of the form.

Each of these steps is described in the sections below.

Choosing Attributes

Before adding any user-defined fields to a form, you should be sure the corresponding attributes have been defined on the *Attributes* (CS205000) form. These attributes can be either ones already defined in the system or new ones that you create. For instructions on how to create attributes, see *To Create an Attribute*.

Associating the Field with the Form

To associate a user-defined field with the form where it will be shown, you open this form and use the **Manage User-Defined Fields** dialog box (shown in the screenshot below). To open the dialog box, you first turn on Form Configuration mode by clicking the Settings button on the form title bar and then clicking **Screen Configuration**. Then you click the **Manage User-Defined Fields** button at the top of the form.

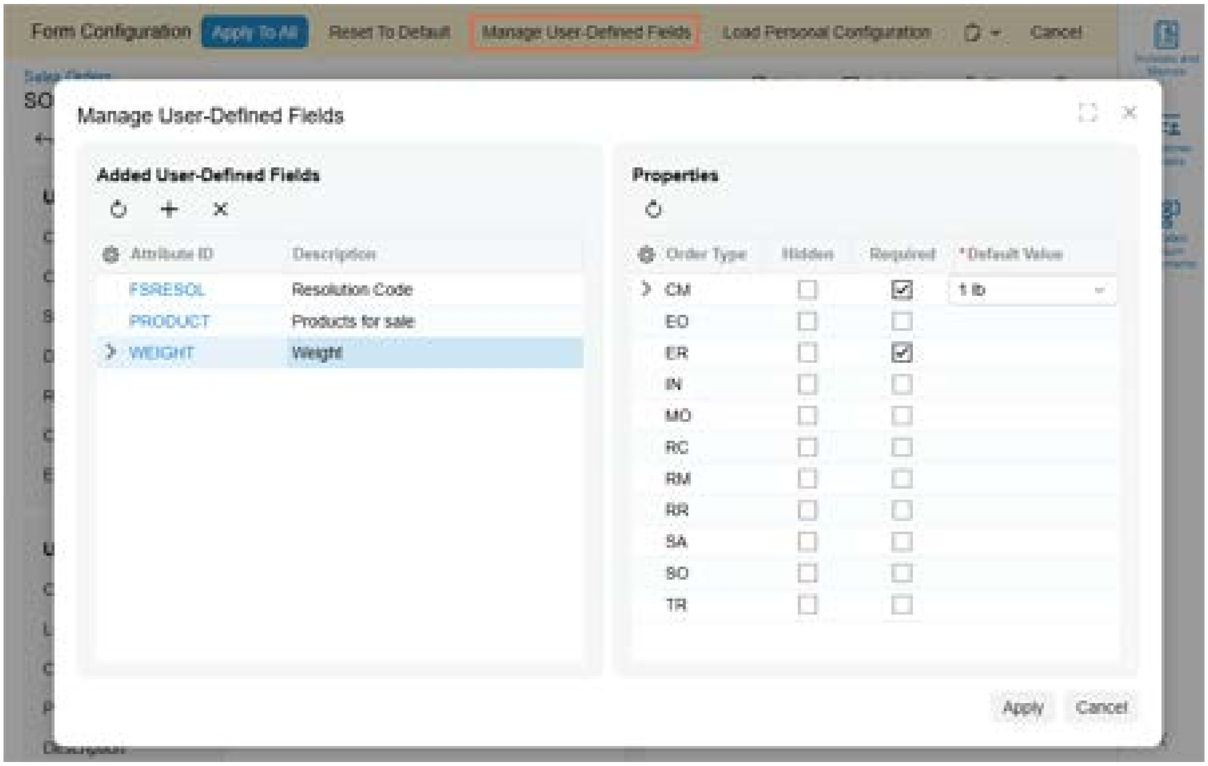


Figure: The Manage User-Defined Fields dialog box

In the **Manage User-Defined Fields** dialog box, you can perform the following actions:

- To associate a user-defined field with the form, click the **Add Row** button in the **Added User-Defined Fields** pane and specify the ID of the attribute in the **Attribute ID** column.
- To remove a user-defined field from a form, first click the row in the **Added User-Defined Fields** pane and then click the **Delete Row** button on the table toolbar.
- To refresh the list of user-defined fields, click the **Refresh** button on the table toolbar of the **Added User-Defined Fields** pane.
- To refresh the list of properties, click the **Refresh** button on the table toolbar of the **Properties** pane.
- To denote that a field should not be displayed on the form, select the desired field and record type (if the form supports multiple types of records) and select the **Hidden** check box.
- To mark a field as mandatory, select the desired field and record type (if the form supports multiple types of records) and select the **Required** check box.
- To specify the field's default value, select the desired field and record type (if the form supports multiple types of records) and specify the value in the **Default Value** column.
- To close the dialog box and apply the changes to the user-defined fields, click **Apply** in the lower right corner.
- To close the dialog box without saving any changes, click **Cancel** in the lower right corner.

Adding a Field to the Form

Once user-defined fields are associated with the form, you can add them to any fieldset of the form by using the **Section Configuration** dialog box (shown in the screenshot below). To open the dialog box, you first turn on Form Configuration mode by clicking the Settings button on the form title bar and then clicking **Screen Configuration**. Then you click the Settings button in the top-right corner of the target fieldset.

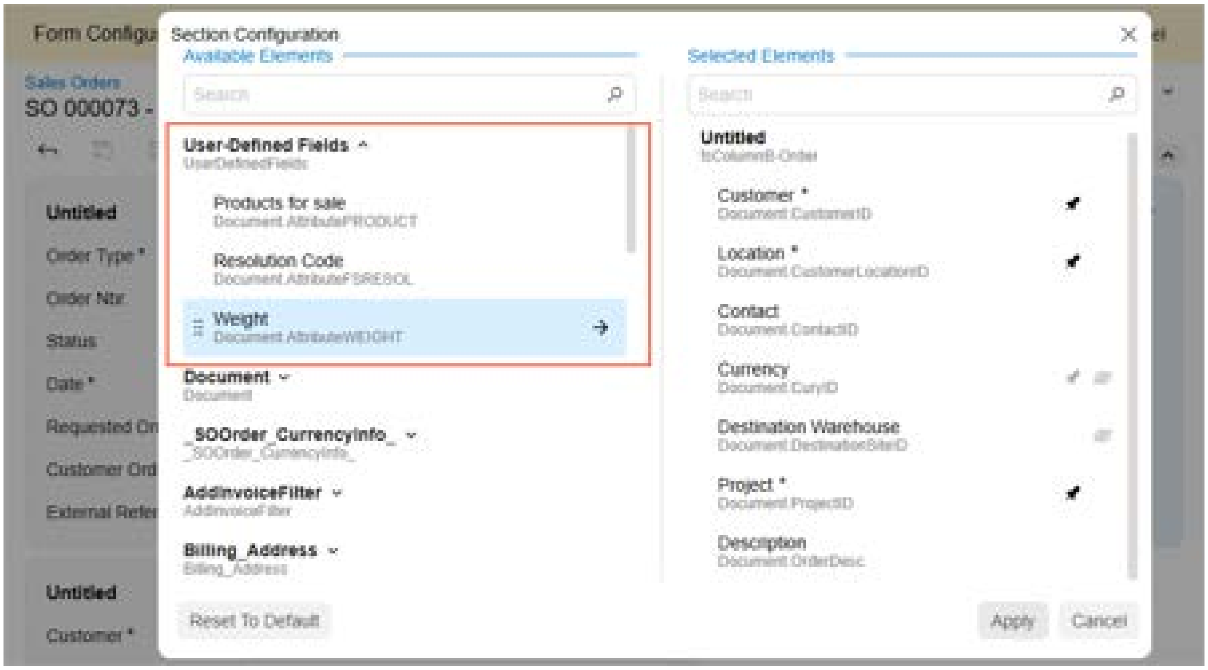


Figure: User-defined fields in the Section Configuration dialog box

User-defined fields associated with the form are listed under the **User-Defined Fields** node of the **Available Elements** pane.

To add a field to the fieldset, locate the field in the **Available Elements** pane and drag it to the **Selected Elements** pane.

Once you have added all the needed user-defined fields, click **Apply** to close the **Section Configuration** dialog box. Then click **Apply to All** in the Form Configuration pane to apply the layout changes to the form and turn off Form Configuration mode.

In this way, you can customize any form to display user-defined fields.

Modern UI Development: General Information

The Modern UI is a .NET-compatible product that provides updated UI capabilities without ASPX pages. On the server side, the Modern UI is represented by web services. On the client side, it is represented by a template-based single-page application (SPA) framework based on *Aurelia*.

The application code is written in TypeScript. The framework transcribes the TypeScript code into JavaScript code, which is then executed on the web browser. This approach simplifies code support. Developers use HTML and CSS to design the layout of a form.

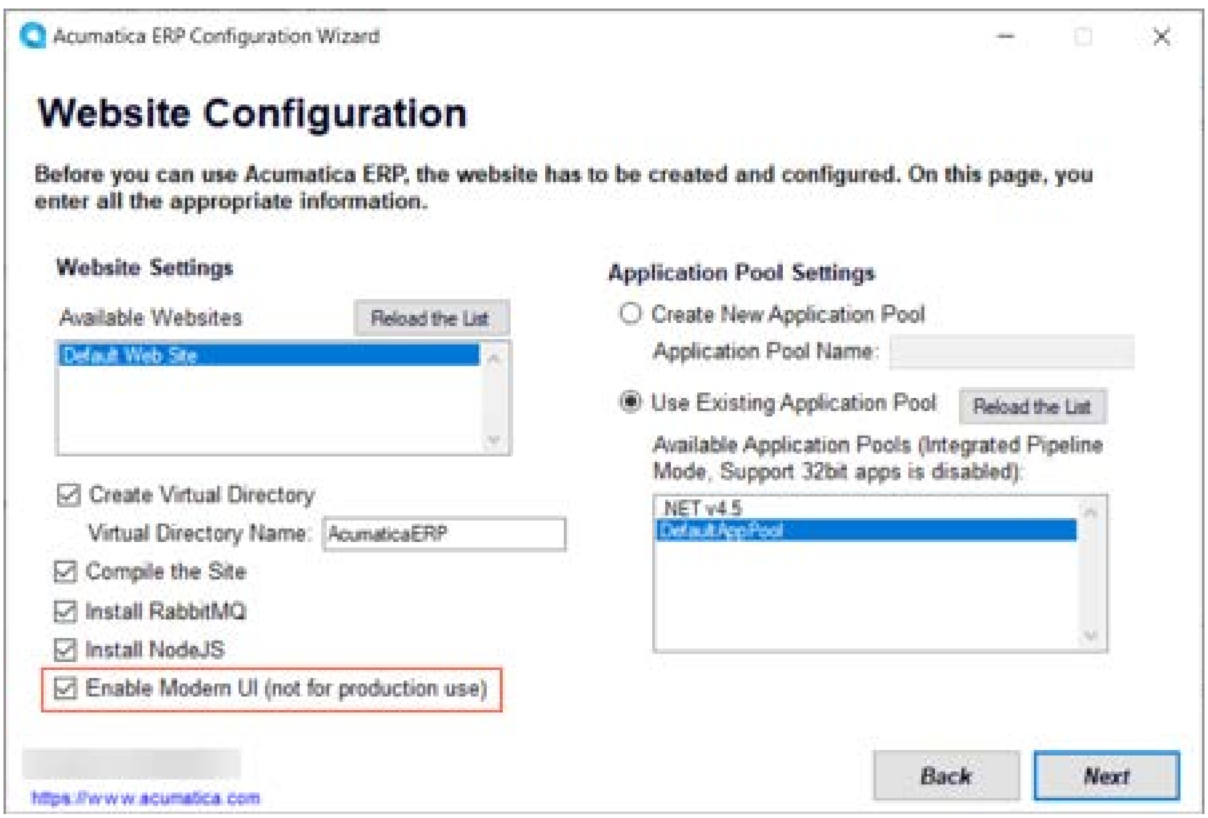
Applicable Scenarios

You will work with the Modern UI in the following cases:

- You need to make it possible to use the Modern UI for your instance.
- You need to convert any number of forms of your Acumatica ERP instance to the Modern UI.
- You need to create a new form that is based on the Modern UI.
- You need to be able to switch between the Modern UI and the Classic UI of a form.

Enabling of the Modern UI in the Acumatica ERP Configuration Wizard

While deploying an instance by using the Acumatica ERP Configuration wizard, you can give users the ability to switch to the Modern UI. To do this, you select the **Enable Modern UI** check box on the Website Configuration page of the wizard, as shown in the following screenshot.



Make sure that you have the **Install NodeJS** check box selected so that the Acumatica ERP Configuration wizard installs the needed version of Node.js for compilation of the customization code of the Modern UI. If you want to use the version of Node.js that has already been installed in your system, you can clear the **Install NodeJS** check box and add the following key to the `appSettings` section of the `Web.config` file of your instance: `<add key="NodeJs:NodeJsPath" value="C:\Program Files\NodeJs"/>`. In this key, `value` specifies the path to the location where Node.js has been installed.

When you select the **Enable Modern UI** check box, the system adds the `<add key="EnableSiteMapSwitchUI" value="True" />` key to the `Web.config` file of your instance. If you want to disable the switching to the Modern UI for your instance, you can remove this key or change its value to *False*. However, if some forms were already switched to the Modern UI before you removed this key or changed its value, these forms will still stay in the Modern UI.

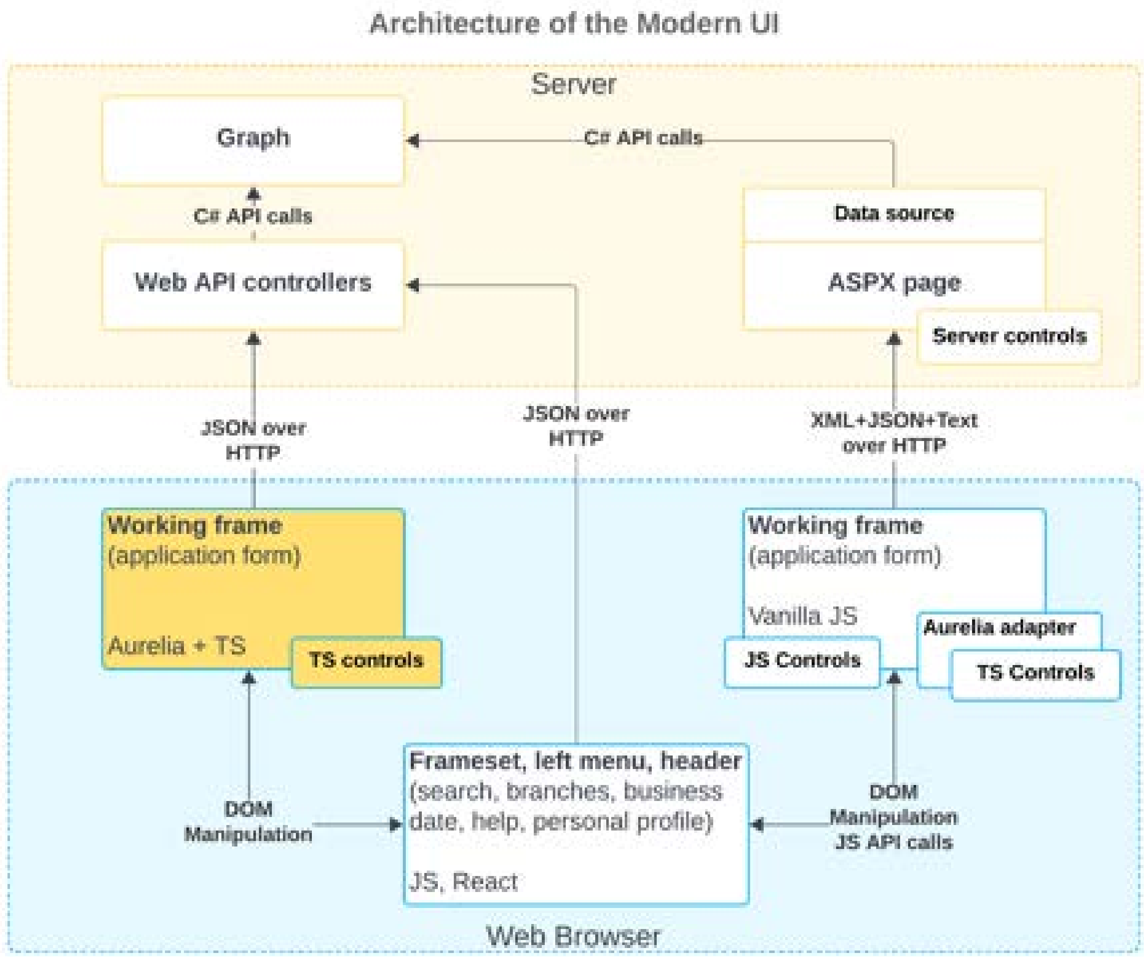
You should select the **Enable Modern UI** check box only when you are deploying an instance for testing purposes. To enable the Modern UI in a production environment, please contact your Acumatica partner.

Architecture of the Modern UI

The architecture of the Modern UI is based on the *Model-View-ViewModel (MVVM) pattern*, with the parts of the architecture represented as follows:

- A view is represented by an HTML template.
- A view model is represented by the code written in TypeScript.
- A model is represented by a graph on the server that exchanges data from the client side.

The following diagram shows the architecture of the Modern UI and the interaction between its components.



Currently, the Modern UI is embedded in the infrastructure of the Classic UI. The Modern UI is represented by a new frame that enables TypeScript controls in the Classic UI infrastructure. Also, the Modern UI includes web API controllers that are added to the controllers of the Classic UI. Some parts of the Modern UI have been connected to the Classic UI architecture via an Aurelia adapter, which adapts TypeScript's controllers to work in the Classic UI architecture. The forms that are fully converted to the Modern UI (highlighted in yellow in the preceding diagram) work directly with web API controllers.

JSON serves as the protocol between the client side and the server side. As a result, all requests can be seen in a unified format and used for debugging.

Capabilities of the Modern UI

The Modern UI provides a variety of new capabilities for both developers and users. For developers, the Modern UI provides the following capabilities in comparison to the Classic UI:

- The template (HTML and CSS) and presentation logic layers (TypeScript) are fully customizable.
- The client-side model can be programmed by using the event-driven model, which is similar to the server-side model.
- The graph code generally does not require any modifications. The Modern UI and the Classic UI share the same graph.
- The developers can always switch between the Modern UI and the Classic UI.

Modern UI Development: Switching of a Form Between the Modern UI and the Classic UI

Acumatica ERP provides a number of ways that you can use to switch an Acumatica ERP form that is using the Modern UI to the Classic UI or vice versa.

For tenants that an administrator has defined as test tenants by clicking **Change to Test Tenant** on the More menu of the *Tenants* (SM203520) form, switching forms between the Modern UI and the Classic UI is available by default. You can directly use any of the methods described in the following sections to switch the UI of a form.

For tenants that are not defined as test tenants, before you use any of the methods described in the following sections, you may need to make a change to the `Web.config` file of your Acumatica ERP instance. In the `appSettings` section, you should add the `<add key="EnableSiteMapSwitchUI" value="True" />` key (if it has not already been added).

If you have selected the **Enable Modern UI** check box while deploying your instance by using the Acumatica ERP Configuration wizard, the system has automatically added the `<add key="EnableSiteMapSwitchUI" value="True" />` key to the `Web.config` file of your instance.

> If you switch a form's UI by using the methods described below, the form's UI will be switched for all users. Thus, this capability is not provided to all users. Only users with the *Edit* level of access rights to the *Site Map* (SM200520) form can switch the UI of a form.

Using a Menu Command to Switch the UI

While viewing a form in the Classic UI, you can click **Tools > Switch to Modern UI** on the form title bar to switch the form to the Modern UI. (See the following screenshot.)

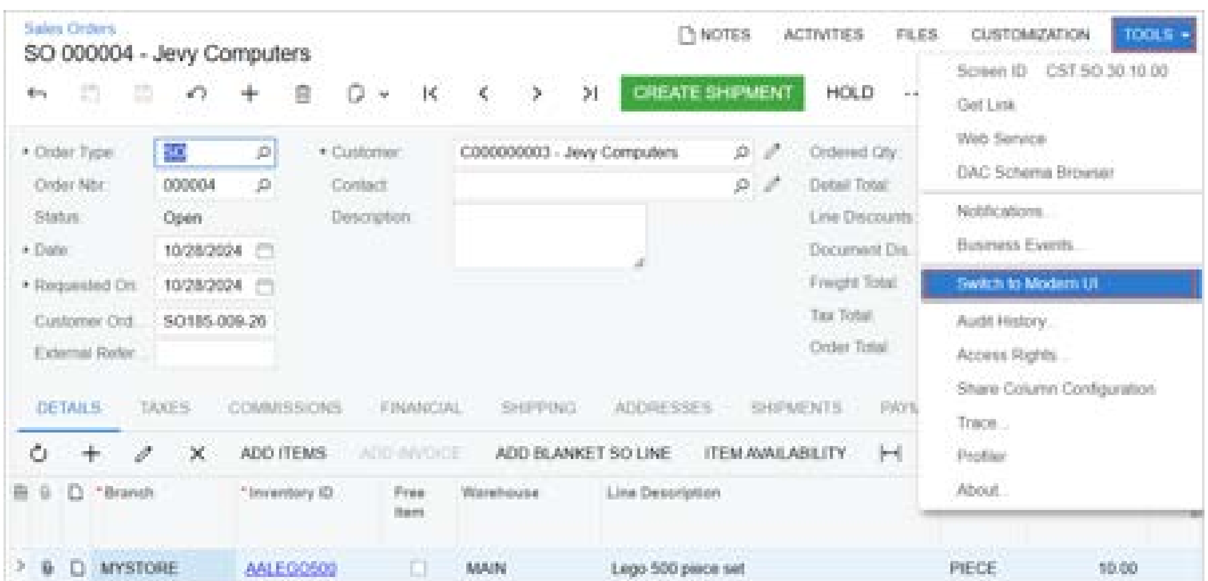


Figure: The Switch to Modern UI command

While viewing a form in the Modern UI, you can click the Settings button on the form title bar and then **Switch to Classic UI** to switch the form to the Classic UI. (See the following screenshot.)

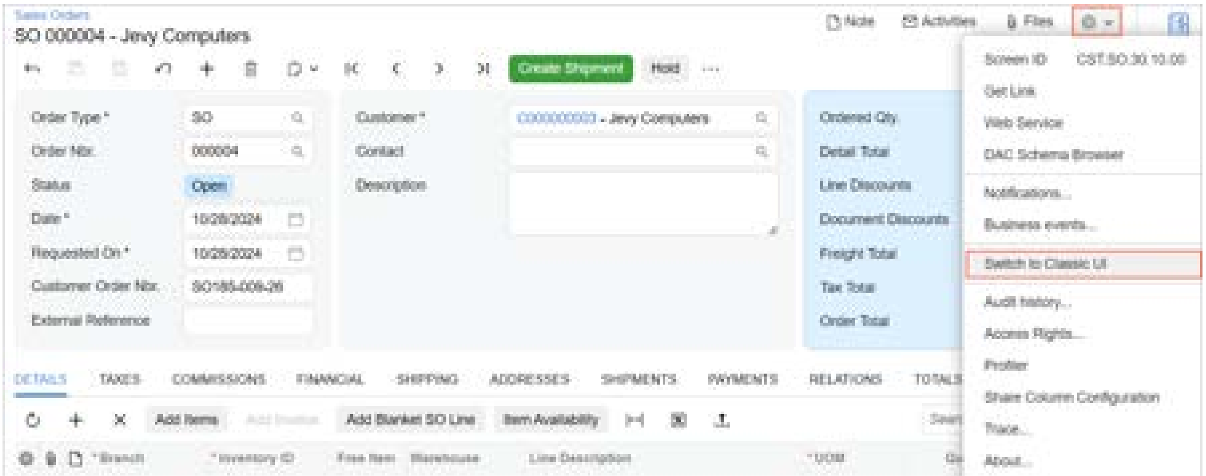


Figure: The Switch to Classic UI command

> ⚠ The **Switch to Modern UI** command is available for only the forms that have been migrated to the Modern UI.

Switching the UI on the Site Map Form

You can use the *Site Map* (SM200520) form to specify the default UI to be displayed for any number of forms.

To cause a form to be displayed in the Modern UI or the Classic UI, you select *Modern* or *Classic* in the **UI** column of the row that corresponds to the form, as shown in the following screenshot.

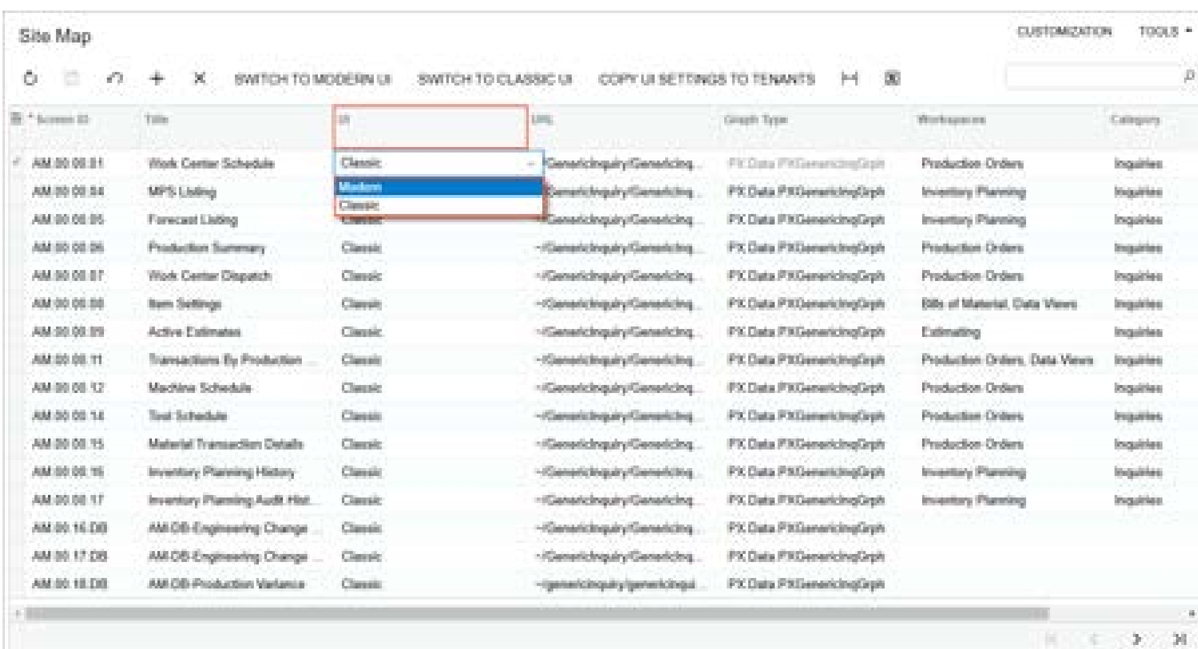


Figure: The options in the UI column

The *Site Map* form also has the **Switch to Modern UI** and the **Switch to Classic UI** buttons on the form toolbar. By using either button, you can switch the UI for all the listed forms with a single click.

Clicking the **Switch to Modern UI** button will not switch the UI for the *Site Map* form itself. To do so, you need to find the row corresponding to this form in the table, select *Modern* in the **UI** column, and save your changes. Then you need to reload the *Site Map* form to see its Modern UI version.

The *Site Map* form also has the **Copy UI Settings to Tenants** button on the form toolbar. By using this button, you can copy the UI settings of all the listed forms to other tenants. When you click this button, the system displays a dialog box where you can select the tenants to which you want to copy the UI settings.

UI Definition in HTML and TypeScript: Built-In Converter

You can use Acumatica's built-in converter, which transforms an Acumatica ERP form from the Classic UI to the Modern UI. The converter parses an ASPX page of the form and generates the source files of the form in the Modern UI. These source files include a TypeScript definition and initialization of views and an HTML layout of the form.

Running the Converter

To use the Modern UI, you need to have the following setting in the `appSettings` section of the `web.config` file of the Acumatica ERP instance: `<add key="EnableSiteMapSwitchUI" value="True" />`. For details on this setting, see *Modern UI Development: General Information*.

This setting also makes it possible for you to convert any form to the Modern UI on the fly by using the converter. To run the converter, you open the needed Acumatica ERP form in the Classic UI and click **Customization > Convert to Modern UI** on the form title bar.

> The **Convert to Modern UI** command is available only if the *Customizer* role is assigned to your user account.

After you execute this command, the following files are generated:

- `views.ts`, which contains declarations of all views that are used in the form
- `[SCREENID].ts`, which contains the initialization of views for the form
- `[SCREENID].html`, which contains the HTML layout of the form

By default, the files are saved in a ZIP archive, which you can download.

> - To obtain the converted version that is most similar to the original, you need to turn on all Acumatica ERP features related to the form before conversion.
> - The converter ignores any JavaScript code in ASPX files or the code in the ASPX.CS files.

Configuring the Converter

You can modify the behavior of the converter by adjusting the `px.core\ui\screenConverter` tag of the `web.config` file of the instance, as shown in the following example.

```
<ui>
    <screenConverter declareViewsInViewModelFile="false" />
</ui>
```

You can use any of the following properties of the `screenConverter` tag:

- `declareViewsInViewModelFile`: If you set this property to *True*, the converter will declare the views in the `<ScreenID>.ts` file instead of creating a separate `views.ts` file.
- `shouldFilesBeDownloaded`: If you set this property to *False*, the files are saved in the folder that is defined by the `screenConverterOutputFolder` property. By default, the `shouldFilesBeDownloaded` property is *True* and the files are saved in a ZIP archive.
- `screenConverterOutputFolder`: You can use this property to specify the output folder for the generated files. The property is used only if the `shouldFilesBeDownloaded` property is *False*. By default, the output folder is `FrontendSources\screen\src\development\<Tenant Name>\screens\[FirstTwoLettersOfSCREENID]\[SCREENID]`.

- `usingOfPXJoinSyntaxEnabled`: If you set this property to *True*, the system uses the approach for joined fields, which uses periods. For details on the approaches to define joined fields, see *UI Definition in HTML and TypeScript: Joined Fields*. By default, this property is *True*.
- `isAutoFormatEnabled`: If you set this property to *True*, the system uses the Prettier tool to automatically format the HTML and the TypeScript code generated by the converter.

Screen Editor for the Modern UI: General Information

The Customization Project Editor gives you the ability to customize the Modern UI forms that you have added to your customization project. These include custom forms that you have developed for the Modern UI from scratch, as well as existing Acumatica ERP forms that you have switched to the Modern UI in your instance.

Applicable Scenarios

You customize a form in the Modern UI by using the Customization Project Editor in the following cases:

- You want to customize the layout of an existing form that you have switched to the Modern UI in your instance and automatically generate the necessary extension file.
- You want to customize the layout of a new form that you have developed for the Modern UI and automatically generate the necessary extension file.

Access to the HTML Editor

The HTML editor is available on the navigation pane of the Customization Project Editor for each form that you have added to your customization project. To access the editor, on the navigation pane, expand the **Screens** node. In the list of forms displayed under the expanded **Screens** node, expand the node that corresponds to the form for which you want to edit the HTML code, and click the **Modern UI** node. The *Modern UI* (AU201080) page opens with the HTML editor and displays the current HTML code for the form, as shown in the following screenshot.

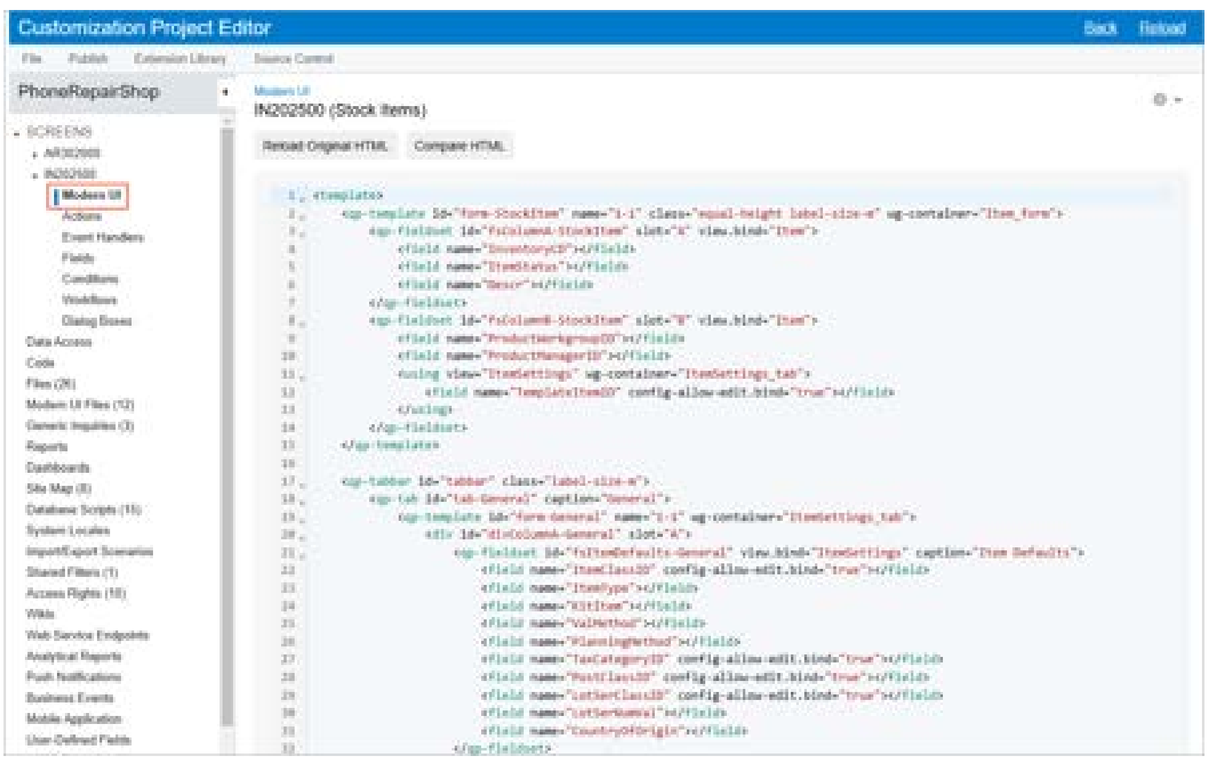


Figure: The form's HTML code

Use of the HTML Editor

You use the editor to make the necessary modifications to the layout of the form and generate an extension file. Once you have made the necessary changes, click the **Compare HTML** button. The system displays a dialog box that shows the code changes that you have made. In the **Extension Suffix** box of the dialog box, you specify the suffix for the extension file name, and click **OK**. The following screenshot shows an example.

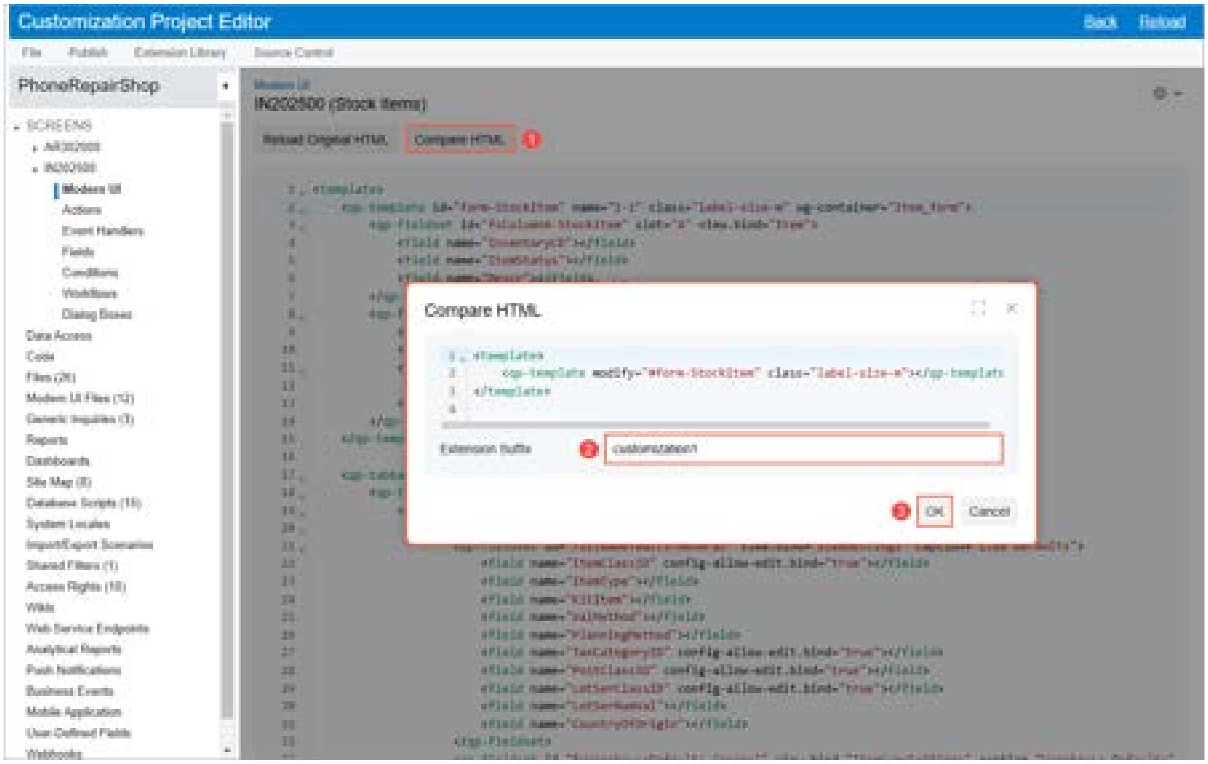


Figure: The Compare HTML dialog box

The system generates the extension file (in the specified subfolder in the FrontendSources\screen\src \customizationScreens\<Tenant Name>\screens\<FirstTwoLettersOfFormID>\<FormID> \extensions file path). It also adds this file to the Custom Files page under the **Modern UI Files** node, as shown in the following screenshot.

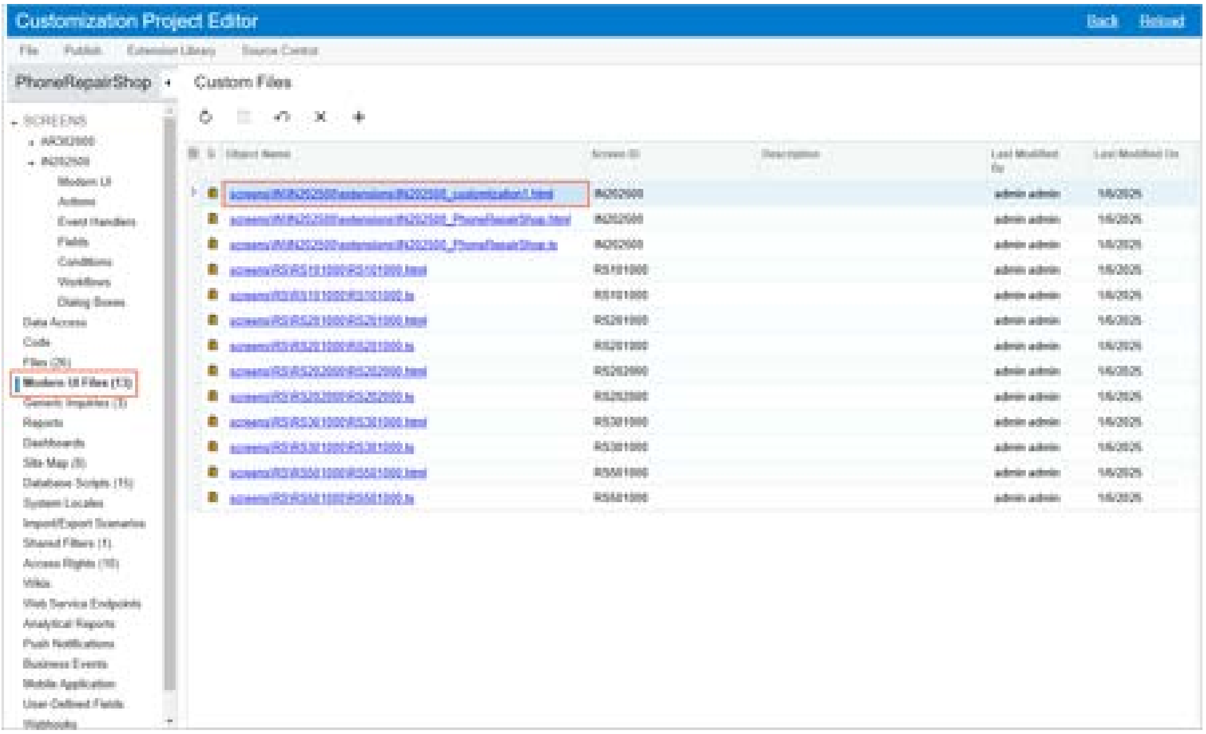


Figure: The Custom Files page and Modern UI Files node

> Currently you cannot generate the corresponding TypeScript extension file along with the generated HTML extension file by using the *Modern UI* (AU201080) page. This functionality will be available in a future release. As a workaround, you can manually create the TypeScript extension file with the needed code in the same folder where the HTML extension file was generated by the system.

You then publish the customization project and validate your changes by opening the corresponding form in your instance.

Modern UI: Functionality That Is Not Yet Supported

Even though Acumatica ERP has already been migrated to the Modern UI, some functionality and capabilities either have limited support or are not yet supported in the Modern UI. The following sections describe these limitations in Acumatica ERP 2025 R1.

User-Defined Fields

In the Classic UI, customizers could set up user-defined fields for a form by clicking **Customization > Manage User-Defined Fields** on the form toolbar. Once configured, these fields were located on the **User-Defined Fields** tab of the form. This tab is not available in the Modern UI.

In the Modern UI, customizers set up user-defined fields by using Form Configuration mode, which they can access for a form by clicking the Settings button on the form title bar and then clicking **Screen Configuration**. If a customization includes user-defined fields, the customizer must manually add these fields to the appropriate fieldsets after publishing the customization. For details, see *Modern UI: Managing User-Defined Fields*.

Pivot Tables

Pivot table are not currently supported in the Modern UI. Standalone pivot tables will be displayed in the Classic UI. If a pivot table was configured as a tab on a generic inquiry form and the form was switched to the Modern UI, the tab will not be visible unless the form is switched back to the Classic UI.

Screen Editor for the Modern UI

The *Modern UI* (AU201080) page, which is available in the Customization Project Editor, currently supports only the editing and generation of HTML extension files. At this time, the customizer cannot generate the corresponding TypeScript extension file along with the generated HTML extension file.

As a workaround, the customizer can manually create the TypeScript extension file with the needed code in the same folder where the HTML extension file was generated by the system. For details, see *Screen Editor for the Modern UI: General Information*.

Resource Usage Graphs

The graphs displayed on the **Resource Usage** tab of the *System Monitor* (SM201530) form in the Classic UI are not yet supported in the Modern UI.

Workflow Diagrams

In the Customization Project Editor in the Classic UI, a customizer can view a workflow diagram of the selected form. The customizer does this by clicking **Diagram View** on the page toolbar of the *Workflow (Tree View)* (AU201030) page. This diagram is not yet supported in the Modern UI version of the *Workflow (Tree View)* page.

It is also not yet possible to access the workflow diagram directly on a form by clicking the Settings button on the form title bar and then clicking **Show State Diagram**.

Rich Text Editor

In the Modern UI, the functionality related to the rich text editor is only partially supported. The options to insert links, tables, macros, and layouts is not yet supported.

Reports, Dashboards, Wikis, and Business Scenarios

All reports, dashboards, and business scenarios will be displayed only in the Classic UI. The same applies to the UI for viewing and editing wikis.