# Release Notes 2025 R1 Beta



# Contents

Copyright5
Introduction6
Installation and Upgrade Notes7
Post-Upgrade Changes and Actions10
CRM: Implementation of the ISO 20022 Address Format 11
CRM: Improvements to the Calculation of Case Commitments
DeviceHub: Polling Frequency Settings for DeviceHub Scales17
Documentation: Improvements in User Guides18
Field Services: Support of Stock Items With Lot or Serial Numbers Assigned in Appointments
Field Services: Improvements in Managing Project-Specific Inventory
Finance: Increasing of the Authorized Payment Amount27
Finance: Payment Receipts for Released Transactions 32
Finance: Prepayments from Sales Order Payment Links
Finance: Recording of Finance Charges for Refunds40
Finance: Support of the BAI2 Format by Bank Feeds42
Finance: Other Improvements
Integrations: Filtering in the Shop for Rates Dialog Box49
Integrations: Multiple Access Tokens for Each External Application50
Integrations: Multiple Access Tokens for Each External Application
Integrations: Multiple Access Tokens for Each External Application
Integrations: Multiple Access Tokens for Each External Application50Integrations: Removal of Obsolete FedEx and UPS Plug-Ins52Inventory and Order Management: Changes to Access Rights in Predefined User Roles53Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders56
Integrations: Multiple Access Tokens for Each External Application       50         Integrations: Removal of Obsolete FedEx and UPS Plug-Ins       52         Inventory and Order Management: Changes to Access Rights in Predefined User Roles       53         Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders       56         Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal Type       63
Integrations: Multiple Access Tokens for Each External Application       50         Integrations: Removal of Obsolete FedEx and UPS Plug-Ins       52         Inventory and Order Management: Changes to Access Rights in Predefined User Roles       53         Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders       56         Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal Type       63         Inventory and Order Management: Lot and Serial Attributes for Stock Items       73
Integrations: Multiple Access Tokens for Each External Application50Integrations: Removal of Obsolete FedEx and UPS Plug-Ins52Inventory and Order Management: Changes to Access Rights in Predefined User Roles53Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders56Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal63Inventory and Order Management: Lot and Serial Attributes for Stock Items73Inventory and Order Management: Receive Transfer Mode of the Receive and Put Away Form80
Integrations: Multiple Access Tokens for Each External Application
Integrations: Multiple Access Tokens for Each External Application
Integrations: Multiple Access Tokens for Each External Application50Integrations: Removal of Obsolete FedEx and UPS Plug-Ins52Inventory and Order Management: Changes to Access Rights in Predefined User Roles53Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders56Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal63Type63Inventory and Order Management: Lot and Serial Attributes for Stock Items73Inventory and Order Management: Receive Transfer Mode of the Receive and Put Away Form80Inventory and Order Management: Capturing Weights of Packages from DeviceHub90Inventory and Order Management: Other Improvements92Inventory Planning: Forecast Consumption Visibility93
Integrations: Multiple Access Tokens for Each External Application50Integrations: Removal of Obsolete FedEx and UPS Plug-Ins52Inventory and Order Management: Changes to Access Rights in Predefined User Roles53Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders56Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal63Type63Inventory and Order Management: Lot and Serial Attributes for Stock Items73Inventory and Order Management: Receive Transfer Mode of the Receive and Put Away Form80Inventory and Order Management: Other Improvements90Inventory and Order Management: Other Improvements92Inventory Planning: Forecast Consumption Visibility93Inventory Planning: Improved Traceability of Demand and Supply95
Integrations: Multiple Access Tokens for Each External Application50Integrations: Removal of Obsolete FedEx and UPS Plug-Ins52Inventory and Order Management: Changes to Access Rights in Predefined User Roles53Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders56Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal63Type63Inventory and Order Management: Receive Transfer Mode of the Receive and Put Away Form80Inventory and Order Management: Capturing Weights of Packages from DeviceHub90Inventory and Order Management: Other Improvements92Inventory Planning: Forecast Consumption Visibility93Inventory Planning: Improved Traceability of Demand and Supply95Localization (Canada): RBC ACH094 Plug-In for International Payments96
Integrations: Multiple Access Tokens for Each External Application50Integrations: Removal of Obsolete FedEx and UPS Plug-Ins.52Inventory and Order Management: Changes to Access Rights in Predefined User Roles.53Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders56Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal63Type.63Inventory and Order Management: Lot and Serial Attributes for Stock Items.73Inventory and Order Management: Receive Transfer Mode of the Receive and Put Away Form.80Inventory and Order Management: Capturing Weights of Packages from DeviceHub.90Inventory and Order Management: Other Improvements.92Inventory Planning: Forecast Consumption Visibility.93Inventory Planning: Improved Traceability of Demand and Supply.95Localization (Canada): RBC ACH094 Plug-In for International Payments.96Localization (Canada): Support of T4A Reporting.98
Integrations: Multiple Access Tokens for Each External Application
Integrations: Multiple Access Tokens for Each External Application.50Integrations: Removal of Obsolete FedEx and UPS Plug-Ins.52Inventory and Order Management: Changes to Access Rights in Predefined User Roles.53Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders.56Inventory and Order Management: Correction of Purchase Receipts for Purchase Orders with the Normal73Type.63Inventory and Order Management: Lot and Serial Attributes for Stock Items.73Inventory and Order Management: Receive Transfer Mode of the Receive and Put Away Form.80Inventory and Order Management: Capturing Weights of Packages from DeviceHub.90Inventory and Order Management: Other Improvements.92Inventory Planning: Forecast Consumption Visibility.93Inventory Planning: Improved Traceability of Demand and Supply.95Localization (Canada): RBC ACH094 Plug-In for International Payments.96Localization (Canada): Support of T4A Reporting.98Manufacturing: Due Date Handling in Production Orders.103Manufacturing: Enhanced Material Availability and Production Readiness Tracking.105

Manufacturing: Enhancements in Finite Production Scheduling108
Manufacturing: Other Improvements 109
Payroll: Accruing Time Off by Earning Type for PTO Banks110
Payroll: Detailed Pay Stub Reports112
Payroll: Summary Report
Payroll: Taxes by Code Report117
Platform: Improvements to the XML Import and Export Functionality118
Platform: Improved Licensing for Anomaly Detection in Generic Inquiries
Platform: Extended Support for Date-Relative Parameters123
Platform: Support for the Numeric Attribute Type125
Platform: Other Improvements126
Projects and Construction: AIA Report with Time and Material Lines128
Projects and Construction: AP Document Recognition for Projects131
Projects and Construction: Enhanced Usability for AP Documents with Multiple Projects
Projects and Construction: Enhancements to the Correction of Pro Forma Invoices
Projects and Construction: Enhancements to the Cost Projection Functionality138
Projects and Construction: Improvements to AR and AP Reports143
Projects and Construction: Improvements in Tracking Project Inventory149
Projects and Construction: Improvements to the Creation of Final Lien Waivers152
Projects and Construction: Improvements to the Construction Bonding Report
Projects and Construction: Improvements to the Subcontract Audit Report
Projects and Construction: Project Quotes in the Mobile App161
Projects and Construction: Usage of Free Stock for Projects with Project-Specific Inventory
Retail Commerce: Import of Orders Without Importing Customers166
Retail Commerce: Import of Shopify Documents in the Default Store Currency
Retail Commerce: Improvements to the Mapping of Taxes for Shopify169
Retail Commerce: Improvements to Synchronization of Price Lists with Shopify
Retail Commerce: Replacement of REST API with GraphQL API for Shopify
Retail Commerce: Synchronization of Shipments to Amazon Fulfillment Centers
System Administration: Email Scheduling for Reports
Customization: Access Rights for Custom Forms187
Mobile Development: Dialog Result for the Close Button189
Mobile Development: Displaying the Progress and Results of Processing
Platform API: Improved Logging in Connectors for External Systems
Platform API: Processing of API Rate Limits in a Connector for an External System
Platform API: Changes to the Image Processor Modules of the Shopify and BigCommerce Connectors196

Platform API: Changes to the Methods of the ARPaymentEntry Graph	197
Web Services: New PATCH Method in the REST API	198
Web Services: Tracking of Deleted Records Through OData	200
Web Services: New Manufacturing Endpoint	202
Workflow UI: Viewing of Workflow Changes	203
Fixes and Enhancements	205

# Copyright

#### © 2025 Acumatica, Inc.

#### ALL RIGHTS RESERVED.

No part of this document may be reproduced, copied, or transmitted without the express prior consent of Acumatica, Inc.

3075 112th Avenue NE, Suite 200, Bellevue, WA 98004, USA

### **Restricted Rights**

The product is provided with restricted rights. Use, duplication, or disclosure by the United States Government is subject to restrictions as set forth in the applicable License and Services Agreement and in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 or subparagraphs (c)(1) and (c)(2) of the Commercial Computer Software-Restricted Rights at 48 CFR 52.227-19, as applicable.

### Disclaimer

Acumatica, Inc. makes no representations or warranties with respect to the contents or use of this document, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Acumatica, Inc. reserves the right to revise this document and make changes in its content at any time, without obligation to notify any person or entity of such revisions or changes.

#### Trademarks

Acumatica is a registered trademark of Acumatica, Inc. HubSpot is a registered trademark of HubSpot, Inc. Microsoft Exchange and Microsoft Exchange Server are registered trademarks of Microsoft Corporation. All other product names and services herein are trademarks or service marks of their respective companies.

Software Version: 2025 R1 Last Updated: 01/29/2025

# Introduction

This document provides important information about fixes, enhancements, and key features that are available in Acumatica ERP 2025 R1. The document is designed particularly for those who install Acumatica ERP. All users can benefit from reviewing this content to determine how they may benefit from the changes in this release.

Information about fixes, enhancements, and key features for those who customize Acumatica ERP or develop applications for it can be found in the separate *Release Notes for Developers* document.

## **Beta Disclaimer**

THE BETA SOFTWARE LICENSED HEREUNDER IS BELIEVED TO CONTAIN DEFECTS, AND A PRIMARY PURPOSE OF THIS BETA TESTING LICENSE IS TO OBTAIN FEEDBACK ON SOFTWARE PERFORMANCE AND THE IDENTIFICATION OF DEFECTS. THE LICENSEE IS ADVISED TO SAFEGUARD IMPORTANT DATA, TO USE CAUTION, AND TO NOT RELY IN ANY WAY ON THE CORRECT FUNCTIONING OR PERFORMANCE OF THE SOFTWARE AND/OR THE ACCOMPANYING MATERIALS.

# **Installation and Upgrade Notes**

We strongly recommend that before administrators upgrade Acumatica ERP to a newer product version, they back up all configuration files and databases used by the application instances. For a detailed description of the general procedure of updating Acumatica ERP, see *Upgrading of Acumatica ERP: General Information*.

Multiple changes have been made between Acumatica ERP 2024 R2 and Version 2025 R1 that may affect customizations and integrations. For details, see *Release Notes for Developers*.

If the Acumatica ERP instance was integrated with software provided by an independent software vendor (ISV) partner, we recommend that the administrator consult with this partner about the compatibility of its products with Acumatica ERP 2025 R1.

### Supported Web Browsers for Acumatica ERP Workstations

Supported web browsers that can be used to work with Acumatica ERP 2025 R1 workstations are listed in the following table.



Web browsers on mobile devices are not supported. We recommend that the Acumatica mobile app be used. Microsoft Internet Explorer is not supported.

#### Table: Supported Web Browsers

Web Browser	Version
Microsoft Edge	120 or later
Mozilla Firefox	130 or later
Apple Safari	17 or later
Google Chrome	120 or later

For details on system requirements, see System Requirements for the Acumatica ERP Installation.

#### Deprecated Support for the Authorize.Net Payment Plug-In

Starting in Acumatica ERP 2025 R1, the Authorize.Net plug-in will no longer be supported or available in the system. We encourage companies to take advantage of the Acumatica Payments plug-in, which provides greater functionality, better support, and competitive rates.

The client should contact its partner to create a presales support case to learn more about making the transition.

If the company have customer credit cards saved in the Authorized.Net gateway, after an upgrade to Acumatica ERP 2025 R1, this data will be lost. The company should contact its partner for help with token migration.

If the company uses Acumatica ERP 2023 R2 or a later version, a system administrator can configure the Acumatica Payments plug-in without making any software changes. For more information about Acumatica Payments, see *Configuring and Using Acumatica Payments* and *To Configure Acumatica Payments*.

# **Deprecated Third-Party Software**

Starting in Acumatica ERP 2025 R1, the system no longer supports the versions of third-party software listed in the following table.

Software	Version
Windows Server	2016 64-bit edition
Microsoft SQL Server	<ul><li> 2016 Service Pack 1</li><li> 2017</li></ul>
MySQL Community Server	5.7

For details on system requirements, see System Requirements for the Acumatica ERP Installation.

# **Upgrade Policy**

On the *Apply Updates* (SM203510) form, only minor updates are available for the currently installed version of Acumatica ERP. The administrator should upgrade the Acumatica ERP instance from previous major versions of the system to Version 2025 R1 manually on the server. (An upgrade through the web interface is not supported because the customization of the Acumatica ERP instance may be incompatible with Version 2025 R1 due to changes in Version 2025 R1.)

### **Prerequisite Steps**

Before administrators install Acumatica ERP 2025 R1 or upgrade to it locally, they need to do the following:

- 1. Switch the Internet Information Services application pool where the Acumatica ERP 2025 R1 instance will be installed to Integrated mode. (Classic mode is not supported.)
- 2. Install Microsoft .NET Framework 4.8 on the server where the Acumatica ERP 2025 R1 instance will be installed.

### **Upgrade Path**

The upgrade to Acumatica ERP 2025 R1 must be performed as described in the following table. The upgrade process depends on the version before the upgrade.

From Version	Upgrade Path
2024 R2	A direct upgrade to Acumatica ERP 2025 R1 is supported.
2024 R1	A direct upgrade to Acumatica ERP 2025 R1 is supported.
2023 R2	A direct upgrade to Acumatica ERP 2025 R1 is supported.
2023 R1	An incremental upgrade is required. The following steps must be performed in the listed order: 1. Upgrade to the latest Version 2023 R2 build available.
	2. Upgrade to Version 2025 R1.

From Version	Upgrade Path
2022 R2	An incremental upgrade is required. The following steps must be performed in the listed order:
	<ol> <li>Upgrade to the latest Version 2023 R2 build available.</li> <li>Upgrade to Version 2025 R1</li> </ol>
	2. Upgrade to version 2025 R1.

Acumatica ERP 2025 R1 can be upgraded from the following particular versions:

- 2024 R2 Update 5 (Build 24.205.0015) and earlier
- 2024 R1 Update 14 (Build 24.114.0020) and earlier
- 2023 R2 Update 17 (Build 23.217.0011) and earlier

For the list of upgradable versions for later 2025 R1 updates, see the Release Notes for the particular 2025 R1 update.

# **Post-Upgrade Changes and Actions**

An administrator should be aware of the changes that have been made in the system after the upgrade to Acumatica ERP 2025 R1 has been performed. The following sections describe these changes, as well as any actions that the administrator needs to take after the upgrade.

# Finance

After an upgrade to Acumatica ERP 2025 R1, the following changes will be made in the system:

- On the *Payment Methods* (AR204000) form, the **Send Payment Receipts Automatically** check box will be cleared for all existing payment methods.
- On the *Payments and Applications* (AR302000) and *Cash Sales* (AR304000) forms, the **Don't Print** and **Don't Email** check boxes for existing documents will be selected. As a result, these documents will not appear for processing on the *Print/Email AR Documents* (AR508000) form.

### **Inventory and Order Management**

After an upgrade to Acumatica ERP 2025 R1, on the *Purchase Orders Preferences* (PO101000) form, the state of the **Display the Receive Transfer Tab** check box will be either of the following:

- Selected if the Display the Receive Tab check box was selected before the upgrade
- Cleared if the Display the Receive Tab check box was cleared before the upgrade

# **CRM: Implementation of the ISO 20022 Address Format**

Acumatica ERP 2025 R1 introduces the extension of postal address data settings system-wide to adhere to the ISO 20022 standard. Adherence to the ISO 20022 standard provides the following advantages:

- Enhanced consistency and accuracy of address data
- Improved interoperability with global systems
- Better data exchange
- More efficient processing of international transactions.

The following section describes the changes in address data settings.

### **Extended Address Settings**

Starting in Acumatica ERP 2025 R1, the following address settings have been added to the system:

- **Department**: The identifier of a large division within an organization or building
- Subdepartment: The identifier of a smaller division within a large division in an organization or building
- Street Name: The name of the street
- Building Number: The numerical or alphanumerical identifier assigned to the building
- Building Name: The name of the building
- Floor: The number indicating the level within the building
- Unit Number: The number identifying the particular unit or apartment if this is a multiunit building
- Post Box: The unique identifier for the private mailbox in a post office where mail is delivered
- Room: The specific room identifier within the building
- Town Location Name: The name of the town location
- District Name: The name identifying the subdivision within the city or town

By default, the extended address settings are not displayed on forms containing address data. Users can define which address settings should be displayed on specific forms as follows:

- On inquiry forms: By using the Column Configuration dialog box (see the following screenshot)
- On data entry forms: By using a customization project



Figure: The extended address settings in the Column Configuration dialog box

# CRM: Improvements to the Calculation of Case Commitments

In previous versions of Acumatica ERP, the calculation of case commitment statistics was affected by outgoing emails that the system created based on email templates. The system treated these emails as response activities —that is, activities of the *Email* type with the **Outgoing** check box selected on the *Activity Types* (CR102000) form. Thus, the system recognized the system email date and time as the response date and time, stopped tracking the time for fulfilling case commitments, and cleared the **Initial Response Due** and **Response Due** boxes for the case on the *Cases* (CR306000) form.

Starting in Acumatica ERP 2025 R1, the changes described in the sections below have been made to exclude system emails from the calculation time of fulfilling case commitments.

# **Enhancements to Email Activity Types**

To distinguish emails created by the system from other outgoing emails, the *System Email* activity type with the *ASE* type ID has been added to the *Activity Types* (CR102000) form. (The following screenshot shows this type.) Users cannot change the settings of this type or remove the type from the *Activity Types* form.

A	Activity Types customization toous •													
	6	D	Class	*Type ID	*Description	Active	System Default	Originat By	lmoge	Internal	Track Time and Costs	Incoming	Outgoing	
>	8		Event	AA	Event	P		ERP Usen	1			2	E.	
	0	۵	Email	AE	Email	2		Portal Use	0			8	23	
[	0		Email	ASE	System Email	1	D.	System		e	0	Ø		
	0		Activity	ASI	System Message	E		System	0	2	C)	R	11	
	8		Task	AT	Task	21	Ċ.	ERP User	3	B	0	2		
			Activity	c	Chat	E		ERP User	0			R		
			Activity	E	Appointment		0	ERP Usen			0		Ø	
	8		Activity	EN	Note	Ø	2	Portal Use	0					
	0		Activity	ES	Escalation	R		ERP Usen	0	B				
	8		Activity	м	Message	Ø		ERP User	9				Ø	

#### Figure: The System Email activity type

On the *Email Templates* (SM204003) form, the **Activity Type** box has been added (see the following screenshot). In this box, users can select the type of email activity for which the selected email template is created.

CRCasesNoA	tivityNotification						NOTES PI	LES C	USTOMIZ	ATION	TOOLS
n 10 10	• + ₪	0 ~ K	<	>	>1						
Notification ID	CRCasesNoActiveyNo	vification	ş		Link-To Entity				p		
Description	CRCasesNoActivityNo	offication			Link-To Contact:				ρ		
Screent	CR.30 60 NT - Case N	iolifications	ß	C.	Link-To Account			-	P		
From:			e		<ul> <li>Activity Type:</li> </ul>	Ernal			P		
Ta	(CRCase_ownerDE)	Mail().				Select - Ac	tivity Type				x I
CC. BCC:						SELECT	OH				P
Subject -	You have cases with r	o activities for more t	than 30	days		🖹 Type ID	Description		+	Activ	•
upperior a	TRACES DESAULT	THE R. LEWIS CO., LANSING	-			> AE	Enal			8	3
ISUAL • • •	C+ Paragraph +	BIN	•	۸.	≡.	ASE	System Email			8	3
or ((Const_BestNat	nell.	mans that 10 dairs									
Cese ID	Subject	Account		Ċ.	onlact				C.	3	31
DI	(ICRCase_sumed))	(CRCase_outome D_description)		CRICH Deb	e_contactID(C	RCase_status)	()CRCase_priority()	ECRA MINO		nesi, vh/D	

#### Figure: The Activity Type box on the Email Templates form

The **Activity Type** box has the following options:

- Email (default): The email template is intended for emails created by users.
- System Email: The email template is intended for emails created by the system.

The System Email activity type is selected by default in the following predefined email templates on the Email Templates form:

- CRCasesPendingClosureNotification
- CRNewCaseNotification
- New Case Comment from Portal

If an email template has the *System Email* activity type, it cannot be selected in the **Select Template** dialog box on the *Email Activity* (CR306015) and *Mass Emails* (CR308000) forms.

The read-only **Type** box has been added to the *Email Activity* form (see the following screenshot). This box displays the activity type of an email.

Email Acti	ivity		(	NOTES	FILES	CUSTOMIZATION	TOOLS
+ From	System			P			
TO:	"Abdul W	aheed" X		P			
CC				Q.			
BCC				,p			
Subject	Thank yo	u for the call					
MESSAGE	DETAR	s					
Туре:		AE - Email		]			
Created On	5	12/24/2024 6:15 AM					
		Incoming				Track Time and	Costs
		[] Internal					
Workgroup			Q				
Owner		Kimberly Gibbs	p				
In Respons	of 10						
Related En	dty Type						
Related En	$\alpha_T$			C <sup>2</sup>			
Parent Activ	vity:						
Ereal Chat.		Deat					

Figure: The Type box on the Email Activity form

By default, the *Email* option is selected.

# **Enhanced Case Commitment Calculations**

The **Include System Activities in Response Time Calculation** check box has been added to the **Commitments** tab of the *Case Classes* (CR206000) form, as shown in the following screenshot. This check box gives users greater flexibility in calculating response time for the fulfillment of case commitments.

							0	OTES ACTIV	THES FILES	CUSTOMIZA	TION TOOLS	s •
DE	ELIVER	Y - Si	ale and	delivery of	f products, su	ch as fruit, jan	ns, tea, and	d juicers				
*	-53	50	0	+ =	O - K	< > >						
	Case Class	10		DELIVERY		Q	• Work Calend	ter: 24	H7WD - 24x7		P 0	^
	Description	κ.		Sale and delive	ery of products, suc	th as fr.	Workday Ho	urs. 24	00			
0	ETAILS	COX ting Tin	MITMEN	ITB ATTR	BUTES es inactive	- 0	Include Syste	n Activities in Re	gorise Time Calcu	lation		
	o +	×	н	80								
	Severity		Enable	Tanget Initial Response Tiche	Initial Response Extension	Enable	Target Response Time	Response Extension	Enable	Target Resolution Time	Resolution Extension	
2	High			Disabled	Disabled	- 🗆	Disabled	Disabled	2	001d 00h	000d 00h 00r	m
	Low		0	Disabled	Disabled	0	Disabled	Disabled	21	005d 00h	0004 005 00-	-

Figure: The Include System Activities in Response Time Calculation check box

If the check box is selected, the system includes emails with the *System Email* activity type in the response time calculations in cases of the case class. This means that the system considers these emails to be responses, records their date and time for statistical purposes, and stops counting time for fulfilling case commitments. (This is the way the system worked prior to Acumatica ERP 2025 R1, which may cause unintended inaccuracies in case fulfillment statistics.)

By default, the **Include System Activities in Response Time Calculation** check box is cleared, meaning that system emails are excluded from the calculation of response time for fulfilling case commitments.

# DeviceHub: Polling Frequency Settings for DeviceHub Scales

In Acumatica ERP 2025 R1, users can now specify the frequency of polling for scales in DeviceHub.

# Specifying the Polling Frequency

A user can now change the frequency of polling for DeviceHub scales in the new **Scale read intervals** section, as shown in the following screenshot.

Seneral Connection F DeviceHub ID: DeviceHub	Processing Lo 12 port support	g Printers	Digital Scales Scanners			
Methods of retrieving	g print jobs ntions econnection		Scale read intervals Scale read interval: Multiple scales read interval:	300 100	•	ms ms
Do not poll lest.	5 ¢	BEC BEC				
Open configuration	file		ок		Can	cel

#### Figure: The Scale read intervals section

The section contains the following boxes:

- **Scale read interval**: This setting defines the minimum delay in milliseconds before DeviceHub can poll another scale and send the result to Acumatica ERP.
- **Multiple scales read interval**: The application polls all scales added to DeviceHub one by one. A single polling request to all of the scales constitutes a cycle. Once every scale has been polled, the application starts a new cycle. This setting defines the minimum delay in milliseconds before DeviceHub can start another cycle of polling.

# **Documentation: Improvements in User Guides**

In Acumatica ERP 2025 R1, significant improvements have been made to the content and structure of the guides that make up the documentation, as described in the following sections.

## **Accounts Payable**

In the Accounts Payable Guide, the following changes have been made:

- The former *Configuring Predefined Mailings for Customers and Vendors* chapter has been reworked into the *Configuring Predefined Mailings for Vendors* chapter. This chapter describes how to configure predefined mailings for vendors and how to use these mailings for sending and printing documents.
- The former *Configuring the Reclassification of Expenses* chapter has been reworked into the *Configuring Reclassification of Expenses* chapter. This chapter describes how to create a document with the default expense account and reclassify this expense.
- The former *Managing Vendor Relations* chapter has been reworked into the *Managing Vendor Relations* chapter. This chapter describes how to set up the vendor relations functionality and process a purchase from one vendor and the payment for the purchase to a different vendor.
- The former *Rounding of Document Amounts* chapter has been reworked into the *Rounding of AP Document Amounts* chapter. This chapter describes how to set up document amount rounding and process an AP document with a rounded amount.
- The former *Configuring Schedules for Recurring Documents* chapter has been reworked into the *Creating Recurring AP Documents* chapter. This chapter describes how to configure a schedule for document generation, run this schedule, and process the generated documents.
- The former *Applying Payments to Particular Lines of AP Documents* chapter has been reworked into the *Applying Payments to Particular Lines of AP Documents* chapter. This chapter describes how to create an AP bill that can be paid by line and pay one of its lines.

All the added chapters include activities that users can perform by using the U100 dataset.

## **Accounts Receivable**

In the Accounts Receivable Guide, the following changes have been made:

- The *Configuring Predefined Mailings for Customers* chapter has been added. This chapter describes how to configure predefined mailings for customers and how to use these mailings for sending and printing documents.
- The former *Types of AR Documents* chapter has been replaced with the *Processing Cash Sales and Cash Returns* chapter. This chapter explains how to process a cash sale and a cash return.
- The former *Rounding of Document Amounts* chapter has been reworked into the *Rounding of AR Document Amounts* chapter. This chapter describes how to set up document amount rounding and process an AR document with a rounded amount.
- The former *Configuring Schedules for Recurring Documents* chapter has been reworked into the *Creating Recurring AR Documents* chapter. This chapter describes how to configure a schedule for document generation, to run this schedule, and process the generated documents.
- The former *Applying Payments to Particular Lines of AR Documents* chapter has been reworked into the *Applying Payments to Particular Lines of AR Documents* chapter. This chapter describes how to create an AR invoice that can be paid by line and pay one of its lines.

All the added chapters include activities that users can perform by using the predefined U100 dataset.

### **Service Management**

The new *Integrating Field Servies with Projects* chapter has been added. This chapter explains how to integrate the service management functionality with the project management functionality to enhance users' ability to effectively manage project tasks and resources. The chapter describes in detail the setup and use of the service management functionality in projects.

#### **Route Management**

The following chapters have been added to the guide:

- Route Executions with Service Delivery
- Route Executions with Item Delivery

In these chapters, you will learn how to do the following:

- · Create a route execution that involves service delivery or the movement of inventory items
- Add appointments to a route
- View a route on the map
- Modify the route execution document
- Edit the order of appointments in the route execution
- Start, complete, and close the route execution
- Run route appointment billing

# Field Services: Support of Stock Items With Lot or Serial Numbers Assigned in Appointments

Appointments often include stock items. In some cases, lot or serial numbers need to be assigned to these stock items at the time they are used during an appointment, rather than when they are received in the warehouse. This is often necessary when, for example, the specific item to be installed at the customer location is unknown beforehand, and the technician needs to enter the relevant number during installation.

In previous versions of Acumatica ERP, appointments that included stock items tracked by lot or serial numbers could not be processed if stock items had the *When Used* assignment method. This method is specified in the stock item's lot or serial class on the *Lot/Serial Classes* (IN207000) form. This was because a lot or serial number had to be specified for a stock item in the appointment's detail line. However, stock items with the *When Used* lot or serial number could not be specified for them.

Starting in Acumatica ERP 2025 R1, the *Appointments* (FS300200) form has been enhanced. Users can do the following for stock items whose lot or serial class has the *When Used* lot or serial number assignment method specified on the *Lot/Serial Classes* (IN20700) form:

- Manually generate lot or serial numbers for stock items, if the **Auto-Generate Next Number** check box is cleared in the stock item's lot or serial class on the *Lot/Serial Classes* form.
- View the auto-generated lot or serial numbers for stock items, if the **Auto-Generate Next Number** check box is selected in the stock item's lot or serial class on the *Lot/Serial Classes* form.



The functionality is available only if the *Lot and Serial Tracking* feature is enabled on the *Enable/ Disable Features* (CS100000) form.

# **Changes to the Appointments Form**

On the *Appointments* (FS300200) form, a lot or serial number can now be assigned to a stock item with the following settings specified in the stock item's lot or serial class on the *Lot/Serial Classes* (IN207000) form:

- The Track Serial Numbers or Track Lot Numbers tracking method (Item 1 in the following screenshot)
- The When Used assignment method (Item 2)

(The following screenshot is provided to illustrate the settings closely related to the new functionality. However, no new elements have been added to the *Lot/Serial Classes* form.)

Lot'S SRI	NJCR -	clas	s for t	racki	ng ju	icer	s by s	serial	numb	oers		NOT	ES	ACTIVITIE	្	FILES	TOOLS .
2)	8	0	+	0	0	•	ĸ	<	>	×							
*0	ass ID.				SI	NUC	R				P						^
E	escription	Ř.			Cla	ess fo	r tracki	ng juice	rs by se	rial nur	nbe						
1	racking N	lethod:			Tra	ick S	erial Nu	mbers		11							
					01	rack.	Expirat	on Date	e .	-							
						lequi	red for I	Drop-sh	ip :								
1	ssignmer	nt Metho	od.		W	ien U	sed					2					
1	kuto-Incre	mental	Value:			uto-(	3enerat	e Next I	Number	3							
h	fax Auto-	Genera	de Numi	bers			0										
N	IMBERIN	G SET	TINGS														
0	+	×	H	x													
8	Segment Number	Туре		Va)	ie))												
>	1	Cons	tant	AI	00001												

#### Figure: The stock item's lot or serial class settings

This functionality applies only to customers with a billing cycle set up to process billing for appointments.

The way a lot or serial number can be assigned to a stock item depends on the state of the **Auto-Generate Next Number** check box (Item 3 in the screenshot above) in the settings of the stock item's lot or serial class. The number is assigned as follows:

- If the **Auto-Generate Next Number** check box is selected, the system generates a lot or serial number for the stock item automatically and inserts it in the **Lot/Serial Nbr.** column in the item's line on the **Details** tab of the *Appointments* form.
- If the **Auto-Generate Next Number** check box is cleared, a user can initiate the generation of the lot or serial number on the *Appointments* form. To do this, the user first selects the detail line with the stock item and clicks **Lot/Serial Nbrs.** on the table toolbar of the **Details** tab. The user then clicks **Generate** in the Selection area of the **Line Details** dialog box.

In the **Line Details** dialog box, the following elements have been added to the Selection area (see the following screenshot):

#### Field Services: Support of Stock Items With Lot or Serial Numbers Assigned in Appointments | 22

1.3

Figure: The new UI elements in the Line Details dialog box

- Unassigned Qty.: The quantity of stock items that have no lot or serial numbers assigned.
- Quantity to Generate: The quantity of stock items for which lot or serial numbers will be generated. The system automatically inserts the value copied from the Actual Quantity column in the stock item's detail line on the Details tab. The user can edit this value. If the user specifies a smaller number than the actual quantity, the system generates the specified number of lot or serial numbers. When the user opens the dialog box again to generate lot or serial numbers for the remaining stock items, the system displays the actual quantity minus the number of items for which lot or serial numbers have already been generated.

For stock items whose lot or serial class settings require auto-generation of the lot or serial number, the **Unassigned Qty.** and **Quantity to Generate** boxes contain 0 by default. This is because the lot or serial numbers are automatically generated by the system when the appointment is saved.

- **Start Lot/Serial Number**: The alphanumeric value to be used as a start number for the lot or serial numbers. The system uses the value specified in the stock item's settings.
- **Generate**: A button that initiates the process of generating lot or serial numbers. When a user clicks this button, the system generates lot or serial numbers for the specified quantity of stock items, and lists them in the **Lot/Serial Nbr.** column, as shown in the following screenshot.

Liter Setals	- 2.1	Chever					
0 + + >	(3)					Contrast.	1.51.8
	( and the second	Labourde .	1000	-	(and party in the local section of the local sectio		
· Allertown			140.000				
Converse .	(main)	-	100.7008				
and the second	sinch.	100	100.1003				
Converse .	1000		100,000				
- Corner			14 144				

Figure: The generated serial numbers



For stock items with the *When Used* assignment method, lot or serial numbers cannot be generated and assigned in service orders on the *Service Orders* (FS300100) form. Additionally, the serial or lot numbers for stock items with the *When Used* assignment method generated in appointments on the *Appointments* form are not copied to related service orders.



The described functionality is not available in the Acumatica mobile app.

# Field Services: Improvements in Managing Project-Specific Inventory

In previous versions of Acumatica ERP, the project-specific inventory functionality was not fully integrated with the service management functionality.

When an appointment or a service order was linked to a project with *Track by Project Quantity and Cost* selected in the **Inventory Tracking** box on the **Summary** tab of the *Projects* (PM301000) form, the system had the following limitations:

- For project stock items (those with the *Project* cost layer) whose lot or serial class had the *Track Serial Numbers* or *Track Lot Numbers* specified as the **Tracking Method** on the *Lot/Serial Classes* (IN207000) form, serial or lot numbers were not available on the **Details** tab of the *Service Orders* (FS300100) and *Appointments* (FS300200) forms.
- For project stock items whose lot or serial class had *Not Tracked* selected as the **Tracking Method** on the *Lot/Serial Classes* form, inventory allocations for the item plans *FS Booked* and *FS Allocated* were created in the system with the *Normal* cost layer. As a result, the available quantities for a specific project displayed in the table footer of the *Service Orders* and *Appointments* forms for a selected item could be inaccurate before the appointment or service order was billed.

Starting in Acumatica ERP 2025 R1, the *Service Orders* and *Appointments* forms have been enhanced to support projects where *Track by Project Quantity and Cost* is specified in the **Inventory Tracking** box on the *Projects* form. These enhancements include the following:

- Serial and lot numbers for project stock items are now available for selection on the *Service Orders* (FS300100) and *Appointments* (FS300200) forms.
- For lines with stock items and a specified project task, the system now displays project-specific quantities in the table footer at the bottom of the **Details** tab of the *Service Orders* and *Appointments* forms.
- The Project cost layer is now assigned to inventory allocations created for service documents.



To make it possible to manage project stock items, the *Project-Specific Inventory* feature must be enabled on the *Enable/Disable Features* (CS100000) form.

These enhancements are described in detail in the next section of this topic.

### Improvements to Managing Project Stock Items in Service Documents

For service orders and appointments linked to projects with *Track by Project Quantity and Cost* specified in the **Inventory Tracking** box on the *Projects* (PM301000) form, the following changes have been implemented:

• In the Line Details dialog box of the *Service Orders* (FS300100) form, serial or lot numbers are now available in the Lot/Serial Nbr. column for a project stock item tracked by serial or lot number. The Line Details dialog box opens when a user selects a detail line and click the Line Details button on the table toolbar of the Details tab (see the following screenshot).

er fan 19 2 2 sammer Statiste Statiste Statiste 19 30 Statiste 2 sammer Statiste Statiste Statiste 19 5 Statiste Statiste Statiste Statiste Statiste Statiste 19 5 Statiste Statiste Statiste Statiste Statiste Statiste	Conservation Address Conservation Conservation Back Conservation Conse							
Live Dehalls								10
0 + X H B						farmette .	+	
They are an array from the	Littlere mit		towny .	-	The Printer Later		e broot	
a second a second of and	al months		1.00		CO.C.C.C.C.C.C.C.C.C.C.C.C.C.C.C.C.C.C.			
+					<b>H</b> = 1	1		1
0			1	_				H
	O Las faces for	V Reported	The Distance		Rear Line			
		111143		Autore	115 Sec. 1			123
17 C	1,10000000	care-com	1.00	100				100
	Among	Egometrie	1.00	1.00				
	A 204000	EQUIVELINE	1.00	1.00				
	10004	ELPHONE	100	1.00			-38	
2	A DECK	600%-CUB	100	1.00				1
	12108	E20PHD/88	100	1.00				
	12007	Egonorial	100	1.00				
	10000	EQUIPACIAN AND AND AND AND AND AND AND AND AND A	1.00	1.05				
	Calenda	ani even a	100	1.38				
	A DOMESTIC	Equiviount	1.00	1.98				
	10000	ELM-CON	140	1.0				
	A DOUBLE A	CO/PPCOM	100	1.00				
	and and a second s	EQUIPHONE:	1.00	1.00				

Figure: The lot or serial numbers for a project-reserved stock item

i

For stock items whose lot or serial class has the *When Used* assignment method specified on the *Lot/Serial Classes* form, a serial or lot number can be assigned only on the *Appointments* (FS300200) form.

• On the *Appointments* form, in the lookup table of the **Lot/Serial Nbr.** column on the **Details** tab, only the serial or lot numbers for the selected project stock item are displayed (see the following screenshot. .A user can select the serial or lot number in this lookup table.

R COTTA - Sur Parcel												-2	eine einelle en	
	line	-												
the star of the second second second second					-									
1 + 2 + blan langerer sons tensingent, im	the set	No. March		-										- 11
A DA DESCRIPTION OF A D	- and	100	1.1	-			100 C (4		-	1.00			-	
ALL	distant.	where the			-						1.00		the same	
							72	1						
	-													
	A. 1997	-	-	-	-		11							
		and the other designs of the local division of the local divisiono	-	-		- 10								
	C. C. Antonious	interest and		-	1.00			1						
		Long-Property	-	-	-	1.00								
		The Party of the P	_	_										
	10000		- 22 - 1		1.1									
	C atomas	Construction.	-	_	1.00									
	C annual l	Pinters and												
	- Annalised	Page and the	-	mine .	1.00	1.00								
	C domestic	and the second second	100	-										
	i content	adaptivity of	-	-	1.0	14								
	allowed in	Fighter di	1994	100		100								
	- president	10,000,000		-		.79								
	D.													
					-	-	0.000	_	_					
the state of the s	-					-			-					

Figure: The list of serial numbers available for the selected project-specific stock item

• On the *Appointments* form, in the **Line Details** dialog box, only serial or lot numbers of the selected project stock item are displayed. (This dialog box opens when a user selects a detail line and clicks **Lot/Serial Nbrs** on the table toolbar.) A user can view the serial or lot number in this box.

- On the Service Orders and Appointments forms, at the bottom of the **Details** tab, the table footer displays the project stock quantities and free stock quantities of the selected item (see the following screenshot) as follows:
  - The first value (before the slash) shows the available quantity of stock items in the *Project* cost layer related to the selected project and project task.
  - The second value (after the slash) shows the quantity of free stock items (that is, of the *Normal* cost layer) and project stock items stored in the warehouse location that is specified in the line.

PR 00000-1	* 8 0 ·			-													-	-	*****	Padd.	105,0
ttu lit	1			HH	1131	11	11111														
0 + 7			stati press	-	-	-												1.44	1.1		114
		-	-	-	-	inter l	110	-	-2	-	-	=	-	-	12.3	-	-		-	1	=
states 7	arian .		FARTENAK.	-	-	-					term.	Sec.	14	1. 198	1.1		100	1.10	100		-
stilles .	when inside	er of mainteel at he comment lines	Elastrona.	- 100	win	11000	140	1.00	-	410	11.01	1000	110	100			198	-	-	4	-
1		an arrest frame in Frame		incase ( 10)			_	_	_	_	_		_	_	_	_	_	_	_	_	

Figure: Project-specific and free stock quantities displayed in the table footer

• The system can now manage the allocation of stock items with a *Project* cost layer type. It automatically determines and assigns the appropriate allocation type (for example, *FS Prepared*, *FS Booked*, and *FS Allocated*) along with the *Project* cost layer when creating allocations for service documents that include project stock items tracked by serial or lot number. Users can view these allocations on the *Inventory Allocation Details* (IN402000) form.

0 0	MENORYSU	MONTY											
-			100	(b) Net		- Mar	Inc. Inc. inc.						
-		12,000	of manhadra in	-		a line	10		1.12				
Loom		ingen (		designed to the owned	200		and Location Int lies						
Labe				Building to Social	71.0	1.0	out found and 10	. Inchant	-				
Ser.			PELE										
-	an interna	in Frent											
VENDO		in Form									Milwark		. v
MEN-DO		a for	Decement Span	Average in:	-		LENSE Noter		100 Color	keest 2	M facada accast faces	10.00	· V
VEN DO	Till Basket	an forg	Descent for	Perfection Inc.			100	-	100 100 100 100 100 100 100 100 100 100	Accent 2	M Brands Annual States Factor States & Seas	10.00	V Norm

Figure: An allocation type specified according to the Project cost layer

# Finance: Increasing of the Authorized Payment Amount

In previous versions of Acumatica ERP, for a payment whose payment method has the *Credit Card* means of payment, a user could capture an amount that was less than or the same as the authorized payment amount. However, there was no way to increase the captured amount so that it exceeded the authorized amount. To work around this limitation, the user could void the authorization and create a new one; however, the system required some time to complete the voiding process. This sometimes resulted in reserving excess funds being reserved on the customer's account.

Starting in Acumatica ERP 2025 R1, for payments by credit card, users can increase the authorized amount. The system will change only the authorized amount in the original transaction. The other transaction settings, such as the expiration date, will not change.

The following sections describe the changes to the UI and document processing to support this functionality.

### **Changes to the Processing Centers Form**

On the *Processing Centers* (CA205000) form, the following sections have been added to the Summary area:

- **Payment Profile** (see Item 1 in the screenshot below). The following check boxes have been moved to this section: **Allow Saving Payment Profiles**, **Synchronization Deletion**, and **Accept Payments from New Cards**.
- Payment Processing (Item 2). The following check boxes have been moved to this section: Accept
  Payments from POS Terminals, Allow Unlinked Refunds, and Allow Payment Links. Also, the new Allow
  Increasing Authorized Amounts check box has been added to the section (Item 3). When this check box
  is selected, users can increase the authorization amounts for documents on data entry forms. The check
  box is available only if the selected processing center plug-in supports the functionality of incrementing
  authorization amounts.

ACUPAYMENT -	Acumatica Payments	In women wommans were controled to the topics +
• B B	A) +             A + R + A + A + TEST CREDENTIALS	
Proc. Cardial (D     Norm)     Cool Account     Contractory     Program Propin	ACUPROMENT () Acamatica Paymenta 15200 - Company Oberking / () USD Actives Actives Acamatica Payments plag-in ()	WINEST PROCESSING WINEST PROCESSING WINEST Processing Automatics Accept Payments from POS Technicals Allow Payments (1949
PUUG IN TARAMET	RE ANNENT METHODS PREPERINCES FEES	0
0 + ×	HE	
B10 1	Taxington	Titles .
> APREY	API Secret Key	
HASHKEY	API User Hash Key	and and a second se
LOCATIONID	Location ID	and and a second
RENDLINSTTL.	Allow refund for unsettled Card Not Present transactions	8
TESTMODE	The processing mode for the request. Select Live Mode to process live transactions or Test	Mode to lead your setup. Test Mode
USERID	API User ID	and the second se
WEBHOCKPVD	Password for webhook authorization	ana
TIEBHOOKUSB	Usemane for webhook authorization	24144

Figure: UI changes on the Processing Centers form

## Changes to the Sales Orders Form

On the **Payments** tab of the *Sales Orders* (SO301000) form, the **Increase Authorized Amount** button has been added to the table toolbar (see the screenshot below). This button appears on the form only if the selected order type has one of the following behaviors:

- Blanket Order
- RMA Order
- Sales Order
- Invoice

80 000116 - Alta Alte *- *1 *1 *	е о- н	C 3 X 1000	records	CARACE NAMES	10.0 -			Decus	4055/181	FLO (LATING	2708 - 1002 -
Contentian     Contentian	A Constant A Constant	Autoritikkii Akuke Bildo Penany saadee Audo konstrog USD // 1 B · VB/ 1 - Sae Pajad Cale		Denned Go Sound Vind Line Denned His Frangel Han Ten Tank Denne Vind State Vind	206 498.00 505 505 505 505 506 506 506 506 506 5	-	Lines	101103			
0 + × DRAM	NUMERT CREATE PR	element carture of	DE CARDIETT	WWW	interest of passion in a	Atte	+			And Amount	100
R & D Inclus	Cadesard Mit	Anne in Stanford	tages 1	nia -	Passed for	August Berlink	1 and 4 co	Pana da	Authorization Antonio	an harapet	44.00
F B C Payment	IREAL .	4010 0.00	10.1	Tenderg Precessing	numerical solution	ACUMINECE	HOW	E farmer	deal	ine Pad Tel Telephi	41.0 1.0
										prime form	- 25.55 845.65

#### Figure: The Increase Authorized Amount button on the Sales Orders form

The button becomes available if all of the following conditions are met:

- The sales order has an unapplied amount.
- The payment method of the payment selected on the **Payments** tab has the *Credit Card* means of payment specified on the *Payment Methods* (CA204000) form.
- The processing center used for the selected payment has the **Allow Increasing Authorized Amounts** check box selected on the *Processing Centers* (CA205000) form.
- The processing status of the payment on the **Payments** tab of the Sales Orders form is Pre-authorized.

When the user selects a row with a payment and clicks the **Increase Authorized Amount** button, the **Increase Authorized Amount** dialog box is opened (see the following screenshot).

Beer Other BO 000119 - AMI Ace *	в а- н	к з и п	III EMAILEMAN	- 100		Division	worker no	9 INTRACTOR	P30.4 -
+ Conte Type 100 Close Nov Address Robus Davie + Conte November • Research Line 10000000	B +Damme B +Damme Contact T Contact T Contact T Contact	AACARTONIN Alla Ann A MAR Prinse La adam Anala Anamang J Liko Ji Liko - VEP AACA 1. Nan Anger Cane	/ Crement Day / Densel Tass / Densel Tass Densement Den / Franger Tass	236 400.00 410 238 126					8
Contrast that Science Association (197-102) Trapping (1) (1) + (1) Children (1) Chil	Increase Authorized A Type Reference The Europey	Nouri Payment sittabil vitta	Sarbar Inn feal arts (press) Version	Ale Areas Journal of Lense	10000071 0	tione, inter		the furness	18
P + Q -man Spec	Address Annual Address Street	413 414	handing Privatelage	Namericki, Indefinitional Colfine	Academic Street	1000	400.00 1000	Andreas Andreas Andreas Andreas Andreas	1 2 0 X
	Applied to Transmer	HORAN DAY	<b>8</b> .					Constant Balance	276.66 878.66

Figure: The Increase Authorized Amount dialog box

#### Changes to the Invoices Form

On the **Applications** tab of the *Invoices* (SO303000) form, the **Increase Authorized Amount** button has been added to the table toolbar (see Item 1 in the screenshot below).

The button becomes available if all of the following conditions are met:

- The sales invoice has an unapplied amount.
- The payment method of the payment selected on the **Applications** tab of the form has the *Credit Card* means of payment specified on the *Payment Methods* (CA204000) form.
- The processing center used for the selected payment method has the **Allow Increasing Authorized Amounts** check box selected on the *Processing Centers* (CA205000) form.
- The processing status of the payment on the **Applications** tab of the *Invoices* form is *Pre-authorized*.

When the user selects a row with a payment and clicks the **Increase Authorized Amount** button, the **Increase Authorized Amount** dialog box is opened (see Item 2).

There a ARCIST - Alla Aca	к сэ ж —					Divite	A.79781	Pas sanacina	1000.8 +
ligh Annua Constant Annuau Mu Annual J Constant Annuau Mu Annual J Constant Annuau Mu Annual J Constant Constant (Inc. Annual Constant (Inc. Annual Constant (Inc.) Annual Constant (Inc.)	Accustolidad Alabas a Mala Peneg saster a Mala Nosa a Mala Nosa a Mala Sas Mala Mala Sas Mala Sas Mala Mala Sas Mala M	Date find and and and and and and and and and a							
Office         Image State         Image State <t< td=""><td>The Hase Authorized Ansamt Name Processed Intervention HIGHE Control HIGHE Antimized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER</td><td>×</td><td>angodines Linner Mit</td><td>H H</td><td>NUMBER AND</td><td></td><td>H B Taning Process</td><td>Antonia Antonia Dal Pay Dal Pay Dan Jako Dal Pay</td><td>*** *** *** ***</td></t<>	The Hase Authorized Ansamt Name Processed Intervention HIGHE Control HIGHE Antimized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER Authorized HIGHER	×	angodines Linner Mit	H H	NUMBER AND		H B Taning Process	Antonia Antonia Dal Pay Dal Pay Dan Jako Dal Pay	*** *** *** ***

Figure: UI changes on the Invoices form

If a user clicks this button, the system checks whether the payment is applied to multiple sales invoices or to a sales invoice and a sales order that is not related to the invoice. If this condition is met, the system displays a warning message.

#### Changes to the Credit Card Processing for Sales Form

On the Credit Card Processing for Sales (SO507000) form, the following UI changes have been made:

- In the **Action** box, the *Increase Authorized Amount* option has been added to the drop-down list (see Item 1 in the following screenshot).
- If the *Increase Authorized Amount* option is selected, the **Increased Authorized Amount** and **Increased Applied Amount** columns appear in the table (Item 2).

The **Increased Authorized Amount** is the unapplied balance of the sales order or sales invoice added to the current amount authorized for the payment. The **Increased Applied Amount** is the amount that will be applied to the sales order or sales invoice after the authorized payment amount is increased.

O in mo	center process au	0-	н. в	v									1081040	official focula
-	NUMBER AND ADDRESS AND ADDR	-)	0 141	an 112 m 127	04 (F									
1.0.77.94	Advances.	Tanat.	Taplard Visit	-	1 and 1	Arrested Arrested Arrested	Access of	-	Pro, State	THE OWNER	1222	-	Party States	-
	Andread Ann	torest .	Canal Canal Marche		- and a state	All shared at the state of the			Providence.	-	1000	time in the	Report Marian	tanan in
	Automation and Automation	torest and schools	1 22	ANCORTONION ANCORTONION	i anima Barta Markas Markas	Animateri Animateri Animateri Animateri Animateri Animateri		Transfer Processor	Proc. States		)] # # #	transloan Manufaca Manufaca	Numeri Medicali Alla Medicali Alla Medicali	Salar Date Salar Date

#### Figure: The UI changes on the Credit Card Processing for Sales form

When a user selects a payment and clicks **Process** or **Process All** on the form toolbar, the system performs the following actions for each selected row:

- 1. Checks if the payment in each selected row has an available balance. If a payment's balance is greater than 0.00, the system displays an error message.
- 2. Sends an API request for the rest of the selected payments and updates the payments and their application details upon successful authorization. If the API request has returned an error, the authorized amounts remain the same and the payment amount and applied amount are not updated.

The **Increase Authorized Amount Before Capture** check box has been added to the Selection area of the form (see the following screenshot). The check box appears and is available for selection if the *Capture* option is selected in the **Action** box.

When this check box is selected, the **Increased Authorized Amount** and **Increased Applied Amount** columns appear in the table. If these columns contain values, the authorized payment amount can be increased for the row. If these columns are empty, the capture process will be applied to the payment amount in the row when **Process** is clicked.

0 0	-	iCa n	d Process Hocens	ing for Sales Process ma	. é.	ня	v									NETH	detter 10014	53
	11	1	Carton Advisor Glinese	tantan ing kar Antanan kar	al Belte Gat	-	Barthan Barthan											-
*	1	v a	No.	-	- Annote - A	100	3 means	Californi Ratio	Annual Annual Strength	-	-	Pric Sales -	Dense:	12122	Per-2089-8	Tarrest Married	-	
	# 15	10	Pagenet (	25523	AP-0104 -	8.204	ANDIATOMOS	Make	129.99	2010	Peters Pressing	Tradation .	100	29.94	ADDRESS	ADAMOD	Sales Date:	
	6 (	1.0	Pageant	HILK	1012030414	18.204	ANCINTIMEN	distant	816.00	410.00	Paning Pressing	Per-Industrial	100	40.10	ADDIVIDENT	ADAMOS.	Bailes Dider	
	6 5	2.C	Trape, rest	0143	1020204	10,000	ACCUTORE	-184.514	104.74	105.45	Paning Proceeding	No. Laborat	140	18.16	ACCOMPANENT	ACLANTCO	mane .	

Figure: The Increase Authorized Amount Before Capture check box

With this check box selected, when a user selects a payment and clicks **Process** or **Process All** on the form toolbar, the system performs the following actions for each processed payment:

- 1. Checks whether the authorized amount can be increased for the payment. If the amount cannot be increased, the system captures the existing amount.
- 2. If the authorized amount can be increased, does the following:
  - a. Checks whether the payment has an available balance and displays an error message if the balance is greater than 0.00.
  - b. Checks whether the payment applied to the sales invoice still has an amount applied to the related sales order. If it does, the system displays an error message.
  - c. Sends an API request increasing the authorized amount for the payment and updates the payments and their application details upon successful authorization.
  - d. Sends an API request for capturing the payment.

If the API request for increasing the amount returns an error, the system does not capture the amount. It creates a record for each problem payment and displays the error message received from the processing

center. The user can then try to capture the payment with the **Increase Authorized Amount Before Capture** check box selected again or clear this check box to capture the current amount.

#### **Changes to the Payments and Applications Form**

On the *Payments and Applications* (AR302000) form, if a user clicks **Validate Card Payment** on the More menu, the system does the following:

- 1. Verifies the transaction amount by comparing the credit card transaction amount and the payment amount in Acumatica ERP
- 2. If the transaction amount was increased, updates the payment amount and the payment application amount, if possible, in Acumatica ERP

The increased payment amount remains unapplied if either of the following conditions is met:

- The system cannot determine from which application the amount was increased.
- This sales order or sales invoice does not have an unpaid balance.

### **Additional Information**

For more details about increasing the authorized amount in sales orders, see *Sales with Payments and Prepayments: Increasing of Authorized Amount*.

# **Finance: Payment Receipts for Released Transactions**

In previous versions of Acumatica ERP, after a payment was processed in the system, merchants could not issue the proof of purchase to their customers.

Starting in Acumatica ERP 2025 R1, merchants can generate payment receipts for released transactions. On the *Payments and Applications* (AR302000) and *Cash Sales* (AR304000) forms, a user can send an email with a payment receipt or print the payment receipt. This functionality can be used if the following conditions are met:

- The payment is created with the Credit Card, POS, or EFT payment method, and is captured and released
- The payment is created with the Cash, Check, or Direct Deposit payment method, and is released

The PDF attachment in the generated email includes the payment details and cash sale details. This PDF report can also be printed.

The following sections describe the changes to the UI and document processing to support this functionality.

#### **Changes to the Payment Methods Form**

On the *Payment Methods* (CA204000) form, the **Send Payment Receipts Automatically** check box has been added to the **Settings for Use in AR** tab, as shown in the following screenshot.



Figure: The Send Payment Receipts Automatically check box

By default, this check box is cleared. If this check box is selected, payment receipts for the specified payment method will be sent automatically from the *Payments and Applications* (AR302000) and *Cash Sales* (AR304000) forms. Regardless of the state of this check box, users will also be able to manually send payment receipts from these forms.

#### **Changes to the Accounts Receivable Preferences Form**

On the *Accounts Receivable Preferences* (AR101000) form, the new **Pay Receipt** mailing ID has been added to the table on the **Mailing and Printing** tab, as shown in the following screenshot.

	Accounts	Receivable Pre	ferences				D NOTES	FILES	CUSTOMZATION	TOOLS .
	- n									
	GENERAL	PRICING APP	PROVAL	DURNING	MAILING &	PRINTING				
8	Andrault Science			-						
	0 +	× H 🛛								
-	Active	*Matting ID	Branch	Defeat Error	Account.	Report	Email Template	Format	Hecipieritä	
5	Ø	CCEXPIRENOTE					COARDEXPIRATION	Honi	Add Recipi	ierts (
	8	DUNNINGLETTER				AR 55 10:00		POF	Add Recip	iente
	2	INVOICE				AR 64 12 00		POF	Add Recip	ients
	12	INVOICE PRY LINK					Invoice, Payment, Link	Hand	Add Recip	ients .
	8	PRY RECEIPT				AR 64 30:00	AR Payment Receipt	POF	Add Recip	ants .
	2	STATEMENT				AR 64 15:00		POF	Add Recip	ients
	2	STATEMENTMC				AR 64 20 00		POF	Add Recip	eth .
									ir c	2. 21
	Melault Recip	ients								
	0 +	XHM								
	Active C	oniact Type	Contact (D		Far	nat A	ad To			
э	8 1	Dilling			19	nt (	26			

#### Figure: The Pay Receipt mailing on the Mailing and Printing tab

This row in the table defines the mapping between the mailing and the email template. The mailing is active by default. If the organization needs to change or update this mapping, a system administrator can do it on the *Customer Classes* (AR201000) or *Customers* (AR303000) form.

#### **Changes to the Payments and Applications Form**

On the More menu of the *Payments and Applications* (AR302000) form, the **Printing and Emailing** section with the following commands has been added:

- **Print Payment Receipt** (see Item 1 in the screenshot below). When a user clicks this command, the system opens the payment receipt on the *Payment Receipt* (AR643000) form where the user can print it.
- Email Payment Receipt (Item 2). When a user clicks this command, the system generates an email message to the customer's email address. This address is specified in the Account Email box on the General tab of the *Customers* (AR303000) form. The user can review the generated email by clicking Activities on the title bar of the form.

Payment 005306 - Ata Ace ← □ = -0 + □ □ - K - + H - Vox □	H	Плотев ислогия	N FILES CURTOMONICON FOOLS -
Type         Payment         Continues         AACUSTONESE - Alla Aus           Nationaria Mile         285308         20         Location         AMAIL Trimery Location           Status         Ossel         2         Location         AMAIL Trimery Location           Application Date         To1520204         Cartiflactum         CARCE - Owait           Application Date         To1520204         Cartiflactum           Application File         To152024         Cartiflactum           Application File         To152024         Cartiflactum           Application File         To152024         Cartiflactum	Precessing	Connections Used Printing and Emailing Print: Payment Receipt Drust Payment Receipt	
December 10-0000 - 4000 FEEDER APPLICATION FEEDER TRANSPORT	Card Processing	Inguries Californi (Seala Roports AR Register (Sealad	Annual Part Line Provide Second Inst

Figure: New commands on the More menu of the Payments and Applications form

Payment receipts can be printed and emailed for all of the following document types: *Payment, Prepayment, Refund, Voided Payment, and Voided Refund.* 

These commands become available in either of the following cases:

- On the *Payment Methods* (CA204000) form, the Integrated Processing check box on the Settings for Use in AR tab is selected, the Means of Payment is set to *Credit Card*, *POS Terminal*, or *EFT*, and the payment has been successfully captured and released
- On the *Payment Methods* form, the **Integrated Processing** check box is cleared, the **Means of Payment** is set to *Check*, *Cash*, or *Direct Deposit*, and the payment has been successfully released

On the **Financial** tab of the *Payments and Applications* form, the **Print and Email Options** section has been added, as shown in the following screenshot.

Payment 005	306 - Alt	a Ace	ť.						D	NOTE	15	ACTIVIT	NES (1)	nu	5	custo	MIZAT	non	100	LS •
• D D	0	+		0	÷	ĸ	<	>	ы	W	DID	- M								
Type:	Payment			Custo	ne:		AACUS	TOME	R - Alla	Ace			1	Payme	nt.Aco		1	672.00	0	
Reference Nor:	005306	p		Locat	on		MAIN -	Primary	Locat	tion				Applied	i to Be	c		0.00		
Status	Closed			Paym	ent M	10	CHECK	- Chec						Appled	t to Or	đ		0.00		
Application Date	11/13/202	4		Cardi	Acces	nt								Availab	le Bal			0.00		
Application Pa_	11-2224			Cash	Acces	et.	10200 -	Comp	any Ch	ecking	g Acce	ount		Wite-C	M Acro	i		0.00		
Payment Ref.	PMT0514	7		Curre	ncy :		USD	1.0	0	٠	VE	N BASE		Financi	e Char	-		0.00		
														Deduct	ed Ch	é		0.00		
DOCUMENTS T	0 APPLY	541	ES O	ROERS	2	APP	ICATIO	v HISTO	жү.	70	UNC	AL.	APPR	WALS	0	AROES	5			
DOCUMENTS T	0 APPLY	541	ES O	ROERS	2	APP	ICATIO	v HISTO	жү.	70	UNC	AL.	APPR	WALS	0	AROES	5			
	0 APPLY	SAL	25 0	RDERS	2	APP	ICATION	V HISTO PAYME	NT IN	FORM		N	APPR	WAL5	CF	ARGE	5			
DOCUMENTS T	O APPLY	SAL ARD14	25 O	RDER	2	APP	ICATIO	e Histo PAYME Paym	NT IN	FORM		N	APPR:	WALS	C	IARIOE:	5			
DOCUMENTS T	O APPLY	SAL ARB14 PROD	25 0	RDER:	ducts	APP:		PAYME Paym Paym Paym	NT IN NT IN Net De	FORM		N	APPR: 1/2024 1/24	WALS	C	AROEI	5			
DOCUMENTS TO LINK TO GL Batch Nbr. Branch AR Account	O APPLY	540 AR014 PROD 11000	ES 0 761 WHO	ROERS LE - Pro	oducts	APP:		e Histo Paym Paym Paym	NT IN NT IN ant De	FORM Incol	MANC	N 11/12	APPR:	DVAL5	D	IARGE	5			
DOCUMENTS TO LINK TO GL Batch Nbr Branch AR Account AR Subaccount	O APPLY	5/41 AR014 PROD 11000 000-00	25 0 761 WHO • Acco	ROERS LE - Pro surts R stault	ducts	APP:		Paym Paym Paym Clear	DRY NT IN west Da west Pa	FU FORM the tried	MANC	N	AP990; 12924 124 ared	WAL5	C	WROET	8			
DOCUMENTS TO LINK TO GL Butch Nbr. Branch AR Account AR Subaccount Project	O APPLY	5/40 AR014 PROD 11000 000-00 X - No	25 0 761 WHO - Acco 0 - De p-Proj	RDERS LE - Pro sunts R rfault act Cod	schucts ecelva	AU191		Paym Paym Paym Clear	NT IN NT IN out Do out Po	FU FORM HIS O	MATIO	N 11/12 11-20 C Bar	APSTR 1/2524 1/24 ared ch Dap	WALS esit	C	IARIOE				
DOCUMENTS TO LINC TO GL Butch Nor Branch AR Subaccount Project Project Task	O APPLY	5/42 AR914 PROD 11000 000-00 X - No	25 0 761 WHO - Acco 0 - De n-Proj	ILE - Pro Aurits R effectit and Cod	sducts eceiva	Who	ICATIO	PAYNE Payn Payn Clear	DRY NT IN west De west Pe	FORM	MANC	N 11/10 11-20 Ch	APPR: 12024 124 ared ich Dap	ovAL5	0	IARGE !	5			
DOCUMENTS TO LINK TO GL Butch Nas Branch AR Account AR Subaccount Project Project Task Original Docum	OAPPLY	5/41 AR014 PROD 11000 000-00 X - No	15 0 161 WHOI - Acco 0 - De n-Proj	ROERS LE - Pro surts R elect Cod	ecelva le	APP:		Paym Paym Clear Babb	Dependent	FORM FORM His Hod		N 11-23 0 De	APPIc 1/2024 ared ch Dap pesiked	ovAL5	0	NARGE				
DOCUMENTS TO LINK TO OL Batch Nbr. Branch AR Subaccount Project Project Task Original Docum PRINT AND EMA	ent	5/42 AR014 PROD 11000 500-00 X - Ner	ES 0 1761 WHO - Acco 0 - De n-Proj	RDER LE - Pro sunts R risult act Cod	oducts ecelva	APPT s Who		Payn Payn Payn Clear Batch	Date:	Fit Forks		N 11171 11-21 Ch	APPR 12924 124 end ch Dag	ovacs	C	SARIOE:				
DOCUMENTS TO LINK TO GL Batch Nbr Branch AR Subaccount Project Project Task: Original Docum PRINT AND EMA E Proted		540 AR914 PROD 11000 000-00 X - No S	ES 0 761 WHO - Acco 0 - De n-Proj	RDERS LE - Pro survis R efectit act Cod	oducts eceiva	APPS Who able		Paym Paym Clear Batch Batch	DRY NT IN west Du west Pu Date	FU FORM the rited		N 11/17 11-28 Cla	APPN: 12024 ared ch Dap	out	0	ARGE	5			

#### Figure: The Print and Email Options section on the Financial tab

This section contains the following check boxes:

- **Printed**: Read-only. This check box indicates, if selected, that the payment receipt has been printed. By default, this check box is cleared.
- **Emailed**: Read-only. This check box indicates, if selected, that the payment receipt has been emailed. By default, this check box is cleared.
- **Don't Print**: Read-only. This check box is selected by default.
- **Don't Email**: This check box is selected by default. The default state of this check box depends on the state of the **Send Payment Receipts Automatically** check box (**Settings for Use in AR** tab) on the *Payment Methods* (CA204000) form. If the **Send Payment Receipts Automatically** is selected, this check box is cleared. A user can change the state of this check box before the payment opened on the *Payments and Applications* form is captured.

On the **Card Processing** tab of the *Payments and Applications* form, the **Card Number** column has been added to the table, as shown in the following screenshot.

Prepayment 0	005307 - Wid	get Credit Card					Divortes 1	CINITES (S.	ES CUETOMONION	10068 +
• = =	n +	0 - K	< >	H VOID						
ture	Prepagne -	Cattern.	WEIGETCC W	wheel Credit Card	1 month	5.105.00				
Reference Net	696367 P	Lassier	MAN Primary	Location	Appind to 1	0.00 (0.00				
Sets.	ripin .	Paprint Math	ADJANCE-D	edt Cerd via Acometica I	Applied to	0.00 0.00				
+ Application Deter	11/142024 []	Card-Account .	Water state and	1111	Available 3	04. 5.185.00				
+ Application Par.	11.3304 .JP	Processing 32	Captred		Wite-CRA	0.00				
Payment Fed	Tels2MonTE	CaseAssant	10250 - Company	y Merchant Account	Vinena Ch	larg. 5.00				
		Centres	USD 1.00	- VIEW DADE	Desine	0.00				
		Description								
DOCLMENTS I	DAPPLY - DA	LES CALERA AN	Concernance	er syancia, a	miliais (		Dimeter .			
O H 8	19. L									
B. San The	s. (netw 7	ion, Types 1	tan. Batya	Ten. Expre.0x Amount (Rel)	Referenced Tran Mar	Card Number	Prov. Danter Star.	Proc Certar Auto Alte	Proj. Cardin Patipan	a Passar
<ol> <li>201. ACI</li> </ol>	INVIENT A	where and Cap.	Approved	5,791.0000		Visa ten sen sen syrr	Tels2843w2911	#2543f	Approad	

Figure: The Card Number column on the Card Processing tab

In this column, the system displays the last four digits of a masked credit card number, which was used to make a payment if the customer payment method was not saved. These last four digits are stored in the system and are displayed on the *Payments and Applications* (AR302000) and *Cash Sales* (AR304000) form, if the payment is captured with the *Credit Card* or *POS Terminal* payment method.

### Changes to the Invoice/Memo Form

On the document printed on the *Invoice/Memo* (AR641000) form, the *Payment Details* section has been added to the bottom of the form, as shown in the following screenshot.

	manting		Ca	sh Sale	
Products Wholesale 11235 SE 6th St. Suite 140 Bellevue, WA, 98004 Phone: 206-555-1212 Web. www.reprintmentor	The Cloud ERP		Refe Date Due I Curst	nence No.: Date: somer ID: ency:	002142 07-Feb-2013 09-Mar-2013 ABARTENDE USD
RULTO:	***		SHIP TO:		
USA Bartending School 201 Lower Notch Rd Chicago IL 60606 United States of America Attn. Accounts Receivable			USA Bartending School 201 Lower Notch Rd Little Falls NJ 07424 United States of America Attn: Receiving		
CUSTOMED DEE MOD	TEDME		CONTACT		
CUSIOMER REF. NDR.	TERMIS		CONTACT		
	10 Dava		School of the second		
NO. ITEM 1 AACOMPUT01: Ace	30 Days	QTY. UOM 5.00 EA	UNIT PRICE 500.00	DISC. 0%	EXTENDED PRICE 2,500.00
NO. ITEM 1 AACOMPUT01:Ace	30 Days	QTY. UOM 5.00 EA	UNIT PRICE 500.00	DISC. 0%	EXTENDED PRICE 2,500.00
NO. ITEM 1 AACOMPUT01: Ace	30 Days	QTY. UOM 5.00 EA	Steve Church UNIT PRICE 500.00	DISC. 0% Sales Total: Less Discount: Tax Total: Total (USD): Cash Discount:	EXTENDED PRICE 2,500.00 2,500.00 0.00 2,500.00 0.00 2,500.00 0.00
NO. ITEM 1 AACOMPUT01: Ace NOTE PAYMENT DETAILS:	30 Days	QTY. UOM 5.00 EA	Steve Church UNIT PRICE 500.00	DISC. 0% Sales Total: Less Discount: Tax Total: Total (USD): Cash Discount:	EXTENDED PRICE 2,500.00 2,500.00 0.00 0,00 2,500.00 0.00 0,00
NO. ITEM 1 AACOMPUT01: Ace NOTE: PAYMENT DETAILS: Type:	30 Days	QTY. UOM 5.00 EA	Cash Sale	DISC. 0% Sales Total: Less Discount: Tax Total: Total (USD): Cash Discount:	EXTENDED PRICE 2,500.00 2,500.00 0.00 0,00 2,500.00 0.00
NO. ITEM 1 AACOMPUT01: Ace NOTE: PAYMENT DETAILS: Type: Transaction Date:	30 Days	QTY. UOM 5.00 EA	Cash Sale 31-Dec-23	DISC. 0% Sales Total: Less Discount: Tax Total: Total (USD): Cash Discount:	EXTENDED PRICE 2,500.00 2,500.00 0.00 0,00 2,500.00 0.00
NO. ITEM 1 AACOMPUT01: Ace NOTE: PAYMENT DETAILS: Type: Transaction Date: Payment Method:	30 Days	QTY. UOM 5.00 EA	Cash Sale 31-Dec-23 Cash/Check	DISC. 0% Sales Total: Less Discount: Tax Total: Total (USD): Cash Discount:	EXTENDED PRICE 2,500.00 2,500.00 0.00 0,00 2,500.00 0.00

#### Figure: The updated Invoice/Memo form

This updated form is opened by the system when a user clicks **Print** on the More menu of the *Cash Sales* (AR304000) form.

#### **Changes to the Print Invoices and Memos Form**

The *Print Invoices and Memos (AR508000)* form has been modified to support mass-processing of payment receipts and to schedule automation of payment receipts. The following UI changes have been added to the form:

- The form title has been changed from *Print Invoices and Memos* to *Print/Email AR Documents* (Item 1 in the screenshot below).
- To the drop-down list in the **Action** box, the following options have been added: *Print Invoices*, *Email Invoices*, and *Email Payment Receipts* (Item 2).
- The **Payment Method** column (Item 3) has been added to the table. This column displays the payment method used for creating the payment. (For invoices, this column is empty.)
| PrintErro | AR Docum    | orta 이        |          |          |            |          |                  |                             |             |             |            |          | 0.675  | adjation | toour - |
|-----------|-------------|---------------|----------|----------|------------|----------|------------------|-----------------------------|-------------|-------------|------------|----------|--------|----------|---------|
| 0 0       | recent (    | INCOMENTS ALL | 0. 1     |          |            |          |                  |                             |             |             |            |          |        |          | 1       |
| -         | Indian      | and Provide   | -        |          | -          |          |                  |                             |             |             |            |          |        |          |         |
| hanged    | -48-821-    | 2             | 1 CW     | . Inches | 11.00      |          | -                |                             |             |             |            |          |        |          |         |
| mapre     | Mart or Do  | tot Rouge     | 1246     | father.  | 107102     | 141      |                  |                             |             |             |            |          |        |          |         |
|           | English     | -             | 0        |          |            |          |                  |                             |             |             |            |          | 1      |          |         |
|           | " Vessillar |               |          |          | -          | There    | -                |                             |             | Depart.     | Trial Mar. | Birthoat | 1000   | 100      | 1       |
| + + D C   | PROPERTY    | Parment       | 1000     | Chevel   | 101004     | 41-015   | 1DAUR            | Agrice Food                 | 10.00       | 141, 191    |            | DHIDK    | 1000   | 10.      |         |
|           | mecowine    | Farmet        | 1000     | Ownet    | attention. | -10-001  | ADARTIME         | USA Bartenbig 3             | 22,004      | 4.00 (1995) |            | OWN      | 100    | 10.0     |         |
| 9.0 0     | PRODUCINE   | Parme         | -        | Cloud    | 1000013    | 10,011   | <b>ELTERATOR</b> | The branding                | 1.10.00     | 6.00 1002   |            | CHECK    | 1.11   | 10       |         |
| 6.0.0     | recovered   | Payment       | 100.011  | Deed.    | binges.    | 15210    | 100310000        | Add dealers her             | 10.074.00   | 848, 1000   |            | CHECK.   | 1111   |          |         |
| • 0 0     | monent      | Payment       | 80534    | Genet    | 344-2818   | 10.010   | n.carue          | Electronic importants       | 04,296,10   | 4.00 (000)  |            | CHEOK.   | 1.00   | - 15     |         |
| \$ 2 1    | monecul     | Farmer        | 10010    | Clease   | 2003011    | 10.0111  | BLOWNER          | Deceme Designs              | 40,000,000  | 68.98       |            | -CHRICK  | 1.12.1 |          |         |
| 9.0.0     | INCOMPOSE.  | Payment       | 2203.21  | Oward    | 305,02118  | 0.011    | FDADN            | Aprile Food                 | 85,476.04   | 6.00 UND    |            | DHEDK    | (A)    | - 10     |         |
| 6.0.0     | HORHAL      | Payment       | anarz.   | Good     | NUMBER.    | 63H      | PERCENT          | Coulder Past                | 28.959.00   | 8.65 1000   |            | DHECK    | 1.00   | 1.00     |         |
| 8.0.0     | PROPERTY    | Payment       | 1000     | Christ   | 219/2015   | 0.01     | FIDOWR.          | Grit Presser Strift         | ACHG.IR     | 1.0 101     |            | CHECK    |        | - 14     |         |
| 8.0       | moment      | Fairnet .     | 1212.0   | Guad     | SQUEEKS.   | 15,015   | REGORARE         | Excerneto Inte              | 187 (081 3) | 8.00 (000)  |            | OPERA    | 1.6    | - 20     |         |
| 8.0.0     | PRODUCT     | Parmet        | 12134    | Closed   | page and a | 0.00     | MCM/PH/F         | treasted bases be           | 46,917,927  | 6.05 (1982) |            | DHECK    | 1.0    | - 10     |         |
| \$ 0.0    | PROPERTY    | Parriet       | \$27687  | Cheart   | 422711     | 98,2215  | ARAPTONOS .      | UM Annual I                 | 4.101.04    | 6.00 1000   |            | OHICK    | 1.01   |          |         |
| 60.0      | received    | Parmet        | 325542   | tited    | 410010     | 04-2010  | NOSAGRME         | Second International Second | 101,003,04  | 6.00 1000   |            | CHECK    | 100    |          |         |
| 8.0.0     | PRODUCED    | Factori I     | 889043   | Greet    | 4103111    | \$4,2715 | HEODETHINY       | Widgel Connaction           | 1.000.00    | 636 100     |            | CHECK    | 1.00   | - 10     |         |
| 9.0.0     | moment      | Farmet        | 1000     | Clinet   | 400/0115   | 14-2213  | 10006703         | TREAT CHARGE IN             | 1.000.000   | 818 1000    |            | 1054     | C      | . 10     |         |
| 9 D (     | PRODUMOUS   | Parrat        | 220345   | Gand     | 4760843    | 44-3213  | HIDGETED         | Wilson Grant Gard           | 2,500.00    | 6.00 1000   |            | 195A     | 20     | 10       |         |
| 8.0.0     | Noteetal    | Parent        | BALLAN . | Deed     | 6303015    | 34.3113  | WEDGETICS        | Weiget Credit Card          | 3.36.86     | 4.05 (105)  |            | witte    | · 12 · |          |         |

#### Figure: The UI changes on the Print/Email AR Documents form

The table on the form now displays documents of the following types: Cash Sale, Cash Return, Payment, Prepayment, Voided Payment, Refund, and Voided Refund.

The functionality of the **Show All** check box has been changed as follows:

- If this check box is cleared, the system displays the documents that match the selection criteria and have the **Don't Email** and **Emailed** check boxes cleared on the **Financial** tab of the *Payments and Applications* (AR302000), *Invoices and Memos* (AR301000), or *Cash Sales* (AR304000) form.
- If this check box is selected, all the documents are available for processing regardless of the specified selection criteria.

#### **Scheduling of Automatic Receipts**

To schedule the automation of payment receipts, an administrative user should perform the following instructions:

- On the *Payment Methods* (CA204000) form, select the **Send Payment Receipts Automatically** check box for the needed payment methods.
- 2. On the *Print/Email AR Documents* (AR508000) form, create a schedule. Once the schedule is created, payment receipts will be automatically sent to customers.

#### **The Payment Receipt Report**

The new *Payment Receipt* (AR643000) report has been added to the system. The system uses this form to print payment receipts from the *Payments and Applications* (AR302000) form. The printed form of the report is shown in the following screenshot.

	Payment Receipt	t
	Relevence Nbr.: Currency:	005306 USD
Payment 13-Nov-24 Cash/Check		
	Payment 13-Nov-24 CashiCheck	Payment Receipt Reference Nbr.: Currency: Payment 13-Non-24 Cade/Check

#### Figure: The new Payment Receipt report

The users with the following roles assigned to them will have access to this report: *Administrator*, *AcumaticaSupport*, *AR Admin*, *AR Clerk*, *SO Admin*, *AR Viewer*, and *Sales Manager*.

## **Additional Information**

For more information about payment receipts for cash sales and cash returns, see *Cash Sales and Cash Returns: Payment Receipts*.

For more information about payment receipts for invoice payments, see Invoice Payments: Payment Receipts.

For more information about receipts for prepayments, see Invoice Prepayments: Payment Receipts.

For more information about payment receipts for refunds, see Refunds: Payment Receipts.

# **Finance: Prepayments from Sales Order Payment Links**

In previous versions of Acumatica ERP, a payment received from a payment link for a sales order and sales invoice was created as a document with the *Payment* type. However, it is preferable to create a document for a sales order as a prepayment. (Prepayments are usually posted to a different AR account—Prepayment AR account.)

Starting in Acumatica ERP 2025 R1, a user can specify whether the system must create a document with the *Prepayment* type for payments received from payment links created for sales orders.

On the **Payment Links** tab of the *Processing Centers* (CA205000) form, the **Create from SO Payment Link** box has been added as shown in the following screenshot.



Figure: The Create from SO Payment Link box on the Processing Centers form

This box contains the following options:

- Payment (default): The system will create payments from payment links created for sales orders.
- *Prepayment*: The system will create prepayments from payment links created for sales orders.

This change affects payments that are created in the system when a user does one of the following:

- Clicks the Sync Payment Link button on the Payment Links tab of the Sales Orders (SO301000) form
- Selects the *Sync Payment Link* option in the **Action** box on the *Process Payment Links* (AR513500) form, selects the needed row in the table and clicks **Process** on the form toolbar
- Syncs a payment link by using a webhook

# **Finance: Recording of Finance Charges for Refunds**

In previous versions of Acumatica ERP, if a user was entering a refund on the *Payments and Applications* (AR302000) form, they could not add finance charges to the refund on the **Charges** tab.

Starting in Acumatica ERP 2025 R1, users can add charges to refunds and voided refunds on the *Payments and Applications* form. The charge amount can be either a positive value or a negative value.

## **Entry of Charges for a Refund**

On the **Charges** tab of the *Payments and Applications* (AR302000) form, a user can add finance charges to a refund, as shown in the following screenshot.

Refund 005311 - Alta	Ace		C NOTES ACT	WITES FLES	CUSTOMIZATION TOOLS .
* 0 0 0	+ 8 0 ~ K	< > > > =	ELEASE ····		
Type: Refund	- • Customer	AACUSTOMER - Alta Ace	21	Payment Area	200.00
Reference Nbr.: 005311	P + Location	MAIN - Primary Location	Q.	Applied to Doc	0.00
Status Balance	d Payment Meth.	CHECK - Check	P	Applied to Ord	0.00
+ Application Date: 1526/20	CardiAccount			Acallable Eala	200.00
+ Application Pe. 11-2024	p + Cash Account	10200 - Company Checkle	ng Account . P	Ville-Of Ann	0.00
+ Payment Rul PMT051	51 Currency	USD 1.00 +	VEW BASE	Finance Charg	8.00
				Deducted Cita	0.00
	Description	Credit memo refund			
DOCUMENTS TO APPLY	SALES ORDERS AP	PLICATION HISTORY	NANCIAL APPRO		0
0 + × H	8				
B *Entry Type Descr	tation *on	NetAccount Coffeet Bub	eccoard 1	Aronant "Propert	*Project Tank
BANKFEET Bank	Fee 1 611	00-000 00		-17.00 X	
BANKFEE2 Bank	Fee 2 615	99 999-000		25.00 X	

Figure: Finance charges added to a refund

When the refund is released, the positive amount of the charge will credit the cash account, and the negative amount of the charge will debit the cash account. The posted GL transaction is shown in the following screenshot.

AR AR014776	- Credit memo	refund						D round	ACTIVITIES	FURE CUETOMOSTIC	r 10068 •
0 0 0	+ = 0	) = ж с	э н								
Module Datch Handler Data Norchshat Databler Million av	All -	Bankle Leiger Carvenir	PRODUCTS For ACTION Advants UNIT 100 Auto Revision Stag Tax Annual V	darts Wadraats Sgar - UKWY BA - Re-examp Con Wilsetun	Tan Grig B Saint T V Could	et turior ne loc	Nama 2010 2750				
0 + 1	× vex.s	NACE DOCUMENT	AND ADDRESS		H 8 1						
B b D "bank	* decised	descination.		*Laterial and	Cal Borney	Tanaime.	Darris 104	Quint Annual	Oell	Transaction Description	No.
F & D PRODU	400LE 10200	Corgany Che	Dir-teachgrid	000-000	886211	11092004	8.66	1.01	201.00	Credit ment related	
B D PRODA	BIOLE 11008	Accounts Place	shallor -	888-888	305211	110010004	8.00	205.08	1.00	Credt memoryland	
4 D PHOLM	NO.E 10288	Corpany Cire	CH: InnoiAgeith	101.005	006311	110303044	4.00	17.00	8.00	Sed For 1	D
& D PRODU	100E EHB	Dark Service (	Durges	101-018	110211	11/25/2524	1.00	6.00	4.00		
6 D PRODU	MOLE 10288	Conpany Che	CH-ImacoA print	896-598	865311	11252104	6.65	8.08	25.00	Bank Fee 2	U -

Figure: The GL transaction posted for the refund with charges

# Entry of Charges for a Voided Refund

When a user voids a refund on the *Payments and Applications* (AR302000) form, the system creates a document with the *Voided Refund* type. On the **Charges** tab of the form, the system automatically adds charges with the opposite sign of the values in the original refund. A voided refund with charges is shown in the following screenshot.

1	voided Refur	d 005311	- Alta A	ce			a ACTIVITIES	FILES	CUSTOMIZATION	TOOLS .
•	6 D D	0	+ 8	0 -	K K	> > RELEASE	***			
	Тура	Voided Re	141	Customer	AACUSTO	MER - Alta Ace	J Payme	nt Amo.	-200.00	^
	Reference Nbr.	005311	,p	Location	MAIN - Pr	imary Location	Applie	5 to Doc	0.00	
	Statut	Balanced		Payment M	th CHECK -	Check	Applie	t to Ord	0.00	
	Application Date	11/22/2624	E3	Card/Accou	nt		Availab	le Bala	-200.00	
	Application Pe	11-2024	P	Cash Accou	nt. 10200 - C	ompany Checking Account	Wide-0	Off Ame.	0.00	
	Payment Ref.	PMT05151		Currency	USD	1.00 • VEW BA	SE Financ	e Charg	-8.00	
							Deduc	ted Cha	0.00	
				Description	Credit me	mo refund				
	DOCUMENTS T	O APPLY	SALES	ORDERS	APPLICATION H	ISTORY FINANCIAL	APPROVALS	CHARG	ES	
	0 + ×	н	8							
-	*Entry Type	Descript	int .		Offset Account	*Offset Subaccount	Amount	*Project	*Project Tax	8
2	BANKFEE1	Bank Fe	e 1 .		61100	000-000	17.00	x		
	BANKFEE2	Bank Fe	e 2		61100	000-000	-25.00	x		

Figure: A voided refund with finance charges

# Finance: Support of the BAI2 Format by Bank Feeds

In previous versions, Acumatica ERP did not support the Bank Administration Institute Version 2 (BAI2) format of bank statements. The Balance and Transaction Reporting Standard (BTRS) improves upon the BAI2 format. The BAI2 and BTRS formats are banking industry standards for communicating bank statements electronically.

Starting in Acumatica ERP 2025 R1, the BAI2 and BTRS file formats are supported by bank feeds. When a user retrieves bank feed transactions, the system detects a new file with transactions exported to it by a bank and creates bank transactions for the specified cash account. If a corporate card and employee are specified in the bank feed settings, the system creates expense receipts for them.

This functionality is available in the system if the *Bank Feed Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form.

The following sections describe the changes to the UI and document processing to support this file format.

#### **Changes to the Bank Feeds Form**

On the Bank Feeds (CA205500) form, the following UI changes have been made:

• In the **File Format** box, the *BAI2* (*Bank Administration Institute*) option has been added (Item 1 in the screenshot below). If this option is selected, the system checks for files with .bai, .bai2, .btrs, or .txt extension in the specified SFTP folder.

If the user selects this option, the boxes in the **Source File** section are not shown on the form, except for **Data Provider** (Item 2).

- In the **Source File** section, the system inserts the *Bank Feed BAl2* data provider (Item 3), which it created when the user clicked **Set Up Data Provider**. This type of data provider has been added on the *Data Providers* (SM206015) form and can parse files with BAI, BAI2, and BTRS formats.
- With the *Bank Feed BAl2* data provider specified, the system automatically fills in the table in the **Mapping Rules** section (Item 4) with the mapping rules for required fields, which cannot be edited. However, users can set up mapping for optional fields.

ank Fe	eeds									D	NOTES	FILE	ES	CUSTOMIZATION	TOOLS
6	63	0	+	Ē	0	•	K	<	>	×	ACTI	VATE	•	÷	
Bank	k Feed	ID:	BAJ	2				Q	* Fin	ancial h	nstitution	Bani	k1		
State	us		Set	up Req	uired							Cr	eate	Expense Receipts	
Bank	k Feed	Туре:	File					Ψ.							
Impo	ort Star	t Date.	1/1/	2024											
Desc	cription	6	BAI	2											
CONN	естю	ON TO S	OURC	EFILE	-					_					
URL				sftp.//	10.35	32.23	33/F1								
File	Format	t.		BAI2	(Bank	Adm	inistrat	on Insti	tute)	- 0					
Logi	n:			admir	1										
Pass	sword.			++++++++											
SSH	Privat	e Key								Q,					
				TE	STC	DNNE	CTION	4				_			
SOUR	CE FIL	LE		-						_					
				SET	UP DA	TA P	ROVID	ER			-	6	2		
Data	Provid	der.		Bank	Feed	BAI2	8			0	3				
MAPP	ING R	ULES _									-	-			
Ċ	Н	X													
8.0	0	Active	Targ	et Field			500	rce Fiel	id or Val	ue					
	D		Bar	nk Acco	unt Na	ame	Cu	stomer	Account	Numbe	e :				
> 0	-								inner M	and an		-	e.		
> 0	0	Ø	Ext	Tran. I	D		Ba	nk Refe	rence N	umber					
> 6 6 6		2	Ext	n. Date	D		As	of-date	rence N	umber		4			
> 0		2	Ext Tra Tra	n. Date	n Amo	unt	As An	of-date ount	rence N	umber		4			

Figure: UI changes on the Bank Feeds form

The *Bank Reference Number* source field is optional in the BAI2 format, but is required in Acumatica ERP because it is mapped to the transaction ID. The transaction ID is used by the system to identify transactions and avoid duplicate records.

## Setup of BAI2 Transaction Retrieval

To set up the functionality of retrieving BAI2 transactions from a bank feed, an administrative user does the following:

1. On the *Bank Feeds* (CA205500) form, creates a bank feed, selecting *BAI2* (*Bank Administration Institute*) as the **File Format** and entering credentials to the SFTP folder where the bank stores BAI2 files.

- 2. Clicks **Set Up Data Provider**. The system creates a new data provider for BAI2 files and inserts it in the **Data Provider** box.
- 3. Reviews the mapping rules populated by the system and changes the mapping for optional fields, if needed.
- 4. On the **Cash Accounts** tab of the *Bank Feeds* form, specifies the needed bank accounts and their corresponding cash accounts.
- 5. Activates the bank feed by clicking **Activate** on the form toolbar. This changes the bank feed's status to *Active*. Now a user can start retrieving bank transactions on the *Retrieve Bank Feed Transactions* (CA507500) form.

# **Finance: Other Improvements**

In Acumatica ERP 2025 R1, multiple improvements to financial management processes and the UI have been introduced, as described below.

# **Refined Validations for a Custom Due Date Type**

In previous versions of Acumatica ERP, credit terms with the *Custom* due date type could be created without the dates covering all the dates of a month. As a result, issues occurred when the system tried to insert the default due date in transactions.

In Acumatica ERP 2025 R1, on the *Credit Terms* (CS206500) form, the following refinements have been made to the validations that the system performs if *Custom* is selected in the **Due Date Type** box:

- The system now inserts 1 in the **Day From 1** box for **Due Day 1** (see Item 1 in the screenshot below) to ensure that the beginning of the month is covered. This setting is read-only.
- The value in the **Day To 1** box for **Due Day 1** must (Item 2) be less than *31*; otherwise, the system displays an error message. Also, the day in the **Day To 1** box must be later than or the same as the day specified in the **Day From 1** box. If this condition is not met, the system displays an error message.
- The **Day From 2** setting for **Due Day 2** (Item 3) is now read-only. Its value is one day later than the day in the **Day To 1** box.
- The system inserts 31 in the **Day To 2** box for **Due Day 2** (Item 4) to ensure that the end of the month is covered. This setting is read-only. The day in the **Day To 2** box must be later than or the same as the day specified in the **Day From 2** box. If this condition is not met, the system displays an error message.

CUSTOM - CL	stom		D	NOTES	FLES	CUSTOMIZATIO	N TOOLS
← 10 10	0 + 8 D × K	x	ы				
GENERAL SETTI	(05	-	SALES ORDER PREPAYN	IENT SET	TINGS _		-
+ Terres ID	CUSTOM	,p		C)Prep	tyment He	brice	
+ Description	Custom		Propayment Percent.		0.00		
Visible To:	AE	-	INSTALLMENTS SETTING	15			_
DUE DAY SETTIN	G5		Vistalizent Type:	Single			
Due Date Type:	Custom 👔	+	Number of Instalments	.0			
Due Day 1	3 Day From 1 Day To 1	3 2	Instalment Frequency	Weekly			
Due Day 2	15 Day From 4 Day To 2	31 🙆	Installment Mathod	Equal F	Parts		
CASH DISCOUNT	SETTINGS 0	_	Installments Schedule				
Discount Type	Fixed Number of Days	-	0 + ×				
Discount Day	0		n .	Dave		0	1000
Discount %	0.00		10	77.0		11.0	

Figure: The boxes with refined validations

## Validation of Acumatica Payments Imported from Shopify

In previous versions of Acumatica ERP, the processing of payments initiated in the Acumatica Payments processing center from Shopify was not supported on the Acumatica ERP side due to missing processing center IDs. (Acumatica ERP uses these IDs for interactions with the processing center when the system performs actions, such as capture, void, or refund.) These IDs were missing because the Acumatica Payments plug-in in Shopify could not save the Acumatica Payments IDs to the Shopify database.

Starting in 2025 R1 RC, Acumatica ERP will support the Acumatica Payments processing center in e-commerce systems that use their internal IDs in interactions with a processing center and do not keep the IDs assigned by

the processing center. Users will be able to import payments and refunds from these e-commerce systems into Acumatica ERP.

These payments and refunds must be validated after import. Users can initiate the validation for a particular document on the *Payments and Applications* (AR302000) form or for multiple documents on the *Validate Card Payments* (AR513000) form. The validation process can be scheduled.

#### Improvements on the Manage Credit Holds Form

In previous versions of Acumatica ERP, if *Credit Hold* was selected in the **Action** box on the *Manage Credit Holds* (AR523000) form and a user selected the **Show All** check box, nothing changed from what was previously shown in the table. If the *Remove Credit Hold* action was selected and the user selected the **Show All** check box, all available records with all statuses were added to the table. This behavior was confusing because with this check box selected, the system should ignore all selection criteria on the form. Also, if one of the dates was not specified in the **Start Date** or the **End Date** box, no records were listed in the table.

To fix these issues, the following changes have been introduced on the Manage Credit Holds form:

- The **Show All** check box has been removed from the Selection area.
- If the *Remove Credit Hold* option is selected in the **Action** box, the form's UI changes as follows:
  - The Start Date and End Date boxes in the Selection area become hidden.
  - The system displays only customers with the *Credit Hold* status.

The following screenshot illustrates the form with the *Remove Credit Hold* option selected.

Manage Credit H	folds				CUSTON	NZATION TOOLS .
ර 🗠 PROCE	SS PROCESSALL 🔿 🛩	HB	Υ.			1
Action:	Remove Credit Hold -					
Customer ID	Customer Name	Duriving Letter Date		Overdue Balance	Customer Balance	Customer Status
U VERACITYCE	Veracity Credit Consultants			0.00	7,000.00	Credit Hold

#### Figure: The form with Remove Credit Hold selected

- If the *Credit Hold* option is selected in the **Action** box, the form's UI changes as follows:
  - The Start Date and End Date boxes are empty by default.
  - If the start date is specified, the table shows only customers with the *Active* and *One-Time* statuses whose final dunning letter date is later than or the same as the start date.
  - If the end date is specified, the table shows only customers with the *Active* and *One-Time* statuses whose final dunning letter date is earlier than or the same as the end date.

The following screenshot illustrates the form with the *Credit Hold* option selected.

1	Aar	age Credit H	olds			CUSTON	NZATION TOOLS .
1	5	PROCE	SS PROCESSIALL O - H	X V			Q,
	-	tion	Credit Hold				
	54	et Date:	End Date:				
10	0	Customer ID	Customer Name	Donning Letter Data	Overdue Bielance	Customer Balance	Customer Status
2		ACTIVESTAE	Active Staffing Service	5/13/2025	7,000.00	7,050.00	Active
	Ċ.	ARTCAGES	Artcages	5/13/2025	15,000.00	15,050.00	Active
		BEAUTYSCH	New York International Beauty School Ltd	5/13/2025	366, 165.00	366,215.00	Active
		BIBIMBAB	Bibimbab Korean Restaurant	5/13/2025	70,806.40	70,856.40	Active
		ENRCONTRAC	BNR Contractors	5/13/2025	0.00	45.00	Active
		BRASSKEY	Brass Key Bar	5/13/2025	415,998.60	416,048.60	Active
		CASHCONNEC	Cash Connection	5/13/2025	4,530.00	4,580.00	Active
		CONSTPLAZA	Plaza Construction	5/13/2025	33,105.00	33,155.00	Active
		CRABTREE	Crabbree Kittle House Inn	5/13/2025	7,000.00	7,050.00	Active

Figure: The form with Credit Hold selected

#### **Prevention of Auto-Reopening a Payment Link**

In previous versions of Acumatica ERP, if a payment made by using a payment link was voided, the payment link became open again on the processing center's side and no notification was sent to the system. Consequently, the user could create a new payment link for this document, which could result in a duplicated payment.

To prevent the automatic reopening of a payment link, a new API parameter (auto-reopen) has been introduced for API requests for payment link creation and sync. This parameter will be set to false by the system for all created payment links. As a result, a payment link will remain closed on the processing center's side if the related transaction is voided, refunded, or unlinked.

#### Deprecated Support for the Authorize.Net Payment Plug-In

Starting in Acumatica ERP 2025 R1, the **Authorize** and **Authorize and Capture** commands on the More menu of accounts receivable forms will no longer be supported for credit card payments created through the Authorize.Net plug-in. As a result, users will no longer be able to create new transactions with Authorize.Net. The **Capture**, **Void**, **Refund**, and **Validate Card Payment** commands will remain available for existing payments with preliminarily authorized transactions. The **Record Card Payment**, **Record and Capture Preauthorization**, and **Import Settlement Batches** commands will also be available. Users will not be able to create new customer payment methods for Authorize.Net.

We encourage companies to take advantage of the Acumatica Payments plug-in, which provides greater functionality, better support, and competitive rates.

The client should contact its partner to learn more about making the transition to Acumatica Payments. If the company uses Acumatica ERP 2023 R2 or a later version, a system administrator can configure the Acumatica Payments plug-in without making any software changes. For more information about Acumatica Payments, see *Configuring and Using Acumatica Payments* and *To Configure Acumatica Payments*.

#### Cancellation or Correction of an Invoice with Externally Calculated Taxes

In previous versions of Acumatica ERP, an issue arose with canceling or correcting invoices whose taxes were calculated by external tax providers. When a user canceled or corrected such an invoice, the taxes in the created

credit memo could differ from those applied to the original invoice. This caused the credit memo to fail when being applied to the invoice and prevented the release of the correction invoice.

For example, the inconsistency between the original invoice and the credit memo could occur when an exemption certificate was added for a customer in the external tax provider account (such as Avalara or Vertex) after the invoice was created and released for this customer in Acumatica ERP. The user's attempt to correct the invoice failed due to the discrepancy in totals between the original taxed invoice and the tax-free credit memo. This prevented the correction invoice from being released, and an error was displayed.

In Acumatica ERP 2025 R1, the process for canceling or correcting invoices with taxes calculated by external providers has been optimized. When a user cancels or corrects an invoice, the system creates a credit memo with the same taxes and document totals as the original invoice. Thus, the credit memo can be applied to the invoice, and the correction invoice can be released.

# Integrations: Filtering in the Shop for Rates Dialog Box

In previous versions of Acumatica ERP, if a user updated the rates in the **Shop for Rates** dialog box on the *Sales Orders* (SO301000), *Shipments* (SO302000), or *Pick, Pack, and Ship* (SO302020) form, the list of carrier rates started with the rates that returned errors or had an amount of *0*.

Starting in Acumatica ERP 2025 R1, the Quick Filter and **Filter Settings** buttons have been added to the filtering area of the **Shop for Rates** dialog box. By default, the *Available Rates* quick filter (Item 1 in the following screenshot) is applied to the **Carrier Rates** table. With this quick filter applied, a user can have all the available rates at hand (Item 2). To see all the rates, the user can click the Quick Filter button and select *All Rates*.

Also, the **Filter Settings** button has been added to the filtering area dialog box (Item 3). By clicking this button, a user can open the **Filter Settings** dialog box and specify additional filtering conditions for the following properties: *Selected, Code, Description, Amount, Days in Transit,* and *Delivery Date*.

24	e.Pi	or Fla	dee .													-
1	-	1944	e	p1 340000	Personal Print	1. 27.24										
Cert	-	-												0		0
0				REPRESENTED AND	H 8								Available	faire .	+	7
	-		-	e anna an									Longe and	Darpine (	Delivery De	. 6
			460	EN1		16	effe fen	den live	npit:				10.00		+ Hold	
		£.,	110	00		. 0	151.204	10					698.27		1110304	
			100	DAVONU			198.044	ed .					229-14		110203	
			102	DIGROUND		- 14	ette line	entit .					682.74		110025	
Part	-															
0		÷.	×	ADTRED-RICKA	IN SAFTI	AR NEIGHT	H.									
	0	-		Bas Desirement	Salaria Disease	ingth	-	magin	11mm (100	1444	mage	and and	- tes	Tanina URA		1.1.0
1.8	0	in	100	implies		31.00	10.00	19.40	10	46	11.0000	01000	19346	1,101,000		
	0	- 100	DI-M	Nichari Sia		28.00	2046	0.98	08	40	8.1000	9-2008	1 760	1425.009		
																100

Figure: Filtering in the Shop for Rates dialog box

# Integrations: Multiple Access Tokens for Each External Application

When integrating Acumatica ERP with third-party services, administrators create external applications that connect Acumatica ERP and these services. To verify users, services often employ the OAuth authorization protocol, allowing these users to sign in on behalf of a specific account and receive an access token. This token is then used to request data that is available to the particular user. For certain services, such as Microsoft Exchange or Gmail, a separate access token must be specified for each user, ensuring that they can access only their own data.

In earlier versions of Acumatica ERP, each external application could only use a single access token. As a result, administrators had to create a separate external application for every third-party user, which created a significant burden for both users and administrators.

However, in Acumatica ERP 2025 R1, administrators can now create multi-token external applications—that is, applications having a single set of application parameters and multiple tokens associated with different users.

## **Changes to the External Applications Form**

On the *External Applications* (SM301000) form, the following changes have been made to support multiple-token OAuth 2.0 applications (see the screenshot below):

- The new OAuth 2.0 option is available in the **Type** box.
- The **Authorization Endpoint** and **Token Endpoint** boxes have been added. In these boxes, the administrator enters the URLs to send authorization and token requests, respectively. These boxes appear only when the *OAuth 2.0* type is selected.
- The **Authentication Token** section was replaced with the **Tokens** tab, which lists the access tokens obtained for the application.
- The Return URL box has been removed and replaced with the View Redirect URI toolbar button.
- The **Sign In** command on the More menu becomes disabled for multi-token applications. To sign into the third-party services, users now need to use the **Sign In** commands on the *User Profile* (SM203010) or *Email Accounts*(SM204002) form.

Application ID: 8   Type: OAuth 2.0   * Application Name: Gmail connector OAuth2   • Client ID: 116706595995-05vpm8milf6o7mpqte9nq!   • Client Secret	External Application	15	CUSTOMIZA	TION TOOLS
Application ID: 8   Type OAuth 2.0   * Application Name: Gmail connector OAuth 2   • Application Name: Gmail connector OAuth 2   • Client ID 116706595995-05vpm8mif6o7mpqte9ngt   • Client Secret • • • • • • • • • • • • • • • • • • •	© + 0		EW REDIRECT URI	
Type:       OAuth 2.0         * Application Name:       Gmail connector OAuth2         • Client ID       116706595995-05vpm8mif6o7mpqte9nqt         • Client Secret       ************************************	Application ID:	٩ ٩		
Application Name: Gmail connector OAuth2     Client ID 116706595995-05vpm8mif6o7mpqte9nq4     Client Secret      Authorization Endpoint: https://accounts.google.com/o/oauth2/v2/     https://googleapis.com/oauth2/v4/token  TOKENS  ODELETE ⊣   Odotained On Expires On *Entity Requested For Token Descripti	Type:	OAuth 2.0 v		
Authorization Endpoint       https://accounts.google.com/o/oauth2/v2/         Token Endpoint       https://googleapis.com/oauth2/v4/token         TOKENS       DELETE       H         Obtained On       Expires On       *Entity       Requested For       Token Description	Application Name:     Client ID:     Client Secret.	Gmail connector OAuth2 116706595995-05vpm8mif6o7mpqte9nqt		
TOKENS       O DELETE       • Obtained On       Expires On       • Entity       Requested For       Token Description	Authorization Endpoint	https://accounts.google.com/o/oauth2/v2/		
Obtained Expires On Entity Requested For Token Description		700		
	Obtained Expires C	n Entity	Requested For	Token Descriptio
			K	4 35 0

Figure: Multi-token external application

# Integrations: Removal of Obsolete FedEx and UPS Plug-Ins

In Acumatica ERP 2025 R1, obsolete plug-ins for the FedEx and UPS carrier services have been removed.

#### Removal of the Obsolete FedEx Plug-In

On August 31, 2024, FedEx stopped supporting its SOAP API.

Starting in Acumatica ERP 2025 R1, the FedEx SOAP API is no longer supported, and the obsolete *FedEx* plug-in with the PX.FedExCarrier.FedExCarrier type has been removed. The system administrator should select the *FedExRest* plug-in with the PX.FedExRestCarrier.FedExRestCarrier type in the **Plug-In** box on the *Carriers* (CS207700) form instead.

## **Removal of the Obsolete UPS Plug-In**

On June 3, 2024, UPS stopped using its SOAP API.

Starting in Acumatica ERP 2025 R1, the UPS SOAP API is no longer supported, and the obsolete UPS plug-in with the PX.UpsCarrier.UpsCarrier type has been removed. The system administrator should select the UPS Rest plug-in with the PX.UpsRestCarrier.UpsRestCarrier type in the **Plug-In** box on the Carriers (CS207700) form instead.

# Inventory and Order Management: Changes to Access Rights in Predefined User Roles

User roles provide access to the forms needed in employees' everyday work. Implementation managers can use predefined user roles in Acumatica ERP to determine access for individual users instead of creating and setting up roles from scratch.

In Acumatica ERP 2025 R1, certain predefined user roles related to inventory and order management have been updated to include access rights to the inventory planning forms.

## **Updated Access Rights to Inventory Planning Forms**

i

The following table shows the updated access rights to inventory planning forms in the predefined user roles. *Full access* indicates the *Delete* restriction level; *no access* indicates the *Revoked* restriction level.

The inventory planning forms are available in the system only when the *Distribution Requirements Planning* or *Material Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Role	Role Description	Updated Access Rights
SO Admin	A person who performs the setup of the sales order functionality and configures the sales processes.	<ul> <li>Full access to the following forms:         <ul> <li>Forecast (AM202000)</li> <li>Forecast Listing (AM000005)</li> <li>Generate Forecasts (AM502000)</li> <li>Inventory Planning Preferences (AM100000)</li> <li>Inventory Planning Buckets (AM201200)</li> <li>Inventory Planning Requirements by Item (AM401200)</li> <li>Inventory Planning Results by Item (AM404000)</li> </ul> </li> <li>No access to any other inventory planning forms</li> </ul>
SO Manager	A person who creates sales orders, manages customer contracts (such as blanket sales orders), and views accounts receivable invoices and payments. This manager also nego- tiates customer terms, manages ap- provals, and oversees the sales op- eration staff and their activities.	<ul> <li>Full access to the following forms: <ul> <li>Forecast</li> <li>Forecast Listing</li> <li>Generate Forecasts</li> <li>Inventory Planning Buckets</li> <li>Inventory Planning Requirements by Item</li> <li>Inventory Planning Results by Item</li> </ul> </li> <li>View-only access to the Inventory Planning Preferences form</li> <li>No access to any other inventory planning forms</li> </ul>

Role	Role Description	Updated Access Rights
SO Clerk	A person who enters sales order da- ta, creates customer returns, prints and sends order confirmations, and manages customer inquiries.	<ul> <li>Full access to the following forms:</li> <li>Forecast Listing</li> <li>Inventory Planning Requirements by Item</li> <li>Inventory Planning Results by Item</li> <li>No access to any other inventory planning forms</li> </ul>
SO Viewer	A person who can view the progress of the sales orders being processed but cannot change them.	<ul> <li>Full access to the following forms:</li> <li>Forecast Listing</li> <li>Inventory Planning Requirements by Item</li> <li>Inventory Planning Results by Item</li> <li>No access to any other inventory planning forms</li> </ul>
PO Admin	A person who performs the setup of the purchase orders functional- ity and configures the purchasing processes.	Full access to all inventory planning forms
PO Manager	A person who creates purchase or- ders and requisitions and views ac- counts payable bills and payments. This manager also negotiates ven- dors' credit terms, manages vendor returns, manages approvals, and oversees the purchasing staff and their activities.	<ul> <li>View-only access to the <i>Inventory Planning Preferences</i> form</li> <li>Full access to all other inventory planning forms</li> </ul>
PO Buyer	A person who procures inventory to replenish the warehouse stock lev- els or to fulfill orders (planning of purchases, creation of purchase or- ders, and linking of purchase orders to fulfill sales orders). This employ- ee also reviews seasonality and re- plenishment settings for optimiza- tion and procurement.	<ul> <li>View-only access to the <i>Inventory Planning Preferences</i> form</li> <li>Full access to all other inventory planning forms</li> </ul>
PO Clerk	A person who enters purchase order data, creates vendor returns, and views inquiries and reports.	<ul> <li>Full access to the following forms: <ul> <li>Inventory Planning Results by Item</li> <li>Forecast Listing</li> <li>Inventory Planning Display (AM400000)</li> <li>Inventory Planning Exceptions (AM403000)</li> <li>Inventory Planning Requirements by Item</li> </ul> </li> <li>Full access to the Inventory Planning Display (AM632000) report</li> <li>No access to any other inventory planning forms</li> </ul>
PO Viewer	A person who can view the progress of the purchase orders being processed but cannot change them.	No access to any inventory planning forms

Role	Role Description	Updated Access Rights
IN Admin	A person who performs the setup of the inventory functionality and con- figures the inventory processes.	Full access to all inventory planning forms
IN Manager	A person who analyzes and man- ages warehouse activities and per- formance, takes responsibility for the physical movement of goods to and from the warehouse as well as inventory optimization and efficien- cy within the warehouse, and over- sees the warehouse staff and their activities.	<ul> <li>View-only access to the <i>Inventory Planning Preferences</i> form</li> <li>Full access to all other inventory planning forms</li> </ul>
IN Receiver	A person who receives purchases, inbound transfers, and customer re- turns, puts away received goods in- to designated warehouse locations.	No access to any inventory planning forms
IN Shipper	A person who picks, packs, and ships customer sales orders, out- bound transfers, and vendor re- turns, and confirms shipments.	No access to any inventory planning forms
IN Clerk	A person who performs cycle counts and inventory adjustments and restocks the inventory within the same warehouse according to the warehouse manager's plan.	No access to any inventory planning forms
IN Viewer	A person who can view the docu- ments related to the warehouse processes and inventory settings but cannot change orders and set- tings.	No access to any inventory planning forms

# **Additional Information**

Access rights for the user roles can be modified on the following forms:

- Access Rights by Screen (SM201020)
- Access Rights by Role (SM201025)

The following reports show details about access to forms that has been granted to user roles:

- Access Rights by Role (SM651500)
- Access Rights by Screen (SM651700)

For more information about user roles in the system, see *User Roles: General Information*. For details about distribution requirements planning (DRP), see *Inventory Planning with DRP: General Information* 

# Inventory and Order Management: Correction of Purchase Receipts for Drop-Ship Purchase Orders

In previous versions of Acumatica ERP, a user could not correct or cancel a purchase receipt that had been created for a purchase order with the *Drop-Ship* type if the receipt had already been released. That is, if any errors had been made in the lines of this receipt or the company did not accept the receipt for some reason and it had to be canceled, there was no way to fix the issue properly.

Acumatica ERP 2025 R1 now provides users with the ability to correct or cancel a released purchase receipt for a drop-ship purchase order. For this purpose, the **Correct Receipt** and **Cancel Receipt** commands have been added to the More menu on the *Purchase Receipts* (PO302000) form, as shown in the following screenshot.

Receipt DO	0043 - Al Fruits Ma + -0	и 0 + н	с э н	CATEGORY M	NETURN	() write	ACTIVITIES FLAT ELISTONICATION	800k8 +
lige Result State State State	Receipt - 100043 dr Reference 10004004 10004004 10004004		ALL/BUTS ALTO Will Prime Last Deep 20	en Und Anni	r barb tama sele	Processing	Printing and Emailing Him Particles Recept	0
0.010.0	-		- MILINE		(14) # FD . F4	Enter Landkit Clark	Reports Permane Rycost Killing Hoamy	
*****	NEADOPHOL DIE		(nor fast) Seads for Drap Sile Gents for Drap Sile	menesar menesar	1 Income 1999, JTo 1999, To	Convert Records	Purchase Network And and an	6.00

#### Figure: The Correct Receipt and Cancel Receipt commands

The functionality of receipt correction and cancellation for purchase orders with the *Drop-Ship* type is unavailable if the *Manufacturing* or *Service Management* feature is enabled on the *Enable/Disable Features* (CS100000) form. (The **Correct Receipt** and **Cancel Receipt** commands are not displayed on the More menu in this case.) We highly recommend that a company verify that there are no unreleased correction receipts in the system before it enables the *Manufacturing* or *Service Management* feature.

## Starting to Correct a Purchase Receipt for a Drop-Ship Purchase Order

The *Purchase Receipts* (PO302000) form is the starting point for correcting a released purchase receipt related to a purchase order with the *Drop-Ship* type. When the user clicks **Correct Receipt** on the More menu, the system checks whether all of the following conditions are met for the purchase receipt:

- The receipt includes at least one line of the Goods for Drop-Ship or Non-Stock for Drop-Ship type.
- The receipt does not include any lines of the Goods for IN or Non-Stock type.
- The receipt does not have related AP bills, except for AP bills that have been fully reversed.
- If the related drop-ship purchase order has the **Allow AP Bill Before Receipt** check box selected on the **Other** tab of the *Purchase Orders* (PO301000) form, this order does not have related AP bills, except for AP bills that have been fully reversed.
- No landed cost documents have been applied to the purchase receipt.
- The receipt does not have related purchase returns that have not been released yet.
- No sales invoices include the lines of this purchase receipt, except for canceled invoices.

If all of these conditions are met, the system creates a new purchase receipt with the next sequential number, which is a correction purchase receipt.



For simplicity, the correction purchase receipt will be referred to as the *correction receipt*, and the original purchase receipt will be referred to as the *original receipt*.

In the original receipt, the system inserts the number of the correction receipt into the new **Correction Doc. Ref. Nbr.** box on the **Other** tab of the *Purchase Receipts* form, as shown below. This number is also a link that a user can click. In the correction receipt, the system inserts the number of the original receipt (which is also a link) into the new **Original Doc. Ref. Nbr.** box on the same tab.

The carrent document has been corrected         Type       Recept 1       O × K K > X + mit         Type       Recept 1       Ventor       ALLPRUTS - All Fraits Mail       Inst Os       20.00         Status       Consta       Distance       Consta Bit	Receipt 0000	46 - All Fruit	s Mali		0	VOTES ACT	INTER	FLES	CUSTOMZATION	700L8 *
D       D       +	A The current	document has b	een corrected.							
Type     Receipt Inc.     Ventor:     ALLPRUTS - Al Fraits Mail     Initi Oly     20.00       Receipt Micro     000046     P     Locatem     MAN - Primary Location     Centrel Oly     20.00       Station     Genoald     Onume     Onume     Centrel Oly     20.00       Date     U101225     Vendor Rat     Course Bit     Centrel Oly     20.00       DetAut     010225     Vendor Rat     Centrel Oly     20.00       DETAut     010225     Vendor Rat     Other     Other       DETAut     010225     Vendor Rat     MADED COURTS     OTHER	5 5 4	0	D × K K	5 51 rei						
Receipt No.     000046     P     Lorshon     MAN - Primary Location     Central Dip     20.00       Date     Canceled     Counts Bit     Counts     Counts     20.00       Date     U132025     Vandor Rat     Counts     20.00       Date     U132025     Wardproug     Counts     20.00       DetWeit     01-2825     Wardproug     Counts     Counts       DETWEIX     OFDERIS     PUT AVWY     HISTORY     BLLING     LMADED COETS     OTHER	Type	Receipt	Vandor	ALL/RUITS - Al Fruits Mail	2	Total Dig		20.00		
Status     Canadad     Counter Bit     Unitable Quart.     20.00       Data     U102025     Vandar Hat     Define     Define     20.00       Define     01-3825     Warkproug     Define     Define     Define       Define     01-3825     Warkproug     Define     Define     Define       Define     0FDERS     FUT ANNY     HISTORY     BLLING     LMDED COSTS     DFHER       RECEIPT NFO     CostRECTIONS     Orgen Date Had Nation     Define     Define	Receipt Me	000046 /	D Location	MAIN - Primary Location		Central Dip		29.00		
Date     013028     Vendor Raf       Pess Pandel     01-3828     Warkproug Onnier       DETALS     0FDERS     FUT AVWY       HISTORY     BLLING     LMDED COETS       OFREE     CORRECTIONS       State Name     CORRECTIONS       State Name     CORRECTIONS	Oster.	Canceled		Create Bit		Childred Que	4	29.00		
Peer Peerlel 01-3825 Werkprog DetNaLS OFDERS FUTAVINY HISTORY BLLING LANDED-COETS 07HER RECEIPTING CORRECTIONS Organization Constructions Construction Construc	Date	6170125	Vandor flat							
DETALS ORDERS FUTAMINY INSTORY BLLING LINDED.COLTS 07HER RECEIPT MYO	PestPeriod	01-2825	Workgroup Osman							
RECEIPT INFO CORRECTIONS CORRECTIONS CORRECTIONS CORRECTIONS CORRECTIONS	DEMAN (	ADERI R	TANKY HISTORY	BLLNG LANDED COSTS 07	HER					
Ni Rut Nav 000108 Dispinal Day Rut Nav	RECEIPTING	(L		CORRECTIONS						
Research American Strategies Der Bart State 500647	the Plant, Note:	000108		Original Doc. Ruf. Mor.						
ET ALL AT THE - SHARE THE - SHARE THE OWNER AND THE THE ATT A	Brandy	HEADOFFIC	E - SeverLife Head	Correction Doc: Hef. Nov. 600547						
BR Date 1/17/2025 Revenuel IN Rol. Nor.	BR Date	9/17/2025		Reversal IN Rol. Nor.	-					

Figure: The link to the correction receipt in the original receipt

#### Making Changes to the Correction Receipt

The system copies all the data of the original receipt to the correction receipt on the *Purchase Receipts* (PO302000) form, and the user can make the needed updates to the correction receipt. When the user saves the correction receipt for the first time, the system assigns the new *Under Correction* status to the original receipt. Also, the system updates the value in the **Qty. On Receipts** column for the lines of the related purchase order on the *Purchase Orders* (PO301000) form based on any updated quantities in the linked lines of the correction receipt.

Although the user can print the original receipt with the *Under Correction* status, the user cannot do the following in the system for this receipt:

- Prepare an associated AP bill on the *Purchase Receipts* form
- Add this receipt to an AP bill on the Bills and Adjustments (AP301000) form
- Recognize the purchase receipt on the Incoming Documents (AP301100) form
- Prepare a related purchase return on the *Purchase Receipts* form
- Apply this receipt to a landed cost document on the Purchase Receipts or Landed Costs (PO303000) form

Also, the user cannot include the lines of an original receipt with the *Under Correction* status in the following documents:

- An AP bill for a related purchase order
- A sales invoice for a related sales order

In a correction receipt, the user cannot add new lines or delete lines that were copied from the original receipt. If a line in the original receipt had been added erroneously, the user can specify 0 in the **Receipt Qty.** column for the corresponding line in the correction receipt. This line will not be included in any of the following related documents during the processing of the correction receipt:

- AP bills
- Sales invoices
- Landed cost documents

In a correction receipt, the user can update the following elements in the Summary area of the *Purchase Receipts* form:

• The **Date** box

/i/

- The Create AP Bill check box
- The Vendor Ref. box
- The Workgroup box
- The **Owner** box

Also, the user can update the value in the **Currency Rate** box if the both of following conditions are met:

- The **Enable Rate Override** check box is selected on the **Financial** tab of the *Vendors* (AP303000) form for the vendor in the correction receipt.
- The Allow Changing Currency Rate on Receipt check box is selected on the *Purchase Orders Preferences* (PO101000) form.

In the lines of the correction receipt on the *Purchase Receipts* form, the user can edit the values in the following columns of the **Details** tab can:

- Warehouse
- Transaction Descr.
- UOM
- Receipt Qty.
- Expiration Date
- Lot/Serial Nbr.
- Unit Cost
- Ext. Cost

If the user changes a value in a purchase receipt line, the system automatically selects the check box in the new **Corrected** column for this line, as shown in the following screenshot. If the user changes the date or currency rate in the Summary area, the system automatically selects the check boxes in the **Corrected** column for all lines of the purchase receipt. The **Corrected** column is hidden by default.

Receipt - All	Fruits Ma	e e	оv к	< >	N RELEAS	E			D NOTES	ACTIVITES	PLES	DUSTOMIZATION	100LS +
Tair	Revist	- V	wher:	ALLFRUITS	At Fully Mall	1	Tine 0	60	85.00				-
Receipt Mar -	<new></new>	10 L	roller	MAN - Ports	ry Location		United	d Quart	66.00				
Sixtua:	Balanced			Consta Bill									
+Date	192125	10 V	wither Halt										
+ Paul Parist	01-2026	р з	totgoog			P							
		0	loter .			,0							
DESALS	ologie	NIAM	HISTORY	80.045	LINDED COSTS	011428							
0 + .	/ x	LINE DETALS	-			VERPO	н	8					
0 0 °0+++	**	terrentery 10	Line 1	104	Warehouse	Location		Transaction	Denn.		UOM	Records Ob.	Converteel
9 D HEAD	ornet	APPLES	Gool	to for IN	WHOLESALE	MAIN		Fresh appl	es 1 b		1.8	15.00	8
& D HEAD	SOFFICE	KINTS	Good	to for IN	THOLESALE	MAIN		Fresh kitele	18		18	45.00	a
. B. D. HEAD	OFFICE	CHRAMON	Geo	In fac the	THOLESALE	MAIN		Circanoo	posdal package	418	10	6.00	10

Figure: The Corrected column

## Completing the Correction of a Receipt

To complete the correction process, the user clicks **Release** on the More menu for the correction receipt. This causes the system to assign the *Released* status to the correction receipt and the *Canceled* status to the original receipt. For all lines of the correction receipt that have changes in the **Receipt Qty.** column on the *Purchase Receipts* (PO302000) form, the system does the following:

- Updates the quantities in the **Qty. On Receipts** column on the *Purchase Orders* (PO301000) form for the related purchase order
- Updates the quantities in the **Qty. On Shipments** and **Open Qty.** columns on the *Sales Orders* (SO301000) form for the related sales order

On the *Purchase Orders* and *Sales Orders* forms, the system performs the following actions, depending on whether the value in the **Receipt Qty.** column on the **Details** tab of the *Purchase Receipts* form has increased or decreased in lines of the correction receipt:

- If the quantity has decreased, the system does the following:
  - Reopens the corresponding lines of the related sales and purchase orders if they have already been completed. That is, the **Completed** check box is cleared for these lines on the **Details** tab.
  - If at least one line is reopened for the related purchase order that had the *Completed* status, assigns the *Open* status to the purchase order.
  - If at least one line is reopened for the related sales order that had the *Completed* status, assigns another status according to the order's workflow to it.
- If the quantity has increased, the system does the following:
  - Selects the **Completed** check box in the lines of the related sales order and purchase order if the full quantity of the item has been received.
  - If all lines of the related sales or purchase order become completed, assigns the *Completed* status to this order.

#### **Canceling a Purchase Receipt**

The *Purchase Receipts* (PO302000) form is the starting point for canceling a released purchase receipt related to a purchase order with the *Drop-Ship* type.

When the user clicks **Cancel Receipt** on the More menu, the system checks whether all of the following conditions are met for the purchase receipt:

• The receipt includes at least one line of the Goods for Drop-Ship or Non-Stock for Drop-Ship type.

- The receipt does not include any lines of the Goods for IN or Non-Stock types.
- The receipt does not have related AP bills, except for AP bills that have been fully reversed.
- If the related drop-ship purchase order has the **Allow AP Bill Before Receipt** check box selected on the **Other** tab of the *Purchase Orders* form, this order does not have related AP bills, except for AP bills that have been fully reversed.
- No landed cost documents have been applied to the purchase receipt.
- The receipt does not have related purchase returns.
- No sales invoices include the lines of this purchase receipt, except for canceled invoices.

If all of these conditions are met, the system displays a confirmation dialog box, as shown in the following screenshot. If the user clicks **OK**, the system assigns the *Canceled* status to the purchase receipt.

Receipt 000048 - All Fruits Maß	< > > ENTERAPE	NOTES ACTIVITES THES CUSTOMIZATION	700.5 -
Tatie         Recent         Vendor           Recent the         20048         2         Second           Statut         Research         2         Second           Statut         Research         1         Second         2           Statut         Research         1         Second         2           Statut         Research         1         Second         2           Statut         85.2025         Vendors that         2           Find. Family         85.2025         Vendors         2	ALLERGITS All Fruits Mail MANI - Primary Location County fail	<ul> <li>Selection 20, 20,00</li> <li>Control Op 20, 20,00</li> <li>Chanked Guart 20,00</li> </ul>	^
DETHER DADDRE PUTAMER HERDONY	all, Cancel Receipt	×	
O → P → LINE DETAILS	The purchase receipt will be can want to preceded with cancered to Line 1y VEB 402	coled Do you Statements Date:	KCM.
F & D HEADOFFICE APJAMIE	Conds BV W WHICKESALE	BD(N Apple jam 36 or	PECE
N D D HEADOFFICE KOWAMME	Goods for IN RETAIL	MAN Keirjam 98 sa	POCE
G D D HADDIFICE SALAND	Goods for IN RETAIL	BANA Banana pan 90 sz	PIECE

#### Figure: The Cancel Receipt dialog box

As soon as the purchase receipt is canceled, the system updates the related documents as follows:

- It reopens the linked lines of the related purchase and sales order if these lines have already been completed.
- If a related purchase order has the *Completed* status on the *Purchase Orders* (PO301000) form, the system assigns the *Open* status to it.
- If a related sales order has the *Completed* status on the *Sales Orders* (SO301000) form, the system assigns another status based on the order's workflow.
- In each linked line of the related purchase order, the system updates the value in the **Qty. On Receipts** column on the **Details** tab of the *Purchase Orders* form.
- In each linked line of the related sales order, the system updates the values in the **Qty. On Shipments** and **Open Qty.** columns on the **Details** tab of the *Sales Orders* form.

#### Correcting or Canceling a Purchase Receipt with a Canceled Invoice

If a purchase receipt for a drop-ship purchase order has a released sales invoice, this receipt also has a related inventory issue, which is the original inventory issue. If the user cancels the sales invoice and then cancels the purchase receipt, the system also automatically generates and releases a reversal inventory issue with a reversal batch of transactions that fully revert the transactions that were generated on the release of the original inventory issue. The reversal inventory issue is released automatically, regardless of the state of the **Release IN Documents Automatically** check box on the *Purchase Orders Preferences* (PO101000) form.

The link to the reversal inventory issue appears in the new **Reversal IN Ref. Nbr.** box on the **Other** tab of the *Purchase Receipts* (PO302000) form, as shown in the following screenshot.

Receipt 000	0058 - All Fruits M	all			8 ACTIVITES	FILES CUSTOM/24710N	toous -
<b>←</b> □	a + 0 (	0 - K	··· K < >				
Tipe:	Raceipt -	Ventor	ALLERUITS - All Fruits Mail	12	find Op:	1.00	^
Receipt Ner	000058 P	Location	MAIN - Primary Location		Control Qly	1.00	
Status.	Canceled		Create Bill		Urbilled Quant	1.00	
Date	1/17/2025	Vendor Raf					
Pest Paried	01-2025	Workgroup.					
		Owner					
DETAILS	ORDERIS PUT AN	WY HETORY	BILLING LANDED COSTS	OTHER			
RECEIPT INF	00		CORRECTIONS				
Pillel Nor.	000670		Original Doc. Hall Mbr				
Branch	HEADOFFICE - S	weed, Re Head	Correction Doc. Rel. Nor.				
Bill Date:	1/17/2025		Revenue IN Rul. Mar. 000071	1			
				162			

Figure: The link to the reversal inventory issue

#### Viewing Purchase Receipts with the Canceled or Under Correction Status

The following Acumatica ERP reports and inquiry forms have updates related to purchase receipts with the *Canceled* or *Under Correction* status for purchase orders with the *Drop-Ship* type.

On the *Purchase Receipt Summary* (PO620500) and *Purchase Order Receipt and Billing History* (PO643000) report form, the new **Include Canceled and Under-Correction Receipts** check box has been added to the **Report Parameters** tab, as shown in the following screenshot. By default, these reports do not include the purchase receipts with the *Canceled* or *Under Correction* status. If the user selects the check box, the reports include these receipts. In the *Purchase Receipt Summary* report, the quantity and extended cost of these purchase receipts are not included in the calculation of the total receipt quantity and total receipt extended cost.

Purchase Recei	pt Summary	10018 -
/ O RUNR	EPORT SAVE TEMPLATE TEMPLATE EDIT REPORT	
Template		
	Default [] Blased	
REPORT PARAMETE	ADDITIONAL SORT AND PLITERS PRINT AND DUAL SETTINGS REPORT VERSIONS DUAL NOTPICATIONS	
Company/Branch:	HEADOFFICE - Sweet, Re Head Off	
Shert Date	852025	
End Date	8/15/2525 🖂	
Vandor 8D	P	
	include Cancaled and Under-Connection Receipts	

#### Figure: The Include Canceled and Under-Correction Receipts check box

The following reports include the purchase receipts with the *Under Correction* status but exclude the purchase receipts with the *Canceled* status:

- Purchase Accrual Summary (PO630500) report
- Purchase Accrual Details (PO631000) report

These purchase receipts with the Under Correction or Canceled status are not listed in the following reports:

- Purchase Receipt Billing Summary (PO631500)
- Purchase Receipt Billing Details (PO632000)
- Purchase Receipt Details by Vendor (PO621000)
- Purchase Receipt Allocated and Backordered (PO622000)

On the *Purchase Accrual Balance by Period* (PO402000) inquiry form, the purchase receipts with the *Under Correction* or *Canceled* status are shown according to the following rules:

- The inquiry form does not show the purchase receipts with the *Canceled* or *Under Correction* status that do not have a canceled sales invoice and a related inventory issue because there are no transactions posted to the PO Accrual account at this moment.
- The inquiry form shows the purchase receipts with the *Under Correction* status that have a canceled sales invoice and a released inventory issue because transactions to the PO Accrual account in the original inventory issue are not reversed and still affect the PO Accrual account.
- The inquiry form does not show the purchase receipts with the *Canceled* status that have a canceled sales invoice and a released inventory issue because the original inventory transactions are already reversed in the reversal inventory issue if the purchase receipt is canceled.

In previous versions of Acumatica ERP, a user could not correct or cancel a purchase receipt that had been created for a purchase order with the *Normal* type if the receipt had already been released. That is, if any errors had been made in the lines of this receipt or the company did not accept the goods for some reason and the receipt had to be canceled, there was no way to fix the issue properly.

Acumatica ERP 2025 R1 now provides users with the ability to correct or cancel a released purchase receipt for a purchase order with the *Normal* type. For this purpose, the **Correct Receipt** and **Cancel Receipt** commands have been added to the More menu on the *Purchase Receipts* (PO302000) form, as shown in the following screenshot.

Receipt DOC	1043 - Ali Fruits Mai	0 + H	с. ж	Contra And	ME METURN	Quints	ACTIVITES PLAS DISTONUTION	800LB +
Type Hannel Alle Toldar Data Data Data Data	Recept Beland Related 1025000 1025000 102500 102500 102500 102500 102500 102500 102500	Annen Lasenne Sennen Generer	ALLPRUITS AFFIN	n Unit	- faarte taans sook	Processing total Arrive total Arrive Deer Landet Curle Reven	Printing and Emering Him: Particles Record Other Apply Assignment Ruley Baconts	0
0	/ Incista	4.5			-	Conactions	Purchase Groups String Housey	
****	NEADONNES AND	ATR 0	ter fant. Sende for Strap-Strap		10-000	Correct Receipt Carriert Receipt	Purchase General Altorated in	5.5E
	HEADOPPICE CHES	LINE I	South for Drop-Ship	INCLESALE	<\$PLT:	Chang Jam Wile	P452 18 8	6.08

#### Figure: The Correct Receipt and Cancel Receipt commands

The functionality of receipt correction and cancellation for purchase orders with the *Normal* type is unavailable if the *Manufacturing* or *Service Management* feature is enabled on the *Enable/Disable Features* (CS100000) form. (The **Correct Receipt** and **Cancel Receipt** commands are not displayed on the More menu in this case.) We highly recommend that a company verify that there are no unreleased correction receipts in the system before it enables the *Manufacturing* or *Service Management* feature.

#### **Starting to Correct a Purchase Receipt**

The *Purchase Receipts* (PO302000) form is the starting point for correcting a released purchase receipt related to a purchase order with the *Normal* type.

When the user clicks **Correct Receipt** on the More menu, the system checks whether all of the following conditions are met for the purchase receipt:

- The receipt includes at least one line of the Goods for IN, Non-Stock for IN, Service, or Freight type.
- The receipt does not have related AP bills, except for AP bills that have been fully reversed.
- The receipt does not include any lines of the Goods for RP, Goods for Project, or Non Stock for Project type.
- If the related purchase order has the **Allow AP Bill Before Receipt** check box selected on the **Other** tab of the *Purchase Orders* (PO301000) form, this order does not have related AP bills, except for AP bills that have been fully reversed.
- No landed cost documents have been applied to the purchase receipt.
- No putaway transfers have been prepared for the purchase receipt.
- The receipt does not have related purchase returns that have not been released yet.

• The stock is not locked due to a physical inventory count.

i

If all of these conditions are met, the system creates a new purchase receipt with the next sequential number.

For simplicity, the newly created purchase receipt will be referred to as the *correction receipt*, and the purchase receipt in which the user clicked **Correct Receipt** as the *original receipt*.

In the original receipt, the system inserts the number of the correction receipt into the new **Correction Doc. Ref. Nbr.** box on the **Other** tab of the *Purchase Receipts* form, as shown below. This number is also a link that a user can click. In the correction receipt, the system inserts the number of the original receipt (which is also a link) into the new **Original Doc. Ref. Nbr.** box on the same tab.

Parlace Recepts Receipt 000046 - All Fruits Mall	0	HOTES ACTIVITIES	FILES CUSTOM/24TION	TOOLS +
A The current document has been connoted.				
5 5 + 0 5 0 × K (	> >I			
Type Receipt - Vendor	ALLERUITS - All Fruits Mail 🧳	Total Oly	20.00	•
Nacept Ner 000046 /P Location Drates Canceled	MAN - Primary Location	Central Dig Untilled Quant	29.00	
Date 0172525 Vendor Raf.				
Pest Perint 01-2525 Workprogr Owner				
DETALS OFDERS PUTAWAY HISTORY	BLLNG LANDED COSTS OTHER			
RECEIPT INFO	CORRECTIONS	1		
8x Ruf. Nor 000108	Driginal Doc. Ruf. Mp.			
Eventy HEADOFFICE - SweetLife Head	Correction Doc. Hat No. 600647			
58 Date: \$1772525	Revenue IN Rol. Nor.			

Figure: The link to the correction receipt in the original receipt

#### Making Changes to the Correction Receipt

The system copies all the data of the original receipt to the correction receipt on the *Purchase Receipts* (PO302000) form, and the user can make the needed updates to the correction receipt. When the user saves the correction receipt for the first time, the system assigns the new *Under Correction* status to the original receipt. Also, the system updates the value in the **Qty. On Receipts** column for the lines of the related purchase order on the *Purchase Orders* (PO301000) form based on any updated quantities in the linked lines of the correction receipt.

Although the user can print the original receipt with the *Under Correction* status, the user cannot do the following in the system for this receipt:

- Prepare an associated AP bill on the *Purchase Receipts* form
- Add the original receipt to an AP bill on the *Bills and Adjustments* (AP301000) form
- Recognize the original receipt on the *Incoming Documents* (AP301100) form
- Prepare a related purchase return on the *Purchase Receipts* form
- Apply the original receipt to a landed cost document on the *Purchase Receipts* or *Landed Costs* (PO303000) form
- Process putaway transfers for the original receipt on the Receive and Put Away (PO302020) form

Also, the user cannot include the lines of an original receipt with the *Under Correction* status in an AP bill for a related purchase order.

In a correction receipt, the user cannot add new lines or delete lines that were copied from the original receipt. If a line in the original receipt had been added erroneously, the user can specify 0 in the **Receipt Qty.** column for the corresponding line in the correction receipt. This line will not be included in any of the following related documents during the processing of the correction receipt:

- AP bills
- Landed cost documents

In a correction receipt, the user can update the following elements in the Summary area of the *Purchase Receipts* form:

• The Date box

<u>(I)</u>

- The Create AP Bill check box
- The Vendor Ref. box
- The Workgroup box
- The **Owner** box

Also, the user can update the value in the **Currency Rate** box if both of the following conditions are met:

- The **Enable Rate Override** check box is selected on the **Financial** tab of the *Vendors* (AP303000) form for the vendor in the correction receipt.
- The **Allow Changing Currency Rate on Receipt** check box is selected on the *Purchase Orders Preferences* (PO101000) form.

In the lines of the correction receipt on the *Purchase Receipts* form, the user can edit the values in the following columns of the **Details** tab:

- Warehouse
- Location
- Transaction Descr.
- UOM
- Receipt Qty.
- Expiration Date
- Lot/Serial Nbr.
- Unit Cost
- Ext. Cost
- Account (for non-stock items only)
- Subaccount (for non-stock items only)
- Accrual Account
- Accrual Sub.

If the user changes a value in a purchase receipt line, the system automatically selects the check box in the new **Corrected** column for this line, as shown in the following screenshot. Also, if the user changes the date or currency rate in the Summary area, the system automatically selects the check boxes in the **Corrected** column for all lines of the purchase receipt. The **Corrected** column is hidden by default.

Receipt - A	Fruits Ma	ā						D NOTES	ACTIVITES	FLES	DUSTOM/24T/ON	10018 +
t 1)	Ø +	0 B	0 - к	< >	N RELEAS	e (m))						
Tak	Rost		Anitar .	ALL/RUITS	Al Folio Mal	1	Trial Op.	65.00				-
Receipt Mer :	<new></new>	.0 1	acater	MAN - Porei	ry Location		Unbilled Quart	66.00				
Diates:	Balanced			Consta Bill								
+Date:	19/2828	10 1	Anthe Halt									
+ Paul Parist	01-2026	P 1	to Aprop			P						
			Donar			,p						
DETALS	ORDERS	NEADE	HISTORY	80.045	LINDED COSTS	01969						
0 +	/ X	LINE DETAL	100104			VERPO	HR					
e e O *e+	et.	terrenterry 10	1.04	10.0	Warehouse	Location	Turis	other Desig		UOM	Records Ob.	Carrychell
9 D HEA	DOFFICE	APPLES	Goe	to for IN	WHOLESALE	MAIN	Fresh	apples 1 lb		18	15.00	8
0 D HEA	DOFFICE	KINTS.	Gee	to for IN	THOLESALE	MAIN	Fresh	Kiels 1 lb		18	45.00	0
. B. D. HEA	DOFFICE	CREWINGS	Gau	to far thi	THOLESALE	MAIN.	Cinna	mon pourdet package	4118	1.0	6.00	12

Figure: The Corrected column

## Completing the Correction of a Receipt

To complete the correction process, the user clicks **Release** on the More menu of the *Purchase Receipts* (PO302000) form for the correction receipt. On release of the correction receipt, the system validates the state of inventory. That is, it verifies whether the corrected items can be issued with the original quantity and cost.

If the validation fails, the system shows an error message, and the user can make additional changes if they want to proceed with the correction. The user can also delete the correction receipt if the correction cannot be performed.

If the validation is successful, the system generates and releases a correction inventory issue for the correction receipt. The user can find the link to this issue in the **IN Ref. Nbr.** box on the *Purchase Receipts* (PO302000) form. This issue will be released automatically, regardless of the state of the **Release IN Documents Automatically** check box on the *Purchase Orders Preferences* (PO101000) form. For details on this validation and the correction inventory issue, see *Inventory Validation and Issue*.

After the correction inventory issue is released, the system assigns the *Released* status to the correction receipt and the *Canceled* status to the original receipt.

Also, for each line of the correction receipt that has changes in the **Receipt Qty.** column on the *Purchase Receipts* form, the system updates the quantity in the **Qty. On Receipts** column of the *Purchase Orders* (PO301000) form for the related purchase order. The system changes the purchase order as follows, depending on whether the line's corrected receipt quantity has increased or decreased:

- If the line quantity has decreased, the system reopens the corresponding line of the related purchase order if it has already been completed. That is, it clears the **Completed** check box for these lines on the **Details** tab. If at least one line is now reopened for the related purchase order and it had the *Completed* status, the system assigns the *Open* status to the purchase order.
- If the line quantity has increased, the system selects the **Completed** check box in the line of the related purchase order if the full quantity of the item has been received. If all lines of the related purchase order are now completed, the system assigns the *Completed* status to the purchase order.

Also, if the purchase order of the original receipt has a related sales order with lines that are marked for purchase on the *Sales Orders* (SO301000) form, in this sales order, the allocated quantities will be updated in the **Line Details** dialog box of that form.

#### **Canceling a Purchase Receipt**

The *Purchase Receipts* (PO302000) form is the starting point for canceling a released purchase receipt related to a purchase order with the *Normal* type.

When the user clicks **Cancel Receipt** on the More menu, the system checks whether all of the following conditions are met for the purchase receipt:

- The receipt includes at least one line of the Goods for IN, Non-Stock for IN, Service, or Freight type.
- The receipt does not have related AP bills, except for AP bills that have been fully reversed.
- The receipt does not include any lines of the Goods for RP, Goods for Project, or Non Stock for Project type.
- If the related purchase order has the Allow AP Bill Before Receipt check box selected on the Other tab of the *Purchase Orders* (PO301000) form, this order does not have related AP bills, except for AP bills that have been fully reversed.
- No landed cost documents have been applied to the purchase receipt.
- No putaway transfers have been prepared for the purchase receipt.
- The receipt does not have related purchase returns.
- The stock is not locked due to a physical inventory count.

If all of these conditions are met, the system displays a confirmation dialog box, as shown in the following screenshot. If the user clicks **OK**, the system validates the state of inventory. That is, it verifies whether it is possible to issue the corrected items with the original quantity and cost. For details on the validation, see *Inventory Validation and Issue*.

If the validation fails, the system shows an error message. If the validation is successful, the system generates and releases a reversal inventory issue with the *Issue* type of transactions. This issue will be released automatically, regardless of the state of the **Release IN Documents Automatically** check box on the *Purchase Orders Preferences* (PO101000) form. The user can find the link to this issue in the **Reversal IN Ref. Nbr.** box on the **Other** tab of *Purchase Receipts* form. Then the system assigns the *Canceled* status to the purchase receipt.

If a purchase receipt is canceled, the system does not recalculate the cost statistics on the **Price**/ **Cost** tab of the *Stock Items* (IN202500) or *Item Warehouse Details* (IN204500) form for items that were included in this receipt.

Receipt 00	0048 - All Fruits I + 40	Mail D = K	· · · ·	N ENTERADO		res activities rue	s customization tooks -
Taske Record Nor- Statut Date Find Parent	Recept – 200048 // Released 947/0025 84-2025	Verda Sacates Vanas Dat Wedgesar Career	ALLERVITS ARA MAN - Prenary Lo County fill	rum Met callen	✓ Intel®	n 30.00 Op 10.00 i Guert 30.00	
DETRES	DADDER FUTA	ANY. HENDONY	Cancel R	eceipt.	×		
0 -	J = LINEO	ETAILS	The purch want to pr	une recept will be ca scend with canceling	volet Do you the milept?	8	
8400	Brand In	namory \$7	Ling	YES 60		Racington Date:	14234
	HEADOFFICE A	PUMME	Conds W 70	WHOLESALE	AULN	Apple jam 56 oz	PECE
	HEADOFFICE 8	BOMANOS	Goods for IN	RETAL	BAN	Kwijam 90 cu	PIECE
€ D ⊡	HEADOFFICE \$	NUMBE	Goods for IN	RETAL	BEACH	Benaria part 50 sz	PRCE

#### Figure: The Cancel Receipt dialog box

As soon as the purchase receipt is canceled, the system updates the related documents as follows:

- It reopens the linked lines of the related purchase order if these lines have already been completed.
- If a related purchase order has the *Completed* status on the *Purchase Orders* form, the system assigns the *Open* status to it.
- In each linked line of the related purchase order, the system updates the value in the **Qty. On Receipts** column on the **Details** tab of the *Purchase Orders* form.

## **Inventory Validation and Issue**

The correction of a purchase receipt for a purchase order with the *Normal* type can be one of the following types:

- A correction that does not update the state of the inventory or the information in the original inventory receipt, such as the correction of the vendor reference number or the transaction description.
- A correction that updates the state of the inventory or the information in the original inventory receipt, such as the correction of the receipt quantity or unit cost.

For the first type of correction, the system does not perform inventory validation. For the second type, the system verifies whether stock items can be issued in the quantity of the original receipt and at the original cost based on the current inventory state. This validation is required because some quantities could have already been sold, shipped, or transferred by the moment of the correction.

The system validates only stock items from the original inventory receipt. For items with the *FIFO* and *Specific* valuation methods, the validation is performed for the cost layers that have been updated on the release of the original inventory receipt. That is, for items with the *FIFO* valuation method, the system verifies if these items can be issued from a cost layer with the reference number of the original inventory receipt. For items with the *Specific* valuation method, the system verifies the cost layers of the lot or serial numbers included in the original inventory receipt.

To verify if the original quantity of stock items can be issued, the system validates their available-for-issue quantity. For items with the *FIFO*, *Average*, and *Standard* valuation methods, if this quantity is not sufficient in the cost layer of an item, the system also checks whether negative quantities are allowed for the item. That is, it checks the state of the **Allow Negative Quantity** check box on the *Item Classes* (IN201000) form for the item class. Depending on the state of the check box, the system does either of the following:

- If the check box is cleared for the item class, the system prohibits the issue of the items of the class. The validation fails, and the system shows an error message.
- If the check box is selected for the item class, the system allows the original quantity of the item of the class to be issued if the original quantity is greater than the available-for-issue quantity and is not greater than the quantity on hand.

For a stock item, the system does not allow the release of a correction or cancellation purchase receipt if the resulting on-hand quantity in the inventory will remain or become negative for this stock item due to the correction or cancellation. This is true regardless of the state of the **Allow Negative Quantity** check box for the class of the item.

Note that inventory validation applies a specific rule if the original receipt was prepared for a purchase order linked to a sales order that is marked for purchase. If this sales order has a prepared shipment for an item, the quantity of this item in the correction receipt cannot be less than the quantity in the shipment.

If the validation fails, the system shows an error message. If the validation completes successfully and the items can be issued in the quantity and at the cost of the original receipt, the system generates and releases the correction inventory issue. The inventory issue includes transactions of the *Issue* and *Receipt* type for each corrected line of the purchase receipt on the *Purchase Receipts* (PO302000) form, excluding the following lines:

- The lines whose correction does not update the state of the inventory.
- The lines whose quantity was changed to 0. For these lines, only the transactions with the *Issue* type are included.
- The lines with the *Service* or *Freight* type. These lines are not included either in the inventory receipt for the original receipt, or in the inventory issue for the correction receipt.

If the cost is edited in the correction receipt, the correction inventory issue may also include transactions with the *Adjustment* type. For details, see *Specifying a Correction Reason Code*.

On the release of the correction inventory issue, the system first processes the transaction with the *Receipt* type and then processes the transaction with the *Issue* type.

 $\Delta$ 

An item can be issued at a cost that differs from the cost in the original receipt if the resulting on-hand quantity is 0 in the cost layer from which the item is issued.

The system does not validate the quantity and cost of lines with non-stock items. A non-stock item is included in a correction inventory issue if at least one of the following values has been changed for it:

- Warehouse
- Location
- UOM
- Receipt Qty.
- Unit Cost
- Ext. Cost
- Account
- Sub.
- Accrual Account
- Accrual Sub.

#### Reviewing an Example of a Correction Inventory Issue

The following example illustrates the process of correction and the correction inventory issue for stock items with different valuation methods. Suppose that the company has the following items in stock:

- An item with the FIFO valuation method whose on-hand quantity is 100.
- A serial-tracked item with the *Specific* valuation method. The serial numbers from *LRF00001* to *LRF000015* are on hand.
- An item with the Average valuation method whose on-hand quantity is 100.

On the *Purchase Receipts* (PO302000), a user releases the *002325* purchase receipt for a purchase order with the *Normal* type. The purchase receipt includes lines with the following items and their settings:

- An item with the *FIFO* valuation method:
  - Receipt Qty.: 100
  - Unit Cost: 100
- Two serial-tracked items with the following numbers: *LRF000016* and *LRF000017*. Both items have a unit cost of *100*.
- An item with the Average valuation method:
  - Receipt Qty.: 100
  - Unit Cost: 100

On the *Purchase Receipts* form, the user clicks **Correct Receipt** on the More menu. The system creates a correction receipt. In the correction receipt, the user makes the following changes:

- The unit cost of the item with the *FIFO* valuation method is changed from 100 to 95.
- The LRF000016 serial number is changed to LRFC00016.

The system releases a correction receipt and generates a correction inventory issue with the following transactions:

- A transaction with the *Issue* type for the item with the *FIFO* valuation method:
  - Quantity: 100
  - Unit Cost: 100
  - The item is issued from the cost layer of the 002325 purchase receipt.
- A transaction with the *Issue* type for the serial-tracked items:

- Lot/Serial Nbr.: LRF000016 and LRF000017
- Quantity: 2
- Unit Cost: 100
- A transaction with the *Receipt* type for the item with the *FIFO* valuation method:
  - Quantity: 100
  - Unit Cost: 95
- A transaction with the *Receipt* type for the serial-tracked items:
  - Lot/Serial Nbr.: LRFC00016 and LRF000017
  - Quantity: 2
  - Unit Cost: 100

#### Specifying a Correction Reason Code

On the **General** tab of the *Posting Classes* (IN206000) form, the **Purchase Receipt Correction Reason Code** box has been added, as shown in the following screenshot. The system posts transactions to the account of this reason code if both of the following conditions are met:

- The unit cost or extended cost of an item with this posting class has been changed in a line of a correction receipt.
- A part of the received quantity has already been issued, sold, or transferred from the receiving warehouse.

Posting Classes FDI - Food Items	D NOTES ACTIVITIES	FILES CUSTOMIZATION TOOLS .
5 B 0 + 8	о - к < > >i	
• Class ID	FDI	٥
Description	Feed Items	
GENERAL GLACCOUNTS		
Use Inventory/Accrual Account Iron	Posting Class	-
Use Sales Account from	Posting Class	-
Use COGS/Expense Account from	Posting Class	-
Use Std. Cost Variance Account from	Posting Class	÷
Use Std. Cost Revaluation Account from:	Posting Class	
Use PO Account Account from	Posting Class	-
Use Purchase Price Variance Account #	Posting Class	*
Use Landed Cost Variance Account from	Posting Class	*
Phys Inventory Reason Code	PHYINVADJ - Physical Inventory Adju-	Q
Purchase Receipt Correction Reason Co.	INISSUE - Direct Issues	Q

#### Figure: The Purchase Receipt Correction Reason Code box

Suppose that on the *Purchase Receipts* (PO302000) form, a purchase manager has processed a purchase receipt with a line that contains 10 items with the *Average* valuation method and a unit cost of *10*. Once the purchase receipt is released, the on-hand quantity of the item is *10*, and its total cost is *100*.

On the same day, a sales manager has sold five units of the item with a unit cost of 10. The remaining on-hand quantity of the item is 5, and the total cost is 50.

The purchase manager finds out that the unit cost of the received item should be 7, not 10. The manager clicks **Correct Receipt** on the *Purchase Receipts* form and specifies 7 as the unit cost in the line of the correction receipt. On the release of the correction receipt, the system generates and releases a correction inventory issue. On the release of the issue, the system posts the following transactions to the general ledger.

Account	Debit	Credit
Inventory account	70 (the receipt of the corrected values)	0
PO accrual account	0	70
Inventory account	0	100 (the issue of the original amount)
PO accrual account	100	0
Inventory account	15 (the difference in cost for the sold units)	0
The account of the correction rea- son code	0	15 (the difference in cost for the off- set units)

# Viewing Purchase Receipts with the Canceled or Under Correction Status

The following Acumatica ERP reports and inquiry forms have updates related to purchase receipts with the *Canceled* or *Under Correction* status for purchase orders with the *Normal* type.

- In the reports and inquiry forms that are related to purchase orders:
  - Purchase receipts with the *Canceled* status are not listed in the following reports and on the following inquiry forms:
    - Purchase Receipt Details by Vendor (PO621000)
    - Purchase Receipt Allocated and Backordered (PO622000)
    - Purchase Accrual Summary (PO630500)
    - Purchase Accrual Details (PO631000)
    - Purchase Receipt Billing Summary (PO631500)
    - Purchase Receipt Billing Details (PO632000)
    - Purchase Accrual Balance by Period (PO402000)
  - Purchase receipts with the Under Correction status are not listed in the following reports:
    - Purchase Receipt Details by Vendor
    - Purchase Receipt Allocated and Backordered
    - Purchase Receipt Billing Summary
    - Purchase Receipt Billing Details
  - Purchase receipts with the Canceled or Under Correction status can be listed in the Purchase Receipt Summary (PO620500) and Purchase Order Receipt and Billing History (PO643000) reports. These receipts are included if the new Include Canceled and Under-Correction Receipts check box is selected on the Report Parameters tab of the report form. In the Purchase Receipt Summary report, the Total Receipt Qty. value does not include quantities from these receipts, regardless of the state of the check box.
  - Purchase receipts with the *Under Correction* status are listed in the following reports and on the following inquiry form:
    - Purchase Accrual Summary
    - Purchase Accrual Details
    - Purchase Accrual Balance by Period
- In the reports and inquiry forms that are related to inventory:

- The transactions with the *Issue*, *Receipt*, and *Adjustment* types from the correction and reversal inventory issues are listed on the following inquiry forms:
  - Inventory Transaction History (IN405000)
  - Inventory Transaction Details (IN404000)
  - Inventory Transactions by Account (IN403000)
  - Inventory Lot/Serial History (IN407000)
- On the *Inventory Turnover* (IN407010) inquiry form, if the **Include Issues and Adjustments** check box is selected on the *Inventory Preferences* (IN101000) form, the amounts and quantities of correction and reversal issues type are not included as sold amounts and quantities in the turnover formula.

In the summarized format of the *Historical Inventory Balance* (IN616000) and *Historical Inventory Valuation* (IN617000) reports, the quantities from canceled purchase receipts are not included in the **Receipt** column. Also, the quantities from the correction and reversal inventory issues are not included in the **Issue** column. The detailed format of these reports lists all transactions, including the transactions for correction and reversal inventory issues.

The *Inventory Transaction History* and *Inventory Transaction Details* inquiry forms list all inventory transactions, including the corrected transactions. If the **Summary by Day** check box is selected on either form, the following columns contain summarized values for all transactions, including the transactions for correction and reversal inventory issues: **Qty. In**, **Qty. Out**, **Cost In**, and **Cost Out**.



If inventory reports look inaccurate after a receipt correction or cancellation was performed in the system, the user should recalculate the inventory on the *Recalculate Inventory* (IN505000) form.
# Inventory and Order Management: Lot and Serial Attributes for Stock Items

In previous versions, users could not assign attribute values to a unit of a stock item with a particular serial number or to units of a stock item with a particular lot number. As a result, inventory management and sales processes required manual efforts to track additional information about stock items, which was inefficient and could lead to errors.

Acumatica ERP 2025 R1 provides users with the ability to define attributes for a lot or serial class and manage the set of the attributes for a unit of a stock item with a lot or serial number. Users can assign attributes to items in stock, correct lot or serial attribute values that were incorrectly entered, and review and update information on lot- or serial-tracked items. Also, they can search for the necessary items by these attributes to add them to a sales document. This functionality becomes available if the company has the *Lot/Serial Attributes* feature enabled on the *Enable/Disable Features* (CS100000) form.

In 2025 R1, the functionality is not supported in Manufacturing, Field Services, and Retail Commerce.

The following sections describe the changes related to this functionality in Acumatica ERP 2025 R1.

#### Changes to the Enable/Disable Features Form

The Lot/Serial Attributes check box has been added under Experimental Features on the Enable/Disable Features (CS100000) form. This check box becomes available for selection if the Lot and Serial Tracking check box is selected under Inventory and Order Management.

## Changes to the Lot/Serial Classes Form

The Lot/Serial Classes (IN207000) form now has two tabs. The table that lists the segments of the lot or serial numbers to be used for items of the class is now shown on the **Numbering Settings** tab. The **Attributes** tab lists the lot or serial attributes for items of the class. By default, the system will use these attributes for each newly created item. The following screenshot shows the updated layout of the form.

A user can add attributes and specify their values for an item of a lot or serial class only if the tracking method is either *Track Serial Numbers* or *Track Lot Numbers* and the assignment method is *When Received*. If the item has a different tracking method or assignment method (or both), the **Add** and **Delete** buttons are unavailable on the tab.

SF	ENTER	R - 5	ierial N	abr., W	/hen l	Recei	ved, Iss	we M	ethod	I Ente	rable	C) works	ACTIVITIES	PLES	CUSTORIZATIO	M TOOLS
*		22	0	+	8	0	ĸ	<	>	н						
	Charge (D)				STE	NIER				0						
6	becque				Sets	al Nor . 1	Vhan Rec	eived, I	sure M	ette:						
	fracking h	April 1			Tiac	k Sorial	Numbers			-						
					Dh	A Exp	ution Day									
					DR	ound t	or Drop-ter	10								
13		1.500	heid		Whe	n Gezar	red			-						
	true Met	int :			User	Enteral	tie			$\sim 1$						
						are Ash	-to/stat	rat Ves	A 2114	terri (Ali	Obs.					
124	Auto-Incre	-	e Vister													
					DA	kà-Giệne	rate Mind	North	0							
3	May Aver	Giela	title Nur	des												
	ONDERN	0.55	TTNOS	AT	TRANUT	ES .										
0	+	×	H	N												
9	Acres		*Amb	0.40	.04	scription								Sert Order	Repited	Coverol. Type
×.	8		BATTE	STUFF	.80	diry th	tours								8	Number
	9		000	R	0	ile .									0	Carebo
	R		STOR	AGE		stage c	eacity									Test
	121		VEAD		- 14	200									12	Teres

Figure: The Lot/Serial Classes form

# Changes to the Stock Items Form

On the **Attributes** tab of the *Stock Items* (IN202500) form, the **Lot/Serial Attributes** table has been added (see the following screenshot). The table shows attributes for a particular lot- or serial-tracked item. By default, the table has the lot or serial attributes specified for the lot or serial class assigned to the item.

CAMERA	I - Video came	ra Canon XA60			1700-000 7000				
	- <b>T</b> 0	8 0 * 1		/ _/					
Inventory ID.	VCAN	ERA1 - Video camera	Carron XV ,D	Poi	tict Wedge	api i			p *
Non Status	Active			Pin	tuct Manager				,p
Description	Video	camera Canon XA60							
GENERAL	PRICECOST	WAREHOUSES	VENDORS	ATTRIP	ITES IN	CONSING	CROSS-REP	ERENCE	18
Attributes									
B Aprilute	Repin G	regory Value							
Color		tribule							
Configurat	A	anoute							
Pael Sce	- D A	thibute							
Wide Angle	- D A	troue							
Lot/Serial At	ributes								
0 +	XHM								
B Active	Attribute ID	Description		Replicat	Control Ty	pł.			
) 2	BATTERYLFH	Battery life, hours		8	Number				
	COLOR	Color		0	Combo				
B		Storage capacity		C1	Text				
N	STORAGE	Colored a contraction							

Figure: The Lot/Serial Attributes table on the Stock Items form

# **Changes to the Purchase Receipts and Receipts Forms**

On the *Purchase Receipts* (PO301000) and *Receipts* (IN301000) forms, the **Lot/Serial Attributes** table has been added to the **Line Details** dialog box (see the following screenshot). The table contains the attributes and attribute values that are specified for the unit of the stock item selected in the line.

 $\triangle$ 

A user must enter the lot or serial number first; then they can specify attributes for the lot or serial numbers in the **Lot/Serial Attributes** table.

Type Norset	- H B	-	FLEEARTCOM - Saur COM	Dechare In: 2 Total Ca	times and			
Former Balance - Date 17002 - Post Parcel 81-202	4 0 9	Line Details (hatespect2) County 10 Acces		• Bellariles Seree	Sec.Adm/Dalifition Informatic	Lot Denie Attribut		
0 + / ×		B "Lorente 1 STORAGE STORAGE STORAGE STORAGE STORAGE STORAGE		Resolution Carbon to Charles Proceed Charles Proceed Charles Proceed Charles Proceed Charles Proceed Charles Proceed Charles Proceed Charles Proceed	Cantory - 1 100 - 1 100 - 1 100 - 1 100 - 1	<ul> <li>Amilian D</li> <li>BATTERICIA</li> <li>COLOR</li> <li>BITOHAGE</li> <li>VEAB</li> </ul>	100.00 3 00.00 3004	

Figure: The Lot/Serial Attributes table in the Line Details dialog box

For each lot or serial number, a user can specify different attribute values. The user can assign all the attribute values from the first line to all the items in the table by clicking **Use Attributes from First Line** on the table toolbar (Item 1 in the following screenshot).

Also, for each lot or serial number, the user can specify the manufacturer's lot or serial number in the **Manufacturer Lot/Serial Nbr.** column (Item 2).

Unercopied Qly Qualitity to Deverse	0.00	• Blart Loichenal Number, SHC	ANNON2107000 @RATE	019					
0 + x	USE ATTRIBUTES FROM					LotiBerial Attribut	**		
-Loopen	Latterial Nh.	Manufashurer Lan Server Non-	O CLANTRY	109		E Atstitute D	Resident	Vicia.	
STORACE	S#CANNOND107000001	CN-2024-PH007N1	1.00	EA	13	BATTERYLEH	E	3	
STORAGE	Secaracteristronomia	CN 2024 PE00740	1.00	FA	-1	COLOR		Only	
STORAGE	Sec analysis (1970)	CN 2024 PROTEINS	1.00	-	1	STORAGE		64 G8	
STORAGE	Second With Second	CN-2024 PROTING	1 20	FA	. 8	YEAR	8	2024	
STORAGE	SHCANNON0107000005	CN-2024-PR007NS	1.00	EA					
STORAGE	5#CANNON0107000006	CN-2024-FR007M8	1.00	EA					
			11						

Figure: New button and column in the Line Details dialog box

# Viewing and Modification of Lot or Serial Details for a Stock Item

The *Lot/Serial Details (IN209600)* form has been added (see the following screenshot). On this form, the user can do the following:

- In the Summary area, view the information related to a particular unit of a stock item with a lot or serial number (such as the expiration date, the manufacturer's lot or serial number, or the short description of the item).
- On the Attributes tab, view and modify the attribute set and values and upload an image of the item unit.
- On the **Description** tab, add or update an extended description of the item.
- On the **History** tab, review the history of related inventory documents.

VCAMERA1 S#CANNON0107000001 ↔ 0 0 0 0 0 K < > > H		[] NOTES	PAESIN	OUSTOMIZATION	TOOLS +
Investory ID VCAMERAT - Voles carriers Caron Xr. D     Securitization from Securitization Control Contro Control Control Control Control Control Control Contro Control C	Latr Senal Dave Exproy Date Description	SHEWITR Service No. Wh			
Afrikutes	inge	(Sales) at cease is taking		(Prowne)	Upined
E Atribute D Registred Vices		12200			
MATTERVLEM (7) 3		05			
STORAGE DI BACK		-	Sec.		
YEAR E 2004			100		
			1	3	

Figure: The Lot/Serial Details form

The user can open the *Lot/Serial Details (IN209600)* form by using the *Lot/Serial Details (IN2096PL)* list of records (see the following screenshot). Its link is available in the **Inventory** workspace under the **Profiles** category. The list of records shows all the lot- or serial-tracked item units that are in stock or have been issued from the warehouse and have the following settings specified on the *Lot/Serial Classes* (IN207000) form:

- Tracking Method: Track Lot Numbers or Track Serial Numbers
- Assignment Method: When Received

By clicking a link in the **Lot/Serial Nbr.** column, a user can open the record with that number on the *Lot/Serial Details* form.

Lot/Serial De	taits H 8				0	USTOMEDATION +	toous +
Insentory (D) Cont	ans CAMERA			Y	s		p
Tr incentory Q	* Lot Berial Mint	Manufacturer Last Decial Nor	Lot Secol Close	Gty Analighte	Qts. On Hand	Oty Analable for Unigeing	Eurone Des
> YCANERAL	5+CANNON0127222221	CN-2004-PR507N5	SBEATER	1.00	11.00	1.00	
VCAMERAL	5+CANNON0107000002	CN-2024-PR007N2	SPENDER	1.00	1.00	1.00	
MCAMERA1	Secondonins7000000	CN-2024 PROTINI	SRENTER	1.05	1.00	1.00	
WGAMERAL	SHCANNONCHERODOON	CN-2024 PR007N4	SRENTER	1.00	1.00	1.00	
WCAMERAL	SecAntronomini Toppoos	CN-2024-PR007N5	SBENTER	1.00	1.00	1.00	
XCAMERA1	SHCANNON0127000000	CN 2004-PR007N6	SHENTER	1.00	1.00	1.90	
WGAMERIAL	SecAnhonicational	CN-3024-PR007N7	SHENTER	1.00	1.00	1.00	
VCAMERAL	Sec Anni Calorid Topologi	CN-3024-PRODINE	SRENTER	1.00	1.00	1.00	
XCAMERAL	5eCANNON0107000009	CN-2024-PR007N9	SHEWTER	1.00	1.00	1.00	
YCAMERAL	54CANNON0107000010	CN-3024-PR00TN10	SRENTER	1.00	1.00	1.00	

Figure: The Lot/Serial Details list of records

#### Deletion, Addition, and Updating of Lot and Serial Attributes

If a user adds or deletes attributes for a particular lot or serial class on the *Lot/Serial Classes* (IN207000) form, the system adds or deletes them for each existing item of this class. Also, if the user changes the state of the **Active** or

**Required** check box for an attribute in the lot or serial class, the system changes the state of the respective check box for all the items of this class.

A user cannot delete a lot or serial attribute from the *Stock Items* (IN202500) or *Lot/Serial Classes* form if at least one item unit with a lot or serial number has been received to stock and values have been specified for its attributes.

#### Selection of a Lot- or Serial-Tracked Item in Documents

On the *Sales Orders* (SO301000), *Issues* (IN302000), *Adjustments* (IN303000), and *Transfers* (IN304000) forms, the **Add Lot/Serial Nbr.** button has been added to the table toolbar of the **Details** tab (see below). The button is available for a sales order with the *On Hold* status or *Open* status (if approvals are not configured for the order type).

SO 000178 -	ABC Hold	ings it	ic i					Divoration Act	write must	CURTOMONTON	100.8 *
4.0.0	0 1	+ 1	1 D - K	( )	N QUOKA	00235	CHEATE SHIPMED	HOLD			
Oxfor Type     Done-Tage     Status     Status     Core     Core	90 000178 Open 1/10005 1/10008	A A 10 0	+ Currenty + Luceber Currenty - Propert Descention	ABCHCLONG MAR Primay USD JF 110 K. Non-Prima Sele of Cenery	ABC Heatings he Lacation - VEW Come CAME		Orlaner Oly Deal Trias Line Decaration Decarater Dec Progra Trias Triaster Trias Decarater Trias	2 m 1405 m 1			
DEBIES	with the	-	cres insulation	a. Surra	ACCESSION OF		tarti Derviti	es mutorisés	eveneses.	an arcwa	18
0 + /	× 4	dig nite	MI ADD MATH	IX ITEME	100	18,000	HOUME LINEDE	144.5	CM ANALABILITY	ADD LOTIBORIAL N	100 T
B E D them		-	E Battern Tame	Firstinate	Lisa Descripto		-100	Same Sylver	Coart Dip	in Pas	Bai Mea

Figure: The Add Lot/Serial Nbr. button on the Sales Orders form

A user clicks the button to open the **Add Lot/Serial Nbr.** dialog box (see the following screenshot). In the dialog box, the user can view item availability and select item units with particular lot or serial numbers.

SC 000178 -	ADC 16	oldinga k + 1		- н		-			0	N/113 _ AC	SALAR	1.968.7.2	2,87084040	w 1003 +
+Description Description	au conta	-		-	NO-CHI	MCromp m P	/ Committee	12						-
Ant.	CH MAR	2.2	ADDU	othesa	NDI.									
+ Com + Reconstruit Con Consistent Con Colorent Reserv	17.000	0.0	10	-	-	eral bla: Alber Report /F	140	S the based on the						
	-		-	-		Lot Design from	Research.	incide:		-	-	No. OF	Academic	Di Assista As Digary
		-	100	1.00	VORENT:	BRUNNERSTONEY	CH 201 PROTECT	View Carles Carlot Mill	HERE'	INTORAGE.	14	100	1.685	1100
N. P. M. Channel			10	1.00	VOAHERAN	because control models	chatan motimal	William Carrierte Carroni (AMIC	101106	<b>BECRIFICE</b>	1.0	1.00		100
				10	VORISING	BRCHINCHER (TWODE)	0101010-00000000	View Cartains Cartain (MRI)	NOM.	1109408	10.	100	1.00	1.00
				8.00	VOAHERAN	INCOMPONENT/17000004	Childine Photobas	1080 Carley Carol AND	RETR.	0106408	44.	1.00	144	1.08
				6.00	VOAHERAN	Sec.aeveche=07000008	Children Presme	New Career Carel AMD	ARTHS .	BTOHAGE	14	1.04	148	100
				1.00	VORIENT.	Inthencient/100008	012047480746	Were Defend Laner Well	NOM.	BEDRADE	14	100	1.00	110
				5.00	VORMERAN	Section Characterization	Challen Photos	1000 Carley Carol AMD	46146	STOWAGE	- 64	100	1.80	100
			1.000			_		_	_		-			
														. 9 . 91
_												IAND, H	INC MALENCE	of texts

#### Figure: The Add Lot/Serial Nbr. dialog box

The table in the dialog box displays columns with attribute values specific for an item unit with a particular lot or serial number (see the following screenshot). In the **Search** box, the user can search for item units with lot or serial numbers by attribute values. The user can filter data in the table by the values in attribute columns.

When the user adds an item unit with a lot or serial number to the sales order, the system allocates the item unit with this lot or serial number for this order. The system will insert each item unit with a lot or serial number in a separate document line.

and the second		P. 11										
	H #											
alary the	Straffered Mr.		-	-	Ξ.	-		No. in case of the local division of the loc	-	-	111	and a
incrision.		Hard Linese Linese AMU	NO.	Alternal Street	64	100	1.16	.10	Ban.	204	1.1	anim.
HONROR.	these market	Their Linimiz Carol AME	mittes.	AT DALE		1981	14	146	Ben .	224		14.28
Incainteni.	choise-minted	Trans Lances Carlos AND	40.744	(CAN)	18	100	144	. Lot	Red.	101		-
MANNE.	the state office has	the laws law MI	ALC: NO.	17,948	14	100	1.146	1.00	Perch.	path4		-
Manufest.	Children Hartest	Trend Larres Tanon MARE	ing they.	(TAK)	- 14	1.05	1.00	1.10	frame.	2014		m10
Sectored .	casto-market	Title (anno Linte AM)	NO.	170AU	18	1.07	1.00	100	free .	10.04		84.08
wcenole .	CARD-MILLING	The lates law lat	80784	-17100-02	14	100	14	100	(base)	6014	. 1	84.10
			_	_								_

Figure: The item-specific serial attributes

# Inventory and Order Management: Receive Transfer Mode of the Receive and Put Away Form

When items are transferred between warehouses, warehouse personnel may work with the following documents:

- A transfer order, which is an order with the *Transfer Order* automation behavior created on the *Sales Orders* (SO301000) form
- A transfer shipment—that is, a shipment of the Transfer type created on the Shipments (SO302000) form
- A transfer receipt—a purchase receipt of the *Transfer Receipt* type created on the *Purchase Receipts* (PO302000) form

In previous versions of Acumatica ERP, a warehouse worker could not create a transfer receipt when they were receiving and putting away items by using the mobile app. Instead, the warehouse manager had to create the transfer receipt in the system and provide it to the worker. Also, for the worker to put away the items, the manager had to create a separate inventory transfer. These restrictions in operations resulted in extra work, increased the risk of document errors, and caused processing delays.

Starting in Acumatica ERP 2025 R1, a warehouse worker can transfer items from the source warehouse to the destination warehouse by using the mobile app. They can create a transfer receipt based on a delivery document, such as a transfer shipment or transfer order. Multiple warehouse workers can now receive one transfer shipment if it includes different items. After a receiver releases the transfer receipt, they can put away the received items.

Warehouse workers can receive and put away inventory items by using a barcode scanner or mobile device for scanning if the *Receiving* feature is enabled on the *Enable/Disable Features* (CS100000) form.

The following sections describe the changes related to this functionality in Acumatica ERP 2025 R1.

## Changes to the Purchase Orders Preferences Form

On the **Warehouse Management** tab of the *Purchase Orders Preferences* (PO101000) form, the **Display the Receive Transfer Tab** check box (shown below) has been added. If this check box is selected, users can process transfer receipts by using the *Receive and Put Away* screen of the mobile app or the *Receive and Put Away* (PO302020) form.

Purchase	Orders Preferences	CUSTOMIZATION	TOOLS .
0			
GENERAL	MAILING & PRINTING. WAREHOUSE MANAGEMENT		
These settings	are specific to the current branch.		
RECEIMING W	ORKELOW		
	Display the Receive Tab		
	Cisplay the Put Away Tab		
	C Display the Return Tab		
	Display the Receive Transfer Tab		
	Display the Scan Log Tab		
RECEIVING SE	TTINGS		
	Use Default Quantity		
	Use Explicit Line Confirmation		
	Subse Single Receiving Location		
	Use Default Receiving Location		
	Request Location for Each Item on Receiving		
	Request Location for Each Item on Putting Away		
	Request Location for Each Item on Returning		
	Verity Receipts Before Release		
	Keep Zero Lines on Receipt Continnation		

*Figure: The new check box* 

# Changes to the User Profile Form

On the *User Profile* (SM203010) form, the *Receive Transfer* option (shown below) has been added to the **Receive and Put Away** box on the **General** tab. If a user selects this option, the default mode on the *Receive and Put Away* (PO302020) form for this user will be Receive Transfer. The system will apply this change the next time the user signs in.

Jser Profile		D NOT	ES FLES	CUSTOMZATION 1
GENERATE ACCI	ESS CODES VIEW CONNECTED APPLICAT	tions		
GENERAL INFO EMAL BET	TINGS DELEGATES CUSTOM LOCALE	FORMAT	EXTERNAL (	DENTITIES DEVICE
USER SETTINGS				
+ Login:	admin			
First Name	Maxwell			
Last Name:	Baker			
Phone				
• Email	administrator@acumatica.com	12	CHA	NGE EMAL
+ Password			CHANG	E PASSWORD
Password Recovery Question	Why?		CHAN	GE ANSWER
Communit	Administrator	2		
PERSONAL SETTINGS				
Time Zone:	(GMT-08-00) Pacific Time (US & Canada)	1.14	RESET TO DE	EFAULT TIME ZONE
Default Branch:	PRODWHOLE	,p		
Default Branch Location:	BRONX - Bronx Location	,p		
Default Service Order Type:		ρ,		
	Select Service Order Type on Creation from C	alendara		
Default Warehouse	WHOLESALE - Wholesale Warehouse	p		
Home Page:	Customer View	Q,		
	Lookup Box Suggestions			
Pacejet Workstation ID				
DEFAULT AUTOMATED OPERAT	IONS			
Pick, Pack, and Ship		-		
Receive and Put Away	Receive Transfer	-		

Figure: The new option in the Receive and Put Away box

A user can open the *User Profile* form by doing the following:

- 1. Clicking the User menu button in the top pane of the Acumatica ERP screen
- 2. Clicking My Profile on the User menu

## Changes to the Receive and Put Away Form

i

On the *Receive and Put Away* (PO302020) form, the **Receive Transfer** tab has been added (see the following screenshot). This tab lists the lines of a purchase receipt with the *Transfer Receipt* type.

Receive and P	Put Away				FLES	CUSTOMER	non to	ols •
C O RES	ET USER SETTINGS	REMOVE	SET OTY	RELEASE RECEIP	т			
Scan Riscopt Nor	PR002471			The Receive Transfer & AACOMPYTER & 1 EA Scan the barcode of th	node is in use added to transfer receipt i den.			•
6 H 8								
B Inventory ID	Transaction Deact	Lociteral Ner	Expire Date	dan. Warehouse	Leceler	Received Ots	Remaining Gty	NON
-	Rangel and the Company			-	ATOMACE	1.00		**

Figure: The Receive Transfer tab

The tab is shown if the **Display the Receive Transfer Tab** check box is selected on the *Purchase Orders Preferences* (PO101000) form and a user has switched to Receive Transfer mode by scanning any of the following:

- The @potransfer command
- The transfer receipt number (if the transfer receipt has already been created)

On the *Receive and Put Away* form, in Receive Transfer mode, a user can create a transfer receipt by scanning the number of a transfer shipment or transfer order. By default, the system creates the new transfer receipt with the *On Hold* status. The **Receive Transfer** tab has no lines from the newly created transfer receipt. Each line is added automatically by the system after a user has scanned the barcode of the item to be received.

Also, the system now automatically switches between Receive, Return, and Receive Transfer modes on the *Receive* and *Put Away* form based on the type of the scanned purchase receipt. For example, if Receive mode is in use and a user is scanning the number of a transfer receipt, the system automatically recognizes the type of the document and switches the mode to Receive Transfer so the user can process the transfer receipt.

#### **Changes to the Purchase Receipts Form**

On the *Purchase Receipts* (PO302000) form, the **Put Away** tab now appears for a receipt of the *Transfer Receipt* type. It lists single-step inventory transfers created in Put Away mode on the *Receive and Put Away* (PO302020) form for this purchase receipt (see the following screenshot).

Puchase Receipts Transfer Receipt PR002	471 - Products Reta	a De	OTES ACTIVITIES	FILES CUSTOMIZATION	TOOLS +
6 □ □ + 0	р ∥ 0 ч К	< > >	ENTER LANDER	D COSTS	
Type Transfer R Recept Nor. PR002471 Status Released Date 12/30/3024 Post Penad 12/2024 DETAILS PUT AWAY	Wantouse Wongoup Owner LANDED COSTS 0TH	RETAL - Rotal Wa	rehouse	Control City	10.00
O H B	2007			1000	
E C D Reference Noc	Status	transfer type	Perios	d Warehouse	Total On-
> 0 D 002473	Released	1-Step	12/30/2024 12-202	24 RETAIL	10.00

Figure: The Put Away tab

## **Changes to the Shipments Form**

On the *Shipments* (SO302000) form, the **Receipts** tab has been added (see the following screenshot). The tab appears only for shipments of the *Transfer* type and lists all purchase receipts of the *Transfer Receipt* type created for the shipment. On this tab, a user can click links to the related transfer receipts and check which items in these receipts have been received at the destination warehouse.

SH006078 - Proc	Jucts Retail					D NOT	ES ACTIVITI	ES FILES	100LS •
+ 5 E	o + 🗉	K K	> >!	+++					
Thepman Nor SH Type Te Status Do Operator Has Shipment Date 12	nsiller mpleted 30/2/124	Warehouse II To Warehous Workgroup Owner	Michael A	ALE - Wholesa Retail Warehov ndrews	ie Warehouse ne	Ste Ste Pac Pac	ped Quant ped Weight ped Volume kapes. kape Weight	13.00 35.360000 39.000000 2 27.280000	*
Description Tes DETAILS ORDE	nuller of leptop cor RS RECEIPT	noviers for the s	eles order to Al	SSES 74	OKAGES				
0 H 8									
E Receipt Type	Receipt Nor	Status	"Dete	*Pest Period	Techi Orp	*Warehouse	Inventory Dec	Type Pro	entary Ref. Nor.
Transler Receipt	ER002471	Released	12/30/2024	12-2024	10.00	RETAIL	Recept	00	2471
Transler Receipt	PR002472	On Hold	12/30/2024	12-2024	3.00	RETAIL			

#### Figure: The Receipts tab

A user can click the link in the **Receipt Nbr.** column to open a transfer receipt on the *Purchase Receipts* (PO302000) form only if the user has access to the destination warehouse.

## **Changes to the Shipment Confirmation Report**

In the *Shipment Confirmation* (SO642000) report, the barcode of the corresponding shipment number has been added (see the following screenshot). By scanning the shipment barcode, a warehouse worker can start processing the corresponding transfer receipt on the *Receive and Put Away* (PO302020) form.

			Ship	ment Con	firma	ation
4	Acun	natica	Reference Number: Date: Customer ID:	SH006078 12/30/2024 PROORETAIL		
Prod 1123 Suite Belle Phon Web	ucts Wholesale 5 SE 6th St. 140 vue, WA, 98004 e: 206-555-1212 www.revisiontwo.com					
SHIP	TO:		NOTE:			
2901 Seat Unite Attn:	Utah Ave S le WA 96134 d States of America Warehouse Manager					
CONT	TACT	SHIP VIA	FOB POINT		WAREH	OUSE
Micha	el Andrews				WHOLE	SALE
50 T	YPE	SO NUMBER		CUSTOMER P.O. NO.		
TR		000179				
NO.	ITEM		QTY. UOS	ary, si	<b>IPPED</b>	QTY. B/O
1	AACOMPUT01: Acer La	iptop Computer	10.00 EA		10.00	0.00
2	ELECOMP2: Lenovo las	ptop computer	3.00 EA		3.00	0.00

Figure: The barcode of the shipment

#### Processing of a Transfer Receipt on the Receive and Put Away Form

Starting in Acumatica ERP 2025 R1, warehouse workers can receive multiple transfer receipts for one transfer shipment simultaneously and put away items from these transfer receipts.

Suppose that goods (computers and monitors) should be transferred from a source warehouse to a destination warehouse. A user creates a transfer order on the *Sales Orders* (SO301000) form and processes the related transfer shipment on the *Shipments* (SO302000) form. The system generates and releases the inventory transfer that issues the items from the source warehouse to the destination warehouse. The transfer shipment has the *Completed* status on the *Shipments* form. Now the goods can be received at the destination warehouse.

Further suppose that the shipment confirmation report has 10 computers and 10 monitors to be transferred to the destination warehouse. One warehouse worker is responsible for receiving the computers at the warehouse location for computers, and another warehouse worker is responsible for receiving the monitors at the warehouse location for monitors. The warehouse personnel can transfer items from the source warehouse to the destination warehouse by performing the following steps:

- 1. Warehouse worker 1 scans the shipment barcode in the *Shipment Confirmation* (SO642000) report. The system switches to Receive Transfer mode, creates the transfer receipt, and displays the **Receive Transfer** tab with no lines on the *Receive and Put Away* (PO302020) form.
- 2. Warehouse worker 1 performs the following operations to process the transfer receipt:
  - a. Scans the barcode of the location for computers at the destination warehouse
  - b. Scans the barcode of each computer that has been received
  - c. Releases the transfer receipt

When the transfer receipt has been released, warehouse worker 1 can put away the items.

3. Warehouse worker 2 scans the barcode in the *Shipment Confirmation* report. The system switches to Receive Transfer mode, creates the transfer receipt, and displays the **Receive Transfer** tab with no lines on the *Receive and Put Away* form.

- 4. Warehouse worker 2 performs the following operations to process the transfer receipt:
  - a. Scans the barcode of the location for monitors at the destination warehouse
  - b. Scans the barcode of each monitor that has been received
  - c. Releases the transfer receipt

When the transfer receipt has been released, warehouse worker 2 can put away the items.

#### **Duplicate Identifiers in Document Processing**

In Receive Transfer mode on the *Receive and Put Away* (PO302020) form, a user can scan the identifiers (that is, reference numbers) of such documents as transfer shipments, transfer receipts, or transfer orders. Although documents of a particular type (such as transfer receipts) have unique identifiers, documents of different types (such as a transfer receipt and a transfer order) can share the same identifier. When an identifier is scanned, the system searches in the following order until it finds a document with the identifier:

- 1. Transfer receipts on the Purchase Receipts (PO302000) form
- 2. Transfer shipments on the Shipments (SO302000) form
- 3. Transfer orders on the Sales Orders (SO301000) form

Suppose that the system has two documents with identical identifiers: a transfer receipt and a transfer shipment. If a user enters an identifier matching a released transfer receipt on the *Receive and Put Away* form, the system displays an error message indicating that the transfer receipt has already been released. This prevents further processing of the shipment with the same identifier.

To ensure unique identifiers and avoid issues with duplicates, we strongly recommend creating a separate numbering sequence with a unique prefix on the *Numbering Sequences* (CS201010) form for each type of document. This will cause identifiers to be unique across documents of different types.

## **Mobile App**

In the Acumatica mobile app, on the *Receive and Put Away* screen, the **Receive Transfer** button has been added under the **Change Mode** category (see the following screenshot). The button is available if the **Display the Receive Transfer Tab** check box is selected on the **Warehouse Management** tab of the *Purchase Orders Preferences* (PO101000) form.



Figure: The Receive Transfer button

On the More menu of the *Receive and Put Away* screen, the **Release Transfer** command has been added (see the following screenshot). The command is shown in Receive mode if the transfer receipt's items have already been received by a warehouse worker.

tode	The R	eceive T	Release	Receipt	
		HUDEH	Add Scr	een to Fav	orites
he	PR002	47116	Spreedur	and annu inte	m)7
	Guine				
-2014	NI KARE	ar a Chai			
Re	wiew		Reset	Sci	an
Re	wiew	ove	Reset	Sci	an
Re	wiew Remi	ove	Reset	Sci	an

Figure: The Release Receipt command

On the *Receive and Put Away* screen, if a user taps **Review** and then taps the item, the system displays the information about the received item, including the transfer order number and the transfer shipment number (see the following screenshot).

× Received Items	
Ader Laplog Computer	
Landonnalat Maler (	
Storage and receiving	
EA	
9,00	
Yumumuu koozii 1.00	
1 agummu n tana 4 1 f - f	
Translat Baar Min TR000129	
Turnitut la lanseat fau SH006578	
III 0 <	

Figure: The numbers of the transfer order and transfer shipment

# Limitations

In Acumatica ERP 2025 R1, multiple users cannot simultaneously process unreleased transfer receipts with partial item quantities on the *Receive and Put Away* (PO302020) form. However, if a user has created and released a transfer receipt with a partial item quantity, the remaining quantity can be received in another transfer receipt.

# Inventory and Order Management: Capturing Weights of Packages from DeviceHub

In previous versions of Acumatica ERP, the use of a scale connected to DeviceHub for weighing packages was limited to the scenario of packing shipments on the *Pick, Pack, and Ship* (SO302020) form. The users who added packages to shipments on the *Shipments* (SO302000) form could only type the weight of a package manually.

Starting in Acumatica ERP 2025 R1, users can capture the weighing result from DeviceHub on the **Packages** tab and in the **Shop for Rates** dialog box on the *Shipments* form.

This functionality is available only if the *DeviceHub* feature is enabled on the *Enable/Disable Features* (CS100000) form.

# Capture of the Weight of a Package on the Packages Tab

i

A user may need to specify the weight of a package on the **Packages** tab of the *Shipments* (SO302020) form while preparing a shipment for sending it to an external carrier service. To perform this operation, the user selects the package and clicks the new **Capture Weight** button on the table toolbar of the upper table on this tab (Item 1 in the following screenshot). If a default scale is specified for the user account, the system automatically inserts this scale's value from the **Last Weight** column on the *Scales* (SM206530) form into the **Weight** column on the **Packages** tab of the *Shipments* form (Item 2).

000069 - FourStar Coffee & Sweets Shop	Disc	st	ACTIVITIES FLEE	CURTOMONION TOOLE +
+ D D A + B K C > N COMPANIEMENT HOLD				
Dependence         Distance         Continue         COMPRESSION         Frankline College & States         //         States         ///         States         ///         States         ///         States         ///         States         ///         States         States	1 10 10 23 40000 1 23 40000 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			Î
0 + X CALINE KORAL BE	langer.	-	Magel Lover	-
- B D R LARGE Hand II	die	985	4.0	19 DODE
Contained Markage				1.1.1.1

Figure: Capturing the weight of a package on the Packages tab

## Capture of the Weight of a Package in the Shop for Rates Dialog Box

A user may want to specify the weight of a package directly in the **Shop for Rates** dialog box on the *Shipments* (SO302000) form before they get the carrier rates. To perform this operation, the user adds the packages to the **Packages** table in the dialog box, selects a package, and clicks the **Capture Weight** button on the table toolbar (Item 1 in the following screenshot). If a default scale is specified for the user account, the system automatically inserts this scale's value from the **Last Weight** column on the *Scales* (SM206530) form into the **Weight** column on the **Packages** tab of the *Shipments* form (Item 2).

													5 ×
Die Carrie	in Re	The state	25.40000	echago Vreige	- 21	100000							
0	1.4	S.8.	REFRESH RATES	H III					Ave	laine Mark		1.4	Υ.
R 14	decided	E Com			Descrip	dige.				Antonio	Days - Trans	n Dalive A Dale	*
Packs	uper												
Packe	upes +	×	CAPTURE VIDENT	<b>1</b> ×									
Packet O R B	ages + D	× 1	CAPTURE WEIGHT Bis December	<b>0</b> *	Lange	Reen	Telape Los UKI	1	Rept	Gen 1	1.1	Decis	1.0 Am
Packet O B B B	+ 0	- X 'Ber II LARGE	CAPTURE VECONT Bio Countries Large Bio	<b>1</b> 1 1 1 1	Lengt 12.00	anan 12.06	Finige Life UK	IN NO	Hergert NJ. 2528	2	Not Heater 16.2000	Decis Value 8.000	0.00 8.000

Figure: Capturing the weight of a package in the Shop for Rates dialog box

## Specification of the Default Scale for a User Account

A user can specify the default digital scale device to be used for their own user account on the *User Profile* (SM203010) form. In the **Personal Settings** section of the **General Info** tab, they specify a configured device in the **Default Scale** box.

# **Other Changes**

The use of a scale connected to DeviceHub prior to Acumatica ERP 2025 R1 required the *DeviceHub* and *Warehouse Management* features to be enabled on the *Enable/Disable Features* (CS1000000) form. Now it requires only the *DeviceHub* feature to be enabled.

# **Inventory and Order Management: Other Improvements**

In Acumatica ERP 2025 R1, improvements to inventory and order management processes and the UI have been introduced, as described below.

# Removal of the Advanced Availability Validation Check Box From the Sales Orders Preferences Form

In Acumatica ERP 2025 R1, the **Advanced Availability Validation** check box has been removed from the *Sales Orders Preferences* (SO101000) form. If the **Allow Negative Quantity** check box is cleared on the *Item Classes* (IN201000) form, it will no longer be possible to do either of the following if it would cause the actual quantity of an item of the class to become negative:

- Confirm a shipment that contains the item
- Save a sales order with the Invoice automation behavior that contains the item

# **Inventory Planning: Forecast Consumption Visibility**

In Acumatica ERP, the forecasted demand is included in inventory planning workflows. Forecasts can be set up based on historical sales data, seasonality, or other business-specific patterns and can be adjusted for various factors, such as promotions or anticipated demand spikes. These forecasts provide insight that managers can use to determine replenishment strategies so that inventory levels are optimized to avoid stockouts or overstock. As such, the forecasts help companies to maintain balance in inventory-carrying costs and to meet customer demand efficiently.

When a forecast is marked as dependent, Acumatica ERP automatically reduces the forecasted quantity by the quantity of items in sales orders and excludes the consumed forecasted quantity from inventory planning. By using dependent forecasts, companies can reduce the risk of over-ordering and producing excess inventory that may not be needed.

Previous versions of Acumatica ERP did not provide the ability to easily compare the forecasted demand with the actual demand for dependent forecasts, so planning managers had to create custom reports or generic inquiries. In Acumatica ERP 2025 R1, a side panel has been introduced on the *Forecast* (AM202000) and *Forecast Listing* (AM000005) forms to improve the visibility of the actual demand during particular forecast intervals. The tabs of the new side panel of this form are described in the following section.

The forecasting functionality is available only when the *Distribution Requirements Planning* or *Material Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.

# Side Panel on the Forecast and Forecast Listing Forms

A side panel has been added to the *Forecast* (AM202000) and *Forecast Listing* (AM000005) forms with the **Forecast** vs. Sales and Forecast vs. Sales Details tabs. The following screenshot shows these tabs on the side panel of the *Forecast* form. On these tabs, the system displays data from the *Forecast vs. Sales* (AM404100) and *Forecast vs. Sales Details* (AM404200) inquiry forms, respectively. These inquiry forms have been added to the site map and are available in the **Inventory Planning** workspace.

Fo	re	cast ∷ ∩ +	× o -	н ю з	t V				C.	STOMEATION	TOOLS -	0 ja
æ 6	1	D Porecast ID	Inventory ID	*Warehouse	Interval	Quantity	*UOM	*Bogin † Gato	*End Date	Dependent	Active	Lane I
6	1	D FCST000009	AACOMPUT01	WHOLESALE	Manthly	1,000.00	EA	9/25/2024	10/24/2024	R	B	
	. 1	D FCST000005	AACOMPUTOT	RETAIL	One Time	2,455.00	EA.	10/24/2024	10/23/2025	R	8	
	1	D FCST000006	AACOMPUTOI	WHOLESALE	One Time	9,385.00	EA	10/24/2024	15/23/2025	E	E	
4	. 1	D FCST000007	AACOMPUTOT	WHOLESALE	Monthly	1,000.00	EA	10/25/2024	11/28/2024	R	B	
> 6	1	C FCST000008	AACOMPUT01	WHOLESALE	Monthly	1,000.00	EA	11/29/2024	12/28/2024	R	8	
	1	D FCST000010	AACOMPUTOL	WHOLESALE	Monthly	1,000.00	EA	12/29/2024	1/28/2025	8	B	

#### Figure: The tabs of the new side panel on the Forecast form

For each forecast selected on the *Forecast* or *Forecast Listing* form, a planning manager can open and expand the **Forecast vs. Sales** tab to see the forecasted quantity, the ordered quantity, and the quantity variance for each forecast interval. (See the following screenshot.)

F	ion	oca	st	× ov	ij O	Fr d	recent vs. Sale o vo H	я	V					C ×
1		D	Fermant ID	Inventory ID Y	di	and a	Forecast ID		FCST000008	AACOMPUTEI				
		D	FCST00000	ANCOMPUTER	Denni Dennite	-	Previousland Gay	UOM	Actual Qtp	City, Variance	investing 83	Warshouse	Bart Date	End Date
	÷	D	FCST000005	MCOMPUTER		3	1,000.00	\$A.	220.00	788.00	AACOMEUTE!	WHOLESALE	11/29/2824	12/28/2024
	4		FCST000006	AACOMPUTE:										
	4	D	FCST000007	AACOMPUTE										
>	\$	0	FCST00000E	AACOMPUTED										
	6	D	FCST000018	AACOMPUTE!										

#### Figure: The Forecast vs. Sales tab on the side panel

To explore which sales orders consumed the forecasted demand, the planning manager can use the **Forecast vs. Sales Details** tab, which is shown in the following screenshot. The table on this tab lists all sales orders that have been created for the item during the forecast interval selected in the Selection area, along with the ordered quantities and additional details from the corresponding sales order lines.

Forecast	custowskinow tools -	® ⊒	1	D H B	en liecon E V							0 ×
0 =	• + × ···	-		Fancati D • Time Fallet	FORTBURN MONORIO		Parastel ( P Adult (9)		200 M	EA EA		
6 D 10	LILLANDON RECORD		-	'onlie igne	crose No.	Linkson	Costroler Rette	Presented bit	980.04	Schol, Museum 1 Tele	Onlined (2)	Marchel Liper
& D. HI	alamma AACCAMALUS		÷	90	000129	AACESTOMEN	Abahan	12102/018	1010004		100.00	
B D re	STREETS AACOMPUTER			50	805285	CARIDIDEAN	Caribbean Secs.	12102638	125/2024		120.00	-
B D PC	STREET ACCOMPLETE		1									
P & D PC	STREEME ANCOMPLETE											
& D HD	arteeven According											

*Figure: The Forecast vs. Sales Details tab on the side panel* 

i

For ease of comparison, the ordered quantities displayed on the **Forecast vs. Sales** and **Forecast vs. Sales Details** tabs are converted to the forecast's unit of measure.

# Inventory Planning: Improved Traceability of Demand and Supply

The *Inventory Planning Results by Item* (AM404000) form is a key tool for schedulers and planners to review and interpret inventory planning suggestions before taking action.

In previous versions of Acumatica ERP, labeling inconsistencies across the Inventory Planning forms made it difficult to identify document IDs responsible for quantity changes. Additionally, the lack of clear references to demand or supply documents and the absence of details on consolidated demand records further complicated the interpretation of inventory planning data.

In Acumatica ERP 2025 R1, the following updates have been made to improve demand and supply traceability and enhance consistency between related inventory planning forms:

- The following new columns have been added to the table on the *Inventory Planning Results by Item* form:
  - **Related Product Document**: Displays the reference number of the demand document that contains the parent item of the top level. This preserves the ability to view the top-level document for certain generated supply and demand records, maintaining consistency with existing terminology.
  - **Consolidation ID**: Displays the identifier of the consolidation record either for a demand record included in a consolidation or for a generated supply record created to meet the demand of a consolidated record, allowing users to trace which demand records were consolidated into a single supply record. This column is available only if the **Use Days of Supply to Consolidate Orders** check box is selected on the *Inventory Planning Preferences* (AM100000) form.
- The **Related Document** column on the *Inventory Planning Results by Item* form now shows the ID of the document responsible for increasing or decreasing inventory quantities, providing insights into the supply and demand documents influencing inventory changes for specific items.
- The **Generated Supply Document** column has been added to the *Inventory Planning Display* (AM400000) form. This column displays the system-assigned ID of the supply document generated by the inventory planning regeneration process, enabling users to easily relate the supply row on the *Inventory Planning Display* form to the corresponding row on the *Inventory Planning Results by Item* (AM404000) form.
- A new numbering sequence that uses the *PLPO* prefix has been introduced for inventory planning-generated purchase orders, ensuring consistency with other generated plans, such as planned production orders, consolidation suggestions, planned transfer orders, and planned kit assemblies, all of which are created and stored with unique IDs.

# Localization (Canada): RBC ACH094 Plug-In for International Payments

In previous versions of Acumatica ERP, users could export batches of AP payments via the Automated Clearing House (ACH) plug-in, which works for domestic payments in the United States. Acumatica ERP also supports the CPA005 plug-in for domestic payments in Canada. These plug-ins do not support the International ACH Transactions format and cannot be used for cross-border payments between Canada and the US.

In Acumatica ERP 2025 R1, the Royal Bank of Canada (RBC) ACH094 plug-in has been added to export AP payments in the National Automated Clearing House Association (NACHA) ACH094 format for cross-border payments from a USD account residing in Canada to a USD account residing in the United States. The plug-in appears in the system if the *Canadian Localization* feature is enabled on the *Enable/Disable Features* (CS100000) form.

The following sections describe the UI changes and changes in document processing to support this functionality.

#### **Changes to the Payment Methods Form**

On the *Payment Methods* (CA204000) form, the following changes have been made:

- In the **Direct Deposit File Format** box, the *RBC ACH094* option has been added (Item 1 in the screenshot below).
- In the **Export Method** box, the *RBC ACH094 Plug-In* option has been added (Item 2). The system automatically inserts this option when *RBC ACH094* is selected as **Direct Deposit File Format**. On the **Remittance Settings** tab, the settings for the specified export method are filled in automatically.

ACH094					C HOURS	ACTIVITIES	FALSE CUSTO	MONTON 1	00.8 +
* 5 5 4	о + ≡ 0 + к	< > >	÷						
+ Payment Walkast (D		P Shein	AP All	Sar Payment Data to Bank Transaction Data Despite Terretarian Information for Cash Acc	out :				^
Moans of Pagment	Direct Deproit	- Divert	11						
Dest Deput Fis Fis	RECACHERA	-0							
+ Description	ACHINA								
ADDITIONAL PROCES OF VIEW Chanks Chank Respired Of then Respired	949	Espost State	4	BBC.ACHION Play In State Payments with Ziros Annual Players Batch Tag, Nuclear Players Batch Payment Batcs					
Payment Method Details									
0 + × +	4 00								
8 8 D 10 04	ciptur .	Present.	- And	Entry Mass	Validation Reg. Eng.	Canad	Type:	Televit Ve	1
					AND DO AND THE REAL				
	colver Name	12			distant role	100			
6 D 3 Pe	calver Name calving (IF) Routing Number	8		00000000	-16/81	Test			1
6 0 1 Pe 6 0 2 Pe 6 0 3 Ac	calver Name calving (2F) Routing Namber count Namber	22 23 25	2 3		-40.174	tar Tar			1

#### Figure: UI changes on the Payment Methods form

On the **Plug-In Settings** tab, the system automatically inserts the default settings for this plug-in (shown below), which the user can override.

Payment Methods ACH094			D NOTES	ACTIVITIES	FLES	CUSTOMIZATION	100L5 +
6 2 2 0 4		> >1					
+ Payment Method ID Ad	DH094 P	Une in AP	Set Payment Date to Bank Transaction	Date			2
0	Addres	Director All	Require Renditance Information for Ca	ah Account			
Means of Payment De	rect Depenit +	Use in PR					
Direct Deposit File Fat. Rd	DC ACH094 -						
+ Description AC	CH894						
ALLOWED CASHACCOUNTS	RETTINGS FOR USE IN AP	REMITTANCE S	SETTINGS PLUG-IN SETTINGS				
D hanne	-						
Council Continue	teor.						
Incluite Renalizance Addenda Record	a.						
Waymant Related Information	+ Concat('Inv" [Bill InvoiceNbr], '11)						
Block Filter	9						
File Header Record							
*File ID Modifier	AZ.09						
Batch Header Record							
*Service Class Ends	228						
*Mansland Entry Class Circle	IAT .						
Company Entry Description	Payment						
*Organization Monthloadium; Number	Originator Identification Number						
Company Name	Company Name						
Mighamir NewsCAddress	Originator Street Address						

Figure: The settings of the RBC ACH094 plug-in

#### Setup of the RBC ACH094 Plug-In

To set up the RBC ACH094 plug-in in the system, an administrative user performs the following actions:

- 1. On the *Payment Methods* (CA204000) form, creates a payment method, selecting *Direct Deposit* in the **Means** of **Payment** box.
- 2. In the **Direct Deposit File Format** box for the payment method, selects *RBC ACH094*.

The system automatically inserts *RBC ACH094 Plug-In* in the **Export Method** box on the **Settings for Use in AP** tab.

- 3. On the **Remittance Settings** tab, specifies the remittance settings for the cash account. These settings are filled in for the cash account on the **Remittance Settings** tab of the *Cash Accounts* (CA202000) form.
- 4. On the **Settings for Use in AP** tab, specifies or adjusts the payment details with the vendor's settings. These settings are filled in for the vendor on the **Payment** tab of the *Vendors* (AP303000) form.
- 5. On the Plug-In Settings tab of the Payment Methods form, reviews and adjusts the plug-in settings.

# Localization (Canada): Support of T4A Reporting

Previous versions of Acumatica ERP did not support the generation of the T4A report (also known as a Statement of Pension, Retirement, Annuity, and Other Income) and its electronic submission to the Canada Revenue Agency (CRA).

Acumatica ERP 2025 R1 introduces support for the generation of the T4A XML file and its electronic submission to the CRA. This functionality is available in the system if the *Canadian Localization* feature is enabled on the *Enable/ Disable Features* (CS100000) form.

The following sections describe the UI changes made to multiple forms and changes in document processing to support this functionality.

## **Changes to the Vendors Form**

On the Vendors (AP303000) form, the following changes have been made:

- On the More menu, the following commands have been removed from the **Vendor Management** section: **Enable T5018 Reporting** and **Disable T5018 Reporting**.
- On the General tab, the T5018 Vendor check box has been removed from the Vendor Properties section.
- The **CRA Reporting Type** box (Item 1 in the screenshot below) has been added to the **Vendor Properties** section. This box contains one of the following options:
  - None (default): This value is specified when the Canadian Localization feature is enabled.
  - *T5018*: If a user selects this option, users will be able to mark lines of bills or prepayments as T5018. The lines of these bill payments and prepayment will be included in the vendor's T5018 amount.
  - T4A: If a user selects this option, all the released payments are included in the vendor's T4A amount.
- If T4A is selected in the CRA Reporting Type box, the following boxes appear on the form:
  - **T4A Box** (Item 2): The type of payment, which can be one of the following: *Box 20 Self Employed Commissions*, *Box 28 Other Income*, or *Box 48 Fees for Services* (default).
  - CRA Vendor Type (Item 3): The type of subcontractor (the former T5018 Box).
  - **CRA Payroll Account Number** (Item 4): A 15-character payroll account number for dealing with CRA. This box appears on the form if the **CRA Vendor Type** box is set to *Corporation* or *Partnership*.
- The **SIN** box now appears on the form if the **CRA Vendor Type** box contains *Individual*.

ACADOIT - Can D	10 K				D NOTE	FILES CUSTOR/2010	100LS +
4 B B 4	- 0 8 0 - X < 3	м					
+ Vender 10	ACADOIT - Carr Da N P	Delawa	0.00				^
Vendre Stature	Active -	Prepayment Balance	0.00				
+ Worder Class.	PRODUCT - Products Vendors 🦳 P. 🧳	Patalest Balance	0.00				
GENERAL FRAM	CAL PRIMENT PURCHARE DETTINGS	ATTINUTES LOS	ATONS CORDUCTS AS	CTWITEB		NAME AND A PROPERTY.	
ACCOUNTINFO		PRIMARY CONTACT		_			
+ Account Name	Can Do II	Auro.	Ether Housten				
ALapathana	Can Do 8	Jul Tite	VP Sales				
ACCOUNT ADDRESS		Enal	ehousman@candot.can	12			
	ADDRESS LOOKUP	Dustress 1 -	+1 (#16) 222 0878				
Address Line 7	50 Booth Ave	Cet ·					
Address Live 2		VENDOR PROPERTES					
Chy	Taranto		Charded Cost Vendor				
Tors:	ON - Cetario		Uverster in Tax Agency				
Pastal Code	MANE 2ND		10199 Vender				
+ Country	CA-Canada P		Citial Member in Service Mate	aperant			
ADDITIONAL ACCOUNT	TIMPO	CRA Reporting Type:	74A	- 0			
Business 1	+t (#16) 222-0677	+ 144.0ox	Box 40 - Fees for Services	- 0			
Bushess 2 -		+ CRA Vendor Type:	Corporation	. 0			
Fat -		+ CRA Payrol Account N.	\$23456789R719001	0			
Account Email							
Web:	6						
Ext Rel Ner							
Parant Account	P						

Figure: Boxes related to T4A reporting

#### **Changes to the Companies Form**

On the *Companies* (CS101500) form, the following changes have been made:

- The **T5018 Settings** section has been removed and the **CRA** section (Item 1 in the screenshot below) has been added instead.
- The CRA Payroll Account Number box has been renamed to Payroll Account Number (Item 2).
- The Program Number box has been renamed to Information Returns Account Number (Item 3).
- The Year Type box has been renamed to T5018 Year Type (Item 4).

PRODUCTS - Revision Ty	o Products		D HOTER	FILES-2D CUSTOMEDITION	TOOLS +
= + ~ = D	· ic c > >i …				
Company ID PROC Company Name Resta Company Type With I	UCTS in Tee Products ranches Requiring Datancing	D Status Addre			
COMPANY DETAILS BRANC	es severes upores	CANADIAN SAX REPORTING	VIEW APPENDANCE	COMPANY GROUPS	
CRA					
Transmitter Number	MM555555				
Payrul Account Notiber		0			
<b>T4 Reporting Contact</b>	3295 - Layla Beguncit	P			
Information Relative Account No.		0			
75018 Year Type:	Fiscal Year	- 0			
H11					
Menthiston Number					
File Number					
Quebec Enterprise Number					
Quebec Hamelithe Multiple					

Figure: UI changes on the Companies form

The Canadian Tax Reporting tab appears on the form is one of the following conditions is met:

- On the *Enable/Disable Features* (CS100000) form, the *Canadian Payroll* features is enabled and the *Canadian Localization* feature is disabled; also, the **File Taxes by Branch** check box is cleared on the *Companies* form.
- The Canadian Localization feature is enabled and the Canadian Payroll feature is disabled on the Enable/ Disable Features form. In this case, the system doesn't check the state of the File Taxes by Branch check box on the Companies form.
- The Canadian Payroll and Canadian Localization features are both enabled on the Enable/Disable Features form. In this case, the system doesn't check the state of the File Taxes by Branch check box on the Companies form.

#### **Changes to the Branches Form**

On the Branches (CS102000) form, the following changes have been made:

- The T5018 Settings section has been removed.
- The CRA Payroll Account Number box has been renamed to Payroll Account Number, as shown in the following screenshot.

PRODWHOLE - Prod	ucts Wholesale の 音 〇 ~ K く	Dimontes Picesici) customovinion too	
Branch ID     Branch Rame     Company	PRCOWHOLE P Products Wholesale PRCOUCTS - Revision Two Products	C Active	•
BRANCH DETAILS DE	UNERRY SETTINGS EXAPLOYEES		
CR4			
T4 Reporting Contact	123456-TENETODI2 3296 - Layla Beauvoir	P	
Identification Homber File Number Gostes: Entropoles Number Gostes: Transmitter Numbe			

Figure: UI change on the Branches form

#### **Changes to the Accounts Payable Preferences Form**

On the **Canadian Tax Reporting** tab of the *Accounts Payable Preferences* (AP101000) form, the following changes have been made:

- The T4A Settings section (Item 1 in the screenshot below) has been added.
- The **Threshold Amount** box (Item 2) has been added to this section. If the total of all released payments to a particular vendor is the same as or more than the threshold amount, these payments will be included in the vendor's T4A report.

Accounts Payable Preferences	D NOTES	FLES	CUSTOMIZATION	TOOLS -
0 0				
GENERAL PRICING APPROVAL	1999 SETTINGS MALING & PRINTING	CAN	ADIAN TAX REPORT	NG
TSO18 SETTINGS				
Threshold Amount 500.00	100			
T4A SETTINGS				
Threshold Amount 500 00	0 0			

Figure: UI changes on the Accounts Payable Preferences form

#### Changes to the Create T5018 E-File Form

On the Create T5018 E-File (AP507600) form, the following changes have been made:

- The Create T5018 E-File form has been renamed to Create CRA E-File.
- The **Tax Form** box (Item 1 in the screenshot below) has been added to the Selection area of the form. In this box, the user can select *T5018* or *T4A*.
- The **Transmitter** box has been renamed to **Payer** (Item 2) to be more in line with CRA documentation and business processes. If *T4A* is selected in the **Tax Form** box, a branch can be selected in this box if this branch belongs to a company with the Canada localization and the **File Taxes by Branch** check box selected.
- The **T5018 Tax Year** box has been renamed to **Year** (Item 3) so that it can be used for both T5018 and T4A reports. For a T4A report, the calendar year in always used.

Create CRA E-I	File			FILES	CUSTOMIZATIO	N TOOLS +
0 0 8	AMEND REPORT DO	WINLOAD B	E-FILE			
• Tax Form:	T4A	- 0	From.	1/1/2025		^
Payer	PRODWHOLE - Products	- 0	To	12/31/2025		
- Year:	2025	00				
Revision	1	,p				
	E-File Submitted to CRV	4				
Filing Type	Original					
Threshold Amount.	500.000000					
DETAILS SUM	AARY					
OHN						
E Wendor Ven	dor Name S2N	Prop	am Account Number	F4A Hos	Amount to Report	Report Type
ACADOIT Ca	n De R 0000000	00 123-	456789RT0001	Box 48 - Fees for Services	9.750.00	Original

Figure: UI changes on the Create CRA E-File form

Users can generate the original, amended, or canceled T4A e-file in XML format.

The following document types are included in the T4A report:

• *Payment*: A document created on the *Checks and Payments* (AP301000) form. The document amount is added to the T4A amount.

• *Prepayment*: A document created on the *Checks and Payments* form. The document amount is added to the T4A amount.

Prepayments without applications are included in the T4A report without any adjustments
 for the possible taxes. After prepayment applications are released, there will be enough data
 for the system to adjust the amounts. This means that the user will have to generate a new
 revision of the T4A report to get correct report amounts.

- *Refund*: A document created on the *Checks and Payments* form. The document amount is subtracted from the T4A amount.
- *Cash Purchase*: A document created on the *Cash Purchases* (AP304000) form. The document amount is added to the T4A amount.
- *Cash Return*: A document created on the *Cash Purchases* amount. The document amoount is subtracted from the T4A amount.

#### The New T4A Report Details Form

The T4A Report Details (AP407700) inquiry form has been added to the system.

This form shows a list of documents whose amounts are included in the selected revision of the T4A report.

#### **Other UI Changes**

The following UI changes have also been made:

- On the *Checks and Payments* (AP302000) form for the *Prepayment* document type, the **T5018 Report** section on the **Financial** tab has been renamed to **T5018 Reporting**.
- The new **CRA Reporting** section has been added to the **Payables** workspace. This section includes all the forms and reports related to CRA reporting.

# Manufacturing: Due Date Handling in Production Orders

In previous versions of Acumatica ERP, production orders created during the finite scheduling in advanced planning and scheduling (APS) did not retain the due dates of their linked or pegged demands. This could affect the production manager's confidence in the production schedule because tracking of potentially late production orders often involved manual effort, which could lead to errors.

In Acumatica ERP 2025 R1, a new box, **Due Date**, has been added in the **Scheduling Details** section on the **General** tab of the *Production Order Maintenance* (AM201500) form, as shown in the following screenshot. This box holds the date by which the production order is expected to be completed to ensure on-time delivery for the pegged demand.

RO AM000155 - Manufa	actured Item							
6 Q 0 0 0	+ ≝ D + K < >	Heat	Release Order	Production	Detail			
Order Type *	RO - Regular Orders O,	Inventory IC	54	AM9000 - M	fanufactured item		- Q,	
Production Nor.+	AM000155 0,	City to Proc	iuce		10.00	EA	0,	
Status	Flanned	Description		Manufacture	ed item			
Order Date *	10/9/2024							
GENERAL REFERENCE	S RELATED PRODUCTION EVEN	NTS ATTRIB	UTES TOTAL	S LINEC	DETAILS			
Production Settings			Scheduling	Details				
Warehouse *	WHOLESALE - Wholesale Warehouse	٩.	Schedule Sta	tus.	Unscheduled			
Location *	R1S1 - Row 1 Shall 1	9	Scheduling 5	lettod	Finish On			
Product Workgroup		9.	Constraint*		11/24/2024	3)		
Product Manager		٩	Start Date		11/21/2024			
Costing Method	Actual		End Date		11/22/2024			
	Allow Preassigning Lot Serial Number	6	Due Date		11/30/2024			
Require Parent Lot/Seri	Never		-		Cilling Elund Mile	Land Times for Order Dates		
					Citize Order Sta	T Date for MEP		
Scrap					C Evelute ton A	and the second		
	Scrap Override				D & manufa Davi	Second Records		
Sorap Warehouse	RETAIL - Retail Warehouse		annesine.		Automatic Backward Reporting			
Sorap Location	RETURNS - Returns area		Capaciti Pr	and a		4		

Figure: The new Due Date box

The **Due Date** box is editable, except for the following cases:

• A linked sales order line is specified in the **SO References** section on the **References** tab of the *Production Order Maintenance* form.

In this case, the **Ship On** date of the linked sales order line is automatically specified as the due date of the production order. If a user modifies the ship-on date of the linked sales order line, the due date will be updated accordingly. If a user unlinks the sales order, the system will preserve the specified due date, but the **Due Date** box will become editable.

• A linked production order with the *Parent* relationship type is specified on the **Related Production** tab of the *Production Order Maintenance* form.

In this case, the inventory item's allocation date is used as the due date of the production order if this inventory item is used as a material in an operation in the related production order. If the inventory item is allocated for multiple operations or multiple material lines in the related production order, the system will

use the earliest allocation date. If a user modifies the ship-on date of the linked sales order line, The due date will be updated accordingly upon any change of the allocation date of the material used in the related production order. If a user deletes the related production order, the system will preserve the specified due date, but the **Due Date** box will become editable.

• The production order is not linked to a sales order line or a parent production order, and its status is not *On Hold*.

If the production order has no linked demand, the system sets its due date to the date specified in the **Promise Date** column on the *Inventory Planning Display* (AM400000) form when the production order is created through that form.

The system will log an event on the **Events** tab of the *Production Order Maintenance* form when the production order's due date has been assigned or updated. This allows users to track who and when assigned or modified the due date, providing information for investigating changes that led to delayed or expedited production orders.

To improve visibility of the required supply dates for planning, scheduling, and tracking, the system also displays the due dates on the following forms:

- Production Schedule Board (AM215555)
- Production Summary (AM000006)
- Release Production Orders (AM500000)
- Rough Cut Planning (AM501000)
- Work Center Schedule (AM000001)

# Manufacturing: Enhanced Material Availability and Production Readiness Tracking

In Acumatica ERP 2025 R1, a new inquiry form, *Production Orders by Build Capability (AM409000)*, has been introduced. This inquiry form (shown in the following screenshot) provides advanced tools for improving production planning efficiency by providing real-time insights into material availability. This enhancement supports production managers and planners in making more informed decisions and streamlining their workflows.

Produc	tion Orders b	y Build Capability							costoworno	• 100L8 •
0 1	H S									
0.00	ini i	RÓ - Rejular Colera	A 100	enne -	WHOLESALE -	Wholesale W /D				
Dring risks	er falsde treg to a	colper No					9			p
Dynar Type	Renduction Kite	invertery U	Restricts	anne.	State (June	End State	Uty 30 Produint	Grp. Rendy in Predicts	Readings to Product	Name of Street
80	AMERICE 1.10	MODALE.	WHELESALE	Pansot	1142024	1140008	1.00	1.00	Heaty	1.00
80	AMEDODOLD -	MINELURGIS	WHICKEISALE	Panted	\$42034	842034	10.06	90.00	Bandy	95.05
90	AMI000036	MOWEDGET	3JA63JOHW	Planed	85/2024	11,28/2025	900.00	50.00	Partially Re.	508-00
80	AM6000032	AMMERICAS	WHOLESALE	Parcet	6492034	10/30/2024	1,000.00	0.00	Not Resulty	1,000.00
90	AM1000031	MOZURICA	WHOLESALE	Planed	829/2024	942024	100.00	9.00	Ret Finally	108.00
90	AM000029	AMAGELIRIGHS	WHOLEBALE	Planet	816/2024	9100004	3.00	3.08	Heady .	3.00

#### Figure: The new inquiry form

Each production order displayed on this form is assigned a readiness status, enabling users to quickly assess whether orders can be initiated based on material availability. Color coding is applied to highlight the readiness of production orders, particularly those with insufficient materials for production. The following readiness statuses are available:

- Ready to Produce (dark green): All materials are available to produce the remaining quantity.
- *Partially Ready to Produce* (light green): Materials are sufficient to produce a portion of the remaining quantity.
- Ready to Start (yellow): Materials are available to complete the first operation.
- Not Ready (red): Materials are insufficient to complete the first operation.

Calculations are based on the **Qty. Hard Available** for all materials.

The inquiry form has a side panel with the following tabs for streamlined planning:

- **Production Order Maintenance**: Provides quick access to additional production information for detailed review.
- Critical Materials: Enables planners to create supply records for addressing material shortages.
- **Production Tickets**: Allows production managers to print necessary documents for production orders being released into production.

In the out-of-the-box system, a user can find the link to this inquiry form in the **Production Orders** workspace under the **Inquiries** category.

These changes simplify the process of evaluating material readiness, improve transparency in production planning, and enhance the ability to address material shortages proactively. Production managers and planners can now rely on more precise insights and efficient tools to ensure production schedules are met and supply chain disruptions are minimized.

# **Manufacturing: Enhanced Production Scheduling Views**

In Acumatica ERP 2025 R1, production scheduling views have been significantly enhanced. The improvements address the diverse needs of different manufacturing environments, providing manufacturing schedulers and planners with advanced tools to visualize and manage production schedules more effectively.

## Work Center Planned Utilization Dashboard

A new dashboard, *Work Center Planned Utilization (AM0044DB)*, has been introduced. This dashboard offers a graphical view of the planned load for a work center, displayed as a bar graph representing utilization over time. Users can select specific work centers to analyze and define time ranges for the data displayed on the graph. The planned load is shown as a percentage of capacity. The graph uses the following color coding to represent planned load:

- *Green*: Planned load is between 0% and 100%.
- *Yellow*: Planned load is greater than or equal to 100% and less than 101%.
- Orange: Planned load is greater than or equal to 101% and less than 120%.
- *Red*: Planned load is greater than or equal to 120%.

The **Work Center Schedule** table below the graph displays information about the production schedule and load details for the date selected in the **Schedule Date** box.

The dashboard is shown in the following screenshot.



#### Figure: Work Center Planned Utilization dashboard

In the out-of-the-box system, a user can find the link to this dashboard in the **Dashboards** workspace under the **Dashboard: Manufacturing** category.

The dashboard is available only if the *Advanced Planning and Scheduling* feature is enabled on the *Enable/Disable Features* (CS100000) form.

## **Changes to the Production Schedule Board Form**

The Production Schedule Board (AM215555) form has been enhanced as follows:

- A consolidated graphical bar now represents the duration of top-level production orders and their dependent subassemblies.
- Scheduling exceptions and dependencies are displayed on a single screen, with visual indicators for late, early, and on-time production orders. Relationships between dependencies and successors are represented by arrows.

- Gantt chart bars include visual icons indicating whether production orders are early or late based on the due dates of their linked demands.
- Enhanced filtering capabilities enable users to quickly filter production orders by criteria, such as active, inactive, late, and customer-specific orders.
- •
- A secondary sort option organizes production orders by descending completion dates.
- Infinitely scheduled production orders are now visible on the form, accommodating manufacturers that do not use finite scheduling.

# Manufacturing: Enhancements in Finite Production Scheduling

The changes described below are applicable to companies that have enabled the *Advanced Planning and Scheduling* feature on the *Enable/Disable Features* (CS100000) form and are using this functionality.

In Acumatica ERP Manufacturing Edition, the constraint date acts as a limiting factor in planning, influencing when production activities should start or finish. The production scheduling algorithm attempts to schedule a production order as close to its constraint date as possible, factoring in available capacity and material availability (if it is configured).

When a production order cannot be scheduled to meet the constraint date, a production planning manager reviews the scheduling outcomes to determine which production orders can be rescheduled, which orders can be delayed, and when overtime is required to increase capacity.

In previous versions of Acumatica ERP, users could encounter unexpected results when the system could not backward-schedule a production order based on its constraint date (that is, when the *Finish On* scheduling method was used and the start date calculated based on the constraint date was in the past). In this case, the system switched from backward scheduling to forward scheduling (that is, the scheduling method was changed to *Start On*) and changed the constraint date to the current date (or to a future date, if other production orders were competing for the same work center resources). The information about the original constraint date and scheduling direction was lost, which made it challenging for the production planning manager to compare the calculated production start and end dates with the desired constraint date.

In Acumatica ERP 2025 R1, if a user is attempting to schedule a production order on the *Rough Cut Planning* (AM501000), *Production Order Maintenance* (AM201500), or *Production Schedule Board* (AM215555) form and the production order cannot be scheduled backward to meet the constraint date, the system does the following:

- Attempts to schedule the production order forward by assigning the start date to the current date or a future date based on the load of the work centers involved. The constraint date and the *Finish On* scheduling method are preserved, which helps the production planning manager to compare the calculated earliest end date with the original constraint date.
- Displays a message indicating that the production order has been scheduled forward instead of backward. A similar message is also displayed on the **Events** tab of the *Production Order Maintenance* form.

Additionally, the system now displays a warning message if a production order cannot be scheduled because its constraint date is outside the scheduling window of 120 days. Previously, the scheduling algorithm ignored such production orders, but no notification was shown to the user.
# Manufacturing: Other Improvements

## Improvements to the Processing of Inventory Transactions

Starting in Acumatica ERP 2025 R1, all manufacturing journal transactions, which were previously recorded in the general ledger, will now be handled within the Inventory functional area. This change simplifies the manufacturing transaction release process and reduces the likelihood of data issues.

Inventory transactions generated in manufacturing will now respect the state of the **Update GL** check box on the *Inventory Preferences* (IN101000) form. If the check box is selected, the transactions are posted to the general ledger. If the check box is cleared, the general ledger is not updated by these transactions.

# Payroll: Accruing Time Off by Earning Type for PTO Banks

In Acumatica ERP 2024 R2 and previous versions, users could define a particular earning type to accrue time off for paid time off (PTO) banks. If a PTO bank had the *Percentage* or *Front-Loading and Percentage* accrual method, it accrued time off based on all the earning types that had the **Accrue Time Off** check box selected in the Summary area of the *Earning Type Codes* (PR102000) form.

Starting in Acumatica ERP 2025 R1, the applicable earning types for accruing time off are defined on the PTO bank level instead of earning type level so that users can more flexibly configure PTO banks.

## Configuration of the Applicable Earning Types for PTO Banks

To define the earning types to be used for accruing time off for a PTO bank, a payroll administrative user should perform the following steps on the *PTO Banks* (PR204000) form:

1. Selecting the *Percentage* or *Front-Loading and Percentage* accrual method in the **Accrual Method** box on the **General** tab.

The **Applicable Earning Types** tab appears on the form. In the **Accrue Time Off Based On** box in the upper area of this tab, the *Selected Earning Types* option is selected by default.

- 2. Specifying the earning types to accrue time off on the **Applicable Earning Types** tab in one of the following ways:
  - Leaving *Selected Earning Types* selected in the **Accrue Time Off Based On** box in the upper area of the tab, and adding to the table the earning types to accrue time off, as the screenshot below shows. The system will use only the earning types added to the table to accrue time off for the PTO bank.
  - Selecting *All Earning Types Except Selected* in the **Accrue Time Off Based On** box, and adding to the table the earning types that will not accrue time off. The system will use all the earning types configured in the system except the ones listed in the table to accrue time off for the PTO bank.

SKD - Sick Days			CUSTOMIZATION TOOLS -
5 □ 0 +	8 0 ° к	< > >I	
• Bank ID. SKD	- Sick Days	Q	Active
Description Sick	Days		Apply Banding Rules
Disbursing Earning Type: SK -	Sick Day	Q.	Accrue Only on Certified Job
GENERAL EMPLOYEE CL/	Selected Earning Types	ARNING TYPES	
O + X H M			
B *Earning Type Descripti	on	Earning Type Category	Sec
> DT Double	lime	Overtime	
RG Regular	Hours	Wage	

Figure: Earning types that accrue time off for a PTO bank

## **Upgrade Process**

During the upgrade of Acumatica ERP to 2025 R1, the system updates the PTO banks that have the *Percentage* or *Front-Loading and Percentage* accrual method specified in the **Accrual Method** box on the **General** tab of the *PTO Banks* (PR204000) form. The system does the following for these PTO banks on the **Applicable Earning Types** tab:

- Inserts the Selected Earning Types option in the Accrue Time Off Based On box in the upper area of the tab.
- Adds to the table all the earning types with the **Accrue Time Off** check box selected in the Summary area of the *Earning Type Codes* (PR102000) form.

# **Other Changes**

In the Summary area of the *Earning Type Codes* (PR102000) form, the **Accrue Time Off** check box has been removed.

# **Payroll: Detailed Pay Stub Reports**

The following reports, which can be used for printing pay stubs, have been added to the system:

- Detailed Pay Stub (PR642010)
- Detailed Pay Stubs (PR642015)

The usage of these reports is configured at the payment method level.

## **Configuration of Payment Methods**

The configuration of the payroll functionality for the *Cash/Check* and *Direct Deposit* payment methods has been improved. An administrative user can now specify whether users can print payroll documents by using simplified or detailed paycheck and pay stub reports.

On the **Settings for Use in PR** tab of the *Payment Methods* (CA204000) form, while configuring a *Cash/Check* payment method with the **Print Checks** option button selected in the **Processing** section, the administrative user can select the **Use Detailed Pay Stub Report** check box. This makes the system use the detailed pay stub reports for printing payroll documents processed with that payment method. Also, if the check box is selected, the system automatically selects the *Detailed Paychecks (PR642000)* report in the **Report** box, as the screenshot below shows.

If any other report except *Detailed Paychecks* is selected in the **Report** box, the system clears the **Use Detailed Pay Stub Report** check box. When the user clears the **Use Detailed Pay Stub Report** check box, the system automatically selects the simplified *Paychecks (PR641010)* report in the **Report** box. Thus, the detailed pay stub report is always used along with the detailed paycheck report for a *Cash/Check* payment method.

CHECK - Check Pa	yment		D NOTES	ACTIVITIES FILES CUSTOMIZATION TOOLS -
• ¤ ¤ •	+ 8 0 ~ 1	< <	> >	
Payment Method ID	CHECK	p	🛃 Use in AP	Set Payment Date to Bank Transaction Date
Means of Payment:	Cash/Check		🛃 Use in PR	
Description     ALLOWED CASH ACCO	Check Payment	SE IN AR	SETTINGS FOR U	SE IN AP SETTINGS FOR USE IN PR
PROCESSING		- 1	PRINT SETTINGS	PD 64 25 05 Datalled Datab
O Create Batch Paym	ints.		REPORT SETTINGS	Processory - Declared Payon 24
105			Use Detailed Pay S	Stub Report

### Figure: Payroll settings for a Cash/Check payment method

On the same tab, while configuring a *Direct Deposit* payment method with the **Create Batch Payments** option button selected in the **Processing** section, the administrative user can select the **Use Detailed Pay Stub Report** check box, as the screenshot below shows. This makes the system use the detailed pay stub reports for printing payroll documents processed with this payment method.

DIRDEPOSIT - Dire	ct dep	osits					NOTES	ACTIVITIES	FILES	CUSTOMIZATION	TOOLS -		
€ □ □ ∩	+	1	0 -	ĸ	<	>	×						
Payment Method ID	Payment Method ID DIRDEPOSIT ,0					00	e in AP	Set Payment Date to Bank Transaction Date					
Active Means of Payment Direct Deposit							e in AR	🛃 Require Ra	mittance in	formation for Cash A	trucco		
Means of Payment: Direct Deposit				]	🛃 Ut	e in PR							
Description     Direct deposits													
ALLOWED CASH ACCO	UNTS	SETT	INGS FOR	USEIN	PR	REN	ITTANCE SE	TTINGS					
PROCESSING						EXPORT	SETTINGS .	8					
O Print Checks	O Print Checks					· Export	Scenario	Export PR Payment to ACH P					
Create Batch Payments					Skip Payments with Zero Amour				Zero Amounts				
19	1002.0					REPORT	SETTINGS .	10.000	×				
						Use	Detailed Pay	Stub Report					

Figure: Payroll settings for a Direct Deposit payment method

### **Printing of Payroll Documents**

On the *Paychecks and Adjustments* (PR302000) form, when a user clicks **Print Pay Stub** on the More menu, the system opens one of the following:

- The *Detailed Pay Stub (PR642010)* report (see the following screenshot) if the **Use Detailed Pay Stub Report** check box is selected for the payment method of the document
- The simplified Pay Stub (PR641000) report if the Use Detailed Pay Stub Report check box is cleared

Ċ	🕮 🌆 🗟 🖌 🗲 🗲 😸 PRINT SEND EX	PORT • Type year query hire	Fin
PAID IN THE NAME OF	SWEETLIFE READ OFFICE AND WHOLESALE CENTER		
TO THE	49 Main Du, Flushing, New York, NY 11347. Tel: +1 917 341 8776	Check Date: 1/13/2005	
UNDER OF	TERFY REISSTEIN	\$ *****850.76	D-5
	Derry Reinstein 152 E Joch St Dew York, UY 10016		

### Figure: The Detailed Pay Stub report

Similarly, on the *Payment Batches* (PR305000) form, when a user clicks **Display Pay Stubs** on the More menu, the system opens one of the following:

- The *Detailed Pay Stubs (PR642015)* report if the **Use Detailed Pay Stub Report** check box is selected for the payment method of the document
- The simplified Pay Stubs (PR641015) report if the Use Detailed Pay Stub Report check box is cleared

On the *My Payroll Documents* (PR405000) form, when a user clicks a link in the **Reference Nbr.** column (see the following screenshot), the system opens one of the following:

- The *Detailed Pay Stub* report if the **Use Detailed Pay Stub Report** check box is selected for the payment method of the document
- The simplified Pay Stub report if the Use Detailed Pay Stub Report check box is cleared

1	Ny Payrol Pay stues	II Docume	ents								TOOLS .
	0 н	8									
-	* Transactio Date	Туре	Reference Nbc	*Pay Group	Pay Pariod	Net Pay	Gross Pay	* Period Start	*Period End	Total Hours	Avecage Rate
>	1/13/2025	Regular	000003	WEEKLY	02-2025	1,312.72	2,100.00	1/1/2025	1/7/2025	40.00	52.50
	1/6/2025	Regular	000010	WEEKLY	01-2025	780.44	1,200.00	12/25/2024	12/31/2024	40.00	30.00

### Figure: Link to open the pay stub reports from the My Payroll Documents form

The same reports are also available on the *Pay Stubs* screen in the Acumatica mobile app.

### **Other Enhancements**

The *Detailed Pay Stubs (PR642000)* report that already existed in Acumatica ERP 2024 R2 and previous versions has been renamed to *Detailed Paychecks*.

# **Payroll: Summary Report**

The *Payroll Summary (PR641012)* report has been added to the **Reports** category of the **Payroll** workspace. The report provides an easy way to review the results of one or multiple pay runs before or after release. The results include payroll funding, check counts, advice counts, wages, employer taxes, employee taxes, hours, earnings, deductions, and benefits. The following screenshot shows the first three pages of this report.

Payroll	Summary	Select By:	By Transaction De	ite Payment Method	*	
		Date From:	1/4/2024	Cash Account:		
Comman Branch	0000	Date To:	4/5/2024	Pay Group:		
her.	Joseph Bacher	Include Data from Unreleased Paysthecks	Yes	Employee:		
Date	1/23/2025 1:05 PM	and and a speakers.				
Larnings						
Earnings Category	Earning Type	Regular	Hours Overtin	ne Hours	Amount	Certified Job
Wage						
	RG - Regular Hours		695.00		75,580.00	
Overtime						
12020202	DT - Deuble Time			2.00	140.00	
Amount Rase	d			0.000	1.000	
ranoun ocoo	lithi - Boourt				120.00	
Time-Off	and a provide				141/00	
11110-011	HL - Public Holdaya		8.00		280.00	
Teret			700.00	2.00	70. 130.00	
Servefits		11111111	1000			
tenelits Conflution De louite	duction			nount	Payable Amount - Tr	No GL
tenetita Confluction De Iource De	duction the second seco		An	nount	Payable Amount Tr	No GL.
enellis corrèction De lource Employee Set 40	duction tlings IK - 4015k) retirement plan		A. 15	70471 00.00	Payable Amount Tr	No GL
Employee Set	Eduction f trings IK - 4015k) retirement plan R - Car Altowance		J.5	10000 D0	Payable Amount Tr	No GL unsactions
Employee Set	Eduction t trings IK - 401(k) retirement plan R - Car Altywance LLPHONE - Cell Phone		An 15	10000 D	Payable Amount T	No GL ansactions
Employee Set	Edución I ttings IK - 4016k) retirement plan R - Car Altovance LLPHONE - Cell Phone ILDCARE - Childcore Benefits		An 15	00000 00.00 50.00	Payable Amount Tr 500.00 50.00	No GL ansactions
Employee Set	Cursion ( Itings IK - 401(k) retirement plan R - Car Allowance LLPHONE - Cell Phone ILDCARE - Childcare Benefits ALTHINS - Health Insurance		An 15	50.00 50.00 37.20	Payable Amount Tr 500.00 50.00	No GL ansactions
Employee Set	Closen ( trings IK - 401(k) retirement plan R - Car Allowance LLPHONE - Cell Phone ILDCARE - Chitcare Benefits ALTHINS - Health Insurance A - Health Saving Account		40 15 1,1 1	50.00 50.00 37.30 00.00	Payable Amount Tr 500.00 50.00	No GL tansactions
Senetits Corribution De Iource Employee Set 40 CA CE CH HE HS Union HE	CVCSONY tings IK - 401(s) relimment plan R - Car Allowance LLPHONE - Cell Phone RLDCARE - ChitScave Benefits ALTHINS - Health Insurance A - Health Saving Account ALTHINSURION - Health Insurance		15 1,1 1,1	50.00 50.00 37.30 00.00	Payable Amount Tr 500.00 50.00	No GL ansactiona
Benefits Confloate Employee Set 40 CA CE CH HE HS Union HE Tosat	Cusson tings IK - 411(k) retirement plan R - Car Alowance LLPHONE - Cell Phone ILDCARE - Childcore Benefits ALTHINS - Health Insurance A - Health Saving Account ALTHINSUNION - Health Insurance		15 1,3 1,3 2,0	50.00 50.00 37.30 00.00 16.40	Payable Amount Tr 500.00 50.00	No GL ansactiona
Benefits Corribution De Iource Employee Set 40 CA CE CH HE HS Union HE Tosat	Curson V tings IK - 401(k) retirement plan R - Car Allowance LLPHONE - Cell Phone ILDCARE - ChitScave Benefits ALTHINS - Health Insurance A - Health Saving Account ALTHINSUNICH - Health Insurance		15 15 13 20	50.00 50.00 57.30 00.00 16.40 16.40	Payable Annount Th 500.00 50.00 550.00	
Sensellis Configueion De Employee Set 40 CA CA CA CA CA CA CA CA CA CA CA CA CA	Custon tings IK - 401(k) retirement plan R - Car Allowance ILDPONE - Cell Phone ILDCARE - Childcare Benefits ALTHENS - Health Insurance A - Health Saving Account ALTHENSUNION - Health Insurance		40 15 13 13 13 13 13 13 13 13 13 13 13 13 13	00.00 50.00 37.30 00.00 16.40 <b>05.76</b>	Payable Amount Tr 500.00 50.00 50.00	
Securities Conflocation De Iouitie Employees Set 40 CA CA CA CA CA CA CA CA CA CA CA CA CA	Custon tings IK - 40150; retirement plan R - Car Alowance LLPHONE - Celebone Broatts ALTHINS - Health Insurance A - Health Saving Account ALTHINSUNICH - Health Insurance		15 13 13 20	00.00 50.00 37.30 00.00 16.42 16.42	Payable Amount Tr 500.00 50.00 550.00	No GL ansactions
Senetits Conflocation Employee Set 40 CA CA CA CA CA CA CA CA CA CA CA CA CA	Cusson tings IK - 405k) retirement plan R - Car Abywance LLPHONE - Celebone BCCARE - Childcare Benefits ALTHENS - Health Insurance A - Health Saving Account ALTHENSUNCN - Health Insurance Deduction tings		15 15 13 20	00.00 50.00 37.30 00.00 16.42 15.75	Payable Amount Tr 500.00 50.00 S50.00 Amount G	No GL ansactiona IX
Senetits Conflocted Employee Set 40 CA CA CA CA CA CA CA CA CA CA CA CA CA	Custon tings IK - 40150; retirement plan R - Car Adowance LLPHONE - Celebone BLCPARE - Childoare Benefits ALTHENS - Health Insurance A - Health Saving Account ALTHENSUNICH - Health Insurance Deduction Engs 4016 - 401(b) retirement plan		15 13 13 20 20	00.00 50.00 37.30 00.00 16.42 16.42	Payable Amount Tr 500.00 50.00 550.00 Amount Ga 3,000.00	No GL ansactiona
Secretiss Correction De Iouite Employee Set 40 CA CR CR CR HE HS Union HE Tossit	Custom tings IK - 40150; retirement plan R - Car Alowance LLPHONE - Celebone Brooke - Chickowe Benefits ALTHINS - Health Insurance A - Health Saving Account ALTHINSUNICH - Health Insurance Decodors Custom		20 20	00.00 50.00 37.30 00.00 16.40 19.70	Payable Amount Tr 500.00 50.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00	No GL ansactione
Securities Conflocation Employees Set 40 CA CA CA CA CA CA CA CA CA CA CA CA CA	Custom tings IK - 40150; retirement plan R - Car Alowance LLPHONE - Cell Phone ILDPARE - Childowie Berufits ALTHINS - Health Insurance A - Health Saving Account ALTHINSUNION - Health Insurance Custom Discussion Engs 401K - 4010) retrement plan HEALTHINS - Health Insurance LIFEINS - Life Insurance		20 20	00.00 50.00 37.30 00.00 16.40 16.40	Payable Amount Tr 500.00 50.00 50.00 558.00 Amount G 3.000.00 1.895.50 85.42	No GL ansactione
Senetits Correction De loutee Employee Set 40 CA CE CH HE HS Union HE Tosat Veductions Coductions Coductions Employee Set Union	Cutton tings IK - 401(k) reference plan R - Car Advance LLPHONE - Cell Phone ILDCARE - Chitcare Benefits ALTHINS - Health Insurance ALTHINS - Health Insurance Deduction Engs 401K - 401(k) reference plan HEALTHINS - Health Insurance LIFEINS - Life Insurance		20 20	50.00 50.00 57.30 00.00 16.40	Payable Annount Th 500.00 50.00 50.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00 550.00	No GL ansactione
Senetits Corrections Employee Set 40 CA CE CH HE HS Union HE Tosat Neductions Coductions Employee Set Union	Cutoon tings IK - 401(k) reference plan R - Car Advance LLPRONE - Cell Phone RLDCARE - Chitcare Benefits ALTHINS - Health Insurance ALTHINS - Health Insurance ALTHINSUNICH - Health Insurance Deduction Tings 401K - 401(h) referenced plan HEALTHINS - Health Insurance LIFEINS - Life Insurance DUES - Union Dues		20 20	50.00 50.00 50.00 10.40 16.40	Payable Annount Tr 500.00 50.0	No GL ansactione
Benefits CostBuction Employee Set 40 CA CE CH 40 CA	CUSION tings IK - 401(k) refirement plan R - Car Advance LLPRONE - Cell Phone RLDCARE - Chitcare Benefits ALTHENS - Health Insurance ALTHENSUNION - Health Insurance Concession Concesion Concession Concession Co		15 13 13	50.00 50.00 50.00 10.40 16.40	Payable Annount T 500.00 50.00	No GL ansactione

### Figure: Pages 1, 2, and 3 of the Payroll Summary report

The last section of the report, **Grand Total**, provides the following summary information on the remaining pages of the report, as the screenshot below shows:

- Total gross payroll
- Total earnings

- Total payable benefits
- Total employer tax
- Total deductions
- Total employee withholding
- Total net pay
- Total cost of payroll

				_			
as Jurisdiction	Tax .		kate Taxable Hours1	Taxable Wages	Tasable Gross Employe	e's Withholding Amount	Employe Tax Amo
ederal			1. The R 10. Co.		a standard and a standard and	14.7.7.95	
	FICA-FICA		690.00	75.870.00	75.870.00	4,703.94	
	FIT - Federal Income Tax		600.00	72,870.00	72,870.00	15,133.59	
	MEDI - Medicare		690.00	75,870.00	75,870.00	1,100.11	
	ER FICA - Employer FICA Tax		690.00	75,870.00	75,870.00		4,703.0
	ER FUTA - Federal Unemployment Tax		354.00	14,820.00	38,345.00		331.3
	ER MEDI - Employer Medicare Tax		690.00	75,870.00	75.870.00		1,100.1
tate							
	WA FLI - Washington Paid Family & Medical Leave	W	A 690.00	75.870.00	75,870.00	401.03	
	WA ER SDI - Washington Industrial Insurance - Employer	W	A 0.00	0.00	0.00		8.7
	WA ER SUTA - Washington State Unemployment Tax	W	A 690.00	75.870.00	75.870.00		1,661.3
	WA ER SUTA SC - Washington Rate Class 1	W	A 690.00	75,870.00	75,870.00		451.8
	Thru 40 Employment Admin Fund						
otat AAAAA	Thru 40 Employment Admin Fund	~	~~~~	~~~	~~~~	73.338.65	8,397/ ///////////////////////////////////
otal: Aymenta	Thru 40 Employment Admin Fund	Cal	h Account	~~~		21.338.47	A.257.4
otal: Annotal symenta	Thru 40 Employment Admin Fund	<ul> <li>Cal</li> </ul>	h Account	~~~		21.338.47 Number of Payments	8,257.4 Amount of Payme
etal:	Thru 40 Employment Admin Fund	Cal 102	Account 00 - Company Checking	Account		21,338.47 Number of Payments 3	Associate of Payme
etat:	Thru 40 Employment Admin Fund Payment Method CHECK - Dheck ACH - ACH	Call 102 102	Account 00 - Company Checking 00 - Company Checking	Account Account		21,338.47 Number of Payments 3 4	8,257/ Amount of Payme 69,423
otat: Aymenta ash/Check inect Deposit GRAND TOT	Thru 40 Employment Admin Fund Poyment Method CHECK - Dheck ACH - ACH	C-0 102 102	A Account 00 - Company Checking 00 - Company Checking	Account a Account		21,338.47 Number of Payments 3 4	Amount of Payme 49,423
etat: aymenta esh/Check rect Deposit GRAND TOT Gross Pay:	Thru 40 Employment Admin Fund ent Payment Method CHECK - Check ACH - ACH TAL 75,91	Car 102 102	Account 00 - Company Checking 00 - Company Checking Deductions:	Account Account	4,935.0	21,338.67 Number of Payments 3 4	8,257.4 Amount of Paymen 899 49,422
otal: Aymenta astricheck secribiposit GRAND TOT Gross Pay: Earnings:	Thru 40 Employment Admin Fund Pagment Method OHECK - Dheck ACH - ACH AL 75,9 75,9	Can 102 102	A Account 00 - Company Checking 00 - Company Checking Deductions: Employee Taxes:	Account Account	4,935.0	21,338.67 Number of Payments 3 4	Amount of Payme 49,423
otal: aymenta ashiCheck rect Deposit GRAND TOT Gross Pay: Earninga: Payable Ben	Thru 40 Employment Admin Fund	Can 102 102	Account 07 - Company Checking 00 - Company Checking Deductions: Employee Taxes: Net Pay:	Account a Account	4,335.0 21,191.5 49,423.4	21,338.67 Number of Payments 3 4	Amount of Payme 49,423
otal: ayments asth Check lect Deposit GRAND TOT Gross Pay: Earnings: Payable Ban Other Benefi	Thru 40 Employment Admin Fund	Can 102 102 102	Account 00 - Company Checking 00 - Company Checking Deductions: Employee Taxes: Net Pay:	Account Account	4,935.0 21,191.5 49,423.4	21,338.47 Rumber of Payments 3 4 0 2 8	8.257.4 Amount of Payme 49,423

Figure: Pages 4 and 5 of the Payroll Summary report

# Payroll: Taxes by Code Report

The *Taxes by Code (PR641068)* report has been added to the **Annual Reports** category of the **Payroll** workspace. The report shows annual statistics of paid taxes grouped by tax codes (see the following screenshot), if the report is generated with the default *Tax Code* option selected as the **Level of Detail** report parameter.

Annual	Taxes													Trap: Respire Sociale	Dana Youn					
Congoing Blanch Liter Date	PROD Assept Decher VEX/DEX.1017													The Col The Col Jonato These		3	į.			
fae time	1000	1	-	-	freeman.	1000	Tunation Without	-	Texator.	Taxate Direct	1andian Magan	- 100	-	100	1222		-	-	1 and and a	- 14
ER FIELA	812.00	11,000,00	15.0% de	4,850.10	5.00	1.00	2.00	1.04	. 10	1.05	1.0	1.00	1.00	440		- 846	47310	15,495.00	15,000.00	440110
an ingris	675.00	11,000.000	14,000,000	100.00	- 48	5.00	1.00		1.44	4.66	1.00	0.00	5.00	4.00	4.00	104	412.00	PLOSE AV	14,00.00	100.00
an water	873.00	10,000,000	14,049,000	1.006.02	1.00	1.000		1.00	1.00		1.00	- 0.00	140	8.60	1.00	6.00	100	79,491.00	10,000.00	1.000.00
PICA .	415.00	75,056.04	15,280,00	446275	110	0.0486	0.00	1.00	0.00	1.00	110		4.84	100		10.00	41110	15,000.08	10.001	4,800.10
10	473.00	10,000,000	11,745.06	16,013.07	1.00		10.00	1.00	110	1.00	4.06		1.00	1.00	5.00.	1.10	112.00	70,001.00	10.044.00	10,003.00
HEDK.	815.00	15,000.00	1.00		- 640	6.00	1.000	4.00	5.46	6.00	1.00	1.00		4.00	5.00	0.00	875.00	15.00.00	6.00	1.00
with .	415.04	75,000.00	15,054,01	1,04,27	500	- 100	. 646	8.05	1.40	1.00	100	6.00		1.00		244	#15.00	75,550.08	15.00.00	1,06.27
HALER PLI	672.00	11.000.00	75.055.04	1.00	0.00	1.00	1.00		4.86			+40	1.00	2.00	1.00		473.06	10,000.00	70.000	
this did take	0.00		1.00	8.40	1.00	1.44	1.00	1.00	1.46	4.00	1.00	1.00	1.94	140	1.44	1.00	1.40	1.05		4.40
one are surfailed	473.00	11,001.08	Ph. 200 Aut	405.08				440	1.44	1.00			4.60	446	4.86		40.0	14,061.00	10.041-00	400.08
IN DRAWN	477-00	71,049,02	11(10)(4)	1,881,148	100	0.00	1.00	1.40	1.00	1.06	+	0.00	.4.0	1.00	1.00	4.04	411.00	16.000.00	N.M.W.	140.10
and PLA	412.00	11,000.00	11,245.46	38.70	4.00	1.00	1.00	1.00	1.00	1.00		1.04	4.00	1.00		4.48	-01140	18,000.00	764004	346.70
84.00	14	1.00	1.00	1.00	5.49		5.00	0.00		100	1.00		1.00	141	548	1.00		1.00	+#	1.4
Tout				PL 245.45												4.00				30,000.03

Figure: The Taxes by Code report with the tax code level of detail

The report additionally shows employee breakdowns for each tax code if it is generated with the *Employee* option selected as the **Level of Detail** report parameter. If a user clicks an employee name in the report (see the following screenshot), the system opens the *Taxes by Employee* (PR641067) report for that employee.

Annual Is Ter Lee	Taxes														na Inna Tran Inna Tran Inna Tran Inna Long					
Tax Example		-	Tanata Magar	-	-	fander Groot	1 and 10 Mager		-	Taxaba Drive	1 martine Minipate	-	Tanger Martin	Taxanta Second	Transfer Bright		Taxante Marca	Taxate Original	1	-
CREAK	1.150			100		12.2			1000	1000		-	110				9 0 A 1			1.1
Manual Baker	100.00	20,000.04	10.001.04	1.165.76	- 10	5.00				100	1.0			4.00		100	38.0	31,000.04	10.001.04	21946.76
Motori Andrews	100.00	41.000.00	+1.000.000	2100.04	9.05		1.98		0.00	+	- 64	1.00	1.996	1996	1.00	5.00	08-10	*1.040.00	41,900.08	1.565.34
Butman	473.00	15,098.00	15,095.00	4403.10					1.00		0.00				8.48	8.00	+12.00	11.000.00	15,010,00	4,852,10
Mariant Baller	-	-	-	-		-									-			10,0024	1,000.00	
Michael Andrews	100.00	*1,000,000	1.000188	141.00	1.00	1.00				+		-	0.00	104	6.00	1.00	10.0	41396.00	1000-06	101.00
S.irest	475.00	75,000.00	14,000,000	100.04	1.01					4.00	0.00	0.00		4.00	1.00		170.00	75,050,08	14,000.00	101.00
are leaded																				
Maxwell Baller	10.00	DOM:N	10,061.04	-	1.0	1.00	1.000	1.00	1.44	1.00	1.00		1.000	848	1.07	100	20.00	10.002.00	10.00114	444.00
Metasi Indras	106.40	11,000.00	1.000.00	80414	1.00	6.00			1.0	1.00	100			.4.00			10.0	*	11,000.000	80.00
Parry I	415.00	19,000,00	15,653,01	1.000.00	1.00	1.00			1.00				8.00	1.00			112.00	15,899-08	75,000,00	1,008.00
rica																				
Mini and Spins	140.00	10.003.04	10,003.34	1,000 (10)	1.00	1.0	0.00	1.144	1.00	1.00	4.40	+ 100	1.00	1.00	1.00	1.00	100.00	10.001.04	30.003.04	1,04.16
Molasi Indress	104.04	47,008.08	41,000,000	1,00.14	1.00	640		- 446	1.00	1.00	1.00		+	++	1.00	1.40	100.00	41,000.00	41,969,000	0.565.34
Bange .	atami	15.000.00	11.010.00	4403.00	3.00	8.00	8.00		1.00	0.00	1.00	5.00	-		-	8.00	171.00	15,000.00	75,005.00	*.852.14
eet.																				
Morwell Super-	100.00	10,000,00	12.00.00	1,201-00	1.0	1.00	1.040	1.00	1.00	+-	3.00		1,946	10	1.0	100	16.0	\$1,000,000	by deal on	A DEAL
Michael Andrews	101.00	****	4.000.00	\$19.16	100	10	1.00	1.00		0.00	3.40		. 6.6	1.00	100	1.00	28.00	*1.00.00	10,000.00	8,797.08
C Acur	natica								Centrum	2										Page 143

Figure: The Taxes by Code report with the employee level of detail

# Platform: Improvements to the XML Import and Export Functionality

Acumatica ERP 2025 R1 introduces the improved import of records by using the XML import and export functionality.

# **Changes to the Export Template**

For certain records in Acumatica ERP, the primary keys on the database level differ from the primary keys on the application level. For example, a *Dashboard* record has the Name primary key in the data access class (DAC) and the DashboardID primary key in the database table. In previous versions, if a customizer used the XML import and export functionality to import records that had the same key fields as the existing records, the system added the records without checking for duplicates. If the customizer then tried to view, modify, or delete any of these duplicate records, an error occurred. To resolve this issue, the customizer had to remove the records from the database.

In Acumatica ERP 2025 R1, the export template has been modified to prevent the duplication of records during import. Version 4 (the format-version="4" attribute; see Item 1 in the following screenshot) of the XML schema provided with Acumatica ERP now supports the new unique-key attribute (Item 2). The system uses this attribute to check for duplicate records. The attribute can be specified for parent and child tables.

Figure: The updated elements of the XML definition

A unique key can contain multiple fields if it is a composite key.

# Updates to the Import of Records

The changes described in this section have been made to all forms that support the XML import and export functionality.

When a customizer imports an XML file, the system now verifies whether this file contains any of the unique keys of the database tables from the export template. If the file does not contain a unique key, the system adds this key. The system then checks whether a record with the same unique key exists in the system. The system searches for these records by using the primary key and the unique index from the database (as in the previous versions), as well as by the unique key from the export template.

If only one record is found in a parent table, the system displays a warning that this record will be overwritten (see the following screenshot). If the customizer confirms the operation, the system replaces the unique key of the existing record with the unique key of the imported record.

Generic Inquiry	ic < >	ы			D NOTES PL	ES CUSTOMIZATION TO	iols -
+ Impuly Title Site Map Title Workspace Category		P	Bhow Deleted Recards Bhow Archived Records CEssons via OData		Accords Parameters for Select Tap Records per Page Espent Ter	3 culumos B recordo B Recordo	•
Scientifi DATA SCUPICES RELATIONS	PARSALETERS	The fo Denigr 250ftc Name the file	Bowing record will be overwritten: 10. 1525a/54/595-4934-9404- eb0388, UnipueKey2. Do you want to import 17		Albech Notes Te	Net Applicable • ENTRY POINT	
Row Byte	• /	1000	VES NO				
B B D Active Object	Data Pasta		Scherna Field Wit	enh. peth	Style Visibia	Default Nanigate To Navigation	

Figure: The overwriting of an existing record during import

If multiple duplicate records are found, the system displays a warning about these records (see the following screenshot). If the customizer clicks **Yes** in the **Import** dialog box, the system then processes the duplicate records depending on the link type and attributes specified for the parent and child tables in the XML schema.

Generic Inquiry □ ∽ + □ D + K <	х ж	D NOTES	FILES CUSTOMIZATION TOOLS -
Impulty Title     Site Map Title     Workspace     Category     Screen ID	Import × The following duplicate records have been found by the key fields in the following tables. The GDesign table DML DesignD 7e959c3e-a4b-4637-a695-61364ec68a18, Name UniqueKay2, NoteID: 65eaa5c1-6c33-411-600-00155638104 UniqueKay2, NoteID: 65eaa5c1-6c33-411-600-00155638104 UNIQUE DesignD 7-156-541-569. Note: N	larration in Page a Te	3 columns 8 records 8 9 Records Not Applicable -
DATA BOURCES RELATIONS PARAME	UniqueKey2, NoteID: dc:31096-8ca3-ef11-6406-00155d381104 D01 DesignID: 7e145c3e-a8t6-4317-adt7-31346ec00a18, Name UniqueKey1, NoteID: de665565 (ca1-ef11-a400-00155d381184 De you want to continue importing the file? VES NO	LTS GRID	ENTRY POINT
Ó + ∺ H Ⅲ B B D Active Object Des	Field Scheme Field Wolfs S	tyte Yaste	Default Resignate for Newsgatter

Figure: Detection of duplicate records

### Changes to the Publication of a Customization Project

The system also checks for duplicate records during the publication of customization projects.

Suppose that an item in a customization project has the same key (the primary key, the unique index, or the unique key) as the records that exist in the system. When the customizer publishes such a project, the system displays a warning and overwrites the existing records with the item from the project (see the following screenshot).

<b>Customization Project Ed</b>	itor						Back	Fickor	
File Publick Extension Library	Startig Cardial								
XMLUpdates •	Edit Project Item	(							ŝ
Screens	а и сетем	OKAGE							
Calls	W & classifiers	Test.	Tracington .	Could by	Counter Date	Last Weddind By	Lost Monthle	110	
Film Minister O Film	2 B Cat D1	GenerotroparyScreen		Kinterly Gibbs	11182824	Kimberly Gibbs	11/16/2018		1
Generatic Respektive (1) Regions Dariboards Site Map Dariboards Stripps System Lanaks Inguest Export Scenarios Stared Filem Access Rights Web Stared Filem Access Rights Web Service Exspects Adaption Exspects Adaption Exspects Scenario	Same Topological States Dagitadore The Ad	e Desgeller felt 3556 - after - Gib John - Theodowing - Station - T an Chartelline and - T - Descher Giff die Landfor - T Michaer 1 in Chriff die Landfor - T Michaer 1	Little (1995) (1997) Anto Confere Dataser 11 Neurol Toronto II 11 Neurol Toronto II 11 Neurol Toronto II 11 Neurol Toronto II 12 Neurol II 13 Neurol II 1	Namer Cast GH File-CoC MassRootsLipdent V Statt Misser 78 Data Methanan r Y Regardent T D samer Wilte shcOf Data Ig	sort: T. FageStar: T. P. Y. HaseAdom/Ob W. Grager: T. a. G. Owebber Conto per "strig" Digita/Ken	Pressy Goosed Channer AMOD scotted realised "IF Expensive Inter-theatition" Detailigent "At en"Waterbacks of Detailigent "At	8007 6004a=17 19 17 Calipare*		
Consister		-Silika Davida - "Fishkar"	Contraction of the	the second second second second	Sector Realition of the	har Distriction - Then Plan	-	-	13
Construction of the original field of	the Mariabal Inclusion In							14	23
1000-12-0 1217/01.000 Carelia 2000-12-0 1217/01.000	200 The detailess g the detailess meets (suggisted examples index (suggisted examples index (suggisted examples of the suggisted examples (suggisted)).	Anne herr Yound by the by ei Cout dil, Mutalli Tiedt I Cout dil, Mutalli Tiedt I Cout dil, Antalli Almar I Fact dil, Antalli Almar Ja	y fields in the ful de digt of 1 def de digt of 1 def de digt of 1 deg f ded of 1 deg d	anting tables antistation tissation tissation tissation					
nartoelletion project published a	screetfully. The law cla	to the tompilation parm.							
Obse Compilation pare									1

Figure: Warning during the publication of the customization project

# Platform: Improved Licensing for Anomaly Detection in Generic Inquiries

Acumatica ERP 2025 R1 introduces improved license management for the *Detection of Numeric Anomalies in Generic Inquiries* feature. (You can find detailed information about this feature in the topics of the *Detecting Anomalies in Generic Inquiries* chapter.)

## **Licensing Updates**

In Acumatica ERP 2024 R2, the license limited the number of generic inquiry rows processed per day to 1000. Also, the following limitations were imposed:

- Number of generic inquiries processed per day: 10
- Total number of records sent for processing per day: 1 million

In Acumatica ERP 2025 R1, the license includes parameters that track the number of processed generic inquiries and generic inquiry rows. Also, these parameters have been removed from the web.config file.

## **Viewing of the Consumption Statistics**

An administrative user can now view the consumption statistics for the feature on the *License Monitoring Console* (SM604000) form. The **License** tab of the form (**System Constraints** section) shows the limits specified in your license for system resources based on your license tier. The new license limitations are shown in the following screenshot.

icense Monitoring Console		c	USTONIZATION	100
ICENSE STATISTICS WARNASS CONSTR	WANT HELTOPIC			
License Status	Valid			
License Tier	E Series, Ter 5			
ICENSE DETAILS	The second	SYSTEM CONSTRAINTS		
Monthly Number of Commercial Transactions	500000	Maximum Nomber of Web Services API Users	50	
Monthly Number of ERP Transactions.	10000000	Maxmum Number of Concurrent Web Services API Requests.	16	
Database Storage Included (GB)	999	Maximum Number of Web Services API Requests per Minute	500	
ECOMMENDED MAXIMUMS		Maximum Number of Lines per Transaction	5000	
Delty Commercial Transactions:	25800	Maximum Nomber of Serial Numbers per Discovert	10000	
Daily ERP Transactions	500000	Maximum Number of Employees Paid by Month	250	
Consument Users	150	Maximum Number of Staff Members and Vehicles	100	
		Maxmum Number of Appointments per Month	20000	
		Maximum Number of Dark Feed Accounts	10	
		Maximum Number of Generic Inquity Roves Checked for Avenalies.	1000000	1
		Maximum Number of Generic Impulses Checked for Anomalies In D.	10	

Figure: License limitations on the License Monitoring Console form

On the **Constraint History** tab of this form, the user can see how much data has been processed. On this tab, the **Generic Inquiry Rows Checked for Anomalies in Day (% of Limit)** and **Generic Inquiries Checked for Anomalies in Day (% of Limit)** columns have been added (see the following screenshot). The columns display the total number of processed generic inquiries and their rows for the selected day, as well the percent of the daily limit.

License M	Ionitoring Cons	ole		CUSTOM	ZATION TOOLS -
LICENSE	STATISTICS	MARNINGS CONSTRA	INT HISTORY		
Per Tenant					
E Date	Active Bank Feeds (% of Limit)	Generic Inquity Rows Checked for Anomaties in Day (% of Limit)	Generic Ingüiries Checked for Anomalies in Day (% of Limit)	Appointments by Month (% of Limit)	Staff and Vehicles (% of Limit)
> 12/24/2024	0 (0%)	8595.(1%)	3.(30%)	0 (0%)	46 (23%)
12/23/2024	0 (0%)	0.(0%)	0.(0%)	0 (0%)	46 (23%)

Figure: The updated Constraint History tab

Each number in the columns is a link that a user can click to open the new **Anomaly Detection Usage Statistics** dialog box. This dialog box contains the list of processed generic inquiries and the number of processed rows for each inquiry (see the following screenshot).

A	nomaly Detect	ion Usage Statistics			
L R	icensing restriction pecified on the Site	is and processing statistics use the time e Preference (SM200505) form or User	zone of the server on which the Acumatica Profile (SM203010) form may differ.	ERP instance is deployed	f. Time zones
De	ta:	12/24/2024			
	0 1 1				
-	Date	Tenant	Generic Inquiry	•	Rows Processed
>	12/24/2024	4	AP-ML-Costs in AP Documents		1887
	12/24/2024	4	PO-ML-Costs in Purchase Orders		593
	12/24/2024	4	SO-ML-Sales Order Margin Analysis		4893
					OK

Figure: The Anomaly Detection Usage Statistics dialog box

i

The statistics are calculated according to the time zone of the server with the Acumatica ERP instance.

The user can view the statistics for the instance and for each of the tenants. Note that license limitations are applied to the instance, not to each tenant separately. If any of the license limits are exceeded, the system now displays the appropriate message on the *Detect Anomalies in Generic Inquiries* (ML502000) form.

# **Platform: Extended Support for Date-Relative Parameters**

Acumatica ERP 2025 R1 introduces support for relative date selection in import and export scenarios and automation schedules.

## **Support of Relative Dates in Integration Scenarios**

In previous versions of Acumatica ERP, if a customizer wanted to specify a relative date in an import or export scenario, they needed to select the **Is Relative** check box and then select a date in the **Value** column. The **Is Relative** check box was available in the following locations:

- On the Target Restrictions tab of the Import Scenarios (SM206025) form
- On the Source Restrictions tab of the Import Scenarios (SM206025) form
- On the Source Restrictions tab of the Export Scenarios (SM207025) form

In Acumatica ERP 2025 R1, this check box has been removed. To select a relative date, the customizer can now select one of the following standard options in the **Value** column of any of the above-listed tabs:

- *@Today*: The business day.
- @WeekStart and @WeekEnd: The start and end, respectively, of the current week. The start and end of the week are determined according to the default system locale or the locale the user has selected when signing in to Acumatica ERP.
- *@MonthStart* and *@MonthEnd*: The start and end, respectively, of the current month.
- @QuarterStart and @QuarterEnd: The start and end, respectively, of the current quarter.
- @PeriodStart and @PeriodEnd: The start and end, respectively, of the current financial period.
- @YearStart and @YearEnd: The start and end, respectively, of the current calendar year.

The customizer can also specify one of the options listed above followed by + or - and the number of days to be added or subtracted from that date. For example, the customizer could do the following:

• Indicate the previous day by selecting *@Today* in the Calendar dialog box (see Item 1 in the following screenshot) and then type -1 in the **Value** column (Item 2).

The customizer opens this dialog box by clicking the Calendar button in a date box (Item 3).

• Specify a relative date in the past or in the future by specifying values such as @Today-2 or @Today+4.

Import AR Invoices	+ 0 0	) + К	$\sim$	H VEV	OCREEN	PUB	25H T	D THE		Arcial	443	D HOR	a nuain	o cuarowania	n TOOLS
Hame     Sound Hame     Sound Hame     Proble     Proble     Type Type     Montree     Montree     Montree     Montree     Montree     Montree	Import AH Immun Menteus and Iller ImportExport AR AR Immices Full	n ma Invideas	4 4 9 9	Active Site Map Tel Vicebapece Calegory Farmed Land	i lingin kan	**	Rame	in (Pass				p.		Parabel Processe Invalid Processe Invalid Processe Decard Processe	ng ci Target cifesoit
0 + x H	8			1											
B B D Arres Inc	1949	The Res		Candidon	1.94							600 Z		<b>Backeta</b>	Same.
0 .		Due Date		Equilit	0	<b>Today</b>	0				0			4	And
					5		Janua	9	1.26	8 -	. A	e) loopy D			
					1	1	-	Ten .	1	2 3	1.14	@ViekEnt @ViekEnt @NontClart			
					4			. 7		9 10	. 11	@Moniteding			
							13	14	15	16 17		@OuarterStart			
					4	19	28	21	22	25 24		gouteEnt			
							27	26	25	30 31		@Paindint			
							- T			- · ·		@rearDet			
							. ÷				_	greated			
						19000		_	_		_				

Figure: Selection of a relative date on the Import Scenarios form

On the **Source Restrictions** tab of the *Import Scenarios* form, the Calendar dialog box is available for a field only if this field has *DateTime* selected in the **Data Type** column on the *Data Providers* (SM206015) form.

### **Support of Relative Dates in Automation Schedules**

In previous versions of Acumatica ERP, the customizer needed to perform similar actions to those described in the previous section to select relative dates in automation schedules on the **Conditions** and **Filter Values** tabs of the *Automation Schedules* (SM205020) form.

In Acumatica ERP 2025 R1, the **Relative** check box has been removed from these tabs, and standard date-relative options have been added. The customizer can now specify a relative date in the same way as the previous section described.

# Platform: Support for the Numeric Attribute Type

Acumatica ERP 2025 R1 introduces the support of numeric values for attributes.

## Support for the New Attribute Type

In previous versions of Acumatica ERP, a user could not specify attributes that contained numbers.

In Acumatica ERP 2025 R1, the new *Number* control type is supported. The user can use this type to create attributes with numeric values.

Users can select attributes of the *Number* type on the **Attributes** tab of all forms that have this tab, such as *Vendor Classes* (AP201000). Also, these attributes can be selected in the **User-Defined Field Parameters** dialog box on all forms that support user-defined fields, such as *Shipments* (SO302000) and *Leads* (CR301000).

### **Changes to the Attributes Form**

On the *Attributes* (CS205000) form, the *Number* option has been added to the **Control Type** box (see Item 1 in the following screenshot). If the user selects this option, the new **Decimal Places** box becomes available (Item 2). In this box, the user can specify the number of decimal places (0 through 8) that an attribute of this type can contain.

		NOTES	FILES CI	USTOMIZATION	TOOLS -
Attributes					
E ら + 直	Û v K	< >	ы		
* Attribute ID:	SERIAL	Q			^
* Description:	Numeric attribute				
Control Type:	Number	~	0		
	Internal				
Entry Mask:					
Reg. Exp.:					
Decimal Places:	2	2			
o + × ⊷	x t				
Walue ID     Second se	Description			Sort Order	Disabled

### Figure: The updated Attributes form

If the user specifies a number that is greater than 8, the system replaces the entered value with 8. If the user specifies 0, the system will use an integer value for the attribute. By default, the value in this box is 0.

# **Platform: Other Improvements**

Acumatica ERP 2025 R1 introduces the improvements to the platform functionality that are described below.

## Maintenance Mode During Snapshot and Tenant Operations

Starting in Acumatica ERP 2025 R1, administrative users must switch on maintenance mode before copying tenants and creating or restoring snapshots. (For more information about these tasks, see *Tenants: General Information* and *Snapshots: General Information*.) The activation of this mode is crucial because these operations temporarily disable database constraints, which can endanger data consistency.

In the new version, if a user attempts to copy a tenant or create or restore a snapshot on the *Tenants* (SM203520) form, the system prompts them to activate maintenance mode, as illustrated in the screenshot below.

Tenant ID	2 Company	Q				
• Login Name	Company	Copy Tenant	×	F		
SNAPSHOTS SNA C X IMPORT	PSHOT RESTORATIO	All Do you want to	of in maintenance mode. s can lead to data re copying the tenant, nance mode for all sites dates (SM203510) form open the form?	MAT	EXPORT SHAPSHOT 8	
6 D Harra	Description 1	Pi OPEN	CANCEL		Secant ID Customization	la Rafe

### Figure: A prompt to activate maintenance mode

When the user clicks **Open**, the system opens the *Apply Updates* (SM203510) form, where they can switch on maintenance mode by clicking **Schedule Lockout** on the form toolbar. The user must then specify the date, time, and reason for the lockout in the **Schedule Lockout** dialog.

After the tenant has been copied or the snapshot created or restored, the user should switch off maintenance mode by clicking **Stop Lockout** on the form toolbar of the *Apply Updates* form.

## **Profile Entities in Search Results**

Beginning in Acumatica ERP 2025 R1, search results displayed on the **Transactions and Profiles** tab of the Search workspace prioritizes records of the following entity types:

Entity	Data access class
Business account	PX.Objects.CR.BAccount
Customer	PX.Objects.AR.Customer
Payroll employee	PX.Objects.PR.PREmployee

Entity	Data access class
Contact	PX.Objects.CR.Contact
Vendor	PX.Objects.AP.Vendor
Employee	PX.Objects.EP.EPEmployee
Lead	PX.Objects.CR.CRLead
Inventory item (stock or non-stock)	PX.Objects.IN.InventoryItem

# Projects and Construction: AIA Report with Time and Material Lines

The American Institute of Architects (AIA) report is a standardized report form that is used for billing purposes in the construction industry. In previous versions of Acumatica ERP Construction Edition, users could include only progress billing lines of pro forma invoices in the prepared AIA reports.

In Acumatica ERP Construction Edition 2025 R1, the AIA report functionality has been enhanced. Now users can include time and material lines of pro forma invoices in the AIA reports in addition to progress billing lines. The following sections describe the process of including time and material lines in AIA reports and list the UI changes that have been introduced with this functionality.

## **AIA Reports with Time and Material Amounts**

To include time and material lines in an AIA report and prepare the report, a user performs the following general steps:

- 1. The user runs project billing for a project on the *Projects* (PM301000) form or *Run Project Billing* (PM503000) form to prepare a pro forma invoice.
- 2. The user opens the prepared pro forma invoice on the *Pro Forma Invoices* (PM307000) form. On the **Time and Material** tab, cleared check boxes in the **Include in Progress Billing** column (shown below) for the time and material lines indicate that the lines have not been added to the progress billing yet. The **Revenue Task** column on the **Time and Material** tab indicates the progress billing line to which the time and material line corresponds. The system automatically inserts a revenue task in each time and material line that has been created automatically during project billing or added manually by a user.

Helphan - Marinet Barrana Frank Concern Garne The Concern Con	-							
Anna and a second secon	approximation of the second se							
Name of Control of State of St								
makes and the second state of an annual second second								
6 + a minimum meteric sectorarial scotte	record dates introduced the second	and in R	4					
All a second the second the board						10 M		19 4
+ A 1	in the state of th	ne lines	ALC: 10.0	Links to	1 100 1000	ante include	100	108
A 2 MARKET R MM. MIC INVESTIGATION	termine .	10.4 1.44.4	100 min 100	10000.00	-10 100			4.05

Figure: Pro forma invoice with time and material lines

If the project task in a time and material line has the *Cost Task* type and the corresponding cost budget line has no revenue task specified on the **Cost Budget** tab of the *Projects* (PM301000) form, the **Revenue Task** column remains empty by default. A user should specify the corresponding revenue task in this line manually.

- 3. On the **Progress Billing** tab, the user loads progress billing lines by clicking **Load Lines** (if the lines were not added automatically during the billing procedure).
- 4. The user transfers the time and material amounts to the respective progress billing lines by doing either of the following on the **Time and Material** tab:
  - Selecting the **Include in Progress Billing** check box for the particular lines to be included in progress billing and, thus, in the AIA report
  - Clicking the **Include in Progress Billing** button on the table toolbar to include all lines in progress billing and in the AIA report

In each line, the **Progress Billing Line Nbr.** column indicates the line on the **Progress Billing** tab this time and material line corresponds to (see the following screenshot). The **Amount Included in Progress Billing** column shows the amount that was included in progress billing.

History - American Barrier Francisco Career N 2										2404.4	munai	tor come
Marcola         Marcola         France         Difference         Marcola         France         Difference         Marcola         France	11111											
statement basedone too terms which serves												
5 4 4 DOMESTIC STRUCTURE OF THE ADDRESS OF THE DESIGNATION OF THE DESI			1.1	1							-	
		-	-	and it is	15	-	1.7		-		1	
rail and a second but beinger	arrests .	- 44	1000		ine .	10.00	- 100	10.000	1000		10.00	all reads
A 1 H MARKET M. MARK. MARK Andrews	and the second	10.0	1000	mil. and		14.30		100.000	-	*		

Figure: Time and material lines to be included in the AIA report

On the **Progress Billing** tab, the **Time and Material Amount** column indicates the total amount of the time and material line that corresponds to a progress billing line, as shown in the following screenshot.

-	7 - Mar	nut Borrow	TURN Conumb	Duim															Uman	-1710748
+		n. +.	B	e . = 🗖	-	-	ner selection	- enter												
111111	1.11		HH HH	ilin 1	And Long 1 All Calences ( Calences)	12 M														
-	-				-	-	100													
5.4	1.00		+ # 1																	
64.3E	-	-		-		12	-	-	-	-	-	1000	-	-	10	-	-	-	-	-
14.5	1	Automate .	READING	*	-	-	inner	198	1.198			7446	100	1.60			100	1.44	1000	10444
14.12		annet ter	and the second	-	and the	4-14	Pegal Brogenet	1004	10,000			448	10		100		140.	1.00	-18	310
4.15		menant!	abuna.	44	-	4444	Section Paint 1	1044	40.014			-148	418	1.14	40	-	140	144	-144	1.00
+ 2		Approx. (a)	AUTOM.	44.			Decision in succession	100.0	101004.00			. 444	1.00	1.00	100	10.00	141		1.00	144
4.11		when?	ADVONE	.86		01.04	Card and Family into	144	70,078-44			1.00	8.00	1.0	18	Don's H	10	1.00		
4.1		defended.	AUXINE		1041		Paint scrame	100	1.00		100	100	100	1.00		1.0	1.00	- 44	1.000	1.000
14.15		minial	10000			44.44	the baseline	140	provided and			4.00	146	1.00	14	at 100 M	144	10	140	3.66

Figure: Amounts transferred from time and material lines to progress billing lines

5. Finally, the user clicks **AIA Report** on the form toolbar to prepare the AIA report for the pro forma invoice. The resulting report includes the amounts of the time and material lines, as the following screenshot shows.

c	ONTINUATION SP	EET					4	Ac	umo	tic	a				in in	
150	ucanok laisi celehekune luitur is atlahet	a FOR MUS	ENT Loniarroy C	attactor to any	-							NON	avoid altucition replica	140 140 140 140 140	PRODUCT BIET TECTODOR CETRODUCAT	
		-	ONCASE	-	California	-	REMARK		WORK COS	ecinia		in the second	SULAL		-	-
-	DESCRIPTION OF WORK	GIV	ACHEDULATIN VALUE	are	oncess	674	SCHEDULED MILLE	PREMOUS	PREVIOUS	PERIOD	14170800	BUTENALS A	NO STORED TO GATE	Care	riston	16.0
10	SEMINAL RECOMMENTS	4,501,00	DHLITER	1.00	34.94	6.01.00	100.US H	1.00	30 mi	1.00	34-400 III	10.00	34,435,10	115	2301-175-36	3442.50
2	B NO GRA	2 101 10	111110-00	1.00	10.00	1.61.0	LTTL/MARK	1.00	20.00	1.00	10.00	11.00	11.00	115	1111 110 10	11.00
	CONCINETE	1.06.00	1101206-000	1.00	34.06	11.096-00	\$105,298,200 IN	1.00	30.60	1.00	20.00	10.16	30.00	115	2104.296.500.00	10.00
	him	15,015,00	VOLATING.	1.00	8.0	-	THE REPORT	1.0	80.00	1.00	\$4,000.00	10.00	\$1.400.00	115	THE PLANE	NAME OF

Figure: Time and material amounts included in the AIA report

i

To remove previously added time and material lines from the AIA report, the user either clears the **Include in Progress Billing** check box for particular lines or clicks the **Remove from Progress Billing** button on the table toolbar of the **Time and Material** tab of the *Pro Forma Invoices* (PM307000) form to remove all lines.

### New Tab on the Side Panel of the Pro Forma Invoices Form

On the side panel of the *Pro Forma Invoices* (PM307000) form, the **Time and Material Lines in Progress Billing** tab has been added. On this tab, a user can view the time and material lines that are related to the currently selected progress billing line, as shown in the following screenshot.

PF09047 -	Marriett ibe	amutiy Hotela	Contraine	Quete	Be	11 3050	N P.M.	DVIDHDAD	pe 10048 +	H (COL)	0	0	H 10 T	ipens Kille	9-		1	; н
	n mand Gonar Notar Notar Notar Notar Notar				Parage and a second sec	rene and	Angen II Fragma	ny tan	140700 **********************************	Millin		- min []	tana fai ar Ing Line (In Ing Line (In)) Ing Line (In) Ing Line (In) In In) Ing Line (In) In In) Ing Line (In)	1 1 1 1 1 1	a des	11 II		
0 +	x LINE		# A			-	-	Taxad Barris	Annual In Annual									
	1.00	11000	3.10		110	1010	100	1.105.00	COMP :									
	1.05		8.00	HOLM	80.00	111	0.00	8.05	110									
	8.00	0.00	8.58	8.0	310	+ (4	8.98	4.04	10.8									
	4.00		1.01	HOUR	16.00	9.66	0.00	4.00										
	0.00			18	31.076.06	410	0.00	6.00	100									
	1.00	4.00	1.00		1.00	1.00	100	3.380.00	130.00									
+	1.00	10		13	81,010,04	110		100	100.0				Aver Classe	_	_			
											1.0	of the second	-					

Figure: The new tab of the side panel

### **Other Enhancements**

The following changes have also been made to support the described functionality:

- On the More menu of the *Pro Forma Invoices* (PM307000) form, the **Update Empty Revenue Tasks** command has been added. When a user clicks this command, the system automatically inserts revenue tasks in all time and material lines of the current pro forma invoice that have no revenue task specified.
- If a time and material line is linked to a revenue budget line and the **Use T&M Revenue Budget Limits** check box is selected for a project on the **Summary** tab of the *Projects* (PM301000) form, the system calculates the maximum amount that is currently available for billing the customer based on the billing limit amount of the corresponding revenue budget line that is related to the selected revenue task. For the time and material lines with no revenue task specified, the system calculates the maximum billable amount based on the project task in these lines.
- On the *Projects* form, the system now automatically populates the **Revenue Task** column in the newly added cost budget lines.
- The following UI elements, which previously were available only if the *Construction* feature was enabled on the *Enable/Disable Features* (CS100000) form, now appear unconditionally:
  - The Type column on the Tasks tab of the Projects and Project Templates (PM208000) forms
  - The Type box in the Summary area of the *Project Tasks* (PM302000), *Project Template Tasks* (PM208010), and *Common Tasks* (PM208030) forms

# Projects and Construction: AP Document Recognition for Projects

In previous versions of Acumatica ERP Construction Edition, the AP document recognition functionality did not support the project-related AP documents. Thus, if project accountants received emails with attached invoices related to projects, they had to manually enter project-related AP bills and AP bills for subcontracts in the system. These were a time-consuming and error-prone operation.

In Acumatica ERP Construction Edition 2025 R1, the recognition of an AP documents has been further improved to provide the automatic defaulting of project-related information and recognition of the subcontract numbers in the document lines. This enhancement simplifies and automates the management of AP bills for construction projects and increases efficiency and accuracy in tracking project-related expenses.

## **New Recognition Feature**

A new feature, *Recognition of Project-Related Documents*, has been added to the *Experimental Features* group of features on the *Enable/Disable Features* (CS100000) form.



This feature requires the AP Document Recognition Service feature to be also enabled on the form.

If the feature is enabled, users can now do the following on the *Incoming Documents* (AP301100) form:

- Select project-related data for project-related bills that are not linked to commitments. Users can manually populate the project budget key in the lines of the recognized AP document, if needed.
- Include project-related data in the bills linked to purchase orders with receipts or without receipts.

The system now recognizes purchase order numbers in the AP bill lines, links these lines to AP document lines, and automatically populates the project budget key in the lines of the recognized AP document based on the corresponding purchase order. Users can also link AP document lines to purchase orders manually if no exact matching document was found.

• Recognize the subcontract number and include project-related data in the bill lines linked to subcontracts.

The system recognizes subcontract numbers in the AP bill lines, links these lines to AP document lines, and automatically populates the project budget key based on the corresponding subcontract. Users can also link AP document lines to subcontracts manually if no exact matching document was found.

The following screenshot shows a recognized AP bill that is related to a purchase order. The system has linked the purchase order and purchase receipt to these lines and inserted the project budget key (project, project task, and cost code) in both lines.

ISL_Purchase_Orde	r_10.pdf			C works	C. Paulini	CUSTOMEATON TOOLS +
+ + ≘ к	C > > BAVE AND CONTINUE	BEARCH FOR VENDOR	i i i i i i i i i i i i i i i i i i i			
Data Tga • Vesta • Loota • Data	Perception III • III III. • Hearingtonal Integrated Solution D MIGN - Primary Lensition D PRODUCTICLE - Products Whoteware D III.0000000000000000000000000000000000		95		Residu Reg Poldur 11218 SL 8* Suite 142 Refer	n PO Naniber PO002512 Institute 24552 Its Bantike Jahuary metica 10,3025 Bate
Due Date Venier Ref. Description	+	Harm Number	Rest Description	Amile Cost	50W Ge	1004 aantiity Lina Total
Ostal Titul Ansure	675.08 675.00	ANALYSIS ANALYSIS	Residement analysis Repursement analysis	50.00 70.00 Total	HOUR I	1 290.00 6 420.00 935.00
				Ralaxia Dat (192)		\$470.00
0 + × 81	UNKPOLINE UNKSUBCONTRACT	ANPPING OPTIONS + H				
E Alternate measurer 1 10	l hereichte bezit	inerthy 10M Ind Cost	Ext. Com *Preset	Project Teal Coal Coal	PC Notestar	PO Receipt Subcontract Non Nor.
ANALYSIS MUNLYSIS	Repairsment analysis	5.00 50.00	254.00 REVRECCO	0104583 81-304	P0002512	PR012471
F ANALYSIS ANALYSIS	Requirement analysis	8.08 70.00	428-38 REVRECCO	11045KT E1-309	P0002512	F9002471

### Figure: A recognized project-related bill

When the user clicks **Save and Continue** for the recognized bill, the system creates an AP bill and opens the *Bills* and Adjustments (AP301000) form with it (see the screenshot below). The bill lines are added to the **Details** tab. For the direct AP bills, the system copies the project budget key along with other line information. For the projectrelated lines linked to purchase orders, the system also copies the purchase order and receipt numbers to the **PO Number** and **PO Receipt Nbr.** columns, respectively. For the project-related lines linked to subcontracts, the system copies the subcontract number to the **Subcontract Nbr.** box.

B# 005558 -	Internatio	onal Inte	egnated Solutio	215					C) Hors	a Acrivitaia	F648.01	CUSTOM DRIVEN	100.8 +
6.2.2	0	+ 1	D + K	< >	N REMOV	нош							
Tan Rates of RE Table - Date - Fost Fanal - Venter Fan	84 000008 01400 1010020 10.0020 10.0020 140001	4 U B	Venile + Localizer - Carlenny + Tarris, Project - Tarris, - Carl Discussed	15. Secondar MAN. Presay USD (2 1.0) SRD - 30 Days REVRECCO (1 1917/2005 (2) Data freese	al sergenet for parties - MON DAppet with change DAppet for Office to Law	ion / p skis p skie / p	Josef Tale Lee Decemb Decemb Decemb Research Amager Tan Tale Web Tale Decemb Cash Decemb	0 0 0 0 0 0 0 0 0 0 0 0 0 0	00 00 00 00 00 00 00				
Description DETMAR	anacos	1041	APPROACH	UNCOUNT				CONTRACT	ATO FOUND	400 5000	ATEACTINE		
8 8 D 18mm		-	il Tyras	San Depair	Generally	000	(Pril Loss	Exe Goal 77	reject	Propert Taxe	Cest Cest	Annal .	- Desmart Armant
F & D #800	MHOLE:	ANNES -	S Depre	energiant insertion	1.00	HOUR	60.00	297.00	EVALUCE -	BETABATE	25.304	250-35	1.00
B D PROD	AHOLE	MALTS	h Roque	ensent analysis	4.00	HOUSE	70.00	600.00 #	EVRECCO	DI DARCI	- 01-309	420-00	0.00

### Figure: AP bill created from the recognized document

If the system did not link the line automatically to a subcontract line (for example, if multiple options for linking are available), a user can link the line by clicking the line and then clicking the **Link Subcontract** button on the table toolbar. When the user clicks this button, the **Link Subcontract** dialog box opens with a list of subcontracts. When the user selects the corresponding subcontract line and links it to the AP document line, the system automatically populates the project budget key based on the subcontract.

For more information on AP document recognition, see AP Documents from PDFs: General Information.

# Projects and Construction: Enhanced Usability for AP Documents with Multiple Projects

In Acumatica ERP 2025 R1, the accounts payable, purchase orders, and subcontracts functionality related to working with multiple projects has been reworked and enhanced. The user experience of working with the single-project and multi-project documents has been streamlined. The introduced changes simplify data entry for single-project documents, provide flexibility for multi-project documents, and enhance the reporting capabilities.

## **UI Changes**

On the *Accounts Payable Preferences* (AP101000) form, the **Require Single Project per Document** check box has been removed. Now users can specify one project, multiple projects, or a combination of any number of projects and the non-project code in the lines of a single AP document, purchase order, or subcontract.

### **Documents with Multiple Projects**

Now if a document relates to multiple projects or to at least one project and non-project code, the system shows <*Multiple projects*> in the **Project** box in the Summary area of the following forms:

- Bills and Adjustments (AP301000)
- Purchase Orders (PO301000)
- Subcontracts (SC301000)

The following screenshot shows a bill that has two different projects specified in its lines on the *Bills and Adjustments* form. The **Project** box in the Summary area indicates that the document is related to multiple projects.

Bill 002368 -	Concrete Su	pply Co.	<b>c</b> >	н. —						Diverses	KCTUPES PL	ALC: 200706	KONTON TOOLD
Type Robusco Mor Stato Data Paul Ponal Venda Rat Dataphin	64 - 50344 - Good 011203 53428 53428	Verder Looden Darwery Sana Paalat Dar Dare Cath Docume	CONCRETISION Marks - Process UND - 140 Markstei Process (0011020) (0011020) (0011020)	- Converse Trapity CA Incodes - Valley facility - Payling Line	222222222	ni Teni a Disawete arrest Disea arrest Jamat Teni te Teni arrest arrest arrest arrest arrest arrest	9.35.8 5.5 5.9 5.9 5.9 5.9 5.9 5.9 5.9 5.9 5.9						
ienes a	mental 0	and investorial	DOCUMENT	APPENDE		-							
0 /												- H - W	1.11
H D D Then	6. Dis	ers's Tessaler	Deses	Gardy Cliff	- 100	Rei Colt	Danner	( Armond	"Automat	Description	* biamont	"Time!	Peperhan
T. N. D. HRODA	ment cat	Barriel Concelle Re	any the	THE EA		11,153,00	1.00	11,710,02		COST - Investory	00.000	CETREM	
B [] (Recco	WHOLE LAD	INCL FOR FOR	10.7X1	5.000.00 LT.	5.58	296240	0.00	2 908 98		COG5-Inventry	888-000	CSTWNEST	81

Figure: A bill with multiple projects in its lines

### Improvements to AP Documents with Retainage

The lines of retainage AP documents now contain all project-related information (project, project task, and cost code) from the original bill lines, as the following screenshot shows. This change helps users to ensure consistency and facilitates detailed subcontract audit reporting.

BH 005558	- Surlech	Concret	ie :												
+ =	1 n	+ 1	0 + H	6.3.3	100003-0003	11									
Ter.		-	quant.	SIN'E(1)-Suite	di Emereter di	1 100	a bio	11.016.25							
Petersta III	-		+ Columbia	MAR-Peners Lo	. A. 196	1.04	University .	0.00							
inter .	canal.		a Catwood	100 P 191	· VEW BALE	1.04	inter Think	0.00							
+bay	192025	0	+ 3mm	340 - 31 Gapt			and beaut	0.00							
+ Pastford	81-815	4	Prest	catiencia-ha	gier Custom Huma -C. J	1.36	Tine .	4.15							
Datase Dat.	1447		+Dellas	JADUS	Children Personnel	1.00	. See	4.00							
			+ Lab Denue	JADEN T	The Try Street	. And		16,006,28							
				Destrates		1.04	( Dame	0.00							
Designer	Factoria	-													
replace.	revenue.	140	C ( 41990063	- monater.	Average of	(period									
0 -	1		400	PORCOPT 4	DEPO-REPUBLIC	40010	400 16800	ATAC A	DIVUME	400 5080	ONTRACTUM	UNIO	R. H. B.		
8 × 0 *m	-	-	D Financial	Part 1	and the		000.1000	Annual Views	-	* data man	Income	* Table is not	Trant	Prose line	Lan Dep
·	WHO.F	121800	B Reariage for	BRING NO.	147	1.00	15,268,26		11.016.30	11000	Reason Provide	100.000	CITRMOVE	89	15-38

Figure: A retainage bill with project information in its line

# **Other Improvements**

The users can now select or clear the **Pay by Line** check box in AP documents, regardless of whether they have document lines specified on the **Details** tab of the *Bills and Adjustments* (AP301000) form.

# Projects and Construction: Enhancements to the Correction of Pro Forma Invoices

In previous versions of Acumatica ERP, users were able to make corrections to released pro forma invoices that include only progress billing lines. On a user's attempt to correct a pro forma invoice that has at least one time and material line, the system shown an error message. Also, this functionality was available only if the *Construction* feature was in use.

In Acumatica ERP 2025 R1, the restrictions on correcting the pro forma invoices with time and material lines have been eliminated. The following sections describe the improvements to the ability to correct pro forma invoices.

## Workflow of the Correction of Pro Forma Invoices

Suppose that a user needs to correct a pro forma invoice with time and material lines and the invoice has already been released; the corresponding AR invoice has also been released and has the *Open* status. To create a new revision of the pro forma invoice, the user clicks **Correct** on the More menu of the *Pro Forma Invoices* (PM307000) form, as shown in the following screenshot.



Figure: Pro forma invoice to be corrected

The system creates a *correction pro forma invoice*: that is, a new revision of the pro forma invoice with the *On Hold* status and a line with the previous revision of the pro forma invoice in the **Previous Revisions** table on the **Financial** tab of the form, as shown in the following screenshot. The time and material lines need to be corrected; the **Time and Material Total** of the pro forma invoice has not been changed yet.

• 0 0	0	+ 8	K	<	>	1 123	AOVE HOLD	PRINT AIA	REPORT +++				
Raterence Nbr	000001	,p	Project		HAR	MARERYS	Juicers with t	ve installatio 🧳	Progress Billing	Total	0.00		
Status	On Hold		Custome	ē	HM	BAKERY -	HM's Bakery &	Cafe d	Time and Materia	el Tinist	5,700.00		
+ Involce Date	1/17/2025	0	+ Location		MA	N - Primary	Location	,p	Tax Total		0.00		
Post Period:	01-2025	P							Invoice Total		5,700.00		
Customer Ord									Retainage Total		0.00		
Application Nor.									Amount Due		5,700.00		
Description PROGRESS BIL	Invoice for	HMBAKE	RY6	Ū4	XES .	- MANCA	ADDRE	95E5					
Description PROGRESS BU AR INVOICE INF AR Doc Type	Invoice for	HMBAKE	RYE MATERIAL	Ū.	XES	rinancia _ n _	ADDRE REVIOUS REV Revision	ISES	Relationper	Tao Total	AR Doc.	AR fiel	RI
Description PROGRESS BIL AR INVOICE INF AR Doc Type AR Bat Nor AR On: Status	Invoice for LLING 1	IME AND	RY6	DA	XES	ninancia - n B	ADDRE REVIOUS REV Revolue	ISIES ISIONS Invesice Total 5,700.00	Retain-ope Total 0.00	Tan Total 0.00	AR Doc. Type Invoice	AR Ref. Nec.	Ri Tj
Description PROGRESS BI AR Doc Type AR Doc Type AR Rat Nor AR Doc Status • Dranch	Invoice for	Open	RY6 MATERIAL 2019 - Servic	DA	RES	- <b>P</b>	ADDRE REVIOUS REV Revolue	ISONS	Retainage Total 0.00	Tasa Tothai 0.00	AR Doc. Type Invoice	AR Gel. No.	Ri
Description PROGRESS BU AR Doc Type AR Doc Type AR Doc Status • Status Items	Invoice for	HVBAKE THE AND Open SWIELTER 30D - 30 C	RY6 MATERNE 2087 - Servic	Dk te and i	XES Equipme	- M - M 	ADDRE REVIOUS REV Reveales	ISES	Relationger Total 0.00	Tan Total 0.00	AR Doc. Type Invoice	AR Sed. Nix. 20207.8	Rit
Description PROGRESS BI AR DOC Type AR Doc Type AR Doc Status • Danct Terms Due Date	Invesce for LLING 1 TO	HUBAKE THE AND Open SWIELTE1 30D - 30 D 2116/2025	RYE MATERIAL 2017 - Servic Wys	DA Se and I	KES Equipme	- II - II 	ADDRE REVIOUS REV Bevrains 1	ISSES	Relativaçe Total 0.00	Tan Total 0.00	AR Doc. Type Invoice	AR Ref. Nor.	Ri
Description PROGRESS BU AR DOC Type AR But Nor AR Doc Status • Branch Terms Dae Date Cash Decount	Investore For	HUBAKE (ME AND) Open SWEETE 30D - 39 ( 2/16/2025 2/16/2025	RY6 MATERIAL DUP - Servic Nys	th te and i	ates Equipme	- n 1 2	ADDRE REVIOUS REV Revolues	ISONS	Retainage Total 0.00	Tas Total 0.00	AR Doc. Type Invoice	AR Ref. Nor.	Ru Ty
Description PROGRESS Bit AR INVOICE INF AR Doc Type AR Raf Nbr AR Ooc Status • Branch Terms Due Date Cash Discourt TAX INFO	Investore For LLUNG 1 FO	HUBAKE (ME AND) Open SWIETE() 2016/2025 2/16/2025	RYG BATERIAL 2017 - Servic Veys	te and i	RES	- <b>N</b> - <b>N</b> 	ADDRE REVIOUS REV Revolus	ISCNS Investor Tatal \$,700.00	Retain opr Total 0.00	Tan Toha 0.00	AR Doc. Type Invoice	AR Ref. No.	Ri Ty

Figure: The correction pro forma invoice that has been created

After the user has made all needed corrections to the time and material lines and the **Time and Material Total** is now correct, the user releases the new revision of the pro forma invoice. On release of this new revision, the system creates a reversing document, which is listed in the **Previous Revisions** table of the **Financial** tab, as shown in the following screenshot. The system also creates an accounts receivable document; the type, reference number, and current status of this document are shown in the **AR Invoice Info** section of the tab. The correction pro forma invoice is assigned the *Closed* status.

		1< < >	>I PRINT AIA REPO	ORT +++			
Reference No. 00000	P	Project H	MBAKERY6 - Julcers with	the installatio 🥒	Program Billing To	tai: 0.00	
Status Closed		Custamer. H	MBAKERY - HM's Bakery I	s Cafe 🧳	Time and Material	Tirtal 6,300.00	
Invoice Date: \$117/2	25	Location: N	WiN - Primary Location		Tax Total	0.00	
Post Period 01-202	5				Involce Total.	6.300.00	
Custamer Ord					Ratainage Total	0.00	
Application Nbr					Amount Due	6.300.00	
Description Involce	for HMBAKER	YG					
AR Doc Type	Invoice 000118		AR Dec. Type	AR Ref.	Reversing Doc. Type	Reversing Ref. Noc.	Description
PLPL PERF. THEM			investore .	000074	Courts Mana	803117	Includes for Links and
AR Not. Not.	On Hold		00000	and and a	COMPANY INSTITUT	ROLLL	stroke to respons
AR Not. Not. AR Doc. Status Branch	On Hold	NP - Service and Equipm	ent :		Creat Herry	ROLLI	anvoice for Platbourg
AR Not Not AR Doc Status Branch Terms	On Hold SWEETEQU 30D - 30 Dat	NP - Service and Equipro	ent:		COLUMN 1	REAL INC.	annoice for Pareprint
All Doc. Statue Blandt: Terme Due Date	On Hold SIVEETECK 30D - 30 Dat 2/16/2025	/IP - Service and Equipm	ent:			ROLLL	
All Poic Statue Branch Terms Due Date Cash Discount Date	On Hold SWEETEQU 300 - 30 Da 2/16/2025	/IP - Service and Equipm ys	ent :		0.001.0000	ROLL	
All Doc. Status Branch Terms Due Date Cash Discourt Date TAX INFO	On Held SWEETEGN 30D - 30 De 2/16/2025 2/16/2025	AP - Service and Equipm ys	ent:			NOLLI .	

### Figure: The correction pro forma invoice that has been released

On release of the correction pro forma invoice, the system automatically releases and applies the reversing AR document to the original AR document to completely reverse the previous revision and update project actual values. For more information about pro forma invoice correction, see the *Correcting Pro Forma Invoices* chapter.

### **Other Enhancements**

The following changes have also been made on the Pro Forma Invoices (PM307000) form:

- The **Correct** command on the More menu is now available for closed pro forma invoices regardless of whether the *Construction* feature is enabled on the *Enable/Disable Features* (CS100000) form.
- The **AR Doc. Status** box has been added to the **Financial** tab. This box shows the current status of the AR document that has been prepared for a pro forma invoice.

# Projects and Construction: Enhancements to the Cost Projection Functionality

In Acumatica ERP 2025 R1, the cost projection functionality has been enhanced, as described in the following sections.

# **Time-Sensitive Cost Projections**

Now users can create cost projections, calculate project margins, and analyze over- and underbilling for projects for a specific date. The new *Cost Projection by Date (PM305500)* form and the corresponding *Cost Projection by Date (PM3055PL)* list of records have been added.

When a user creates a cost projection on the *Cost Projection by Date* form, they select the project for which the cost projection is prepared and the date on which the cost projection will be calculated (shown below). The system automatically selects or clears the check boxes in the **Budget Level** section in the Summary area (see the following screenshot) based on the cost budget level specified on the *Projects* (PM301000) form. The user can clear any of the selected check boxes in the **Budget Level** section to prepare the cost projection with a less detailed structure.



Figure: New cost projection by date

On the form toolbar, the user clicks **Load Lines** to populate the budget lines to be analyzed on the **Details** tab (see the following screenshot).

100001-000	t projection for I	May, 2025	e.							1	O NOTES IN	EB 0,610
+ = =	0 + 1	ll is	< > >1	NEPRESH	COPY PRO	JECTION N	MOVE HOLD	111-5				
Reference Ner		100081		P	BUDGET	1000		BARRARY				
+Project		OTEL - The B	leach Hotel and C	indunisiums P	1 01-0	e Task		Rented Bull	pt.Farenat	- 207	195,467,00	
Project Current		290			C Asses	et Desai		Dist family	a.	32.6	67,202,74	
Project Manage	Print Manager Dies Values Status On Heat Status UT12026 []					tory D		Revenue But	lipit Backing	17.0	148,254,29	
Table	1	De Hald			Cart I	Date		Expected Cu	rard Revenue	4.1	01.516.52	
+Date		1152528 2	5		CALCULA	TION SETTINGS		Orebiling in	Uidenting	10.3	73.885.79	
+ Projection Date		110025 C	3		Dista	In Fanding CO In 1	Calculators	Projected Ma	nger .	5.	28.186.29	
Energian		Cost projection	to May 2525		E tank	to Project Durlant		Printed Ma	rgh (5)		0.47	
100,100.0	A REAL PROPERTY AND INCOME.											
O	VEW TRANSAC	Choks V Cred Even	Per Committee	Projected Projected Cost at Cost at	EN COMMITME Completion (%)	NTS VEW P	NANCE CHART Actual Crat To Date	H E	Antopolist	Cost Budget	Petersaia	Antoquant
C	VEW TRANSA Access Group	Chicks V Cost Cost	PEW COMMITMEN Fragecisel Control Company 26.006.005.11	Projected Cost at Completion	EN COMMITME Completed (N) 22.39	NTS VEW/ Response Cont 25,541,325,71	ALANCE CHART Actual Crait 10-3444	H 8	Antopologi Cont 16,296,207,32	Cost Surger Surger	Performance Phi 36.87	Anterganie Participanie Pri 95.07
	VEW TRAASAC Account Group	Choks y Coat Coat Coat Coat Coat Coat Coat Coat	PEN COMMITMEN Projected Crist to Compute 26.686.005.19 340.000.00	Projected Cost at Cost at Comparison 34,387,376,71 240,000,00	EN COMMITME Completent (N) 22.39 8.38	NTS VEW/O Response Com 20.541.029.71 246.000.00	NANCE CHART Actual Crast 1-Data 7,200,321,52 0.00	H 8	Anticipation Cont 16,296,207,32 8,56	Cost Budget Booling 24,341,358,15 245,000 20	Parturnation [%] 26.67 0.20	Anterpanto Performanto PSSS7 2.00
0	VEW TRANSA Account George LABOR LABOR	Choks y Cost Cost Cost Cost Cost Cost Cost Cost	PEN COMMITMEN Projected Crist to 26.686.096.19 26.000.00 216.000.00	Projection Projection Contral Completion 34.387.276.71 240.000.00 216.000.00	EN COMMITHE Companies Pri 20.29 1 10 1 20	NTS VEW/ Respected Corr 20.541.025.71 245.000.00 316.000.00	NANCE CHART Actual Crait 10-3446 7,200,321,52 0.00 0.00	H 8 Open LSHL95L80 8.20	Anticipation (Cont) 16,296,287,32 8,36 8,36	Cont Hadget Booming 24.841.558.15 245.000.00 214.000.00	Partnessee (%) 26.87 0.20 0.20	Antergane Performance Phil 55.17 8.20 8.20
0 +	VEW TRANSA Account Group LABOR LABOR MISC	CTICHS Y Cost Date 81.311 61.313 61.300	PEW COMMITMEN Control Control Control 26,686,895,19 245,000,00 216,000,00 8,00	ATS WEW OW Projected Cost at Cost at Cost at 240,000-00 216,000-00 16,000-00	EN COMMITME Companies (N) 22.39 8.10 8.10 8.10 10.01	NT3 VEW FI Respect Core 29,541,829,71 245,800.00 256,800.00 16,800.00	NAMCE CHART Actual Crail 1-346 7.700.371.52 0.00 0.00 15.000.00	H 8 C Oper C Ope	Antoniani Cont 14,299,207,32 8,30 8,30 15,000,00	Canti Burtupe Burming 24,841,558,15 242,000,00 216,000,00 0.00	Performance (%) 26.67 0.56 0.56 0.56 0.55	Anderganie Performance Pol 55.57 8.50 8.50 100.00
0 + = = = = = = = = = = = = = = = = = =	VEW TRANSA Account Group LABOR LABOR MISC	CTICAS V Cont Endre (m.511 (m.515 (m.515	PEW COMMITMEN Control Control 26.000.000.19 216.000.00 216.000.00 8.00 8.00	VEN OFF Projection Contrat Competition 34.347.276.71 240.000.00 216.000.00 15.000.00 15.000.00	EN COMMITME Completing (Pr) 22.29 1.10 1.10 1.10 1.10 1.10 1.10 1.10 1.1	NTS VEW/0 Restard Balgeor Com 26.54(L026.07 345.000.00 15.000.00 15.000.00	NAACE CHART Actual Char To Sam 7,700,371,52 0,00 0,00 15,000,00 15,000,00	H 8 Const LNR.945.80 100 100 100 100	Antergalant Exert 146,2495,267,32 8,36 8,36 15,000,00 15,000,00	Card Burget Rooming 242,800,000 2198,000,00 0,00 0,00 0,00 0,00	Perfections (%) 26.87 0.36 0.56 100.00 100.00	Anterganie Performance 70 55.07 8.00 8.00 100.00 100.00
0 + = = = = = = = = = = = = = = = = = =	VEW TRANSA Account Group LABOR LABOR MISC MISC	CTICAS V Cont Doly 01.511 01.511 01.515 01.505 01.605	Per connerties Cost in Cost in Control 26.000.000.19 300.000.00 216.000.00 8.00 8.00 8.00 8.00 8.00 8.00	VEN VEN OF Projecter Cost at Comparison 34.347.276.71 246.000.00 15.000.00 15.000.00 15.000.00 15.000.00	EN COMMITME Companies (N) 22,29 100 100 100 100 100 100 100 100 100 10	NTS VEW/1 Restart Despect Com 245.941.029.79 345.000.00 15.000.00 15.000.00 300.455.71	NAACE CHART Actual Char To Sam 7,700,371,52 0,00 0,00 15,000,00 15,000,00 15,000,00	H 8 CORE EX96395.00 E396 E396 E396 E396 E396 E396 E396 E396	Antergaland Exel 146,200,207,32 8,300 8,300 15,000,00 15,000,00 155,000,00 155,000,00	Card Burget Rooming 242,800,000 242,800,00 0,00 0,00 0,00 0,00 0,00 0,00 0	Perfectance (%) 25.67 0.30 0.54 100.00 100.00 35.71	Antergane Performance 01/ 05/07 00/00 100/00 100/00 100/00 20/71
0 +	VEW TRANSA Account Group LABOR LABOR MISC MISC LABOR	Chicks y Coat Eads 81.311 61.313 61.300 81.585 81.400 62.000	Per Connerties Contro Contro Contro Comparison 246,000,000 216,000,00 8,00 8,00 8,00 8,00 8,00 8,00 8	VEN VEN OFF Cost at Cost at Co	EN COMMITME Companies (N) 22,29 100 100 100 100 100 100 100 100 100 10	NTS VEW/7 Remark 28.541.025.7 245.000.00 15.000.00 15.000.00 382.455.71 10.000.00	Autoce Creatin 4:2544 Creat 16:2546 7:200.271.52 0:20 0:20 0:20 0:20 0:20 0:20 0:20 0:	H 30 C C C C C C C C C C C C C C C C C C C	Anton particul Control 146,2999,2807,322 8,300 155,000,000 155,000,000 155,000,000 155,000,000 155,000,000 155,000,000	Cret Burtyre Borning 24,841,358,15 242,800,00 216,000,00 8,00 244,803,30 36,500,00	Performance (%) 26.67 0.08 100.00 100.00 100.00 26.71 364.00	Antergane Performance 197 3557 8 00 196 00 196 00 196 00 36 71 406 00

### Figure: Cost projection with added budget lines

Then the user changes the value in the **Projected Cost at Completion**, **Projected Cost to Complete**, or **% Completed** column in the budget lines that should be analyzed. The system recalculates the **Overbilling or Underbilling** value in the Summary area of the form accordingly.

### Creation of a Copy of a Cost Projection

On the *Cost Projection by Date (PM305500)* form, a user can create a new cost projection based on an existing one. This updates the cost projection with the latest actual values from the project while preserving the manual changes that have been made to the **Projected Cost at Completion** values on the previous projection date. To do this, on the *Cost Projection by Date* form, the user creates a new cost projection by date for the same project with the same budget level, loads the budget lines, and clicks **Copy Projection** on the form toolbar (shown below).

The system opens the dialog box with the list of released cost projections with the same project and project budget structure (also shown in the screenshot below). Then the user clicks the line with the needed cost projection and clicks **OK**. The system copies the **Projected Cost at Completion** value to each line in which the **Anticipated Cost** value does not exceed the **Projected Cost at Completion** value being copied.

000002 - Cos	Deter I projection upo	aned							0	NOTES FAR	s overowab	dos toos-	2
* 2 2	0 +	е к	с э н	REFRESH	COPY PRO	ECTION E	MOVE HOLD	( and )					
Balaratus Mr		000002			motort	LEVEL		-					
+ Project		HOTEL The	Seath Hanal and Con	appinions P 1	P. P. Parks	n Tana		Owned Date	at Brigman.	363	THE ART ML		
Print Carses	e :	UND		Copy Proy	ected Cost	s to Complete I	Fiom		×:	22.5	17.282.78		
Propert Marrope		Elen Waters		A H					and a	(7)	148,254,29		
Date:		Con Head				-				58.5	1214.23		
+ Data		1152025	8		Address of the second	1000-100			and a	12)	102.106.48		
+ Frenchise Data		5/53125	<b>B</b>	10.00	100001	Cast pr	gedien for May 3	68		1	130.186.29		
Overlyine.		Cost projectio	n updated						14		141		
	THE REAL PROPERTY AND												
0	WEW DRANSA	0000	view comment	1					6. In 1997				
B Propert limit	Accessions	Coll Coll	Property Contro Control					CH CHH	AT Con	Constantion Recting	Perhemann (NJ	Antoquest Systematics (Fig.	
1			26.541,095.19	96.317 JIN.71	26.05	25545325.71	1,005,375,59	6.596,515,88	16256267.52	13.346.556.13	12.62	61.90	:
11	LABOR	41.311	240.000.00	240,008.08	1.10	240,000.00	8.00	0.00	8.00	241,010,01	8.08	8.09	I
81	LABOR	01-313	216.000.00	216.008.09	9.00	216.000.00	1.05	4.09	8.08	218.000.00	8.00	. 6.07	
-81	MIC	81.355	8.88	16.000.08	110.00	15.000.00	96,000.00	8.09	75.000.00	8.08	10.00	105.08	
- 01	MSC	01-505	8.08	15.002.03	101.00	15.000.00	15.000.00	0.00	15,000.00	100	100.08	100.08	
-81	MISC -	21-005	244,013.39	303,455,71	39.71	300.415.71	106.892.32	1.15	18.852.52	244,803,39	38.71	36.71	
62	LABOR	03-000	3,009.68	81,000.08	84.12	12 500.00	40,000.00	3,000.08	61,000.00	-35,508.08	354.08	409.08	
42	MATERIAL	62-000	50.000.00	100.000.00	58.00	105,000.00	50,000.00	1.01	90.000.00	50,000,00	50.00	54.08	

Figure: Creation of a cost projection copy

## **Enhanced Project Analytics**

To get more detailed information and analytics, the user clicks **View Finance Chart** on the table toolbar of the *Cost Projection by Date (PM305500)* form. The system opens the new *Project Financial Vision (PM405000)* form (shown below) with the information for the line that had been selected in the table of the *Cost Projection by Date (PM305500)* form.

Pr	oject F	inand	cial Visio	n								
0	n	VIEN	W TRANSA	CTIONS ZOON	in.	ZOOM OUT	SHOW CHART	н в				
	Project Account G	reage	HOTEL - TE	he Beach Hotel an ,A	i.e	Project Task Account Group	02 - SITEWORK LABOR - Project L	р ж.Р	Compily Pro	ect Task ount Group	Description	The Baach Hotel and Condominiums (Warner Street)
	Paint		Tear			Inventory ID		.e	Group By Inve	etary ID	Project Start	\$102025
	Start Date	81		0		Cast Code	02-000 - Silework	.0	Comp By Ces	e Code	Propert End:	
	Erel Dale		5/1/2025	0							Total Actual Amount	12,785,876.16
	Project Ma	anagar	EP0000053	3-Ellen Welson							Total Budgeted Amount	29,641,929.71
8	Period Mit.	Project	t Tank	Address of Group	Cost Cost	Tear	Date	Actual Quantity	Actor Annual	Actual PDD Quantity	Actual P10 Amount	
2	1	12		LABOR	02-0	66 2025	51/2025	206.00	48,000.00	206.00	48.000.00	

### Figure: The Project Financial Vision form

On this form, a user has the following capabilities for analysis of the project costs and revenues and investigating anomalies in actual costs (see the screenshot below):

- Changing the selection criteria to change the scope of the information being analyzed.
- Changing the period for which the data is collected by clicking **Zoom In** and **Zoom Out** on the form toolbar, or by changing the option in the **Period** box and specifying dates in the **Start Date** and **End Date** boxes. The system filters the scope of project transactions being included in the analysis based on these dates.
- Grouping information by project task, account group, inventory ID, and cost code by selecting the respective check boxes in the Selection area (see the screenshot below).

C	roject F	inan vit	cial Vision V Vision Vision V	Actions 200	MIN	COALITATION .	SHOW CHART	ня				
-	Prosect Account C Period Start Dam	icige:	HOTEL- Casil Year	The Deach Human		Prisod Task Accessed Group revisitory (C) Cont Conte		а 0 0	Onive By Pro     Onive By Act     Onive By Act     Onive By Inv     Onive By Inv     Onive By Con	ect Task over Grove erbory 10 er Gode	Description Project Start Project Exit	The Beach Hotel and Conduminations (Warner Ritreet) 3/10/025
ļ	End Date Project M	i Ineger	EP00000	CT C	-						Edul Actual Annuni Total Bridgeled Annuni	12,785,076 19 29,541,929,7
	Pariad Net	Proje	the Taul	Additional Graves	Caret Contra	Star	Date	Antoni Quantity	Annual Annual	Annual PTD Quantity	Annual PTD Annual	
1	1	-		MISC	01-505	2020	12/15/2025	0.90	73.000.00	0.00	19,000.00	
	. 1	11		MINC	01-000	2525	12:21/2025	0.00	167,556.96	0.00	167,558 (40	
	1	11		MISC	01-300	2125	12/31/2025	0.00	15,000.00	0.00	15,000.00	
	. 1	60		LABOR	02-000	2125	12:35:2025	206.00	88,000.00	206.00	48,000.00	
	1	-02		MATERIAL	02-000	2020	12/01/2025	100.00	50,000.00	100.00	50 000 00	
	1	62		SUBCON	62-200	2525	12/31/2028	0.00	350,000.00	0.00	360.000 88	
		62		SUBCON	02-310	2625	12/31/2025	0.00	226.760.00	0.00	226.700.00	
	.1	53		MATERIAL	65-000	2625	12/31/2025	603.00	41,200.00	600 (20	41,200 (0)	
	1	03		SUBCON	03-100	2025	12/35/2025	0.00	800.000.00	0.00	800.000.00	
	.1	89		SUBCON	03-304	2025	12/36/2025	0.00	1.018.000.00	0.00	1,018.000-00	

Figure: UI elements on the Project Financial Vision form

The user can also view a project dynamics chart by clicking **Show Chart** on the form toolbar (see the following screenshot).



Figure: Chart prepared for the selected cost projection

### **Release of Cost Projections by Date**

A user can release a cost projection by date on the *Cost Projection by Date (PM305500)* form regardless of its budget structure. If the cost projection structure matches the structure of the cost budget of the project, the user can also select the **Update Project Budget** check box prior to release; on release of such cost projection the system will update the **Projected Cost at Completion** values in the project cost budget for the corresponding project on the *Projects* (PM301000) form. For each projection date, only one cost projection by date can be released for each project.

The project budget can be updated on release of the cost projection if there is no released cost projection whose projection date is later than the projection date of the cost projection being released.

The user can then prepare *Project WIP* (PM651500) and *Project WIP Detail* (PM652500) reports with the **Planned Cost Estimation** parameter set to *By Cost Projection* to use the amounts from the last released cost projection for calculations.

### **Other Enhancements**

On the *Cost Projections by Date Report (PMGI3055)* inquiry form, users can review the list of released cost projections for all projects. For each project, the table shows a cost projection by date with the latest projection date until the date that is specified in the **Actual to Date** box, as shown in the following screenshot.

Cost Projectio	ns By Date Re	port										DATE OF COMPANY OF COM	· 100.0 +
0 n H													
+ Austral for Data	512125	-											
Day store laste	twis in party are the	111								1.7			
R Care	Pages	and the second	Subress No.	Preparate	Card In Langue	Proseinal Cantor Langhesia		Antonio Antonio Cast	Andread Const Tel: Date	Cantoline Oper Cont	Annound	Con Delpe Bachop	particular and partic
Dist. Vistant	1000	lusp:	And a state of the	\$4383	24364,827.45	34,337,498,84	21.45	26546,825.71	7,580,325 62	0.010.010.00	10,298,307 12	11.041.001.10	36.67

Figure: The Cost Projections by Date Report inquiry form

# Projects and Construction: Improvements to AR and AP Reports

In Acumatica ERP 2025 R1, improvements have been made to multiple AR and AP reports and inquiry forms to improve their usability for construction companies. The following sections describe the changes to the UI of the report forms used to run reports and to the generated reports.

## **Changes to the Reports on AR Documents**

The following changes have been made to the *AR Documents by Customer* (AR634000) and *AR Documents by Project* (AR634100) reports:

- The reports previously named *AR Open Documents by Customer* and *AR Open Documents by Project* have been renamed to *AR Documents by Customer* (AR634000) and *AR Documents by Project* (AR634100), respectively. These names reflect the reports' content more precisely. The following changes have been made to both report forms:
  - On the **Report Parameters** tab, the *Open and Closed Documents* option (Item 1 in the screenshots below) has been added to the **Format** box to show both open and closed documents.
  - In the Format box, the Detailed option has been renamed to Open Documents.
  - On the **Report Parameters** tab, the **Project Manager** box (Item 2) and the **Show Active Projects Only** check box (Item 3) have been added. By using these UI elements, users can review data for only active projects and for a specific project manager, which will help them focus on relevant results.

AR Documents	by Customer				
/ A RUNR	EPORT SAVE TEMPLATE		EDIT REPORT		
Tergan	Colum Others				
MEPOWI PROMIECT	NO ADDITION SORT AND FUTUR	S PRINTAND	MAN DETTAGE	REPORT VOLUME	DIMENTIFICATIONS
+ formal	Open and Closed Documents	- 0			
Departy/Direct	PRODWHOLE - Products Wheiesaw				
Linterer		P			
Figed		P			
Provid Manapar	EP0000002 - Maxwell Bakar	0			

Figure: The AR Documents by Customer report form



Figure: The AR Documents by Project report form

In both generated reports, the following changes have been made:

• Totals have been added to the following columns: Total Amount, Original Retainage, and Paid/Adjusted.

• Projects are now sorted alphabetically.

The following screenshot illustrates the *AR Documents by Customer* report run for Maxwell Baker's open and closed documents and including only active projects.

AR Document Company/Branch Show Active Project	HICOMP HICOMP	omer (Open out	and Close	4)		Propert Manager - Manuell B					Fage Date: 19 User	Lari 2025 S.ST.AM
Calebornet	De	Humer Account	Nate								a sub-	
LITMANICANCE!	100	wardinability										
Progett	Det	accipition .										
FIREDPOS	- Fia	ed Price Project	- milestore (	ty complete	d hours	19	0.00	1.2	1	-11.222	2	
Hat Mor. Doc. 1	104 G	wetterner Rof.	Doc Sale	Dee Dete	Status	Description	Total Amount	Original Retainage	PadAquated	Total Datasce	Unretwand Retainage	Not Saturce
Africanti Invine			6142518	621264	Ginet	Meetine tilling for proped -	1.500 88	6.50	1,506.00	8.00	1.14	1.00
						Propert Totale:	1,000.00	6.00	1,600.000	9.00	0.00	1.00
						Customer Totals	1,000.00	6.00	1,006.00	8.00	0.00	6.00
VERSOUTY	Ter	an Votes City										
Project	De	acciption.										
FIREDP95	fie	ed Price Project	- milestones	Accessed to	y projec	t memoger						1.1.1
flat. Mpr. Doc. 1	104 Q	artismer Hat. Symmet Hat.	Doc Date	Due Dele	Status	Description	Total Amount	Orgenal Reternage	Paul Adjusted	Total Balance	Granteased Fatainage	Net Salarce
APROVIDE Invoto			6/14/2018	17142010	Cimet	Minations tailing for project -	+.900.38	6.00	1,006.00	3.00	0.00	2.00
						Project Totala-	1,000.00	8.00	1,008.00	8.00	8.48	- 8.00
						Contorner Tutale:	1,800.88	16.00	1,006.00	8.00	0.00	6.00
						Company Totals:	2,500.00	6.00	2,508.00	8.00	9.00	8.00

#### Figure: The AR Documents by Customer report

The following screenshot illustrates the *AR Documents by Project* report run for open and closed documents and including active projects only.

AR Doc Company Data Activ	uments by Dunch PHC e Projects Cel	Project (Open an XOVHOLE V	nd Closed)							Page Date U User adre	27 of 267 NOI25 5 17 AM
Propert	Concerner of	Description	<b>GLIONEN</b>	-0000335	10 P P SM POOL BAR	2018/01/2			22.00	100000000000	100 C
10010405	invite.		1212001	12/91/2021	<b>Dured Contract Adhysion</b>	7,800.80	6.06	7,000 00	6.00	8.00	1.0
APRELISION	Invoine		11/06/29/22	13/16/06/22	<b>Doned Contract Renewal</b>	7.800.80	0.00	7,000.08	10.00	8.00	8.0
ARC12800 Wroke	Marchine.		10362825	034343	<b>Closed Contract Removal</b>	T.800.80	0.06	7,960,96	0.00	8.00	8.00
					Contorner Tutate	31,000.00	0.00	21,000.00	0.90	1.00	8.0
					Project Tutate	31,000.00	0.00	21,000.00	0.00	8.00	8.0
C7080057	16	Suffware contract	, licensed and	Two:e							
Customer		Customer Account	C Name								
MARCANO	OUT .	Marina Golf Chili									
Ref. Mite.	Oce. Type	Customer Ref. Payment Bet.	Disc Date	Due Gale	Status Description	Total Amount	Original Reference	PaidAdputed	Total Balance	Unreleased Relativator	Ret Dalance
STATISTICS.	Section 1		51010	\$512903	Closed Contract Activation	16,800.00	0.00	16,016,05	0.36	1.00	1.0
NB\$238	Involution		4/36/2825	\$36353	<b>Direct Contract Revenue</b>	2,800.80	0.00	2,800.00	0.90	1 00	1.0
MILLION OF	Invite		4/35/2524	5/36/2004	Cosel Contract Revenue	2,805.00	0.00	2,806,98	0.00	8.00	8.0
					Customer Totals	32,400.00	0.86	22,406.00	8.00	6.00	6.0
					Project Totals	32,400.00	0.36	22,400.00	5.00	6.00	1.0
C7960007	18	Software contract	t, fault								
Customer		<b>Customer</b> Account	t Name								
DORDER	soe.	Borders Books, N	Auto & Calle								
Ref. Min.	Oce, Type	Customer Ref. Phyment Ref.	Duc Dete	Des Date	Status Description	Total Amount	Original References	PaddAdjusted	Total Balance	Unreleased	Not Oalamo
10000	Nyone.		\$10902	6512522	Dosed Contrad Adhiation	7,800.80	0.00	7,005.06	6.98	6.00	8.00
10012473	brooke		1152625	7/3/1/29/21	<b>Donel Contrad Reneval</b>	7,000.00	0.36	7,010.00	0.00	0.00	8.0
ANIT COMPANY	Broke.		1010034	8363004	Closed Contrad Renewal	7,000.00	0.06	7,886.56	0.90	1.99	1.9
					Careformer Totale	31,000.00	8.88	21,006.08	6.86	1.09	6.0
					Project Tokale	31,000.00	0.88	31,000,00	0.00	8.08	8.0
C7969067	18	Software contract	L See5								
Customer		Customer Account	C Barnel								
LA.SLEWE	1983	Lawritinha									
Bet Min.	Doc. Type	Customer Ref. Payment Ref.	Doc Date	Due Date	Status Description	Total Amount	Original Butanuge	PauliAdjusted	Total Balance	Unreleased fieldshape	Ret Datamos
Sector 21	Brocks		&1282	651303	Closed: Contract Activation	7,940.00	0.04	7,310,00	8.86	1.00	1.0
ARREST	<b>BYOKE</b>		715/0823	7242653	<b>Oxied Contract Revenue</b>	7,810.00	0.06	7,810.08	0.00	8.00	10
100112-30	<b>Invitit</b>		1010034	8383034	Closed Contract Revenue	7,910.00	0.96	7,810.50	8.58	0.00	1.0
					Customer Totale	35,738.00	6.00	\$3,738.68	6.86	8.00	5.0

Figure: The AR Documents by Project report

### **Changes to the Reports on AP Documents**

The following changes have been introduced in the *AP Documents by Vendor* (AP634000) and *AP Documents by Project* (AP634100) reports and report forms:

• The reports previously named *AP Open Documents by Vendor* and *AP Open Documents by Project* have been renamed to *AP Documents by Vendor* (AP634000) and *AP Documents by Project* (AP634100), respectively. These names reflect the reports' content more precisely. The following changes have been made to both report forms:
- On the **Report Parameters** tab, the *Open and Closed Documents* option (see Item 1 in the screenshots below) has been added to the **Format** box to show both open and closed documents.
- In the Format box, the Detailed option has been renamed to Open Documents.
- On the **Report Parameters** tab, the **Project Manager** box (Item 2) and the **Show Active Projects Only** check box (Item 3) have been added. By using these UI elements, users can review data for only active projects and for a specific project manager, which will help them focus on relevant results.

AP Documents	by Vendor		100(8
/ 0. NN	EPORT SAVE TEMPLATE	IS NUMBER EDITABLISHED	
Template .			
	Tends () there?		
REPORT PHILMES	DIS ADDITIONES SOUTINED PRODES	PRINT AND ESHIN, SETTINGS	
Report Farmat	Open and Oceani Occuments	9	
Empryfried	PRODUMOLE - Products Westeralle		
Weeder		p	
Project	A CONTRACTOR OF A CONTRACTOR O	P	
Project Manager.	EPODD00004 Januagh Becker	P 🙆	
and the second for	Shaw Autore Property Unity	0	

Figure: The AP Documents by Vendor report form

AP Documents I	by Project EPORT SAVE TEMPLATE	Internet Entraneous	TOOLS 4
lengtuin	Obfet Offerer	1	
Report Former Company/Darock Hondar Propert	Open and Oscard Documents PRODUMOLE - Products Whitesule		
Project Manager	EPODD00001 - Joseph Backer Show Active Projects Drig	8	

#### Figure: The AP Documents by Project report form

In both of the generated reports, the following changes have been made:

- Totals have been added to the following columns: Total Amount, Original Retainage, and Paid/Adjusted.
- Projects are now sorted alphabetically.

The following screenshot illustrates the *AP Documents by Vendor* report run for Maxwell Baker's open and closed documents and including only active projects.

AP Doc Company Show Act	sements by Ven Scarch PRODVI in Praeds Only	dor (Open and HOLE	(Closed)		Project Mark	eger. Market Br					Page Date: 15 User	T of T KON25 & 15 AM admin. admin.
Vendor	ADDRESSOR	Wendow Acces	ord Name	Date Vend	IN THE							
Project	INTERNAL21	Generation		Internal pro	sjects 2024 - Isanik experts	-	22102-02245		600 M-000		5000000	0.02000000
Bef. No.	Dox. Type	Vendor Ref./ Payment Ref.	Disc Date	Due Date	Nature Description		Total Amount	Original Retainage	Paul Adjusted	Total Datamore	Overleased Forteinage	Net Datenic
052525	24	342942	3160621	4152021	Chuesel		364-98	1.00	308.00	1.00	8.00	8.0
						Project Solate:	2010.000	6.00	208.00	6.00	8.00	8.0
						Wendox Totala:	305.00	4.00	308.00	8.00	8.00	8.0
Vendor:	EP DOCODOC	Wendor Acco	wit Name:	Marpel B	dat							
Project.	INTERNAL21	Description	14.2.2.2.1.4	Internal pr	ipuls 2021 - Mask experis	-			a destadad		1.	- constants
Ref. Mite	Bod. Type	Vendor Het/ Payment Bet.	Doc Gette	Due Dete	Status Description		Total Amount	Original Retainage	PartAdjusted	<b>Total Balance</b>	Devisioned Relatings	Net Datano
8000	Cash Purchase	EX BROOM	6182922		Closed On site heaving	5-0-0 (O.U.)	905.34		905.54	1.00		8.0
						Project Totalac	9098-844	4.00	909.84	8.00	8.00	8.0
Project:	INTERNALIZ	Oracription:		transal pr	ands 2022 - back expans							
Ref. Min	Dos. Type	Vendor Bet/ Payment Ref.	Dos Date	Due Date	Status Description		Total Armonto	Citype all Retainage	PastAdusted	Total Balance	Districted Retainage	Nel Dalaho
012251	Cash Purchase	EXIMINES	1010102		<b>Clused Training expense</b>	en .	1.287.46		1,187.46	8.00		
						Project Tables:	1,007.40	6.00	1,287.48	8.00	8.00	8.0
Project.	INTERNAL 21	Description:		internal pr	ands 2023 - toxit expense	-						
flat Nor	floc Type	Vendor Ret/ Payment Ret	Dior: Owter	Due Dete	Status Description		Total Amount	Original	PartAdjusted	<b>Total Balance</b>	Unreleased Determine	Net Dalance
40.40	Cash Purchase	EX100115	6/2/02/	a an' a ao amin' da	<b>Closed Transing expense</b>	**	1,397.46		1287.48	8.00		1.0
102504	Cash Purchase	EX380116	910003		Closed Deliver on elle 8	aning	1.045.52	2.2	1,065,52	8.00		8.0
						Propert Tutals:	2,552.98	6.00	2,562.98	6.00	8.00	1.0
						Vendor Totale:	4,650.28	6.00	4,886.30	8.00	1.00	8.0
						<b>Company Solaik</b>	4,856.28	6.00	4,810.30	8.00	8.00	8.0

#### Figure: The AP Documents by Vendor report

The following screenshot illustrates the *AP Documents by Project* report run for open and closed documents and including active projects only.

AP Doct Company Show Add	aments by Pro Branch: PRODI or Prancts Cirily	iject (Open ar HOLE	vd Ciceed)								Page Date: 10 Use:	8 of 125 12125 4 20 AM admin admin
Property	CATRHECUS	Description		Plagler Car	alon Hone - Coston Ho							
Wendors	NESTINCE	Wendlor Acc	ount Name:	Universide D	Sinponal	2010						an sound
Hel. Min.	Dan. Type	Wendor Ref./ Payment Ref.	Dox Date	Date Date	Status Description		Total Amount	Original Retainage	Pathlipstel	Total Balance	Unretpased Fotomage	Net Balance
002401	24	832mil	11362028	10090909	Oper Oumpsters		8.600 88	436.00	8.176.00	459.00	430.00	0.04
						Wendor Totate:	8,400.06	-01.00	8,178.00	438.00	430.08	8.09
						Project Totals:	1,077,198.58	55.857 18	1,221(10)8:32	\$5,857.10	\$5,857.10	0.00
Proet	COTFINITE.	Description		The Beach	Huter and Condon - Prop	-						
Mendari	BOPHO0	Menulter Acc	muni Name	<b>BC Phillip</b>	Company							-
Hat. Mar.	Doc. Type	Woodor Ref./	Dox Date	Due Date	these Description		Tutal Amount	Orgenal	PadAquated	Total Balance	Unreviewend References	Net Materica
00401	84	59(2)	11753800	12762836	Open Lamber for inter-	tr salis	31.96.96	1168.25	25.606.75	1.00125	1,918,25	6.36
						Vendor Totale:	34,505.00	1.558.25	29.604.75	1.658.25	1,058.26	0.00
Wendur:	COMMERCONC	Wendur Acc	ount Name:	Contention	e Canorelia				100000	A STATE		
Het No.	Dani. Type	Wendlor Ref./ Payment Ref.	Dox Date	Due Date	Mattes Description		Total Amount	Cirginal Retainage	PaulAdjusted	Total Balance	Universional Fortunings	Net Salaria
102418	54	40454	\$250308	105000	Open Concrete Sub		\$ 290,000 W	264 500 00	5 825 588 68	284,589,00	28A 500 M	0.00
						Vendor Totale:	5,290,000.08	254,520.00	5,625,588.00	364,500.00	264,500.0E	0.00
Metodiat .	CRIMITCO	Vendor Acc	oont Rate:	The Crate	Company							
Hart Mile	Dec. Tape	Hendor Ref./ Payment Ref.	Doc Date	Due Deix	Status Description		Total Amount	Original Relanage	PaidAlgueted	Total Balance	Unreleased Telamage	Net Seleton
00417	54	54634	\$10,000	892030	Choosed Crane Rental	10.000	\$42,000 JH	8.00	\$42,008,00	3.00	0.00	5.00
						Vendor Totale:	942,000.08	6.00	MQ.008.05	8.00	0.00	0.00
Incide:	DBROWN .	Member Acc	ound Name:	Dag Bros	et & Brothers Inc.							
Het. NEX.	Doc. Type	Hendos Raf./ Payment Ref.	Doc Owle	Due Date	Status Ovecription		Total Amount	Original	PaidAdjusted	Total Delatros	Unreinand Relationst	Net Datance
002171	Est.	Jug2020	1160608	A-1420.00	<b>Closed Bunding means</b>	or for Aug 2020	31,847,96	6.50	31.667.00	3.00	0.16	0.00
982311	EHE .	3ep21029	8150525	81542000	<b>Closed Bonding Insuran</b>	ce Ra (hep 2020)	31.667.00	0.00	51,667.00	0.00	0.00	0.00
002172	EH6	0x00029	8150109	10152608	Clusied Bundling Immunation	sia fila Cist 2820	21,667.69	6.00	31,667.00	9.00	0.00	0.00
002373	54	No-2528	19/15/2128	11/542830	Closed Bunding insular	os for Nev 2528	34,867.86	6.00	51,667.00	0.00	0.80	
002374	54	Dec2078	1115000	12115-2929	<b>Closed Bonding Insuran</b>	car Rei Chies 2620	31.867.88	6.00	31,667.00	0.00	0.00	0.00
992313	84	Jak2021	13153139	1/14/2021	<b>Closed Bunding visuan</b>	ce foi 2an 2021	23,867,86	10 000	21,067.00	3.00	0.00	0.06
092379	210	Fes2t21	1/15/2021	2142821	<b>Clueid Binding Insuran</b>	ce for Feb 2021	21,667.00	8.00	31.867.90	3.00	9.00	0.00
002377	Dil	Mar2021	2150121	347261	<b>Cineed Bonding Internal</b>	ta to Mar 2021	31,867,89	0.00	21,067.00	9.00	9.00	0.00
002375	EH.	Apr/2021	3450924	4/142921	<b>Closed Bundling insular</b>	on the Apr 2021	31,867.00	0.00	31,667.00	0.00	0.00	0.00
992373	84	Mig201	#152521	5/15/2821	<b>Closed Bunding insuran</b>	or for May 2021	21,867.86	0.00	31,867.90	3.00	0.00	- 6.00
102201	84	Aer0021	5/15/2021	6/142(07)	<b>Closed Building Insular</b>	sie for Jun 2021	21,867.00	5.00	311.06/1.00	8.00		- 14

Figure: The AP Documents by Project report

#### **Changes to the Retainage Register Reports**

The following changes have been introduced in the *AR Retainage Register* (AR634500) and *AP Retainage Register* (AP634500) reports:

- The new **Non-Retain. Paid** column has been added to the generated reports. This column shows the amount paid for the non-retainage part of the original document.
- Projects are now sorted alphabetically.

The following screenshot illustrates the AR Retainage Register report.

AR Retain	age Regi	ster						rom Period: 11-2	813		Page	1 (13
Corgany En	added add	OWHOLE						Penol: 011	1420		owe tract	125 4 21 JM
Project		Description										
CSTROEV	_	Pain Estates	Developer Project Exam	and a second								_
Customer		Customer Acc	could Name									
CARROLY	_	Carr Develope	nent Inc.									
Ref. Wbr.	One Type	Disc Date: 58	atus Total Amount	Non-Retain. Amount	Original Retainage	Total Balance	Non-Retain. Paid	Non-Retain. Balance	Unreleased Partsinger	Unpaid Retainage	Paid Retainage	Net
AR008182	invite .	15/15/29/28 CA	used 687,032.61	887.052.61	0.00	6.00	697.032.61	0.00	8.00	0.00	0.00	0.00
PF00041	Invoice for	Pain Estates - De	sveloper Project									
ARRONATED	<b>Invoice</b>	11/15/28/28 Ca	osed 651,218.33	851,216.33	0.00	0.00	651,218.33	0.00	0.00	0.08	0.00	0.00
P#100042	invoice for	Paint Estates - De	iveloper Project									
AR208784	Bevoice	12/15/2828 CA	osed 602,675.78	882,615.74	6.80	0.00	682,615.74	0.00	0.08	0.00	0.00	0.00
PF00043	invoice for	Pake Estates - De	rveloper Project		1922	1222		2.53		12.51	12.22	- 355
0112121212	Bevoace .	FARGET C	osed 790,192,24	760,182.24	0.10	0.00	790,192.24	0.00	0.00	0.00	0.00	0.00
PF DOD44	envolue for	Part Estates - De	Evenoper Project	man and see			which there was				14.44	
AT 201.00	Service Fre	Date Exterior Co	0980 788,225.58	199,295.58	0.10	0.00	788,295,38	0.00	4.98	0.00	9.96	0.00
PT 00045	Invoice for	And Excellent - De	HEIGDER PTORCT									
		watomer Total:	3,660,262.51	3,560,262.51	8.00	0.00	3,969,362.51	1.00	9.00	0.00	9.00	0.00
		roject Balance:	3,660,362.51	3,560,262.51	6.90	0.00	3,980,362.51	6.00	0.00	0.08	0.00	0.00
CEMBRON	8	Flagler Custor	n Home - Custom Home I	Project Example								
Contornet		Customer Acc	curd Name									
FLAGLER		Flagler Family	Trust									
Ref. Wbr.	Doc Type	Doc Date 58	atus Total Amount	Non-Retain. Amount	Original Retainage	Total Balance	Non-Retain. Paid	Non-Retain. Balance	Unreleased Retainage	Unpaid Retainage	Paid	Net
ARDORTAT	Invoice	11/15/29/20 Or	pen 412,412.95	371.171.65	4124130	41,241.30	371.171.65	4.00	41,241,30	41,241,38	0.00	0.00
PF00021	impoice for	Flagler Custon H	ome - Cueton Home									
ARIDORTAS	Involot	1/15/2021 0	pen 400,606,95	432,638,25	45,068,70	45,068.70	432.818.25	0.00	48,068.70	48,068,70	0.00	0.00
P#1001022	Invoice for	Flagler Custors H	one - Custom Home	1. 2. 1.				223			2012	1.11
APR0657.40	Bitry George	3/15/28/21 (3	en 471,577,85	424,420.08	47,957,79	47,157.79	424.420.06	0.00	47, 197, 79	47.197.79	0.00	0.08
PF 00023	Involce for	Faigler Californ In	ome - Custom Home									
	9	wellower Tutal:	1,364,677.75	1,228,209.96	156,467,79	136,467.79	1,328,309.96	6.00	136,467.78	136,467,79	0.00	9.00
		ropect Balance:	1,364,677.75	1,220,209.96	136,467,79	136,467.79	1,328,309.96	9.00	136,467,79	136,467,79	0.06	0.00
CSTRHOTES	-	The Beach Ho	tel and Condise - Progres	a Billing Example								
Customer		Customer Acc	count Name									
EQUGEP		The Equity Go	oup investors									

# Figure: The AR Retainage Register report

The following screenshot illustrates the AP Retainage Register report.

AP Retain Company/th User:	admin ad	ster x014HOLE						Fm 30	en Period: 01.2 Period: 01.2	913 825		Page Date 19/2	1 of 10 125 4 35 AM
Project		Description	1										
CSTRDEV	-	Palm Exten	es - Develope	e Project Exam	ple								5
Vendor		Wendor Acc	count Name										
<b>BCENCO</b>		<b>BC Philips</b>	Company										
Ref. Mbr.	Dos Type	Doc Date	Status	Total	Non-Relain. Amount	Original	Non-Relain. Balance	Nos-Retain. Paid	Urgeid Reteinage	Peid Reteinage	AP Sill Delence	Retainage Dalance	Net
952459 76598	Bill Frammp	12/28/2020	Open	271,256.00	287,693,28	13.562.60	0.00	257.685.29	13,562.86	0.00	13,562.60	15.542.68	0.00
	W	undior Total:		271,256.00	257,695.20	13,562.86	6.00	257,695.20	13,562,80	0.00	13,562.00	13,562.00	0.00
Vendor		Vendor Acc	count Name										
BOWMAND	VR	Bowman S	unveying										
Ref. Nor.	Doe Type	Doc Date	Status	Total	Mon-Retain. Amount	Original Retainage	Non-Retain. Belance	Non-Hetain. Paid	Unpaid Retainage	Paid	AP Bill Datance	Retainage Dalartor	Net
102945 5463456	Bill Sunity	19/29/2020	Open	3,206.80	3,040.08	160.00	6.80	5,040.00	160.08	0.08	160.00	160.08	0.00
	v	endor Total:		3,200.00	3,040.00	196.00	6.00	3,040.00	100.00	0.00	198.00	160.00	0.00
Vendor		Vendor Acc	count Name										
CENTERO	88	CB Silewie	8,8ic.										
Ref. Mbr.	Doc Type	Doc Date	Status	Total	Non-Retain Amount	Original Retainage	Non-Relain. Balance	Non-Hetain. Paid	Unpaid Retainage	Paid Retainage	AP Bill Delence	Retainage Balance	Net
5340345	Bill Silevenk	9/15/2020	Open	43,306.80	60,040,00	2,196.00	\$ 90	60,040,08	3,160.00	0.06	3,160,00	3, 160.08	0.00
	v	endor Total:	10.00	63,200.00	90,040.08	3,160.00	5.00	60,040.00	3,160.08	9.00	3,160.00	3,160.08	9.09
Vendor	-	Vendor Acc	ount Name				5.6.1.6						
CLEANING		Cleaning 5	envices Grou	•									
Ref. Mbr.	Doc Type	Doc Date	Status	Total	Non-Retain. Amount	Original Retainage	Non-Retain. Belance	Non-Retain. Paid	Unpaid Retainage	Paid Retainage	AP ISH Delence	Relamage Delance	Net
4563	84 Clean up	16/3/2626	Open	8,400.50	6,080.08	326.00	8.96	6,080.00	329.06	0.06	309.06	329.06	0.00
	v	endor flotal:	Sectors.	6.400.00	6,080.00	320.00	0.00	6,080.08	529.00	0.00	320.00	320.00	0.08
Vendor		Wendor Acc	cont Name	12203526	\$2.096.6	2800F		2.0.2553	10.0373	1. 2020	3-533333	0.000465	- 2002
DETALCA	e.	Detail Carp	entry										

Figure: The AP Retainage Register report

# Change to the Customer Details Form

On the *Customer Details* (AR402000) inquiry form, the **Project** column has been added, as shown in the following screenshot.

Customer Details											CUSTOM2x0:0N	100.8 *
0 0 0 0	H 8 7											
CompanyDawah • Conterner Paring Constant Alt Account Alt Schaussert	PRODUNCLE - Pro ACTIVESTAF Add	deris (Modenado e Daelling Sarvice 2 2 2 2 2	Cillion Cinclet Correct Property Referent Reserved	All Disconnell In Unreleased In Orsonnell Interne Interne Discogramp Discogramp	e Decembro	7.058.08 7.058.08 8.06 8.08 8.08	C maain (	NM Accusto				
B B D tenne		-	Press	ten.	"helister Mil	"feat Parent	-them	Con Lines	theres	Carrieros	Tartenip Grips. Amount	Canancy Research
	Active Dating Service Active Dating Service	PRODUHOLE	x c100800812	insis insis	ARECOME AVECOME	06-2826 09-2824	\$10,0025 \$101,0024	6050005 9060004	Open Open	050 V50	90.08 7,000.08	68.08 7,005.08

Figure: The Customer Details form

# Changes to the Invoices and Memos List of Records

On the Invoices and Memos (AR3010PL) list of records, the **Project** column has been added, as shown in the following screenshot.

Invoio	es and Me	PTION .							0.	utonistius - Toola -
•	n + .	и. н. ж.								
Type A	1 + . Date	Al + Des Al +							V 10	
= + D	7gm	Reference Mit.	Note:	104	No.	Colore .	Colores Marrie	Presel	Deve Lighten	Tantana (interdite)
1.8.0	desite.	AUX CONT	Cont	810004	18-2124	PDIADR	Aprilia Food	X	Faul Order	FDIAGRO31344-001
.0	make .	68312008	Open	8212023	10.2024	MUSICAREA	NUSIC AREA	CTADDODFIET	Cantal Releval C1000014.	
6.0	wanter .	omething .	Open	8012014	18.3124	INTROOD	Westwood Mana	C78000117	Cantast Revenue CT1800871	
0.0	Breks.	HIRIJINA	Open	8010524	88-2024	READINGON	New York International Searchy School U.E.	0788989675	Cartrad Revend C19800067	
4 D	beats	6/8012862	Open	8010004	88-3024	ACTIVEETIN	Active Staffing Service	C10000472	Carman Retrand C1000067	
+ 0	tests .	ARCIDINE.	Open	0010034	88-2004	FDHCHE	Auna-Faul Distribution	4050FTEAKS	Campar Research \$50775A	
9 D	been .	AVE 1.200	Opent	8010204	10.2524	REALISTAN	Real Extent lendloke	365OF TRAVE	Contract Network 2800/75A	
8.0	interes .	ARE LONG	Open	8010024	88-2024	CRABTREE	Cablese Kille House Int-	\$750F15A5	Cantuct Ranewal 6150775A.	
8.0	insis .	ARCCIDE	Closed	8112024	10,2224	VINCOUVER	Vancouver Supplee	800080000iK	Cantact Actuation 80000000	
8.0	ineres .	ARCORE	Oned	810324	08,2024	BARROOM.	Baine Development	-	Central Advalue \$1000000	
9.0	menter .	4/013054	Oreset	01002004	17-2124	ABCS7UDIO5	ADC Studies Inc	K	Electronics - Unity Shipped On.	A8C57L0X052504#428
* 0	beats.	881000	Classif	1010001	85-2624	ELEVATION	Elevation Computers	×	Prohestand services work	ELEVAN0821344-012

Figure: The Invoices and Memos list of records

# Projects and Construction: Improvements in Tracking Project Inventory

Acumatica ERP tracks the project-specific inventory information for each project that has the *Track by Project Quantity* or *Track by Project Quantity and Cost* inventory tracking method selected on the **Summary** tab of the *Projects* (PM301000) form. This tracking is available if the *Project-Specific Inventory* feature is enabled on the *Enable/ Disable Features* (CS100000) form.

## **Side Panels for Tracking Project Inventory**

In Acumatica ERP 2025 R1, the following side panel tabs has been added on the *Projects* form:

• **Current Project Inventory**: This tab of the side panel (shown below) displays the project inventory information for the project that is currently selected on the *Projects* form.

HOTELRT - The Be	ach Hotel and Condominiums (Tyle + ≘ K < > ≫	Avenue) COMPLETE	-	Project inventory 0 0 H	8	i.				C ×
+ Project (D)	HOTELET	Cattorne	Arriant .		0	Sheet Links with	Zare On Ha	and Quantity		
Template Datus	l hiter	Project Vers	W	B Restored II	Louitor 6	Propert D	test ID	terestory til	Silly On Hand-on Bee	Cent Center 10
Description	The Beach Hotel and Condoniniums (Tyler Ave	nuej	-	> TOCONSTR	841	HOTELRT	-00	CARPETNE	120.04	HOTELETER
BLAMMARY TASKS	REVENUE BUDGET CONTINUEDET	BALANCES	ш	TOCOMOTE TOCOMOTE	801	HOTELAT	09	CAUSTIN	150.00	HOTELETING
The set of			page 1	TOCOMETR	ROT	HOTELST	04	DEANTER	250.00	HOTELRIGE
Reason Refer Land	Tank and Cost Costs			TOCOMOTE	801	HOTELAT	04	PMEST	1,299.00	HOTELSTON
Cost Budget Level	Task and Cost Code		Dessaring Logic	TOCOMSTR.	801	HOTELHT	06	FLYNDOD	165.00	HOTELRING
+ Diart Date	310826 🖂		=1	TOCOMSTR	801	HOTELRE	04	STONECH	580.08	HOTELRITISA
End Date	12		Property and and							
Project Group:		21	08							
Time Activity Appresse Last Revenue Change A	EP0000033 - Ellen Watson	2	Parada for							
Inventory Tracking	Track by Project Quantity	1.								
	Allow Sector Free Disch									
	Change Online Workflow									
	CAlms Adding New Yorks on the Pip Redshift Employment		>	1.7 of Traccola				_		1.11

Figure: The Current Project Inventory tab of the side panel

• **All Project Inventory**: This tab of the side panel (shown below) displays the project inventory information for all projects that are configured for project-specific inventory tracking.

HOTELRT - The Be	ach Hotel and C + ≘ K	ondominiur < >	ns (Tyle	e Avenue) complete	*	Angeot insention A A H	8 V				0 ×
Project ID     Template     Defun	HOTELRT Active		P /	Cuttomer Project Mana	1	B. Warehouse D	Location ID	Deel with Zara D Project D	Tesk ID	boantary (D	Gily Ge Hand In Be
Description	The Brack Hotel and	Coldoniniums	(Tyle: Au	etee)		> 10CONSTR	801	HORDARD	09	CARPETIN	125.05
SUMMARY TICKS	REVENUE BUDG	er cort	5,000 <sup>+</sup>	BALANCES	EII at Page 1	19CONSTR 19CONSTR	R01 R01	HOTELCE ITALIANS	05 05	CARPETIN, CARPETIN,	12.00
PROJECT PROPERTY I	9					10CONSTR	RD1	HOTEL	09	CARPETHE	158.00
Revenue Butter Level	Tank and C	ant Code				20CONSTR	ROT	ITALMAN	09	CAMPETINE	18.00
Cost Bulget Lavel	Task and C	and Cade			Desire of the	TOCONSTR	805	HOTELSM	19	CAUPETIN	158.00
+ Bart Deter	3/1/2025					INCONSTR	RD1	HODELB	09	CARPETIN	158.00
End Date		-			Passel linest	TOCONSTR	R01	HORELRE	09	CARPETEL	108.00
Provid Group				21		16CONSTR	Rith	HOTELOP	69	CARPETEL	155.00
Term Autority Approver	EP000000	03 - Ellen Mate			Annual Apr	10CONSTR	R01	(TRUMN2	. 29	CARPETEL	18.00
Last Revenue Duriga F	far Charles and Ch					1000MSTR	R01	HOTEL	19	CARFETPL	198.00
Investory Tracking	Track by Pr	reject Quantity				20000878	RDS	DNAM	89	CARPETEL	12.00
	Cititar Inc.	in from Free 28	N/K			1000hista	805	HOTELSM	19	CAULTE	145.00
	Charge C Alter Ad Destrict	State (TankBau Sing Nave Hamp Ingelopase	en tra Fiy		\$	• • • • • • • • • • • • • • • • • • •			-	1 of 4 pages	, > н

#### Figure: The All Project Inventory tab of the side panel

Both tabs are available if the *Project-Specific Inventory* feature is enabled on the *Enable/Disable Features* form. By using these tabs, users can easily get information about the inventory items that are available for a particular project or reserved for all projects so they can plan the usage of materials for projects and the needed project purchases.

By default, the tables on both tabs show only lines with nonzero quantities. To also see the inventory that has already been consumed for the project, a user selects the **Show Lines with Zero On Hand Quantity** check box in the Selection area of the tab. The system will show lines with zero quantities in the table on a tab as well.

#### Transfer of the Project Stock to Free Stock

When a project is finished, some project inventory may still be left unused in the project-specific cost layer. In Acumatica ERP 2025 R1, users now have the ability to quickly transfer all the leftover material back to the free stock.

On the *Projects* (PM301000) form, the **Transfer Inventory to Free Stock** command has been added to the More menu. The command is available for the projects that have the *Track by Project Quantity* or *Track by Project Quantity* and *Cost* inventory tracking mode.

When a user clicks the command, the system opens the new *Transfer Project Inventory to Free Stock (PM508000)* mass-processing form, shown in the screenshot below. On this form, the user selects the unlabeled check boxes in the lines with the project-related stock items that have a nonzero quantity on hand. The user then clicks **Process** to run mass-processing. The system creates and releases inventory transfer transactions on the *Transfers* (IN304000) form that will move the stock from the project cost layer to the normal cost layer of the same warehouse and warehouse location.

T	irar	nsfer Project Ir	nventory to Free s PROCESS AL	əStock ∟ ৩ ∽  H	<b>x</b> 7			
	Pn	oject.	HOTELRT - The E	leach Hotel an				
	Pa	ojoct Task:		,p				
	im	rentory ID:		p				
10	0	Inventory ID	Warehouse	Location	Cost Layer Type	Project	Project Task	Total Qty. On Hand
	Ø	GRANITEB	TGCONSTR	R01	Normal	HOTELRT	04	250.00
		PAVEST	TGCONSTR	R01	Normal	HOTELRT	0.4	1,290.00
		STONECH	TGCONSTR	R01	Normal	HOTELRI	04	580.00
		DRYWALL	TGCONSTR	R01	Normal	HOTELRT	06	1,000.00
>		PLYWOOD	TGCONSTR	R01	Normal	HOTELRT	06	165.00
		CARPETNL	TGCONSTR	R01	Normal	HOTELRT	09	120.00
		CARPETPL	TGCONSTR	R01	Normal	HOTELRT	09	150.00

Figure: The new mass-processing form

# Projects and Construction: Improvements to the Creation of Final Lien Waivers

A final lien waiver is a legal document used in the construction industry when the entire construction job or delivery is finished and final payment has been made. Once an accountant considers the received payment to be final for the scope of the lien waiver, the corresponding lien waiver should be marked as the final one.

In Acumatica ERP Construction Edition 2025 R1, the lien waiver functionality has been extended. Now users can mass-mark lien waivers as final; this capability is available on two forms so that each user can decide which way they find more convenient.

# Changes to the Compliance Management Form

A user responsible for lien waiver processing can now finalize lien waivers directly on the *Compliance Management* (CL401000) form. For this purpose, the **Set as Final** button has been added on the form toolbar (see the following screenshot).

(	Cor	mpl	ian	ce M	anag	emer	nt									
	Ċ	ě	3	0	+	×	SET AS FI	NAL I	-	x	Y					
	A	LLR	ECO	RDS	CE	RTIFIC	ATES INSI	URANCE	POL	ICIES	NOT	ICES I	LIEN WAIVER	s o	THER DOCU	MENTS
-	0	۵	٥	*Doc	ument T	ype	Creation Date	Docum	vient i	Category		Status	Re	quired	Received from Vendor	Vendor Received Date
	0	D		Lien	Waiver		2/15/2025	Condi	tiona	I Partial				Ø	Ø	2/15/2025
>	0	D		Lien	Walver		2/16/2025	Condi	tiona	I Final					2	2/16/2025

#### Figure: The Set as Final button

i

To mark a particular lien waiver or multiple line waivers as the final ones, the user selects the unlabeled check box in the needed rows and clicks this button. The system verifies that the selected lien waivers can be marked as final; that is, it ensures that no other final lien waiver exists for the group of lien waivers.

The system groups the payment amounts to each conditional or unconditional lien waiver and generates lien waivers based on the option selected in the **Calculate Amount By** boxes on the **Lien Waiver Settings** tab of the *Compliance Preferences* (CL301000) form. For more information, see *Lien Waivers: General Information*.

Then the system changes the lien waiver type in the **Document Category** column as follows:

- Conditional Partial to Conditional Final
- Unconditional Partial to Unconditional Final

#### Mass-Processing of Final Lien Waivers

On the *Print/Email Lien Waivers* (CL502000) form, the *Set as Final* option has been added to the **Action** box, as shown in the screenshot below. Now a user can mass-mark lien waivers as the final ones. On the form, the user selects the *Set as Final* action and selects the unlabeled check boxes in the rows of the lien waivers to be marked as final. Then the user clicks **Process** on the form toolbar.

Pi	nin >	e/E	mai	l Lien	Waive PROCE	rs ssall ⊙ +								
1	Ac	Sign		1	et as Final		-	Start Date:	1/1/2525	0				
	Project D			Evid Date	2/28/2025	0								
	Venter D			Shew Proces	teed .									
	C,	ti qu	9	5	onditional	Patial	-							
c	×.	Ŀ	1	8										
		D	-	Creato Deta	n Di	cument Calegory	Marian	Required	Received Boos Vendor	Received from Joest Pages	Processed	Voded	Created Automatically	Project
	6			2/15/2	125 C	onditional Partial		S	8	10	11	- 13	81	HOTEL
5	6	D	B	2/16/2	125 C	onditional Partial		2	2				8	HOTEL

Figure: Mass-marking of the final lien waivers

Also, on the *Print/Email Lien Waivers* form, the **Subcontract Total**, **PO Total**, and **PO Number** columns have been added. Users can configure filters based on these columns to quickly select lien waivers that are ready to be set as the final ones.

# Projects and Construction: Improvements to the Construction Bonding Report

In the construction industry, management uses construction bonding reports to determine the financial health of projects. Acumatica ERP Construction Edition includes the *Construction Bonding Report* (PM650500) report, which is specifically designed to give a wide-angle snapshot of all the projects in the system and helps users to analyze how much has actually been billed for the project compared to the percentage of the project completion.

In Acumatica ERP 2025 R1, the construction bonding report has been revised and enhanced, as described in the sections below.

## **Changes to Report Parameters**

On the *Construction Bonding Report* (PM650500) report form, the report parameters (see the screenshot below) have been changed as follows:

- The Use Cost Projection check box has been removed.
- The **Planned Cost Estimation** box has been added. This parameter specifies the source of the costs that the system will use to calculate the report values. The following options are available:
  - *By Cost Budget* (default): The system will use the revised budgeted amounts of the cost budget lines for calculations.
  - *By Cost Projection*: The system will use the amounts from the last released cost projection for calculations.

Construction Bond	ing Report			
RUN REP	ORT SAVE TEMPLATE	REMOVE	TEMPLATE SCHEDULE TEM	EDIT REPORT
Template				
C	Default Shared			
REPORT PARAMETERS	ADDITIONAL SORT AND F	FILTERS	PRINT AND EMAIL SETTINGS	REPORT VERSIONS
Company/Branch:	TOADGREEN - ToadGreen Bu	ilding v		
As of Period:	05-2025	Q		
Status	Active			
Exclude Projects Comp	6			
Project.		Q	2	
Planned Cost Estimation	By Cost Budget	~		
	By Cost Budget By Cost Projection			

Figure: The new report parameter

#### **Changes to the Report Layout**

The following columns have been renamed in the printed report:

- Revenue Recognized to Earned Revenue
- Billed to Date to Billings to Period
- Cost to Date to Costs to Period

The following screenshot shows the layout of the prepared report.

CONST	RUCTION BONDIN	G REPOR	т						100.24					2 :	e	
innersitient Biter Biters binner	touries tear mart	tanan handa k	ingener Trong Tax	-	-			Toada	reen						teni, ilan	
mint	mentus .	March Longer,	-			-	Amer.		122		Incidentes.		-	-		and instants
1078	The Real Property of Concession, Name		10100	-	manufer at	10	1.8%	10000-014	100100-00100	11140		10000-000-0		1.000000000	1.00	
ACRUE 1	The Real lines of Contempose		a horast an	4.81			+#*5	100.004	10 To	a management	10.000 (0-17)	and on a	100	101001	146	
actual -	Index 128 et ladouest		in the set of	4.8%	1.000	14	10.0	1.000	10.10,07.00	in terms for	10.010.00	1004-011	140	1410416	1.00	1.4
103-0	The Part New residences (res)		of the second		0.70000.00		101	10,000,000	411,414	141410	10000	10100-000	1.4	1.0000	100	1.4
1253	The Real and Line sectors of the sector of t	1111	10,000 10,000 10,000 10,000 10,000 20,000	411 411 111 111	1000	11111	10% 10% 10%	100.000 100.000 00.000 70 00.000	10.000 10.000 10.000 10.000 10.000 00.000	11111	100021.0 100010 100010 100000	100-100 h -100-10-0 -10-70-0 -10-70-0 -10-70-0	1111	10000	11122	1111

Figure: The updated report layout

# **Changes to Report Calculations**

The following table summarizes the changes that have been made to the calculation of some values in the report.

Column	Formula	Comments
Contract Amount	The system now uses the following formula: Contract Amount = SUM of Original Budgeted Amount values + SUM of CO Revenue Budget Change Total values, where SUM is the sum of the respective amounts in the revenue budget.	The values in the <b>Contract Amount</b> column now include the amounts of the change orders that have been released prior to and within the period specified in the <b>As of Pe-</b> <b>riod</b> report parameter.
Cost to Complete	The system calculates the value by using the following formula: Cost to Complete = Cost at Completion - Costs to Period.	
Projected Cost to Complete	<ul> <li>The system calculates the value by using the following formulas:</li> <li>If there is no released cost projection for the period: Projected Cost to Complete = Cost to Complete</li> <li>If there is a released cost projection for the period: Projected Cost to Complete = SUM of Projected Cost to Complete, where SUM is the sum of the respective amounts in the cost budget</li> </ul>	

Column	Formula	Comments
Cost at Completion	The system calculates the value by using the following formula: Cost at Completion = SUM of Original Budgeted Amount values + SUM of CO Cost Budget Change Total val- ues, where SUM is the sum of the respective amounts in the cost budget.	
Projected Cost at Completion	<ul> <li>The system calculates the value by using the following formulas:</li> <li>If there is no released cost projection for the period: Projected Cost at Completion = Cost at Completion</li> <li>If there is a released cost projection for the period: Projected Cost at Completion = SUM of Projected Cost at Completion, where SUM is the sum of the respective amounts in the cost budget</li> </ul>	
Complete %	<ul> <li>The system calculates the value by using the following formulas:</li> <li>If the report is prepared with By Cost Budget selected in the Planned Cost Estimation box: Complete % = Cost to Period / Cost at Completion * 100%</li> <li>If the report is prepared with By Cost Projection selected in the Planned Cost Estimation box: Complete % = Cost to Period / Projected in the Planned Cost Estimation box: Complete % = Cost to Period / Projected Cost at Completion * 100%</li> </ul>	In both cases, if the calculated value exceeds 100%, <b>% Complete</b> is set to <i>100</i> .
Period Billings	The system calculates the value by using the following formulas: Period Billings = SUM (Amount), where Amount is the amount of a project transaction of this project with the AR type on the Project Transactions (PM304000) form.	The project transactions that orig- inate from AR invoices and deb- it memos increase the calculated amount; the project transactions that originate from AR credit mem- os decrease the calculated amount.

Column	Formula	Comments
Billings to Period	The system calculates the value by using the following formulas: Period Billings = SUM of Amount values. In this formula, SUM of Amount values is the sum of the relevant project transactions with the AR type on the Project Transactions (PM304000) form.	The project transactions that orig- inate from AR invoices and deb- it memos increase the calculated amount; the project transactions that originate from AR credit mem- os decrease the calculated amount.

# Projects and Construction: Improvements to the Subcontract Audit Report

In the construction industry, management uses subcontract audit reports to ensure accuracy in subcontract billing and verify that the performed work aligns with contract terms. These reports help managers to identify potential risks, track costs, and maintain accountability throughout the construction project lifecycle. For this purpose, Acumatica ERP Construction Edition includes the *Subcontract Audit* (SC644000) report. The printed report lists subcontract balances and related documents that have affected these balances (change orders, bills, and payments).

In Acumatica ERP 2025 R1, the layout of the report has been revised, and the report has been enhanced with new parameters, as described in the sections below.

## **Changes to Report Parameters**

On the *Subcontract Audit* (SC644000) report form, the following report parameters (see the screenshot below) have been added:

- The **Project Status** box: This parameter filters the projects whose subcontracts will be listed in the report by the statuses of the projects. The default value is *All*, which means that projects with all statuses are included. A user can select any other parameter option (*Active*, *Completed*, *Canceled*, or *Suspended*) to include only the projects with the selected status.
- The **Subcontract Status** box: This parameter filters the subcontracts that will be included in the report. The default value is *All*, which means that subcontracts with all statuses are included. A user can select any other parameter option (*Open, Closed, Open and Closed*, or *Pending Approval*) to include only the subcontracts with the selected status in the report.
- The **Report Date** box: By default, this box is empty, which means that the report is prepared for the current business date. The user can select a date to prepare the report for this date.
- The **Include Pending CO in Revised Subcontract Amounts** check box: The user can select whether to include the change orders that have the *Open, On Hold*, and *Pending Approval* statuses in the revised subcontract amounts (if the check box is selected) or exclude them (if the check box is cleared).

Subcontract Aud	T PORT SAVE TEMPL	ATE REMOVE	TEMPLATE
Template		× ~	
REPORT PARAMETER	ADDITIONAL SOR	T AND FILTERS	PRINT AND EMAIL SETTING
* Report Format:	Summary	~	
Vendor			
Subcontract Nbr		م م	
Report Date:	8		
Project Status:	<all></all>	~	
Subcontract Status:	Open	÷	
	Include Pending CO	in Revised Subcontr	ract Amounts

Figure: The new report parameters

#### **Changes to the Report Layout**

The following changes have been made in the printed report (shown in the following screenshot):

- The report header has been reworked to provide detailed information about the report parameters that have been used for preparing the report.
- The **Invoices** table has been renamed to **Bills**. In this table, two new columns, **Original Retainage** and **Released Retainage**, have been added. The **Unreleased Retainage** column has been removed from the table.
- The **Payments** table has been renamed to **Applied Payments**. In this table, the **Original Invoice** column has been added to simplify reconciliation.
- The **Unapplied Payments** table has been added to the report. A user can review this table to make sure that all unapplied payments for subcontracts have been recorded.

	ict Audit Su	mmary							H.,		0
Project			Project St.	ates	<,A2>	Company	Campany			load	Green
Vendor.			Subcontra	et Status	1,421	Date:	1/8/2025 1.19 PM	4			
Subcontract h	NDF		Include Pr	inding CO	Yes.	User	Ellen Watson				
Report Date:	3/15/2025										
Subcontract	Data	Status	Project		W	ender		Amount	Retainage		
AC 609005	3/11/2025	Clused	HOTEL - TH Condominik	e Beach Ho ms. (Mamer	(shand H Street) D	OMEDEP - Belli apol	e-ue Hume	2.090.000.00	0.00		
Sills.											
The second											
" The total rele	I retainage amo naved retainage	of the bill is di	et regardless of th stributed between	te report dat the bill line	e proportionally to the re	tainage amount	of these lines and	does not depend o	on the report dat		
" The total rele	Vendor Ref.	of the bill is di Doc. Type	et regardless of th ciributed between Date	te report dat the bill line Status	n proportionally to the re Description	tainaga amount	of these lines and	does not depend i Amount	o the report dat Original Rotainage	e Released Rytainage	Net Billed 3
The release "The total rele Ref. Nbr.	Vendor Ref.	of the bill is di Doc. Type 58	et regardiess al t stributed between Date 3/11/2525	the report dat the bill line Status Closed	e proportionally to the re Description Electricity works and	tainage amount I elevations	of these lines and	does not depend o Amount 2.090.000.00	on the report dat Ovtginal Rotainage 0.20	Released Retainage 0.00	Net Billed 1 Date 2,090,000 D
The total release Ref. Nbc.	Vendor Ref.	ont is calculate of the bill is di Doc. Type 58	et regardiess al t skilbuted between Date 3/11/2525	te report dat the bill line Status Closed	e proportionally to the re Description Electricity works and	teinage amount elevations Tota	of these lines and	does not depend o Amount 2.090.000.00 2.090.000.00	on the report dat Cetiginal Rotainage 0.20 0.20	Released Retainage 0.00 0.00	Net Billed 1 Date 2,090.000 0 2,090.000 0
The total rele	Vendor Ref.	ont is calculate of the bill is di Doc. Type Sill	et regardiess af 8 chibuted between Date 3/11/2825	te report dan dhe bill line Status Closed	e s proportionally to the re Description Electricity works and	tainaga amount I elevators Tota Uvibilit	of these lines and al Billed to Date ed Subcontract	does not depend o Amount 2.090.000.00 2.090.000.00 0.00	on the report data Ortginal Rotainage 0.00 0.00	Retainage Retainage 0.00 0.00	Net Dilled 1 Dan 2,090,000 D 2,090,000 D
The total rele	Vendor Ref.	ont is calculate of the bill is di Doc. Type Sill entract 2/	et regerdiese of t chibated between Date 3/11/29/25	te report dar the bill line Status Closed	e proportionally to the re Description Electricity works and Billed to 0	tainaga amount alavators Tota Unbilb ata 2.090 (	of these lines and al Billed to Date ad Subcontract 100:00	does not depend o Amount 2.090.000.00 2.090.000.00 0.00 0.00 Net	on the report dat Ortginal Retainage 0.00 0.00 Billed to Date	e. Ratanage 0.00 0.00 2.090.000	Net Billed 1 Dan 2.090.000 D 2.090.000 D
The total reli	Vendor Ref.	of the bill in di Doc. Type 58 oftract 2/ anges	Date Date 311/2525	he report dar the bill line Status Closed	e proportionally to the re Description Electricity works and Billed to D Unbilled Subcours	tainage amount elevetors Tota Unbells ate 2.090 5 erT	of these lines and al Billed to Date ed Sebcontesct 000 00 0 00	does not depend o Amount 2.090.000.00 2.090.000.00 0.00 Net	o the report dat Ortiginal Retainage 0.00 0.00 0.00 Billed to Date Paid to Date	Rationand Retainings 0.00 0.00 2.090,000 0 0	Net Billed 1 Dat 2,090,000 0 2,090,000 0 2,090,000 0 2,090,000 0 20 20
The relation	Vendor Ref. Ulgeted Subco Approved Ch	ont is calculate of the bill is di Doc. Type Etil entract 2.0 anges entract 2.0	E regerdiess af 9 christed between Date 311/2925 296.000.00 8.00 296.000.00	he report dar the bill line Status Closed	e proportionally to the re Description Electricity works and Billed to O Undelled Subcosts Unreleased Retains	tainage amount elevators Toss Unbills ate 2,090.0 ect tige	of these lines and af Billed to Date ed Sobcontract 000.00 0.00 0.00	does not depend o Annowet 2 096 000 00 3 096 000 00 0 20 Net Outstan	Difference of the report data Retainage 0.00 0.00 Billed to Date Paid to Date reding Datesce	Retisered Retainage 0.00 0.00 2.090.000 0 2.090.000	Net Billed 1 Dan 2 096 000 0 2 090 000 0 00 00 00

Figure: The updated layout of the report

# Projects and Construction: Project Quotes in the Mobile App

A project quote in Acumatica ERP is a document that is used to estimate the revenue and costs of a potential project; it can also be used to create this project if the customer agrees to the terms of the quote. Previously, the project quote functionality was not supported in the Acumatica mobile app connected to an instance of prior versions of Acumatica ERP. In the mobile app, the users were not able to create project quotes or review the complete details of existing project quotes that were submitted for approval.

Starting in Acumatica ERP 2025 R1, the Acumatica mobile app includes the *Project Quotes* screen, which fully supports all the capabilities of the *Project Quotes* (PM304500) form in the web version.

## **New Project Quotes Screen**

A user can now perform the following operations with project quotes and related documents in mobile app:

- Create a project quote from scratch
- Create a project quote based on an opportunity
- Select a project template in a project quote
- Edit project quotes
- Convert project quotes to projects
- Approve project quotes on the *Approvals* screen (if the *Approval Workflow* feature is in use and an approval map is configured for project quotes)

The following screenshot shows a project quote that has been created in the Acumatica mobile app based on an opportunity and is ready to be converted to a project.

× Proj	ject Quote	6	20 :
Quote Nbr.: F Status: Appr	20000001 Tota roved Tota	il Sales: 3,3 il Cost: 2,0	00.00 00.00
Edit	Conv	ert to Pro	oject
Summary	Estimation	Tasks	Activities
Dann * Oct 16, 20	24	нананан Ба //	
Description A juicer for	r HM's Bakery	& Cafe	
Business Acc HM's Bake	ount ry & Cafe		
Edemat Sel			
Optionisety II 000001		through the	-0
Project Mana			
Printi Tema	late		
111	0		5

#### Figure: Project quote in the mobile app

For more information about the project quote workflow, see the *Processing Project Quotes* chapter.

## **Known Limitations**

In the Acumatica mobile app, a user cannot create a project quote based on an opportunity if this opportunity includes user-defined fields that are required. To create a project quote from this opportunity, the user should use the web version.

# Projects and Construction: Usage of Free Stock for Projects with Project-Specific Inventory

A project uses the project-specific inventory if it has the *Track by Project Quantity* or *Track by Project Quantity and Cost* inventory tracking mode selected on the **Summary** tab of the *Projects* (PM301000) form. In previous versions of Acumatica ERP, users were able to directly issue materials for a project that uses the project-specific inventory only if the items were on hand for the project cost layer of the exact project and project task. If the materials were on hand but not allocated for the project (that is, the materials were in free stock), a user had to process an inventory transfer from the free stock to the project stock first.

Projects that use the project-specific inventory are available if the *Project-Specific Inventory* feature is enabled on the *Enable/Disable Features* (CS100000) form.

In Acumatica ERP 2025 R1, the functionality related to project-specific stock has been enhanced. Now users can issue free stock for projects with the project-specific inventory without processing manual inventory transactions. The system automatically performs the needed transfer operations and generates the corresponding inventory transactions.

## **Changes to the Project-Related Forms**

For the projects that have the *Track by Project Quantity* or *Track by Project Quantity and Cost* inventory tracking mode selected on the **Summary** tab of the *Projects* (PM301000) form, a user now can specify whether free stock items can be issued for these projects. On the same tab, the **Allow Issue from Free Stock** check box is now available (see the following screenshot).

HOTEL - The Beach	Hotel and Condominiums (Warner Street)	C NOTES FLES CUSTOMZATION TOOLS -
6 E E 0	+ B K < > > COMPLETE HUN HULING	
+ Project ID Template Nature Description	HOTEL P Contoner EQUGRP - The Equity Group Investor P P Project Hanager EP00000233 - Ellen Watson P Adver The Brack Hilds and Condominiares (Marrier Street)	Autual Income 22.867,202.71 Actual Expension 12.705,015.16 Margin Amount 8.862.125.55 Warger (%). 43.66 Panding Invasion Amount. 8.00
SUMMARY TRONS PROJECT PROPERTIES	REVENUE BUDGET COST BUDGET BALANCES INVOICES CHANGE ORDERIS CHANGE RE	QUESTE UNION LOCALS ACTIVITIES
Revenue Budget Level	Task and Cost Code - Portunage Mode Standard	
Cost Sudget Level	Text and Cost Code - Currison Total 39,745,457.00 [] Inc	lete CO
+ Start Date	312625 Campbrid (%) 57.67	
EndDate	C Tend Tenanted Amount 1,133,360.15	
Project Group	p / Find Restage	
Time Activity Apprevar	EP90000013 - Ellen Watson 🖉 🖸 Ratalinage with Steps	
Last Revenue Change N	factorização (%) 8.00	
Investory Tacking	Track by Project Quantity and Cost - Alth	
	Alternation From Stock AM Lavel. Survivary	
	Change Order Washing Last Application Hitz 8062	
	Allow Adding New News, on the Fig.	agrint .
	Cillustici Engligees VISBLITY IETTROS	
	Chattic Epigment OK OAR	<b>1</b> 30 <b>1</b> 20
	🗋 Track Production Data 🛛 🖸 CA 🚺 CSM	
	Cartined Jub Direc Erities DEput	m1999

Figure: The new check box in the project settings

The user selects this check box for a particular project to allow the issuing of the stock that is not allocated to any project in the project-related documents that are created on the *Issues* (IN302000), *Sales Orders* (SO301000), *Materials* (AM300000), and *Vendor Shipments* (AM310000) forms.

Also, to provide users the capability to quickly create projects that allow the issuing of free stock, the **Allow Issue from Free Stock** check box has been added on the **Summary** tab of the *Project Templates* (PM301000) form.

#### **Changes to Inventory and Order Management Forms**

For stock items, a user can now specify the default source that the system will insert in the document lines that are associated with the projects that use the *Track by Project Quantity* or *Track by Project Quantity and Cost* inventory tracking mode.

For this purpose, on the **Inventory Planning** tab of the *Stock Items* (IN202500) form, the **Default Inventory Source for Projects** box has been added (see the screenshot below). For each stock item, a user can define the default source from which the system will issue the items on the *Sales Orders* (SO301000), *Materials* (AM300000), and *Vendor Shipments* (AM310000) forms.

The following options are available in the box:

- Project Stock: The system will issue the items from the project-specific layer by default.
- Free Stock: The system will issue the items that are not allocated to any projects by default.

CONCRBK8 - Con	orete blocks, 8	-inch						
• = = +	10 E	D + K K >	ы					
• Intentory ID Joine Tables Description	CONCREMS - C Active - Concrete block	Concrete blocks, 8-inch <i>(p</i>	Product Workgroup Product Manager		م م			
LENERAL PRICES	ost www.ch	ouses venoors	ATTREUTES PACHAGING	CROSS-RETERE	NCE RELATE	DITEMS B	VENTORY PLN	NHG .
Default Inventory Source Regionistement Parameter	Ar Prosids.	Project Stock + Free Stock Project Stock						
≅ "Repl. "Second Clars	illy Searce	Method	Saplacologiant Waterbauxe	Man, Lawrich Shuff Date Life (Days)	Seminator Deb	Service Level (%)	Safety Steels	Rearder Point

#### Figure: Stock item settings

The Inventory Source column has been added on the Details tab of the following forms:

- Sales Orders (SO301000)
- *Receipts* (IN301000)
- *Issues* (IN302000)
- Adjustments (IN303000)

The option selected in this column (*Project Stock* or *Free Stock*) specifies from which source the items will be issued. The items can be issued from the free stock in sales orders and inventory issues only if the **Allow Issue from Free Stock** check box is selected for the project specified in the document line.

The **Cost Layer Type** column has been preserved for backward compatibility; now the column is hidden by default on the **Details** tab of the listed forms and cannot be edited. The value in this column is specified based on the combination of the inventory source selected in the line and the inventory tracking mode selected in the corresponding project.

On the *Transfers* (IN304000) form, the **From Inventory Source** and **To Inventory Source** columns have been added on the **Details** tab. In these columns, the user specifies the original source and the destination source for the inventory transfer transactions.

The **Cost Layer Type** and **To Cost Layer Type** columns have been preserved for backward compatibility; now the columns are hidden by default on the **Details** tab of the form and cannot be edited. The values in these columns are specified based on the combination of the inventory source selected in the line and the inventory tracking mode selected in the corresponding project.

On the *Sales Orders* form, a user can allocate the items for the sales order lines in which *Free Stock* is specified in the **Inventory Source** column. To do this, the user clicks **Line Details** on the table toolbar, selects the **Allocated** check box in a line, and specifies the quantity of items to be allocated.

### **Changes to Manufacturing Forms**

For the manufacturing documents that are related to projects, the changes listed below have been made to the **Details** tab of the *Materials* (AM300000) and *Vendor Shipments* (AM310000) forms:

- The **Inventory Source** column has been added. The option specified in this column (*Project Stock* or *Free Stock*) indicates from which source the items will be issued. The items can be issued from the free stock only if the **Allow Issue from Free Stock** check box is selected for a project specified in the document line.
- The **Split** button has been added. A user can click this button if for the currently selected line, the projectspecific layer has insufficient items available and the project associated with the production order selected in the line allows issue from free stock. The system will automatically create an additional line on the tab and allocate the rest of the quantity from the free stock.

### Changes to the Calculation of Item Quantities in Manufacturing

The rules of calculating item quantities have been revised for the stock items that are issued from free stock for production orders integrated with projects that use project-specific inventory. These are the production orders that have the **Update Project** check box selected in the **Project** section of the **References** tab of the *Production Order Maintenance* (AM201500) form.

On the *Material Wizard* 2 (AM300020) form, the *Available Qty. for Project* values are now calculated as follows:

- If a location is specified for a material in the production order details: The *Available Qty. for Project* is calculated as the total quantity of item hard available in this warehouse location.
- If no location is specified for a material in the production order details: The *Available Qty. for Project* is calculated as the total quantity of item hard available in all locations in the warehouse in which the **Production Allowed** and **Sales Allowed** check boxes are selected on the *Warehouses* (IN204000) form.

On the *Critical Materials* (AM401000) form, the **Qty. On Hand for Project** is calculated as the total quantity of the item that is on hand on the normal cost layer of the applicable warehouse locations. The applicable locations are those in which the **Production Allowed** and **Sales Allowed** check boxes are selected on the *Warehouses* form.

# Retail Commerce: Import of Orders Without Importing Customers

In Acumatica ERP 2024 R2 and previous versions, when the *Sales Order* entity was activated for a Shopify or BigCommerce store, the activation of the *Customer* entity was required. When a new customer registered in a store and placed an order, the order was imported to Acumatica ERP along with the customer.

In Acumatica ERP 2025 R1, if users do not need to process the customer data in Acumatica ERP, they can import orders from Shopify and BigCommerce stores without importing customers using a generic guest customer instead.

# **Configuring the Import of Orders Without Customers**

The following topics describe the configuration of the order synchronization with customers between Acumatica ERP and each of the external stores:

- Shopify: The Minimal Configuration of Order Synchronization section of the Order Synchronization: General Information topic
- BigCommerce: The *Minimal Configuration of Order Synchronization* section of the *Order Synchronization: General Information* topic

To configure the synchronization of orders without customers for the Shopify or BigCommerce store, an administrative user should perform the steps described in the topics listed above with the following differences on the *Shopify Stores* (BC201010) or *BigCommerce Stores* (BC201000) form:

- Skipping the activation of the *Customer* entity on the **Entities** tab. That is, the **Active** check box remains cleared for the *Customer* entity, and no steps are performed to activate the entity.
- Specifying a guest customer in the **Generic Guest Customer** box on the **Customers** tab, as the following screenshot shows for a Shopify store.

Shopify Shopify			custo	WIZATION TOOLS -
6 ∅ ∅ 0 +	≡ о⊸ к к	> >1	TEST CONNE	ECTION
Connector Sho	aty.		Active	
Store Name     Sho	аłų	ρ.	Cefault	
GENERAL ENTITIES	USTOMERS INVENTORY	ORDERS	PAYMENTS	SHIPPING
CUSTOMER				
Customer Class	p	1		
Customer Numbering Template				
Customer Numbering Sequence	p	1		
Location Numbering Template:				
Location Numbering Sequence	Q	1		
Generic Guest Customer	ECOMGUEST - eCommerce ,0	1		
	Use Multiple Guest Accounts			

Figure: The guest customer specified for a Shopify store

When the system imports orders from the Shopify or BigCommerce store, the guest customer specified for the store is assigned as the customer for each created sales order. The system does not import customers from the store and does not create new customer records.

# Retail Commerce: Import of Shopify Documents in the Default Store Currency

A Shopify store can support multiple currencies, one of which is the default store currency. Users can pay their orders in a currency that is different than the default one.

In Acumatica ERP 2024 R2 and previous versions, the system imported an order and the related documents, such as payments and refunds, from a Shopify store in the currency in which the order was paid in the store.

To support the scenarios when users do not need multicurrency accounting, Acumatica ERP 2025 R1 allows administrative users to import orders and the related payments and refunds from Shopify using only the default store currency.

### Importing Documents in the Default Store Currency

To make the system import documents from the Shopify store in only the default store currency, an administrative user selects the **Import in External Default Currency** check box on the **Orders** tab of the *Shopify Stores* (BC201010) form. (See the following screenshot.)

Shopify Shopify		CUSTOMZATION	TOOLS -
6 0 0 A	+ 🗉 о - к < > н	TEST CONNECTION	
Connector + Store Name	Shapity P	Active Default	
Danch     ORDER	RETAIL - SweetLife Store	p / TAXES	
Order Type for Import Order Types for Export Return Order Type	EO - eCommerce Order	Default Tax Zone     Une as Primary Tax Zone     SUBSTITUTION LISTS	
Refund Annuart Item Refund Reason Code	REFUNDAMT - eCommerce Refund Amount Item	p      r Taxes     SPCTAXCODES     p      r Tax Calegories     SPCTAXCLASSES	P / P /
Order Time Zone Show Discounts As	(GMT-05.00) Eastern Time (US & Canada) Line Discounts	Shipping Carriers: SPCCARRIERS     Payment Terms	P /
Hold on Risk Status	🖬 Import Order Riaka High Riak	POINT-OF-SALE ORDERS     Depart POS Orders	
Gift Certificate Item Earliest Order Date	0	Order Type for Import     Order Type for Import     Order Type for Import	1
	Allow Adding Rems to Processed Onters	SHIPPED POS ORDERS . Order Type for Import	-,

#### Figure: The new currency setting on the Shopify Stores form

With the check box selected, the system imports orders from the Shopify store in the default store currency even if they were paid in another currency. The system can import all the documents related to these orders as payments and refunds in the default store currency as well. To set this up, the administrative user also configures proper mappings that have the default store currency on the **Payments** tab of the *Shopify Stores* form.

The following limitations apply to the import of documents in the default store currency:

• If a Shopify order has already been imported to Acumatica ERP in a currency that is different than the default store currency before the **Import in External Default Currency** check box is selected on the **Orders** 

tab of the *Shopify Stores* form, all the documents related to that order will be imported in the same order currency even with the **Import in External Default Currency** check box selected for the store.

• If a credit card payment is imported to Acumatica ERP in a currency other than the one in which the customer paid in the Shopify store, the payment can be captured, voided, or refunded only in the Shopify store.

# Retail Commerce: Improvements to the Mapping of Taxes for Shopify

Taxes in Shopify can have the same name but different rates, as the following screenshot shows.

Original order	July 22, 2024	\$102.26
Subtotal	2 items	\$200.00
Taxes	Tax details 🔿	
	Arkanisas State Tax (0.125%)	\$0.13
	Pulaski County Tax (1%)	\$2.00
	Little Rock City Tax (1.125%)	\$2.26
	Arkansas State Tax (6.5%)	\$6.50
Total		\$210.89

#### Figure: Taxes with the same name but different rates in Shopify

In Acumatica ERP 2024 R2 and previous versions, the mapping of taxes from Shopify with taxes configured in Acumatica ERP was performed by the tax name. In Acumatica ERP 2025 R1, the mapping of taxes has been improved to support the import of taxes with the same name but different rates from Shopify.

# **Configuring the Mapping of Taxes**

i

To map taxes from Shopify with taxes from Acumatica ERP, an administrative user creates a substitution list on the *Substitution Lists* (SM206026) form. In the substitution list, the administrative user specifies a tax from the Shopify store in the **Original Value** column in either of the following ways (see the screenshot below):

- *<Tax Name>*: The tax name if the name is unique (for example, *Arkansas State Tax*).
- <*Tax Name>* <*Tax Rate>*: The tax name followed by the space character and the tax rate if there are multiple taxes with the same name but different rates (for example, *Arkansas State Tax 6.5%*).

The administrative user specifies the tax rate as a decimal followed by the % character, as it is represented in the Shopify store. For example, the tax rate of 6.5% is specified as 6.5% and the tax rate of 0.125% is specified as 0.125%.

If a user specifies the tax name along with the tax rate for a tax with a unique name, the system still correctly processes this mapping.

Substitution Li	sts	CUSTOMIZATION TOOLS .
a • +	0 0 -	ic c > >i
Substitution List	SPCTAXCODES	p ^
Table Name:		م
Field Name:		*
• + ×	H X 1	
Original Value		* Substitution Value
> Arkansas State Ta	¢ 0.125%	ASTFOOD
Arkansas State Ta	¢ 6.5%	AST
		LIRCT
Little Rock City Tao	62 C	ENOT

Figure: A substitution list for taxes

To use the created substitution list for the Shopify store, the administrative user specifies the substitution list in the **Taxes** box on the **Orders** tab of the *Shopify Stores* (BC201010) form. (See the following screenshot.)

Shopify Shopify		CUSTOMIZATION TOOLS	•
6 0 0 0	+ ≘ р∘кк > >	TEST CONNECTION	
Connector	Shopily	Active 2	
Stow Name	ShopHy ,D	🔁 Default	
GENERAL ENTITES	CUSTOMERS INVENTORY ORDERS	PROMENTS SHIPPING	
• Branch	RETAIL - SweetLife Store	p / TAXES	
ORDER		Tax Synchronization	
Order Type for Import	EO - eCommerce Order	p / Delault Tax Zone	e.
Order Types for Export		- Use as Primary Tax Zone	
Return Order Type:		p / substitution usts	
Refund Amount Item	REFUNDAMT - eCommerce Refund Amount Item	ρ ≠ Taxes P	1
Raturd Reason Code		p / +Tax Categories SPCTAXCLASSES P :	1
Order Time Zone:	(GMT-05-00) Eastern Time (US & Canada)	. Shipping Carriers SPCCARRIERS ,0 ,	1
Shew Discounts As	Line Discounts	, Payment Terms D	1

Figure: The substitution list for taxes specified for a Shopify store

# Retail Commerce: Improvements to Synchronization of Price Lists with Shopify

In Acumatica ERP 2024 R2 and previous versions, during the synchronization of the *Price List* entity for a Shopify store, the system created or updated the product catalogs that corresponded to the exported price classes. The system added to each catalog all the products, including those that had no prices defined within the corresponding price class. For more information about the synchronization of price lists, see *Sales Price Lists: General Information*.

In Acumatica ERP 2025 R1, the export of price lists has been improved so that the product catalogs include only products whose prices (of the corresponding price class) were effective on the synchronization date.

### **Export of Sales Prices**

During the synchronization of the *Price List* entity for a Shopify store, the system creates or updates the catalog that corresponds to the exporting customer price class of the *Customer Price Class* type specified on the *Sales Prices* (AR202000) form.

In the **Included** section of the catalog (see the following screenshot), the system adds all the inventory items of the price class that have sales prices effective on the date of the synchronization on the *Sales Prices* form. The rest of the products, which have been already synchronized with the Shopify store but have no effective prices within the price class, are added to the **Excluded** section. The excluded items are hidden from customers assigned to the catalog.

← Product	s and prici	ng						
Included Prod	ucts cally include new	products in	Overall adjusts Price decreas	nent 10 2 -	0 %	Price overrides Fixed pricing Volume pricing	4 varia 2 varia	unts ants
Al Include	d Excluded						Q. W	71
0	Product 👌	Publishing	Price			Quantity rules	Volume pricing	
0 0	Apple jam 32 oz I variant	Included	\$ 99.60					
	Apple jam 8 oz. I venant	included	\$ 4.15					

Figure: The Included and Excluded sections of a product catalog at a Shopify store

# Retail Commerce: Replacement of REST API with GraphQL API for Shopify

Shopify is deprecating the REST API for apps and integrations after February 1, 2025, and switching to GraphQL instead. In Acumatica ERP 2025 R1, the corresponding changes have been implemented in the e-commerce connector. The connector synchronizes the following entities by using GraphQL:

• Stock Item

i

- Non-Stock Item
- Template Item
- Product Availability

## **Stock Item and Non-Stock Item Entities**

The following table shows how the e-commerce connector maps Acumatica ERP fields to Shopify fields when it synchronizes stock items and non-stock items with Shopify by using the GraphQL API.

For details about the mapping for the Shopify user interface, see *Stock Item Entity* and *Non-Stock Item Entity*.

Source Fields in Acumatica ERP		Target Fields in Shopify				
Field Name	Form Object	Field Name for Query	Object	Туре		
The Stock Items (I the exported item or the Non-Stock I form if the export stock item	N202500) form if i is a stock item ( <del>tems</del> (IN202000) ed item is a non-					
Description	Summary area	title	ProductCreateInput / ProductUpdateIn- put	String		
Item Class	General tab, Item Defaults section	productType	ProductCreateInput / ProductUpdateIn- put	String		
Description	Description tab	descriptionHtml	ProductCreateInput / ProductUpdateIn- put	HTML		
Vendor ID	Vendors tab	vendor	ProductCreateInput / ProductUpdateIn- put	String		
Search Key- words	eCommerce tab	tags	ProductCreateInput / ProductUpdateIn- put	String		
Category ID	Attributes tab, Sales Cate- gories table	tags	ProductCreateInput / ProductUpdateIn- put	String		

Table: Stock Item and Non-Stock Item Import/Export Mapping

Source Fields in Acumatica ERP		Target Fields in Shopify			
Field Name	Form Object	Field Name for Query	Object	Туре	
<b>Visibility</b> : Visi- ble	eCommerce tab	status: ACTIVE	ProductCreateInput / ProductUpdateIn- put	String	
Visibility: Fea- tured	eCommerce tab	status: ARCHIVED	ProductCreateInput / ProductUpdateIn- put	String	
<b>Visibility</b> : Invisi- ble	eCommerce tab	status: DRAFT	ProductCreateInput / ProductUpdateIn- put	String	
Inventory ID	Summary area	sku	ProductVariantsBulkInput / ProductVari- antsBulkUpdate	String	
Weight	Packaging tab, Dimensions section	inventoryltem.mea- surement.weight.val- ue	ProductVariantsBulkInput.inventoryItem > InventoryItemInput.measurement > In- ventoryItemMeasurementInput.weight	Deci- mal	
Weight UOM	Packaging tab, Dimensions section	inventoryltem.mea- surement.weight.unit	ProductVariantsBulkInput.inventoryItem > InventoryItemInput.measurement > In- ventoryItemMeasurementInput.weight	String	
Default Price	Price/Cost tab, Price Manage- ment section	price	ProductVariantsBulkInput / ProductVari- antsBulkUpdate	Money	
Tax Category	General tab, Item Defaults section	taxable	ProductVariantsBulkInput / ProductVari- antsBulkUpdate	Boolean	
MSRP	Price/Cost tab, Price Manage- ment section	compareAtPrice	ProductVariantsBulkInput / ProductVari- antsBulkUpdate	Money	
Alternate Type: GTIN/EAN/UPC/ ISBN or Barcode	Cross-Refer- ence tab	barcode	ProductVariantsBulkInput / ProductVari- antsBulkUpdate	String	
Stock Item	General tab, General Set- tings section	requiresShipping	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
Page Title	eCommerce tab	Product.seo.title	ProductCreateInput.seo / ProductUp- dateInput.seo	String	
Meta Descrip- tion	eCommerce tab	Product.seo.descrip- tion	ProductCreateInput.seo / ProductUp- dateInput.seo	String	

# **Template Item Entity**

The following table shows how the e-commerce connector maps Acumatica ERP fields to Shopify fields when it synchronizes template items with Shopify by using the GraphQL API.



For details about the mapping for the Shopify user interface, see *Template Item Entity*.

#### Table: Template Item Import/Export Mapping

Source Fields in A	cumatica ERP	Target Fields in Shopify			
Field Name	Form Object	Field Name for Query	Object	Туре	
The <i>Template Iterr</i> form	os (IN203000)				
Description	Summary area	title	ProductCreateInput / ProductUpdateIn- put	String	
Item Class	General tab, Item Defaults section	productType	ProductCreateInput / ProductUpdateIn- put	String	
Description	Description tab	descriptionHtml	ProductCreateInput / ProductUpdateIn- put	HTML	
Vendor ID	Vendors tab	vendor	ProductCreateInput / ProductUpdateIn- put	String	
Search Key- words	eCommerce tab	tags	ProductCreateInput / ProductUpdateIn- put	String	
Category ID	Attributes tab, Sales Cate- gories table	tags	ProductCreateInput / ProductUpdateIn- put	String	
<b>Visibility</b> : Visi- ble	eCommerce tab	status: ACTIVE	ProductCreateInput / ProductUpdateIn- put	String	
Visibility: Fea- tured	eCommerce tab	status: ARCHIVED	ProductCreateInput / ProductUpdateIn- put	String	
<b>Visibility</b> : Invisi- ble	eCommerce tab	status: DRAFT	ProductCreateInput / ProductUpdateIn- put	String	

As part of the synchronization of the *Template Item* entity, .matrix items are exported to Shopify. The following table shows how the e-commerce connector maps Acumatica ERP fields to Shopify fields when it synchronizes matrix items with Shopify by using the GraphQL API.

Source Fields in Acumatica ERP		Target Fields in Shopify			
Field Name	Form Object	Field Name for Query	Object	Туре	
The Template Items form					

Source Fields in Acumatica ERP		Target Fields in Shopify			
Field Name	Form Object	Field Name for Query	Object	Туре	
Attribute	<b>Configuration</b> tab, <b>Attributes</b> section	options	ProductCreateBulkInput / ProductUp- dateBulkInput	Array	
Attribute Value	Item Creation tab	options values	ProductCreateBulkInput / ProductUp- dateBulkInput	Array	
Default Price	Price/Cost tab, Price Manage- ment section	price	ProductCreateBulkInput / ProductUp- dateBulkInput	Money	
Tax Category	General tab, Item Defaults section	taxable	ProductCreateBulkInput / ProductUp- dateBulkInput	Boolean	
MSRP	Price/Cost tab, Price Manage- ment section	compareAtPrice	ProductCreateBulkInput / ProductUp- dateBulkInput	Money	
Page Title	eCommerce tab	Product.seo.title	ProductCreateInput.seo / ProductUp- dateInput.seo	String	
Meta Descrip- tion	eCommerce tab	Product.seo.descrip- tion	ProductCreateInput.seo / ProductUp- dateInput.seo	String	
Availability: Set as Available (Track Qty.)	eCommerce tab	invento- ryltem.tracked: true	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
<b>Availability</b> : Set as Available (Don't Track Qty.)	eCommerce tab	invento- ryltem.tracked: false	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
<b>Availability</b> : Set as Pre-Order	eCommerce tab	invento- ryltem.tracked: false	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
<b>Availability</b> : Do Not Update	eCommerce tab	<i>invento-</i> <i>ryItem.tracked</i> : No changes	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
<b>Availability</b> : Set as Unavailable	eCommerce tab	invento- ryltem.tracked: false	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
When Qty. Un- available: Do Nothing	eCommerce tab	<i>inventoryPolicy</i> : No changes	ProductVariantsBulkInput.inventoryPoli- cy / ProductVariantsBulkUpdate.invento- ryPolicy	String	

Source Fields in A	cumatica ERP	Target Fields in Shopify			
Field Name	Form Object	Field Name for Query	Object	Туре	
When Qty. Un- available: Set as Unavailable	eCommerce tab	inventoryPolicy: DE- NY	ProductVariantsBulkInput.inventoryPoli- cy / ProductVariantsBulkUpdate.invento- ryPolicy	String	
When Qty. Unavailable: Set as Pre-Or- der/Continue Selling	eCommerce tab	inventoryPolicy: CON- TINUE	ProductVariantsBulkInput.inventoryPoli- cy / ProductVariantsBulkUpdate.invento- ryPolicy	String	
The Stock Items (I if the matrix item or the Non-Stock I form if the matrix stock item	N202500) form is a stock item items (IN202000) item is a non-				
Inventory ID	Summary area	sku	ProductVariantsBulkInput / ProductVari- antsBulkUpdate	String	
Weight	Packaging tab, Dimensions section	inventoryltem.mea- surement.weight.val- ue	ProductVariantsBulkInput.inventoryItem > InventoryItemInput.measurement > In- ventoryItemMeasurementInput.weight	Deci- mal	
Weight UOM	Packaging tab, Dimensions section	inventoryltem.mea- surement.weight.unit	ProductVariantsBulkInput.inventoryItem > InventoryItemInput.measurement > In- ventoryItemMeasurementInput.weight	String	
Alternate Type: GTIN/EAN/UPC/ ISBN or Barcode	Cross-Refer- ence tab	barcode	ProductVariantsBulkInput / ProductVari- antsBulkUpdate	String	

# **Product Availability Entity**

i

The following table shows how the e-commerce connector maps Acumatica ERP fields to Shopify fields when it exports the availability of stock items to Shopify by using the GraphQL API.

For details about the mapping for the Shopify user interface, see *Product Availability Entity*.

#### Table: Product Availability Export Mapping

Source Fields in Acumatica ERP		Target Fields in Shopify		
Field Name	Form Object	Field Name for Query	Object	Туре
The Stock Items (I	N202500) form			
<b>Availability</b> : Set as Available (Track Qty.)	eCommerce tab	invento- ryItem.tracked: true	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean

Source Fields in Acumatica ERP		Target Fields in Shopify			
Field Name	Form Object	Field Name for Query	Object	Туре	
<b>Availability</b> : Set as Available (Don't Track Qty.)	eCommerce tab	invento- ryltem.tracked: false	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
<b>Availability</b> : Set as Pre-Order	eCommerce tab	invento- ryItem.tracked: false	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
<b>Availability</b> : Do Not Update	eCommerce tab	<i>invento-</i> <i>ryItem.tracked</i> : No changes	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
<b>Availability</b> : Set as Unavailable	eCommerce tab	invento- ryItem.tracked: false	ProductVariantsBulkInput.inventoryItem / ProductVariantsBulkUpdate.invento- ryItem	Boolean	
The Shopify Stores when <b>When Qty.</b> I to Store Default or tab of the Stock Ite	s (BC201010) form Unavailable is set a the <b>eCommerce</b> ems form		<u>.</u>		
When Qty. Un- available: Do Nothing	eCommerce tab	<i>inventoryPolicy</i> : No changes	ProductVariantsBulkInput.inventoryPoli- cy / ProductVariantsBulkUpdate.invento- ryPolicy	String	
When Qty. Un- available: Set as Unavailable	eCommerce tab	inventoryPolicy: DE- NY	ProductVariantsBulkInput.inventoryPoli- cy / ProductVariantsBulkUpdate.invento- ryPolicy	String	
When Qty. Unavailable: Set as Pre-Or- der/Continue Selling	eCommerce tab	inventoryPolicy: CON- TINUE	ProductVariantsBulkInput.inventoryPoli- cy / ProductVariantsBulkUpdate.invento- ryPolicy	String	

# Fields Unavailable in GraphQL

The following table shows the Shopify fields that were available during the synchronization of the *Stock Item*, *Non-Stock Item*, and *Template Item* entities through the REST API but are unavailable with GraphQL.

Table: External Fields Unavailabl	e Through GraphQL: Stock It	tem, Non-Stock Item, and Template Item
-----------------------------------	-----------------------------	--

Tabs of the <i>Entities</i> (BC202000) form	External Object	External Field	REST API Object	REST API Field
Import Mapping, Import Filtering	Product	Published		Published

Tabs of the <i>Entities</i> (BC202000) form	External Object	External Field	REST API Object	REST API Field
Import Mapping, Import Filtering, Export Mapping	Product	PublishedScope		PublishedScope
Import Mapping, Export Mapping	Product -> Product Variants	FulfillmentService	Product > Product Variants	fulfillmen- t_service
		PresentmentPrices	Product > Product Variants	presentmen- t_prices

The following table shows the Shopify fields that were available during the synchronization of the *Product Availability* entity through the REST API but are unavailable with GraphQL.

Table: External Fields Unavailable Through GraphQL: Product Availability

External Field	REST API Object	REST API Field	
RelocatelfNecessary	InventoryLevel	relocate_if_necessary	
DisconnectIfNecessary	InventoryLevel	disconnect_if_necessary	

# Retail Commerce: Synchronization of Shipments to Amazon Fulfillment Centers

Acumatica ERP supports the import of marketplace-fulfilled orders from Amazon stores. To fulfill these orders, merchants send *inbound shipments* with items to Amazon fulfillment centers, and Amazon uses the stock sent to handle the order fulfillment. However, items sent to Amazon fulfillment centers may be lost or damaged during shipping and receiving. As a result, the stock data in Acumatica ERP may be inaccurate and thus may not match the quantity of items received by Amazon.

To streamline inventory management and improve the accuracy of inventory stock, Acumatica ERP 2025 R1 allows the synchronization of inbound shipments sent from merchants to Amazon fulfillment centers.

## **Configuration of the Store**

To configure the system to import inbound shipments sent to Amazon fulfillment centers, an administrative user should perform the following steps on the *Amazon Stores* (BC201020) form:

- 1. Activating the Marketplace Transfer Order and Marketplace Transfer Receipt entities on the Entities tab.
- Specifying an order type in the Order Type for Import box on the Inventory tab (Item 1 in the screenshot below). The system will use the specified order type to create transfer orders during the import of inbound shipments. The selected order type must have the *TR Transfer* order template specified on the *Order Types* (SO201000) form.
- 3. Specifying a date in the **Earliest Shipment Date** box on the **Inventory** tab (Item 2). The system will import inbound shipments from Amazon created on or after the specified date.
- 4. Specifying the merchant warehouse in the **Source Warehouse** box on the **Inventory** tab (Item 3). This is the warehouse from which stock items are shipped to the Amazon fulfillment center. The source warehouse must differ from the marketplace warehouse specified on the **Orders** tab for the store.
- 5. Specifying the warehouse that represents the Amazon fulfillment center in the **Marketplace Warehouse** box on the **Orders** tab. The merchant sends stock items to that warehouse, and Amazon fulfills the merchant's orders from the warehouse. The marketplace warehouse must differ from the source warehouse specified on the **Inventory** tab for the store.
- 6. Optional: Specifying a substitution list configured on the *Substitution Lists* (SM206026) form in the **Ship-Via Codes to Carriers** box on the **Inventory** tab (Item 4). The system will use this substitution list to match carrier names from the Amazon store with ship-via codes from Acumatica ERP.

Amazon Amazon Sto	re			CUSTOMIZATION TOOLS -
6 D D 0	+ в о - к	>>		JTHORIZE
Connector	Amazon		Z Active	
Store Name	Amazon Store	Q,	Default	
GENERAL ENTITIES	INVENTORY ORDERS	FRYMENTS -	SHIPPING	
INVENTORY SETTINGS -			MARKETPLACE TRANSPER	ORDERS
Availability Mode	Available for Shipping		Order Type for Import	1R - Transfer 🔎 🥓
Warshouse Mode	All Warehouses		<ul> <li>Earliest Shipmont Date:</li> </ul>	O 1/1/2025 E
			Source Warehouse:	🔕 WHOLESALE - Wholesale W ,P 🥒
			SUBSTITUTION LISTS	
			Ship-Via Codes to Carriers	0 0

Figure: New inventory settings on the Amazon Stores form

In addition to specifying store settings, the administrative user has the ability to configure filtering and mapping rules for the *Marketplace Transfer Order* entity on the *Entities* (BC201020) form, if needed.

#### Import of Inbound Shipments from Amazon

While the administrative user prepares and processes the data for the *Marketplace Transfer Order* entity on the *Prepare Data* (BC501000) and *Process Data* (BC501500) forms, the system imports from Amazon inbound shipments sent from the merchant warehouse to the Amazon fulfillment center. The system imports only the inbound shipments created on or after the date specified in the **Earliest Shipment Date** box on the **Inventory** tab of the *Amazon Stores* (BC201020) form.

For each imported inbound shipment, the system creates a transfer order on the *Sales Orders* (SO301000) form with the type specified in the **Order Type for Import** box on the **Inventory** tab of the *Amazon Stores* form. In each line of the created transfer order, the system inserts the source warehouse specified for the Amazon store in the **Warehouse** column on the **Details** tab of the *Sales Orders* form. In the **Destination Warehouse** box of the Summary area, the system inserts the marketplace warehouse specified for the Amazon store.

During the preparation and processing of the data for the *Marketplace Transfer Receipt* entity on the *Prepare Data* and *Process Data* forms, the system creates a purchase receipt of the *Transfer Receipt* type on the *Purchase Receipts* (PO302000) form for the imported transfer order if the following conditions are met:

- The corresponding inbound shipment in Amazon is being received (has the *Receiving* status) or has been received (has the *Closed* status).
- The transfer order has been processed and has a released transfer of the 2-Step type created on the Transfers (IN304000) form.

#### **Limitations of Importing Inbound Shipments**

The following limitations apply to the import of inbound shipments:

- The connector can import inbound shipments created only within the last 18 months. To avoid data inconsistencies, we recommend specifying a date within the past 18 months in the **Earliest Shipment Date** box on the **Inventory** tab of the *Amazon Stores* (BC201020).
- When users process the data for the *Marketplace Transfer Order* entity on the *Prepare Data* (BC501000) form, the connector creates sync records with the *Invalid* status for inbound shipments that have not been imported yet but have already been closed in Amazon. These records are excluded from further processing. If users need to import these inbound shipments, they need to force-synchronize the corresponding sync records on the *Sync History* (BC301000) form.
- The synchronization of inbound shipments with lot- or serial-tracked inventory items is partially supported because Amazon does not provide any information about the lot or serial numbers of the received items.

During the processing of the *Marketplace Transfer Order* entity, the connector creates a transfer order for an inbound shipment with lot- or serial-tracked items without information about lot or serial numbers. Users need to manually process the transfer order to add lot or serial numbers for the shipping items. After the processing of the transfer order is finished and a transfer of the *2-Step* type has been created and released on the *Transfers* (IN304000) form, users skip the processing of the *Marketplace Transfer Receipt* entity. Instead, they manually create a purchase receipt of the *Transfer Receipt* type on the *Purchase Receipts* (PO302000) form for the transfer order.

• The synchronization of inbound shipments with non-stock kits is partially supported.

When a 2-step transfer is created for a transfer order with a non-stock kit on the *Transfers* form, Acumatica ERP automatically adds the components of the non-stock kit to the transfer based on the kit specification from the *Kit Specifications* (IN209500) form. A user needs to process this transfer manually.

• During the processing of the *Marketplace Transfer Receipt* entity, if the quantity of an item received in Amazon is either less than the quantity received in Acumatica ERP or greater than the initially shipped quantity, the connector does not add the item to the created purchase receipt. Users need to manually process these items.
Users need to create a purchase receipt of the *Transfer Receipt* type for the initially shipped quantity of the item on the *Purchase Receipts* form. For the discrepancy between the shipped and received quantities, users need to create an inventory adjustment on the *Adjustments* (IN303000) form with a positive value for the exceeded quantity or with a negative value for the insufficient quantity.

- The connector may experience delays with the processing of already-imported inbound shipments because Acumatica ERP does not provide the date of the shipment modification. Consider an inbound shipment that has been imported to Acumatica ERP, and then some changes have been made to the shipment in Amazon. If users need to receive these changes in Acumatica ERP as soon as possible, they should force-synchronize the sync record of the inbound shipment on the *Sync History* form.
- To comply with the limitations of the Amazon API and to optimize the system load, we recommended preparing and processing of the data for the *Marketplace Transfer Order* and *Marketplace Transfer Receipt* entities once a day at nighttime.

## System Administration: Email Scheduling for Reports

In previous versions of Acumatica ERP, a user could schedule the regular sending of reports in the system in either of the following ways, but both approaches had limitations:

- The user could schedule the sending of a report by using the *Send Reports* (SM205060) form, which is now obsolete and due for deprecation.
- On the *Business Events* (SM302050) form, the user could configure a business event with an email template as a subscriber to send the report as an attachment. However, configuring a business event requires specifying a data source, such as a generic inquiry or data entry form, which is not always suitable for the scheduling of reports.

Improvements in Acumatica ERP 2025 R1 address these limitations by enhancing email templates and report management, replacing outdated functionality, and providing comprehensive support for all report-scheduling scenarios.

### Scheduling of the Sending of a Report

On the report toolbar of all report forms, the **Schedule Template** button has been removed. To replace this outdated functionality, the new **Email Notification** tab has been added to these report forms. On this tab, a user can view the list of email templates used to send the report. Also, the user can start scheduling the sending of the report by clicking the **Schedule Report** button on the table toolbar of the tab (see the following screenshot).

The **Schedule Report** button is available only to users with at least the *Insert* level of access rights to the *Email Templates* (SM204003) form.

	y Sales Profitabilit	a				1004.8
	RUN REPORT	SAVE TEMPLATE	envoye.us	EDIT REPORT		
Terps	ana i		187			
	004	fault [] Strated				
-	REAL PARAMETERS	ADDITIONING BOILT MID	FEDERS IN	INT AND ENAL SETTINGS REPORT	TVERSIONS ENNE	NOTIFICATIONS
0	SCHEDULE REPORT	H 8				
1	- firmal hangests		Server ID	Relation	Aspert Tampiete	Report Template Damer
	D Daily Balan Professor	liv .		donaon@swertife asarple.com		
	D Date Sales Profiles	liter		Brown@sweetife.esample.iom	For Tom Brown	gibba

#### Figure: New Schedule Report button

When the user clicks **Schedule Report**, the system opens the *Email Templates* (SM204003) form in a new tab. By default, the system fills in the settings for the new email template as follows:

- In the Summary area, To, CC, BCC, and Subject are filled in with the values specified for the report in the Email Settings section of the Print and Email Settings tab of the report form. The Activity Type is set to Email.
- On the **Attached Reports** tab, **Report ID** is filled in with the report identifier, and **Report Format** is set to the format specified on the **Print and Email Settings** tab of the report form. Also, the report parameters are copied from the **Report Parameters** tab of the report form. If at the moment of report creation, a shared report template was selected in the **Template** box of the report form, its name will be inserted to the **Report Template** box.

When the user saves the email template, the **Send by Schedules** tab becomes available for the email template.

The following screenshot shows an email template that was created based on the shared report template of the *Daily Sales Profitability* (AR676000) report.

Daily Sales P	rofitability					C NOTES	PLES	OUSTOMIZATION	100L5 *
6 2 3	0 + 11 0 -	1¢ <	>	ж					
Nothing D	Daily Sales Profesbility		р.	+Advertiger	Enel		p		
+ Description:	Carly Sales Profitability								
Sene:			0.6						
Exam			p						
20	Brown@sweetife.example.com					1	P		
00.							P		
800							8		
-Dubject	Daily Sales Profitability					4	p		
NESSAGE 1	ACTACHED REPORTS SENO	(rices)	10						
Reports Attached	by Report ID				and the second of	10000			121
0 + X					underst inchanter	Por tan I	brown .		-
*Pagert 10		Report For	-	Distantial .	Report Parameters				
APE76000 - Daily B	lates ProfileBilly	POP			0				
					E Parameter Name	Parameter Volum		. Konto Antoniore	Describiden
					* CorpanyBrank	HEADOFFICE		8	
					Completed Tran			8	
					Customer			8	
					Document Type			8	
					From Date	V10025		18	
					Inventory			58	
					Related Trans	8		8	
					Report Formal	Burrary		8	
					To Date	10102025		.93	
					Wanhouse			8	

Figure: An email template created for a report

On the **Send by Schedules** tab of the form, the user can create and remove linked schedules or link the existing schedules to the email template. Also, they can review the history of a selected schedule. To schedule the email template, the user clicks **Create Schedule** on the table toolbar of the tab. The system opens the *Automation Schedules* (SM205020) form in a pop-up window, as shown in the following screenshot.

Daily Sales Profitability	Charles Accumulations
Auto Schedul K      A	Automation Schedules Discrete Fute outforwaterow 100x 2 0 + + + + + + + + + + + + + + + + + +

Figure: Automation Schedules form opened for an email template

The user specifies the settings of the schedule, saves their changes, and closes the pop-up window. The system displays the configured schedule in the table of the **Send by Schedules** tab of the *Email Templates* form. For details on configuring automation schedules, see *Scheduling Automated Processing*.

To view the history of the schedule execution, a user clicks **View Schedule History** on the tab. The system displays the details in the pop-up window, as shown in the following screenshot.

Daily Sales Profitability		[] some	14.03	CURITOR/CATION	100.8
• □ = • + ≡ □ • K K	> >/				
Automation Di Daily Same Profestion 0	+ Actually Type: Ereal				
Constitution Carly Same Profilability					
how J	5				
Part Andrew Andrew Andrew A					
Te Broangoweetife asserpti con		P			
.00					
800					-
Rutject Daily Rans Politically	View Schedule History				×
MEMORE ATTACHED REPORTS	0 + × H 8				18
X VEW SCHEDULE HISTORY CHEATE BOHEDULE	R Subsidie *Execution Date Economics Report	Description 1			18
Antive Bullentule D	F Wantly \$38721080000371 The record has been	Daily Sales Pro	ALC: N		181
17 West's Seen Publication					18
El Data Sena Profestive					
					187
				NO. 18 14	
				0.06	elli

Figure: The history of schedule executions

### Other Changes to the Email Templates Form

The implementation of this new functionality involved other changes to the *Email Templates* (SM204003) form. The most significant change is that the **Screen** box is now optional. Depending on whether the **Screen** box is filled in and the objects are linked to the template, the system hides certain UI elements or displays a warning for an element.

If **Screen** is empty and there are no linked business events, the system hides the following UI elements:

- The Attach Activity, Link to Entity, Link to Contact, and Link to Account boxes in the Summary area
- The Attach Report Opened by Action and Use Event as Data Source boxes on the Attached Reports tab
- The Send by Events tab

If Screen is empty and there is at least one linked business event, the system does the following:

- Hides the Attach Activity, Link to Entity, Link to Contact, and Link to Account boxes in the Summary area
- Hides the Attach Report Opened by Action and Use Event as Data Source boxes on the Attached Reports tab
- Displays a warning about the empty Screen box on the Send by Events tab and the linked business event

If Screen is specified and there are no linked schedules, the system does the following:

- Displays the **Attach Activity** box only if a data entry form is specified in the **Screen** box
- Displays the Link to Entity box only if a generic inquiry is specified in the Screen box
- Hides the Send by Events tab

If **Screen** is specified and there is at least one linked schedule, the system does the following:

• Displays the Attach Activity box only if a data entry form is specified in the Screen box

- Displays the Link to Entity box only if a generic inquiry is specified in the Screen box
- Displays a warning on the **Send by Schedules** tab and the linked schedule about the inability to retrieve values for screen data fields if they are used as placeholders

The absence of a value in the **Screen** box also affects the availability of data for placeholders used in an email template. If **Screen** is empty, only the **General Info** node is available in the lookup box's **Screen Fields** tab for the **To** box in the Summary area. Similarly, only the **General Info** node is available in the lookup box for adding data fields in the text editor on the **Message** tab.

### **Changes to the Automated Schedules Form**

On the *Automation Schedules* (SM205020) form, the new **Action** drop-down box has been added with the following options:

- *Mass-Process*: This new option is selected by default when a user creates a schedule from a processing form or directly on the *Automation Schedules* form.
- *Raise Business Event*: This option has been moved from the **Action Name** drop-down box and is inserted by default when a user initiates schedule creation on the *Business Events* (SM302050) form.
- Send Email Notification: This new option is inserted by default when a user initiates schedule creation on the *Email Templates* (SM204003) form.

The **Action Name** control has been changed from a drop-down box to a lookup box and made optional. It is available only if the *Mass-Process* option is selected in the **Action** drop-down box. The corresponding mass operation is inserted automatically based on the processing form specified in the **Screen ID** box.

The availability of the **Screen ID** box and the list of forms available for selection depend on the option selected in the **Action** drop-down box. The following table summarizes the limitations.

Option	Availability	Forms Available for Selection
Mass-Process	Available and required	Mass-processing forms only
Raise Business Event	Available and required	Inquiry forms only
Send Email Notification	Hidden and optional	Not applicable

Also, the new **Email Notifications** tab has been added to the *Automation Schedules* form. The tab is displayed if the *Send Email Notification* option is selected in the **Action** drop-down box.

### **Changes to the Automation Schedule Statuses Form**

The following changes have been made to the table that displays the list of schedules on the *Automation Schedule Statuses* (SM205030) form:

- The **Screen ID** column is now optional, and its values are no longer links that users can click to navigate to the specified forms.
- When a record with an empty value in the **Screen ID** column is selected, the system hides the **View Screen** button on the table toolbar.
- The **Description** column has been removed.
- The **Schedule ID** column has been added; its values are clickable links. When a user clicks a link, the system opens the *Automation Schedules* form with the selected schedule.

### Changes to the Automation Schedule History Form

In the Selection area of the Automation Schedule History (SM205035) form, the Screen box has been removed.

The following changes have been made to the table that displays the list of schedules on the form:

- The values in the **Screen ID** column are no longer links that users can click to navigate to the specified forms.
- The **Schedule** column has been renamed to **Schedule ID**.

## **Customization: Access Rights for Custom Forms**

Acumatica ERP 2025 R1 introduces improved management of access rights for custom forms.

In the Customization Project Editor, *screen* is used in UI labels to describe the Acumatica ERP form being developed.

### **Addition of Access Rights**

i

In Acumatica ERP 2024 R1, if a developer created a form and did not add access rights for this form to the customization project, the system assigned the *Revoked* access rights to the form for all user roles. As a result, the developer could not open the form after the customization project was published.

In Acumatica ERP 2025 R1, the system adds to the customization project the *Delete* access rights for the *Customizer* role for each new form. The developer can now test new forms without specifying access rights explicitly. After the developer has tested the changes, a system administrator can add the needed access rights to the customization project.

### **Changes to the Customization Project Editor**

When a developer creates a new form, the system displays a message that access rights will be added to the customization project. The the following screenshot shows the **Create Screen** dialog box with this message. (This dialog box opens when the developer clicks **Create Screen** on the page toolbar of the *Customized Screens* page.)

Customization Project E	ditor	Back Reload
File Publish Extension Library	Source Control	
UpdatesAccessRights •	Customized Screens	
Screens	O D + / CREATE SCREEN CUSTOMIZE EXISTING	SCREEN
Data Access Code	E Screen ID Title Is New Last Modified By	Last Modified Ob
Modern UI Files	Create Screen ×	
Reports	+ Screen ID IC 30.10.00	
Site Map	Craph Name     Request     Graph Namespace: Request	
Database Scripts Sustem Locales	+ Paga Title Request	
Import/Export Scienarios	Template Form (Form/New)	
Shared Filters	Access rights for the Customizer rate will be automatically added to the customization project.	
Wikis	CREATE CANCEL	
Web Service Endpoints		
Analytical Reports Push Notifications		

Figure: Message about the addition of access rights

After the developer clicks **Create** in the dialog box, the system adds the needed elements to the respective pages, as it did in previous versions. The following screenshot shows the *Access Rights* page with the added access rights (see Item 1). Notice that the *Apply and Keep* merge rule has been selected for these access rights (Item 2). This option indicates that the system will apply the access rights from the customization project to the form and keep them unchanged for the roles that are not included in the customization project.

Customization Project	t Editor				Back Reload
File Publish Extension Lib	rary Source Control				
UpdatesAccessRights •	Access Rights				
- SCREENS	0 0 0	× + R	ELOAD FROM DATABA	SE MANAGEA	CCESS RIGHTS
Data Access	🗄 Object Name	Description	Merge Sule	Last Modified By	Last Modified On
- CODE	> IC301000		Apply and Keep	admin admin	12/23/2024
Request Files (2) Modern UI Files Generic Inquiries Reports Dashboards Site Map (1) Database Scripts System Locales Import/Export Scenarios Shared Filters Access Rights (1) Wilkis Web Service Endpoints					

Figure: The Access Rights page with the added access rights

## Mobile Development: Dialog Result for the Close Button

In Acumatica ERP 2025 R1, a developer can specify a dialog result for the Close action (which corresponds to the X button on a screen toolbar) of a dialog box mapped to the mobile app in one of the following ways:

- Specify the dialog result in the CloseButtonDialogResult property of the dialog object
- Define the Close action in detail by using the CloseButtonDialogAction property of the dialog object



A developer can use only one of the approaches for each action.

### Specifying the Dialog Result for the Close Action

To specify the dialog result for the Close action, a developer needs to specify it in the CloseButtonDialogResult property of the dialog object. The possible values of the property correspond to the elements of the *WebDialogResult* enumeration. The following code shows an example of the dialog result value being specified for the Close action.

```
update screen SO301000 {
  add dialog "AddLine" {
    CloseButtonDialogResult = "No"
    ...
  }
}
```

## **Defining the Close Action**

A developer can define the Close action by doing the following:

- 1. In the dialog object, define an action by adding the dialogAction object.
- 2. In the dialogAction object, specify the dialog result in the dialogResult property. For more details, see *dialogAction*.



In the dialogAction object, there is no need to specify the CloseDialog property because the button closes the screen by default.

3. In the dialog object, specify the name of the action in the CloseButtonDialogAction property.

The following code shows an example of the Close action being defined in a dialog box.

```
update screen SO301000 {
    ...
    update dialog "AddLine" {
        CloseButtonDialogAction = "NoAction"
        update dialogAction "NoAction" {
            dialogResult = "No"
        }
    }
}
```

### **Related Links**

- dialog
- dialogAction

- Enum WebDialogResult Mapping a Smart Panel

# Mobile Development: Displaying the Progress and Results of Processing

The Acumatica mobile app connected to an instance of Acumatica ERP 2025 R1 can display the progress and the results of a processing operation.

When the processing is being performed, the app shows a dialog box with the progress of the operation. For processing screens, the dialog box may contain progress numbers, such as the elapsed time, the estimated remaining time, and the percent of completion. The following screenshots show examples of the dialog boxes that show the progress of the operation.



Figure: Processing dialog boxes

After the processing is completed, the app shows the results of the processing for each record included in the processing. The results of the processing are displayed on the *Processing* screen and are grouped by the following tabs: **Failed**, **Remaining**, **Total**. An example of the *Processing* screen is shown in the following screenshot.



### Figure: Results of the processing

This functionality is available out of the box, and no changes need to be made to the mapping of the screen.

### **Changes to the Mobile API**

The SyncLongOperation property has been deprecated for the following objects:

- recordAction
- containerAction
- listAction
- selectionAction

The SyncLongOperation property will be removed in the next major release.

# Platform API: Improved Logging in Connectors for External Systems

Acumatica ERP 2025 R1 introduces improved logging of events for the connectors for external systems. Now the system logs requests and events related to the connector on the *Request Profiler* (SM205070) form if a user specifies the following settings on this form:

- Log Requests (Apply Filter): Selected
- Log Events (Apply Filter): Selected
- Log Level: Verbose
- Category: Commerce

For the implementation of this improvement, multiple API changes have been made. A developer needs to update their implementation of the connector as described in the following sections. For more information about the implementation of a custom connector, see *Implementing a Connector for an External System*.

### Changes to the BCConnectorBase Class

The PX.Commerce.Core.BCConnectorBase<TGraph> abstract class now implements the PX.Commerce.Core.IConnector interface.Therefore, the BCConnectorBase<TGraph> abstract class now includes the following abstract methods:

- Process(ConnectorOperation operation, int?[] syncIDs = null, CancellationToken cancellationToken = default)
- GetSyncTime(ConnectorOperation operation)
- NavigateExtern(ISyncStatus status, ISyncDetail detail = null)
- ProcessHook(IEnumerable<BCExternQueueMessage> messages, CancellationToken cancellationToken = default)

A developer must override these methods in their implementation of a connector for an external system. Also, there is no need to derive the connector class from the IConnector interface.

### **Changes to the IProcessor and IConnector Interfaces**

All logging methods of the PX.Commerce.Core.IProcessor and PX.Commerce.Core.IConnector interfaces have been removed.

A developer must remove their previous implementation of these methods. Instead, the developer can use the methods that are provided in the PX.Commerce.Core.Logging.CommerceLoggerExtensions class. These methods extend the functionality of the Serilog.ILogger interface.

The following code shows an example of writing a log message. The example uses the PX.Commerce.Core.BCProcessorBase<TGraph, TEntityBucket, TPrimaryMapped>.Logger class, which uses the ILogger methods.

```
Logger.LogCommerceVerbose(
   BCLogScopeFactory.ForOperation(Operation),
   LogMessages.LogSyncPerformed,
   String.Join(", ", oprs));
```

## Platform API: Processing of API Rate Limits in a Connector for an External System

In Acumatica ERP 2025 R1, the built-in connectors for external systems (such as the BigCommerce, Amazon, and Shopify connectors) process responses with the 429 Too Many Requests response code differently. Previously, if the API rate limit of the external system was reached—that is, the 429 Too Many Requests response code was received the built-in connector ignored this error and retried the request without a delay. This request failed in most cases. Now if the 429 Too Many Requests response code is received, the connector checks the headers of the response to find the recommended delay for the request, and retries the request after this delay.

If a developer implemented a custom connector by using the Acumatica Commerce Framework, the developer can update this connector to use the same approach for handling the 429 Too Many Requests response code. To use this approach, the developer needs to derive the REST API client implementation from the PX.Commerce.Core.REST.RetryCapableRESTClientBase abstract class and override its methods. The RetryCapableRESTClientBase class uses the Polly.Core.dll library.

The following code shows a sample fragment of the REST API client implementation for the BigCommerce connector.

```
public abstract class BCRestClientBase :
   RetryCapableRESTClientBase<BCRestClientBase.HttpCallContext>
   protected override ValueTask<bool> IsFailure(Outcome<HttpCallContext> result,
       int attemptNumber, int attempts) =>
        new((result.Exception is not null
            || (int)result.Result.Response.StatusCode is 429)
            && attempts >= attemptNumber);
    protected override ValueTask HandleError(HttpCallContext ctx,
       int attemptNumber, int attempts)
    {
       if (attempts == attemptNumber)
            throw new PXException (BCMessages.RetryLimitIsExceeded);
        return new ValueTask();
    }
    protected override ValueTask<TimeSpan ?> GetDelay(HttpCallContext context,
       int attemptNumber)
    {
        if (context is null)
            return new(TimeSpan.FromSeconds(attemptNumber + 1));
        var response = context.Response;
        if ((int)response.StatusCode == 429)
        {
            if ((response.Headers.TryGetValues(
                BigCommerceConstants.Headers.RateLimitResetMs, out var values)
                || response.Headers.TryGetValues(
                    BigCommerceConstants.Headers.RateLimitWindowMs, out values))
                && int.TryParse(values.FirstOrDefault(), out var delay))
                    return new ValueTask<TimeSpan?>(TimeSpan.FromMilliseconds(delay));
            return new ValueTask<TimeSpan?>(TimeSpan.FromSeconds(attemptNumber + 1));
```

{

```
return new ValueTask<TimeSpan?>((TimeSpan?)null);
}
```

For more information about the implementation of a custom connector, see *Implementing a Connector for an External System*.

# Platform API: Changes to the Image Processor Modules of the Shopify and BigCommerce Connectors

In previous versions of Acumatica ERP, the image processor modules of the Shopify and BigCommerce connectors retrieved the image details for the *Product Image* entity by using the *BC-ItemImages* generic inquiry. In some cases, this implementation led to a timeout error on the *Sync History* (BC301000) and *Prepare Data* (BC501000) forms.

In Acumatica ERP 2025 R1, this behavior has been modified. Now the image processor modules of the Shopify and BigCommerce connectors retrieve the image details for the *Product Image* entity by using a BQL query. As a result, the *BC-ItemImages* generic inquiry has been removed from the code base.

### Updating Customizations That Depend on the BC-ItemImages Generic Inquiry

Because the *BC-ItemImages* generic inquiry has been removed from the code base, developers must update their customization projects if they previously customized the *BC-ItemImages* generic inquiry. To customize the BQL query that now replaces the *BC-ItemImages* generic inquiry, a developer must implement the PX.Commerce.Objects.IImageDataProvider interface and all of its methods.

The IImageDataProvider interface consists of the following methods:

- FetchCommand PrepareCommand(List<BCSyncStatus> ids, TGraph processorGraph): This method specifies a base BQL query to fetch the image details for the *Product Image* entity. Developers can specify additional conditions for this BQL query in the following SelectByIds and Select methods.
- IEnuemrable<ItemImageDetails> SelectByIds (List<BCSyncStatus> ids, TGraph processorGraph): This method, which specifies a list of sync IDs, is called during the syncing process on the Sync History (BC301000) and Process Data (BC501500) forms. This method fetches the image details for the Product Image entity by calling the PrepareCommand method.
- IEnuemrable<ItemImageDetails> Select (TGraph processorGraph): This method does not specify any sync IDs and is called from the *Prepare Data* (BC501000) form. The method fetches the image details for the *Product Image* entity by calling the PrepareCommand method.

A developer can specify a custom BQL query that fetches the image details for the *Product Image* entity in their implementation of the FetchCommand PrepareCommand(List<BCSyncStatus> ids, TGraph processorGraph) method. The following code shows an example.

```
public override FetchCommand PrepareCommand(List<BCSyncStatus> ids,
                                                       BCImageProcessor processorGraph)
{
    // Define the custom BQL query in the following line
    BqlCommand baseQuery = ...;
    var prepareMode = processorGraph.Operation.PrepareMode;
    var connectorType = processorGraph.Operation.ConnectorType;
    var bindingId = processorGraph.Operation.Binding;
    List<object> parameters = new() {
        connectorType, bindingId, BCEntitiesAttribute.ProductImage,
        connectorType, bindingId,
        BCEntitiesAttribute.Variant,
        connectorType, bindingId,
       BCSyncStatusAttribute.Synchronized,
       BCSyncStatusAttribute.Synchronized
      };
    return AddFilterConditions(ids, processorGraph, baseQuery, parameters);
}
```

# Platform API: Changes to the Methods of the ARPaymentEntry Graph

In previous versions of Acumatica ERP, when a developer wanted to customize the

PX.Objects.AR.ARPaymentEntry graph by modifying the behavior of its methods, the developer had to copy a large amount of code from the original graph. This process was necessary even for implementing simple customizations, such as implementing a filter to include only the documents that have a particular status. The following methods belong to the ARPaymentEntry graph, whose behavior was difficult to modify:

- public static int GetCustDocsCount(LoadOptions opts, ARPayment currentARPayment, ARSetup currentARSetup, PXGraph currentGraph)
- public static PXResultset<ARInvoice> GetCustDocs(LoadOptions opts, ARPayment currentARPayment, ARSetup currentARSetup, PXGraph currentGraph)

Since these methods were declared as public static, it was not possible to override them. In Acumatica ERP 2025 R1, these methods have been moved to the new PX.Objects.AR.CustomerDocsExtensionBase abstract graph extension and their method signatures have been modified as follows:

- public virtual int GetCustDocsCount(LoadOptions opts, ARPayment currentARPayment, ARSetup currentARSetup)
- public virtual PXResultset<ARInvoice> GetCustDocs(LoadOptions opts, ARPayment currentARPayment, ARSetup currentARSetup)

Because the methods above are now declared as public virtual and have been moved to an abstract graph extension, a developer can simply override these methods to modify their behavior. For details about the code changes in this release, see the Reference List of Changes.

### Overriding the GetCustDocsCount and GetCustDocs Methods

i

To override the GetCustDocsCount and GetCustDocs methods, the developer must declare a second-level graph extension that is derived from the ARPaymentEntryCustomerDocsExtension graph extension, as shown in the following code example.

The ARPaymentEntryCustomerDocsExtension graph extension in the code example above is derived from the new CustomerDocsExtensionBase abstract graph extension, which was mentioned in the preceding section.

## Web Services: New PATCH Method in the REST API

In previous versions of Acumatica ERP, to update a record by using the REST API, a developer had to use the PUT HTTP method. In Acumatica ERP 2025 R1, the developer can use the new PATCH method to update only particular fields of an existing record.

### **Behavior of the PUT and PATCH Methods**

The PUT method updates the fields as follows:

- 1. To find the fields to update, the system compares the values specified in the request body with the field values for the record in the system.
- 2. The system skips the values in the request body that are equal to the field values in the system.
- 3. The system updates only the fields for which the value specified in the request body differs from the value stored in the system.

However, during this update, other fields of the record may be changed because of the logic implemented in the respective graph. Meanwhile, the request body may include values specified for the fields that have been updated because of the graph logic. In this case, the system does not save the values specified in the request body.

The PATCH method updates exactly the fields specified in the request body, regardless of the values for these fields that are stored in the system. However, the PATCH method does not override the graph logic. For example, if because of the graph logic, the value cannot be changed as the request body specifies, this value will not be changed.

### Use of the PATCH Method

A developer may consider using the PATCH method during the synchronization of records from an external system when the developer knows exactly which fields have been changed in the external system. The developer may also use this method in situations when particular fields of a record cannot be updated with a PUT request (as described in the previous section).

In a request with the PATCH method, the developer needs to identify the record and specify only the fields that should be updated. The developer can identify the record by key fields, by ID, or by filtering conditions. For details about the PATCH method, see *Update Particular Fields of a Record*.

### Example

Suppose that the developer needs to update the order quantity and discount amount in a detail line of the 000029 sales order. The developer can use the following request.

```
"OrderQty": { "value": 2 },

"DiscountAmount": { "value": 5 }

}

]

}
```

## Web Services: Tracking of Deleted Records Through OData

The optimal way to synchronize data between Acumatica ERP and an external system is to synchronize only the data that was modified since the previous synchronization. To track the modification date, a developer can use the values in the LastModifiedDateTime field of a record. However, this type of synchronization does not take into account records that were deleted since the last synchronization. Therefore, to synchronize deleted records, the developer should do one of the following:

- Perform the synchronization of all records (which may cause performance issues)
- Use push notifications (which requires additional development)

Acumatica ERP 2025 R1 introduces a new mechanism that can be used to retrieve the list of records of a particular type that were deleted since the last synchronization. The developer can retrieve this list through DAC-based OData.

### **Configuring the Tracking of Deleted Records**

On the new *Tables to Track Deleted Records* (SM207010) form, a developer adds the data access classes (DACs) for which the system should track deleted records. By default, the system does not track deleted records for a DAC. If a record of a DAC listed on the form is removed, the system saves the NoteID of the record and the date and time of the removal.

The developer can also configure how long the information about deleted records is stored. By default, the information about a deleted record is stored for 10 days.

The new form is shown in the following screenshot.

Tables to Track Deleted Records						ds		D NOTES	FILES	CUSTOMIZATION	TOOLS .
Q	8	\$	+	×	ы	$\left \mathbf{X}\right $	Ŧ				
Da	iys to K	eep Rec	ords:				10				
B • Tal	ale							Descrip	tion	Added On	
< <u>PX</u>	< PX Objects SO SOOrder				Repres	ents sales	order 1/14/2025	i			

Figure: The new form

### **Obtaining the List of Deleted Records**

To obtain the list of deleted records of a particular DAC, the developer can use the following OData request.

```
GET https://<Acumatica ERP instance URL>/t/<TenantName>/api/odata/dac/<DACName>/px.GetDeletedRecords()
```

The developer can also filter the records by the date of removal by using the DeleteDate field in the *\$filter* parameter.

For example, suppose that the developer needs to retrieve the list of sales orders that have been removed since November 1, 2024, from the *U100* tenant of the local Acumatica ERP instance. Further suppose that the SOOrder DAC has been added to the list on the *Tables to Track Deleted Records* (SM207010) form. The developer can execute the following request to obtain the list of deleted records.

```
GET https://localhost/AcumaticaERP/t/U100/api/odata/dac/SOOrder/px.GetDeletedRecords()?
$filter=DeleteDate ge 2024-11-01T00:00:00Z
```

A user can obtain the list of deleted records of a DAC by using this request if the user has access to this DAC through DAC-based OData.

## Including the Tracking of Deleted Records in a Customization Project

The developer can include in a customization project the list of DACs for which the system tracks the deleted records. To include this list in a customization project, the developer uses the *Tables to Track Deleted Records* page of the Customization Project Editor, which is shown in the following screenshot. Any of the DACs that are listed on the *Tables to Track Deleted Records* (SM207010) form can be included in the customization project.

Customization Project Ed	itor		Back Reload
File Publish Extension Library	Source Control		
TrackingDeletedRecords .	Tables to Track Deleted Records		i i
Access Rights .	O 🗉 🕫 X + MANAGE TABLES		
Web Service Endpoints	B Object Name Description	Last Modified By L	ast Modified On
Analytical Reports Push Notifications Business Events	PX Objects S0 S00/der	Kinberly Gibbs 1	/14/2025
Mobile Application User-Defined Fields Webhooks Connected Applications			
Tables to Track Deleted Records (1)			

Figure: The new page

## Web Services: New Manufacturing Endpoint

Acumatica ERP 2025 R1 provides the new *MANUFACTURING/25.100.001* endpoint. A developer can review this endpoint and obtain its OpenAPI specification on the *Web Service Endpoints* (SM207060) form, which is shown in the following screenshot.

MANUFACTURING 25.100.0	001	POOLT			CUSTOMIZATION	TOOLS +
Codport Name: MANUER     Handlinf g	EXTERIO EN	Endport Venion	25 100 001	p		
ENDPOINT     APSMarchenance     DisOMatenal     DisOMatenal     DisOMatenal     DonAthoutes     DonPreferences     CostPostactor/Drders     CostPostactor/Drders     Configurator/Freferences     CostPostactor/Preferences     CostPostActor/Preferences     CostPostActor/Preferences     CostPostActor/Preferences     CostPostActor/Preferences     CostPostPostActor/Preferences     CostPostPostPostPostPostPostPostPostPostP	Endpoint Name     Endpoint Versilin     Syntem Contract	MANUFACTURING 25.100.001 4	Bese Endo Seie Endo	ont Name		

### Figure: The new endpoint

The endpoint includes the new ProductionOrderDatesProcess entity. The developer can use this entity to update dates in released production orders and operations in a single request. (If the developer uses the ProductionOrder entity to update dates, they need to perform three API requests to update the dates in one production order.)

By using the new endpoint, the developer can also obtain the scheduling details of production orders through the following new fields:

- ProductionOrderDetail.EndDate
- ProductionOrderDetail.SchedulingMethod
- ProductionOrderDetail.StartDate
- OrderOperationDetail.EndDate
- OrderOperationDetail.StartDate

## Workflow UI: Viewing of Workflow Changes

In previous versions of Acumatica ERP, a customizer had to open the *Workflows* page of the Customization Project editor for each customization project to learn whether a workflow for a particular form has been modified or whether a custom workflow has been created for this form.

In Acumatica ERP 2025 R1, a customizer can view the list of forms with modified workflows for all published customization projects, without the need to open the Customization Project Editor and investigate each customized screen. Also, from any form, a customizer can determine whether it has workflow modifications.

### Forms with Workflow Modifications

A customizer can now view all forms with modified workflows within Acumatica ERP. Suppose that a customizer plans to work with an Acumatica ERP instance and wants to know which forms have modified workflows. Further suppose that in the instance, three customization projects have been published, each affecting one form. These customization projects have modified the respective forms as follows.

Form	Modification
<i>Task</i> (CR306020)	A custom workflow has been created. (In an out-of-the-box system, this form does not have any workflow.)
Opportunities (CR304000)	An inherited workflow has been modified.
<i>Cases</i> (CR306000)	The form's layout has been customized. (The changes do not affect the form's workflow.)

On the *Customization Projects* (SM204505) form of Acumatica ERP, the customizer can learn which forms have modified workflows. To do this, the customizer clicks the new **Screens with Custom Workflow** command on the More menu (under the new **Customization Info** category), as shown in the following screenshot.

Customization Projects				OVETOMIZA	100K 100LB +
0 . n + x	UNPUBLISHALL				4
B C D II Hermand > S D II Hermand S D D R S D II R S D II R	Propriet Name Constitution Description Textstantion	Laur Schrift für GRIMORI GRIMORI GRIMORI	Publish Unpublish All Unpublish All Import Import Amples Ingelegend Project C . Export Export	Customization Info View Published XAA. Screene ante Custore Verenhou Validations Validations Validations Validations DAC Fired Types (Fundame Valid, DAC Attributes (Fundame Valid, Lauroup Definitions (Floriteme Valid,	8

Figure: The new Screens with Custom Workflow command

This opens the **Screens with Custom Workflow** dialog box, which lists the forms whose workflows have been modified, as shown in the following screenshot. Notice that the dialog box contains only two forms: *Task* and *Opportunities*.

Customization Projects 60							
0 = 0	+ ×		Screens with Custom Workflow	Ξ×			
		*Project fo Canesilies Cesserbeit Jastitturs	C H 80	After has here stated in withd by using Workflow St. Science Neine Opportunities Test		er Hantled for 19342034 19342034 19342034	
					GLOSE		

Figure: The Screens with Custom Workflow dialog box

While working with a particular form, the customizer can see if any changes have been made to its workflow by clicking **Tools** on the form title bar. If the workflow has been customized, the system displays the Flow icon to the left of the screen ID, as shown in the following screenshot.

000014 - Sale of co	mmercial juicer to Italian Co + 🗘 - 📋 K	mpany	N OPEN CRE	Ate quote		⊇ works	FILES CUSTOMERION 2003.5 +
Caparturity ID Brains + Class ID Blapt + Estimated Close Date	000014 New PRODUCT - Poduct Sales Prospect	р р /	Business Actuant Location Contact Denser	ITACOM - Italian Company MAXN - Primary Location Dustin Lindquist	р р р	111	Held Service           al To:         DAC Incleme Browser           Dat         Notifications.           ana         Business Events.           TMI         Switch to Modern Lit
Consequent     ACTIVITIES     DETAIL     OF OREATE TARK	Audt Hatury Access Rights Bhere Column Configuration Toace						
	Type *Summary			Bates 5	arthe .	Compl	About About

Figure: The Flow icon for the modified workflow

### Other Change to the Customization Projects Form

On the *Customization Projects* (SM204505) form, the **Unpublish All** button on the form toolbar (and the corresponding command on the More menu) is now always available, regardless of whether any customization projects have been published.

## **Fixes and Enhancements**

You can find fixes and minor enhancements introduced in Acumatica ERP 2025 R1 in the following document: *Acumatica ERP 2025 R1 Release Notes: Fixes and Enhancements*.