

Release Notes 2026 R1

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Introduction

Welcome to the Acumatica ERP 2026 R1 Release Notes.

Thanks for checking out what's new in Acumatica ERP! These release notes highlight the latest improvements—from new capabilities to enhancements that ease your work.

Whether you're configuring the system, using it day to day, customizing it, or supporting others, this guidance will help you get the most out of this release.

Your role	How to use these release notes
Administrator	Review the full notes to understand what's changed, what needs to be set up, and how your organization can benefit. Be sure to check out the topics with the <i>System Administration</i> and <i>Platform</i> prefixes.
Acumatica ERP user	Browse the highlights to find enhancements that affect your work. Then zoom in on the ones that will help you work faster, smarter, or more efficiently.
Developer or customizer	Head over to the Release Notes for Developers for technical changes, updates, and other enhancements that support your custom solutions.
Partner or Acumatica employee	Explore the full list of improvements to get up to speed on what's new—and ready to share how Acumatica continues to deliver value.

Installation and Upgrade Notes

Before upgrading to Acumatica ERP 2026 R1, be sure to **back up all configuration files and databases** used by your application instances. This step is essential to avoid data loss. For complete instructions, see [Upgrading of Acumatica ERP: General Information](#).

This release **includes significant changes** from Acumatica ERP 2025 R2 that **may affect customizations and integrations**. If your team has modified the system or connected it to other applications, see [Release Notes for Developers](#) for details.

If your Acumatica ERP instance is integrated with software from an independent software vendor (ISV) partner, check with this partner to **confirm compatibility** with Acumatica ERP 2026 R1.

Deprecation of the Classic UI

Acumatica ERP 2026 R1 is the last version that supports the Classic UI. Starting in Acumatica ERP 2026 R2, it will no longer be possible to switch your instance to the Classic UI.

Using Supported Web Browsers for Workstations

You can find the supported web browsers for Acumatica ERP 2026 R1 in the following table.



Web browsers on mobile devices are not supported. For the best experience on phones and tablets, use the Acumatica mobile app. Microsoft Internet Explorer is not supported.

Web Browser	Version
<i>Microsoft Edge</i>	120 or later
<i>Mozilla Firefox</i>	130 or later
<i>Apple Safari</i>	17 or later
<i>Google Chrome</i>	143 or later

Learn more in [System Requirements for the Acumatica ERP Installation](#).

Switching to the Acumatica ERP Payments Plug-In

The Authorize.Net plug-in is no longer supported starting from Acumatica ERP 2025 R1 and has been removed from the system. We recommend switching to the Acumatica Payments plug-in, which provides greater functionality, better support, and competitive rates.

To explore this option, work with your partner to create a presales support case.



If your company has customer credit cards stored in the Authorized.Net gateway, this data will be lost after the upgrade. Contact your partner for help with migrating tokenized data.

If your company is using Acumatica ERP 2023 R2 or later, you can configure the Acumatica Payments plug-in without making any software changes. To learn more, see [Configuring and Using Acumatica Payments](#) and [To Configure Acumatica Payments](#).

Migrating Pivot Tables from Classic UI to Modern UI

In Acumatica ERP 2025 R2, the pivot table representation of generic inquiries has undergone a significant redesign, showcasing a modern, streamlined interface.

Your existing standalone and filter tab pivot tables will migrate to Modern UI pivot views as follows:

- Standalone pivot tables and pivot tables saved as tabs will become views of the related generic inquiry form.
- Filter conditions from the filter tab pivot tables will become regular filters.
- Shared pivot tables will be converted to shared views.
- Filter conditions from the shared filter tab pivot tables will become shared filters.
- Pivot tables with the **Default** option selected will retain this setting unless another Modern UI pivot view already has the **Default** option selected.



The *Pivot Tables* (SM208010) form will be deprecated in Acumatica ERP 2026 R2. To create and view a pivot table, use the View List drop-down menu of the inquiry form that serves as the data source for this table.

Updating Deprecated Software

Starting in Acumatica ERP 2026 R1, the system no longer supports the following versions of third-party software. To make sure your system runs smoothly and securely, review these changes and update any outdated components as needed.

Software	Version
Windows Server	2016 64-bit edition
Microsoft SQL Server	<ul style="list-style-type: none"> • 2016 Service Pack 1 • 2017
MySQL Community Server	5.7

See [System Requirements for the Acumatica ERP Installation](#) to learn more about the current requirements.

Migrating Schedules for Sending Reports

The report scheduling functionality has been enhanced (for details, see [Email Templates](#) and [Report Form](#)). Acumatica is rolling out the changes to report scheduling in stages:

- Version 2025 R1: Introduction of the report migration functionality and removal of the **Schedule Template** button from the report form toolbar
- Version 2026 R1: Removal of the *Send Reports* (SM205060) form
- Version 2026 R2: Deprecation of the report migration functionality, including the removal of the **Migrate** command from the *Automation Schedules* (SM205020) form

Optional: Preparing for the Manufacturing Upgrade

We recommend completing or closing production orders before upgrading to Acumatica ERP 2026 R1. Open production orders may show **minor cost differences** after the upgrade because costs are now calculated to the second, whereas they were previously calculated using whole minutes.

Preparing for the Upgrade

On the [Apply Updates](#) (SM203510) form, you can apply only minor updates for the currently installed version. To upgrade from a previous major version to Version 2026 R1, you'll need to perform the upgrade manually on the server.

Upgrading through the web interface is not supported. Customizations in your instance may be incompatible with Version 2026 R1, so manual installation ensures that any conflicts can be handled properly.

Before you install the new version or upgrade to it locally, do the following on the server where the upgraded Acumatica ERP instance will be installed:

1. Switch the Internet Information Services application pool to Integrated mode. (Classic mode is not supported.)
2. Install Microsoft .NET Framework 4.8.

Performing the Upgrade

The upgrade process depends on the version you're upgrading from. Use the paths below to determine the correct steps.

From Version	Upgrade Path
2025 R2	You can perform a direct upgrade.
2025 R1	You can perform a direct upgrade.
2024 R2	You can perform a direct upgrade.
2024 R1	You must perform an incremental upgrade: <ol style="list-style-type: none"> 1. Upgrade to the latest available build of Version 2024 R2. 2. Upgrade to Version 2026 R1.
2023 R2	You must perform an incremental upgrade: <ol style="list-style-type: none"> 1. Upgrade to the latest available build of Version 2024 R2. 2. Upgrade to Version 2026 R1.

You can upgrade from any build of the following versions:

- 2025 R2
- 2025 R1
- 2024 R2

You must install the latest patch for 2026 R1 after the upgrade. This will preserve the fixes and enhancements in your current build. For more information on how to install the patches, see [Acumatica ERP PatchTool: General Information](#).

Fixes and Enhancements

Acumatica ERP 2026 R1 also provides fixes and minor enhancements, as described in [Acumatica ERP 2026 R1 Release Notes: Fixes and Enhancements](#).

Actions Before Upgrade

Before performing the upgrade to Acumatica ERP 2026 R1, you should perform the actions described in the following sections.

Platform

In 2026 R1, the *Send Reports (SM205060)* form has been removed. If you had any automation schedules configured on this form, you need to migrate them as described in [this knowledge base article](#). Schedules that weren't migrated will stop working after the upgrade.

Post-Upgrade Changes and Actions

After you upgrade to Acumatica ERP 2026 R1, certain system settings will be updated automatically; you may also need to perform some actions. The following sections describe the key changes and actions in each area.

Inventory and Order Management

After the upgrade, the system doesn't remove existing sales invoices with the *Credit Hold* status from hold automatically. You must remove these invoices from hold manually on one of the following forms:

- [Invoices](#) (SO303000)
- [Process Invoices and Memos](#) (SO505000)

For details, see [Inventory and Order Management: Enhanced Logic for Sales Workflow](#).

You need to recalculate the item availability data to update the display of quantities and amounts for existing released adjustments on the following reports and inquiry form:

- [Historical Inventory Balance](#) (IN616000) report
- [Historical Inventory Valuation](#) (IN617000) report
- [Inventory Transaction Summary](#) (IN406000) form

Do the following on the [Recalculate Inventory](#) (IN505000) form:

1. Select a warehouse.
2. Select the **Rebuild Item History Since** check box.
3. To the right of the check box, select the financial period in which the display of quantities will be updated.
4. Click **Process**.

For details, see [Inventory and Order Management: Greater Accuracy and Visibility in Inventory Reports](#).

You may have confirmed shipments whose **Pacejet Status** is *Workbench Processing* on the [Shipments](#) (SO302000) form. After these shipments are processed at the Pacejet workbench, you can complete their processing in Acumatica ERP by selecting *Update Shipment with Pacejet Data* on the [Shipments](#) or [Process Shipments](#) (SO503000) form.

However, if you want to process these shipments using the new workflow, do the following for each of them:

- Open the [Shipments](#) form,
- Click the **Correct Shipment** command on the More menu.

In Acumatica ERP, the system assigns the *Open* status to the shipment and changes the **Pacejet Status** to *Not Submitted*. Additionally, it sends an API request to Pacejet, and the carrier service deletes the shipment in their system.

Now you can process the shipment using the new workflow.

For details, see [Inventory and Order Management: Reworked Shipping with Pacejet](#).

Integrations

If you used eSign integration through the legacy customization project in Acumatica ERP:

- During the upgrade, the existing signing account records are automatically moved from the *eSign Accounts (ES301000)* custom form to the predefined *eSign Accounts (ES301000)* form.
- Previously created esignature requests and recipients remain in your system after the upgrade.
- For the DocuSign provider, the account is disconnected during the upgrade. After the upgrade, you need to update the connection.

For details, see [Integrations: Electronic Document Signing](#).

If you used the *PDF Annotator* customization package previously, your existing client ID, which is specified on the legacy *Adobe Preferences* form, won't be migrated automatically. After the upgrade, you must:

1. Obtain a new client ID from Adobe.
2. Enable the *PDF Annotator Integration* feature on the [Enable/Disable Features](#) (CS100000) form.
3. Create an external application with the *PDF Annotator Embed Key* type and your new client ID on the [External Applications](#) (SM301000) form.

For details, see [Integrations: Annotate PDF Attachments](#).

Manufacturing

After the upgrade, **integrations and customizations** that pass or expect time values as total minutes must be updated to handle **total seconds** instead. This includes direct use of raw time fields and calls made through manufacturing endpoints involving time values. You need to do this because all time values in manufacturing are now stored and processed in seconds.

For details, see [Manufacturing: Accurate Time Tracking for High-Speed Production](#).

Projects and Construction

After the upgrade, you can use the predefined rules on the [Revenue Percentage Calculation Rules](#) (PM206500) form. The **Revenue Percentage Calculation Rule** box remains empty in existing projects, project templates, project tasks, project template tasks, and common tasks. For details, see [Projects and Construction: Automated Revenue Percentage Calculation for Progress Billing](#).

If at least one tag (excluding **All Tags** and **Untagged**) was created on the *Configure Tags* (SM202560) form, the system does the following:

- On the [Project Tag Templates](#) (PM204500) form, creates a tag template with these settings:
 - **Template ID:** *DEFAULT*
 - **Description:** *Default project tag template*
 - **Active:** *Selected*
- On the **Document Tag Setup** tab of the [Projects](#) (PM301000) form, inserts this template in the **Tag Template** box for all projects.

For details, see [Projects and Construction: Optimized Project Document Management](#).

Existing change orders will have the following tax-related settings on the [Change Orders](#) (PM308000) form:

- **Revenue Budget Tax Total:** *0*
- **Revenue Budget Change Total:** *Unchanged*
- **Revenue Budget Change Amount:** Equal to the **Revenue Budget Change Total** until you calculate taxes
- **Tax Zone:** *Empty*
- **Tax Category:** *Empty* for existing revenue budget lines
- **Retained Taxable Amount** and **Retained Tax:** *0*

To apply taxes to an existing change order, select the tax zone on the **Taxes** tab, select the tax category on the **Revenue Budget** tab, and save your changes. For details, see [Projects and Construction: Tax Calculation in Change Orders](#).

Time and Expenses

After the upgrade, the system handles the time frequency settings as follows:

- The **First Day of Week** box on the [Time and Expenses Preferences](#) (EP101000) form: If an option was specified before the upgrade, it is preserved. If the box was empty, the system inserts *Sunday*.
- The **Custom Week Configuration** check box on the [Time and Expenses Preferences](#) form: The previous state of the check box is preserved.
- The **Time Card Frequency** box on the [Employees](#) (EP203000) form: For all existing employees, the system inserts *Weekly*.
- The **Frequency** box on the [Employee Time Cards](#) (EP305000): For all existing time cards, the system inserts *Weekly*.
- The **Start Date** and **End Date** boxes on the [Employee Time Cards](#) form: For all time cards with custom weeks, the start and end dates match the first and last day of the corresponding custom week. For all other time cards, the system calculates the dates by using the settings on the [Time and Expenses Preferences](#) form.
- The **Frequency** box on the [Employee Time Activities](#) (EP307000) form: For all existing time activities, the system inserts *Weekly*.

AI Assistant: Leveraging the AI Assistant

Acumatica ERP 2026 R1 introduces the *AI Assistant*—a chat window inside Acumatica ERP where you can ask questions in plain language and quickly explore your data. Instead of checking multiple forms and reports to find answers, you can get answers immediately and act on them with just a click.

The AI Assistant can return answers as text summaries, tables, lists, charts, and pivot tables. You can jump directly to the relevant forms and records from the response.

To maximize the accuracy and relevance of the answers, you control which generic inquiries the AI assistant uses and how those inquiries are described in business language that's familiar in your company.



These capabilities are available only if the *AI Assistant* feature is enabled on the [Enable/Disable Features](#) (CS100000) form. This feature is subject to licensing; please consult the Acumatica ERP sales policy for details.

Working with this new tool is easy and straightforward. Read on to learn how you can leverage it.

What You Can Do with the AI Assistant

If you're a user of the AI assistant, you can:

- **Ask questions in everyday language:** You can type a question using language you'd use with colleagues, such as *What is this month's total income?* or *List 10 open invoices that were modified most recently.*
- **Drill down into records with just a click:** If an answer includes the record ID or name, this ID or name is displayed as a link. Clicking the link opens the record in the main working area of the form—not in the chat window.
- **Turn insights into dashboards and pivots:** For certain answers, the AI Assistant offers to perform actions for you, such as creating a widget from a chart or generating a pivot table and placing it on a new dashboard. These actions also occur in the working area of the form, so you can build tools for further analytics straight from your conversation.
- **Keep related questions together:** Conversations are grouped into chats. Each chat stores your previous questions and answers—so you can return to your research later or build on it.

If you're a system administrator, you can:

- **Control which data the AI Assistant uses:** Select the generic inquiries the AI Assistant should use; you can add or remove generic inquiries at any time. Only generic inquiries marked for AI use are used to answer your questions.
- **Describe data in business language:** Add short descriptions for specific fields and parameters and for the whole generic inquiry. These descriptions complement the technical structure and help the AI Assistant interpret questions more accurately.
- **Monitor license usage:** Track how many tokens you have used.

Review Your Sources


Behind the scenes, the AI Assistant relies on a defined set of generic inquiries and their descriptions. You can add more generic inquiries to this set or remove them from it. By default, the most popular generic inquiries are used as sources.

Add Generic Inquiries

You can make any generic inquiry available to the AI Assistant by selecting the new **Expose to AI Assistant** check box on the **Interface Options** tab of the [Generic Inquiry](#) (SM208000) form, as shown below.

The screenshot shows the configuration page for a 'Generic Inquiry'. At the top, there are navigation icons and buttons for 'View Inquiry', 'Publish to the UI', and 'Unpublish'. Below this, there are input fields for 'Inquiry Title *' (CR-Campaigns), 'Mode' (Low-Code selected), 'Site Map Title' (Marketing Campaigns), and 'Screen ID' (CR.20.20.PL). A horizontal menu below these fields includes 'DATA SOURCES', 'RELATIONS', 'PARAMETERS', 'CONDITIONS', 'GROUPING', 'INTERFACE OPTIONS' (which is underlined), and a menu icon. Under 'INTERFACE OPTIONS', there are several checkboxes: 'Expose via OData', 'Expose to the Mobile Application', 'Detect Anomalies', and 'Expose to AI Assistant' (which is checked and highlighted with a red border). On the left side, there are input fields for 'Select Top' (0), 'Records per Page' (0), 'Export Top' (0), and 'Attach Notes To' (a dropdown menu). Below these are three more checkboxes: 'Show Deleted Records', 'Show Archived Records', and 'Disable Record Counts and Totals'.

Figure: The Expose to AI Assistant check box

 A generic inquiry must be published to the UI before it can be used by the AI Assistant.

Add Descriptions

To help the AI Assistant understand users' questions and provide better answers, you can add a description for the whole generic inquiry, as well as descriptions for any of its parameters and fields. You can use the rich text editor on the new **Description for AI** tab of the *Generic Inquiry* (SM208000) form to enter a short explanation of what the generic inquiry is for, as shown below.

The screenshot shows the configuration page for a 'Generic Inquiry' with the 'AI DESCRIPTION' tab selected. The top navigation and buttons are the same as in the previous screenshot. The input fields for 'Inquiry Title *' (IN-StockItem), 'Mode' (Low-Code selected), 'Site Map Title' (Stock Items), and 'Screen ID' (IN.20.25.PL) are visible. The horizontal menu now highlights 'AI DESCRIPTION'. Below the menu, there is a rich text editor containing the following text: 'A list of stock items that contains the following data for each item: - An inventory ID, which is a link to the Stock Items (IN202500) form - A short description of the stock item - The type, posting class, and item class - The price and status'. There are undo and redo icons in the top right corner of the text editor area.

Figure: The new Description for AI tab



If your instance has multiple active locales, you can provide localized versions of the descriptions on this tab.

In the new **Description for AI** column on the **Results Grid** tab, add a short text for each data field—that is, column on the resulting inquiry form—where an explanation may be helpful (shown below).

Also, on the **Parameters** tab, you can add an instruction for using each parameter. (For example, for a date, you could enter *Select the date up to which open invoices are included.*)

The screenshot shows the 'Generic Inquiry' interface. At the top, there are navigation buttons like 'View Inquiry', 'Publish to the UI', and 'Unpublish'. Below that, there are input fields for 'Inquiry Title*' (IN-StockItem), 'Mode' (Low-Code selected), 'Site Map Title' (Stock Items), and 'Screen ID' (IN.20.25.PL). The main area is divided into tabs: DATA SOURCES, RELATIONS, PARAMETERS, CONDITIONS, GROUPING, SORT ORDER, RESULTS GRID (selected), and INTERFACE OPTIONS. Below the tabs is a 'Row Style' dropdown and a search bar. The main table has columns: Active, Object, Data Field, Schema Field, Width (px), Style, Visible, Default Navigation, Navigate To, and AI Description. The first row is highlighted and has a red box around the 'AI Description' cell containing the text 'A short description of the stock item'.

Active	Object	Data Field	Schema Field	Width (px)	Style	Visible	Default Navigation	Navigate To	AI Description
<input checked="" type="checkbox"/>	InventoryItem	InventoryCD				<input checked="" type="checkbox"/>	<input type="checkbox"/>	IN202500 - Stock Items	A short description of the stock item
<input checked="" type="checkbox"/>	InventoryItem	Descr				<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	InventoryItem	ItemType				<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	InventoryItem	KitItem				<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	InventoryItem	ItemClassID				<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	InventoryItem	PostClassID				<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	InventoryItem	TaxCategoryID				<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	InventoryItem	LotSerClassID				<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	InventoryItem	ValMethod				<input type="checkbox"/>	<input type="checkbox"/>		

Figure: A field description for the AI Assistant

The descriptions provide extra context that can improve answer quality, but specifying them is optional.

Process the Descriptions

After you expose a generic inquiry to the AI Assistant and add descriptions, you need to process this inquiry on the new *AI Assistant Data Processing (ML503010)* form. You either click **Process All** or select the needed records and click **Process** (Item 1 below). After the system processes the inquiries (Item 2), their data can be used by the AI Assistant.

AI Assistant Data Processing

Process Process All

Clear Cloud Data Before Processing

<input type="checkbox"/>	Data Source	Site Map Title	Status	Last Upload Date
> <input type="checkbox"/>	AR-CustomerDetails	Customer Details	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	DB-StorageDetails	Storage Details	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	IN-NonStock	Non-Stock Items	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	IN-StockItem	Stock Items	Update completed	1/14/2026 7:52 AM
<input type="checkbox"/>	IN-Transfers	Transfers	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	PO-PurchaseOrder	Purchase Orders	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	PO-Receipt	Purchase Receipts	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	SO-BI-SalesProfitabilityYear	Sales Profitability for Last 12 Months	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	SO-SalesOrder	Sales Orders	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	SO-Shipment	Shipments	Update completed	1/19/2026 1:39 PM

Figure: The AI Assistant Data Processing form

If you modify a generic inquiry, its status on the *AI Assistant Data Processing (ML503010)* form changes, indicating that this inquiry should be processed again, as shown below.

AI Assistant Data Processing

Process Process All

Clear Cloud Data Before Processing

<input type="checkbox"/>	Data Source	Site Map Title	Status	Last Upload Date
> <input type="checkbox"/>	AP-Vendors	Vendors	Required for update	
<input type="checkbox"/>	CR-BusinessAccounts2018R1	Business Accounts	Required for update	
<input type="checkbox"/>	CR-Contacts2018R1	Contacts	Required for update	
<input type="checkbox"/>	CR-Leads2018R1	Leads	Required for update	
<input type="checkbox"/>	CR-Opportunities2018R1	Opportunities	Required for update	
<input type="checkbox"/>	IN-StockItem	Stock Items	Required for update	1/14/2026 7:52 AM
<input type="checkbox"/>	AR-CustomerDetails	Customer Details	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	DB-StorageDetails	Storage Details	Update completed	1/19/2026 1:39 PM
<input type="checkbox"/>	IN-NonStock	Non-Stock Items	Update completed	1/19/2026 1:39 PM

Figure: Generic inquiries that should be processed


By default, the system uses the predefined *AI Assistant GI Schema Upload* schedule to process the descriptions. (This schedule runs once a week.) You can also run the process manually.

Use the New Role

To make it easier for you to work with the AI Assistant, the system includes the new *AI Assistant User* role. A user with this new role can open the AI Assistant and chat with it.

Also, users with the *Administrator* and *Acumatica Support* roles can use this functionality.

Ask Your Questions

After you've configured and processed generic inquiries, your AI Assistant is ready to use. To start working with it, click  in the top pane. The chat window opens with the three predefined prompts (shown below). You can click one of these prompts or type your own.

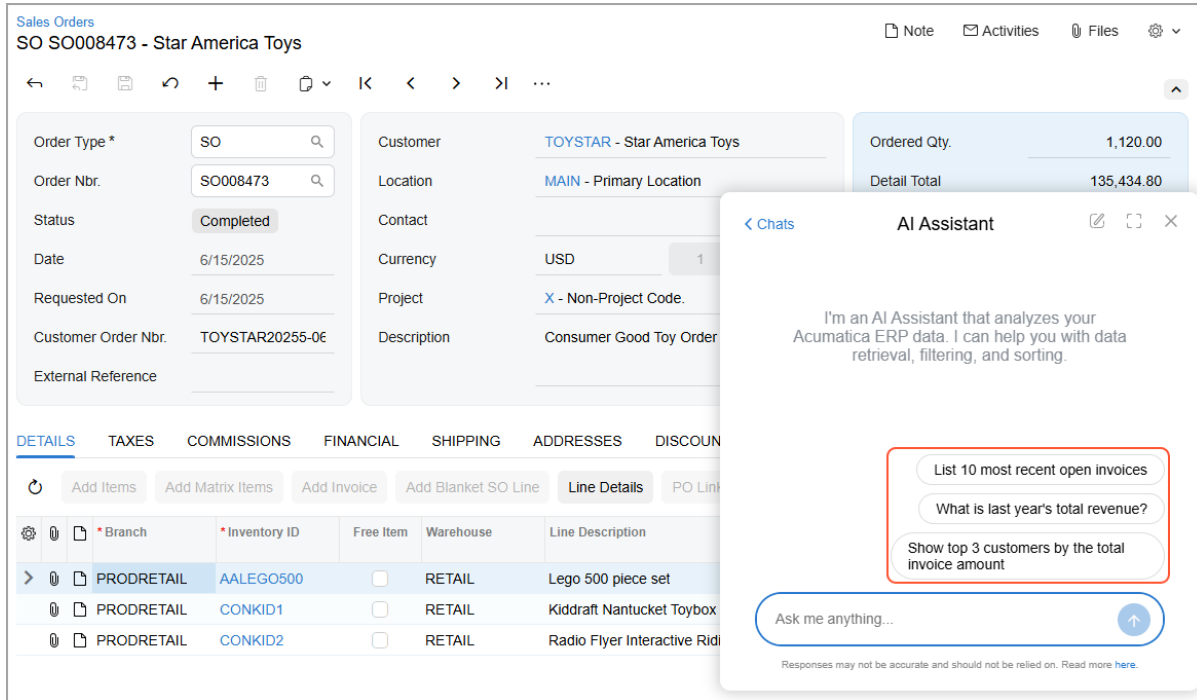


Figure: The default prompts for the AI Assistant

Suppose that you want to see the open invoices. The results that the AI Assistant provides are listed in a table (shown below).

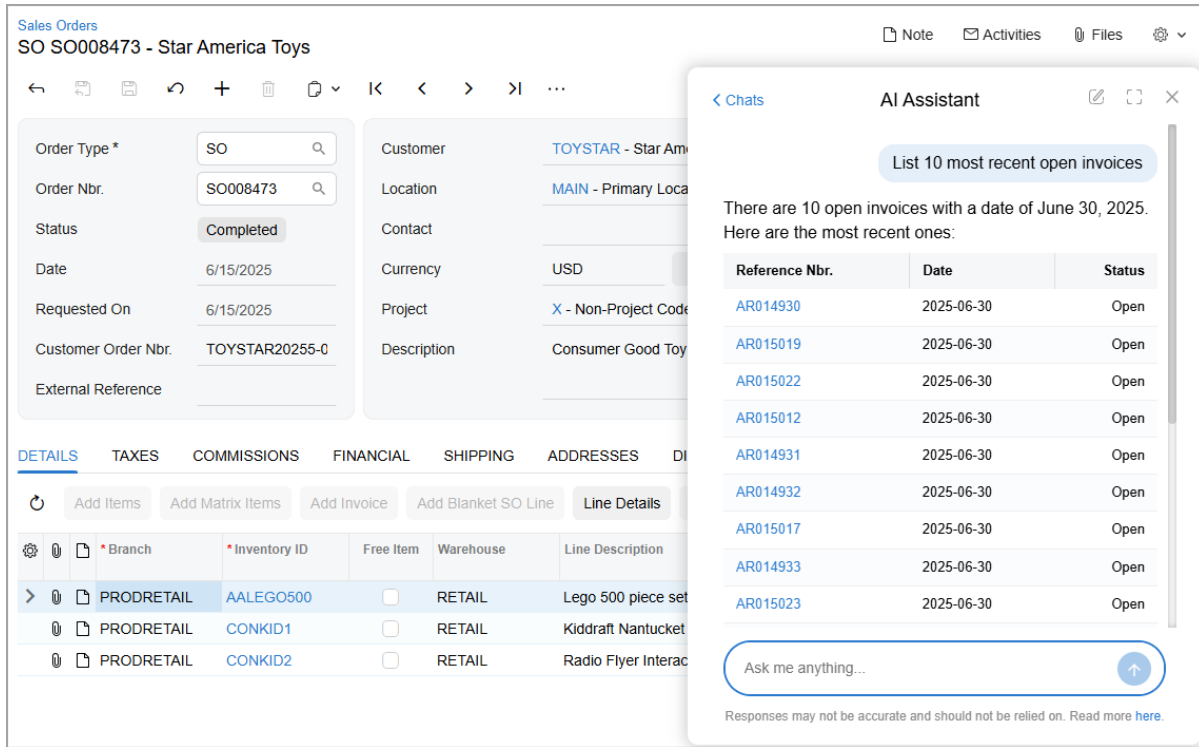


Figure: The table with open invoices

You can click the link with the invoice reference number to open the invoice in the main working area. Alternatively, you can open the list of records created on the *Invoices and Memos* form (Item 1 below) or ask for more details (Item 2).

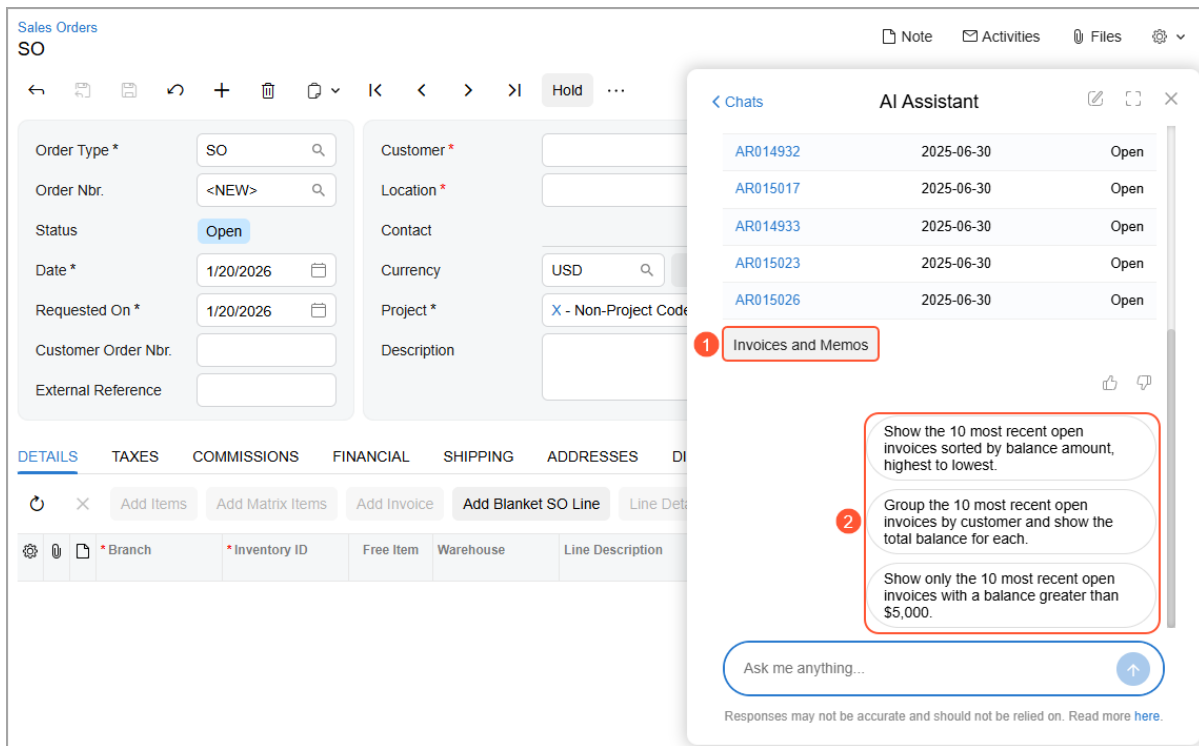

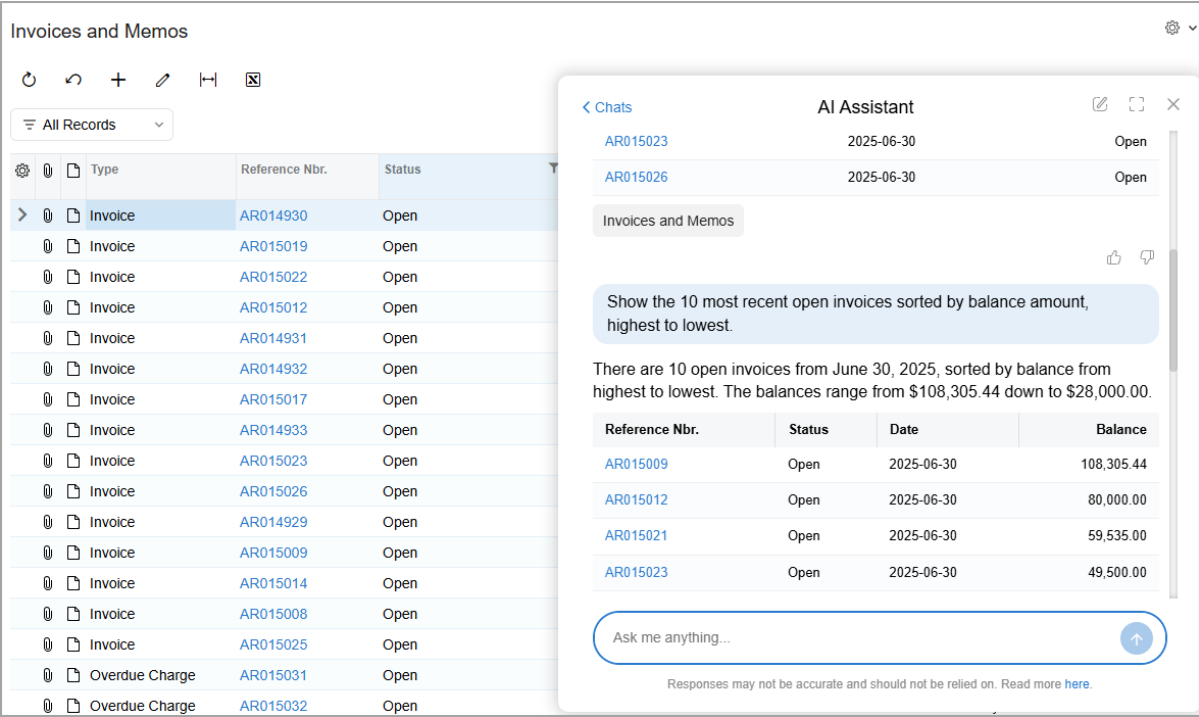


Figure: The list of results and the follow-up prompts

 You can view different forms and records in the main working area while continuing your conversation with the AI Assistant. The AI Assistant doesn't switch between chats when you do this.

Notice that for the first follow-up prompt, the AI Assistant displays the results as text, a table, and a chart (shown in the next two screenshots). The columns in the chart are also links to the corresponding records. You can click **View Chart** to open a dashboard with this widget.



The screenshot shows the 'Invoices and Memos' application interface. On the left, a table lists various records. On the right, an 'AI Assistant' chat window is open, displaying a response to a prompt. The response includes a text summary and a table of the top 10 open invoices by balance.

Reference Nbr.	Status	Date	Balance
AR015009	Open	2025-06-30	108,305.44
AR015012	Open	2025-06-30	80,000.00
AR015021	Open	2025-06-30	59,535.00
AR015023	Open	2025-06-30	49,500.00

Figure: The response for the follow-up prompt

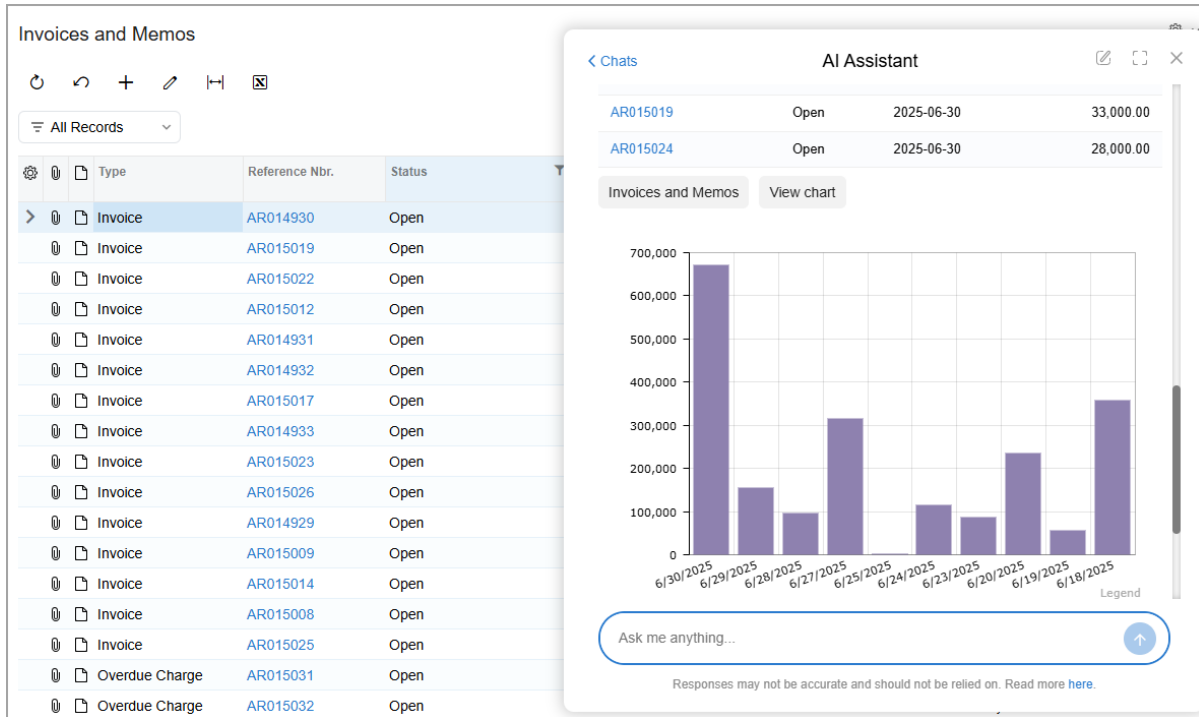


Figure: A chart in the response

The AI Assistant can also organize data into a pivot table (shown below). Click the links in the table to open the corresponding records.

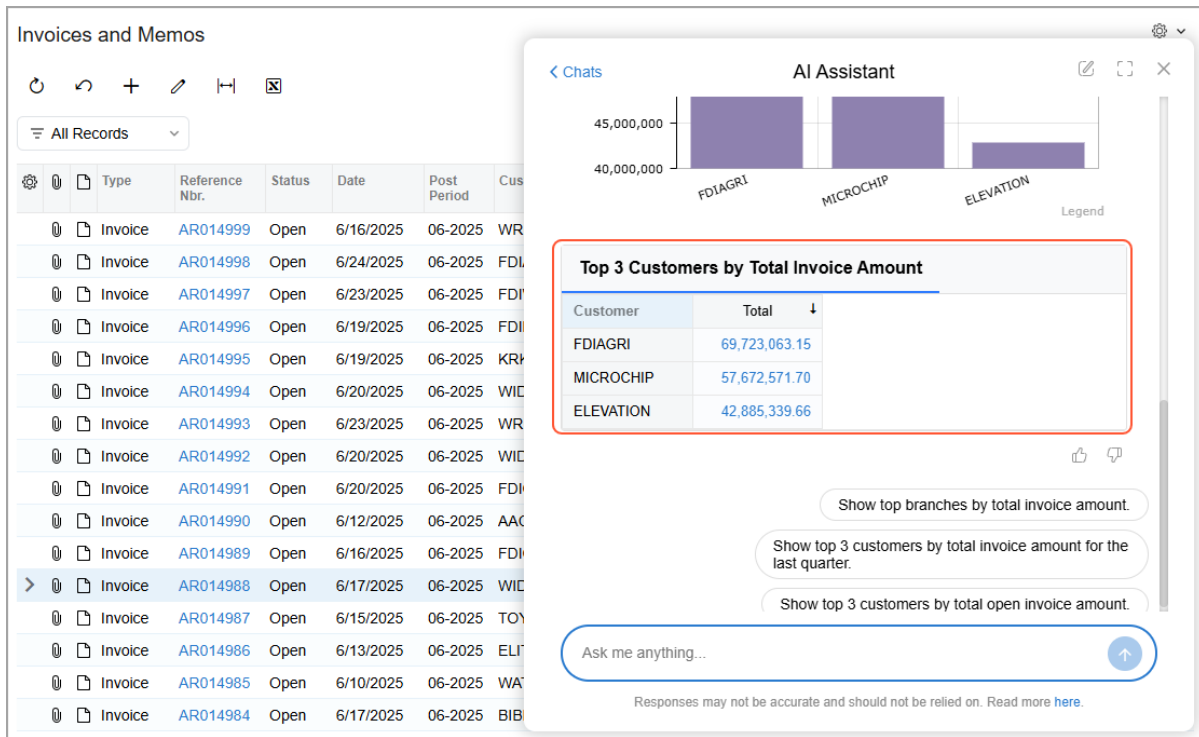


Figure: A response with a pivot table

Manage Your Chats

Each time you click a predefined prompt or type a new one, the AI Assistant creates a chat. You can continue asking questions in this chat or go back to the list of chats, switch to another chat, or start a new one.

To get back to the list of chats, click the *Chats* link in the upper left corner of the window (Item 1 below). From this list, you can click another chat to switch to it. To start a new chat, click *Create Chat* (Item 2).

Type	Reference Nbr.	Status	Date	Post Period	Customer
Credit WO	AR005120	Closed	6/1/2017	06-2017	ABAR...
Invoice	AR015818	Open	1/1/2026	01-2026	ALPHA...
Invoice	AR015815	Open	1/22/2026	01-2026	BEAU...
Invoice	AR015814	Open	1/8/2026	01-2026	ARTC...
Invoice	AR015813	Open	1/28/2026	01-2026	ABCS...
Invoice	AR015812	Closed	11/18/2025	11-2025	ABCS...
Invoice	AR015811	Open	1/31/2026	01-2026	KRKC...
Invoice	AR015810	Open	1/31/2026	01-2026	MARIN...
Invoice	AR015809	Open	1/31/2026	01-2026	VIDEC...
Invoice	AR015808	Open	1/12/2026	01-2026	WEST...
Invoice	AR015807	Open	1/23/2026	01-2026	WIDPA...
Invoice	AR015806	Open	1/31/2026	01-2026	CJOE...
Invoice	AR015805	Open	1/31/2026	01-2026	ELEVA...

Figure: The Chat link and Create Chat link

If you no longer need a chat, you can delete it (Item 1 below). Notice that the system has assigned a name to each chat based on your request (Item 2). Click the *Back* link to return to the previous chat (Item 3).

Type	Reference Nbr.	Status	Date	Post Period	Customer	Customer Name
Credit WO	AR005120	Closed	6/1/2017	06-2017	ABARTENDE	USA Bartendi...
Invoice	AR015030	Open	6/17/2025	06-2025	ABCSTUDIOS	ABC Studios I...
Invoice	AR015029	Open	6/30/2025	06-2025	WIDGETCC	Widget Credit...
Invoice	AR015028	Open	6/12/2025	06-2025	CJOEQUIP	Jersey Centra...
Invoice	AR015027	Open	6/23/2025	06-2025	WESTWOOD	Westwood Ma...
Invoice	AR015026	Open	6/30/2025	06-2025	KRKCONSULT	KRK Consulti...
Invoice	AR015025	Open	6/30/2025	06-2025	PRECISION	Precision Pho...
Invoice	AR015024	Open	6/30/2025	06-2025	WRIGHTCORN	Wright Corner...
Invoice	AR015023	Open	6/30/2025	06-2025	JEVTCOMPUT	Jevy Compute...
Invoice	AR015022	Open	6/30/2025	06-2025	BEAUTYSCH	New York Inte...
Invoice	AR015021	Open	6/30/2025	06-2025	ELEVATION	Elevation Con...
Invoice	AR015020	Open	6/30/2025	06-2025	WESTWOOD	Westwood Ma...
Invoice	AR015019	Open	6/30/2025	06-2025	ARTCAGES	Artcages

Figure: The list of chats



You can resize the chat window by dragging its borders and move it as needed.

Monitor License Usage and Token Limits

You use the [License Monitoring Console](#) (SM604000) form to track how many tokens have been used. The maximum number of tokens that you can send is displayed on the **License and Constraints** tab (see below).

The screenshot shows the License Monitoring Console interface with the 'LICENSE AND CONSTRAINTS' tab selected. It displays license status, details, and system constraints.

License details	
Monthly Number of Commercial Transactions	3
Monthly Number of ERP Transactions	14
Database Storage Included (GB)	999

Recommended maximums	
Daily Commercial Transactions	2
Daily ERP Transactions	7
Concurrent Users	3

System constraints	
Maximum Number of Web Services API Users	4
Maximum Number of Concurrent Web Services API R...	1
Maximum Number of Web Services API Requests per...	5
Maximum Number of Lines per Transaction	10
Maximum Number of Serial Numbers per Document	100
Maximum Number of Employees Paid by Month	250
Maximum Number of Bank Feed Accounts	10
Maximum Number of Generic Inquiry Rows Checked f...	1000000
Maximum Number of Generic Inquiries Checked for A...	10
Maximum Number of AI Assistant Tokens per Month	10000

Figure: The license limitations

Use the **Constraint History** tab to see how many tokens were used per day and what percentage of the monthly limit that usage represents (shown below).

The screenshot shows the License Monitoring Console interface with the 'CONSTRAINT HISTORY' tab selected. It displays a table of constraint history data.

Date	Tenant ID	Employees Paid by Month (% of Limit)	Active Bank Feeds (% of Limit)	AI Assistant Tokens by Month (% of Limit)
1/19/2026	2	0 (0%)	0 (0%)	0 (0%)
1/14/2026	2	0 (0%)	0 (0%)	35 (0%)
1/13/2026	2	0 (0%)	0 (0%)	0 (0%)

Figure: Token consumption

Learn More

For more information, see:

- [Working with AI Assistant: General Information](#)
- [Exposing Generic Inquiries to AI Assistant: General Information](#)

AI Studio: Renaming of AI Features

In Acumatica ERP2026 R1, we've reorganized and renamed the AI-related features.

Locate AI Features More Easily

In Version 2025 R2, AI Studio and other AI-related features were experimental. In Acumatica ERP 2026 R1, these features have advanced beyond the experimental phase. On the [Enable/Disable Features](#) (CS100000) form, we've moved the corresponding feature switches from the **Experimental Features** group on the [Enable/Disable Features](#) (CS100000) form to the **Platform** group.

The **Platform** group of features now includes the new **AI Studio** group (shown below), which consists of the following renamed feature switches:

- **AI Automation:** Formerly **AI Studio**
- **Anomaly Detection:** Formerly **Detection of Anomalies in Generic Inquiries**

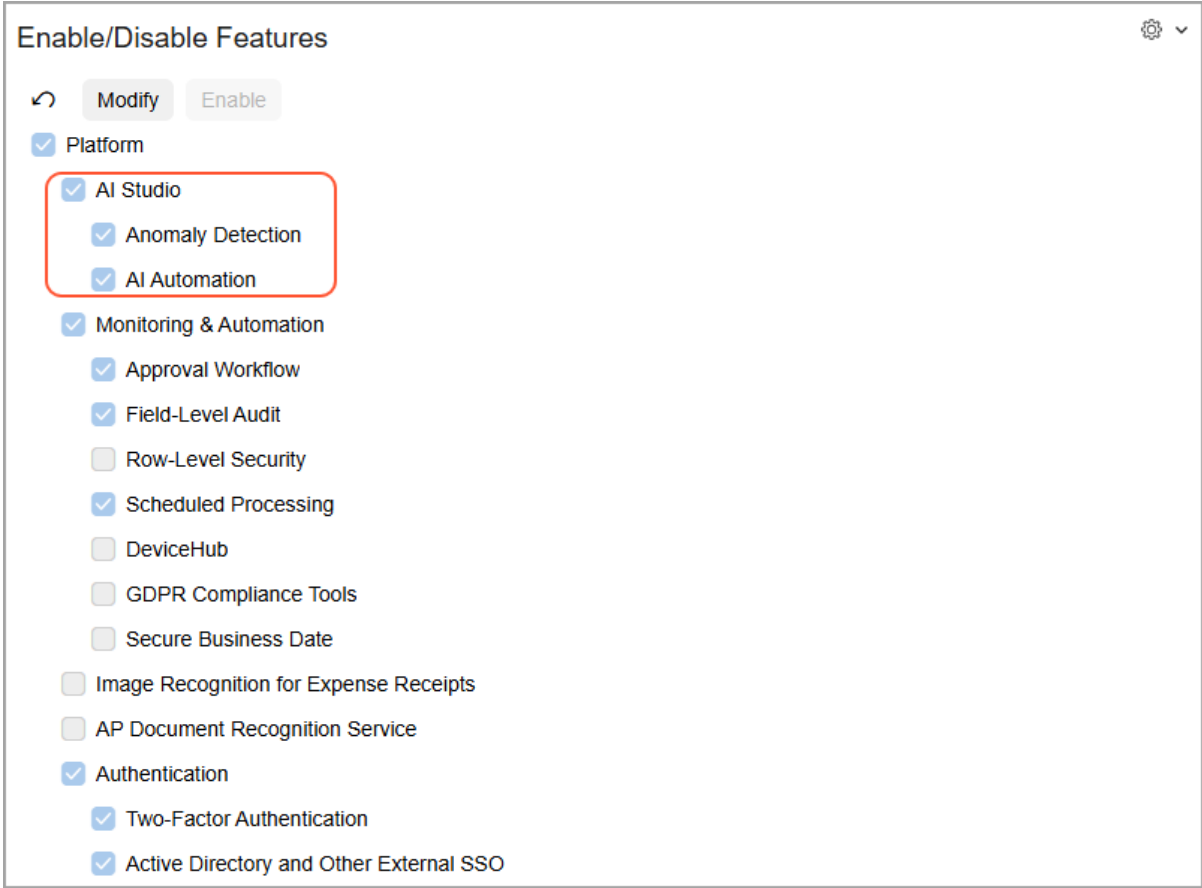


Figure: The new AI Studio group

Learn More

Need more details about AI Automation and anomaly detection? See [Integration with LLM Providers: General Information](#) and [Anomaly Detection: General Information](#).

AI Studio: Collecting Statistics in AI Automation

Large language model (LLM) providers charge by the number of processed tokens, which are small units of text. In AI Studio, you can monitor how many input and output tokens you've used. *Input* refers to the text that you send to the LLM, and *output* refers to the text in the LLM's response.

Starting in Acumatica ERP 2026 R1, the system collects statistics on your LLM prompts, connections, and commands. Real-time monitoring can help you avoid budget overruns, prevent errors caused by excess token usage, and understand your usage patterns. These insights can help you refine prompts and decide whether a more efficient LLM is worth considering.



AI Studio is available only if the *AI Studio* feature is enabled on the [Enable/Disable Features](#) (CS100000) form. This feature is subject to licensing; consult the Acumatica ERP sales policy for details.

Collect Token Statistics

To help you keep track of the tokens used for a particular prompt, we've added new boxes to the [LLM Prompts](#) (ML202000) form. You can now see at a glance the number of input and output tokens, as well as their total amount (see below).

The screenshot shows the 'LLM Prompts' form for 'CLOSURE-NOTES - Generate Closure Notes'. The form includes fields for Prompt ID, Prompt Name, LLM Connection, Source Form, and Button Name. A 'Prompt Testing' section shows an 'Example Record' and a 'Test Prompt' button. A table displays token statistics:

Input Tokens	706
Output Tokens	118
Total Tokens	824

The 'RESPONSE' tab is active, showing a JSON response for the prompt. The response includes a 'Problem Type' and a 'Problem Description'.

```
{
  "((Case.ClosureNotes))": "Problem Type: Product Support\nProblem Description: The customer inquired about which vegetables cannot be juiced using the JUICER10.\nProblem Symptoms: No specific symptoms documented.\nResolution Status: Resolved.\nResolution Details: The support agent informed the customer that most vegetables are suitable for juicing with JUICER10 if peeled and cut into small pieces. Coconut was highlighted as a vegetable not recommended for juicing due to its lack of juiciness. No follow-up items were required.\nCustomer Satisfaction: Yes"
}
```

Figure: Statistics on tokens

You view statistics for all LLM connections, prompts, and LLM-generated commands on the new *AI Studio History* (ML400000) form, as shown below. Each time you perform an operation in AI Studio, the system adds the appropriate record to the table. The **Type** column indicates the type of each record:

- *Connection Test*: Testing of an LLM connection on the [LLM Connections](#) (ML201000) form

- *Prompt Test*: Testing of an LLM prompt on the [LLM Prompts](#) (ML202000) form
- *Action*: Testing of an LLM-generated command on a particular form

AI Studio History

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☰ All Records ▾ 🔍 Search 🗨️ ▾

Request ID	Request Group ID	LLM Provider Name	Connection ID	Connection Name	Type	Prompt ID	Form	Status	Input Tokens	Output Tokens	Total Tokens
> 3466b10...	3466b10...	Azure via Cloud...	LLM01	gpt-4o-mini	Connection Test		ML.20.10.00	Success	3	1	4
13eec2b...	b67416f...	Azure via Cloud...	LLM01	gpt-4o-mini	Prompt Test	STOCK-ITEM-DESC	ML.20.20.00	Success	1036	364	1400
671a07a...	671a07a...	Azure via Cloud...	LLM01	gpt-4o-mini	Connection Test		ML.20.10.00	Success	3	1	4
cd4294f8...	6e5fdef7...	Azure via Cloud...	LLM01	gpt-4o-mini	Prompt Test	CLOSURE-NOTES	ML.20.20.00	Success	562	115	677
59144ba...	daddd4e...	Azure via Cloud...	LLM01	gpt-4o-mini	Prompt Test	CLOSURE-NOTES	ML.20.20.00	Success	706	125	831
ec411ab...	ec411ab...	Azure via Cloud...	LLM01	gpt-4o-mini	Connection Test		ML.20.10.00	Success	3	1	4
9401b5c...	ba1ad5d...	Azure via Cloud...	LLM01	gpt-4o-mini	Prompt Test	CLOSURE-NOTES	ML.20.20.00	Success	706	142	848
a1c37fe5...	3ce25a3...	Azure via Cloud...	LLM01	gpt-4o-mini	Prompt Test	CLOSURE-NOTES	ML.20.20.00	Success	706	118	824
794d483...	7f26073...	Azure via Cloud...	LLM01	gpt-4o-mini	Action	CLOSURE-NOTES	CR.30.60.00	Success	571	105	676
15c64f7e...	0d3d6ed...	Azure via Cloud...	LLM01	gpt-4o-mini	Prompt Test	STOCK-ITEM-DESC	ML.20.20.00	Success	1067	313	1380
7b260cf8...	a9440ff4...	Azure via Cloud...	LLM01	gpt-4o-mini	Action	STOCK-ITEM-DESC	IN.20.25.00	Success	1036	329	1365

Figure: The AI Studio History form

Take Action Based on Statistics

When you review the data on the *AI Studio History* (ML400000) form, you can decide on your course of action as follows:

- If the number of output tokens is large, you may want to use another LLM. (Different LLMs respond differently.)
Alternatively, you can change the prompt and ask the LLM to be brief.
- If the number of input tokens is large, try using shorter prompts.
- If errors occur, review the error messages to determine whether you need to modify the connection settings or the instructions.

Tips for Success

- Track the number of used tokens to stay within budget.
- Determine how you can optimize your prompts so that they use fewer tokens.

Learn More

For more information, see:

- [Integration with LLM Providers: General Information](#)
- [Integration with LLM Providers: Collection of Statistics](#)

AI Studio: Custom Connection Parameters in AI Automation

In AI Studio, you specify connection parameters, which depend on the large language model (LLM) provider you use. When the provider modifies any of those parameters, you need to update your connection settings accordingly. Doing so helps you avoid errors when you're testing the connection, running prompts, or invoking LLM-generated commands.

Acumatica developers update the list of connection parameters regularly; however, you might want to update the settings manually before you receive updates from us. Whether your provider has added a new parameter or removed an obsolete one, in Acumatica ERP 2026 R1, you can keep your connection data up-to-date with the help of custom parameters.



AI Studio is available only if the *AI Studio* feature is enabled on the [Enable/Disable Features](#) (CS100000) form. This feature is subject to licensing; consult the Acumatica ERP sales policy for details.

Read on to learn how to update your connection settings with custom parameters.

Add and Delete Custom Parameters

Suppose that you've tested the LLM connection and your prompts work as expected. Then your LLM provider adds a new parameter. The next time you test a prompt that uses this connection or invoke an LLM-generated command, the system displays an error indicating that a parameter is missing.

To fix this, you add a custom parameter by clicking **Add Row** in the **Connection Parameters** table on the [LLM Connections](#) (ML201000) form. You specify the ID, name, and value for the added parameter. The system automatically selects the check box in the new **Custom Parameter** column (shown below); this check box is read-only.

The screenshot shows the 'LLM Connections' form for 'LLM01 - gpt-4o-mini'. The 'Connection Parameters' table is visible, with the following data:

Custom Parameter	*Parameter ID	Parameter	Value	Encrypted	Header
<input type="checkbox"/>	api-key	API Key	*****	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	api-version	API Version	2025-11-15	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	model	Model/Deployment		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	target-uri	Target URI	https://...openai.azure.com/op...	<input type="checkbox"/>	<input type="checkbox"/>

Figure: The added custom parameter



Check the provider's website to get information about parameter changes.

You can also select the **Encrypted** check box for the custom parameter to hide it on the form and encrypt it in the database (see below). If the parameter should be sent to the provider as an HTTP header, you select the **Header** check box.

The screenshot shows the 'LLM Connections' interface for a connection named 'LLM01 - gpt-4o-mini'. The status is 'Active'. The 'Connection Parameters' table is as follows:

Custom Parameter	Parameter ID	Parameter	Value	Encrypted	Header
<input type="checkbox"/>	api-key	API Key	*****	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	model	Model/Deployment		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	target-uri	Target URI	https://api.openai.azure.com/o...	<input type="checkbox"/>	<input type="checkbox"/>

Figure: The **Encrypted** and **Header** check boxes

We recommend that you select the **Encrypted** check box for sensitive data, such as credentials.



After you add an encrypted parameter, save your changes on the form, and switch to another record or leave the form:

- The **Encrypted** check box becomes read-only.
- The **Value** column becomes masked, and you can't see the value of the parameter anymore.

If the provider removes a parameter, the system also displays an appropriate message. You can remove this parameter by clicking **Delete Row** on the table toolbar and test the connection or prompt again.

Sync Connection Settings

Suppose that after you've added custom parameters, Acumatica developers have updated the list of connection parameters in the system. To reflect these changes in your LLM connection, you need to synchronize your settings with the system data.

To do this, you click **Refresh** to the right of the **LLM Provider** box in the Summary area (Item 1 below). The system downloads the latest version of the connection parameters from the cloud service to the database. You then click **Apply System Updates** on the table toolbar of the **Connection Parameters** table (Item 2). In the dialog box that opens, you select how you want to proceed with the updates.

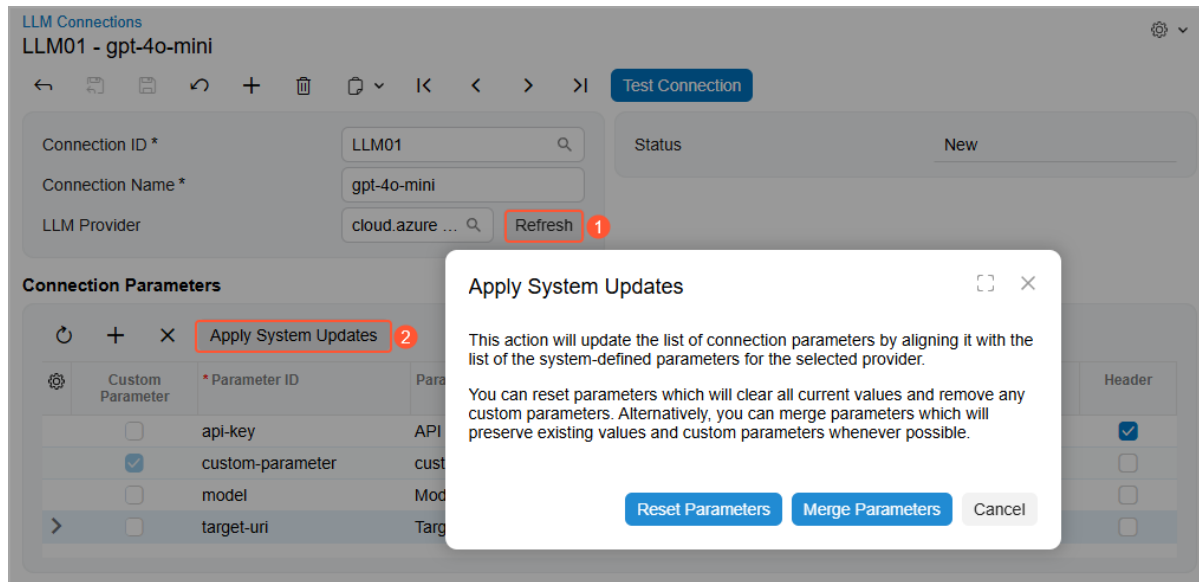


Figure: The Apply System Updates dialog box

You can click **Reset Parameters** or **Merge Parameters**.

Clicking **Reset Parameters** removes custom parameters, updates the values of existing parameters, removes unneeded ones, and adds new parameters according to the provider's list. The table will contain only system parameters without any values, and you'll need to reenter the values from scratch.

Clicking **Merge Parameters** adds updated parameters from the provider's list and preserves custom ones. Depending on whether the ID of a custom parameter matches the ID of a system parameter, the system handles this custom parameter as follows:

- If the ID is the same: Updates the **Parameter**, **Encrypted**, and **Header** columns. Any value that you've entered in the **Value** column for this parameter remains unchanged.
- If the ID is different: Does not change anything.



For each custom parameter whose ID matches a system parameter, the system clears the check box in the **Custom** column, indicating that the parameter is now a system one.

Key Capabilities

- Add custom parameters for manual sync
- Apply system updates to load the latest version of connection parameters

Learn More

For more information, see:

- [Integration with LLM Providers: General Information](#)
- [Integration with LLM Providers: Use of Custom Connection Parameters](#)

AI Studio: Hiding Sensitive Data in AI Automation

Some data in Acumatica ERP—such as account numbers and prices—shouldn't leave your system. If you've avoided using certain prompts with AI tools because of security concerns, you can put those worries aside.

Starting in Acumatica ERP 2026 R1, you can use **data masking** in AI Studio to keep sensitive data secure. Here's how it works:

- You mask any sensitive details in your requests to a large language model (LLM) before sending them to the cloud.
- The real data never leaves Acumatica ERP—the LLM receives only masked content.
- When the LLM returns the processed data to Acumatica ERP, the system replaces the masked content with the actual data.



AI Studio is available only if the *AI Studio* feature is enabled on the [Enable/Disable Features](#) (CS100000) form. This feature is subject to licensing; please consult the Acumatica ERP sales policy for details.

Read on to learn how AI Studio makes sure that the original data stays within Acumatica ERP.

Masking Fields in the Instructions

Suppose that you've created a prompt on the [LLM Prompts](#) (ML202000) form, and this prompt generates closure notes for a support case. It includes the case's owner and business account (shown below), and you don't want this data to go anywhere outside of Acumatica ERP.

The screenshot shows the 'LLM Prompts' interface for a prompt titled 'SUPPORT CASE - Support Case Notes'. The prompt is active and has a search bar for 'SUPPORT CASE'. The 'INSTRUCTIONS' tab is selected, showing the following text:

```

## Context Instructions
You are an AI assistant working with Acumatica ERP data.

## Instructions with Input Data
Compose closure notes for a support case. Mention all info about the case in closure notes. Mention case ID and sender name obligatory.

Case Information:
- Case ID: {{Case.CaseCD}}
- Reported On: {{Case.ReportedOnDateTime}}
- Sender {{Case.ContactID}}
- Business Account: {{Case.CustomerID}}
- Subject: {{Case.Subject}}

## Output Data Field
@{{Case.CaseCD}}: Assign current Case ID
@{{Case.ReportedOnDateTime}}: Assign the Reported On date of the case
@{{Case.ClosureNotes}}: Generate closure notes for the case

## Output Format Example:
{
  {{Case.CaseCD}}: "Case.CaseCD".
  {{Case.ReportedOnDateTime}}: "05/07/2022 5:11 PM".
  {{Case.ClosureNotes}}: "Generated Closure Notes".
}

```

The 'Case Information' section is highlighted with a red box, indicating unmasked fields.

Figure: Unmasked fields in the prompt

To mask these fields, click **Insert > Masked Data Field** (shown below) and select the needed field in the dialog box that opens.

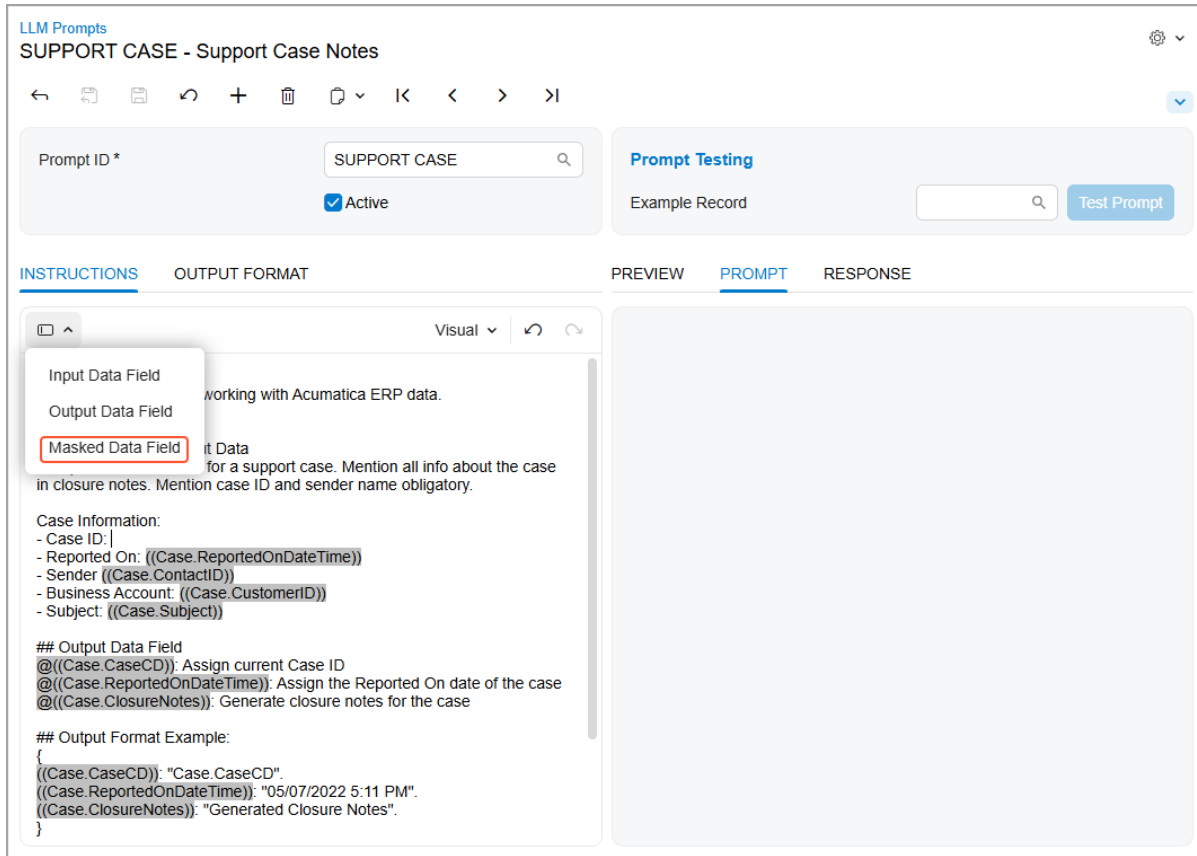


Figure: The Masked Data Field command

Notice that the system adds the *MASKED* prefix to the masked fields (see below).

LLM Prompts

SUPPORT CASE - Support Case Notes

Prompt ID * SUPPORT CASE

Active

Prompt Testing

Example Record Test Prompt

INSTRUCTIONS OUTPUT FORMAT PREVIEW **PROMPT** RESPONSE

Visual ↕ ↻

Context Instructions
You are an AI assistant working with Acumatica ERP data.

Instructions with Input Data
Compose closure notes for a support case. Mention all info about the case in closure notes. Mention case ID and sender name obligatory.

Case Information:

- Case ID: MASKED((Case.CaseCD))
- Reported On: ((Case.ReportedOnDateTime))
- Sender MASKED((Case.ContactID))
- Business Account: MASKED((Case.CustomerID))
- Subject: ((Case.Subject))

Output Data Field

@((Case.CaseCD)): Assign current Case ID
 @((Case.ReportedOnDateTime)): Assign the Reported On date of the case
 @((Case.ClosureNotes)): Generate closure notes for the case

Output Format Example:

```
{
  ((Case.CaseCD)): "Case.CaseCD",
  ((Case.ReportedOnDateTime)): "05/07/2022 5:11 PM",
  ((Case.ClosureNotes)): "Generated Closure Notes".
}
```

Figure: Masked fields in the prompt

When you select an example record, the system displays the masked data on the **Prompt** tab (shown below) instead of the real data. This is the information that the system will send to the LLM.

LLM Prompts
SUPPORT CASE - Support Case Notes

Prompt ID * SUPPORT CASE

Active

Prompt Testing

Example Record 000009, Request for compati... Test Prompt

INSTRUCTIONS OUTPUT FORMAT PREVIEW PROMPT RESPONSE

```

## Context Instructions
You are an AI assistant working with Acumatica ERP data.

## Instructions with Input Data
Compose closure notes for a support case. Mention all info about the case in closure notes. Mention case ID and sender name obligatory.

Case Information:
- Case ID: MASKED((Case.CaseCD))
- Reported On: ((Case.ReportedOnDateTime))
- Sender: MASKED((Case.ContactID))
- Business Account: MASKED((Case.CustomerID))
- Subject: ((Case.Subject))

## Output Data Field
@((Case.CaseCD)): Assign current Case ID
@((Case.ReportedOnDateTime)): Assign the Reported On date of the case
@((Case.ClosureNotes)): Generate closure notes for the case

## Output Format Example:
{
  ((Case.CaseCD)): "Case.CaseCD",
  ((Case.ReportedOnDateTime)): "05/07/2022 5:11 PM",
  ((Case.ClosureNotes)): "Generated Closure Notes".
}

## Important Note:
The output must contain only the JSON object, without additional text, explanations, or comments. Make sure that the JSON object is properly formatted: Use double quotes for keys and string values, and place commas and braces correctly.
    
```

```

## Context Instructions
You are an AI assistant working with Acumatica ERP data.

## Instructions with Input Data
Compose closure notes for a support case. Mention all info about the case in closure notes. Mention case ID and sender name obligatory.

Case Information:
- Case ID: Case.CaseCD
- Reported On: 12/8/2026 6:47 AM
- Sender Case: ContactID
- Business Account: Case.CustomerID
- Subject: Request for compatibility of accessories

## Output Data Field
((Case.CaseCD)): Assign current Case ID
((Case.ReportedOnDateTime)): Assign the Reported On date of the case
((Case.ClosureNotes)): Generate closure notes for the case

## Output Format Example:
{
  000009: "Case.CaseCD",
  12/8/2026 6:47 AM: "05/07/2022 5:11 PM",
  : "Generated Closure Notes".
}

## Important Note:
The output must contain only the JSON object, without additional text, explanations, or comments. Make sure that the JSON object is properly formatted: Use double quotes for keys and string values, and place commas and braces correctly.

## Output Format Example:
{
  "((Case.CaseCD))": "Case.CaseCD",
  "((Case.ReportedOnDateTime))": "8/27/2026 12:47:58 PM"
}
    
```

Figure: Masked fields in the test prompt

When you test the prompt and the LLM sends the processed data back to Acumatica ERP, the system replaces the masked content with the actual data (see below).

LLM Prompts

SUPPORT CASE - Support Case Notes

Prompt ID *

Active

Prompt Testing

Example Record

INSTRUCTIONS OUTPUT FORMAT PREVIEW PROMPT **RESPONSE**

```

## Context Instructions
You are an AI assistant working with Acumatica ERP data.

## Instructions with Input Data
Compose closure notes for a support case. Mention all info about the case in closure notes. Mention case ID and sender name obligatory.

Case Information:
- Case ID: MASKED((Case.CaseCD))
- Reported On: ((Case.ReportedOnDateTime))
- Sender MASKED((Case.ContactID))
- Business Account: MASKED((Case.CustomerID))
- Subject: ((Case.Subject))

## Output Data Field
@((Case.CaseCD)): Assign current Case ID
@((Case.ReportedOnDateTime)): Assign the Reported On date of the case
@((Case.ClosureNotes)): Generate closure notes for the case

## Output Format Example:
{
  ((Case.CaseCD)): "Case.CaseCD".
  ((Case.ReportedOnDateTime)): "05/07/2022 5:11 PM".
  ((Case.ClosureNotes)): "Generated Closure Notes".
}

```

```

{
  "((Case.CaseCD))": "000009",
  "((Case.ReportedOnDateTime))": "12/8/2026 6:47 AM",
  "((Case.ClosureNotes))": "Closure notes for case ID 000009. The request was received from 100206 regarding the compatibility of accessories for Business Account . The issue has been reviewed, and the necessary information has been provided to the contact. This case is now closed."
}

```

Figure: The Response tab with real data

Masking Groups of Fields

You can mask lists of records—such as a case’s activities or an invoice’s detail lines—by using the `foreach` loop (Item 1 below) to iterate through the records. The system masks each field and adds a numerical suffix (starting with 0) to each record, as Items 2 and 3 show.

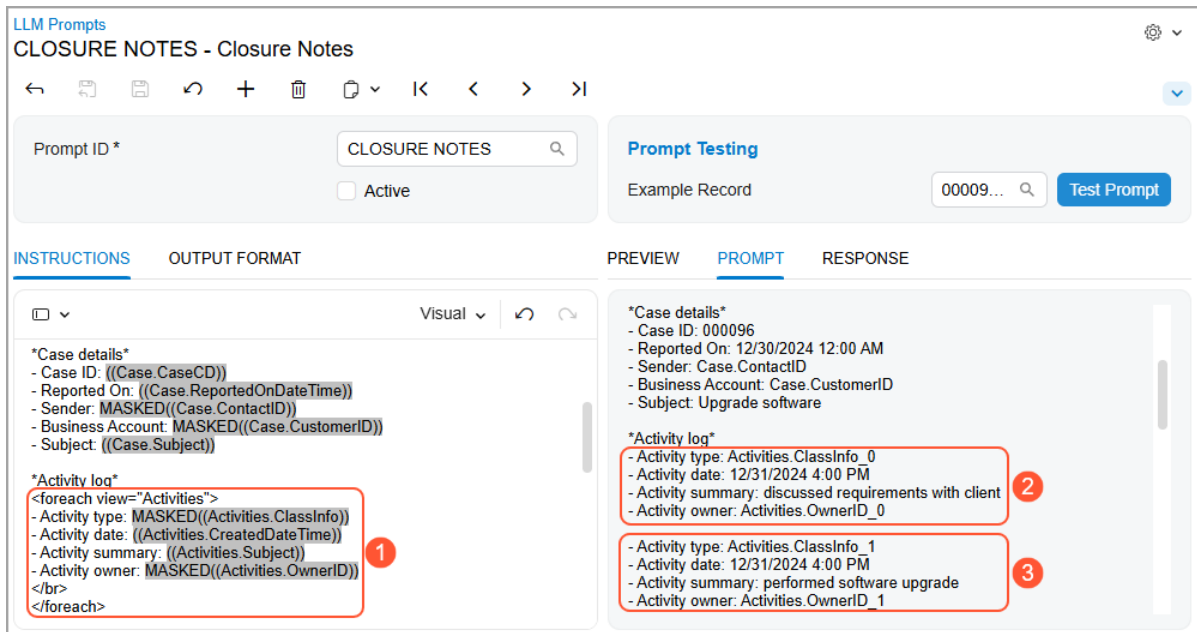


Figure: Masking of multiple fields

Similarly, you can add masked fields to a table. The example below shows a table that lists case activities.

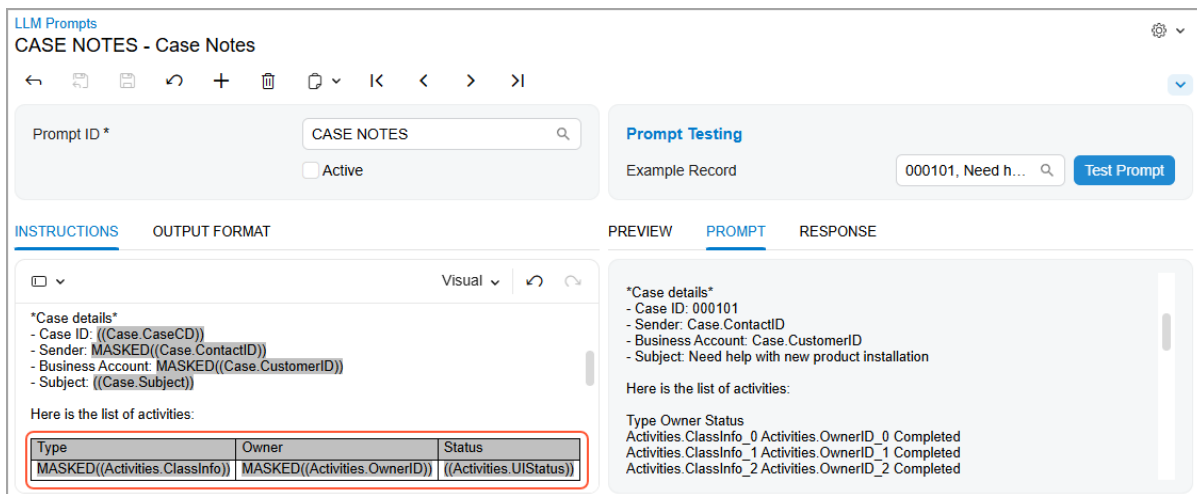



Figure: Table with case activities

For details on using the `foreach` loop and listing details in a table, see [Email Templates](#).

 You can mask any field that’s displayed in the dialog box that opens when you click **Insert > Masked Data Field**. This includes attributes and user-defined fields.

Masking Data in Output Format Examples

An output format example is a part of the prompt—so it’s also sent to the LLM. When the system generates the example, it uses real data from the database. If it detects a field in the example that has a masked version in the **Instructions with Input Data** section of the **Instructions** tab, the system does the following:

1. Replaces this field with its masked version
2. Displays a warning about this replacement (shown below)

You can replace the data in the example with any arbitrary values.

The screenshot shows the 'LLM Prompts' interface for 'SUPPORT CASE - Support Case Notes'. It includes a search bar for 'Prompt ID *' with the value 'SUPPORT CASE', an 'Active' checkbox, and a 'Prompt Testing' section with an 'Example Record' search bar and a 'Test Prompt' button. A yellow warning banner states: 'The system has detected sensitive data in your output example and has masked those values for security reasons. The actual response will contain real data. If you want to use real data in your example, update it on the Output Format tab.' Below this, the 'OUTPUT FORMAT' tab is active, showing a 'Generate Example' button and a code editor with the following content:

```
## Output Format Example:
{
  "((Case.CaseCD))": "Case.CaseCD",
  "((Case.ReportedOnDateTime))": "8/27/2026 12:47:58 PM"
}

## Important Note:
The output must contain only the JSON object, without additional text,
explanations, or comments. Make sure that the JSON object is properly
formatted: Use double quotes for keys and string values, and place
commas and braces correctly.
```

The right side of the interface shows tabs for 'PREVIEW', 'PROMPT', and 'RESPONSE', with the 'PREVIEW' tab currently selected and empty.

Figure: A warning about masking output fields

Tracking Your Data

Want to track your data throughout the masking process? Go to the Trace page to see how:

1. The system has masked the specified fields (Item 1 below).
2. The system has recorded the real values of those fields (Item 2).



These real values stay within the system and are never shared with the LLM.

3. The LLM returns the data in which the fields are masked (Item 3).

Last Requests Screen: All Type: All [SUBMIT LOGS](#)

Screen ID	Request Type	Com...	Duration, ms	Time (UTC)
ML202000	Screen	Elap...	283	14:58:27
ML202000	LongRun	Test...	2 695	14:58:22
ML202000	Screen	Test...	258	14:58:22
ML202000	Screen	Eval...	80	14:57:34
ML202000	Screen	Upd...	794	14:57:33
ML202000	Screen	GetD...	168	14:57:31
ML202000	Screen	GetD...	85	14:57:31
ML202000	Screen	Save	433	14:56:05
ML202000	Screen	GetN...	158	14:55:42
ML202000	Screen	GetN...	1 168	14:55:34
ML202000	Screen	GetN...	339	14:55:14

User Name: admin:HEADOFFICE Local Time: 2025-...
Version: 26.091.0407 UTC Time: 2025-...
Customizations: None

Message: Request prompt: ## Context Instructions
You are an AI assistant working with Acumatica ERP data.

Instructions with Input Data
Compose closure notes for a support case. Mention all info about the case in closure notes. Mention case ID and sender name obligatory.

Case Information:

- Case ID: Case.CaseCD
- Reported On: 12/8/2026 6:47 AM
- Sender Case.ContactID
- Business Account: Case.CustomerID
- Subject: Request for compatibility of accessories

Output Data Field
((Case.CaseCD)): Assign current Case ID
((Case.ReportedOnDateTime)): Assign the Reported On date of the case
((Case.ClosureNotes)): Generate closure notes for the case

Output Format Example:
[Show more](#)

> **Information** 2025-10-27 14:58:22 UTC
Request output fields: ["Case.CaseCD", "Case.ReportedOnDateTime", "Case.ClosureNotes"]

▼ **Information** 2025-10-27 14:58:22 UTC

Category: Trace

Message: Request masked fields: ["Case.CaseCD = 000009", "Case.ContactID = 100206", "Case.CustomerID = "]

▼ **Information** 2025-10-27 14:58:25 UTC

Category: Trace

Message: Llm response: {
"((Case.CaseCD))": "Case.CaseCD",
"((Case.ReportedOnDateTime))": "12/8/2026 6:47 AM",
"((Case.ClosureNotes))": "Closure notes for case ID Case.CaseCD. The request was received from Case.ContactID regarding the compatibility of accessories for Business Account Case.CustomerID. The issue has been reviewed, and the necessary information has been provided to the contact. This case is now closed."
}

Figure: The Trace page

Tips for Success

- Create a prompt as you usually do.
- Identify what fields have sensitive data.
- Use the new **Masked Data Field** command to insert each applicable field in a masked form.
- Mask only specific fields or all fields.

Masking Limitation

You can't mask fields that are part of a larger text field (such as case closure notes or an email reply). Even if you also add masked versions of those fields somewhere else in the instructions, the system won't mask them in this text field.

Learn More

For details on configuring LLM prompts, see [Integration with LLM Providers: General Information](#).

AI Studio: Nested Generic Inquiries in Anomaly Detection

In Acumatica ERP 2024 R2, we introduced anomaly detection in generic inquiries. However, you couldn't use it for a generic inquiry that relied on another generic inquiry as its data source. In Version 2026 R1, this limitation has been removed.



These capabilities are available only if the *Anomaly Detection* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn how anomaly detection now works with more complex generic inquiries.

Detect Anomalies in Complex Generic Inquiries

Suppose that you want to run anomaly detection for the *PM-Project Profitability* generic inquiry. This inquiry uses the *PM-Project Budget History By Date* and *PM-Project Profit History By Date* generic inquiries as its source.

* Source Name	Description	* Alias
PM-Project Budget History By Date		BudgetHistory
PM-Project Profit History By Date		ProfitHistory
PM-ProjectCostProjectionsReport	Cost Projections By Date Report	ProjectCostProjectionByDate
PX.Objects.PM.PMCostProjectionByDate	Contains the main properties of a date-sensitive cost project...	Def
PX.Objects.PM.PMProject	A planned set of related tasks to be executed over a fixed pe...	Project

Figure: Generic inquiries selected as a source for another inquiry

Now you can run anomaly detection by performing the same steps you use for simple generic inquiries. Specifically, you do the following on the [Generic Inquiry](#) (SM208000) form:

1. Select the **Detect Anomalies** check box on the **Interface Options** tab.
2. Select a field for analysis on the **Anomaly Detection** tab.

In the **Field for Analysis** box (see below), you can select a field from the current generic inquiry or from the source inquiry.

3. Optional: Select the data field for the timeline on the **Anomaly Detection** tab.
4. Specify the schedule.

The screenshot displays the 'Generic Inquiry' configuration window. At the top, there are navigation icons and buttons for 'View Inquiry', 'Detect Anomalies', 'Publish to the UI', and 'Unpublish'. The main configuration area includes:

- Inquiry Title ***: PM-Project Profitability
- Mode**: Low-Code Advanced
- Site Map Title**: Project Profitability
- Screen ID**: PM.65.81.00

Below these fields is a horizontal menu with tabs: DATA SOURCES, RELATIONS, PARAMETERS, CONDITIONS, GROUPING, SORT ORDER, and **ANOMALY DETECTION**. The 'ANOMALY DETECTION' tab is active, showing a configuration panel with:

- Field for Analysis ***: A dropdown menu is open, listing various fields. 'Projected Margin (%)' is selected and highlighted in blue.
- Date Field for Timeline**: (Empty)
- Grouping**:
 - Skip Empty Groups
 - Refresh, Add (+), and Remove (x) icons.
 - Data Field**: (Empty)
- Update Frequency**:
 - Update Frequency ***: On Demand

Figure: Selection of a field for analysis

You then click **Detect Anomalies** on the form toolbar to open the [Detect Anomalies in Generic Inquiries](#) (ML502000) form and run anomaly calculation. The result is shown below; in this example, no anomalies were found.

Project Profitability

Through Date * 1/23/2026

Project

All Records

Revised Contract	Revised Budget	Revised Profit	Revised Margin (%)	Billed Amount to Date	Actual Costs to Date	Profit to Date	Margin to Date (%)	Anomaly Severity	Expected Value (Original Margin %)	Comment	Reviewed
10,000.00	5,500.00	4,500.00	45.00	10,000.00	4,005.00	5,995.00	59.95	Normal	0.00		<input type="checkbox"/>
6,000.00	3,400.00	2,600.00	43.33	0.00	0.00	0.00	0.00	Normal	0.00		<input type="checkbox"/>
6,000.00	3,400.00	2,600.00	43.33	0.00	3,618.10	-3,618.10	0.00	Normal	0.00		<input type="checkbox"/>
5,384,538.68	3,668,529.00	1,716,009.68	31.87	3,560,262.51	2,652,568.37	907,694.14	25.50	Normal	0.00		<input type="checkbox"/>
2,022,649.33	1,662,146.80	360,502.53	17.82	0.00	0.00	0.00	0.00	Normal	0.00		<input type="checkbox"/>
1,961,223.00	1,638,439.25	322,783.75	16.46	1,364,677.75	1,309,538.00	55,139.75	4.04	Normal	0.00		<input type="checkbox"/>
39,715,457.00	28,675,654.71	11,039,802.29	27.80	25,967,668.10	20,242,445.91	5,725,222.19	22.05	Normal	0.00		<input type="checkbox"/>
340,556.00	260,925.00	79,631.00	23.38	161,705.40	152,071.09	9,634.31	5.96	Normal	0.00		<input type="checkbox"/>
305,500.00	271,055.00	34,445.00	11.27	0.00	0.00	0.00	0.00	Normal	0.00		<input type="checkbox"/>
1,995,984.80	1,632,601.00	363,383.80	18.21	1,286,196.05	1,431,388.99	-145,192.94	-11.29	Normal	0.00		<input type="checkbox"/>
399,093.30	285,841.00	113,252.30	28.38	238,068.45	183,059.74	55,008.71	23.11	Normal	0.00		<input type="checkbox"/>
10,000.00	6,000.00	4,000.00	40.00	10,000.00	4,400.00	5,600.00	56.00	Normal	0.00		<input type="checkbox"/>
12,000.00	9,400.00	2,600.00	21.67	12,000.00	10,130.00	1,870.00	15.58	Normal	0.00		<input type="checkbox"/>

Figure: The result of anomaly calculation

Know the Limitations

When you add the required parameters to your generic inquiries, you must specify default values for these parameters before using anomaly detection. If default values are not specified and you try to select the **Detect Anomalies** check box on the *Generic Inquiry* (SM208000) form, the system displays an error, as shown below.

Generic Inquiry

Inquiry Title * Project Variance

Mode Low-Code Advanced

Site Map Title Project Variance

Screen ID PM.65.10.20

DATA SOURCES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER **INTERFACE OPTIONS**

Select Top 0 Records

Records per Page 0

Export Top 0 Records

Attach Notes To Not Applicable

Show Deleted Records

Show Archived Records

Disable Record Counts and Totals

Expose via OData

Expose to the Mobile Application

Detect Anomalies

Default values are not specified for the required parameters in this generic inquiry. It is not possible to run anomaly detection.

Figure: Missing default value for a required parameter

If you've already run anomaly calculation for a generic inquiry and you modify its settings on the **Anomaly Detection** tab, the existing calculation becomes outdated. In this case, you must start a new calculation. If a

schedule is already running, the system stops it and then reruns the calculation with the updated values. The system displays a warning.

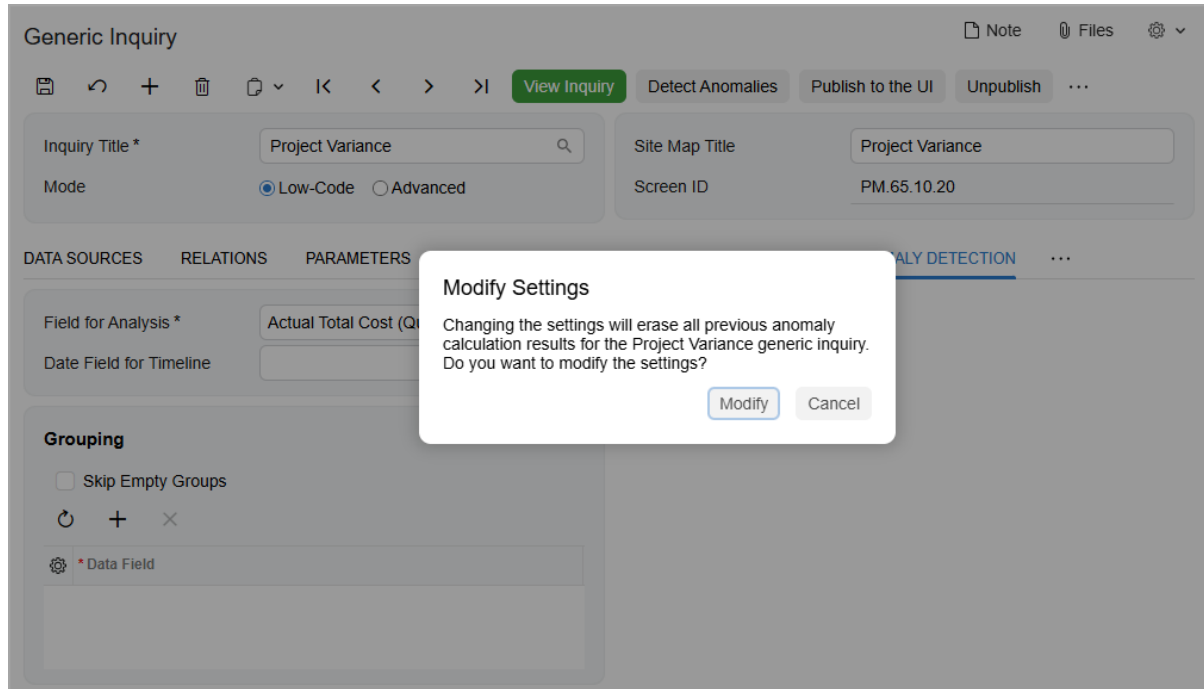



Figure: The warning for generic inquiry modification

We recommend not modifying a generic inquiry that's used as a source. These changes affect the dataset and invalidate existing calculations. If you need to modify a source inquiry, stop the current calculation, make the needed changes, and then run the process again. (To stop the current calculation, select the needed inquiry on the [Detect Anomalies in Generic Inquiries](#) form and click **Reset Data** on the form toolbar.)

 You can run anomaly calculation for both the source generic inquiry and the inquiry that uses it.

Learn More

For more information on anomaly detection and nested generic inquiries, see [Anomaly Detection: General Information](#) and [Data from Multiple Data Sources: Use of Generic Inquiry as Data Source](#).

AI Studio: Reusable System Instructions in AI Automation

When you use AI Automation across many business workflows, it becomes increasingly important to keep prompts consistent, safe, and aligned with your company's policies. In Acumatica ERP 2026 R1, reusable system instructions help you centralize security, safety, and governance guidance for your prompts.

Security experts can now define template instructions once and make them available to prompt engineers, who can then insert and adapt the text directly in their LLM prompts. This approach promotes consistent AI behavior, supports compliance efforts, and speeds up prompt creation across the system.



This functionality is available only if the *AI Automation* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn how you can use reusable system instructions in your prompts.

Leveraging the Set of System Instructions

In the previous version, you had to manually add instructions—such as *Maintain a professional tone* and *Don't expose personal data*—to each prompt. These instructions were easy to forget or apply inconsistently.

With **reusable system instructions**, you can maintain a centralized library that includes the following:

- **Safety instructions** to help users avoid harmful or unintended outcomes
- **Security instructions** that cover topics like access control and data confidentiality
- **General instructions** that can be reused—such as general communication principles, roles, and response format

Using reusable instructions ensures that every new prompt starts with a standard baseline, while still giving prompt engineers enough flexibility to tailor instructions to specific business cases.

Using New Roles

To make it easier for you to work with reusable instructions, we've added the following roles to the system:

- *Security Expert*: Creates system instructions and reviews, tests, and approves LLM prompts created by prompt engineers.
- *Prompt Engineer*: Creates LLM prompts and inserts system instructions into these prompts.

With these roles assigned to the appropriate users, prompt preparation typically follows this process:

1. A security expert creates and maintains system instructions on the new *LLM System Instructions* (ML203000) form.
2. A prompt engineer uses the *LLM Prompts* (ML202000) form to:
 - Compose full prompt definitions
 - Insert system instructions where needed
 - Test prompts by using real data
3. The security expert reviews, tests, and approves the prompts created by the prompt engineer.

Creating System Instructions

You create system instructions on the *LLM System Instructions* (ML203000) form, as shown below.

You enter the text of a set of instructions in the **Instructions** section of the form. You then select the **Active** check box to make this set of instructions available for selection on the *LLM Prompts* (ML202000) form. If you select the

Default check box (also shown below), the system automatically add this set of instructions to each new prompt created on the [LLM Prompts](#) form.

The screenshot shows the 'LLM System Instructions' form for a 'DEFAULT INSTR' entry. At the top, there are navigation icons. Below them, the 'Instruction Name' is 'DEFAULT INSTR' and the 'Description' is 'Default System Instructions'. To the right, there are two checked checkboxes: 'Active' and 'Default'. The 'Instruction' field contains the following text:

```

## System Instructions

General instructions:

You are an AI assistant supporting users with Acumatica ERP data. Your role is to assist with customer communication via email. You must be polite, professional, concise, and attentive to context. Always maintain a helpful and respectful tone aligned with Acumatica's standards.

Format:

- Use clean, semantic HTML
- Generate scannable layout with proper formatting (headings, paragraphs, bullet points, etc.)

```

Figure: The LLM System Instructions form



You can select the **Active** and **Default** check boxes for multiple sets of instructions. Adding new default instructions does not affect the existing prompts.

If there are multiple default instructions, the system inserts all of them into the prompt.

Inserting System Instructions into Prompts

As a prompt engineer, you do the following when you create and test an LLM prompt on the [LLM Prompts](#) (ML202000) form:

- If default system instructions exist, the system inserts them into the prompt before the **Context Instructions** section. You can move, modify, or remove them.



These changes don't affect the original system instructions.

- If there are no default system instructions, you can insert system instructions manually by clicking **Insert Instructions** on the **Instructions** tab of the [LLM Prompts](#) form (Item 1 below). In the dialog box, you then specify where you want to add them: at the beginning of the prompt or at the end (Item 2).

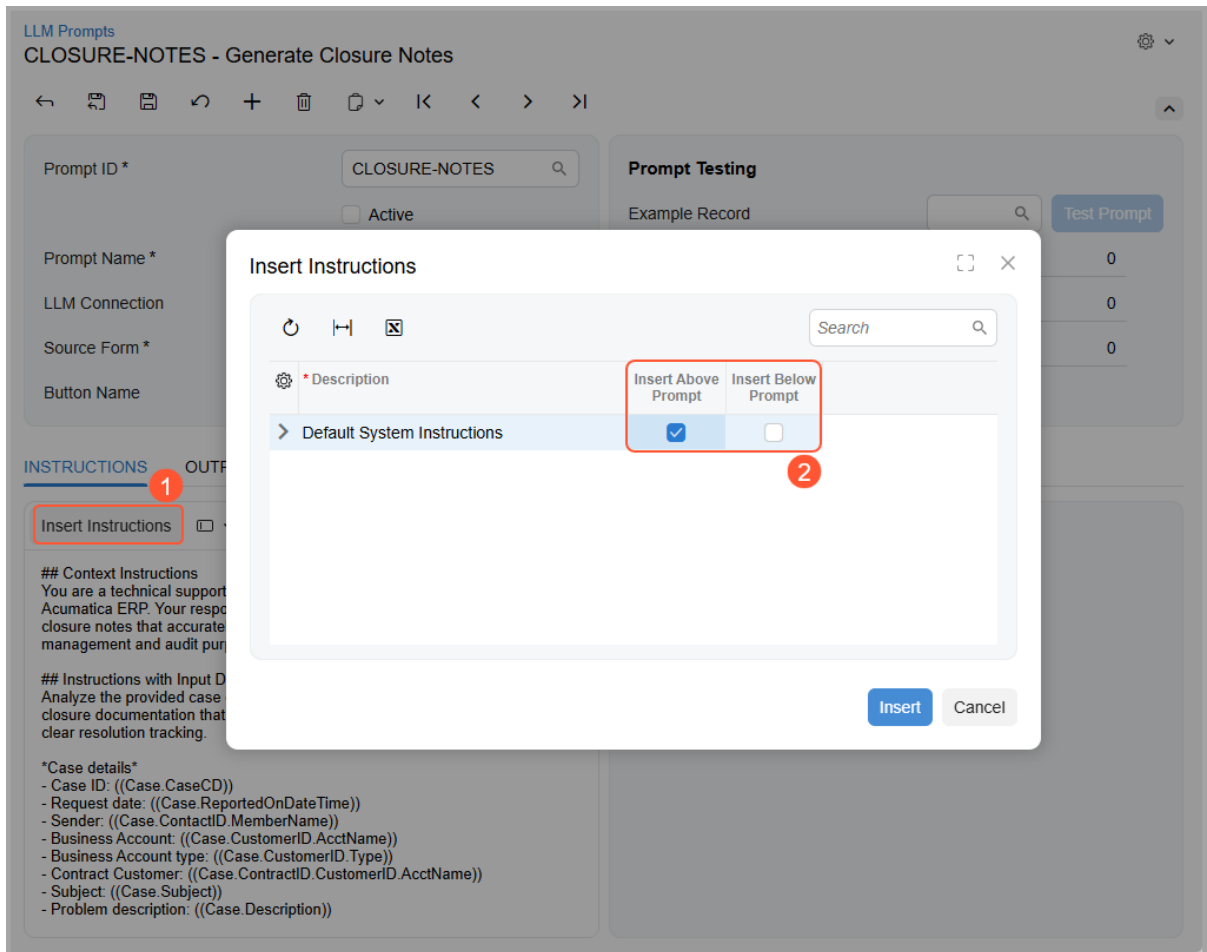


Figure: Insertion of system instructions into a prompt

As a security expert, you need to test the full prompts that the prompt engineer has created. You do this on the [LLM Prompts](#) form. System instructions are a part of the prompt definition and can be tested only in the context of a specific task and set of data.

Keys to Success

To get the most out value from reusable system instructions:

- Store commonly used guidance as reusable system instructions.
- Use default instructions to ensure consistent baseline behavior across prompts.
- Modify system instructions within prompts without changing the original templates.

Learn More

For more information, see [Integration with LLM Providers: Use of System Instructions](#).

CRM: AI-Powered Summaries for Opportunities and Cases

Staying up to date on the progress of the opportunities or cases you manage is essential. In Acumatica ERP 2026 R1, AI-generated summaries for opportunities or cases provide a quick overview of the current situation, helping you refresh key details and focus on next steps without reviewing the entire record.



This functionality is available only if the *AI Studio* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Generating an AI Summary

When you work with an opportunity or case, you can quickly review an AI-generated summary that highlights the most recent and relevant information. To do this, click the **AI Summary** icon in the side panel, which is available:

- In the *Opportunities (CR3040PL)* list of records or on the [Opportunities](#) (CR304000) form for opportunities
- In the *Cases (CR3060PL)* list of records or on the [Cases](#) (CR306000) form for cases

The screenshot displays two sections of a CRM interface. The top section, titled 'Opportunities', features a table with columns for Opportunity ID, Description, Account Name, and Status. The bottom section, titled 'Cases', shows details for case 000160, including Case ID, Status, Business Account, and Contact. Both sections have an 'AI Summary' icon in the right-hand side panel, which is highlighted with a red box.

Opportunity ID	Description	Account Name	Status
OP000413	Concrete Mix Opportunity	Plaza Construction	Open
OP000412	Carton Sealing Unit (Manufacturing)	USA Bartending School	Open
OP000411	Possible Future Service opportunity	Veracity Credit Consultants	New
OP000410	Upgrade to existing hardware	Little, Roob and Trantow	New
OP000409	Looking at new hardware for expansion	Maurices	New
OP000408	Opportunity for MGBASE Estimate	Alta Ace	Open
OP000407	New Manufacturing Opp	Brass Key Bar	New
OP000406	Widget Opportunity for Alta Ace	Alta Ace	Open
OP000405	Food sales for Q4	Chocolate By Design	New

Cases
000160 - Credit Hold inquiry

Case ID: 000160
Status: Pending Customer
Severity: Medium
Priority: High
Business Account: VERACITYCR - Veracity Credit Consult...
Contact: Alan Baumgarten

DETAILS | ADDITIONAL INFO | ATTRIBUTES | ACTIVITIES | RELATED CASES | RELATIONS

Paragraph | Arial | 13 | **B** | *I* | U | ~~S~~ | **A** | Visual

Dear RevisionTwo Accounts Receivable,
Can you provide some details about why my account is on credit hold?
Regards,
Alan B.

Figure: The AI Summary icon in the side panel

Each time you click the icon, the system opens the side panel and starts generating the AI summary by using predefined large language model (LLM) prompts:

- *OPPOSUMMARY* for an opportunity
- *CASE-SUMMARY* for a case

The LLM prompt analyzes the opportunity or case data along with the history of related activities and generates an AI summary with the following details (see below):

- **Sentiment:** The level of customer satisfaction. The system analyzes the customer's wording in the most recent incoming activity, including tone and expressed emotions, and assigns a satisfaction score. The sentiment—shown as an emoji and the corresponding satisfaction level—can be one of the following:

- 😊 *Satisfied*
- 😐 *Neutral*
- 😞 *Unsatisfied*
- **Summary:** A brief summary of recent incoming activities, focusing on customer expectations or concerns and highlighting any important actions to be taken by personnel.
- **Next Steps:** Recommended follow-up actions based on the most recent incoming activity, reflecting what the customer may expect the company to do next.

The screenshot displays the CRM interface with an AI Summary panel for Opportunity OP000412. The main window shows a list of opportunities, with OP000412 selected. The AI Summary panel provides the following information:

- Sentiment:** 😊 Satisfied
- Summary:**
 - The recent activity log shows that the customer is satisfied with the updated specifications and is ready to proceed with a formal quote.
 - The sales team should follow up with the customer to provide the formal quote and address any remaining questions or concerns to move the opportunity forward.
- Next Steps:**
 - Provide the formal quote to the customer
 - Confirm the lead time and delivery timeline
 - Schedule a follow-up call to address any remaining questions
 - Monitor the opportunity to ensure a timely closure
 - Provide the customer with regular updates on the progress

Figure: The AI Summary

Managing LLM Prompts

By default, the *OPPOSUMMARY* and *CASE-SUMMARY* prompts are inactive. If you're an administrator, you can activate a prompt by selecting the **Active** check box on the [LLM Prompts](#) (ML202000) form. An LLM connection is required.

If you want to adjust a prompt to better fit your company's needs, consider creating a copy and making changes to the copy. This approach helps preserve the original prompt, which cannot be restored after modification.

Learn More

For more information about prompts, see [Integration with LLM Providers: General Information](#)

CRM: Tracking a Record's Approval History

Starting in Acumatica ERP 2026 R1, you can view a record's approval history at any time. This gives you a complete picture of who approved or rejected a record, when decisions were made, and which decisions are still in effect.



This functionality is available only if the *Approval Workflow* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

How to View a Record's Approval History

When you work with a record with an approval workflow, you can view its approval history on the **Approvals** tab of the form. (You can find the list of supported forms later in this topic.)

To make it easier to understand **who participated in the approval process** and **what decisions were made**, the names of the following columns on the tab have been updated, as shown in the screenshot below:

- **Assignee ID** to **Assignee**
- **Assigned To** to **Assignee Name**
- **Originally Assigned To** to **Original Assignee**
- **Approved by (ID)** to **Reviewer**
- **Approved by** to **Reviewer Name**
- **Approval Date** to **Date**
- **Status** to **Decision**

Figure: The renamed columns

In addition to the columns shown above, you can display the following columns, which are hidden by default:

- **Description:** The description of the approval request.
- **Amount:** The amount associated with the approval request. The column is updated automatically when you switch between the *Currency* and *Base* views.

On the [Approvals](#) (EP503010) form, the following columns have been renamed:

- **Assigned Approver** to **Assignee**
- **Originally Assigned To** to **Original Assignee**

How the Approval History Is Updated

If a document is again assigned the *On Hold* status after submission, the **Approvals** tab is updated as follows:

- Lines with the *Pending* decision are removed.
- The **Obsolete** check box is selected for lines with past *Approved* or *Rejected* decisions, indicating that those decisions are no longer valid.

When the document is submitted for approval again, the tab shows both obsolete decisions and the current pending decisions, as shown below.

Assignee	Assignee Name	Workgroup	Reviewer	Reviewer Name	Date	Decision	Reason	Obsolete
EP00000003	Layla Beauvoir	Finance				Pending		<input type="checkbox"/>
EP00000003	Layla Beauvoir	Finance	EP00000002	Maxwell Baker	1/19/2026	Rejected		<input checked="" type="checkbox"/>
EP00000003	Layla Beauvoir	Finance	EP00000002	Maxwell Baker	1/16/2026	Approved		<input checked="" type="checkbox"/>
EP00000003	Layla Beauvoir	Finance	EP00000002	Maxwell Baker	1/16/2026	Rejected		<input checked="" type="checkbox"/>
EP00000003	Layla Beauvoir	Finance	EP00000002	Maxwell Baker	1/16/2026	Rejected		<input checked="" type="checkbox"/>

Figure: A purchase order's approval history

In the Acumatica mobile app, past decisions are also marked as *Obsolete*.

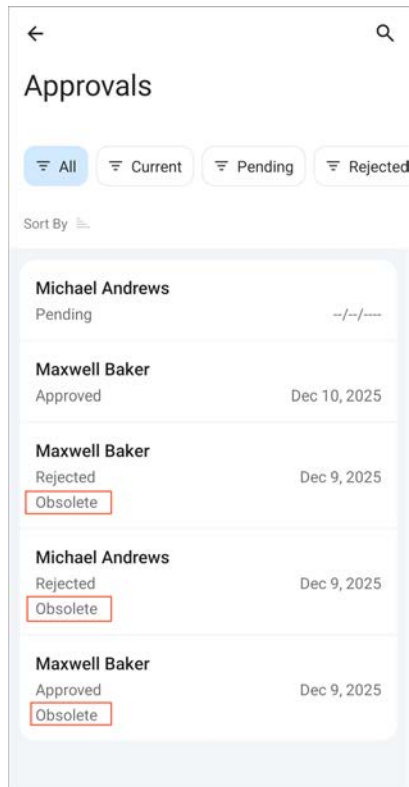


Figure: The approval history in the mobile app

On the **Approvals** tab, you can view all decision lines on the tab or filter them by the following decision types:

- *Approved*: Shows only lines with the *Approved* decision
- *Current* (default): Displays only lines that aren't obsolete
- *Pending*: Displays only lines with the *Pending Approval* decision
- *Rejected*: Shows only lines with the *Rejected* decision

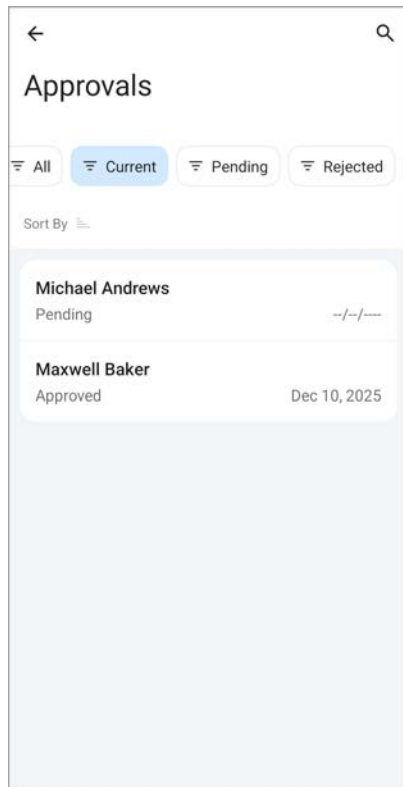


Figure: The current decisions in the mobile app

Where You Can View the Approval History

You can see the approval history for records on the **Approvals** tab of the following forms:

Manufacturing:

- [Engineering Change Request](#) (AM210000)
- [Engineering Change Order](#) (AM215000)

Accounts Payable:

- [Bills and Adjustments](#) (AP301000)
- [Checks and Payments](#) (AP302000)
- [Cash Purchases](#) (AP304000)

Accounts Receivable:

- [Invoices and Memos](#) (AR301000)
- [Payments and Applications](#) (AR302000)
- [Cash Sales](#) (AR304000)

Cash Management:

- [Reconciliation Statements](#) (CA302000)
- [Cash Transactions](#) (CA304000)

Customer Relationship Management:

- [Sales Quotes](#) (CR304500)

Time and Expenses:

- [Expense Claim](#) (EP301000)

- [Expense Receipt](#) (EP301020)
- [Employee Time Cards](#) (EP305000)
- [Equipment Time Card](#) (EP308000)

General Ledger:

- [Journal Transactions](#) (GL301000)

Construction:

- [Daily Field Report](#) (PJ304000)
- [Subcontracts](#) (SC301000)

Projects:

- [Projects](#) (PM301000)
- [Progress Worksheets](#) (PM303000)
- [Project Quotes](#) (PM304500)
- [Cost Projection](#) (PM305000)
- [Cost Projection by Date](#) (PM305500)
- [Project WIP Adjustment](#) (PM305600)
- [Pro Forma Invoices](#) (PM307000)
- [Change Orders](#) (PM308000)
- [Change Requests](#) (PM308500)

Purchase Orders:

- [Purchase Orders](#) (PO301000)

Purchase Requisitions:

- [Requests](#) (RQ301000)
- [Requisitions](#) (RQ302000)

Sales Orders:

- [Sales Orders](#) (SO301000)
- [Invoices](#) (SO303000)

Learn More

For more information about approvals, see:

- [Implementing Approvals](#)
- [Approvals: Reassignment of Approvals](#)

CRM: Duplicate Validation for Customers and Vendors

Keeping customer and vendor information clean and free of duplicates is essential, especially when you work with many records. Starting in Acumatica ERP 2026 R1, you can proactively prevent the creation of duplicate customer or vendor records.



This functionality is available only if the *Duplicate Validation* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Duplicate Validation Rules for Customers and Vendors

When you create or work with customers or vendors on the [Customers](#) (AR303000) or [Vendors](#) (AP303000) form, you can validate them for duplicates.

When you save a new customer or vendor, the system uses the duplicate validation rules defined for the *Account to Account* record pair on the [Duplicate Validation](#) (CR103000) form. If the **Validate on Entry** check box is selected for this pair, the system automatically checks the new record against existing business accounts, customers, and vendors to identify possible duplicates before it saves the record.

If the system finds a possible duplicate, the **Duplicates** tab appears on the [Customers](#) or [Vendors](#) form. Depending on the duplicate validation settings, the system does one of the following:

- Prevents the record from being saved
- Saves the record when you click **Save**

For an existing customer or vendor, you can run duplicate validation manually by clicking **Check for Duplicates** on the More menu of the form.

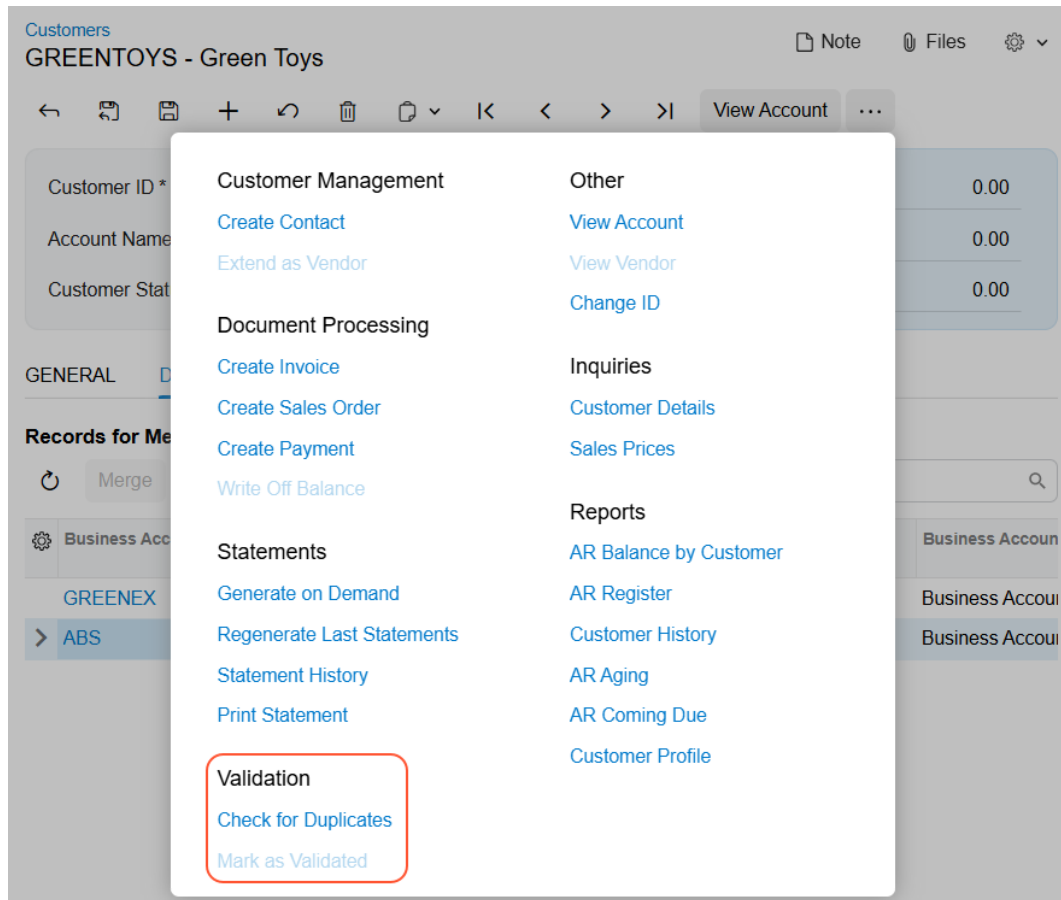


Figure: The duplicate validation commands

Managing Possible Duplicates

When you save the record, you'll see the possible duplicate in the **Records for Merging** table of the **Duplicates** tab of the *Customers* (AR303000) or *Vendors* (AP303000) form.

If you're sure that the new record is a duplicate of an existing one, select the row with the existing record in the table and click **Merge** on the table toolbar.



This button is available only if the selected record has *Business Account* selected in the **Business Account Type** column (see below). If the record has another type, the system displays a warning message (also shown below).

For details about the merging process, see [Record Validation for Duplicates: Merging of Duplicate Records](#).

Customers
GREENFIELD - Green field

Note Files

View Account ...

Customer ID * GREENFIELD

Account Name * Green field

Customer Status * Active

Balance 0.00

Prepayment Balance 0.00

Retained Balance 0.00

GENERAL **⚠️ DUPLICATES** FINANCIAL BILLING SHIPPING LOCATIONS ...

Records for Merging

Merge

Search

Business Account	Phone 1	Email	Account Name	Customer Status	Business Account Type
> GREENEX	+1 212-555-0121	cathy@greenex.example.c...	Greenex C...	Prospect	Business Account
ABS			abs	Prospect	Business Account
⚠️ GREENTOYS			Green Toys	Active	Customer
⚠️ GREEN			Greenex	Active	Customer

You can merge duplicate records only if at least one of them has the Business Account type.

Figure: The warning message on the Duplicates tab

If the record is not a duplicate, click **Mark as Validated** on the More menu of the *Customers* or *Vendors* form. The system inserts the *Validated* status in the **Duplicate** box of the *Business Accounts* (CR303000) form for the business account linked to the customer or vendor.

After you merge or validate all possible duplicates, the **Duplicates** tab no longer appears on the form.

CRM: Enhanced Multiple-Document Email Capabilities

In Acumatica ERP 2025 R2, we introduced the ability of sending multiple documents in a single email. In Version 2026 R1, this functionality has been expanded. You can now attach multiple shipments in a single customer email and multiple purchase orders to one vendor email. In addition, you can have the system combine multiple documents generated in HTML or Excel format into a single file and attach it to the email.

Multiple-Document Emails for Shipments and Purchase Orders

You email shipments to customers on the [Process Shipments](#) (SO503000) form and purchase orders to vendors on the [Print/Email Purchase Orders](#) (PO503000) form. On both of these forms, you can use the following check boxes:

- **Send Documents in One Email:** Select this check box to attach multiple processed documents to a single email and send it to the applicable customer or vendor.
- **Combine Documents into One File:** If you select this check box, the system combines multiple documents into a single file.



You can combine up to 100 documents into a single file. If you select more than 100 documents, the system creates multiple emails, each within this limit.

Print/Email Purchase Orders ⚙️ ▾

↻ ↶ ✎
Process Process All
🔄 ▾ ↔ 🗑️

Action Email Purchase Order ▾

Assigned To Me

Workgroup My

Send Documents in One Email

Combine Documents into One File

☰ All Records ▾
🔍 Search

		Order Nbr.	Date	Status	Employee Name	Owner
<input checked="" type="checkbox"/>		PO002764	12/25/2025	Pending Email	Maxwell Baker	Maxwell Baker
<input checked="" type="checkbox"/>	>	PO002765	12/25/2025	Pending Email	Maxwell Baker	Maxwell Baker

Figure: The check boxes for multiple-document emails

These check boxes are available when you select *Email Shipment* or *Email Purchase Order* in the **Action** box.

New Email Templates for Multiple-Document Emails

To simplify sending multiple shipments or purchase orders in a single email, you can use predefined email templates with the following mailing IDs on the indicated preference forms.

Preference Form	Mailing ID	Document Type	Report
Purchase Orders Preferences (PO101000)	<i>Purchase Order Multiple</i>	<i>Purchase Orders</i>	Purchase Order (PO641000)
Sales Orders Preferences (SO101000)	<i>Shipment Multiple</i>	<i>Shipments</i>	Shipment Confirmation (SO642000)

These email templates define the look and content of the emails to be sent to customer or vendor contacts for the processed shipments and purchase orders.

Additional File Formats for Multiple-Document Emails

Now for each mailing ID listed below, you can also choose HTML or Excel as the document format on the corresponding forms. When the system creates individual documents or combines multiple documents into a single file on processing forms, it uses the selected format.

Mailing ID	Forms
<i>Invoice Multiple</i>	<ul style="list-style-type: none"> • Accounts Receivable Preferences (AR101000) • Customer Classes (AR201000) • Customers (AR303000)
<i>CRQuote Multiple</i>	<ul style="list-style-type: none"> • Customer Management Preferences (CR101000) • Business Account Classes (CR208000) • Business Accounts (CR303000)
<i>PMQuote Multiple</i>	<ul style="list-style-type: none"> • Projects Preferences (PM101000) • Project Templates (PM208000) • Projects (PM301000)
<i>Purchase Order Multiple</i>	<ul style="list-style-type: none"> • Purchase Orders Preferences (PO101000) • Vendor Classes (AP201000) • Vendors (AP303000)
<ul style="list-style-type: none"> • <i>Quote Multiple</i> • <i>Sales Order Multiple</i> • <i>Shipment Multiple</i> 	<ul style="list-style-type: none"> • Sales Orders Preferences (SO101000) • Customer Classes (AR201000) • Customers (AR303000)

Learn More

For more information about email templates, see [Email Templates](#).

CRM: Margin Insight for Opportunities and Sales Quotes

Starting in Acumatica ERP 2026 R1, you can see estimated margins for opportunities and sales quotes. This gives you immediate insight into deal profitability, helping you evaluate discounts during negotiations and assess potential margins earlier in the sales process.

Working with the Estimated Margin

Now when you work with an opportunity or sales quote, you can see the estimated deal margin at a glance. On the [Opportunities](#) (CR304000) and [Sales Quotes](#) (CR304500) forms, the estimated margin amount and percentage are calculated for each line on the **Details** tab. In the Summary area, the total margin values are shown.

The screenshot displays the 'Opportunities' form for '000016 - advertising in hotel'. The 'DETAILS' tab is active, showing various fields for Opportunity ID, Status, Opportunity Class, Stage, Estimated Close, Business Account, Location, Contact, Currency, Owner, and Description. A summary panel on the right shows financial totals: Detail Total (1,000.00), Line Discounts (0.00), Document Discounts (0.00), Tax Total (0.00), Total (1,000.00), Est. Margin (%) (90.00), and Est. Margin Amount (900.00). Below the form, a table lists matrix items with columns for Inventory ID, Description, Free Item, Billing Rule, Warehouse, Quantity, Estimated Duration, UOM, Unit Price, Ext. Price, Est. Margin Amount, and Est. Margin (%). The first row shows 'ADVERT Billboard Advertising' with a quantity of 5.00, duration of 5 h 00 m, unit price of 200.0000, and an estimated margin of 900.00 (90.00%).

Figure: Margin values on the Opportunities form

The system calculates the estimated margin for each line based on the sales amount (without any inclusive taxes) and the cost by using the following formulas:

- **Est. Margin Amount: Amount – Ext. Cost**
- **Est. Margin (%): Est. Margin Amount / Amount * 100**



If the Avalara tax zone is applied, the system recalculates the margin values after you save the record.

In the Summary area, the **Est. Margin Amount** and **Est. Margin (%)** boxes are hidden if the **Manual Amount** check box is selected.

You can also quickly review margin percentages for opportunities or sales quotes by checking the **Est. Margin (%)** column in the Opportunities (CR3040PL) or Sales Quotes (CR3045PL) lists of records.

Sales Quotes

All Records

Search

Quote Nbr.	Opportunity ID	Primary	Description	Status	Est. Margin (%)	Account Name	Currency	Manual Amount	Total	Owner
Q000013	OP000378	<input checked="" type="checkbox"/>	Opportunity group and Opportunity docu...	Draft	59.81	ABC Studios Inc	USD	<input type="checkbox"/>	2,488.05	
Q000012	OP000376	<input type="checkbox"/>	No taxes & no discounts	Draft	61.01	ABC Studios Inc	USD	<input type="checkbox"/>	2,565.00	
Q000011	OP000377	<input checked="" type="checkbox"/>	Margin in imported Opportunity	Draft	62.96	ABC Studios Inc	USD	<input type="checkbox"/>	2,700.00	
Q000010	OP000376	<input type="checkbox"/>	No taxes & no discounts	Draft	61.01	ABC Studios Inc	USD	<input type="checkbox"/>	2,565.00	
Q000009	OP000374	<input checked="" type="checkbox"/>	Widget sale - ship to warehouse	Sent	0.00	USA Bartending School	USD	<input type="checkbox"/>	21,372.62	
Q000008	OP000373	<input checked="" type="checkbox"/>	Labor and materials for new storefront	Approved	0.00	DODO Pizza Inc.	USD	<input type="checkbox"/>	1,680.00	Eric Killi
Q000007	OP000347	<input type="checkbox"/>	Design and architecture project	Draft	0.00	El Centro Books	USD	<input type="checkbox"/>	168,750.00	Maxwell
Q000006	OP000347	<input checked="" type="checkbox"/>	Design and architecture project	Approved	0.00	El Centro Books	USD	<input type="checkbox"/>	174,375.00	Maxwell
Q000005	OP000347	<input type="checkbox"/>	Design and architecture project	Approved	0.00	El Centro Books	USD	<input type="checkbox"/>	180,000.00	Maxwell
Q000004	OP000347	<input type="checkbox"/>	Design and architecture project	Approved	0.00	El Centro Books	USD	<input type="checkbox"/>	202,500.00	Maxwell
Q000003	000094	<input checked="" type="checkbox"/>	Distribution opportunity	Approved	0.00	Pro Tools	USD	<input type="checkbox"/>	155,840.80	Maxwell
Q000002	000094	<input type="checkbox"/>	Distribution opportunity	Approved	0.00	Pro Tools	USD	<input type="checkbox"/>	93,886.00	Maxwell
Q000001	000094	<input type="checkbox"/>	Distribution opportunity	Approved	0.00	Pro Tools	USD	<input type="checkbox"/>	81,899.25	Maxwell

Figure: The column with the margin percentage

CRM: Side Panel with Customer Information

In Acumatica ERP 2026 R1, you can quickly access essential customer information by using the side panel. As you work in the list of customers, you can use the side panel to learn more about any listed customer.

This lets you view key customer details without leaving the list of records to open additional forms.

View the Side Panel for a Customer

In the *Customers (AR3030PL)* list of records, you can drill down into details for any customer in the side panel by clicking the customer and then clicking one of the side panel icons (shown below).

Customer ID	Customer Name	Customer Class	Country	City	Currency ID	Terms	Customer Status	State
ABAKERY	Allen's Bakery	DEFAULT	US	New York	USD	30D	Active	NY
BISCCITY	Biscuit City Café	DEFAULT	US	New York	USD	30D	Active	NY
BLUECAFE	Blue Cafe	DEFAULT	US	Binghamton	USD	310N30	Active	NY
CAKEADO	Cakeado Cafe	DEFAULT	US	New York	USD	30D	Active	NY
CANDYY	Candy Cafe	DEFAULT	US	New York	USD	30D	Active	NY
CITRUS	Citrus Store	DEFAULT	US	Middletown	USD	30D	Active	NY
COFFEESHOP	FourStar Coffee & Sweets S...	DEFAULT	US	New York	USD	30D	Active	NY
DELIENERGY	Delicious Energy Restaurant	DEFAULT	US	New York	USD	30D	Active	NY

Figure: The side panel icons on the Customers list of records

Clicking the icon opens the corresponding tab, which displays a particular type of information about the selected customer.

The Customers Tab

This tab shows the customer's settings on the *Customers (AR303000)* form.

Customer ID	Customer Name	Customer Class
ABAKERY	Allen's Bakery	DEFAULT
BISCCITY	Biscuit City Café	DEFAULT
BLUECAFE	Blue Cafe	DEFAULT
CAKEADO	Cakeado Cafe	DEFAULT
CANDYY	Candy Cafe	DEFAULT
CITRUS	Citrus Store	DEFAULT
COFFEESHOP	FourStar Coffee & Sweets S...	DEFAULT
DELIENERGY	Delicious Energy Restaurant	DEFAULT
EASYDINER	EasyDiner Co.	INTLCA
ECOMGUEST	eCommerce Guest Customer	ECCUSTON
EQUGRP	The Equity Group Investors	GOVERNMI
FOODCLVR	Food Clever	DEFAULT
FRBUN	Cafe French Bun	DEFAULT

Field	Value
Customer ID	ABAKERY
Account Name *	Allen's Bakery
Customer Status *	Active
Balance	498.70
Prepayment Balance	0.00
Retained Balance	0.00
Legal Name *	Allen's Bakery
Customer Class *	DEFAULT - Lo...
Owner	
Ext. Ref. Nbr.	
Name	Beverly Hall
Job Title	Pastry Chef
Email	beverly@abakery
Business 1	+1-212-555-0101
Cell	
Country *	US - United St...

Figure: Customer settings

The Contacts Tab

This tab gives you a quick look at the selected customer's contacts and their basic data.

Customer ID	Customer Name	Customer
ABAKERY	Allen's Bakery	DEFAULT
BISCCITY	Biscuit City Café	DEFAULT
BLUECAFE	Blue Cafe	DEFAULT
CAKEADO	Cakeado Cafe	DEFAULT
CANDYY	Candy Cafe	DEFAULT
CITRUS	Citrus Store	DEFAULT

Contact	Job Title	Email	Phone 1
Beverly Hall	Pastry Chef	beverly@abakery.example.com	+1-212-555-0101

Figure: The customer's contacts

The Documents Tab

You can use the **Documents** tab to view balances, open AR documents, sales orders, quotes, and opportunities of the selected customer. The tab displays *Documents by Customer (AR3013DB)* dashboard with the following widgets and lists of records:

- **Balance:** The total amount of open AR documents, reduced by payments, prepayments, and credit memos. The system calculates this amount on the *Customer Summary (AR3030SP)* generic inquiry form.
- **Overdue:** The total amount of overdue AR documents, including credit memos and documents with a due date in the past. The system calculates this amount on the *Customer Summary* generic inquiry form.
- **Open Invoices and Memos:** The list of invoices and payments with the *Open* status. You can also view these documents on the *Open Customer Documents (AR3031SP)* generic inquiry form.
- **Open Sales Orders:** The list of sales orders with the *Open* status. You can also view them on the *All Sales Orders (SO3011SP)* generic inquiry form.
- **Sales Quotes:** A list of the customer's sales quotes with the *Draft*, *Sent*, or *Pending Approval* status. You can also view these quotes on the *Sales Quotes (CR3045SP)* generic inquiry form.
- **Open Opportunities:** A list of the customer's opportunities with the *Open* status. You can also view these opportunities on the *All Opportunities (CR3041SP)* generic inquiry form.

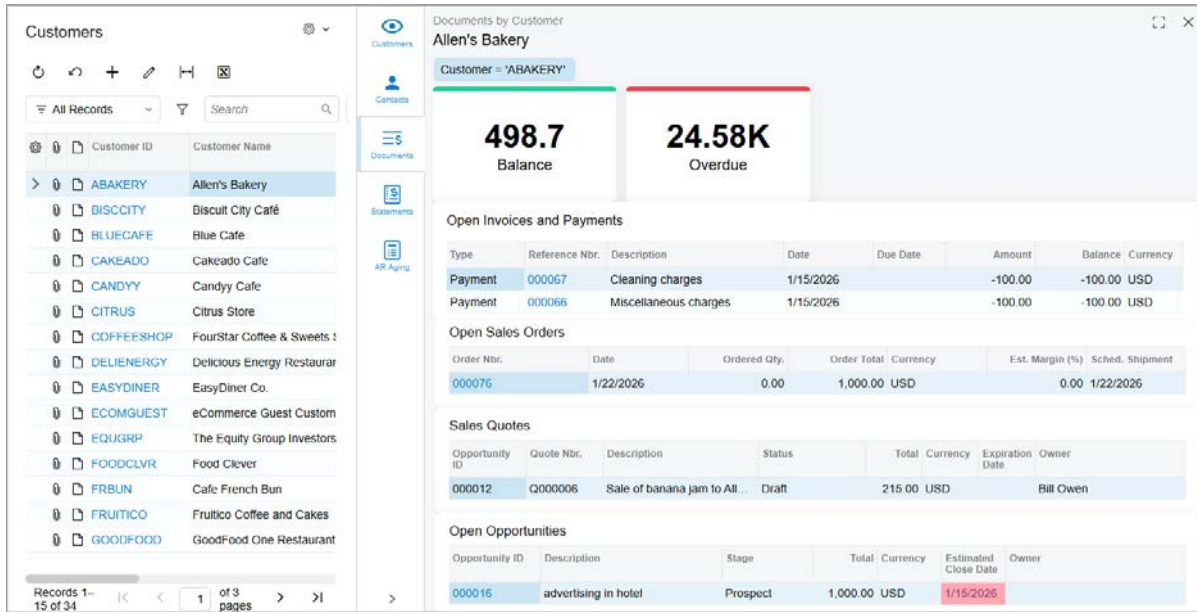


Figure: The customer's documents and balances

The Statements Tab

This tab shows a list of customer statements.

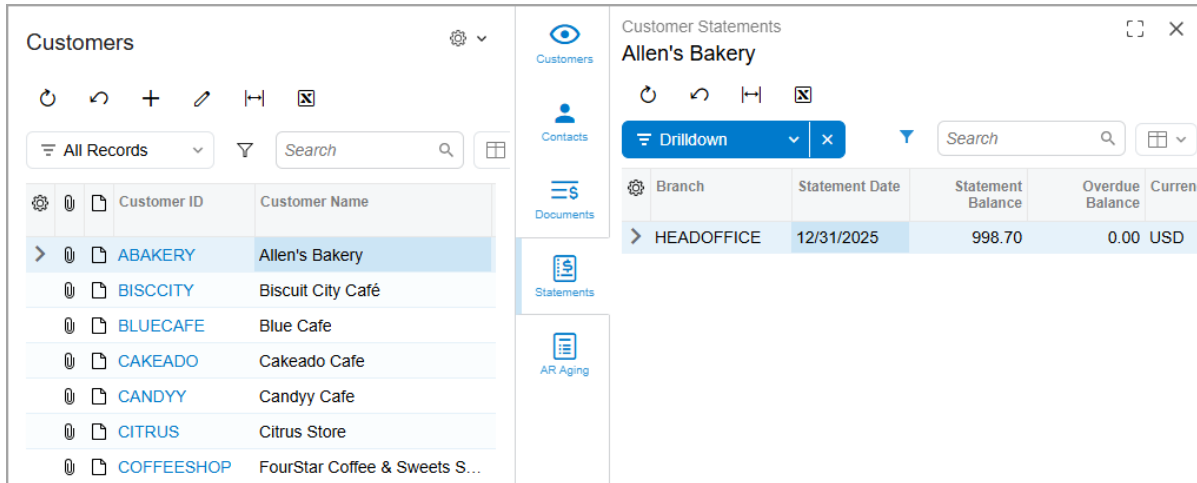


Figure: The customer's statements

The AR Aging Tab

The **AR Aging** tab helps you understand how the selected customer's AR documents are distributed across aging periods. The tab shows the *AR Aging by Customer (AR3014DB)* dashboard with the following table and widgets:

- **Overdue 0-30 Days:** The total overdue amount for open AR documents that are up to 30 days past due.
- **Overdue 30-60 Days:** The total overdue amount for open AR documents that are more than 30 and up to 60 days past due.
- **Overdue 60-90 Days:** The total overdue amount for open AR documents that are more than 60 and up to 90 days past due.
- **Overdue 90+ Days:** The total overdue amount for open AR documents that are more than 90 days past due.

- **AR Aging:** The list of open AR documents that are overdue, distributed across aging periods.

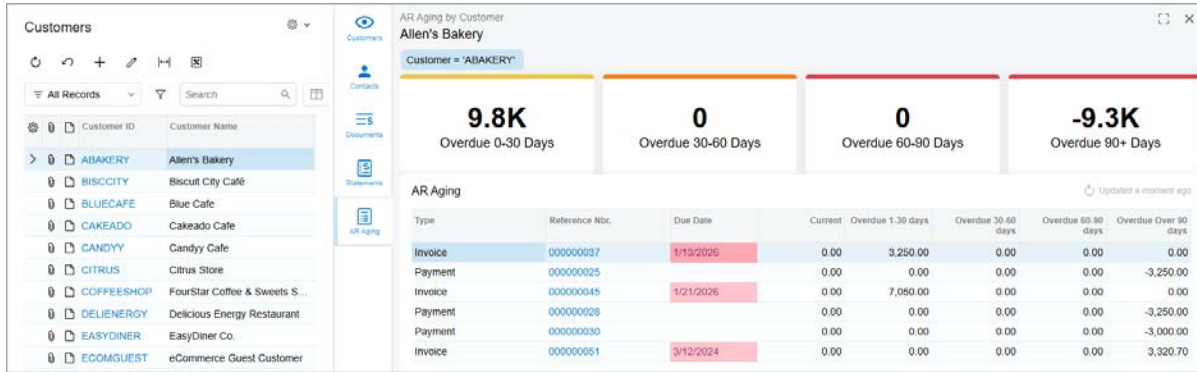


Figure: The customer's AR aging overview

CRM: Side Panels with Vendor, Salesperson, and Employee Information

In Acumatica ERP 2026 R1, you can quickly access essential information about vendors, salespeople, or employees in the side panel. As you work with the list of records, you can use the side panel to learn more about any listed vendor, salesperson, or employee.

This lets you view key details about any record without leaving the list of records to open additional forms.

How to View Information on the Side Panel

In any of the following lists of records, you can drill down into details for any vendor, salesperson, or employee in the side panel:

- *Vendors (AP3030PL)*
- *Salespersons (AR2050PL)*
- *Employees (EP2030PL)*

To do this, click a record and then click one of the side panel icons. This opens the corresponding tab, which displays a particular type of information about the selected record.

Viewing the Side Panel for a Vendor

Now you can access key vendor information by using the side panel on the *Vendors (AP3030PL)* list of records, which has the side panel icons shown below.

Vendor	Vendor Name	Vendor Class
ACMEDO	Acme Doors & Glass	SUBCON
ALLFRUITS	All Fruits Mall	DEFAULT
ARCINS	Arc Insurance	DEFAULT
AVALARA	Avalara Tax Agency	TAXAGENCY
BLUELINE	Blueline Advertisement	DEFAULT
CARTRIDGE	Cartridge World Inc.	INTLCA

Figure: The side panel icons on the Vendors list of records

Depending on the selected tab, you can view the vendor's settings, AP document information, or provided goods and services in the side panel.

The Vendors Tab

This tab shows the vendor’s settings on the *Vendors* (AP303000) form.

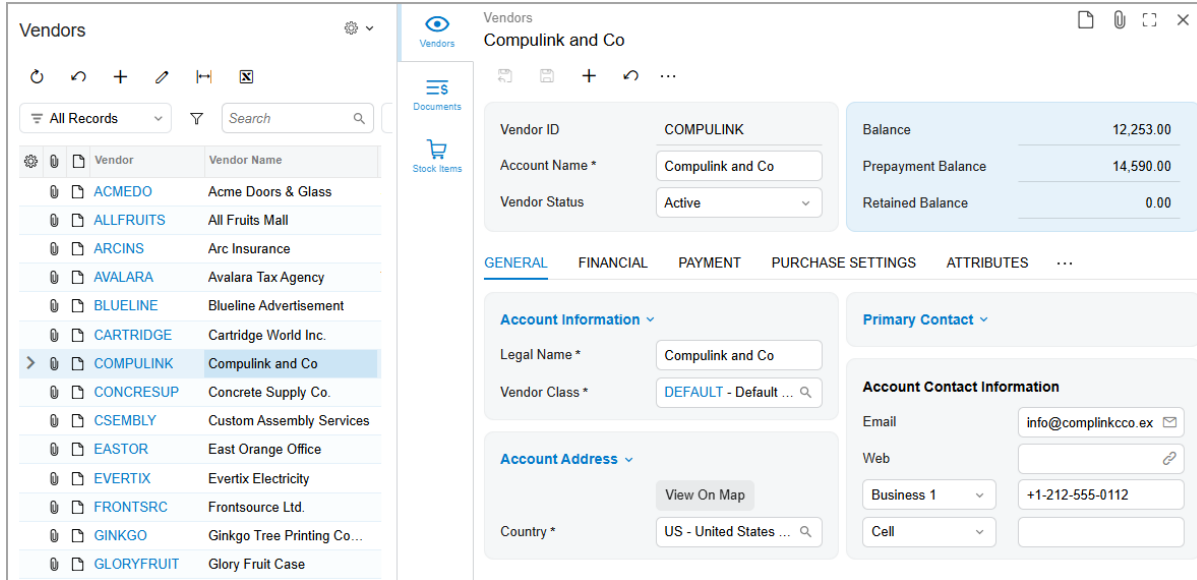


Figure: The settings of the vendor

The Documents Tab

You use the **Documents** tab to view the selected vendor’s balances and open documents. The tab displays the *Documents by Vendor* (AP3013DB) dashboard with the following widgets and lists of records:

- **Balance:** The total amount of the vendor’s open bills, reduced by adjustments. The system calculates this amount on the *Vendor Summary* (AP0008DB) generic inquiry form.
- **Overdue:** The total amount of the vendor’s bills past due, reduced by adjustments. The system calculates this amount on the *Vendor Summary* generic inquiry form.
- **Open Bills and Payments:** The list of the vendor’s bills and payments with the *Open* status. You can also view these documents on the *Documents by Vendors* (AP3010SP) generic inquiry form.
- **Open Purchase Orders:** The list of the vendor’s purchase orders with the *Open* status. You can also view them on the *Open Purchase Orders by Vendors* (PO3011SP) generic inquiry form.

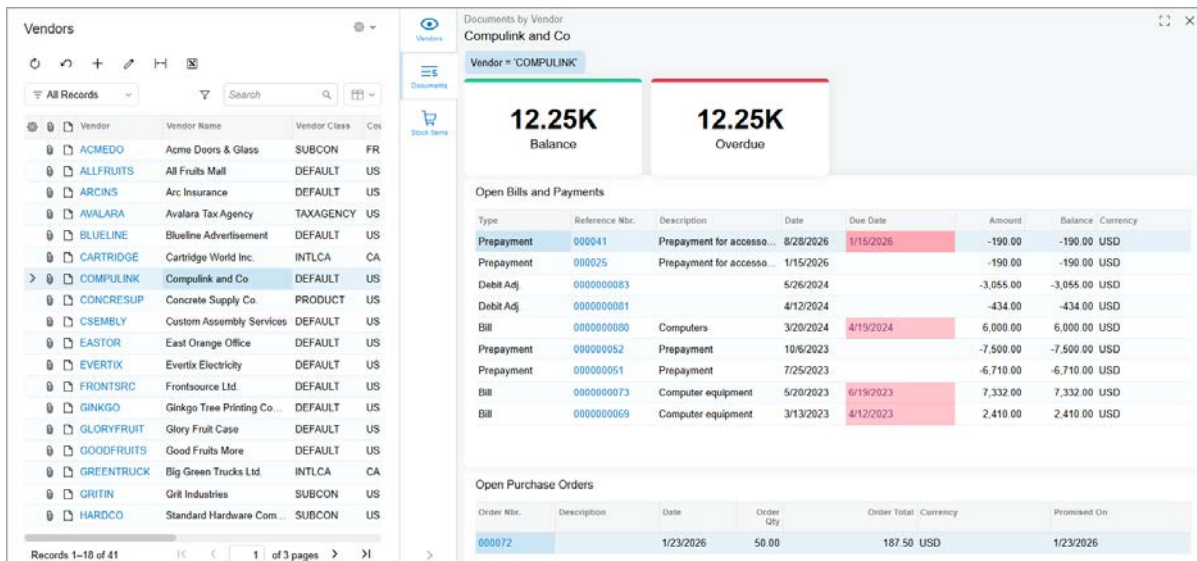


Figure: The vendor’s balances and documents

The Stock Items Tab

This tab displays the list of goods and services offered by the vendor on the *Stock Items by Vendor (IN3010SP)* generic inquiry form.

Vendor	Vendor Name	Vendor Class
ACMEDO	Acme Doors & Glass	SUBCON
ALLFRUITS	All Fruits Mall	DEFAULT
ARCINS	Arc Insurance	DEFAULT
AVALARA	Avalara Tax Agency	TAXAGENCY
BLUELINE	BlueLine Advertisement	DEFAULT
CARTRIDGE	Cartridge World Inc.	INTLCA
COMPULINK	Compulink and Co	DEFAULT

Inventory ID	Description	Last Vendor Price	Currency ID
COMPCHAIRM	High-back mesh computer chair with adju...	0.0000	USD
COMPCHAIR	High-back computer chair with adjustable...	0.0000	USD

Figure: The vendor's goods and services

Viewing the Side Panel for a Salesperson

If you work with salespeople, you can use the side panel on the *Salespersons (AR2050PL)* list of records, which has the icons shown below, to quickly view the selected salesperson's details and sales deals.

Salesperson ID	Name	Is Active
MG	Matt Glenstone	✓

Salesperson...

Sales

Figure: The side panel icons on the Salespersons list of records

The Salespersons Tab

On this tab, you can view the *Salespersons (AR205000)* form, which has the salesperson's customer list and basic settings.

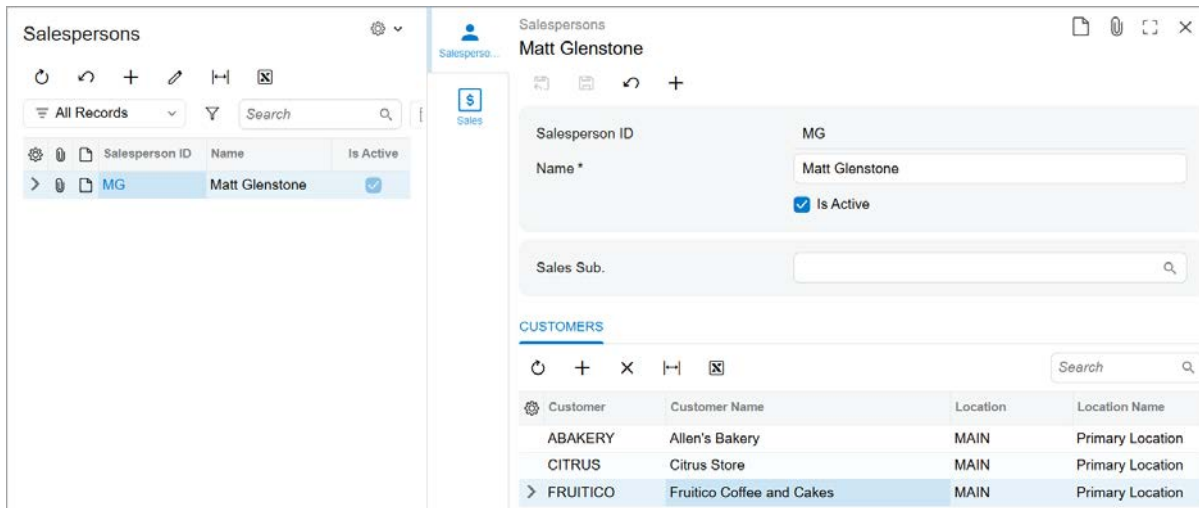


Figure: The salesperson’s customers

The Sales Tab

This tab displays the *Sales by Salesperson (AR6730SP)* generic inquiry form. You can specify a date range and view either all sales documents related to the salesperson (as shown below) or only their paid invoices.

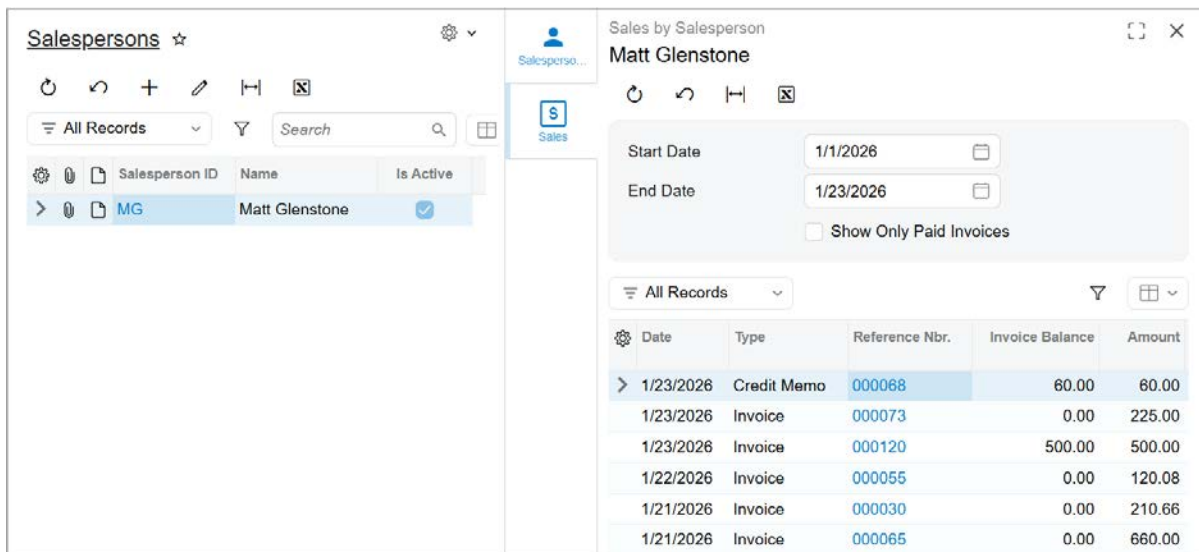


Figure: The salesperson’s sales documents

Viewing the Side Panel for an Employee

You can view any employee’s details and compensation information in the side panel of the *Employees (EP2030PL)* list of records, which has the icons shown below.

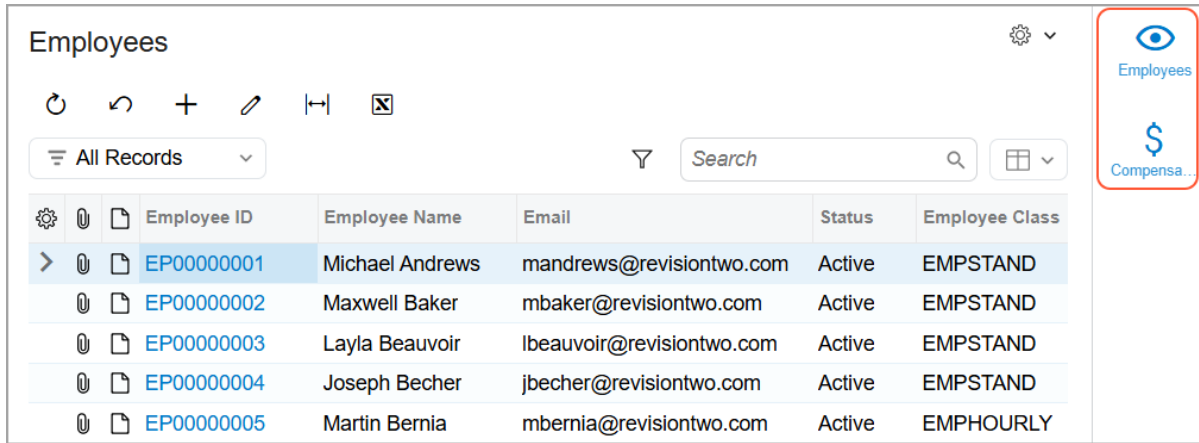


Figure: The side panel icons on the Employees list of records

The Employees Tab

This tab displays the employee’s settings on the *Employees* (EP203000) form.

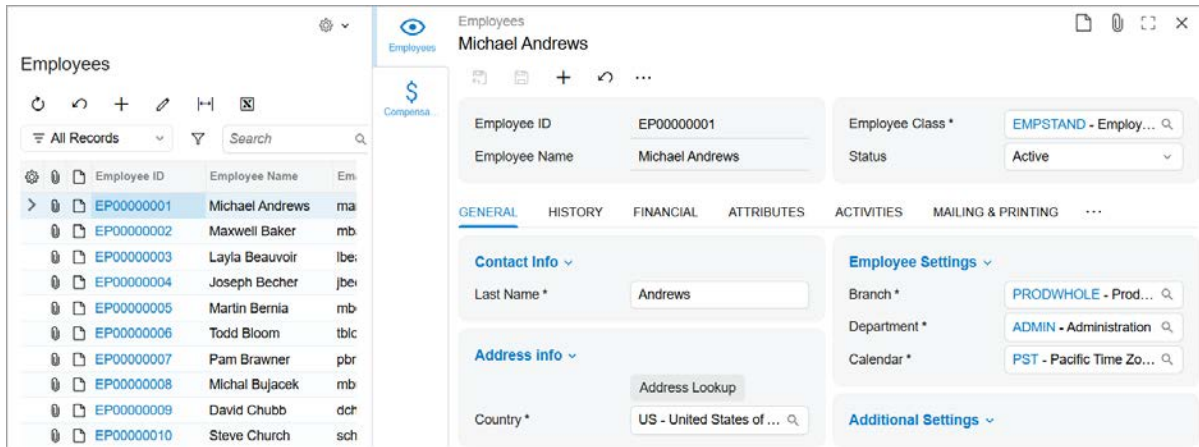


Figure: The employee’s settings

The Compensation Tab

On this tab, you can quickly access the *Employee Compensation (PR2030SP)* generic inquiry form, which shows employee’s compensation details.

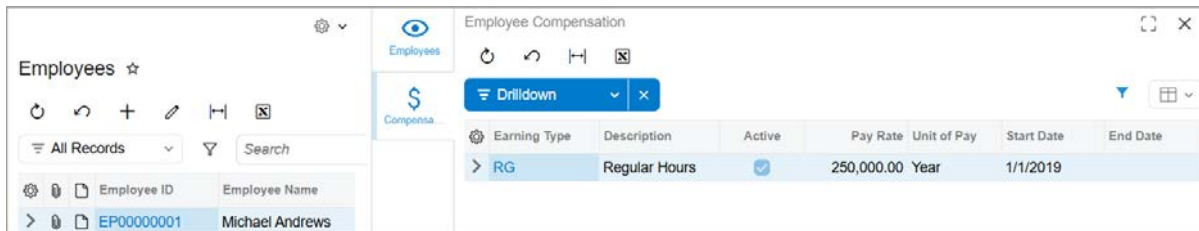


Figure: The employee’s compensation details

CRM: Work Smarter with the Activity Stream

When sales, marketing, and support teams manage customer interactions spanning many conversations and follow-up activities, it can be hard to quickly zero in on the information that matters. Starting in Acumatica ERP 2026 R1, you can use the Activity Stream to view all activities related to the opportunity, sales quote, case, or contact you're working with. With the Activity Stream's clear, readable layout, you can review all activities, drill down on any activity to learn more, and find what you need faster.

Read on to explore the new capabilities.

How You'll Benefit

- **Understanding of the record's full context:** By seeing the key data of all its related activities in a single view with a clean layout, you can grasp the full picture quickly.
- **More efficient daily work:** From the Activity Stream, you can open multiple activities in parallel to view their complete data. And you can use searching, filtering, and sorting to find what you're looking for—especially helpful if the record has many activities.
- **Greater focus on important details:** Each activity tile highlights essential details and uses icons to indicate the activity type, helping you quickly decide which activities to review in more detail.

Exploring the Activity Stream

The Activity Stream provides a consolidated view of all activities related to the record you're working with. Activities are displayed in a consistent tile-based layout that makes it easy to scan activities and get more information on any activity in a few clicks.

You can open the **Activity Stream** side panel tab by clicking the **Activities** icon in the side panel of the following forms:

- [Cases](#) (CR306000)
- [Contacts](#) (CR302000)
- [Opportunities](#) (CR304000)
- [Sales Quotes](#) (CR304500)

While the new Activity Stream is available, the **Activities** tab on these forms remains available for backward compatibility.

The screenshot displays the CRM interface for an opportunity record. The main window shows the opportunity details for 'Equipment for a new cafe' (Opportunity ID: 000002). The status is 'Open', and the business account is 'ABCSTUDIOS - ABC Studios Inc.'. The contact is 'Philips, Trevor' and the owner is 'Baker Maxwell, Dr.'. The description is 'Equipment for a new cafe'. The financial summary shows a detail total of 0.00, with no discounts or taxes. The activity stream on the right shows a list of activities and a detailed view of a selected activity. The activity list includes a completed phone call, an open email, an open event, and an open task. The detailed view shows the content of the selected phone call, including the subject 'Purchase of new equipment for a new cafe' and the body text.

Figure: The Activity Stream side panel tab

On the side panel tab—that is, the Activity Stream—activities related to the selected record appear as a collection of activity tiles. In the Activity Stream, you can:

- View key information about each activity
- Search in all activities by using the Search box
- Filter activities by using the Quick Filter menu, including filtering activities with attachments by selecting *Files* (Item 1 below)
- Sort activities by using the predefined sort options, including sorting by start date (Item 2)
- Create a new activity by using the toolbar command (Item 3)
- Refresh the list of activities

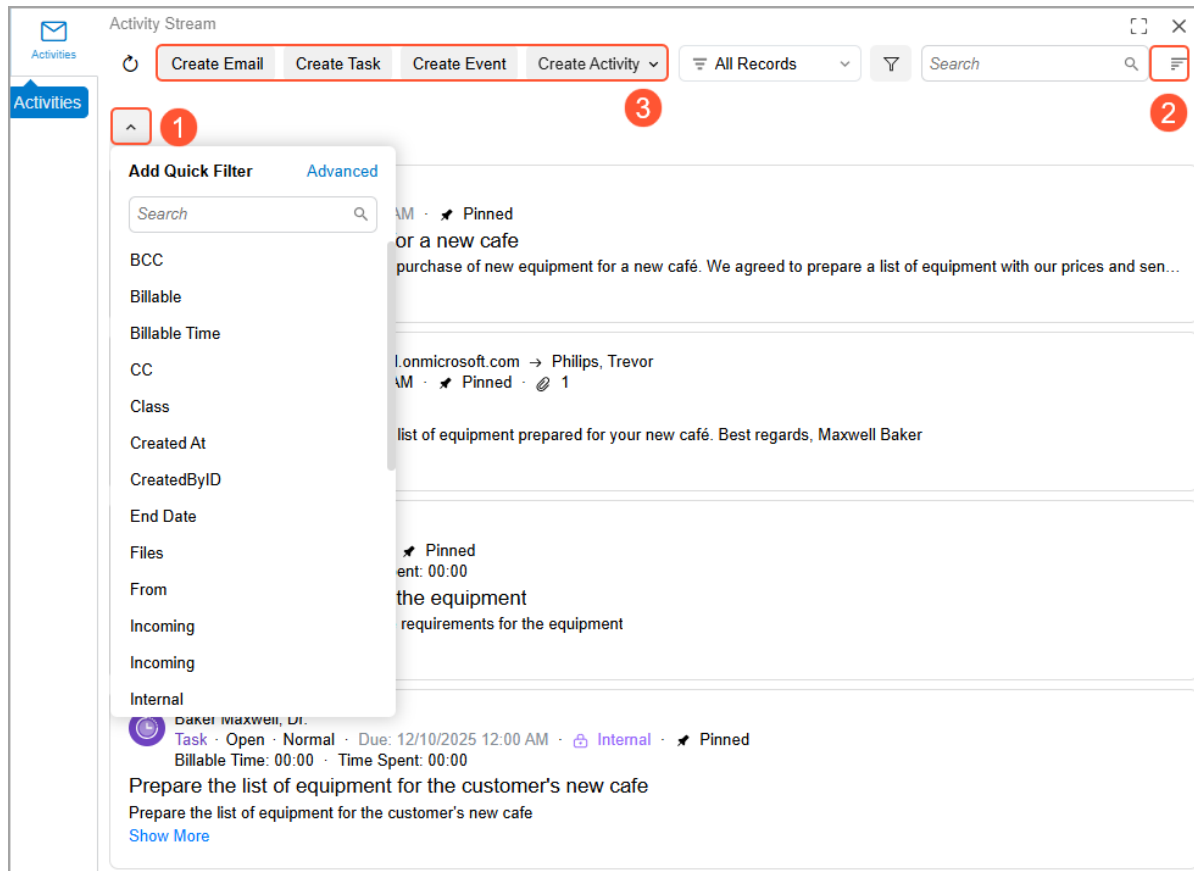


Figure: The toolbar options

Working with Activity Tiles

When you open the Activity Stream, all activity tiles are **collapsed** by default so that you see the most important activity details at a glance:

- In the tile menu, a set of buttons appears when you hover over the activity (Item 1 below); the available set of buttons depends on the activity's type.
- In the tile header, you'll see an icon that indicates the activity type and a brief set of key activity details in one line. (The specific details depend on the activity type.)
- The activity's subject or summary is shown below the header.
- In the bottom of the tile, you'll see the brief activity description (in one line).

You can expand the tile by clicking **Show More** (Item 2).

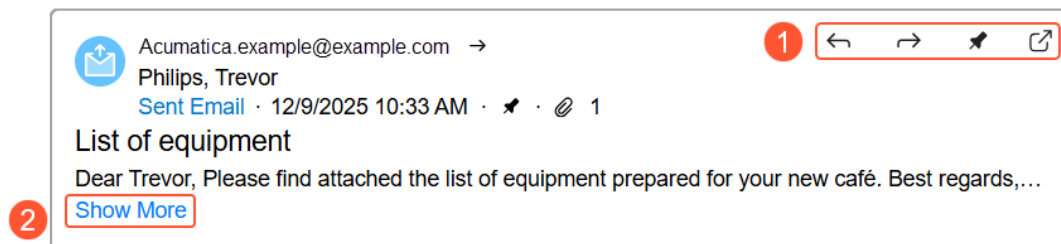


Figure: The collapsed activity tile

An expanded activity tile shows all activity details, including the following:

1. The full set of activity details
2. The full activity description
3. The attachments that appear under the subject or summary, along with each attachment's icon, file name, and extension (Item 1 below)



The expanded activity tile can show up to 10 attachments. If an activity contains more than 10 attachments, you can view all them on the activity's data entry form.

You can collapse the tile by clicking **Show Less** (Item 2).

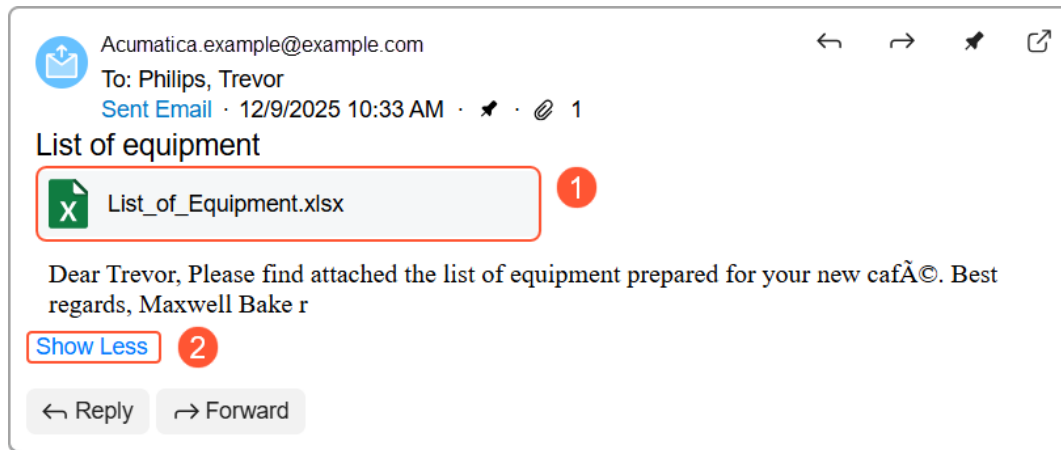


Figure: The expanded activity tile

If you reply to or forward an email activity, the related email messages are grouped into conversational threads. When the tile is expanded, you can view the thread icon (). Click it to see the email thread.

Activity Stream

Activities

Acumatica.example@example.com
 To: Michael Andrews, Mr.
 Sent Email · 12/10/2025 9:56 AM · 1

FW: List of equipment

List_of_Equipment.xlsx

Dear Michael,

Please review the list of equipment for the new cafe.

Thank you in advance.

...

From: Acumatica.example@example.com
Sent: 12/9/2025 10:33:49 AM
To: "Philips, Trevor" <mallevlaz@mail.ru>
Subject: List of equipment

Dear Trevor,

Please find attached the list of equipment prepared for your new cafÃ©.

Best regards,

Maxwell Baker

Show Less

← Reply → Forward

Figure: The thread icon

Adjusting Activity Type Indicators

If you're an administrator, you can make activity types easy to distinguish at a glance by assigning a background color to each activity type's icon in the **Color** column of the [Activity Types](#) (CR102000) form.

The list of icons (in the **Image** column) has also been updated to make them look more modern and easier to recognize.

Activity Types ⚙️

↻ 📄 ↶ + × ⏪ ⏩

Class	Type ID	Description	Active	System Default	Originated By	Image	Color	Internal	Track Time and Costs	Incoming	Outgoing
Event	AA	Event	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ERP Users	📅	#E14251	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	AE	Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Portal Users	✉️	#007ACC	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	ASE	System Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System	✉️	#007ACC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Activity	ASI	System Message	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System	🔔	#FF7E29	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Task	AT	Task	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ERP Users	🕒	#6F42C1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity	C	Chat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ERP Users	💬	#17A2B8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity	D	Drawing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ERP Users	📐	#007ACC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity	E	Appointment	<input type="checkbox"/>	<input type="checkbox"/>	ERP Users	📅	Yellow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Activity	EN	Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Portal Users	📝	#FFC107	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Activity	ES	Escalation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ERP Users	📢	#FB7CA9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity	M	Message	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ERP Users	📩	#6699CC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Figure: Color codes for activity types

The selected icon is shown in both the Modern UI and the Classic UI.

DeviceHub: Improved Print Queue Management

Companies that process a high volume of print jobs need a fast and reliable way to monitor and control the print queue. Acumatica ERP 2026 R1 introduces the [Manage Print Queue](#) (SM206501) form, a centralized location for managing DeviceHub print jobs. With this form, administrators can:

- Organize and prioritize print jobs
- Monitor the queue for stuck print jobs and errors
- Delete, update, or reprint jobs manually or on a schedule



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

Job ID	Description	Report ID	DeviceHub ID	Printer	Created By
20	SO641010	SO.64.10.10	DH1	PDF	gibbs
19	SO641010	SO.64.10.10	DH1	PDF	gibbs
18	SO641010	SO.64.10.10	DH1	PDF	gibbs
17	SO641010	SO.64.10.10	DH1	PDF	gibbs
16	SO641010	SO.64.10.10	DH1	PDF	gibbs
15	SO641010	SO.64.10.10	DH1	PDF	gibbs
14	SO641010	SO.64.10.10	DH1	PDF	gibbs
13	SO641010	SO.64.10.10	DH1	PDF	gibbs

Figure: The Manage Print Queue form

In the **Action** box, you select what happens to processed print jobs when you click **Process** or **Process All**:

- *Delete*: Deletes the print jobs.
- *Reprint*: Resends the print jobs to DeviceHub.
- *Update Print Jobs*: Updates DeviceHub IDs and printers with the **Change DeviceHub To** and **Change Printer To** settings in the Selection area.

You can use Acumatica ERP's automation schedules to delete print jobs automatically. This approach will help you reduce the unnecessary data in the application database and increase the operational efficiency of printing via DeviceHub.

Learn More

For more information about DeviceHub, see [Implementing DeviceHub](#) and [Automated Processing: General Information](#).

DeviceHub: Support for the Contract-Based API

In Acumatica ERP 2026 R1, DeviceHub has gained support for the contract-based API for printing, scanning, and measuring. The contract-based API is the standard API used for dependable integration with Acumatica ERP.



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

Benefits of Contract-Based API Support

Because DeviceHub now uses the contract-based API, administrators will find it easier to maintain the integration:

- **More predictable behavior:** A stable contract mitigates the risk that Acumatica ERP upgrades will interrupt DeviceHub-dependent processes.
- **Fewer integration mismatches:** Clearly defined requests and responses ensure that DeviceHub and Acumatica ERP stay in sync, reducing the risk of integration errors and troubleshooting efforts.

Updated Printing via DeviceHub

In Acumatica ERP 2026 R1, DeviceHub processes print jobs differently. Previously, each time DeviceHub processed a print job (including reprints), it requested that Acumatica ERP generate a printable version of a document. Now when you print a document, Acumatica ERP generates the printed document and attaches it directly to the print job. DeviceHub then uses the attached file on the first run and on reprints. As a result, the printed document always has the same details.

If you want to review the printed document, you can click the attachment (Item 1 below) in the line of the print job on the [Print Jobs \(SM206500\)](#) form. In the **Files** dialog box, which opens, you click the file name (Item 2), which is a link to the generated PDF file. The system opens it in a new browser window.

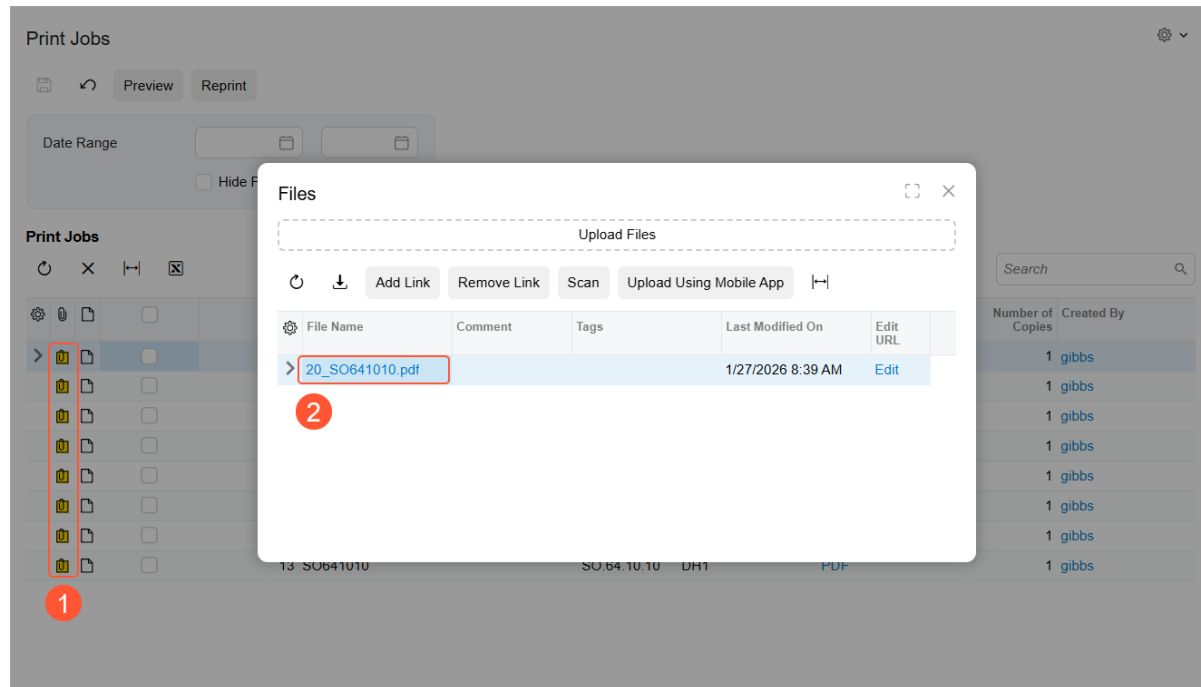


Figure: The printed form attached to a print job

The new **Create Print Job per Document** check box (shown below) has been added to the printing settings of DeviceHub on the following forms:

- [Print Production Orders](#) (AM511000)
- [Print/Release Dunning Letters](#) (AR522000)
- [Print/Email AR Documents](#) (AR508000)
- [Print/Email Lien Waivers](#) (CL502000)
- [Print/Email Sales Quotes](#) (CR504545)
- [Print/Email Project Quotes](#) (PM504545)
- [Print/Email Purchase Orders](#) (PO503000)
- [Print/Email Orders](#) (SO502000)
- [Process Shipments](#) (SO503000)

If you select this check box, the system creates a separate print job for each document sent to DeviceHub from the processing form. You can use this check box, for instance, to prevent two different documents from being printed on opposite sides of the same sheet. If the check box is cleared and you select multiple documents, the system may combine them into a single print job, depending on the currently selected processing form.

Previously, you could clear the **Combine every x documents when printing** check box in DeviceHub's **Configuration** window to yield similar results. This check box has been removed.

The screenshot shows the 'Print/Email Orders' interface. On the right side, under the 'Print with DeviceHub' section, the 'Create Print Job per Document' checkbox is checked and highlighted with a red box. Other options include 'Print with DeviceHub' (checked), 'Define Printer Manually' (unchecked), and 'Number of Copies' (set to 1). Below the settings is a table of records.

	Order Type	Order Nbr.	Description	Customer Order Nbr.	Status	Requested On	Sched. Shipment	Customer
<input type="checkbox"/>	SO	000013	Sale of 54 pounds of apples and 43 poun...		Completed	12/3/2025	12/3/2025	GOODFOOD
<input type="checkbox"/>	SO	000014	Sale of 67 pounds of apples		Completed	12/6/2025	12/6/2025	HMBAKERY
<input checked="" type="checkbox"/>	SO	000015	Sale of 75 pounds of oranges		Completed	12/10/2025	12/10/2025	GOODFOOD
<input checked="" type="checkbox"/>	SO	000016	Sale of 48 pounds of apples and 56 poun...		Completed	12/13/2025	12/13/2025	HMBAKERY
<input checked="" type="checkbox"/>	SO	000017	Sale of 64 pounds of apples and 44 poun...		Completed	12/17/2025	12/17/2025	GOODFOOD
<input checked="" type="checkbox"/>	SO	000018	Sale of 51 pounds of apples		Completed	12/20/2025	12/20/2025	HMBAKERY
<input checked="" type="checkbox"/>	SO	000019	Sale of 76 pounds of oranges		Completed	12/24/2025	12/24/2025	GOODFOOD

Figure: The Create Print Job per Document check box

Learn More

For more information about DeviceHub, see [Implementing DeviceHub](#).

Field Service: Attribute-Based Pricing for Lot- and Serial-Tracked Items

Acumatica ERP now extends attribute management for **lot- and serial-tracked items** to service management. Starting in Version 2026 R1, attribute-based pricing is automatically applied to the units of lot- and serial-tracked items selected in service orders and appointments. With these enhancements, your technicians and dispatchers can confidently select the most appropriate units for each service—knowing that the correct price will be applied.



This functionality is available if both the *Lot/Serial Attributes* and *Lot and Serial Tracking* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

Example: Enhanced Maintenance Accuracy with Lot and Serial Attributes

Imagine that your company provides regular maintenance for equipment installed at customer sites. During these maintenance activities, technicians often replace components, such as compressors or controllers, that are serialized, meaning that they're tracked by serial number.

Some of these replacement components have properties—such as model, type, replacement frequency, or warranty—that remain consistent throughout their lifecycle. These properties are defined as **attributes** in the system and recorded while receiving the items into inventory.

When maintenance is scheduled, a designated employee creates a **service order**, specifying the required services and stock items. The employee selects the necessary **serialized components** based on their defined attributes to ensure compatibility with the customer's equipment. The attributes determine the **sales price** that's automatically applied in the service order. When an **appointment** is created from the service order, it already includes the specific serialized item assigned for use during the maintenance visit—at the correct attribute-based price.

Setting Up Lot and Serial Attributes



This section summarizes the setup steps you need to perform before using lot and serial attributes in service documents. This setup process is also described in Acumatica ERP inventory and order management documentation. We've included the information here as a reminder of how to set up attributes for lot or serial items and specify their values when the items are received.

To start using attributes, first create them on the [Attributes](#) (CS205000) form—or verify that they already exist. Then add the attributes to a lot or serial class on the [Lot/Serial Classes](#) (IN207000) form. You can add or delete attributes if the class has these settings:

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

For a stock item of this lot or serial class, these class attributes are automatically added to the **Lot/Serial Attributes** table on the **Attributes** tab of the [Stock Items](#) (IN202500) form. Here, you can review and modify the list of attributes.

Now the values of these attributes can be recorded for each unit of the lot- or serial-tracked item as it's received into stock. On the [Purchase Receipts](#) (PO302000) or [Receipts](#) (IN301000) form, you do the following:

1. On the **Details** tab, click the line of the item being received.
2. Click **Line Details** on the table toolbar to open the **Line Details** dialog box.
3. In the table of the dialog box, click the line with the lot or serial number.

- In the **Lot/Serial Attributes** table, specify the attribute values of the units with the lot number or the unit with the serial number (see below).

Figure: Specifying an item's attribute values in the receipt

Setting Up Attribute-Based Pricing for Lot- and Serial-Tracked Items



This section describes how you specify attribute-based pricing for lot- and serial-tracked items. Beginning in Version 2026 R1, lot and serial pricing is available in service documents.

You can specify the sales price, manufacturer's suggested retail price (MSRP), and description for each attribute value of a stock item's lot- or serial-tracked units. This lets you align each unit's price with its precise properties.



This functionality is available only if the **Specify Lot/Serial Price and Description** check box is selected on the [Lot/Serial Classes](#) (IN207000) form for the stock item's lot or serial class. This check box can't be cleared once an item of the class has been used in a service document.

You use the [Lot/Serial Details](#) (IN209600) form to view the settings of a serial-tracked unit of a stock item or the lot-tracked units of an item. Initially, the sales price, MSRP, and description are copied from the **Default Price**, **MSRP** and **Description** boxes of the [Stock Items](#) (IN202500) form if they were specified.

You can override these default prices and description based on unit attributes. To do this, on the **Attributes** tab, select the attribute values, and override default settings as needed in the **Sales Price** (see below), **MSRP**, and **Description** boxes.

Lot/Serial Details
AAIRCOND17 JC000025

Note Files

Inventory ID * AAIRCOND17 - FS1700 Com...
 Lot/Serial Nbr. * JC000025
 Manufacturer Lot/Serial Nbr.
 Description FS1700 Commercial Whole Slow Ji

Lot/Serial Class ASNCFGJCR - Serial class w...
 Expiry Date
 Sales Price 2,600.0000
 MSRP 2,500.0000

ATTRIBUTES DESCRIPTION HISTORY

Attribute ID	Required	Value
VOLUME	<input type="checkbox"/>	96 fl oz
COLOR	<input type="checkbox"/>	08 fl oz
ORIGCOLOR	<input type="checkbox"/>	12 fl oz
		16 fl oz
		32 fl oz
		96 fl oz

Figure: Specifying a new price based on the selected attribute value

Lot and Serial Attributes in Service Documents

Once you have units of lot- or serial-tracked items with attribute values and sales prices specified, you can add these stock items to the following service documents:

- A service order on the [Service Orders](#) (FS300100) form
- An appointment on the [Appointments](#) (FS300200) form

On the **Details** tab of either form, click **Add Lot/Serial Nbr.** on the table toolbar. In the **Add Lot/Serial Nbr.** dialog box, which opens, select the unit or units with the needed lot or serial number and attributes (see below). Click **Add & Close**.



The **Add Lot/Serial Nbr.** action is not available in the Acumatica mobile app.

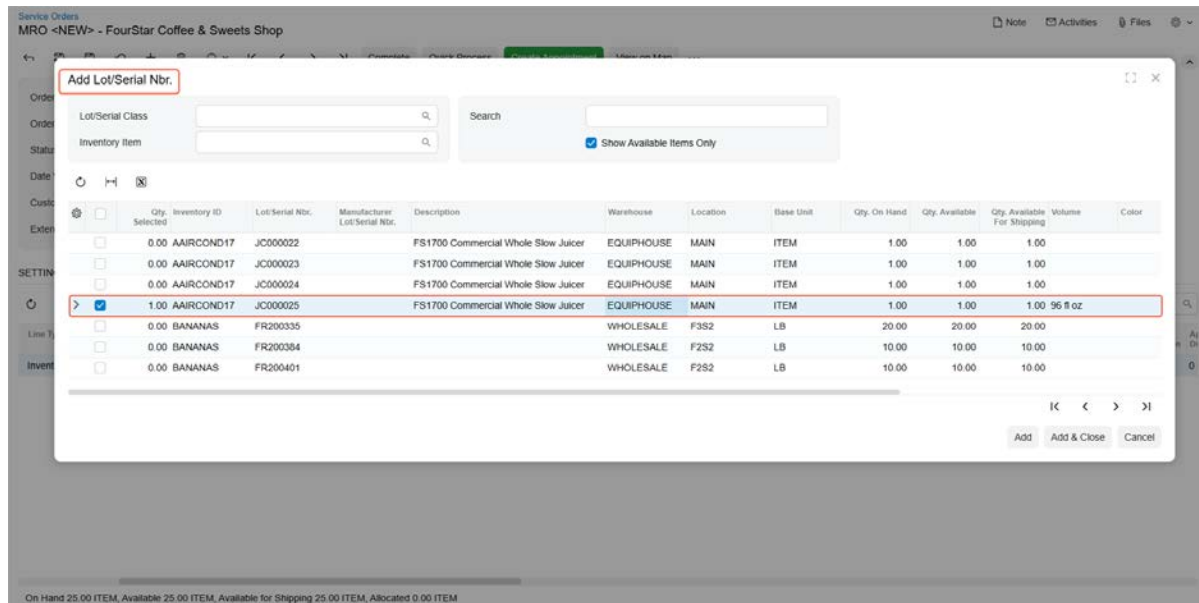


Figure: Selecting a serialized unit with attribute-based sales prices

The system closes the dialog box and adds the selected units to the **Details** tab. It inserts each unit with a lot or serial number in a separate line and automatically allocates the added units to the order. In each line of the service document:

- The attribute-specific price defined in the **Sales Price** box on the [Lot/Serial Details](#) (IN209600) form is inserted in the **Unit Price** column on the [Service Orders](#) or [Appointments](#) from.
- The description specified in the **Description** box on the [Lot/Serial Details](#) form is inserted into the **Description** column on the service form.



The **Copy Lot/Serial Nbrs. to Appointment from Service Order** check box may be cleared for the service order type on the [Service Order Types](#) (FS202300) form. This means that serial numbers and attribute-based prices aren't copied to an appointment created from a service order; you must enter them manually in the appointment.

Key Takeaways

- Technicians and dispatchers can now select **specific lot- or serial-tracked units** for service orders and appointments based on their defined attributes.
- Attributes help ensure that **the correct parts**—matching each customer's equipment—are used during maintenance and replacement.
- Service teams can apply **attribute-based pricing** directly in service orders and appointments.

Field Service: Discontinued Support for WorkWave Route Optimization

Starting in Acumatica ERP 2026 R1, the WorkWave route optimization functionality has been discontinued and is no longer supported.

What You Need To Know

With the removal of this functionality, the following changes have been applied:

- The **WorkWave Route Optimization** check box has been removed from the [Enable/Disable Features](#) (CS100000) form, so the feature can no longer be enabled.
- The *Optimize Appointment Scheduling* (FS501400) form is no longer available.
- The **Schedule Optimization Settings** section and its elements have been removed from the [Service Management Preferences](#) (FS100100) form.
- The **Optimization Result** box has been removed from the **Settings** tab (**Scheduled Date and Time** section) of the [Appointments](#) (FS300200) form.

About this Change

As of April 2024, Acumatica discontinued sales and official support for the WorkWave optimization engine integration. This integration previously assisted field service companies with route optimization and driver assignment for appointments. Because the integration is no longer available or supported, the corresponding feature has been removed from the system.

Finance: Accepting Payments by Using Mobile Card Readers

With Acumatica ERP 2026 R1, your employees can now seamlessly collect customer bank payments directly through the Acumatica mobile app. Whether they're in the field or on the sales floor, employees can initiate secure **EMV (Europay, Mastercard, and Visa)** card payments by using a compact Bluetooth® Low Energy (LE) card reader. This simple, mobile-friendly solution empowers sales representatives and technicians to complete transactions quickly and confidently on the go.



This functionality is available only if the customer's instance has the *Acumatica Payments* feature enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn how to set up and use this functionality.

At a Glance: The Setup Process

An administrative user wants to set up Acumatica ERP to accept payments via a mobile card reader connected to the Acumatica mobile app via Bluetooth. They do this as follows:

1. Setting up a processing center and clicking **Authenticate EMV Card Reader**
2. Entering the domain, username, and password to sign in to the processing center and establish an OAuth connection between the mobile app and the processing center
3. Creating a payment method
4. Assigning the processing center to the payment method

At a Glance: Usage Scenario

A field service technician has performed maintenance at a customer's site and wants to collect payment for the services and parts. The customer wants to pay by credit card. Here are the next steps:

1. The technician sets up the payment in the Acumatica mobile app on their phone.
2. The technician turns on and connects a mobile card reader.
3. The customer inserts a credit card in the reader and the transaction is performed.
4. Once the transaction has been completed successfully, the technician sends a receipt by email and leaves.

Functionality Setup

To set up the EMV card reader functionality:

1. On the [Payment Methods](#) (CA204000) form, create a payment method to support mobile terminals. In the **Means of Payment** box, select *EMV Mobile Card Reader*.

Payment Methods
MTERMINAL - Mobile Terminal

Payment Method ID * MTERMINAL

Active

Means of Payment EMV Mobile Card Reader

Description * Mobile Terminal

Use in AP
 Use in AR
 Use in PR
 Set Payment Date to Bank Transaction Date
 Require Remittance Information for Cash Account

ALLOWED CASH ACCOUNTS SETTINGS FOR USE IN AR REMITTANCE SETTINGS PROCESSING CENTERS

* Cash Account	Description	Branch	Use in AR	AR Default	AR Default For Refund	AR - Suggest Next Number	AR Last Reference Number
> 10600	Credit Card Account	PRODWHOLE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10601	Credit Cards CAD	PRODWHOLE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Figure: Selection of means of payment

The payment method with the *EMV Mobile Card Reader* means of payment will be available for selection only in the Payments and Applications screen in the mobile app.



This payment method can't be selected on the [Cash Sales](#) (AR304000) form or in the **Create Payment** dialog box on the [Sales Orders](#) (SO301000) and [Invoices](#) (SO303000) forms.

However, you can capture a payment with this means of payment on any of these forms if there's an active card transaction (that is, if authorization was performed in the mobile app).

2. On the **Preferences** tab of the [Processing Centers](#) (CA205000) form, for the processing center that uses the new payment method, select the **Use EMV Card Reader with Mobile app** check box.

This causes the **Authenticate EMV Card Reader** command to appear on the form toolbar. This command establishes an open authorization (OAuth) connection between Acumatica ERP and the processing center.



The OAuth connection allows users to grant third-party applications access to their resources without sharing their passwords. It works by using access tokens that are issued to the third-party application after the user authorizes it. These tokens can be used to access the user's data on behalf of the user, ensuring security and privacy.

Below you can see the check box and the command.

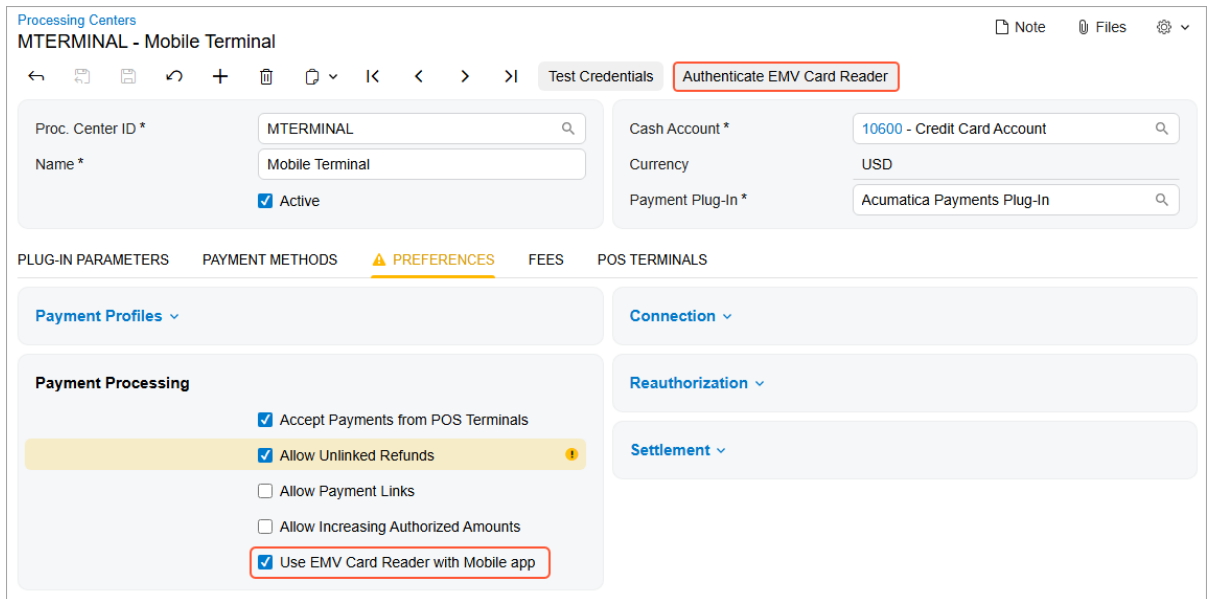


Figure: The settings on the Processing Centers form

3. On the toolbar of the *Processing Centers* form, click **Authenticate EMV Card Reader**. A hosted form is displayed.
4. Enter your domain, username, and password to complete authentication, as shown below.

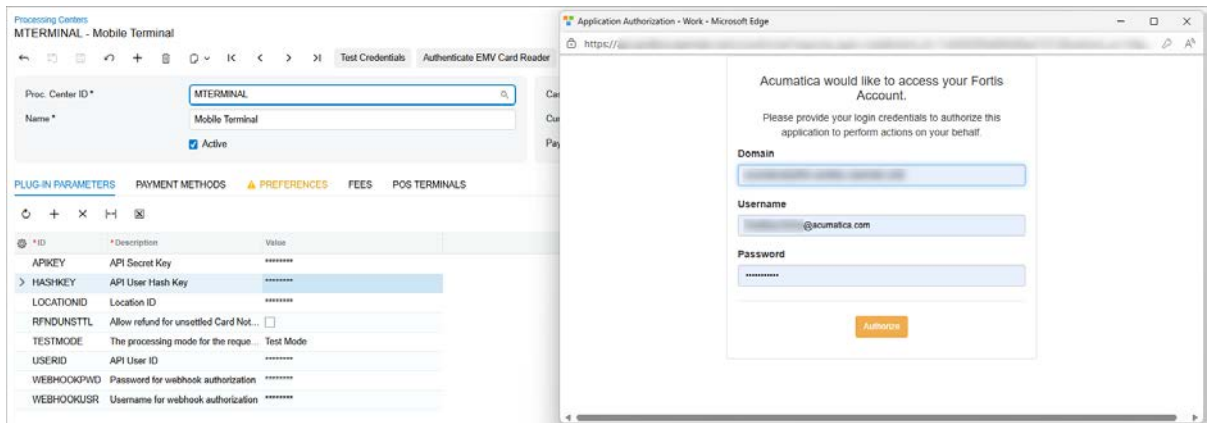




Figure: Entering credentials on the hosted form

If the authentication is successful and the access token works for the specified location, the system displays a confirmation message.

 If the provided access token is invalid for the selected location, the system displays an error message. You'll then be prompted to repeat the authorization process.

Changes in External Applications

When you click **Authenticate EMV Card Reader** on the *Processing Centers* (CA205000) form, the system creates an external application record on the *External Applications* (SM301000) form.

 The created record can't be manually deleted.

If the processing center works in test mode and in live mode, the system creates an external application with different URLs for each mode.

Once the external application has been created from the [Processing Centers](#) form, the following boxes on the [External Applications](#) form are filled in as noted and can't be edited:

- **Application Name:** *Acumatica Payments + Test Mode or Live Mode*
- **Client ID:** The client identifier, which has been stored externally by the cloud service
- **Client Secret:** The client secret, which has been stored externally by the cloud service
- **Authorization Endpoint:** The cloud service authorization URL (for sandbox or production, based on the selected mode)
- **Token Endpoint:** The cloud service token URL (for sandbox or production, based on the selected mode)

Below you can see an external application created by the system.

* Obtained On	Expires On	* Entity	Requested For	Token Description
10/14/2025 8:29 AM	10/16/2025 8:29 AM	PX.Objects.CA.CCProcessingCenter	TEST	
10/8/2025 1:17 AM	10/10/2025 1:17 AM	PX.Objects.CA.CCProcessingCenter	test2	
10/17/2025 3:44 AM	10/19/2025 3:44 AM	PX.Objects.CA.CCProcessingCenter	Mobile Terminal	

Figure: An external application created for Acumatica Payments



You can find more information about token refreshment in the [Access Token Refreshment](#) section of [Integration with External Applications](#).

Changes in Payment Processing

If a payment method with the *EMV Mobile Card Reader* means of payment is selected for a document on the [Payments and Applications](#) (AR302000) form, the payment processing changes as follows:

- You can authorize and capture card transactions only in the Acumatica mobile app.
- If you open this document in Acumatica ERP, you can perform actions with active card transactions only. For example, you can capture a transaction that's been previously authorized, validate a card transaction, void or refund a transaction, or record a transaction. If there are no active card transactions, only the **Record Card Transaction** command is available in Acumatica ERP.
- The credentials of the merchant location (location and access token) are sent to the mobile app when you click **Authorize** or **Capture** in the mobile app.
- Once you initiate a card transaction, the mobile app connects to the card reader via Bluetooth and sends complete transaction data.

Workflow of Processing a Payment

To process a payment by using the mobile card reader:

1. In the Acumatica mobile app, open the needed appointment. On the More menu, tap **Payment**.
The system opens the payment.

The screenshot shows the 'Payments' screen in the Acumatica mobile app. At the top, there is a title bar with a close icon (X), the word 'Payments', a paperclip icon, and a three-dot menu icon. Below the title bar, the reference number 'Ref. Nbr.: 005479' and the status 'Status: Pending Processing' are displayed. Underneath, the 'Processing Status:' is shown. There are two tabs: 'Summary' (which is selected) and 'Documents To Apply'. The main content area contains several fields with dropdown menus:

- Type: Payment
- Payment Amount: 100.00
- Currency *: USD
- Payment Date *: Oct 14, 2025
- Payment Period *: 10-2025
- Payment Ref.:
- Customer *: AACUSTOMER - Alta Ace
- Location *: MAIN - Primary Location
- Payment Method: MTERMINAL - Mobile Terminal
- Proc. Center ID *: TEST
- Cash Account *: 10600 - Credit Card Account

At the bottom of the screen, there are three navigation icons: a square, a circle with a dot, and a left-pointing triangle.

Figure: The payment pending processing

2. On the More menu, tap **Capture**.

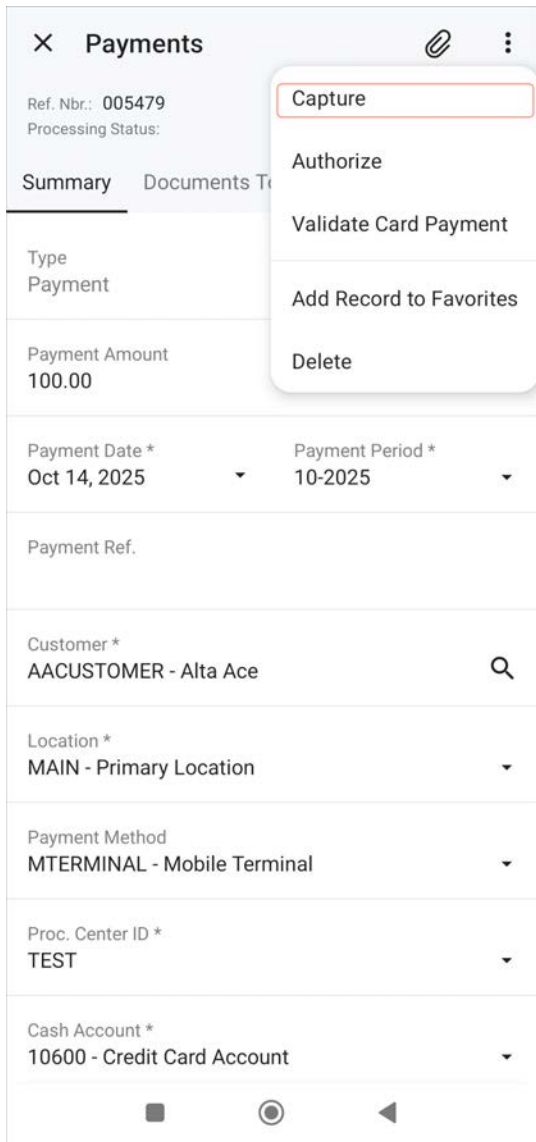


Figure: Capturing a card payment

3. On the next screen, tap **Process**.

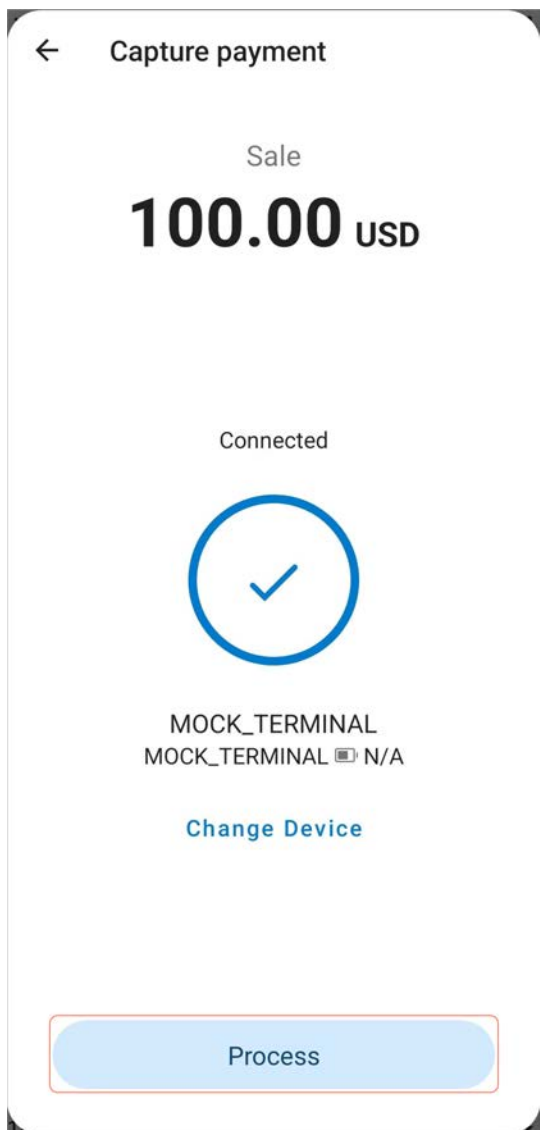


Figure: Processing the captured payment



This screen shows a virtual terminal. In a live environment, you'll see the ID of the card reader. At this point, the mobile app is ready to receive a card payment through the card reader.

4. The customer inserts or swipes their credit card.
Wait for the processing to be completed.

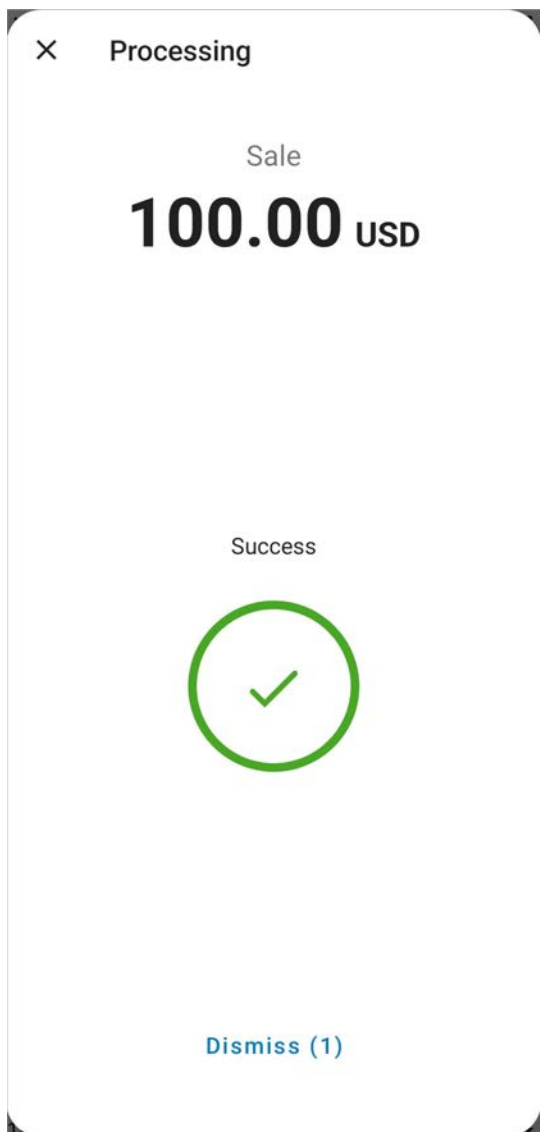


Figure: Successful completion of processing

5. Open the payment again. It now has the *Captured* processing status.

✕ Payments
📎
⋮

Ref. Nbr.: **005479** Status: **Open**

Processing Status: **Captured**

Summary
Documents To Apply

Type
Payment

Payment Amount
100.00

Currency *
USD

Payment Date *
Oct 15, 2025

Payment Period *
10-2025

Payment Ref.
11f0a9a0eca200d486fa5cb0

Customer *
AACUSTOMER - Alta Ace

Location *
MAIN - Primary Location

Payment Method
MTERMINAL - Mobile Terminal

Proc. Center ID *
TEST

Cash Account *
10600 - Credit Card Account

Figure: The captured payment

Below you can see the same payment opened on the [Payments and Applications](#) (AR302000) form of Acumatica ERP.

Payments and Applications
Note Activities Files

Payment 005479 - Alta Ace

Type: Payment

Reference Nbr.: 005479

Status: Open

Processing Status: Captured

Application Date *: 10/15/2025

Application Period *: 10-2025

Payment Ref.: 11f0a9a0eca200d486fa5cb0

Customer: AACUSTOMER - Alta Ace

Location: MAIN - Primary Location

Payment Method: MTERMINAL - Mobile Terminal

Proc. Center ID: TEST - TEST

Cash Account: 10600 - Credit Card Account

Currency: USD

Payment Amount: 100.00

Applied to Documents: 0.00

Applied to Orders: 0.00

Available Balance: 100.00

Write-Off Amount: 0.00

Finance Charges: 0.00

Deducted Charges: 0.00

DOCUMENTS TO APPLY SALES ORDERS APPLICATION HISTORY FINANCIAL APPROVALS **CARD PROCESSING** CHARGES

Tran. Nbr.	Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Expire On (Est.)	Referenced Tran. Nbr.	Card/Account Nbr.	Proc. Center Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center Response Reason	* Tran. Time	Proc. Status	CVV Verification
696	TEST	Authorize and Capture	Approved	100.0000			Visa **** * 1111	11f0a9a0eca200d486fa5	a9aDec	Approved	10/15/2025	Completed	Matched

Figure: The processed payment opened in Acumatica ERP

Know the Limitations

- The system will process voided payments and refunds as non-card transactions based on the previous transaction ID.
- Users can't create unlinked refunds with the *EMV Mobile Card Reader* means of payment.

Key Takeaway

Salespeople and technicians can benefit from collecting card payments by using their Acumatica mobile app. They don't have to use a POS terminal, which isn't convenient for field work. Also, the customer doesn't need to enter their card number and CVV manually on a salesperson's device. Simple and compact EMV card readers connected via Bluetooth® Low Energy (LE) are used to read the bank card data.

Learn More

Need more details? See [Accepting Payments by Using Mobile Card Readers](#) and [To Set Up the EMV Card Reader Functionality](#).

Finance: Anomaly Detection for Journal Entries—Now Powered by Generic Inquiries

In Acumatica ERP 2026 R1, you can now analyze journal entry anomalies through a modern, inquiry-driven framework. The new *GL-ML-Journal Entries Analysis* generic inquiry and the *Journal Entries Analysis (GL3010ML)* form replace the legacy *GL Anomaly Detection* feature.

This update delivers a more flexible, inquiry-driven approach to identifying unusual journal activity—while aligning anomaly detection with the broader AI Studio framework.



The new inquiry is available only if the *AI Studio* and *Anomaly Detection* features are enabled on the [Enable/Disable Features \(CS100000\)](#) form.

What's New

The new *GL-ML-Journal Entries Analysis* generic inquiry (shown below) has been added to help you identify anomalies in journal entries posted through the [Journal Transactions \(GL301000\)](#) form. This inquiry:

- Leverages AI-based analysis through an external calculation service
- Evaluates transaction patterns and expected values
- Flags entries with varying levels of anomaly severity

Anomaly detection is now performed through a generic inquiry for greater transparency and extensibility.

Figure: The new generic inquiry

How Anomaly Detection Works

To detect anomalies:

1. Open the [Generic Inquiry \(SM208000\)](#) form.
2. In the **Inquiry Title** box, select *GL-ML-Journal Entries Analysis*.
3. On the **Anomaly Detection** tab, specify the needed settings.

4. On the form toolbar, click **Detect Anomalies**. The *Detect Anomalies in Generic Inquiries* (ML502000) form opens.
5. In the **Generic Inquiry Dataset List** table, select the Included check box for the inquiry and then click **Process**.
6. On the toolbar of the **Generic Inquiry Dataset List** table, click **Execute Next Step**.
7. On the form toolbar, click **Process**. The system sends the inquiry dataset to the external AI service, which:
 - Calculates the expected transaction values
 - Compares them with the actual values
 - Assigns anomaly severity levels

When analysis finishes, the processing status changes from *Calculation in Progress* to *Completed* (see below).

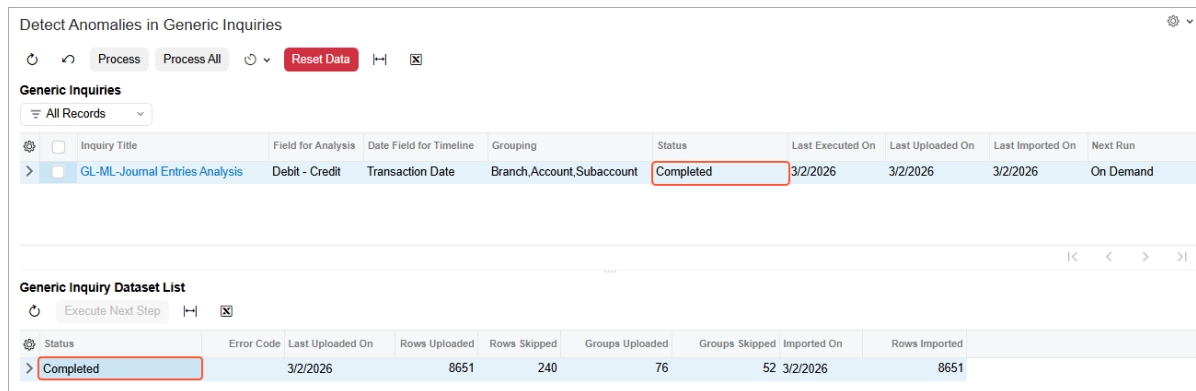


Figure: Anomaly calculation is completed

Reviewing Detected Anomalies

You use the new *Journal Entries Analysis* (GL3010ML) generic inquiry form to review the results (see below).

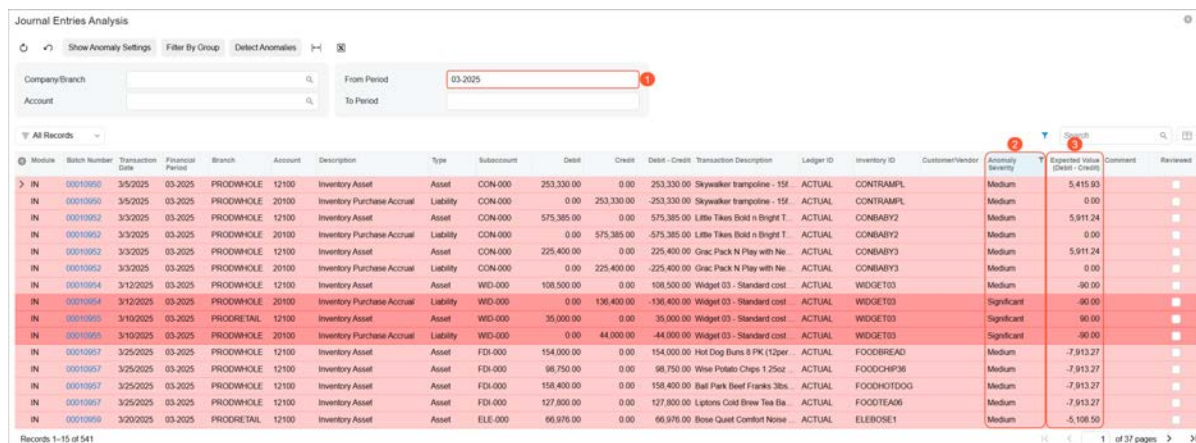


Figure: The *Journal Entries Analysis* form with the anomalies found

Key Highlights:

- The **From Period** box (Item 1) is filled in by default with the period one year prior to the current period. This limits the dataset to one year of transactions, for more efficient and focused analysis.
- The **Expected Value (Debit - Credit)** column (Item 3) displays the AI-calculated expected results.
- The **Anomaly Severity** column (Item 2) classifies each transaction as:
 - *Normal*

- *Medium*
- *Significant*

The greater the variance between the expected value and the actual value, the higher the severity level. This makes it easy to quickly prioritize transactions that require review.

Marking Transactions as Reviewed

If a flagged transaction on the *Journal Entries Analysis (GL3010ML)* form is determined to be valid, do the following in its row:

1. Select the **Reviewed** check box.
2. Enter an explanation in the **Comment** column (see below).

Module	Batch Number	Transaction Date	Financial Period	Branch	Account	Description	Type	Subaccount	Debit	Credit	Debit - Credit	Transaction Description	Ledger ID	Inventory ID	Customer/Vendor	Anomaly Severity	Expected Value (Debit - Credit)	Comments	Reviewed
IN	0001090	3/5/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	CON-000	253,330.00	0.00	253,330.00	Skyswaker trampoline - 15f	ACTUAL	CONTRAMP1		Medium	5,415.93		<input type="checkbox"/>
IN	0001090	3/5/2025	03-2025	PRODWHOLE	20100	Inventory Purchase Accrual	Liability	CON-000	0.00	253,330.00	-253,330.00	Skyswaker trampoline - 15f	ACTUAL	CONTRAMP1		Medium	0.00		<input type="checkbox"/>
IN	0001092	3/3/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	CON-000	575,385.00	0.00	575,385.00	Lilla Tales Bold n Bright T...	ACTUAL	CONBABY2		Medium	5,911.24		<input type="checkbox"/>
IN	0001092	3/3/2025	03-2025	PRODWHOLE	20100	Inventory Purchase Accrual	Liability	CON-000	0.00	575,385.00	-575,385.00	Lilla Tales Bold n Bright T...	ACTUAL	CONBABY2		Medium	0.00		<input type="checkbox"/>
IN	0001092	3/3/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	CON-000	225,400.00	0.00	225,400.00	Grac Pack N Play with Ne...	ACTUAL	CONBABY3		Medium	5,911.24		<input type="checkbox"/>
IN	0001092	3/3/2025	03-2025	PRODWHOLE	20100	Inventory Purchase Accrual	Liability	CON-000	0.00	225,400.00	-225,400.00	Grac Pack N Play with Ne...	ACTUAL	CONBABY3		Medium	0.00		<input type="checkbox"/>
IN	0001094	3/12/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	WID-000	108,500.00	0.00	108,500.00	Widget 03 - Standard cost	ACTUAL	WIDGET03		Medium	-90.00	The entry is ok.	<input checked="" type="checkbox"/>
IN	0001094	3/12/2025	03-2025	PRODWHOLE	20100	Inventory Purchase Accrual	Liability	WID-000	0.00	136,400.00	-136,400.00	Widget 03 - Standard cost	ACTUAL	WIDGET03		Significant	-90.00		<input type="checkbox"/>
IN	0001090	3/10/2025	03-2025	PROGRETAL	12100	Inventory Asset	Asset	WID-000	35,000.00	0.00	35,000.00	Widget 03 - Standard cost	ACTUAL	WIDGET03		Significant	90.00		<input type="checkbox"/>
IN	0001090	3/10/2025	03-2025	PRODWHOLE	20100	Inventory Purchase Accrual	Liability	WID-000	0.00	44,000.00	-44,000.00	Widget 03 - Standard cost	ACTUAL	WIDGET03		Significant	-90.00		<input type="checkbox"/>
IN	0001097	3/25/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	FDI-000	154,000.00	0.00	154,000.00	Hot Dog Buns 8 PK (12per...	ACTUAL	FOODBERAD		Medium	-7,913.27		<input type="checkbox"/>
IN	0001097	3/25/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	FDI-000	98,750.00	0.00	98,750.00	Wise Potatoes Chigs 1 25oz...	ACTUAL	FOODCHP36		Medium	-7,913.27		<input type="checkbox"/>
IN	0001097	3/25/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	FDI-000	158,400.00	0.00	158,400.00	Ball Park Beef Franks 3lbs...	ACTUAL	FOODHOTDOG		Medium	-7,913.27		<input type="checkbox"/>
IN	0001097	3/25/2025	03-2025	PRODWHOLE	12100	Inventory Asset	Asset	FDI-000	127,800.00	0.00	127,800.00	Liptons Cold Brew Tea Ba...	ACTUAL	FOODTEA06		Medium	-7,913.27		<input type="checkbox"/>
IN	0001099	3/20/2025	03-2025	PROGRETAL	12100	Inventory Asset	Asset	ELE-000	66,976.00	0.00	66,976.00	Bose Quiet Comfort Noise ...	ACTUAL	ELEBOSE1		Medium	-5,108.50		<input type="checkbox"/>

Figure: An entry marked as reviewed

Documenting review decisions in the inquiry supports audit transparency.

Deprecated Functionality

As part of this enhancement, the legacy *GL Anomaly Detection* feature has been deprecated in Version 2026 R1. The following forms, inquiries, and dashboards are no longer supported:

- *Analyze Accounting Transactions (GL510000)*
- *Review Anomaly Predictions (GL406000)*
- *Reclassified YTD by Amount (GL0011DB)*
- *Unprocessed GL Transactions with High Score (GL0005DB)*
- *Reclassified YTD by Class (GL0009DB)*
- *GL-Accepted Prediction % (GL0012DB)*
- *Reclassifications by Period (GL0008DB)*
- *Anomalies this Period (GL0007DB)*
- *Open Anomalies by Confidence (GL0006DB)*
- *Reclassified YTD by Confidence (GL0010DB)*
- *Companies with Pending Anomaly Detection (GL0004DB)*
- *GL Anomalies (DBGL0001)*

To detect anomalies in journal entries, you can use generic inquiries with the **Detect Anomalies** check box selected.

For more details about the AI enhancements, see [AI Studio: Nested Generic Inquiries in Anomaly Detection](#) and [AI Studio: Renaming of AI Features](#).

Why This Matters

This enhancement delivers:

- A more unified AI experience through AI Studio
- Greater flexibility through generic inquiries
- A simplified anomaly detection workflow
- Improved transparency into the expected versus actual transaction values
- Better auditability through review tracking

By embedding anomaly detection into the generic inquiry framework, Acumatica ERP provides a more scalable and extensible foundation for AI-driven financial analysis.

Finance: Applying Refunds to Bills and Invoices When Credits Exceed Document Amounts

In Acumatica ERP 2026 R1, you can apply refunds directly to bills and invoices—even when the total of related credits exceeds the document amount. This enhancement helps you settle open documents faster and more cleanly.

Whether you're working in accounts payable or accounts receivable, you can now fully apply all related documents in a single refund transaction.

What You Can Do Now

- Settle bills and invoices with refunds in a single transaction—even when credits exceed document totals
- Reduce manual steps and reconciliation effort
- Improve accuracy and transparency in refund processing
- Maintain existing controls, validations, and auditability

Simplify Refund Settlement in AP

In accounts payable, refunds often arise when credit adjustments exceed outstanding bills. Previously, these situations required multiple transactions to fully apply credits and close documents. Now refunds can settle all related AP documents at once.

On the **Documents to Apply** tab of the *Checks and Payments* (AP302000) form, you can now apply documents of additional types to a vendor refund. The *Bill* and *Credit Adjustment* types are now available, along with *Debit Adjustment* and *Prepayment* (see below).

The screenshot displays the 'Checks and Payments' form for a vendor refund. The form includes fields for Type (Refund), Reference Nbr. (003046), Status (On Hold), Application Date (12/26/2025), Application Period (12-2025), Vendor (AAVENDOR - Goto Vendor Inc), Location (MAIN - Primary Location), Payment Method (CHECK), Cash Account (10200 - Company Checking Account), Currency (USD), and Payment Amount (500.00). Below the form is a table titled 'DOCUMENTS TO APPLY' with a dropdown menu open showing document types: Debit Adj., Bill, Credit Adj., Debit Adj., and Prepayment.

Branch	Document Type	Reference Nbr.	Currency	Amount Paid	Cash Discount Taken	With. Tax	Amount Paid (USD)	Cash Discount Taken (USD)	With. Tax (USD)	Cross Rate	Inventory ID	Date	Due Date	Cash Discount Date
	Debit Adj.			0.00	0.00	0.00	0.00	0.00	0.00	0.00000000				

Figure: Document types that can be applied to a vendor refund

If you click **Load Documents** on the table toolbar, the system loads documents of all supported types.

The system now calculates the application amount as follows.

$$\text{Application Amount} = \text{Amount Paid (Debit Adj.)} + \text{Amount Paid (Prepayment)} - \text{Amount Paid (Bill)} - \text{Amount Paid (Credit Adj.)}$$

As a result, you can settle all related AP documents together—without creating separate refund or adjustment transactions.

Refunds continue to follow the same workflows you already use. Refunds that include bills and credit adjustments can still be voided, and any applied documents are reopened and made available for future processing, if needed.

Apply Refunds More Flexibly in AR

Customer refunds often involve a combination of invoices and credits, especially when customers have been over-credited. On the **Documents to Apply** tab of the *Payments and Applications* (AR302000) form, you can now apply customer refunds to documents of additional types. The *Invoice*, *Debit Memo*, and *Overdue Charge* types are now available (see below) in addition to *Credit Memo*, *Payment*, and *Prepayment*.

The screenshot shows the 'Payments and Applications' form for Refund 005767 - Alta Ace. The 'Type' is set to 'Refund'. The 'Customer' is 'AACUSTOMER - Alta Ace'. The 'Payment Amount' is 750.00. The 'DOCUMENTS TO APPLY' tab is active, showing a table with columns for Doc. Type, Reference Nbr., Currency, Amount Paid, Cash Discount Taken, Write-Off Amount, Amount Paid (USD), Cash Discount Taken (USD), Write-Off Amount (USD), Cross Rate, Inventory ID, and Customer. A dropdown menu is open for 'Doc. Type', showing options: Credit Memo, Credit Memo, Payment, Prepayment, Debit Memo, Invoice, and Overdue Charge. The 'Credit Memo' option is highlighted.

Figure: Document types that can be applied to a customer refund

The system now calculates the application amount as follows.

$$\text{Applied to Documents} = \text{Amount Paid (Credit Memo)} + \text{Amount Paid (Prepayment)} + \text{Amount Paid (Payment)} - \text{Amount Paid (Invoice)} - \text{Amount Paid (Debit Memo)} - \text{Amount Paid (Overdue Charge)}$$

This calculation allows you to fully settle a customer's open documents—even when credit memos exceed invoice totals—without breaking the process into multiple transactions.

When you're working with parent and child customer accounts, you can apply refunds created at the parent level to documents from associated child accounts. This capability simplifies centralized settlement for organizations with complex customer structures.

Create Refunds Directly from Bank Transactions

You can also use this capability in bank reconciliation workflows, reducing manual cleanup after you've matched transactions.

Customer Refunds from Disbursement Transactions

When matching a disbursement on the [Process Bank Transactions](#) (CA306000) form, you can now create a customer refund and match it to multiple document types. If the **Match to Multiple Documents** check box is selected on the **Match to Invoices** tab, you can match a refund to invoices, debit memos, credit memos, and overdue charges. The refund's application history reflects all selected documents.



For credit memos to appear in the table on the **Match to Invoices** tab, you must select the **Allow Matching to Credit Memo** check box in the **Transaction Matching Settings** dialog box. It's selected automatically if on the [Cash Management Preferences](#) (CA101000) form, the check box with the same name is selected on the **Bank Statements** tab (**Disbursement Matching** section).

Below you can see a \$600 disbursement (Item 1) matched to three AR documents (Item 2). The transaction amount matches the total amount of the documents (Item 3). When you click **Process** on the form toolbar, the system creates a \$600 customer refund.

The screenshot shows the 'Process Bank Transactions' form with the 'MATCH TO INVOICES' tab selected. A disbursement of 600.00 is highlighted in red (Item 1). The 'MATCH TO MULTIPLE DOCUMENTS' checkbox is checked. The 'Transaction Matching Settings' dialog box is open, showing a 'Matched Amount' of 600.00 (Item 3). The 'Matched' table below shows three AR documents: AR015042 (Invoice, -400.00), AR015041 (Credit Memo, 400.00), and AR015043 (Credit Memo, 600.00), with a total of 600.00 (Item 2).

Matched	Ext. Ref. Nbr.	* Tran. Date	Receipt	Disbursement
<input type="checkbox"/>	11012025	11/1/2025	3,205.71	0.00
<input type="checkbox"/>	11102025WT	11/10/2025	700.00	0.00
<input type="checkbox"/>	000000011	11/10/2025	0.00	10.00
<input type="checkbox"/>	000000015	11/30/2025	0.00	40.00
<input type="checkbox"/>	11202025FX	11/20/2025	1,070.00	0.00
<input type="checkbox"/>		12/10/2025	0.00	1,200.00
<input type="checkbox"/>		12/12/2026	0.00	459.00
<input type="checkbox"/>		12/16/2026	1,500.00	0.00
<input type="checkbox"/>		12/22/2026	14,500.00	0.00
<input checked="" type="checkbox"/>		12/22/2026	0.00	600.00

Matched	Match Relevance, %	Module	Type	* Reference Nbr.	Ext. Ref. Nbr.	* Doc. Date	Amount	Cash Discount	Discount Date
<input type="checkbox"/>	0.000	AR	Invoice	AR014990	AACUSTO...	6/12/2025	-5,544.50	0.00	7/12/2025
<input type="checkbox"/>	0.000	AR	Invoice	AR015033		10/22/2025	-1,000.00	0.00	11/21/2025
<input checked="" type="checkbox"/>	0.000	AR	Invoice	AR015042		11/22/2025	-400.00	0.00	12/22/2025
<input checked="" type="checkbox"/>	0.000	AR	Credit Memo	AR015041		11/22/2025	400.00	0.00	
<input checked="" type="checkbox"/>	0.000	AR	Credit Memo	AR015043		11/27/2025	600.00	0.00	

Figure: Matching of a disbursement to multiple AR documents

You can also create customer refunds and match them to multiple documents when creating an AR payment for a disbursement on the **Create Payment** tab of the [Process Bank Transactions](#) form.

Vendor Refunds from Receipt Transactions

Similarly, when matching a receipt, you can create a vendor refund and apply it to bills, credit adjustments, and debit adjustments in one step. To be able to match a receipt to multiple AP documents, you must select the **Match to Multiple Documents** check box on the **Match to Payments** tab.

The system ensures that the matched document amounts balance with the bank transaction amount, preserving existing validation rules.



For debit adjustments to appear in the table on the **Match to Invoices** tab, you must select the **Allow Matching to Debit Adjustment** check box in the **Transaction Matching Settings** dialog box. It's selected automatically if on the [Cash Management Preferences](#) (CA101000) form, the check box with the same name is selected on the **Bank Statements** tab (**Disbursement Matching** section).

Below you can see a \$1500 receipt (Item 1) matched to four AP documents (Item 2). The transaction amount matches the total amount of the documents (Item 3). When you click **Process** on the form toolbar, the system creates a \$1500 vendor refund.

The screenshot shows the 'Process Bank Transactions' interface. The 'MATCH TO INVOICES' tab is active, and the 'Match to Multiple Documents' checkbox is checked. A table of matched transactions is shown below, and a summary table on the right displays transaction and matched amounts.

Matched	Ext. Ref. Nbr.	* Tran. Date	Receipt	Disbursement
<input type="checkbox"/>	11012025	11/1/2025	3,205.71	0.00
<input type="checkbox"/>	11102025WT	11/10/2025	700.00	0.00
<input type="checkbox"/>	00000011	11/10/2025	0.00	10.00
<input type="checkbox"/>	00000015	11/30/2025	0.00	40.00
<input type="checkbox"/>	11202025FX	11/20/2025	1,070.00	0.00
<input type="checkbox"/>		12/10/2025	0.00	1,200.00
<input checked="" type="checkbox"/>		12/12/2026	0.00	-459.00
<input checked="" type="checkbox"/>		12/16/2026	1,500.00	0.00
<input type="checkbox"/>		12/22/2026	14,500.00	0.00
<input checked="" type="checkbox"/>		12/22/2026	0.00	600.00

Matched	Match Relevance, %	Module	Type	* Reference Nbr.	Ext. Ref. Nbr.	* Doc. Date	Amount	Cash Discount	Discount Date
<input type="checkbox"/>	0.000	AP	Bill	005932	0000998	1/14/2026	-12,000.00	0.00	2/13/2026
<input type="checkbox"/>	0.000	AP	Bill	005933	000086543	11/22/2025	-12,000.00	0.00	12/22/2025
<input checked="" type="checkbox"/>	0.000	AP	Bill	005934	0099776544	11/22/2025	-2,000.00	0.00	12/22/2025
<input checked="" type="checkbox"/>	0.000	AP	Credit Adj.	005936		11/27/2025	-500.00	0.00	12/27/2025
<input checked="" type="checkbox"/>	0.000	AP	Debit Adj.	005935		11/27/2025	1,000.00	0.00	
<input checked="" type="checkbox"/>	0.000	AP	Debit Adj.	005937		11/28/2025	3,000.00	0.00	

Transaction Amount	1,500.00
Matched Amount	1,500.00
Charge Amount	0.00
Charge Tax Amount	0.00
Unmatched Amount	0.00

Figure: Matching a receipt to multiple AP documents

You can also create vendor refunds and match them to multiple documents when creating an AP payment for a receipt on the **Create Payment** tab of the [Process Bank Transactions](#) form.

Reverse and Void Refund Applications

Refunds that include bills, invoices, and other newly supported document types fully support existing reversal scenarios:

- Voiding a refund reverses the original transaction and reopens all applied documents.
- Reversing an application allows you to undo applications without forcing immediate reapplication to other documents.
- A refund can't be saved with an out-of-balance application amount, ensuring accounting integrity at all times.

These safeguards help maintain accurate balances while giving you the flexibility to correct or adjust refund applications when needed.

What Hasn't Changed

To ensure a smooth transition, refunds follow the same workflows and rules as they did previously:

- The default settings and validation of the **Amount Paid** and **Cash Discount Taken** values remain unchanged.
- The existing calculations of the balance, currency, and discount continue to apply.
- No changes have been made to related reports, APIs, access rights, database structure, or mobile functionality.

At a Glance

You can now apply refunds across bills, invoices, and related credits in one streamlined process—saving time while keeping your financial data accurate and balanced.

Finance: Direct Integration with BILL for International Vendor Payments (USD)

In Acumatica ERP 2026 R1, you can now use the BILL integration to prepare payments for **international vendors** (those outside the United States) when you're working with USD bills. You can pay vendor bills in USD from Acumatica ERP, while vendors can receive funds in either USD or their local currency. BILL manages currency conversion, regulatory compliance, and cross-border payment delivery.



These capabilities are available only if the *Third-Party Integrations* and *BILL Integration* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn about the improvements in vendor management and payment processing.

Vendor Definition: Domestic or International

The system determines whether a vendor is domestic or international based on the country specified in the remit-to address on the **Payment** tab of the [Vendors](#) (AP303000) form. If *US* is specified, the vendor is considered domestic. If any other country is specified, the vendor is considered international.

If the *Business Account Locations* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, the system will use the remit-to address of the vendor location. This address is specified in the **Remit-To Address** section on the **Payment** tab of the [Vendor Locations](#) (AP303010) form. If the *Business Account Locations* feature is disabled, the system will use the remit-to address of the vendor's hidden *MAIN* location.

Creating an International Vendor in BILL from Acumatica ERP

For international vendors, Acumatica ERP provides a widget-based flow for creating the vendor in BILL. On the More menu of the [Vendors](#) (AP303000) and [Vendor Locations](#) (AP303010) forms, the **Create Vendor in BILL** command has been added.

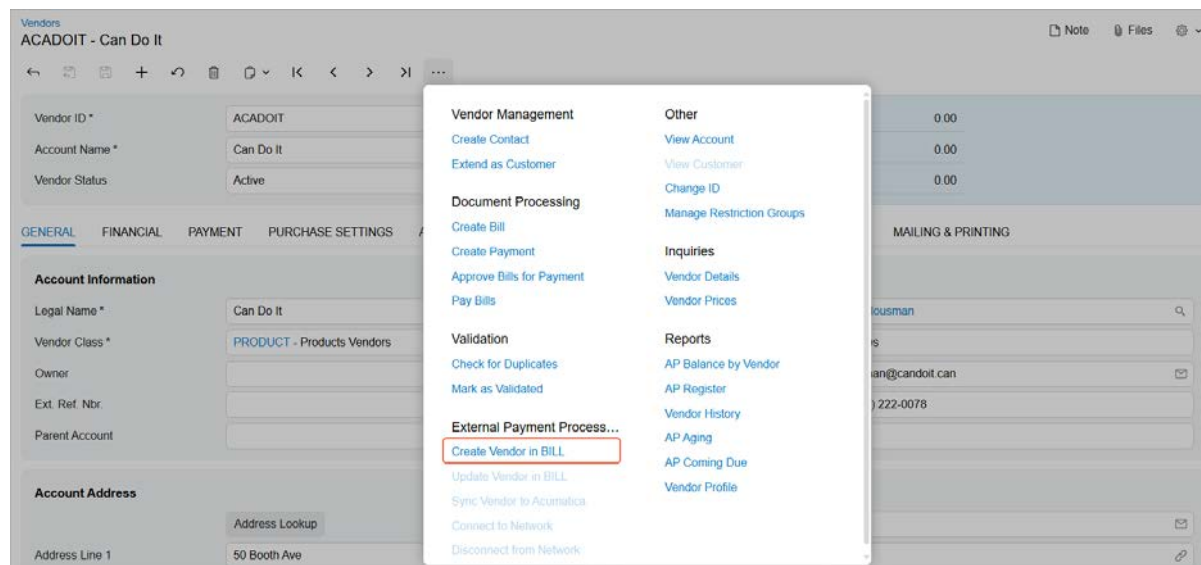


Figure: The Create Vendor in BILL command

This command is available if the vendor location doesn't have an external ID under the current company. When you click this command, the system:

- For a domestic vendor: Creates the vendor in BILL by using an API call

- For an international vendor: Opens the widget shown below, where you create a new vendor

The screenshot shows a software interface for managing vendors. At the top, there's a header for 'Vendors' and 'ACADOIT - Can Do It'. Below this are navigation icons and a set of tabs: GENERAL, FINANCIAL, PAYMENT, PURCHASE SETTINGS, ATTRIBUTES, LOCATIONS, CONTACTS, ACTIVITIES, GL ACCOUNTS, and MAILING & PRINTING. The 'GENERAL' tab is active. The form is divided into several sections:

- Vendor Information:** Vendor ID * (ACADOIT), Account Name * (Can Do It), Vendor Status (Active).
- Financial Summary:** Balance (0.00), Prepayment Balance (0.00), Retained Balance (0.00).
- Account Information:** Legal Name * (Can Do It), Vendor Class * (PRODUCT - F), Owner, Ext. Ref. Nbr., Parent Account.
- Account Address:** Address Look..., Address Line 1 (50 Booth Ave), Address Line 2, City (Toronto), State (ON - Ontario), Postal Code (M4M 2M2), Country * (CA - Canada).
- Contact Information:** Ethan Housman, VP Sales, ehousman@candoit.can, +1 (416) 222-0078.

A modal window is open in the center, titled 'Let's search for a vendor match'. It contains the following text: 'We'll check the **bill** network for a match. Enter the vendor name as it appears on a recent invoice or statement.' Below this text are two input fields: 'Vendor Name*' (containing 'ACADOIT') and 'Where is your vendor located?' with a 'Country*' dropdown menu (set to 'Canada'). A blue 'Next' button is at the bottom of the modal.

Figure: The widget that opens on the Vendors form

To create a new vendor:

1. In the widget, enter the vendor's name and country and click **Next**.
If the vendor already exists in BILL, the system will display an error.
2. In the next step, shown below, click the **Set vendor up another way** link.

The screenshot shows the 'Vendors' page for 'ACADOIT - Can Do It'. A search modal is open, displaying 'No results found. Try adjusting your search.' The modal prompts the user to enter the vendor name as it appears on a recent invoice or statement. The 'Vendor Name' field contains 'ACADOIT'. Below this, it asks 'Where is your vendor located?' with 'Country' set to 'Canada'. A link 'Set vendor up another way.' is highlighted in a red box. A 'Search' button is at the bottom of the modal. In the background, the 'Primary Contact' section is visible with 'Ethan Housman' as the contact name, 'VP Sales' as the title, and the email 'ehousman@candoit.can' and phone number '+1 (416) 222-0078'.

Figure: Setting the vendor up another way

3. Enter the vendor's name, type, address, and other info and click **Next**.

The screenshot shows the 'Tell us more about your vendor' modal. The 'Vendor name' field contains 'ACADOIT'. The 'Vendor type' dropdown is set to 'Business'. The 'Country' dropdown is set to 'Canada'. The 'Address' field contains '50 Booth Ave', and the 'City' field contains 'Toronto'. The 'Vendor phone number' field contains '+1 (416) 222-0077'. There is also a field for 'Account number with Vendor'. At the bottom of the modal, there are 'Next' and 'Back' buttons. The background shows the same 'Primary Contact' information as the previous screenshot.

Figure: Entering the vendor's information

4. Enter the vendor's email address or click **Enter vendor's bank info myself** option button; click **Save**.

Vendors
ACADOIT - Can Do It

Vendor ID * ACADOIT
Account Name * Can Do It
Vendor Status Active

Balance 0.00
Prepayment Balance 0.00
Retained Balance 0.00

GENERAL FINANCIAL PAYMENT PURCHASE SETTINGS ATTRIBUTES LOCATIONS CONTACTS ACTIVITIES GL ACCOUNTS MAILING & PRINTING

Account Information
Legal Name * Can Do It
Vendor Class * PRODUCT - Products Vendor
Owner
Ext. Ref. Nbr.
Parent Account

Primary Contact
Ethan Housman
VP Sales
ehousman@candoit.ca
+1 (416) 222-0078

Account Address
Address Lookup
Address Line 1 50 Booth Ave
Address Line 2
City Toronto
State ON - Ontario
Postal Code M4M 2M2
Country * CA - Canada

How do you want to pay?

ACADOIT
50 Booth Ave
Toronto, ON M4M 2M2
Canada

Ask vendor to provide bank details by email
They'll receive a link to set up a BILL account with their info.
Vendor email address *

Enter vendor's bank info myself
Provide bank details and set currency preferences for your vendor.

Save
Back

Payment Information
+1 (416) 222-0077

Figure: Specifying the vendor's bank details



If the **Ask vendor to provide bank details by email** option button is selected, you will have to wait for the vendor's email. If you have the vendor data, clicking the **Enter vendor's bank info myself** option button can speed up data entry.

- If you clicked **Enter vendor's bank info myself**, specify the vendor's preferred currency and click **Next**.

The screenshot shows the 'Vendors' form for 'ACADOIT - Can Do It'. The form is divided into several tabs: GENERAL, FINANCIAL, PAYMENT, PURCHASE SETTINGS, ATTRIBUTES, LOCATIONS, CONTACTS, ACTIVITIES, GL ACCOUNTS, and MAILING & PRINTING. The 'GENERAL' tab is active. The form includes fields for Vendor ID, Account Name, Vendor Status, Balance, Prepayment Balance, and Retained Balance. A modal window titled 'Vendor's bank location' is open, showing a dropdown for 'Canada' and 'Currency preferences' with radio buttons for 'USD - United States Dollar' (selected) and 'CAD - Canada Dollar'. Below these are options for 'Currency your vendor will receive' and a 'Next' button.

Figure: Specifying the vendor's currency preferences



The current functionality enables bill payments in USD, so click **USD - United States Dollar** as the currency for bills. The currency your vendor will receive can be USD or a foreign currency. This data will be saved in BILL. When you create bills in Acumatica ERP in the future and pay them in BILL, these settings will be used.

- Follow the instructions in the widget to add the vendor's bank info and account number and then click **Save**. The widget shows a confirmation message that the vendor has been added.

Reviewing the BILL-Provided Payment Details of the Vendor

After the vendor is created, the BILL-provided details of the vendor are displayed in the **External Payment Processing** section on the **Payment** tab of the *Vendors* (AP303000) form.

Below you can see the boxes that have been added to the section.

The screenshot shows the 'Vendors' form for 'ACADOIT - Can Do It'. The 'PAYMENT' tab is active. The 'External Payment Processing' section is highlighted with a red box and contains the following information:

External Payment Processing	
<p><i>The payment instructions and remittance information may differ from the data used by the external payment processor during disbursement.</i></p>	
BILL Status	Not Connected
Preferred Disbursement Method	International ePayment
Bank Account	*****6789
Financial Institution	CANADIAN WESTERN BANK
Payment Currency	CAD

Figure: New boxes in the External Payment Processing section

The new boxes show the vendor's information specified in BILL:

- **Financial Institution:** The name of the vendor's bank
- **Payment Currency:** The currency in which the vendor will receive payments



The new boxes appear on the form for international vendors.

Updating an International Vendor in BILL

For international vendors, Acumatica ERP also provides a widget-based flow for updating vendor info in BILL. The **Update Vendor in BILL** command has been added to the More menu of the [Vendors](#) (AP303000) and [Vendor Locations](#) (AP303010) forms, as shown below.

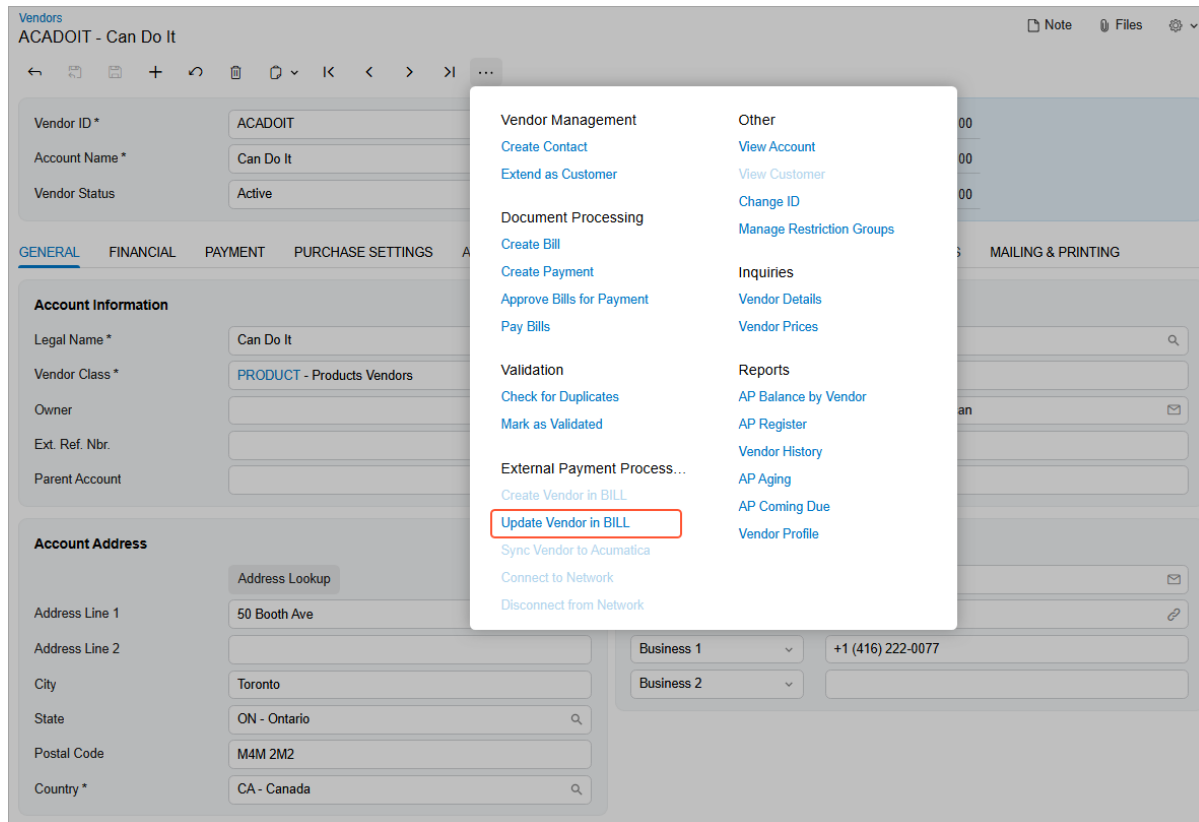


Figure: The Update Vendor in BILL command

You can click this command whenever you need to. The system opens a widget where you update the vendor's settings. If at least one vendor payment has the *Scheduled* processing status, you can't update the vendor's settings, and the widget will display an error. If no vendor payment has been created yet, you can update the vendor's data related to the currency and bank details. After the widget closes, the system fetches the vendor data and updates the vendor's **External Payment Processing** section on the **Payment** tab of the *Vendors* form.

Processing International Payments

Acumatica ERP supports the following scenarios:

- A bill created in USD is paid in USD.
- A bill created in USD is paid in a foreign currency.

Example

Suppose that a bill in the amount of USD 1200 has been entered in the system for a Canadian vendor. Because your company is based in the US, you will pay this bill in USD, but the vendor will receive this payment in CAD. The amount will be converted in BILL by using the exchange rate that's valid at the time of the conversion.

Below you can see the payment to the vendor created in BILL.

Process Payments / Print Checks

Payment Method * **BILL**

Cash Account * 10200 - Company Checking Account

Currency USD

Money transmission services provided by Bill.com, LLC (NMLS #: 1007645)

GL Balance	187,445,818.16
Available Balance	187,445,818.16
Selection Total	1,200.00
Number of Payments	1

Payment Date	Type	Reference Nbr.	Vendor ID	Vendor Name	Payment Amount	Disbursement Method	Fast Delivery Method
3/4/2026	Payment	003045	ACADOIT	Can Do It	1,200.00	INTERNATIONAL_E_PAYMENT	
3/2/2026	Payment	003044	INDEXILES	Exiles Indsysteme	48.00	INTERNATIONAL_E_PAYMENT	

Figure: The USD payment to the international vendor

The warning in the **Payment Method** box says that the payment will be processed in the BILL sandbox environment. This warning won't appear in the production environment.

Once you click **Process** on the form toolbar, the system displays the widget shown below.

Process Payments / Print Checks

Payment Method * **BILL**

Cash Account * 10200 - Company Checking Account

Currency USD

Money transmission services provided by Bill.com, LLC (NMLS #: 1007645)

GL Balance	187,445,818.16
Available Balance	187,445,818.16
Selection Total	1,200.00
Number of Payments	1

Payment Date	Type	Reference Nbr.	Payment Amount	Disbursement Method	Fast Delivery Method
3/4/2026	Payment	003045	1,200.00	INTERNATIONAL_E_PAYMENT	
3/2/2026	Payment	003044	48.00	INTERNATIONAL_E_PAYMENT	

Enter your 6-digit code

We sent a code to your phone ending in 4719 to confirm it's you. If this number isn't correct, or you're not receiving a code, contact Acumatica support.

Verification code *

Remember this device for 180 days

Didn't get a code? [Send code again.](#)

Verify

Figure: A widget with payment confirmation

When you enter the code and click **Verify**, the payment retains its *Pending Processing* status.

Processing usually occurs the next day. You can click the **Synchronize Payment** button on the **Remittance** tab of the *Checks and Payments* (AP302000) form to sync the payment between Acumatica ERP and BILL.

When the payment has been processed in BILL, its status changes to *Processed*.

What Hasn't Changed

As an Acumatica ERP user, you won't notice any changes in payment processing. Acumatica ERP won't perform currency conversion, rounding, or RGOL calculation.

Learn More

For more information about the setup of international payments, see [International Payments with BILL](#).

For more information about the processing of international payments, see [Processing International Payments](#).

Finance: BILL Integration Enhancements—Pay Faster Service and Vendor Network Support

Acumatica ERP 2026 R1 introduces enhancements to the BILL integration, which improve day-to-day usability and control if you process vendor payments through BILL. This version gives you clearer vendor connection management, more predictable payment processing, and greater visibility into when and why payment dates may change.

You can also:

- Roll out a BILL payment method faster
- Control which bill documents can be uploaded to BILL
- Distribute debit adjustments more reliably

For an urgent check payment, you can also request faster delivery and review the associated fees before scheduling the payment.



These capabilities are available only if the *Third-Party Integrations* and *BILL Integration* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

What the Initial Bill Integration Delivered

In Acumatica ERP 2025 R2, the initial phase of integration introduced automated processing of vendor payments through BILL. This phase established the core setup and payment execution capabilities, including:

- Connecting Acumatica ERP to BILL for automated ACH, check, and virtual card payments
- Onboarding companies and users and verifying funding accounts in BILL
- Delegating payment execution to BILL while retaining visibility into external payment processing statuses in Acumatica ERP
- Simplifying vendor maintenance by allowing BILL to manage vendors' bank account details and preferred payment methods

The current enhancements build on this functionality with the capabilities described below.

Keeping Vendor Names Consistent When Creating BILL Vendors

When a BILL vendor is created as part of payment processing, its name is now based on the **Account Name** value on the **Payment** tab of the [Vendors](#) (AP303000) form. If the account name is missing, the system stops the vendor creation and shows an error. This prevents the creation of a vendor with incomplete naming information.

Uploading Bill Attachments to BILL

To help you manage what gets uploaded to BILL, on the [External Payment Processor](#) (AP205500) form, you can define a tag that identifies bill scans (Item 1 below).

The screenshot shows the 'External Payment Processor' form. The 'Payment Process...' dropdown is set to 'BILL'. The 'Name' field contains 'BILL Payment Processor'. The 'Active' checkbox is checked. The 'Plug-In *' dropdown is set to 'BILL'. The 'Bill Upload Tag' dropdown is set to 'Bill Scan' (highlighted with a red box and a red '1' in a circle). The 'Upload Untagged Single File' checkbox is checked (highlighted with a red box and a red '2' in a circle). Below the form are two tables: 'Companies' and 'USERS'.

Company ID	Company Name	Onboarded
CAPITAL	Revision Two Capital	<input checked="" type="checkbox"/>
PRODUCTS	Revision Two Products	<input checked="" type="checkbox"/>

Username	Name	Email	Status
admin	admin admin	administrator@acumatica.com	Active

Figure: The UI elements related to tags

When a value is selected in the **Bill Upload Tag** box, only AP document files with the selected tag are uploaded to BILL during payment processing. The maximum allowed file size is 6 MB.

Optionally, you can select the **Upload Untagged Single File** check box (Item 2). If it is selected and an AP document has only one attached file without the tag, that single file can still be uploaded.

On the [Incoming Documents](#) (AP301110) form, when recognition runs and the selected bill upload tag has been selected for the active processor, the system automatically adds the tag to the file after the AP document is created and the file is attached.



Uploading scanned bills increases the chance that a virtual card will be used for disbursement.

BILL as the Default Payment Method

When the *BILL Integration* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, the system automatically creates:

- The *BILL* payment processor on the [External Payment Processor](#) (AP205500) form
- The *BILL* payment method on the [Payment Methods](#) (CA204000) form

The [Update Vendor Payment Methods](#) (AP507100) form has been added to mass-update vendor payment methods, cash accounts, and optionally, unpaid AP documents. The new form is shown below.

Vendor	Vendor Name	Location Name	Payment Method	Cash Account	City	State	Country
<input checked="" type="checkbox"/>	AVENDOR	Goto Vendor Inc	CHECK	10200	Kansas City	MO	US
<input type="checkbox"/>	ACADOIT	Can Do It	CHECK	10950	Toronto	ON	CA
<input type="checkbox"/>	ALPINEAIR	Alpine Air Products	CHECK	10200	Chicago	IL	US
<input type="checkbox"/>	AMERREFRIG	American Refrigeration	CHECK	10200	Phoenix	AZ	US
<input type="checkbox"/>	ASARHARD	Asar Hardware Limited	CHECK	10200	San Francisco	CA	US
<input type="checkbox"/>	BRIDGETOWN	Bridgetown Building Materials	CHECK	10200	Miami	FL	US
<input type="checkbox"/>	CITYOFSF	City of San Francisco	CHECK	10200	San Francisco	CA	US
<input type="checkbox"/>	CONCRETSUP	Concrete Supply Co.	CHECK	10200	Kansas City	MO	US
<input type="checkbox"/>	CONDEWSUP	Dewsoft Toy Supply	CHECK	10200	Maharashtra		IN
<input type="checkbox"/>	CONGOODTOL	Good Hardware Ple., Ltd.	CHECK	10200	Singapore		SG
<input type="checkbox"/>	CONNETHJENN	Net Jenn Toy Development	CHECK	10200	Bremerton	WA	US
<input type="checkbox"/>	CONPERIPH	Periphery Distribution Co.	CHECK	10200	New York	NY	US
<input type="checkbox"/>	CONXIAN	XIANGTAN Apparel	CHECK	10200	Shizuishan		CN

Figure: The Update Vendor Payment Methods form

To update the vendors' and vendor locations' payment method to *BILL*, the system administrator does the following:

1. Specifies the needed settings in the Selection area.
2. In the table, selects the Included check boxes for the records to be updated.
3. Clicks **Process** on the form toolbar.

The system updates the payment method of the selected vendors and vendor locations with *BILL*. If the **Update Open Documents** check box is selected, the system also updates the payment method of each document that meets all of the following conditions:

- The document type is *Bill*, *Credit Adj.*, *Debit Adj.*, or *Prepayment*.
- The document has the same payment location as one of the vendor locations selected in the table. The document's payment location is specified on the **Financial** tab of the *Bills and Adjustments* (AP301000) form.
- The status isn't *Closed*, *Rejected*, or *Voided*.
- The document has a nonzero open balance.

Distributing Debit Adjustments Among Bills

When a payment includes multiple bills and debit adjustments, the system distributes debit adjustments across bills so that the resulting payment request fits *BILL* constraints. Bills that are fully offset—with a net applied amount of 0—are excluded from the request. Additionally, **zero-amount payments are not sent to *BILL*** and receive the *Balanced* status instead of *Pending Processing*.

Example

On the *Process Payments / Print Checks* (AP505000) form, a user schedules a payment that has these documents applied:

- Bill 1 in the amount of \$100
- Bill 2 in the amount of \$90

- A debit adjustment in the amount of \$110

The system first applies the \$110 debit adjustment to bill 1, up to the full amount of \$100. The remaining balance of the debit adjustment (\$10) is then applied to bill 2.

As a result, bill 1 is fully offset (with a net applied amount of \$0) and excluded from the BILL payment request. Bill 2 is partially offset (with a net applied amount of \$80) and is sent in an API request to BILL.

Verid Widget for Non-Admin Users

On the **Funding Accounts** tab of the *User Profile* (SM203010) form, the system now opens the BILL Verid widget for identity verification, which provides limited access.

In the example shown below, a user not assigned the *Administrator* rights has clicked **Verify** on the table toolbar. The system displays the BILL widget with limited access rights.

The screenshot shows the 'User Profile' form for user SM203010, specifically the 'FUNDING ACCOUNTS' tab. A 'Verify' button is visible in the toolbar. A modal window is open over a table, displaying a 2-step verification process. The table has columns for Verification Status, Company, Bank, Account Type, Account Number, Account Status, and Cash Account. One row is visible with 'Nominated' status, 'PRODUCTS' company, 'Active' status, and '10200' cash account.

The verification modal contains the following text and fields:

- Title: Let's first set up 2-step verification
- Text: Before completing sensitive payment actions, we'll send a code to this number to confirm it's you.
- Field: Phone number * (with a dropdown for country code and a text input containing '(201) 555-0123')
- Text: How do you want to get codes?
- Options: Text message, Voice call
- Button: Next

Figure: The widget on the User Profiles form

Payment Date Auto-Shift Warning

BILL may shift payment dates due to constraints, such as holidays, cut-off times, or verification delays. In these cases, the *Process Payments / Print Checks* (AP505000) form now shows a **non-blocking warning**. The warning appears after processing for any successfully processed payment whose final scheduled date differs from the requested date.

Changed Company Data in Acumatica ERP Reflected in BILL

When key company details—such as legal name and address fields—are updated in Acumatica ERP, the system flags the corresponding BILL company records and attempts to update them in BILL. If the update fails for a technical reason, the system retries the update during subsequent payment processing on the *Process Payments / Print Checks* (AP505000) form.

Additionally, the system uses the following safeguards and guidance:

- Prevents the deletion of a company linked to BILL, with an explicit error message.
- Shows a clearer error when onboarding is attempted for an inactive company and uses **Company Legal Name** as the default name sent to the onboarding widget. (However, users can still change it in the widget.)

Connecting Vendors to the BILL Network

On the [Vendors](#) (AP303000) and [Vendor Locations](#) (AP303010) forms, new commands have been added to the More menu (see below):

- **Sync Vendor to Acumatica** (Item 1 below): Updates the vendor status and disbursement method and copies remit-to details from BILL to Acumatica ERP after the vendor becomes connected.
- **Connect to Network** (Item 2): If a vendor isn't connected, the system opens the vendor search widget and connects the vendor. Optionally, the system connects related vendor locations or companies that share the same remit-to details—so you don't have to repeat the same work across similar records.

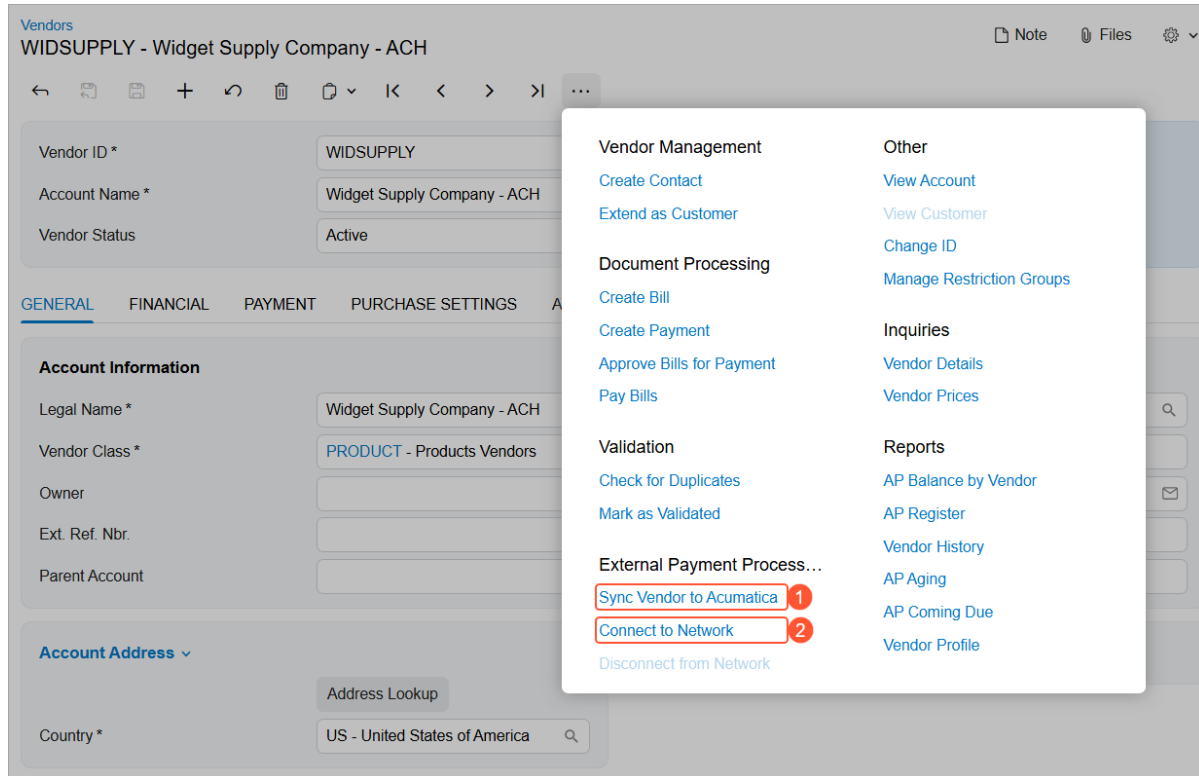


Figure: Commands on the More menu of the Vendors form

Below is the vendor search widget that the system opens when you click **Connect to Network**.

The screenshot displays the 'Vendors' form for 'WIDSUPPLY - Widget Supply Company - ACH'. The form is divided into several sections: 'GENERAL' (Vendor ID, Account Name, Vendor Status), 'FINANCIAL' (Balance, Prepayment Balance, Retained Balance), 'ACCOUNT INFORMATION' (Legal Name, Vendor Class, Owner, Ext. Ref. Nbr., Parent Account), 'ACCOUNT ADDRESS' (Country), and 'ACCOUNT CONTACT INFORMATION' (Contact Name, Purchasing, Email, Phone). A modal dialog box is overlaid on the form, titled 'Let's search for a vendor match'. The dialog contains the text: 'We'll check the **bill** network for a match. Enter the vendor name as it appears on a recent invoice or statement.' Below this text is a search input field containing 'Widget Supply Company - ACH' and a blue 'Next' button.

Figure: The vendor search widget



If the user hasn't been created in the external payment processor for the relevant company, the system displays an error describing what needs to be done. In this case, you should add and onboard the user on the [External Payment Processor](#) (AP205500) form.

Because BILL may use network-maintained details during disbursement, the system displays informational messaging to keep users aware that remittance information shown in Acumatica ERP can differ from what BILL uses when the vendor is connected or pending connection.

Disconnecting Vendors from the BILL Network

You can click **Disconnect from Network** on the More menu of the [Vendors](#) (AP303000) or [Vendor Locations](#) (AP303010) form to disconnect a vendor from BILL. The system displays a widget with a guided dialog box that lists the related vendor locations or companies. You can disconnect various network locations linked to the same vendor in the BILL network under various companies.

This process supports common outcomes and clear messaging (for example, vendors that can't be disconnected because they aren't connected or have pending payments).

Pay Faster Service

When the vendor's preferred disbursement method is *Check*, BILL can provide expedited domestic check delivery options. To support this, the [Checks and Payments](#) (AP302000) form includes:

- **Pay Faster** (Item 1 below): A check box that you select to use the Pay Faster service for the document. This service is intended for USD payments and US vendor locations only.
- **Fast Delivery Method** (Item 2): A method of delivering the check. This box appears on the form if the **Pay Faster** check box is selected. Select one of the following options: *Overnight Check Delivery* (default), *2-day Check Delivery*, or *3-day Check Delivery*.

- **View Fees** (Item 3): A button that you click to review the delivery fees.

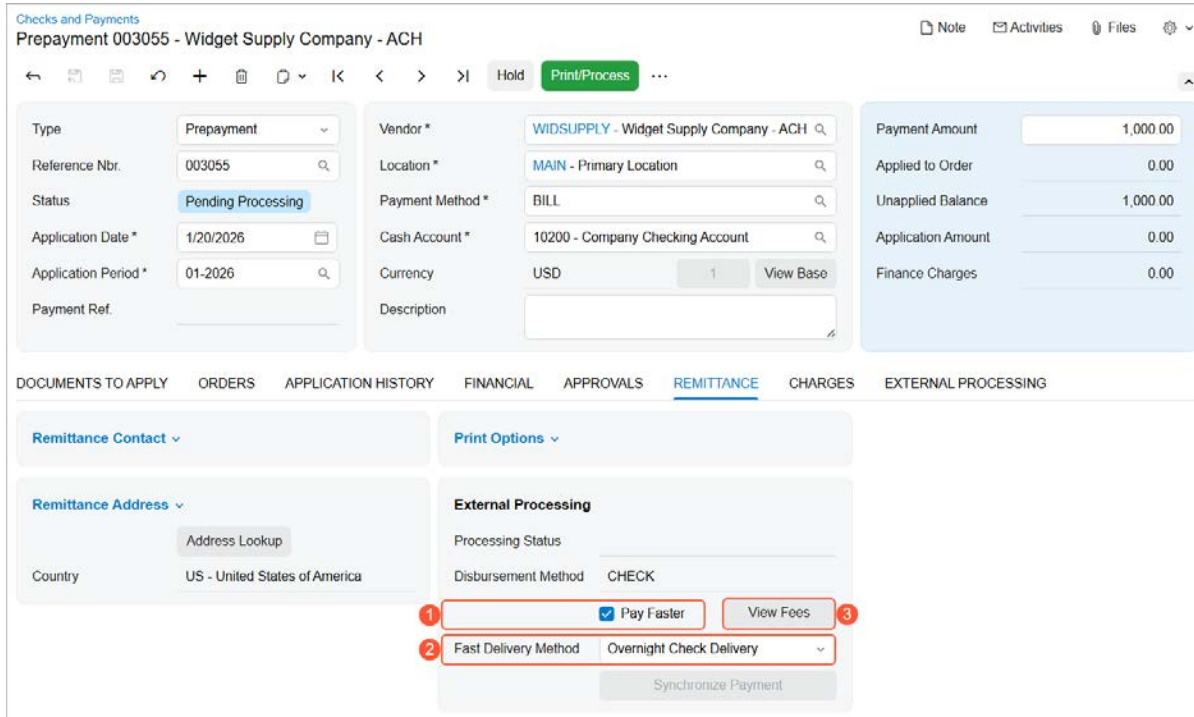


Figure: UI elements that support fast payments

If you click **View Fees**, the system displays the **Fast Delivery Fees** dialog box with applicable fees (see below). These fees aren't stored in Acumatica ERP; instead, they're fetched from an external service to be sure they're accurate at the moment. The fee amounts are paid separately rather than being added to the document amounts.

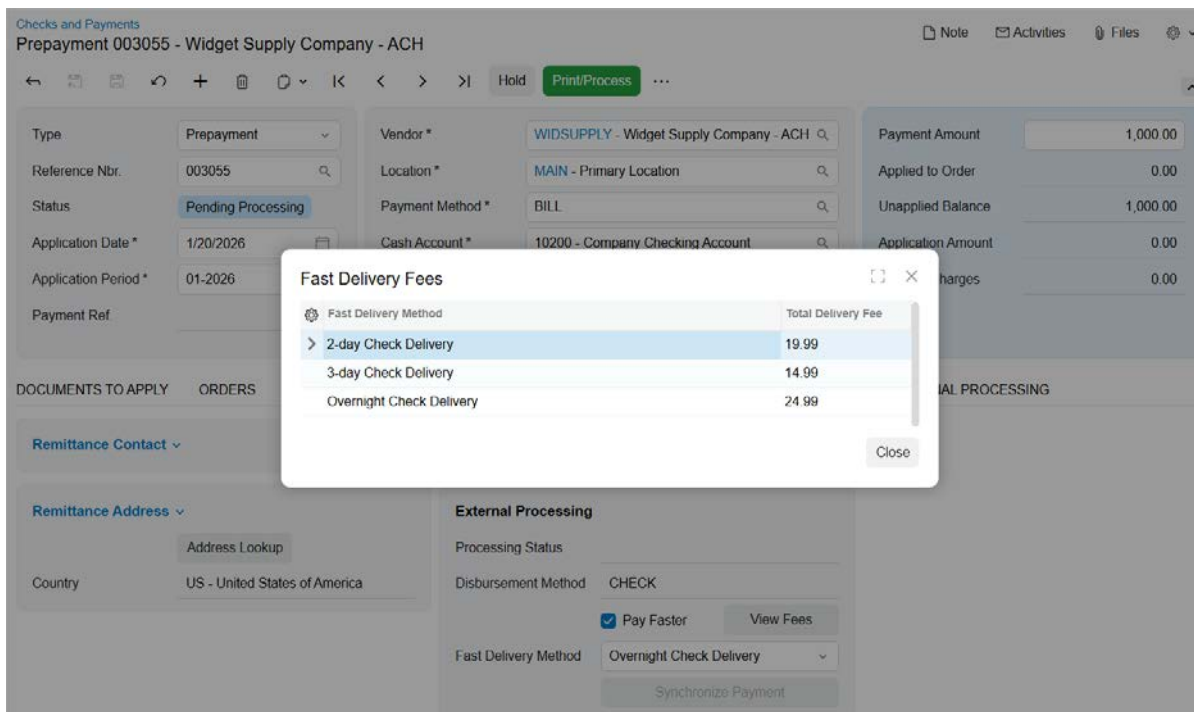


Figure: The Fast Delivery Fees dialog box

Once the payment is scheduled, the Pay Faster service cannot be added, edited, or removed. If BILL processes the payment using a disbursement method other than *Check*, it ignores the state of the **Pay Faster** check box and proceeds with the selected disbursement method.

Notable Changes

- You can roll out BILL broadly by using the [Update Vendor Payment Methods](#) (AP507100) form.
- You can control which bill attachments are uploaded to BILL by specifying a bill upload tag
- Vendor connection management is clearer, thanks to user-friendly statuses, new commands for connecting to and disconnecting from the network, and messaging about connected-vendor behavior.
- Payment processing on the [Process Payments / Print Checks](#) (AP505000) form is more predictable, with debit-adjustment distribution and warnings when BILL shifts the requested payment dates.
- For check payments, you can use the Pay Faster service to expedite delivery and confirm fees in advance.

Learn More

For more information about the setup of BILL Integration, see [Setup of Integration with BILL](#) and [To Update the Default Payment Method for Vendors](#).

For more information about the document creation, see [Creating Documents for External Payment Processing](#) and [Distributing Debit Adjustments Among Bills](#).

Finance: Enhanced Foreign Currency Payment Experience

In Acumatica ERP 2026 R1, we've made managing multicurrency payments easier and more intuitive. You can now **enter the amount paid directly in the document currency** when creating AR or AP payments or reconciling bank transactions—no need to manually calculate the cross rate based on application amounts.

This update eliminates a common pain point: Bank statements rarely include cross rates, often forcing users to perform time-consuming manual conversions. It also reduces the risk of small rounding gain or loss discrepancies that can occur when exchange rates are limited to a set number of decimals.

Version 2026 R1 also introduces greater visibility and flexibility in managing exchange rates. You can now:

- **Review the exact cross rate** used for payments received from customers or made to vendors
- **Enter either a direct rate or a reciprocal rate** when applying payments to invoices in different currencies

With these enhancements, Acumatica ERP 2026 R1 empowers your finance team to process international payments faster, more accurately, and with greater confidence.



This functionality is available only if the *Multicurrency Accounting* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn how to create documents that specify the amount paid in the document currency and how to create payments based on bank statements.

Key Capabilities

- **Enter payments in the document currency:** Record payments received in foreign currencies—even when using a local currency bank account—by specifying the amount paid directly in the invoice currency. The system calculates the cross rate and bank account currency for greater precision and efficiency.
- **Process foreign payments faster:** When settling foreign currency bills or invoices from a local currency account, enter the amount paid in the document's original currency. This eliminates extra calculations and ensures that payments are accurately applied across currencies.
- **Reconcile bank statements accurately:** While creating AR or AP payments based on bank statements, specify the amount paid in the invoice or bill currency for full alignment between bank transactions and financial records—no manual conversions required.

Creating an AR Payment

When you create an AR payment on the [Payments and Applications](#) (AR302000) form, you can now enter the amount paid, cash discount taken, and write-off amount in the document currency.

Example

You've released an invoice for EUR 1000 (USD 1134.76) and received a payment of USD 1140 for it. You need to create a payment and apply it to fully pay the invoice as follows:

1. On the [Payments and Applications](#) form, create a payment of USD 1140.
2. On the **Documents to Apply** tab, add the EUR 1000 invoice, as shown below.

The system automatically inserts the invoice amount in USD in the **Amount Paid (USD)** column. If you apply the invoice with this amount paid (USD 1134.76), the payment will still have an available balance of USD 5.24.

Payments and Applications
Payment 005764 - Alta Ace

Type: Payment
Reference Nbr.: 005764
Status: Balanced
Application Date: 10/22/2025
Application Period: 10-2025
Payment Ref.: PMT05664

Customer: AACUSTOMER - Alta Ace
Location: MAIN - Primary Location
Payment Method: CHECK - Check
Card/Account Nbr.:
Cash Account: 10200 - Company Checking Account
Currency: USD
Description:

Payment Amount: 1,140.00
Applied to Documents: 1,134.76
Applied to Orders: 0.00
Available Balance: 5.24
Write-Off Amount: 0.00
Finance Charges: 0.00
Deducted Charges: 0.00

DOCUMENTS TO APPLY | SALES ORDERS | APPLICATION HISTORY | FINANCIAL | APPROVALS | CHARGES

Branch	Doc. Type	Reference Nbr.	Currency	Amount Paid	Cash Discount Taken	Amount Paid (USD)	Cross Rate	Inventory ID	Customer	Date	Due Date	Cash Discount Date	Balance	Cash Discount Balance
PRODWHOLE	Invoice	AR015035	EUR	1,000.00	0.00	1,134.76	1.13476465		AACUSTOMER	10/14/2025	11/13/2025	11/13/2025	0.00	0.00

Figure: A payment with the invoice applied to it

- In the **Amount Paid (USD)** column, enter 1140.
- Click **Release** to release the payment and the application.

After release, the payment is closed because it has been fully applied to the invoice, as shown below.

Payments and Applications
Payment 005764 - Alta Ace

Type: Payment
Reference Nbr.: 005764
Status: Closed
Application Date: 10/22/2025
Application Period: 10-2025
Payment Ref.: PMT05664

Customer: AACUSTOMER - Alta Ace
Location: MAIN - Primary Location
Payment Method: CHECK - Check
Card/Account Nbr.:
Cash Account: 10200 - Company Checking Account
Currency: USD
Description:

Payment Amount: 1,140.00
Applied to Documents: 0.00
Applied to Orders: 0.00
Available Balance: 0.00
Write-Off Amount: 0.00
Finance Charges: 0.00
Deducted Charges: 0.00

DOCUMENTS TO APPLY | SALES ORDERS | APPLICATION HISTORY | FINANCIAL | APPROVALS | CHARGES

Branch	Batch Number	Doc. Type	Reference Nbr.	Currency	Amount Paid	Cash Discount Taken	Amount Paid (USD)	Cash Discount Taken (USD)	Write-Off Amount (USD)	Cross Rate	Inventory ID	Customer	Application Date	Application Period
PRODWHOLE	AR016081	Invoice	AR015035	EUR	1,000.00	0.00	1,140.00	0.00	0.00	1.14000000		AACUSTOMER	10/22/2025	10-2025

Figure: The released AR payment

On the **Application History** tab (shown above), you can see the currency of the applied invoice in the **Currency** column. The **Amount Paid (USD)** column displays the invoice's amount in the payment currency, which is USD.

Creating an AP Payment

When you create an AP payment on the *Checks and Payments* (AP302000) form, you can enter the amount paid, cash discount taken, and withholding tax amounts in the document currency.

Example

You've released a bill for EUR 1000 (USD 1134.76) and later made a payment of USD 1136. You need to apply this payment to fully pay the bill as follows:

- On the *Checks and Payments* form, create a payment of USD 1136.
- On the **Documents to Apply** tab, add the EUR 1000 bill, as shown below.

The system inserts the bill amount in USD in the **Amount Paid (USD)** column. If you apply the bill with this amount paid (USD 1134.76), the payment will still have an unapplied balance of USD 1.24.

Checks and Payments
Payment 003044 - Business Hardware

Type: Payment
Reference Nbr: 003044
Status: On Hold
Application Date: 11/17/2025
Application Period: 11-2025

Vendor: BUSINHARD - Business Hardware
Location: MAIN - Primary Location
Payment Method: CHECK
Cash Account: 10200 - Company Checking Account
Currency: USD

Payment Amount: 1,136.00
Unapplied Balance: 1.24
Application Amount: 1,134.76
Finance Charges: 0.00

Branch	Document Type	Reference Nbr.	Currency	Amount Paid	Cash Discount Taken	With. Tax	Amount Paid (USD)	Cash Discount Taken (USD)	With. Tax (USD)	Cross Rate	Inventory ID	Date	Due Date	Cash Discount Date	Balance
PRODWHOLE	Bill	005930	EUR	1,000.00	0.00	0.00	1,134.76	0.00	0.00	1.13476455		11/6/2025	12/6/2025	12/6/2025	0.00

Figure: A payment with the bill applied to it

- In the **Amount Paid (USD)** column, enter 1136.
- Click **Remove Hold**.
- Click **Print/Process** to continue processing the payment. Then click **Process** on the [Release Payments \(AP505200\)](#) form to release the payment.

After release, the payment is closed because it has been fully applied to the bill, as shown below on the [Checks and Payments](#) form.

Checks and Payments
Payment 003044 - Business Hardware

Type: Payment
Reference Nbr: 003044
Status: Closed
Application Date: 11/17/2025
Application Period: 11-2025
Payment Ref: 3878

Vendor: BUSINHARD - Business Hardware
Location: MAIN - Primary Location
Payment Method: CHECK
Cash Account: 10200 - Company Checking Account
Currency: USD

Payment Amount: 1,136.00
Unapplied Balance: 0.00
Application Amount: 0.00
Finance Charges: 0.00

Branch	Batch Number	Doc. Type	Reference Nbr.	Currency	Amount Paid	Cash Discount Taken	With. Tax	Amount Paid (USD)	Cash Discount Taken (USD)	With. Tax (USD)	Cross Rate	Inventory ID	Application Period	Application Date
PRODWHOLE	AP007440	Bill	005930	EUR	1,000.00	0.00	0.00	1,136.00	0.00	0.00	1.13600000		11-2025	11/17/2025

Figure: The released AP payment

On the **Application History** tab (shown above), you can see the currency of the applied bill in the **Currency** column. The **Amount Paid (USD)** column shows the bill's amount in the payment currency, which is USD.

Processing a Bank Statement

When you create a payment based on a bank statement for a bill or invoice in a foreign currency, you can specify the amount paid in the document currency. If you're creating a payment in a foreign currency from a bank account in the base currency, you can enter the direct or reciprocal cross rate from the bank statement.

Example

A bank statement for November 2025 contains a receipt for EUR 1000. It was received to a USD bank account at an exchange rate of 1 euro to 1.07 US dollars, resulting in a transaction amount of USD 1070. You need to create an AR payment based on this transaction as follows:

- On the [Process Bank Transactions \(CA306000\)](#) form, select the foreign currency payment in the left pane (see Item 1 below).
- On the **Create Payment** tab, select the **Create** check box (Item 2). In the **Module** box, select **AR** (Item 3).

3. In the **Business Account** box, select the customer (Item 4) and click **Load Documents**.

Below you can see the bank transaction with the settings of the AR payment that will be created.

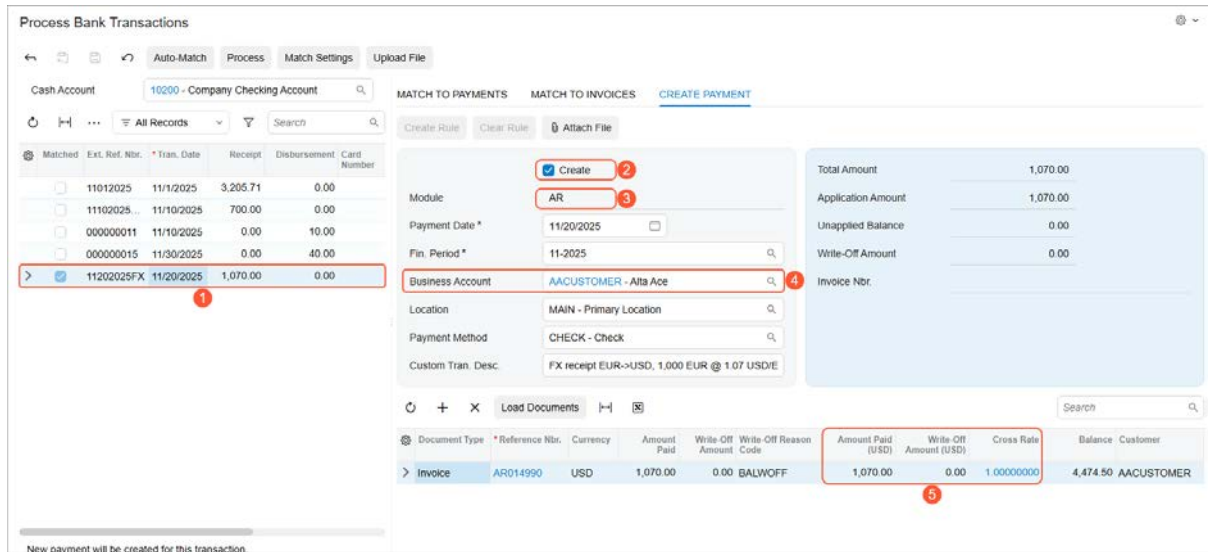


Figure: The bank transaction and the AR payment settings

4. On the form toolbar, click **Process** to create the payment.

On the *Process Bank Transactions* form, the table on the **Create Payment** tab shows the invoice to which the created payment will be applied. The table now contains these new columns:

- **Amount Paid (<Payment_currency>):** The amount in the payment currency. In the example above, the payment currency is USD.
- **Write-Off Amount (<Payment_currency>):** The amount of the write-off in the payment currency. In the example above, the payment currency is USD.
- **Cross Rate:** The cross rate at which the **Amount** and **Amount Paid (<Payment_currency>)** columns are calculated.

i The **Write-Off Amount (<Payment_currency>)** and **Cross Rate** columns are hidden by default. You can add them to the table by clicking the Column Configuration button and then selecting these columns and clicking **OK** in the Column Configuration dialog box.

Below you can see the created AR payment and its application to a customer's invoice.

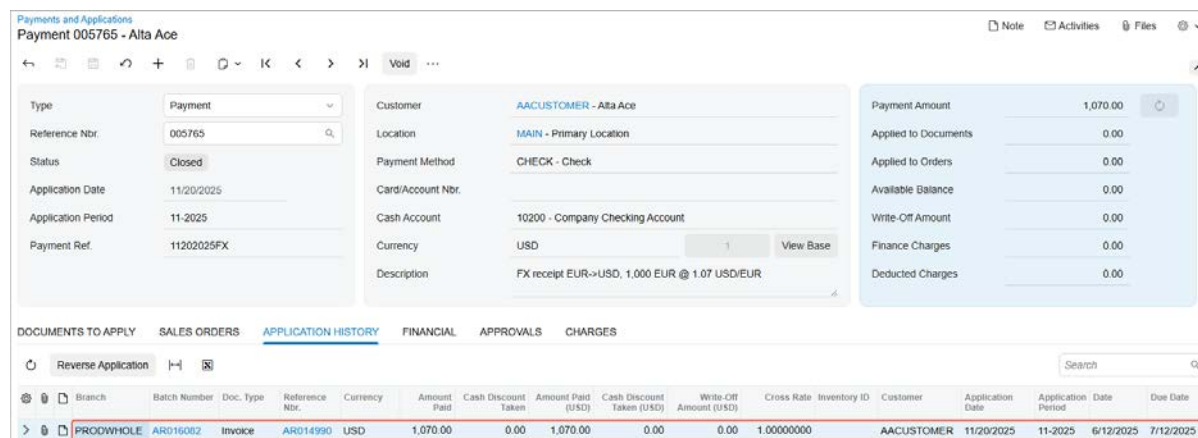


Figure: The AR payment created based on a bank transaction

Selecting the Cross Rate

On the [Payments and Applications](#) (AR302000), [Checks and Payments](#) (AP302000), and [Process Bank Transactions](#) (CA306000) forms, the value in the **Cross Rate** column is now a link.

If you click this link, the system opens the **Cross Rate Selection** dialog box:

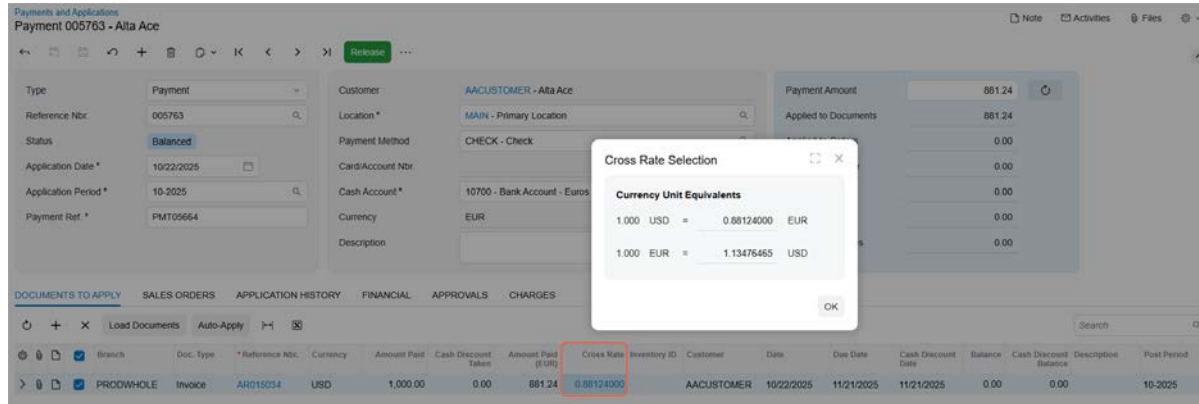


Figure: Selecting a cross rate for an AR payment

This dialog box contains the **Currency Unit Equivalents** section, which includes the default direct and reciprocal rates. In this dialog box, you can update the reciprocal rate, and the system will recalculate the direct rate. If you change the direct rate, the system will recalculate the reciprocal rate.

Summary of UI Changes

The tables below summarize the UI changes related to multicurrency payments on the noted forms.

Payments and Applications Form

You'll find the following changes on the **Documents to Apply** tab of the [Payments and Applications](#) (AR302000) form.

Column Name	What Changed	Default Visibility	Dependence on the <i>Multicurrency Accounting</i> Feature
Amount Paid (<Payment currency>)	Renamed from Amount Paid	Visible	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Amount Paid	New	Visible	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
Cash Discount Taken (<Payment currency>)	Renamed from Cash Discount Taken	Hidden	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Cash Discount Taken	New	Hidden	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
Write-Off Amount (<Payment currency>)	Renamed from Write-Off Amount	Hidden	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Write-Off Amount	New	Hidden	Appears if the <i>Multicurrency Accounting</i> feature is enabled.

Column Name	What Changed	Default Visibility	Dependence on the <i>Multicurrency Accounting</i> Feature
Cross Rate	Contains a value that's a link to the Cross Rate Selection dialog box	Visible	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled. If the feature is disabled, the value is 1 and can't be changed.

Checks and Payments Form

You'll find the following changes on the **Documents to Apply** tab of the [Checks and Payments](#) (AP302000) form.

Column Name	What Changed	Default Visibility	Dependence on the <i>Multicurrency Accounting</i> Feature
Amount Paid (<Payment currency>)	Renamed from Amount Paid	Visible	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Amount Paid	New	Visible	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
Cash Discount Taken (<Payment currency>)	Renamed from Cash Discount Taken	Hidden	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Cash Discount Taken	New	Hidden	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
With. Tax (<Payment currency>)	Renamed from With. Tax	Hidden	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
With. Tax	New	Hidden	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
Cross Rate	Contains a value that's a link to the Cross Rate Selection dialog box	Visible	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled. If the feature is disabled, the value is 1 and can't be changed.

Process Bank Transactions Form

You'll find the following changes on the **Create Payment** tab of the [Process Bank Transactions](#) (CA306000) form. These changes apply if AR or AP is selected in the **Module** box of this tab.

Column Name	What Changed	Default Visibility	Dependence on the <i>Multicurrency Accounting</i> Feature
Amount Paid (<Payment currency>)	Renamed from Amount Paid	Visible	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Amount Paid	New	Visible	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
Cash Discount Taken (<Payment currency>)	Renamed from Cash Discount Taken	Hidden	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Cash Discount Taken	New	Hidden	Appears if the <i>Multicurrency Accounting</i> feature is enabled.

Column Name	What Changed	Default Visibility	Dependence on the <i>Multicurrency Accounting</i> Feature
With. Tax (<Payment currency>)	Renamed from With. Tax	Hidden	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
With. Tax	New	Hidden	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
Write-Off Amount (<Payment currency>)	Renamed from Write-Off Amount	Hidden	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled.
Write-Off Amount	New	Hidden	Appears if the <i>Multicurrency Accounting</i> feature is enabled.
Cross Rate	Contains a value that's a link to the Cross Rate Selection dialog box	Visible	Appears whether or not the <i>Multicurrency Accounting</i> feature is enabled. If the feature is disabled, the value is 1 and can't be changed.

Key Takeaways

- You enter the payment amount directly in the document currency—no more manual cross-rate conversions or tedious recalculations.
- You can now view the exact cross rate used for customer or vendor payments and enter a direct or reciprocal rate for full control over currency conversions.
- These enhancements reduce rounding gain or loss discrepancies, minimize manual adjustments, and help finance teams process international transactions faster.

Learn More

See these topics for more information:

- Accounts Receivable: [Multicurrency Payment of Invoices: Entry of the Payment Amount Instead of the Cross Rate](#) and [Multicurrency Payment of Invoices: To Change the Payment Amount Instead of the Cross Rate](#)
- Accounts Payable: [Multicurrency Payment of Bills: Entry of the Payment Amount Instead of the Cross Rate](#) and [Multicurrency Payment of Bills: To Change the Payment Amount Instead of Cross Rate](#)
- Bank Reconciliation: [Bank Reconciliation: Reconciling Transactions in Foreign Currencies](#)

Finance: Excel-Based Financial Reporting with InsightXL

Financial reports don't have to be "power-user only." With InsightXL, you can take the ARM reports you already rely on and work with them in Microsoft Excel—where many accountants are most comfortable—while keeping the connection to the data source in Acumatica ERP. Export an ARM report to Excel or build one from scratch, adjust report parameters as needed, and refresh values on demand to pull the latest amounts from Acumatica ERP into your workbook.

This helps you handle most common financial reporting scenarios in Excel while still relying on up-to-date data from Acumatica ERP.



These capabilities are available only if the *InsightXL (Excel-Based Financial Reporting)* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Add-In Installation Process

To use the Excel add-in, an administrator performs a one-time setup that includes the following steps:

1. [Set up HTTPS for the Acumatica ERP instance](#)
2. [Configure an OpenID provider](#)
3. Make adjustments to the `web.config` file
4. Download the add-in manifest from Acumatica and place it in a shared location
5. Grant access rights to the users who will run the add-in
6. Install the add-in in Excel

For instructions on setting up HTTPS for an instance and configuring an OpenID provider, see the links above. Read on to learn about Steps 3 to 6.

Making Adjustments to Web.config

Modify the settings in the `web.config` file (located in the application instance folder) as follows:

- Add the text in bold to the `<formsAuth>` tag of the `<px.core>` section.

```
<formsAuth loginUrl="Frames/Login.aspx" timeout="60" requireSSL="true" />
```

- Add the text in bold to the `<sessionState>` tag of the `<system.web>` section.

```
<sessionState cookieSameSite="None" cookieless="UseCookies" mode="Custom"
customProvider="PXSessionStateStore" timeout="60"
sessionIDManagerType="PX.Owin.SessionIdManager, PX.Owin">
```

- In the `<system.web>` section, add the following line before the `<compilation>` tag.

```
<httpCookies sameSite="None" requireSSL="true" />
```



When you insert the line, note that:

- The first two occurrences of the `<system.web>` section within the `<location>` tag are not the sections you need.
- Insert the line only once; otherwise, a compilation error may occur when the site is restarted.

Downloading the Add-In Manifest

Once you've configured an OpenID provider, download the add-in manifest on the [Site Preferences](#) (SM200505) form. To do this, click the *Get Excel Add-In Manifest* link in the **Export to Excel** section.

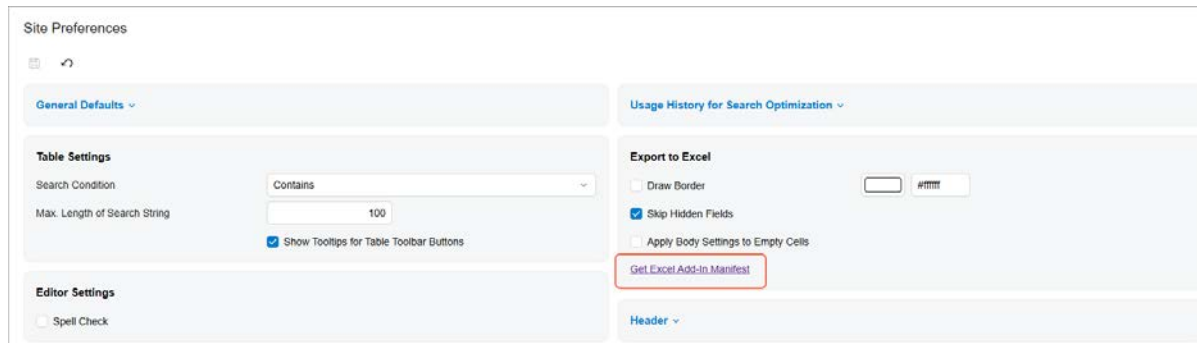


Figure: The manifest download link

Place the downloaded manifest file in a shared folder on a network server (such as \\MyServer\Share\AddIns) where add-in users can access it.

Granting Access to the Add-In Panel

Make sure that users of the Excel add-in have access rights to the *Excel Add-In (EX000000)* form. This form displays information in the add-in's right panel in Excel, including details about the add-in's connection, status, and settings.

You can modify access rights by using any of the following forms:

- [Access Rights by Role](#) (SM201025)
- [Access Rights by User](#) (SM201055)
- [Access Rights by Screen](#) (SM201020)

Configuring the Add-In in the Excel Desktop App

Once the manifest has been downloaded and placed in a shared folder, you can install the add-in in Excel.

To install the add-in in the Excel desktop app, add the shared folder to the list of trusted add-in catalogs as follows:

1. Open the **Excel Options** dialog box by clicking **File > Options**.
2. Open the **Trust Center** by opening the **Trust Center** tab (Item 1 below) and clicking **Trust Center Settings** (Item 2).
3. In the **Trust Center** dialog box, open the **Trusted Add-in Catalogs** tab (Item 3), and add the shared folder to the **Trusted Catalogs** table (Item 4).
4. Click **OK** (Item 5).

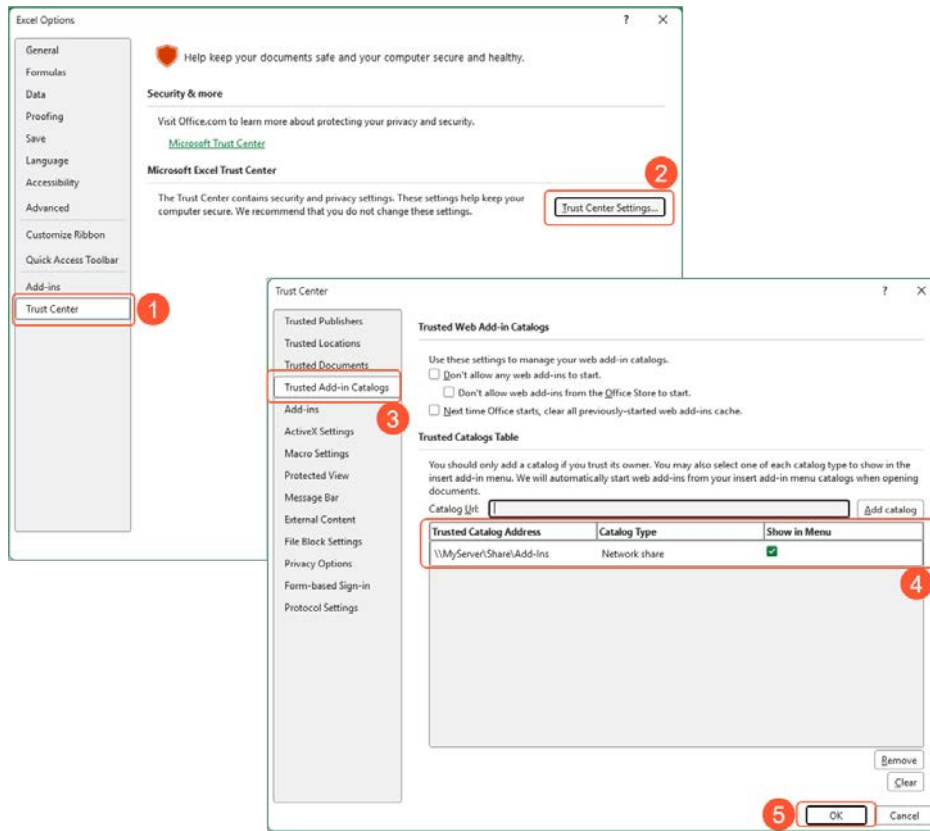


Figure: Specifying the path to the add-in manifest



Select the **Next time Office starts, clear all previously started web add-ins cache** check box to avoid issues with starting the add-in after installation. Then make sure to close all Excel windows to restart the app.

After you reopen Excel, you can add the add-in to the **Home** tab by clicking **Home > Add-ins > Advanced** (Items 1–3 below) and selecting the add-in from the list of available add-ins (Item 4). Click **Add** (Item 5).

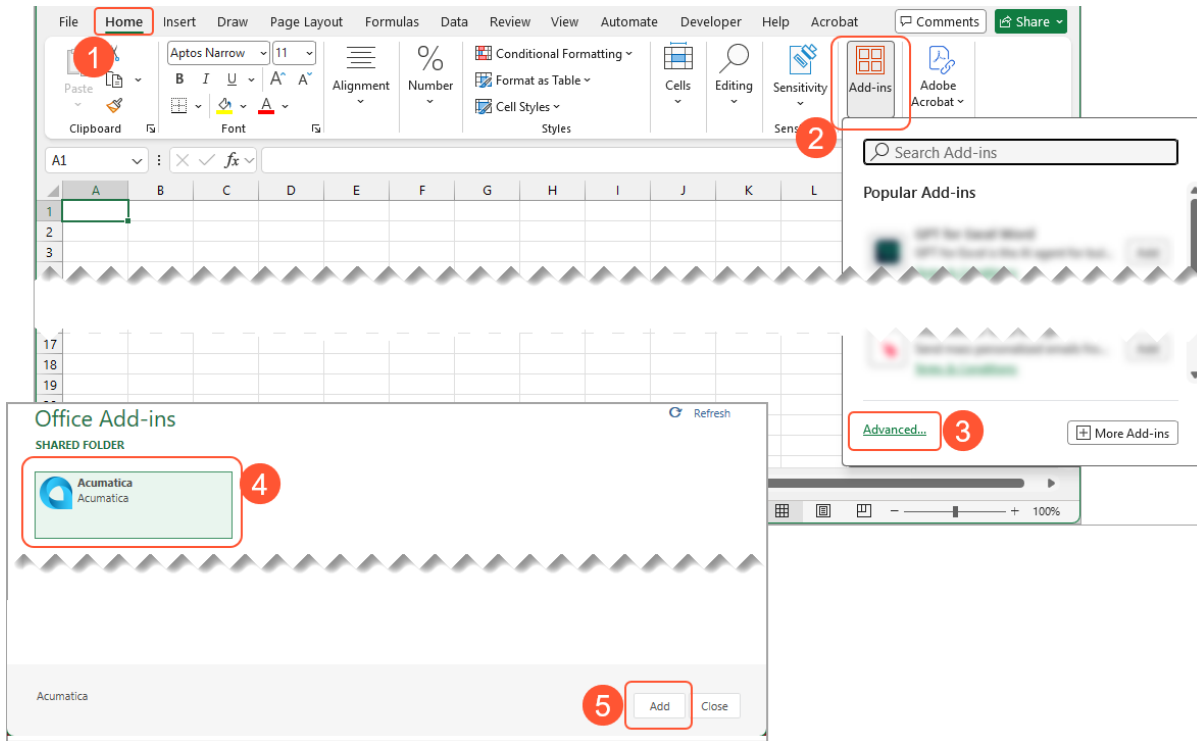


Figure: Adding the add-in to the ribbon

Configuring the Add-In in the Excel Browser App

To install the add-in in the Excel browser app, do the following:

1. Open the **Office Add-ins** dialog box by clicking **Home > Add-ins** and then clicking **Advanced** (Items 1–3 below).
2. Click **Upload My Add-in** (Item 4) and then select and upload the add-in manifest that you previously downloaded (Items 5–6).

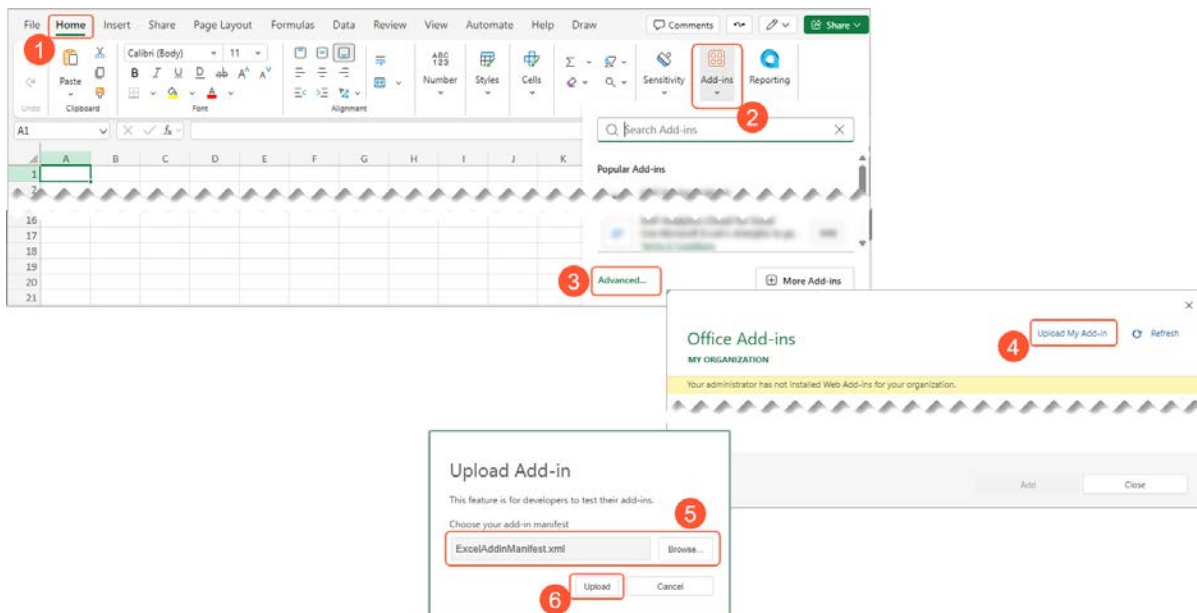


Figure: Installing the add-in in the browser app

Using the Add-In

Once the add-in has been installed, you'll see the **Acumatica** tab, the **Reporting** button on the **Home** tab, and the **Acumatica** panel.

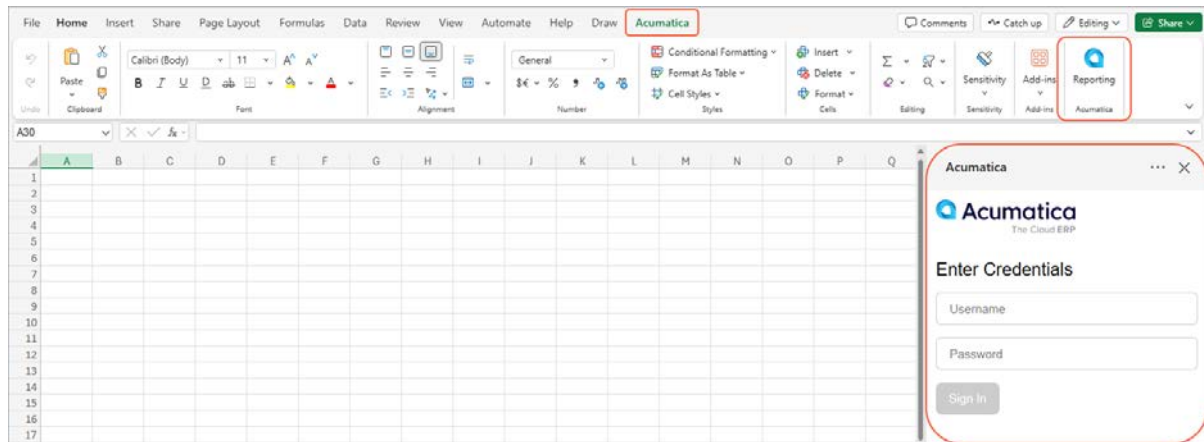


Figure: The add-in's tab, button, and panel

The following screenshot shows the buttons on the **Acumatica** tab.

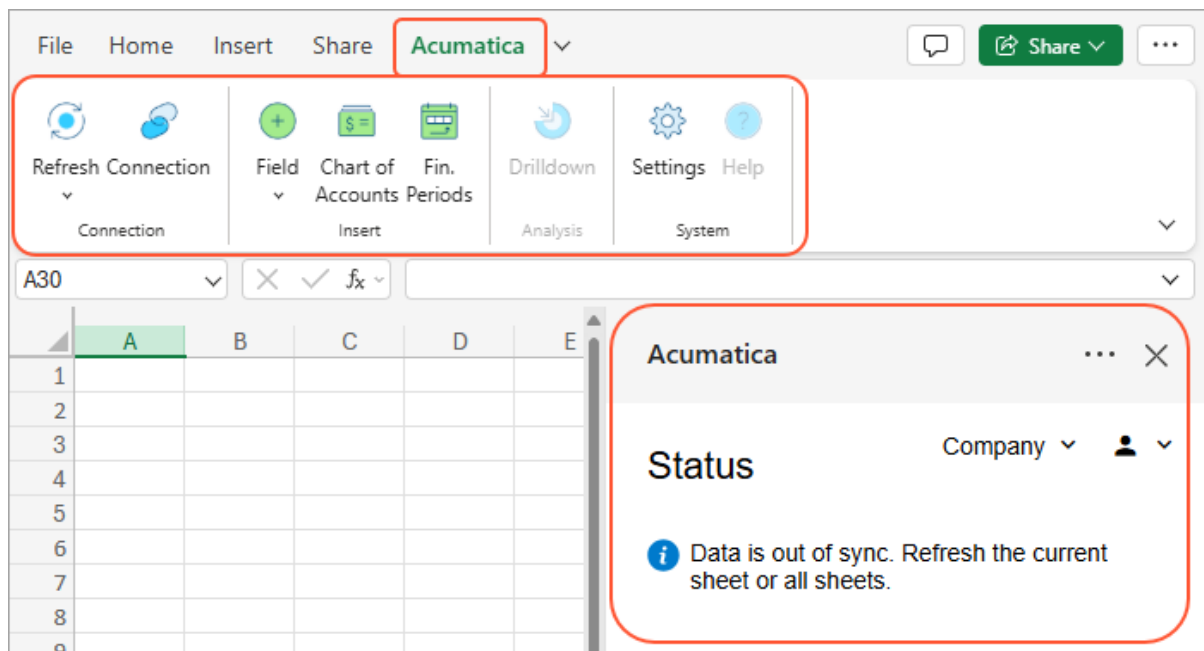


Figure: The Acumatica tab toolbar and add-in panel

Here's what you can do with these buttons.

Connect to Acumatica ERP

Click **Connection** to open the right panel and sign in to Acumatica ERP. When you're signed in, this panel displays the status of the workbook synchronization and informs you if displayed data needs to be refreshed. If you have access to multiple tenants, you can also switch between these tenants in this panel.

Refresh Values in Excel by Pulling Data from Acumatica ERP

When you refresh, the add-in groups the Acumatica ERP functions found in the sheet or workbook and sends them to the server, where they're calculated by the ARM engine. The calculated values are sent back to Excel. The add-in then identifies any other functions (for example, Excel functions) that reference those values, recalculates formulas containing those functions, and inserts the results into the appropriate cells.

Before you start a refresh, make sure that no cell is selected for editing. While the refresh is in progress, you can monitor its status and progress in the right panel.

You can control the scope of the refresh in your workbook by clicking the needed menu command:

- **Pending and Errors:** Refresh recently changed but not-yet-calculated cells or cells with errors in the current sheet.
- **Current Sheet:** Refresh only the active sheet.
- **All Sheets:** Refresh the entire workbook.
- **Cancel Refresh:** Cancel a refresh if it takes too long.

Insert Helper Functions

The add-in includes the **Insert** group of actions, which place supported functions into the worksheet in the cell you're working in:

- **Field:** Inserts a drop-down list in Excel sourced from related entities in Acumatica ERP, such as account class, account, company, branch, ledger, and financial period.
- **Chart of Accounts:** Expands an array of accounts by inserting them into the selected cell and the cells below it.
- **Fin. Periods:** Expands an array of periods by inserting them into the selected cell and the cells to the right of it.

Drill down into calculated values to see the underlying data

Click a cell that contains a calculated *Beginning Balance*, *Debit*, *Credit*, *Turnover*, or *Ending Balance* value, and then click **Drilldown**. This opens a new sheet named **Drilldown** with the underlying data.



You can have only one drilldown sheet for a workbook. If you select a different cell and click **Drilldown**, the existing drilldown sheet will be deleted, and a new one will be created for the selected cell.

Exporting ARM Reports to Excel

You can export an existing ARM report to Excel by clicking **Export > Excel (Connected)** on the report toolbar. The report is exported along with the functions used to calculate amount values and formulas used in the report cells.

The screenshot shows a web interface for a Balance Sheet report. The report title is "Revision Two Products Balance Sheet As of February 28, 2026". The interface includes navigation buttons (Print, Email, Export) and a search bar. The "Export" menu is open, showing options for "Excel", "Excel (Connected)", and "Pdf". The "Excel (Connected)" option is highlighted with a red box. The background shows a table with financial data for Assets, categorized into Current Assets and Property, Plant and Equipment.

Revision Two Products	
Balance Sheet	
As of February 28, 2026	
Assets	
Current Assets	
Cash & Cash Equivalents	233,711,813.79
Accounts Receivable	10,383,476.65
Inventories	16,865,682.08
WIP	20,311.22
Due from Related	(101,144,173.78)
Other Current Assets	319,762.82
Total Current Assets	160,156,872.78
Property, Plant and Equipment	8,163,299.99
Accumulated Depreciation	(676,050.00)
Total Assets	167,644,122.77

Figure: The new export command

Supported Functions

The table below provides an overview of all financial functions available with InsightXL. For the description of all functions along with their arguments, see the product documentation.

These functions are available in the **Insert Function** wizard in Excel under the **Acumatica** category.

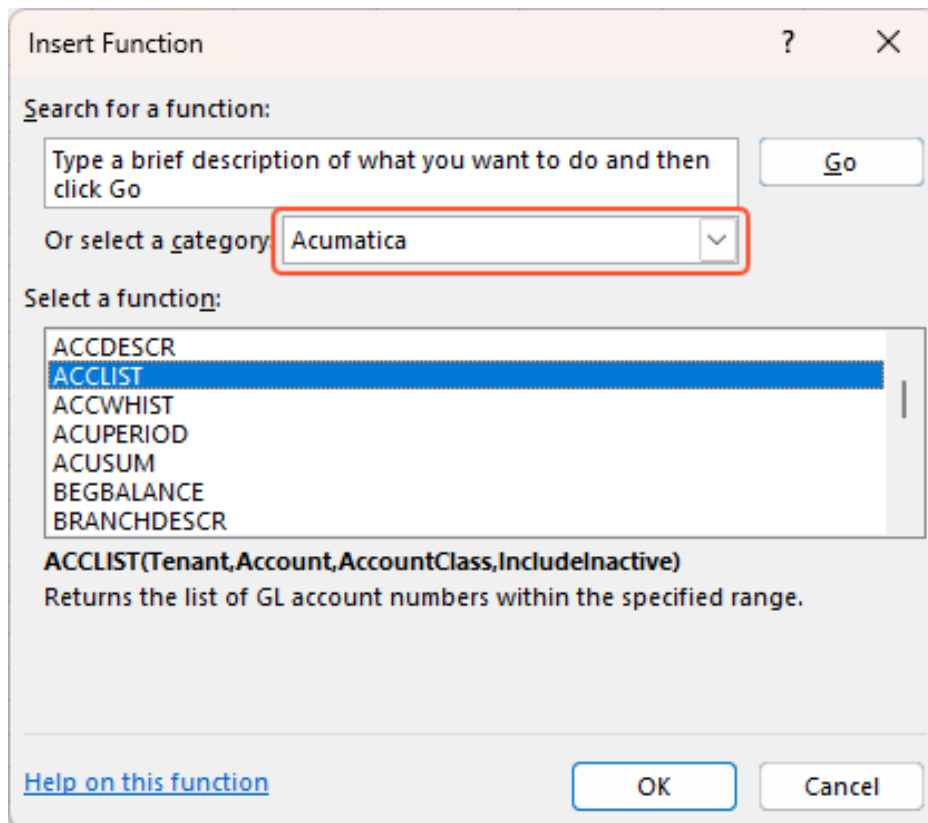


Figure: The Acumatica function category

Table: Functions in InsightXL

Name	Description
Financial Entities: Lists and Descriptions	
COMPANYDESCR (Tenant, Company)	Returns the company description for the specified company.
BRANCHLIST (Tenant, Company)	Returns the list of branches of the specified company.
BRANCHDESCR (Tenant, Branch)	Returns the branch description for the specified branch.
ACCCLASSDESCR (Tenant, AccountClass)	Returns the account class description for the specified account class.
ACCCLASSFORACC (Tenant, Account)	Returns the account class for the specified account.
ACCCLASSLIST (Tenant, AccountClass)	Returns the list of GL account classes within the specified range.
ACCLIST (Tenant, Account, AccountClass, IncludeInactive)	Returns the list of GL account numbers that belong to the specified range of accounts or are assigned to the specified account classes.
ACCDESCR (Tenant, Account)	Returns the account description for the specified account.
SUBACCLIST (Tenant, SubAccount, IncludeInactive)	Returns the list of GL subaccounts within the specified range.
SUBACCDESCR (Tenant, SubAccount)	Returns the subaccount description for the specified subaccount.
Financial Entities: Expands	
EXPANDCOMPANY (Tenant, Company, AddDescr)	Returns the array of companies and their descriptions.
EXPANDBRANCH (Tenant, Company, Branch, AddDescr)	Returns the array of branches assigned to the specified company and their descriptions.
EXPANDLEDGER (Tenant, Ledger, AddDescr)	Returns the array of ledgers and their descriptions.
EXPANDACCCLASS (Tenant, AccountClass, AddDescr)	Returns the array of GL account classes within the specified range and their descriptions.
EXPANDACC (Tenant, Account, AccountClass, IncludeInactive, AddDescr)	Returns the array of GL account numbers within the specified range of accounts or account classes, along with their descriptions.

Name	Description
EXPANDSUBACC (Tenant, SubAccount, IncludeInactive, AddDescr)	Returns the array of GL subaccounts within the specified range and their descriptions.
EXPANDFINPERIOD (Tenant, Company, FinPeriod, UseMasterFinCalendar)	Returns the array of financial periods within the specified range.
Amount Types	
BEGBALANCE (Tenant, Company, Branch, Ledger, AccountClass, Account, SubAccount, FinPeriod, UseAccountCurrency, UseMasterFinCalendar)	Returns the beginning balance in the base currency or the account currency of the specified GL accounts for the specified branch and financial period.
ENDBALANCE (Tenant, Company, Branch, Ledger, AccountClass, Account, SubAccount, FinPeriod, UseAccountCurrency, UseMasterFinCalendar)	Returns the ending balance in the base currency or the account currency of the specified GL accounts for a given branch and financial period.
DEBIT (Tenant, Company, Branch, Ledger, AccountClass, Account, SubAccount, FinPeriod, UseAccountCurrency, UseMasterFinCalendar)	Returns the debit balance in the base currency or the account currency of the specified GL accounts for a given branch and financial period.
CREDIT (Tenant, Company, Branch, Ledger, AccountClass, Account, SubAccount, FinPeriod, UseAccountCurrency, UseMasterFinCalendar)	Returns the credit balance in the base currency or the account currency of the specified GL accounts for a given branch and financial period.
TURNOVER (Tenant, Company, Branch, Ledger, AccountClass, Account, SubAccount, FinPeriod, UseAccountCurrency, UseMasterFinCalendar)	Returns the turnover amount in the base currency or the account currency for the specified GL accounts for a given branch and financial period.
Financial Periods	
FINPERIODLIST (Tenant, Company, FinPeriod, UseMasterFinCalendar)	Returns the list of financial periods within the specified range.
FINPERIODSTART (Tenant, Company, FinPeriod, UseMasterFinCalendar)	Returns the Excel date value for the start date of the specified financial period.

Name	Description
FINPERIODEND (Tenant, Company, FinPeriod, UseMasterFinCalendar)	Returns the Excel date value for the end date of the specified financial period.
FINPERIODBYDATE (Tenant, Company, Date, UseMasterFinCalendar)	Returns the financial period for the specified date.
FINPERIODBYPERIOD (Tenant, Company, Year, FinPeriod, UseMasterFinCalendar)	Returns the matching financial period for the specified year and period number.

Finance: Improvements in Customer and Vendor Payment Methods

Beginning in Acumatica ERP 2026 R1, you can control how users enter customer and vendor payment method details. With controls that fit the data being entered, data entry becomes more intuitive and consistent. Users can now enter this data by using **drop-down lists** and **date pickers**. As part of setup, you specify which control is used for each payment method detail.

These changes make payment method details easier for users to enter consistently and correctly across AR and AP—reducing errors and improving data quality.

Read on to learn which administrative settings are now available for payment methods and where they can be used.

How Your Users Will Benefit

With structured input options replacing text entry, users can enter payment method details quickly and confidently. Drop-down lists and date pickers guide users to valid values, ensure consistency, and deliver a smarter, smoother user experience.

Defining How Users Enter Payment Method Details

On the **Settings for Use in AR** and **Settings for Use in AP** tabs of the [Payment Methods](#) (CA204000) form, you can define how users enter payment method details. The columns shown below have been added to both tabs.

1. **Control Type:** In this column, you specify how users enter each payment setting. The following types are available:
 - *Text* (default): Users enter the value as plain text. This type is used for system-defined payment details, such as encrypted fields or card-related fields, and it can't be changed.
 - *Combo*: Users select the option from a drop-down list.
 - *Date*: Users select a date by using a date picker.

If *Combo* or *Date* is selected, formatting-related columns (**Entry Mask**, **Validation Reg. Exp.**, and **Display Mask**) are automatically cleared and unavailable.

If plug-ins add additional control types, the system will list these standard types (*Text*, *Combo*, and *Date*) at the top of the list.

2. **Attribute ID:** In this column, you select the attribute that provides values for the *Combo* control type. When you click the magnifier button, the system opens the lookup table. Here you can link this record to an existing attribute that also uses the *Combo* control type.
3. **Default Value:** In this column, you can specify the default value for the *Combo* control type. The drop-down list in this column displays the list of allowed values for the selected attribute.

Payment Methods
SEPALAST - SEPA Direct Debits

Payment Method ID *

Active

Means of Payment

Description *

Use in AP
 Use in AR
 Use in PR
 Set Payment Date to Bank Transaction Date
 Require Remittance Information for Cash Account

ALLOWED CASH ACCOUNTS SETTINGS FOR USE IN AR SETTINGS FOR USE IN AP

Integrated Processing
 Require Card/Account Number
 Has Billing Information

Void Using Clearing Account
 Use Document Date as Void Date
 Send Payment Receipts Automatically

Payment Method Details

ID	Description	Required	Encrypted	Sort Order	Entry Mask	Validation Reg. Exp.	Control Type	* Attribute ID	Default Value
TYPE	Type of Debit Note	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1			Combo	TYPEDD	
USAGE	Type of Usage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2			Combo	USAGEDD	Recurring
CREATED	Created on	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3			Date		

1 2 3

Figure: The Settings for Use in AR tab

Payment Methods
SEPALAST - SEPA Direct Debits

Payment Method ID *

Active

Means of Payment

Description *

Use in AP
 Use in AR
 Use in PR
 Set Payment Date to Bank Transaction Date
 Require Remittance Information for Cash Account

ALLOWED CASH ACCOUNTS SETTINGS FOR USE IN AR SETTINGS FOR USE IN AP REMITTANCE SETTINGS

Additional Processing

Print Checks
 Create Batch Payments
 Not Required

Payment Settings

Require Unique Payment Ref.

Payment Method Details

ID	Description	Required	Sort Order	Entry Mask	Validation Reg. Exp.	Control Type	Attribute ID	Default Value
1	date	<input type="checkbox"/>				Date		
2	Acc type	<input checked="" type="checkbox"/>				Combo	ACCTYPE	Market Account
3	Account number	<input checked="" type="checkbox"/>				Text		

1 2 3

Figure: The Settings for Use in AP tab

Where These Settings Are Used

The new configuration applies to payment methods used in AR and AP. When users enter or edit payment method details, the system now uses these settings on the following forms:

- [Customer Payment Methods](#) (AR303010) form, **Payment Method Details** tab
- [Vendors](#) (AP303000) form, **Payment** tab
- [Vendor Locations](#) (AP303010) form, **Payment** tab

The customer payment method shown below includes the payment method details set up on the **Settings for Use in AR** tab of the [Payment Methods](#) (CA204000) form.

The screenshot displays the 'Customer Payment Methods' form for 'AACUSTOMER - Alta Ace'. The 'Payment Method' is 'SEPALAST - SEPA Direct Debits', which is marked as 'Active'. Below this, the 'PAYMENT METHOD DETAILS' section is visible, containing a table with the following data:

Description	Value
Type of Debit Note	Core direct debit
Type of Usage	Recurring
Created on	11/17/2025

Figure: The settings of a customer payment method

The vendor payment instructions shown below include the payment method details set up on the **Settings for Use in AP** tab of the [Payment Methods](#) form.

Vendors
AAVENDOR - Goto Vendor Inc

Vendor ID * AAVENDOR
Account Name * Goto Vendor Inc
Vendor Status Active

Balance 0.00
Prepayment Balance 0.00
Retained Balance 0.00

GENERAL FINANCIAL **PAYMENT** PURCHASE SETTINGS ATTRIBUTES LOCATIONS CONTACTS ACTIVITIES GL ACCOUNTS MAILING & PRINTING

Remit-To Address
Address Lookup
Country US - United States of America

Remit-To Info
 Override
Account Name Goto Vendor Inc
Attention
Email purchase@gotovend.com
Web
Business 1 +1 (816) 222-0066
Business 2

Default Payment Settings
Payment Method SEPALAST - SEPA Direct Debits
Cash Account
Payment By Discount Date
Payment Lead Time (Days) 0
Pay to Vendor
 Pay Separately
 Pay by Line
Prepayment Percent 100.000000

Payment Instructions

Description	Value
date	11/1/2025
Acc.type	Market Account
Account number	DE893704 0044 0532 0130 00

Figure: The settings of a vendor's payment method

Finance: Schedule Depreciation Method Changes by Period

Sometimes your company decides to adopt a new depreciation approach that will start next year or next quarter. With Acumatica ERP 2026 R1, you can schedule the change so that the system continues from that point forward —**without adjusting the depreciation amounts that have already been posted.**

You can now plan depreciation method changes for fixed assets by period. When you switch methods for future periods, previously posted depreciation is left as-is, past periods aren't recalculated just because you've changed the method going forward.

For each fixed asset book, you maintain a list of applicable depreciation methods. Each method has its own **Start Period**, which determines when it takes effect.



This functionality is available if the *Fixed Assets* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn how to set up and use this functionality.

Supported Depreciation Methods

Multiple-method scheduling is available for the depreciation methods that have been migrated to the new depreciation engine. The table below lists these methods and their averaging conventions.

Depreciation Method	Averaging Convention
<i>Straight-Line</i>	<i>Full Period</i>
<i>Straight-Line</i>	<i>Full Day</i>
<i>Australian Prime Cost</i>	<i>Full Day</i>
<i>Australian Diminishing Value</i>	<i>Full Day</i>
<i>New Zealand Diminishing Value</i>	<i>Full Period</i>
<i>New Zealand Straight-Line</i>	<i>Full Period</i>
<i>Dutch Method 2</i>	<i>Full Period</i>
<i>Remaining Value by Days in Period</i>	<i>Full Day</i>
<i>Remaining Value</i>	<i>Full Period</i>

Setting Up Multiple Depreciation Methods

The setup of multiple depreciation methods involves two key steps:

1. **Update the fixed asset preferences.**

On the [Fixed Assets Preferences](#) (FA101000) form, select the **Allow Multiple Depreciation Methods** check box.

Fixed Assets Preferences

Account Settings

FA Accrual Account * 15999 - Fixed Asset Clearing Account

FA Accrual Sub. * 000-000 - Default

Proceeds Account 11010 - AR Accrual Account

Proceeds Subaccount 000-000 - Default

Other

Depreciation History View By Book

Depreciate in Disposal Period

Show Accurate Depreciation

Require Full Reconciliation before Disposal

Allow to Modify Predefined Depreciation Methods

Allow Multiple Depreciation Methods

Numbering Settings


Transaction Numbering Sequence FAREGISTER - Fixed Asset Document Register

Asset Numbering Sequence * FASSET - Fixed Asset

Batch Numbering Sequence BATCHFA - FA Batch

Posting Settings

Figure: The new check box

 You can't clear this check box if any non-reversed assets already use multiple methods.

2. Turn on multiple-method tracking for any needed book.

On the *Fixed Assets* (FA303000) form, turn on multiple-method tracking for any book by selecting the new **Multiple Methods** check box on the **Balance** tab. (Each row in the table represents a book.)

When you select the **Multiple Methods** check box is selected for a book, the new **Applicable Methods** table appears at the bottom of the **Balance** tab. In this table, you define the method schedule for the selected book.

Fixed Assets
00000020 - Fixed Asset - Office furniture (table)

Asset ID: 00000020, Description: Fixed Asset - Office furniture (table), Parent Asset:

Tabs: GENERAL, GL ACCOUNTS, **BALANCE**, COMPONENTS, OTHER INFO, DEPRECIATION, TRANSACTIONS, LOCATIONS, RECONCILIATION

Book	Depreciation Method	Status	Posting Book	* Depr. From	Depr. From Period	Last Depr. Period	Depr. to Period	Orig. Acquisition Cost	Current Cost	Business Use, %	Base	Salvage Amount	Accum. Depr.	Net Value	Useful Life, Years	ADS Life, Years	Averaging Convention	Mid-Period Type	Mid-Period Day	Multiple Methods
BOOK2	SL	Active		2/9/2026	02-2026		01-2036	500.00	500.00	100.0000	500.00	0.00	0.00	500.00	10.0000	10.00	Full Period	Fixed Day	15	<input type="checkbox"/>
BOOK3	SL	Active		2/9/2026	11-2025		10-2035	500.00	500.00	100.0000	500.00	0.00	0.00	500.00	10.0000	10.00	Full Period	Number of Days	14	<input type="checkbox"/>
POSTING	RV	Active	<input checked="" type="checkbox"/>	2/9/2026	02-2026	02-2026	01-2036	500.00	500.00	100.0000	500.00	0.00	4.17	495.83	10.0000	10.00	Full Period	Fixed Day	15	<input checked="" type="checkbox"/>

Applicable Methods

Start Period	Depreciation Method	Percent per Year	Useful Life (Years)
> 02-2026	SL		10.0000
03-2026	RV		10.0000

Figure: The new UI elements on the Fixed Assets form

Defining Applicable Methods

In the **Applicable Methods** table, you define each depreciation method that will apply during the asset's life cycle for that book. Each row is associated with a start period.

Key points to know:

- The **Start Period** of the first row is copied from the asset's **Depr. From Period** and can't be changed.

- You can add additional methods for later periods. (Each additional method must have a unique **Start Period** within the asset's depreciation range.)

Changing the Depreciation Method for Future Periods

To apply a new depreciation method starting in a future period:

1. Open the fixed asset on the *Fixed Assets* (FA303000) form.
2. In the **Applicable Methods** table on the **Balance** tab, add a new row.
3. In the **Start Period** column, specify the first period in which the new method should apply.
4. In the **Depreciation Method** column, select the needed method.
5. Specify related settings, such as **Percent Per Year**, where applicable.

Conditions and System Safeguards

When you work with multiple depreciation methods, certain conditions must be met. The system also applies safeguards to protect previously posted depreciation and keep depreciation schedules consistent.

When the Multiple Methods Check Box Is Unavailable

You can't select this check box if:

- The system doesn't support the combination of the current depreciation method and averaging convention.
- The asset has the **Depreciable** check box cleared on the **General** tab of the *Fixed Assets* (FA303000) form.
- The asset's **Placed-In-Service Date** is still editable. This indicates that the asset must be depreciated at least partially for the book, which will make that date non-editable.
- The asset's status is *Fully Depreciated*, *Disposed*, or *Reversed*.



If the asset is fully depreciated in one book but not in another and still has the *Active* status, you can edit the list of applicable methods in all the asset's books, including the one where the asset is fully depreciated.

Rules for Managing the Applicable Methods List

The following rules apply to the list of applicable methods:

- You can delete any row in the **Applicable Methods** table except the first one with the earliest **Start Period**.
- If the table contains more than one method, the **Multiple Methods** check box becomes selected and unavailable. Thus, to return to a single method, you must first delete all rows except the first one.
- If you reduce the asset's useful life so that the depreciation end period would fall earlier than the last method's **Start Period**, the system will block the change and tell you to adjust the method list first.

Assets Under Construction

If an asset class has the **Under Construction** check box selected on the *Fixed Asset Classes* (FA201000) form, you can't configure multiple methods for any asset of this class. You must move the asset to a class that isn't under construction before you can add multiple methods.

Net Value and Salvage Amount

Regardless of whether an asset is depreciated by using a single method or multiple methods, depreciation stops in either of the following cases:

- The asset's net value is less than its salvage amount.
- The net value has a sign opposite that of the salvage amount.



In previous versions of Acumatica ERP, for New Zealand and Australian methods, the system ignored the salvage amount during depreciation. This could result in the net value becoming lower than the salvage amount. If you want to preserve the previous system behavior, you must set the **Salvage Amount** box to 0 on the [Fixed Assets](#) (FA303000) form.

Independent Adjustment of the Useful Life and Percent Per Year

You can adjust the **Useful Life, Years** setting on the [Fixed Assets](#) (FA303000) form independently for all methods. Changing the **Percent Per Year** setting doesn't automatically recalculate the useful life anymore. This change affects New Zealand and Australian depreciation methods.

For straight-line methods, two situations are possible:

- If the useful life is longer than $100 / \text{Percent Per Year}$, the asset will be fully depreciated before the useful life ends. The remaining periods will have no depreciation.
- If the useful life is shorter than $100 / \text{Percent Per Year}$, the whole remaining value is depreciated in the last period.

Learn More

For more information, see [Asset Depreciation: Multiple Depreciation Methods for One Asset](#).

Finance: Prepayment Invoices in Accounts Payable

Everyday business operations often involve prepayments to vendors, particularly when suppliers require deposits before delivering goods or services. In some countries, legislation requires value-added taxes (VATs) to be recognized and reported in tax reports at the time a prepayment is paid.

To support these requirements, Acumatica ERP 2026 R1 introduces new functionality that allows you to create prepayment invoices in accounts payable with VAT recognition at payment time. When a prepayment invoice is paid, the system generates GL transactions for the calculated tax amounts, and these taxes are included in the corresponding tax report.

When the prepayment invoice is later applied to a vendor bill or a credit adjustment, the system reverses the previously recognized VAT amounts to prevent duplicate tax recognition.

Enabling the New Feature

On the [Enable/Disable Features](#) (CS100000) form, the new *VAT Recognition on AP Prepayments* feature has been introduced to support recognizing VAT when prepayments are paid in accounts payable (see below). Make sure that this feature is enabled before you proceed with the setup.



The similar feature that supports the creation of prepayment invoices in accounts receivable has been renamed to *VAT Recognition on AR Prepayments* (see below).

Enable/Disable Features

↶
Modify
Enable

Activation Status
Pending Activation

- Finance
 - Standard Financials
 - Multibranch Support
 - Multicompany Support
 - Business Account Locations
 - Multicurrency Accounting
 - Centralized Period Management
 - Volume Pricing
 - Expense Reclassification
 - Tax Entry from GL Module
 - VAT Reporting
 - VAT Recognition on AP Prepayments
 - VAT Recognition on AR Prepayments
 - 1099 Reporting
 - Net/Gross Entry Mode
 - Invoice Rounding
 - Expense Management
 - Advanced Financials

Figure: The features for VAT recognition on AP and AR prepayments

Specifying the Prepayment Invoice Numbering Sequence

On the **General** tab of the [Accounts Payable Preferences](#) (AP101000) form, you specify a dedicated numbering sequence in the **Prepayment Invoice Numbering Sequence** box. The system uses this sequence to assign reference numbers to prepayment invoices.

This box appears only when the *VAT Recognition on AP Prepayments* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

The screenshot shows the 'Accounts Payable Preferences' form with the 'GENERAL' tab selected. The 'Numbering Settings' section contains several dropdown menus for different invoice types. The 'Prepayment Invoice Numbering Sequence' field is highlighted with a red border and contains the value 'APBILL - AP Bill'. Other settings include 'Posting Settings' (Automatically Post on Release, Post Summary on Updating GL), 'Aging Settings' (7, 14, 30 days), 'Data Entry Settings' (Default Vendor Class ID, Payment Lead Time, Hold Documents on Entry, etc.), 'Retainage Settings', and 'VAT Recalculation Settings'.

Figure: Prepayment invoice numbering sequence

Setting Up the Prepayment Invoice Approval Workflow

You can set up a standard approval workflow for prepayment invoices.

On the **Approval** tab of the [Accounts Payable Preferences](#) form (AP101000), the *Prepmt. Invoice* option is available in the **Type** column if the *Recognition on AP Prepayments* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

The approval workflow setup process is similar to that used for other AP documents. For details, see [Specific Approvals: Accounts Payable Documents](#).

Specifying Tax Settings for Use in Prepayment Invoices

On the [Taxes](#) (TX205000) form, you must specify the tax settings that will be applied to prepayment invoices. On the **GL Accounts** tab, specify the following accounts for the tax:

- **Tax on AP Prepayment Account**
- **Tax on AP Prepayment Subaccount** (if applicable)

This account (and subaccount, if applicable) is used to record the VAT amount when a prepayment invoice is paid. When the payment application is released, the system credits the specified account for the VAT amount calculated

on the prepayment invoice, ensuring that this amount is recognized and reported in the appropriate tax period. When the prepayment invoice is later applied to a vendor bill or a credit adjustment, the system debits this account to prevent duplicate tax recognition.

Creating a Prepayment Invoice

To create a prepayment invoice on the *Bills and Adjustments* (AP301000) form, select *Prepmt. Invoice* in the **Type** box of the Summary area (see below).

The screenshot displays the 'Bills and Adjustments' form for creating a 'Prepmt. Invoice'. The 'Type' dropdown menu is open, showing options: Bill, Credit Adj., Debit Adj., Prepayment, and 'Prepmt. Invoice' (highlighted). The form includes fields for Vendor, Location, Currency (USD), Terms, Due Date, Cash Discount Date, Project (X - Non-Project Code), and Description. A summary panel on the right shows various totals: Detail Total, Line Discounts, Document Discounts, Retained Amount, Tax Total, Unpaid Balance, and Cash Discount, all set to 0.00. The bottom section shows a table with columns for Inventory ID, Transaction Descr., Quantity, UOM, Unit Cost, Ext. Cost, Discount Amount, Prepayment Percent, Prepayment Amount, Amount, Account, and Description.

Figure: The Prepmt. Invoice document type

When you add detail lines on the **Details** tab, the prepayment percent is inserted in each line (see below) as follows:

- If a prepayment percent is specified in the vendor settings, the system inserts this percent.
- If no prepayment percent is specified for the vendor, the system inserts a default prepayment percent of 0, and you must enter the required percent.

Once you've specified all document details and saved the prepayment invoice, the system calculates the balance and the total tax amount of the prepayment invoice. These amounts are displayed in the **Unpaid Balance** and **Tax Total** boxes (see below).

Bills and Adjustments
Prepm. Invoice 000199 - Société Fournitures Paris SAS

Type: Prepm. Invoice
Reference Nbr.: 000199
Status: On Hold
Date *: 1/15/2026
Post Period *: 01-2026
Vendor Ref.: [Empty]

Vendor: VEND-FR-01 - Société Fournitures ...
Location *: MAIN - Primary Location
Currency: USD
Terms *: 30D - 30 Days
Due Date *: 2/14/2026
Cash Discount Date *: 2/14/2026
Project: X - Non-Project Code.
Description: [Empty]

Detail Total: 150.00
Line Discounts: 0.00
Document Discounts: 0.00
Retained Amount: 0.00
Tax Total: 30.00
Unpaid Balance: 180.00
Cash Discount: 0.00

DETAILS | FINANCIAL | TAXES | APPROVALS | APPLICATIONS | COMPLIANCE

Inventory ID	Transaction Descr.	Quantity	UOM	Unit Cost	Ext. Cost	Discount Amount	Prepayment Percent	Prepayment Amount	Amount	Account
VIDEOGUIDE	Video Training Course	3.00	HOUR	100.0000	300.00	0.00	50.000000	150.00	150.00	50000

Figure: The prepayment invoice's unpaid balance and tax total

Understanding the Prepayment Invoice Lifecycle

The following table shows the main processing steps in the lifecycle of a prepayment invoice, from creation through closure. (Some steps apply conditionally.) Each step is initiated by a user action on the *Bills and Adjustments* (AP301000) form and results in a corresponding document status.

Step	User Action	Status	Notes
1	Create and save a prepayment invoice	<i>On Hold</i>	<p>The Remove Hold button is shown on the form toolbar of the <i>Bills and Adjustments</i> form.</p> <p>This status is assigned if the Hold Documents on Entry check box is selected on the <i>Accounts Payable Preferences</i> (AP101000) form.</p> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;"> <p> If the approval workflow has been set up for prepayment invoices, they're always created with the <i>On Hold</i> status.</p> </div>
		<i>Balanced</i>	<p>The prepayment invoice can be released.</p> <p>This status is assigned instead of <i>On Hold</i> if the Hold Documents on Entry check box is cleared on the <i>Accounts Payable Preferences</i> form.</p>
<p>The actions of this step are performed if the approval workflow has been set up for prepayment invoices.</p>			

Step	User Action	Status	Notes
2	Remove the prepayment invoice from hold	<i>Pending Approval</i>	The Approve and Reject buttons become available on the form toolbar of the <i>Bills and Adjustments</i> form.
	Reject the prepayment invoice	<i>Rejected</i>	The prepayment invoice can't be released until it's corrected and resubmitted.
	Approve the prepayment invoice	<i>Balanced</i>	The approved prepayment invoice can be released; the Release button appears on the form toolbar.
The following step is performed if the approval workflow has not been set up for prepayment invoices .			
2	Remove the prepayment invoice from hold	<i>Balanced</i>	The prepayment invoice can be released. This step applies if the Hold Documents on Entry check box is selected on the <i>Accounts Payable Preferences</i> form.
3	Release the prepayment invoice	<i>Pending Payment</i>	The system creates a GL batch to credit the Accounts Payable account and debit the prepayment (deposit) account in the amount of the prepayment invoice. The prepayment invoice can now be paid; the Pay button appears on the form toolbar. For details, see the <i>Paying the Prepayment Invoice</i> section of this topic.
4 (Optional)	Void an unpaid prepayment invoice	<i>Voided</i>	The system creates a debit adjustment with a single line summarizing the prepayment invoice's details. After you release the debit adjustment, the system reverses the GL entries posted when the prepayment invoice was released: Now the Accounts Payable account is debited, and the prepayment account is credited.
5	Pay the prepayment invoice		
	Pay the prepayment invoice partially	<i>Pending Payment</i>	You can do one of the following: <ul style="list-style-type: none"> Pay the remaining unpaid balance of the prepayment invoice Write off the unpaid balance of the prepayment invoice by clicking the Write Off Unpaid Balance command on the More menu Once either of these actions has been performed, the <i>Unapplied</i> status is assigned to the prepayment invoice.

Step	User Action	Status	Notes
	Pay the prepayment invoice in full	<i>Unapplied</i>	The prepayment invoice is paid and its balance can be applied to AP bills or credit adjustments. The Apply button appears on the form toolbar of the <i>Bills and Adjustments</i> form. For details, see the <i>Applying the Prepayment Invoice to an AP Bill or a Credit Adjustment</i> section of this topic.
6	Apply the prepayment invoice to AP bill or a credit adjustment		
	Apply a part of the prepayment invoice's balance to any number of AP bills or credit adjustments of the vendor; release the application	<i>Unapplied</i>	You can apply the remaining balance to any AP document of the vendor.
	Apply the full balance of the prepayment invoice to any number of the vendor's AP bills or credit adjustments; release the application	<i>Closed</i>	The prepayment invoice's balance is 0, and no further processing of this document is allowed.

Viewing the Vendor's Balance

On the *Vendor Details* (AP402000) form, when the *VAT Recognition on AP Prepayments* feature is enabled, two additional columns appear in the table: **AP Account** and **AP Subaccount** (if subaccounts are enabled in your system). These columns show the specific accounts the system updates when a prepayment invoice is released.

A prepayment invoice appears in the table using two separate lines—one line for each AP account updated when the prepayment invoice is released. The prepayment invoice balance is shown on each line with a different sign, depending on the account to which the prepayment amount is posted (see below):

- The first line shows the amount posted to the prepayment account, representing the advance payment made to the vendor. This amount is displayed with a **minus** sign.
- The second line shows the amount posted to the Accounts Payable account, representing the VAT-related liability. This amount is displayed with a **plus** sign.

Vendor Details

Company/Branch: SWEETEQUIP - Service and E...
 Vendor*: VEND-FR-01 - Société Fournit...
 Period:
 AP Account:
 AP Subaccount:
 Currency:

Balance by Documents (\$) 40.00
 Current Balance (\$) 5,520.00
 Prepayment Balance (\$) -5,480.00
 Balance Discrepancy (\$) 0.00
 Retained Balance (\$) 0.00

Show All Documents
 Include Unreleased Documents

All Records

Type	Reference Nbr.	Date	Post Period	Status	AP Account	AP Subaccount	Currency	Currency Origin. Amount	Currency Balance	Currency Total Amount	Origin. Amount	Balance	Total Amount
Prepmt. Invoice	000198	1/15/2026	01-2026	Pending Payment	13200	0	USD	-600.00	-600.00	-600.00	-600.00	-600.00	-600.00
Prepmt. Invoice	000198	1/15/2026	01-2026	Pending Payment	20000	0	USD	600.00	600.00	600.00	600.00	600.00	600.00
Prepmt. Invoice	000171	1/6/2026	01-2026	Pending Payment	20000	0	USD	240.00	240.00	240.00	240.00	240.00	240.00
Prepmt. Invoice	000171	1/6/2026	01-2026	Pending Payment	13200	0	USD	-240.00	-240.00	-240.00	-240.00	-240.00	-240.00
Prepmt. Invoice	000189	1/7/2026	01-2026	Unapplied	13200	0	USD	-1,200.00	-700.00	-1,200.00	-1,200.00	-700.00	-1,200.00
Prepmt. Invoice	000189	1/7/2026	01-2026	Unapplied	20000	0	USD	1,200.00	0.00	1,200.00	1,200.00	0.00	1,200.00
Prepmt. Invoice	000193	1/7/2026	01-2026	Unapplied	13200	0	USD	-240.00	-240.00	-240.00	-240.00	-240.00	-240.00
Prepmt. Invoice	000193	1/7/2026	01-2026	Unapplied	20000	0	USD	240.00	0.00	240.00	240.00	0.00	240.00

Figure: Prepayment invoices shown on the Vendor Details form

The amount shown in the **Original Amount** column follows the same sign logic.

The **Current Balance** amount in the Summary area isn't affected by the prepayment invoice. Instead, the balances from both lines of the prepayment invoice are aggregated and reflected in the **Prepayment Balance** box. This ensures that prepayments are tracked separately while the vendor's current liability remains unchanged.

Paying the Prepayment Invoice

Once the prepayment invoice has been released, you can pay it. On the [Bills and Adjustments](#) (AP301000) form, you click **Pay** on the form toolbar. The system opens the [Checks and Payments](#) (AP302000) form with the prepayment invoice added on the **Documents to Apply** tab. You can now pay the prepayment invoice fully or partially.

To Pay the Prepayment Invoice in Full

First, ensure that the system has inserted the prepayment invoice's unpaid balance in the **Payment Amount** box of the Summary area of the [Checks and Payments](#) form and in the **Amount Paid** column of the **Documents to Apply** tab.

Then release the payment. Depending on the vendor's payment method, you may have to print the corresponding check first.

When the payment application is released, the system generates a GL batch to credit the company's cash account and debit the Accounts Payable account. The batch also includes VAT transactions debiting the Tax Claimable account and crediting the Tax on AP Prepayment account. You can find the GL batch link on the **Financial** tab of the [Checks and Payments](#) form.

The *Payment* document is assigned the *Closed* status. On the **Application History** tab, the system adds a line with the reference numbers of the prepayment invoice and the generated GL batch. The prepayment invoice is assigned the *Unapplied* status, which means that its balance can be applied to the vendor's AP bills or credit adjustments.

On the [Bills and Adjustments](#) form, the balance of the prepayment invoice is now displayed in the **Balance** box (which replaces the **Unpaid Balance** box once the prepayment invoice is paid) in the Summary area. The system also updates the vendor's prepayment balance on the [Vendors](#) (AP303000) form.

To Pay the Prepayment Invoice Partially

To apply a partial payment to the prepayment invoice, on the [Checks and Payments](#) form, specify this amount in the **Payment Amount** box of the Summary area and in the **Amount Paid** column on the **Documents to Apply** tab. Then release the payment.

The generated GL batch includes VAT transactions calculated proportionally to the paid amount. You can find the link to this batch on the **Financial** tab of the [Checks and Payments](#) form. The payment document is assigned the *Closed* status, and the prepayment invoice maintains the *Pending Payment* status, with the remaining amount shown in the **Unpaid Balance** box on the [Bills and Adjustments](#) form.

You can either pay the unpaid balance of the prepayment invoice or write it off. To write off the unpaid balance of the invoice, you click **Write Off Unpaid Balance** on the More menu of the [Bills and Adjustments](#) form. The system creates a document of the *Debit Adj.* type and opens it on the same form. When the debit adjustment is released, the system generates a GL transaction that credits the vendor's prepayment (deposit) account and debits the Accounts Payable account.

Applying the Prepayment Invoice to an AP Bill or a Credit Adjustment

When the prepayment invoice has been fully paid, it's assigned the *Unapplied* status (see below) and can be applied to an AP bill or credit adjustment. You can apply a prepayment invoice to a single AP bill or credit adjustment in full or distribute its available balance across any number of the vendor's AP documents.

On the [Bills and Adjustments](#) (AP301000) form, click **Apply** on the form toolbar (also shown below).

The screenshot shows the 'Bills and Adjustments' form for 'Prepmt. Invoice 000174 - Société Fournitures Paris SAS'. The status is 'Unapplied'. The 'Apply' button is highlighted in the toolbar. The form displays various fields for vendor, location, currency, terms, and dates. A summary table on the right shows a total of 300.00. Below the form is a table with columns for Inventory ID, Transaction Descr., Quantity, UOM, Unit Cost, Ext. Cost, Discount Amount, Prepayment Percent, Prepayment Amount, and Amount.

Inventory ID	Transaction Descr.	Quantity	UOM	Unit Cost	Ext. Cost	Discount Amount	Prepayment Percent	Prepayment Amount	Amount
VIDEOGUIDE	Video Training Course	3.00	HOUR	100.0000	300.00	0.00	100.000000	300.00	300.00

Figure: The *Apply* button on the *Bills and Adjustments* form

The system opens the [Checks and Payments](#) (AP302000) form with the prepayment invoice selected in the Summary area. On the **Documents to Apply** tab, add one or more rows and select the vendor's AP bills or credit adjustments to which you want to apply the prepayment amount (see below). In the **Amount Paid** column, specify the amount to be paid for each selected AP document. Then on the form toolbar, click **Release**.

Checks and Payments
Prepmt. Invoice 000174 - Société Fournitures Paris SAS

Note Activities Files

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Type	Prepmt. Invoice	Vendor	VEND-FR-01 - Société Fournitures ...	Payment Amount	360.00
Reference Nbr.	000174	Location	MAIN - Primary Location	Applied to Order	0.00
Status	Unapplied	Joint Payee Name		Unapplied Balance	20.00
Application Date *	1/6/2026	Payment Method	CHECK	Application Amount	340.00
Application Period *	01-2026	Cash Account		Finance Charges	0.00
Payment Ref.		Currency	USD 1 View Base		
		Description			

DOCUMENTS TO APPLY ORDERS APPLICATION HISTORY FINANCIAL APPROVALS REMITTANCE CHARGES COMPLIANCE

⌂ + × Load Documents Add Joint Payee Search

Branch	Document Type	*Reference Nbr.	Line Nbr.	Currency	Amount Paid	Cash Discount Taken	With. Tax	Amount Paid (USD)
SWEETEQUIP	Bill	000177	0	USD	100.00	0.00	0.00	100.00
SWEETEQUIP	Credit Adj.	000178		USD	240.00	0.00	0.00	240.00

Figure: Applying a prepayment invoice to two of the vendor’s AP documents

When you release the application, the system generates a GL batch that debits the Accounts Payable account and credits the prepayment (deposit) account. The batch also includes tax transactions debiting the Tax on AP Prepayment account and crediting the Tax Claimable account (see below). These entries reverse the tax entries created when the prepayment invoice was paid. The system also updates the vendor’s balance and prepayment balance on the *Vendors* (AP303000) form.

Journal Transactions
AP AP000197 - Actual Ledger

Note Activities Files

⌂ ↻ ⏪ ⏩ + 🗑️ 📄 < > >> ...

Module	AP	Branch	SWEETEQUIP - Service and Equipme...	Debit Total	396.67
Batch Number	AP000197	Ledger	ACTUAL - Actual Ledger	Credit Total	396.67
Status	Posted	Currency	USD 1 View Base	Type	Normal
Transaction Date	1/6/2026	Description			
Post Period	01-2026				

DETAILS APPROVALS

⌂ View Source Document Reclassification History Search

*Account	Description	Ref. Number	Transaction Date	Quantity UOM	Debit Amount	Credit Amount	Transaction Description
13200	Deposit to Vendor	000174	1/6/2026	0.00	0.00	340.00	
20000	Accounts Payable	000174	1/6/2026	0.00	340.00	0.00	
17000	Tax Claimable	000174	1/6/2026	0.00	0.00	40.00	VAT
24010	Tax on AP Prepayment	000174	1/6/2026	0.00	40.00	0.00	VAT
17000	Tax Claimable	000174	1/6/2026	0.00	0.00	16.67	VAT
24010	Tax on AP Prepayment	000174	1/6/2026	0.00	16.67	0.00	VAT

Figure: The GL batch generated on release of an application of a prepayment invoice to AP documents

Depending on whether an AP document (AP bill or credit adjustment) is fully or partially paid, you’ll see the following impact on the statuses and balances of the document and prepayment invoice:

- If the AP document is partially paid, its status remains *Open*, and its balance is reduced.
- If the AP document is fully paid, its status changes to *Closed*, and its balance becomes 0.
- If the full available balance of the prepayment invoice is applied, the prepayment invoice's status changes to *Closed*.
- If only part of the prepayment invoice balance is applied, the prepayment invoice's status remains *Unapplied*, and the remaining available balance is reduced accordingly.

Checks and Payments
Prepmt. Invoice 000174 - Société Fournitures Paris SAS

The operation has completed.

Type: Prepmt. Invoice
Reference Nbr.: 000174
Status: Unapplied
Application Date*: 1/6/2026
Application Period*: 01-2026
Payment Ref.:

Vendor: VEND-FR-01 - Société Fournitures Paris SAS
Location: MAIN - Primary Location
Joint Payee Name:
Payment Method: CHECK
Cash Account:
Currency: USD 1 View Base
Description:

Payment Amount: 360.00
Applied to Order: 0.00
Unapplied Balance: 20.00
Application Amount: 0.00
Finance Charges: 0.00

DOCUMENTS TO APPLY ORDERS **APPLICATION HISTORY** FINANCIAL APPROVALS REMITTANCE CHARGES COMPLIANCE

Reverse Application

Branch	Batch Number	Doc. Type	Reference Nbr.	Line Nbr.	Currency	Amount Paid	Cash Discount Taken	With. Tax	Amount Paid (USD)	Cross Rate
SWEETEQUIP	AP000190	Payment	000031	0	USD	360.00	0.00	0.00	360.00	1.00000000
SWEETEQUIP	AP000197	Credit Adj.	000178	0	USD	240.00	0.00	0.00	240.00	1.00000000
SWEETEQUIP	AP000197	Bill	000177	0	USD	100.00	0.00	0.00	100.00	1.00000000

Figure: The unapplied balance in the prepayment invoice after payment of some AP documents

On the **Application History** tab, the system has added lines with the applied AP documents and the reference number of each document's generated GL batch.

Key Takeaways

- Users can create **AP prepayment invoices with calculated VAT**, supporting countries where VAT must be recognized at prepayment time.
- Prepayment invoices are created as a **separate document type (Prepmt. Invoice)** with their own numbering, approvals, and processing flow.
- VAT is recognized **when a prepayment is paid**: The system credits the dedicated Tax on AP Prepayment account and debits the Tax Claimable account, ensuring that the tax amount is included in correct the tax report.
- Prepayment invoices support **full or partial payment and application**, with the correct tax and GL impact at each step.

Finance: AP Balance Reports Now Include AP Prepayment Invoices

When you work with AP prepayment invoices, your accounts payable balances can change quickly as these invoices are released, paid, and applied to bills. In Acumatica ERP 2026 R1, AP balance reports now include prepayment invoices, helping you keep the reported vendor balances aligned throughout this process.



The functionality is available only if the *VAT Recognition on AP Prepayments* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn how prepayment invoices appear in the balance reports, what signs to expect, and how write-offs affect the reported balances.

What's New at a Glance with Prepayment Invoices

- Released prepayment invoices are included in AP balance reports until they're closed.
- In reports, a prepayment invoice may appear under both the AP account and the prepayment account, with signs that reflect its role in each account.
- Debit adjustment write-offs are shown with opposite signs under the AP account and the prepayment account, helping the report totals align with GL balances.

The sections below describe these changes in more detail.

How Prepayment Invoices Are Reflected in Reports

The AP balance reports now reflect released prepayment invoices throughout their lifecycle until they're closed. As a result, the vendor totals in the reports match the related GL totals.

The Affected AP Balance Reports

The following reports have been updated to include prepayment invoices:

- [AP Balance by GL Account](#) (AP632000)
- [AP Balance by Vendor](#) (AP632500)
- [AP Balance by Vendor MC](#) (AP633000)

How Prepayment Invoices Appear in the Reports

In the AP balance reports, a prepayment invoice is shown twice—once under the AP account and once under the prepayment account used in this invoice. This approach ensures that the vendor balances shown in the reports match the GL.

The document type (**Doc. Type** column) of a prepayment invoice is *Prepmt. Invoice*.

How to Interpret Amounts and Signs

The reports apply consistent sign logic so you can interpret balances correctly. In the rows of prepayment invoices, the values in the **Amount** and **Balance** columns are shown as follows:

- **Under the AP account:** The prepayment invoice amount posted to the AP account is shown as a positive value. When this invoice is released, the amount is posted to the AP account and appears in the **Amount**

column. Therefore, even if no payments have been applied yet, the prepayment invoice still appears in the table for the AP account.

The **Balance** of this line changes as payments or prepayments are applied to the prepayment invoice.

- **Under the prepayment account:** The prepayment invoice amount posted to the prepayment account is shown as a negative value because it represents a vendor deposit.

The **Balance** represents the remaining unused part of the prepayment in that account. When the prepayment is fully applied, the balance in the table for the prepayment account becomes *0.00*.

Because the same prepayment invoice appears under both accounts, you'll typically see a **positive** amount on the AP account line and a **negative** amount on the prepayment account line.

Example: The Same Prepayment Invoice Under Both Accounts

The screenshot below shows the same prepayment invoice (*000173*) under two accounts in the [AP Balance by Vendor](#) (AP632500) report, with opposite signs that reflect the invoice's role in the corresponding account.

You can see the following tables in the report:

- **Prepayment account table** (Item 1 below): This table shows document data for the *13200 (Deposit to Vendor)* account, with negative values shown for prepayment invoices. For example, prepayment invoice *000173* is listed with a negative amount (*-360.00*). This amount represents the vendor deposit recorded in the prepayment account.

Because the same value is shown in the **Amount** and **Balance** columns, the prepayment has not been used yet—that is, the prepayment invoice hasn't been applied to any AP bill.

- **AP account table** (Item 2): This table shows data for the *20000 (Accounts Payable)* account, with positive values shown for the same prepayment invoices. For example, prepayment invoice *000173* appears again with a positive amount (*360.00*). The **Balance** for this line is *0.00*, which indicates that the prepayment invoice has been fully settled. The applied payment is shown in the line directly under the prepayment invoice line (see below).

AP Balance by Vendor (Open Documents)			Financial Period: 03-2026		Page: 1 of 3					
Company/Branch: SWEETEQUIP			Vendor: VEND-FR-01		Date: 3/4/2026 6:28 PM					
			Include Applications		User: Maia Davis					
Vendor		Vendor Name								
VEND-FR-01		Société Fournitures Paris SAS								
Account	Subaccount	Description								
13200	0	Deposit to Vendor 1								
Ref. Number	Applied To	Doc. Type	Vendor Ref.	Doc. Date	Posted	Applied	Closed	Description	Amount	Balance
000171		Prepmt. Invoice		1/6/2026	01-2026				-240.00	-240.00
000173		Prepmt. Invoice		1/6/2026	01-2026				-360.00	-360.00
000174		Prepmt. Invoice		1/6/2026	01-2026				-360.00	-20.00
	000178	Credit Adj.		1/6/2026		01-2026			240.00	
	000177	Bill		1/6/2026		01-2026			100.00	
000175		Prepmt. Invoice		1/6/2026	01-2026				-360.00	-160.00
	000176	Debit Adj.		1/6/2026		01-2026			200.00	
000189		Prepmt. Invoice		1/7/2026	01-2026				-1,200.00	-700.00
	000177	Bill		1/7/2026		01-2026			500.00	
000193		Prepmt. Invoice		1/7/2026	01-2026				-240.00	-240.00
000194		Prepmt. Invoice		1/7/2026	01-2026				-5,400.00	-4,000.00
	000195	Debit Adj.		1/7/2026		01-2026			1,400.00	
000198		Prepmt. Invoice		1/15/2026	01-2026				-600.00	-600.00
000204		Prepmt. Invoice		1/16/2026	01-2026				-180.00	-180.00
000206		Prepmt. Invoice		1/20/2026	01-2026				-240.00	-240.00
000208		Prepmt. Invoice		1/20/2026	01-2026				-120.00	-120.00
000212		Prepmt. Invoice		1/21/2026	01-2026				-120.00	-120.00
000214		Prepmt. Invoice		1/21/2026	01-2026				-240.00	-240.00
000224		Prepmt. Invoice		1/21/2026	01-2026				-120.00	-120.00
000225		Prepmt. Invoice		1/21/2026	01-2026				-120.00	-120.00
000226		Prepmt. Invoice		1/26/2026	01-2026				-120.00	-120.00
Account Documents Total:									-7,580.00	
Account Unrealized Gain/Loss:									0.00	
Account	Subaccount	Description								
20000	0	Accounts Payable 2								
Ref. Number	Applied To	Doc. Type	Vendor Ref.	Doc. Date	Posted	Applied	Closed	Description	Amount	Balance
000179		Debit Adj.		1/6/2026	01-2026				-240.00	-240.00
000171		Prepmt. Invoice		1/6/2026	01-2026				240.00	240.00
000173		Prepmt. Invoice		1/6/2026	01-2026				360.00	0.00
	000030	Payment		1/6/2026		01-2026			-360.00	
000174		Prepmt. Invoice		1/6/2026	01-2026				360.00	0.00

Figure: Prepayment invoices in the AP Balance account

Write-Offs of Unpaid Prepayment Invoice Balances

If an unpaid prepayment invoice balance is written off by a debit adjustment, the reports display the debit adjustment row with different signs depending on the account:

- **AP account line:** Shown as a negative value (with the **minus** sign)
- **Prepayment account line:** Shown as a positive value

Learn More

You might find the topics of the following chapter helpful: [Processing Prepayment Invoices](#).

Finance: Prepayment Invoices from Purchase Orders

Businesses often need to pay vendors a deposit before goods or services are delivered, and these prepayments are frequently tied to specific purchase orders. If taxes must be recognized and reported at the time of prepayment in your country, you can create prepayment invoices from purchase orders starting in Acumatica ERP 2026 R1. When a prepayment invoice is paid, the taxes are recognized and included in the tax report of the appropriate tax reporting period.



With prepayment invoices, taxes are recognized when the prepayment is paid. This differs from prepayment requests, which may include calculated taxes but do not recognize these taxes or include them in tax reports.



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

Creating a Prepayment Invoice from a Purchase Order: The Benefits

- Purchase order details are copied to the prepayment invoice, so you don't need to re-enter data.
- The prepayment invoice is automatically linked to the purchase order.
- Released prepayment invoices are immediately reflected in purchase order totals.
- When an AP bill is created for the purchase order, paid prepayment invoices are automatically applied to the bill.
- Multiple prepayment invoices can be created for a single purchase order, supporting milestone-based advance payments.
- Creating prepayment invoices directly from purchase orders reduces the risk of incorrect document application.

How to Create a Prepayment Invoice from a Purchase Order



When the *VAT Recognition on AP Prepayments* feature is enabled, the **Create Prepayment Invoice** command replaces **Create Prepayment Request**. New prepayment requests can't be created; however, you can still process any existing prepayment requests.

You create a prepayment invoice on the *Purchase Orders* (PO301000) form.

On the More menu, you click **Create Prepayment Invoice**. In the **Create Prepayment Invoice** dialog that opens, you specify the prepayment percent or the prepayment amount (see below).

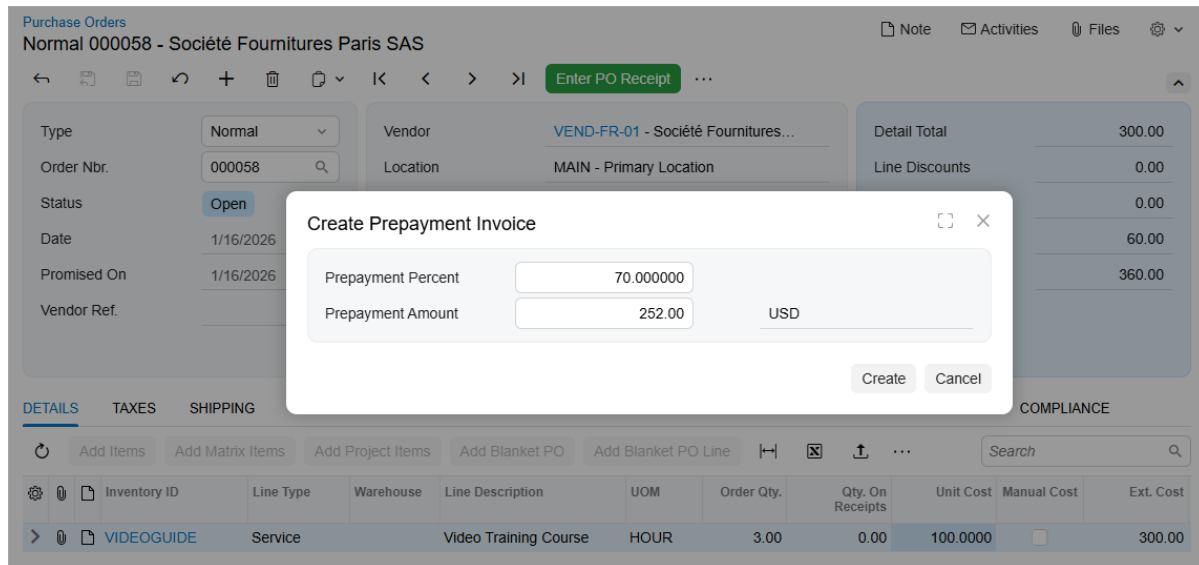


Figure: The *Create Prepayment Invoice* dialog box

The default prepayment percent is determined as follows:

- For the **first prepayment invoice**:
 - a. If a prepayment percent is specified on the **Vendor Info** tab of the *Purchase Orders* form, that value is used.
 - b. Otherwise, the system uses the prepayment percent specified in the vendor settings on the *Vendors* (AP303000) form.
 - c. If no prepayment percent is specified in either place, the prepayment percent is set to 100.
- For a **subsequent prepayment invoice**:
The prepayment percent is calculated based on the remaining balances of the purchase order as follows.

$$\text{Prepayment Percent} = (\text{Remaining Unpaid Amount} \div \text{Remaining Unbilled Amount}) \times 100$$

You can modify the percent, if needed. Once the prepayment percent is specified, click **Create**.

What the Created Prepayment Invoice Looks Like

When you click **Create** in the **Create Prepayment Invoice** dialog box, the *Bills and Adjustments* (AP301000) form opens with a new document of the *Prepmt. Invoice* type. Its summary information—such as the vendor, document currency, location, and tax zone—is copied from the purchase order. The document date is set to the current business date.

The **Details** tab contains only detail lines that haven't yet been fully billed. The values of the following columns are copied from the purchase order: **Inventory ID**, **Trans. Description**, **Discount Percent**, **Discount Code**, **UOM**, **Account**, **Subaccount**, **Project Task**, **Cost Code**, and **Tax Category**.

On the **Taxes** tab, the taxes are transferred as well. If current tax rates differ from the rates calculated for the purchase order on its document date, taxes are recalculated.



Group and document discounts from the purchase order are not automatically applied to a prepayment invoice created from the purchase order. You can apply these discounts manually, if needed.

Processing Purchase Orders with Prepayment Invoices

When the prepayment invoice is released, it appears with the *Pending Payment* status on the **Prepayments** of the [Purchase Orders](#) (PO301000) form.

Prepayment for the Full Purchase Order Total Amount

If a prepayment invoice is created for the total purchase order amount and released, the **Unpaid Amount** on the **Other** tab of the purchase order is set to 0 (see below).

The screenshot shows the 'Purchase Orders' form for 'Normal 000066 - Société Fouritures Paris SAS'. The 'OTHER' tab is selected, displaying the following data:

DETAILS		TAXES		SHIPPING		VENDOR INFO		APPROVALS		PO HISTORY		PREPAYMENTS		CHANGE ORDERS		OTHER		COMPLIANCE	
Type	Normal	Vendor	VEND-FR-01 - Société Fouritures Paris SAS			Detail Total	200.00												
Order Nbr.	000066	Location	MAIN - Primary Location			Line Discounts	0.00												
Status	Open	Owner	Maia Davis			Document Discounts	0.00												
Date	1/21/2026	Project	X - Non-Project Code.			Tax Total	40.00												
Promised On	1/21/2026	Currency	USD 1 View Base			Order Total	240.00												
Vendor Ref.		Description																	
Order Info		Print and Email Options				Order Totals				Billing Info									
Branch	SWEETEQUIP - Service and Eq...	<input checked="" type="checkbox"/> Do Not Print	<input type="checkbox"/> Printed	Goods		0.00		Unbilled Quantity		2.00		Unbilled Amount		240.00					
Requisition Ref. Nbr.		<input checked="" type="checkbox"/> Do Not Email	<input type="checkbox"/> Emailed	Services		200.00		Unbilled Prepayme...		240.00		Unpaid Amount		0.00					
Originating PO Nbr.				Line Discounts		0.00													
Workgroup ID				Document Discounts		0.00													
<input type="checkbox"/> Allow AP Bill Before Receipt																			
Retainage Settings																			
<input type="checkbox"/> Apply Retainage																			
Retainage Percent	0.000000																		

Figure: An unpaid balance of 0 in the purchase order

When the AP bill for the purchase order is created and released, the linked released prepayment invoice is automatically associated with the AP bill and added to the **Applications** tab of the [Bills and Adjustments](#) (AP301000) form. The purchase order is assigned the *Closed* status, and its unbilled balance is set to 0 (see below).

Purchase Orders
Normal 000066 - Société Fournitures Paris SAS

Vendor: VEND-FR-01 - Société Fournitures Paris SAS
Location: MAIN - Primary Location
Owner: Maia Davis
Project: X - Non-Project Code.
Currency: USD 1 View Base

Type: Normal
Order Nbr.: 000066
Status: Closed
Date: 1/21/2026
Promised On: 1/21/2026

Detail Total: 200.00
Line Discounts: 0.00
Document Discounts: 0.00
Tax Total: 40.00
Order Total: 240.00

DETAILS TAXES SHIPPING VENDOR INFO APPROVALS PO HISTORY PREPAYMENTS CHANGE ORDERS OTHER COMPLIANCE

Order Info
Branch: SWEETEQUIP - Service and Eq...
Requisition Ref. Nbr.:
Originating PO Nbr.:
Workgroup ID:
 Allow AP Bill Before Receipt

Print and Email Options
 Do Not Print Printed
 Do Not Email Emailed

Order Totals
Goods: 0.00
Services: 200.00
Line Discounts: 0.00
Document Discounts: 0.00

Retainage Settings
 Apply Retainage
Retainage Percent: 0.000000

Billing Info
Unbilled Quantity: 0.00
Unbilled Amount: 0.00
Unbilled Prepayme...: 240.00
Unpaid Amount: 0.00

Figure: The purchase order's unbilled balance of 0

If the prepayment invoice is paid after the AP bill has been created, you apply it to the linked AP bill. To do this, while viewing the prepayment invoice on the **Bills and Adjustments** form, select the bill on the **Applications** tab (see below).

Bills and Adjustments
Prepmt. Invoice 000216 - Société Fournitures Paris SAS

Vendor: VEND-FR-01 - Société Fournitures Paris SAS
Location: MAIN - Primary Location
Currency: USD 1 View Base
Terms: 30D - 30 Days
Due Date *: 2/20/2026
Cash Discount Date *: 2/20/2026
Project: X - Non-Project Code.

Type: Prepmt. Invoice
Reference Nbr.: 000216
Status: Unapplied
Date: 1/21/2026
Post Period: 01-2026

Detail Total: 200.00
Line Discounts: 0.00
Document Discounts: 0.00
Retained Amount: 0.00
Tax Total: 40.00
Amount: 240.00
Balance: 240.00
Cash Discount: 0.00

DETAILS FINANCIAL TAXES APPROVALS APPLICATIONS COMPLIANCE

Auto-Apply

Branch	Doc. Type	Reference Nbr.	Amount Paid	Cash Discount Taken	Date	Balance	Description	Post Period	Payment Ref.	Status
SWEETEQUIP	Payment	000044	240.00	0.00	1/21/2026	0.00		01-2026	0017	Closed
SWEETEQUIP	Bill	000217	240.00	0.00	1/21/2026	240.00		01-2026		Open

Figure: AP bill linked to the prepayment invoice

You can also open the prepayment invoice on the [Checks and Payments](#) (AP302000) form. On the **Documents to Apply** tab, the associated AP bill is listed. To apply the prepayment invoice to the AP bill, click **Release** on the form toolbar.

After the application is released, both the prepayment invoice and the bill are closed.



If the prepayment invoice is **paid before the AP bill is created**, it is automatically applied to the AP bill when the bill is released, and the application is released at the same time. As a result, the purchase order, the prepayment invoice, and the AP bill are closed.

This behavior applies **only when** the prepayment invoice and the AP bill are created for the full purchase order amount.

Prepayment for a Partial Purchase Order Amount

If a prepayment invoice is created for a partial purchase order amount and released, the **Unpaid Amount** on the **Other** tab of the purchase order is reduced by the prepayment amount (see below). Below you can see a purchase order with a 50% prepayment applied.

The screenshot shows the 'Purchase Orders' form for 'Normal 000065 - Société Fournitures Paris SAS'. The 'OTHER' tab is active, displaying the following information:

Purchase Orders	
Type	Normal
Order Nbr.	000065
Status	Open
Date	1/21/2026
Promised On	1/21/2026
Vendor Ref.	
Vendor	VEND-FR-01 - Société Fournitures P...
Location	MAIN - Primary Location
Owner	Maia Davis
Project	X - Non-Project Code.
Currency	USD 1 View Base
Description	
Detail Total	200.00
Line Discounts	0.00
Document Discounts	0.00
Tax Total	40.00
Order Total	240.00

The 'OTHER' tab contains the following sections:

- Order Info:** Branch (SWEETEQUIP - Service ...), Requisition Ref. Nbr., Originating PO Nbr., Workgroup ID, and an option to 'Allow AP Bill Before Receipt'.
- Print and Email Options:** Checkboxes for 'Do Not Print', 'Printed', 'Do Not Email', and 'Emailed'.
- Retainage Settings:** An option to 'Apply Retainage' and a 'Retainage Percent' field set to 0.000000.
- Order Totals:** Goods (0.00), Services (200.00), Line Discounts (0.00), and Document Discounts (0.00).
- Billing Info:** Unbilled Quantity (2.00), Unbilled Amount (240.00), Unbilled Prepayme... (120.00), and **Unpaid Amount (120.00)** (highlighted with a red box).

Figure: The decreased unpaid balance of a purchase order

When a subsequent prepayment invoice is created for the remaining purchase order amount and released, the **Unpaid Amount** is set to 0. The **Unbilled Prepayment Total** is set to the full purchase order amount until an AP bill is created.

When the AP bill is created for the full purchase order amount and released, all linked released prepayment invoices are automatically associated with the AP bill and appear on the **Applications** tab of the [Bills and Adjustments](#) form. The purchase order is assigned the *Closed* status, and its unbilled balance is set to 0.

Once the prepayment invoice is paid, you can apply it to the AP bill. Because the prepayment invoice covers only part of the purchase order amount, the **Amount Paid** column shows the prepayment amount. The **Balance** column shows the total balance of the AP bill.

Bills and Adjustments
Prepmt. Invoice 000220 - Société Fournitures Paris SAS

Type: Prepmt. Invoice
Reference Nbr.: 000220
Status: Unapplied
Date: 1/21/2026
Post Period: 01-2026
Vendor Ref.:

Vendor: VEND-FR-01 - Société Fournitures Paris SAS
Location: MAIN - Primary Location
Currency: USD
Terms: 30D - 30 Days
Due Date *: 2/20/2026
Cash Discount Date *: 2/20/2026
Project: X - Non-Project Code.
Description:

Detail Total: 100.00
Line Discounts: 0.00
Document Discounts: 0.00
Retained Amount: 0.00
Tax Total: 20.00
Amount: 120.00
Balance: 120.00
Cash Discount: 0.00

DETAILS FINANCIAL TAXES APPROVALS **APPLICATIONS** COMPLIANCE

Auto-Apply

Branch	Doc. Type	Reference Nbr.	Amount Paid	Cash Discount Taken	Date	Balance	Description	Post Period	Payment Ref.	Status
SWEETEQUIP	Payment	000046	120.00	0.00	1/21/2026	0.00		01-2026	0019	Closed
SWEETEQUIP	Bill	000221	120.00	0.00	1/21/2026	240.00		01-2026		Open

Figure: The AP bill linked to the prepayment invoice

When the application is released, the prepayment invoice is closed. The purchase order is also closed because the AP bill has already been created. The AP bill remains open until the remaining balance is paid



If the prepayment invoice was paid before the AP bill was created, then when the AP bill is created and released, the prepayment invoice is automatically applied to it, and this application is released. As a result, the balance of the AP bill is reduced by the prepayment amount. The prepayment invoice is closed, and the AP bill remains open.

You can create any number of prepayment invoices for a purchase order until an AP bill is created for the purchase order.

AP Prepayment Invoices in Aging Reports

Several accounts payable aging reports have been updated to properly reflect prepayment invoices. In these reports:

- Only the unpaid portion of a prepayment invoice posted to the Accounts Payable account is included.
- Prepayment invoice amounts are displayed with a plus sign.
- Applications of payments and reversing adjustments to prepayment invoices reduce the outstanding balance of prepayment invoices.
- Fully paid prepayment invoices are no longer displayed.

The following reports reflect prepayment invoices as described above:

- [AP Aging \(AP631000\)](#)
- [AP Aging by Project \(AP631200\)](#)
- [AP Aged Period-Sensitive \(AP630500\)](#)
- [AP Aged Period-Sensitive by Project \(AP630600\)](#)

- [AP Aging MC \(AP631100\)](#)

Finance: Recover Processing Costs with Automatic Credit Card Surcharges

When customers choose to pay by credit card, you can automatically apply a surcharge to help recover credit card processing costs. A *surcharge* is a small fee added to a credit card transaction to cover your company's costs for processing the payment.

In Acumatica ERP 2026 R1, you can configure and apply a surcharge to each payment created with a credit card or POS terminal. The surcharge is calculated by the processing center and added to the transaction total (including sales tax and applicable fees), then itemized so it's visible in the payment and on receipts.

This surcharge functionality currently supports monthly billing only. This means that your company (the merchant) pays the fees to the processing center once a month. Surcharging in Acumatica ERP works only when the Compliant Surcharge functionality is configured for the merchant location in the processing center.



This functionality is available only if the *Acumatica Payments* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

What You Need to Know

- Fees are regulated by states. Most states cap the surcharge at 3% of the purchase, including sales tax. CT (Connecticut), MA (Massachusetts), Maine (ME), and PR (Puerto Rico) prohibit surcharging. Surcharging isn't supported outside of the US.
- Surcharging is not allowed on ACH payments or debit card payments.
- Each surcharge is shown as a separate line on the bill or receipt, and its amount can't exceed the cost of processing.
- Each surcharge is applied to the total transaction amount that includes the sales tax and any other applicable fees.

Configuration of Surcharge Functionality


A system administrator must ensure that the Compliant Surcharge functionality is set up for the merchant location in the processing center.




After the processing center enables the service, you may need two merchant accounts—one with the surcharge set up and one without. This typically results in setting up two processing centers in Acumatica ERP so that you can choose whether to process a particular transaction with or without a surcharge.

To configure the surcharge functionality:

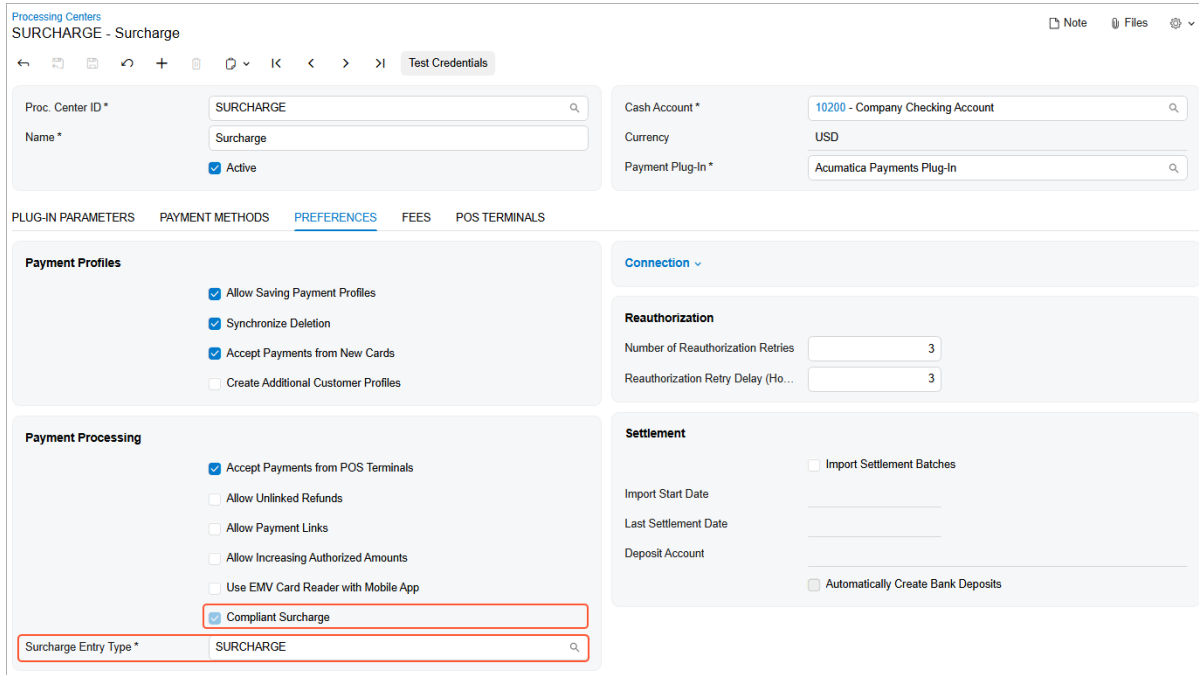
1. On the [Entry Types](#) (CA203000) form, create a new entry type with the following settings:
 - **Disb./Receipt:** *Receipt*
 - **Module:** *CA*
 - **Default Offset Account:** Specified
2. On the [Cash Accounts](#) (CA202000) form, add this entry type to the cash account specified for the payment method.
3. On the [Processing Centers](#) (CA205000) form, create a new processing center.
4. In the **Cash Account** box, select the cash account for the processing center.

 You should add the entry type for surcharges to this cash account as well.

5. On the **Preferences** tab, shown below, select the **Compliant Surcharge** check box.

 This check box appears on the tab when a new processing center is created. It isn't shown for existing processing centers.

6. In the **Surcharge Entry Type** box, select the entry type set up for surcharges.



The screenshot shows the 'Processing Centers - SURCHARGE - Surcharge' form. The 'PREFERENCES' tab is active. Under 'Payment Profiles', the 'Compliant Surcharge' checkbox is checked and highlighted with a red box. At the bottom, the 'Surcharge Entry Type' dropdown is also highlighted with a red box and contains the value 'SURCHARGE'. Other settings include 'Cash Account *' (10200 - Company Checking Account), 'Currency' (USD), and 'Payment Plug-In *' (Acumatica Payments Plug-In).

Figure: Setup of surcharges on the Processing Centers form

Reviewing the Surcharge Before Processing a Payment

On the [Payments and Applications](#) (AR302000) and [Cash Sales](#) (AR304000) forms, the surcharge applied to each payment is shown on the **Charges** tab and in the **Finance Charges** box in the Summary area (see below).

Payments and Applications
Payment 005765 - USA Bartending School

Type: Payment
Reference Nbr.: 005765
Status: Pending Processing
Processing Status: Pending Processing
Application Date: 2/25/2026
Application Period: 02-2026
Payment Ref.:
Deposit After: 2/25/2026

Customer: ABARTENDE - USA Bartending School
Location: MAIN - Primary Location
Payment Method: CCSURCHARG - CC Surcharge
Card/Account Nbr.: Visa **** * 1111
New Card:
Cash Account: 10600 - Credit Card Account
Currency: USD 1 View Base
Description:

Payment Amount: 1,069.20
Applied to Documents: 1,069.20
Applied to Orders: 0.00
Available Balance: 0.00
Write-Off Amount: 0.00
Finance Charges: -32.08
Deducted Charges: 0.00

DOCUMENTS TO APPLY SALES ORDERS APPLICATION HISTORY FINANCIAL APPROVALS CARD PROCESSING **CHARGES**

*Entry Type	Description	*Offset Account	*Offset Subaccount	Amount	*Project	*Project Task
SURCHARGE	Surcharge	49400	000-000	32.08	X	

Figure: A payment with a surcharge applied

Cash Sales
Cash Sale AR015035 - USA Bartending School

Type: Cash Sale
Reference Nbr.: AR015035
Status: Pending Processing
Date: 2/26/2026
Post Period: 02-2026
Payment Ref.: PMT05664
Deposit After: 2/26/2026

Customer: ABARTENDE - USA Bartending School
Location: MAIN - Primary Location
Payment Method: CCSURCHARG - CC Surcharge
Card/Account Nbr.: Visa **** * 1111
Cash Account: 10600 - Credit Card Account
Currency: USD 1 View Base
Project: X - Non-Project Code.
Description:

Detail Total: 100.00
Line Discounts: 0.00
Tax Total: 8.00
Payment Amount: 108.00
Balance: 108.00
Cash Discount Taken: 0.00
Finance Charges: -3.24
Deducted Charges: 0.00

DETAILS FINANCIAL ADDRESSES TAXES APPROVALS COMMISSIONS **CHARGES** CARD PROCESSING

*Entry Type	Description	*Offset Account	*Offset Subaccount	Amount
SURCHARGE	Surcharge	49400	000-000	3.24


Figure: A cash sale with a surcharge applied

Here's what happens when you save a payment or cash sale with a credit card or POS payment method:

- The system retrieves a calculated surcharge and shows it on the form (see above).
- **For saved cards:** A surcharge is calculated once you select the customer payment method.
- **For new cards** entered in a hosted form: The system may show an assumed surcharge initially. After the card is entered, the system updates the surcharge amount. If the card is a debit card, the surcharge becomes 0.
- If you change the payment method or processing center before processing the payment, the system updates the surcharge amount accordingly.

The line added on the **Charges** tab:

- Is added automatically by the system
- Can't be selected manually, edited, or deleted
- Remains non-editable, even for unreleased payments
- Is removed automatically if the payment method is changed to a non-eligible method (for example, *CHECK* or *ACH*)

 To help users understand the posting direction, the **Disb./Receipt** column has been added to the **Charges** tab. The column is hidden by default and can be added by using the Column Configuration dialog box.

Applying Surcharges Across Payment Channels

The surcharge functionality is applied not only in Acumatica ERP but also in customer-facing payment flows:

- Processing actions: Surcharges are applied when you click **Authorize**, **Capture**, **Void**, or **Refund** on the More menu of the [Payments and Applications](#) (AP302000) or [Cash Sales](#) (AR304000) form

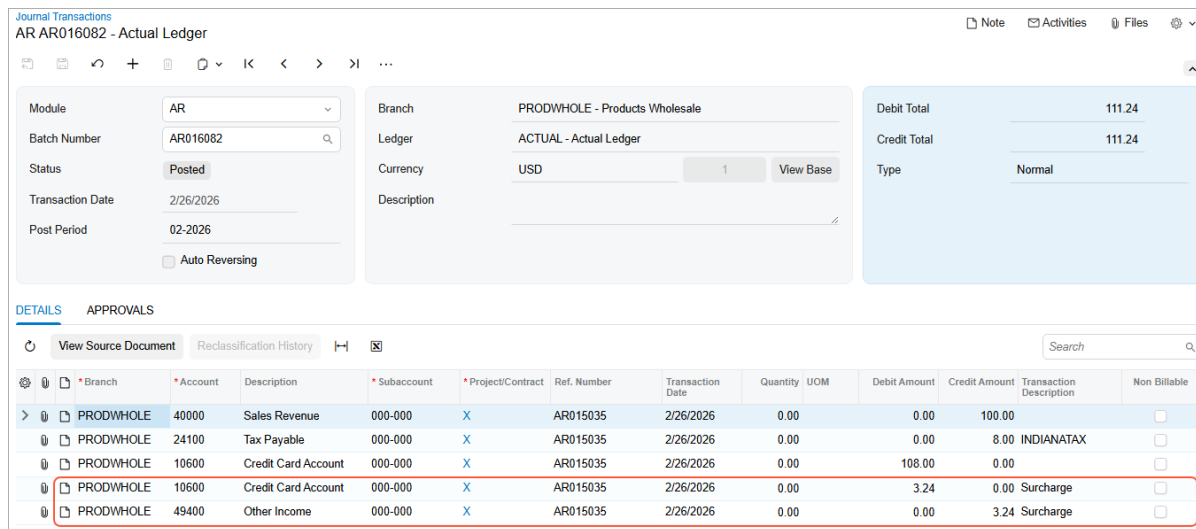
 The amount shown in the **Financial Charges** box is negative for authorized and captured payments and positive for voided payments and refunds.

- Payment links: Surcharges are applied to transactions processed through payment links.
- Acumatica Self-Service Portal: The surcharge amount is shown before the payment is processed and only when a credit card payment method is selected.

Posting Surcharge Amounts to the GL

When you release a payment that includes a surcharge, the system automatically generates a GL entry using the selected surcharge entry type. The surcharge is posted to the **default offset account**, separating the surcharge income from the main sales income.

You can review this amount on the [Journal Transactions](#) (GL301000) form, as shown below.



The screenshot shows the 'Journal Transactions' form for 'AR AR016082 - Actual Ledger'. The 'DETAILS' tab is active, displaying a table of journal entries. A red box highlights the surcharge entries.

Branch	Account	Description	Subaccount	Project/Contract	Ref. Number	Transaction Date	Quantity	UOM	Debit Amount	Credit Amount	Transaction Description	Non Billable
PRODWHOLE	40000	Sales Revenue	000-000	X	AR015035	2/26/2026	0.00		0.00	100.00		<input type="checkbox"/>
PRODWHOLE	24100	Tax Payable	000-000	X	AR015035	2/26/2026	0.00		0.00	8.00	INDIANATA	<input type="checkbox"/>
PRODWHOLE	10600	Credit Card Account	000-000	X	AR015035	2/26/2026	0.00		108.00	0.00		<input type="checkbox"/>
PRODWHOLE	10600	Credit Card Account	000-000	X	AR015035	2/26/2026	0.00		3.24	0.00	Surcharge	<input type="checkbox"/>
PRODWHOLE	49400	Other Income	000-000	X	AR015035	2/26/2026	0.00		0.00	3.24	Surcharge	<input type="checkbox"/>

Figure: The GL transaction generated on release of a document with a surcharge

Surcharges in Settlement Batches and Bank Deposits

In settlement batches on the [Settlement Batches](#) (CA307000) form, each payment is displayed as a single line:

- The payment amount is shown in the **Amount** column.
- The surcharge amount is shown in the **Fixed Fee** column.

Below is a settlement batch with a surcharge applied.

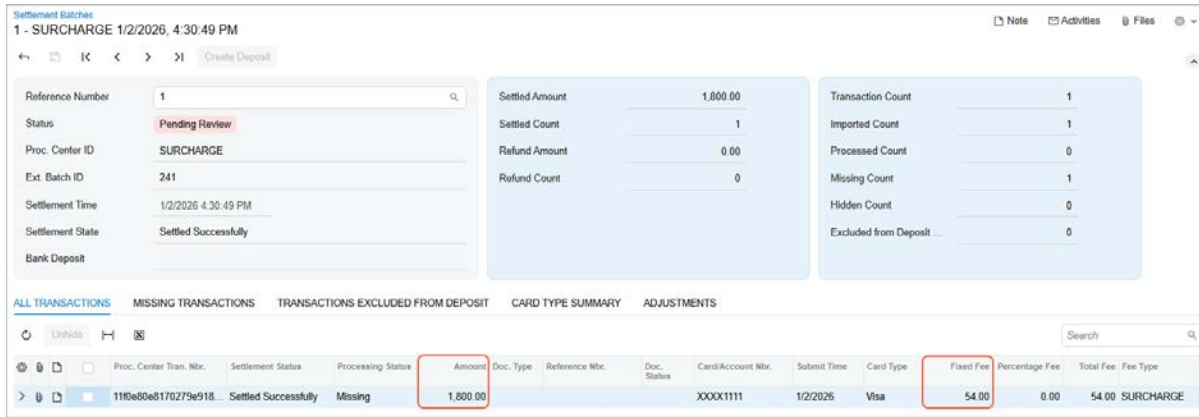


Figure: A payment with a surcharge in a settlement batch

The surcharge functionality supports monthly billing: The processing center bills at the end of the month and does not withhold the surcharge amount from the settlement batches. Because the surcharge is treated as funds coming in, it doesn't appear as a negative charge on the [Bank Deposits](#) (CA305000) form. Instead, it's included in the deposit amount displayed on the **Payments** tab, as shown below.

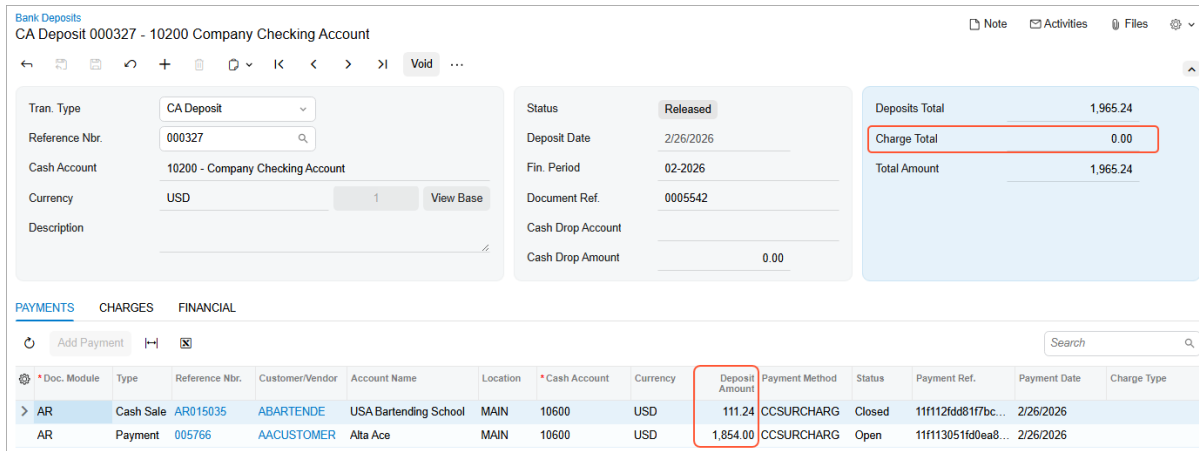


Figure: A bank deposit with surcharge amounts included in the totals

Reviewing Surcharges on Receipts

On the printed documents of the [Invoice/Memo](#) (AR641000) and [Payment Receipt](#) (AR643000) reports, every surcharge is now shown as a separate line item.

Below is the printed [Payment Receipt](#) report with a surcharge displayed in a separate line.


 Acumatica The Cloud ERP		Payment Receipt Reference Nbr.: 005766 Currency: USD	
Products Wholesale 11235 SE 6th St. Suite 140 Bellevue, WA, 98004 Phone: 206-555-1212 Web: www.revisiontwo.com			
BILL TO:			
Alta Ace 156 10th Ave Unit 1 New York NY 10011 United States of America Attn: Amelia Armstrong			
PAYMENT DETAILS:			
Type:	Payment		
Transaction Time:	26-Feb-26 03:20:13 AM		
Authorization Code:	13051f		
Payment Method:	Credit Card		
Card/Account Number:	Visa:****_****_****-1111		
Transaction Status:	Approved		
Surcharge amount:	54.00		
Payment Amount:	1,800.00		
Total Amount Paid:	1,854.00		

Figure: Receipt for a payment with a surcharge

This line appears on reports for documents that have the *Credit Card* or *POS Terminal* means of payment.

Quick Recap

- Enable surcharging through the processing center, and then configure it in Acumatica ERP by creating a new processing center and selecting a surcharge entry type.
- Users can review the surcharge before processing documents on the [Payments and Applications](#) (AR302000) and [Cash Sales](#) (AR304000) forms.
- Each surcharge is recorded as a read-only charge line and is posted separately to the GL on release.
- Customers can review the surcharge itemized on the [Invoice/Memo](#) (AR641000) and [Payment Receipt](#) (AR643000) reports.
- Built-in guardrails prevent surcharging where it isn't allowed (by state) or for non-credit-card methods, such as ACH, debit cards, or prepaid cards.

Learn More

For more details, see [Automatic Credit Card Surcharges](#).

Finance: Send Payment Links for Prepayment Invoices

Acumatica ERP 2026 R1 expands its payment link capabilities to **prepayment invoices**, delivering the same streamlined experience already available for other AR documents. With this enhancement, users can easily create an open payment link for a released prepayment invoice with the *Pending Payment* status and share it with customers as a convenient **URL** or **QR code** directly on the printed invoice.

Once a payment is made, Acumatica ERP can automatically update or close the prepayment invoice, if webhooks or a schedule are set up in the system. The system also keeps everything in sync if the document is voided or becomes unapplied, eliminating manual follow-up. To further simplify collections, users can automatically generate and send emails that include payment links, making it faster and easier for customers to pay.



This functionality is available when the *VAT Reporting*, *VAT Recognition on AP Prepayments*, and *VAT Recognition on AR Prepayments* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

Read on to learn how to set up and start using payment links.

Where you Work with Payment Links for Prepayment Invoices

- On the [Invoices and Memos](#) (AR301000) form: For documents with the *Prepmt. Invoice* type, the **Payment Links** tab now appears on the form (see below).

The screenshot displays the 'Invoices and Memos' form for a 'Prepmt. Invoice AR015033 - Alta Ace'. The 'Type' is set to 'Prepmt. Invoice' and the status is 'Unapplied'. The 'Payment Links' tab is selected and highlighted with a red box. Below this tab, there are fields for 'Processing Center' (ACUPAYMENT - Acumatica ...), 'Link Delivery Method' (None), 'Payment Link' (https://acumatica2p05w.sa...), and 'Link Status' (Closed). To the right of these fields are three buttons: 'Create Payment Link', 'Sync Payment Link', and 'Resend Payment Link'. The top right of the form shows navigation options like 'Note', 'Activities', and 'Files'.

Figure: The Payment Links tab on the Invoices and Memos form

- On the [Process Payment Links](#) (AR513500) form: Documents with the *Prepmt. Invoice* type are now shown on the form (see below).



Figure: A prepayment invoice on the Process Payment Links form

On both forms, you can create and synchronize payment links for prepayment invoices.

Automatic creation of payment links by business events is turned on by default.

When You Can Create a Payment Link

Payment links can be created for released documents only. On the [Invoices and Memos](#) (AR301000) and [Process Payment Links](#) (AR513500) forms, you can create a payment link for a prepayment invoice with the *Pending Payment* status.

The table below shows the availability of payment links by document status.

Status	Link Availability (Invoices and Memos form)	Link Availability (Process Payment Links form)
<i>Balanced</i> and other statuses before release	The Create Payment Link button on the Payment Links tab is unavailable.	The document doesn't appear in the table.
<i>Pending Payment</i> (after release)	The Create Payment Link button on the Payment Links tab is available.	The document appears in the table. The payment link stays open until the document is fully paid and all applications are released. Then the status changes to <i>Unapplied</i> or <i>Voided</i> , which closes the link.
<i>Unapplied, Closed, and Voided</i>	The Create Payment Link button on the Payment Links tab is unavailable.	The document doesn't appear in the table.

Only one open payment link can exist per document. If a prepayment invoice returns to the *Pending Payment* status, for example if the applied payment was voided, the system automatically creates a new payment link.

Creating and Syncing Payment Links

You can create and sync payment links for multiple documents at once or generate one payment link for an individual prepayment invoice, depending on your workflow.

The system takes care of this by automating the creation and update of payment links. The system triggers the *AR Invoice Payment Link Create* and *Invoice Payment Link Update* business events, which were predefined on the [Business Events](#) (SM302050) form.

If these business events are deactivated, you can manually create and update links on the [Process Payment Links](#) (AR513500) and [Invoices and Memos](#) (AR301000) forms.

Updating and Closing Payment Links

You can update a payment link if the due date or the unpaid balance of the prepayment invoice changes, for example, when you release applications.

A payment link is closed in both the processing center and in Acumatica ERP if all of the following conditions are met:

- The prepayment invoice is fully paid.
- All applications are released regardless of whether the payment came from a payment link or from another applied payment or document.

Paying Prepayment Invoices by Using Payment Links

The system notifies the customer about payment links created for prepayment invoices, as it does it for AR invoices.

Payment links will also appear on printed documents. To send a payment request, just run the *Invoice/Memo* (AR641000) report and share it with the customer. Once they receive this document, they can easily pay it by clicking a link. The printed report shows the payment link as a QR code and the *Pay now* link (see below).

CUSTOMER REF. NBR.		TERMS	CONTACT				
		30 Days					
NO.	ITEM	QTY.	UOM	UNIT PRICE	DISC.	EXTENDED PRICE	PREPMT. AMT
1	AALEGO500: Lego 500 piece set	1.00	EA	110.00	0%	110.00	55.00
2	Freight	1.00		10.00	0%	10.00	5.00

NOTE:	Sales Total:	60.00
	Tax Total:	11.00
	Total (USD):	71.00

Page: 1 of 1

Figure: A ready-to-print prepayment invoice with a payment link

When a customer clicks the link, the system opens a page in a new browser tab where they can quickly complete their payment.

For prepayment invoices created from sales orders with prepayment percent less than 100%, the details sent to the processing center take the prepayment percent into account. In the generated report, the **Prepmt. Amt** column shows the prepayment amount. If the prepayment percent is 100%, the amount in this column is the same as the amount in the **Extended Price** column.

Configuration and Access Notes for Administrators

The new functionality doesn't affect the existing access rights to the [Invoices and Memos](#) (AR301000) and [Process Payment Links](#) (AR513500) forms.

On the [Processing Centers](#) (CA205000) form, the **Create from SO Payment Link** box has been renamed to **Create from Payment Link (SO & Prepmt. Inv.)** (shown below). This box defines the document type for prepayment invoices as well.

Branch	Use by Default	Credit Card Payment Method	Credit Card Cash Account	EFT Payment Method	EFT Cash Account
PRODWHOLE	<input checked="" type="checkbox"/>	ACUPAYCC	10200	ACUPAYACH	10200

Figure: Payment link settings



If the customer class has the **Exclude from Payment Link Processing** check box selected on the [Customer Classes](#) (AR201000) form, the payment link functionality isn't available for the customers of this class.

For more information about configuration of payment links, see [To Configure Acumatica Payments](#).

Key Takeaways

- You can create payment links for **released** prepayment invoices when the document has the *Pending Payment* status.
- If an open payment link exists, a customer will see a QR code and the link on the prepayment invoice printed on the [Invoice/Memo](#) (AR641000) form.
- Payment links are closed automatically when the document is **fully paid**.
- For prepayments of less than 100%, payment link details sent to the processing center reflect the **prepayment percent**. The **PREPMT. AMT** in the report generated on the [Invoice/Memo](#) form shows the prepayment amount.

Learn More

For more information, see [AR Prepayment Invoices: Payment Links](#).

Finance: Settlement of Stripe Payments

In Acumatica ERP 2026 R1, the Stripe payment plug-in includes enhanced and expanded functionality. Businesses outside the US and Canada that use the Stripe processing center can now seamlessly import settlement batches directly from Stripe into Acumatica ERP. These new capabilities streamline financial reconciliation and improve efficiency.



This functionality is available only if the *Integrated Card Processing* and *Stripe Payment Plug-In* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

New Capabilities

- Stripe now provides the amounts of actual fees withdrawn for transactions, adjustments, or batch payouts. To support this data, when you set up a processing center that supports these fees, Acumatica ERP automatically adds an entry type for each fee type on the [Processing Centers](#) (CA205000) form. A fee type can be *Payment*, *Refund*, *Adjustment*, and *Batch*.
- Both automatic payouts and manual payouts are imported and processed in Acumatica ERP as *settlement batches*—groups of transactions that have been submitted together for settlement with a bank.



A payout is withdrawal of money from the Stripe balance to the customer's bank account. In rare cases, the payout may be a negative amount, which means that the withdrawal covers a negative Stripe balance.

A settlement batch for an automatic payout can have records on the **Adjustments** tab of the [Settlement Batches](#) (CA307000) form. These records represent adjustments and transfers in the Stripe payout, such as transfers for manual payouts, minimum-balance holds and releases, or dispute-related holds and releases.

- Adjustments and their fees are included in the bank deposit. The **Adjustment Amount** box on the [Bank Deposits](#) (CA305000) form includes the balance of adjustments. The **Adjustments Account** box is populated with the clearing account. This clearing account must be set up for a deposit account and a payment method on the **Clearing Accounts** tab of the [Cash Accounts](#) (CA202000) form. Both the deposit account and the payment method must refer to the Stripe processing center.

Functionality Setup

On the [Entry Types](#) (CA203000) form, you must add a *Disbursement* entry type for Stripe fees, as shown below.

* Entry Type ID	Disb./Receipt	* Entry Type Description	Module	Business Account	Default Offset Account Branch	Default Offset Account	Default Offset Subaccount	Use for Payment Reclassification	Reclassification Account	Deduct from Payment
> BANKFEE	Disbursement	Bank Fees	CA		61100	000-000		<input type="checkbox"/>		<input type="checkbox"/>
INTEREST	Receipt	Interest	CA		49300	000-000		<input type="checkbox"/>		<input type="checkbox"/>
STRIPEFEE	Disbursement	Stripe Fees	CA		61100	000-000		<input type="checkbox"/>		<input type="checkbox"/>

Figure: The entry type for Stripe fees

When you set up a processing center that supports detailed fee information, Acumatica ERP automatically adds the related records to the **Fees** tab on the [Processing Centers](#) (CA205500) form.

Processing Centers
STRIPEUSD - Stripe USD

Proc. Center ID * STRIPEUSD
Name * Stripe USD
 Active

Cash Account * 10200 - Company Ch...
Currency USD
Payment Plug-In * Stripe Plug-In

PLUG-IN PARAMETERS PAYMENT METHODS PREFERENCES **FEES**

Set Default Fee Search

* Fee Type	* Entry Type
> Adjustment	STRIPEFEE
Batch	STRIPEFEE
Payment	STRIPEFEE
Refund	STRIPEFEE

Figure: The fee types for the processing center

For each record, you need to specify the created *Disbursement* entry type.



If the processing center was originally created in a version earlier than 2026 R1, the **Fees** tab will be empty. To populate it with the predefined fee types, click **Set Default Fee** on the table toolbar of the **Fees** tab.

Settlement of Credit Card Payments

With Acumatica ERP, you don't need to manually record deposits of credit card payments to the bank account. The system can automatically create bank deposits based on payments settled with a bank. The system imports settlement batches from the Stripe processing center and creates bank deposits based on these batches.

For more details on setting up and performing settlement, see [Performing Settlement of Credit Card Payments and EFTs](#).

The sections below describe the changes in the settlement process for users of the Stripe processing center.

Importing Settlement Batches

You import settlement batches on the [Import Settlement Batches](#) (CA507000) form. When the process completes, you click a link in the **Reference Number** column to open the batch on the [Settlement Batches](#) (CA307000) form.

On this form, the **Net Amount** box in the Summary area matches the payout amount in Stripe. This value reflects the actual transfer amount to and from the customer's bank account.

If the batch has adjustments, they are shown on the **Adjustments** tab, and the number of adjustments is displayed in the **Adjustment Count** box (see below).

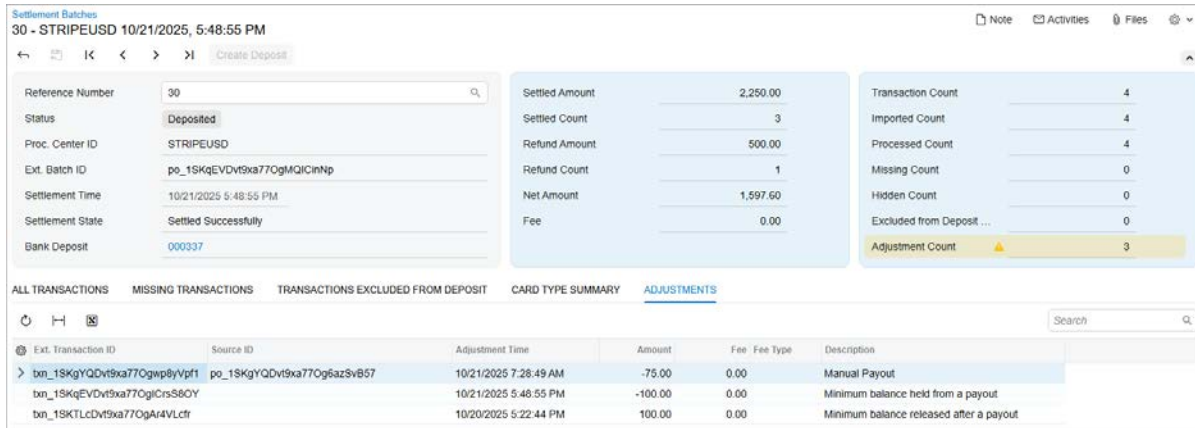


Figure: The list of adjustments in a settlement batch

The table below shows the settings displayed on the new **Adjustments** tab.

Column	Description
Ext. Transaction ID	The unique ID of the balance transaction for the adjustment.
Source ID	The ID filled in for adjustments such as manual payouts or disputes.
Adjustment Time	The time when the adjustment was made.
Amount	The adjustment amount, which is negative if it was withdrawn from the balance and positive if it was added to the balance.
Fee	The fee applied to the adjustment. A negative amount shows that it was withdrawn from the balance and a positive amount shows that it was added to the balance.
Fee Type	The fee type for the adjustment.
Description	The description of the adjustment.


Creating a Bank Deposit

The process of creating a deposit on the [Settlement Batches](#) (CA307000) form depends on the type of payout:

- For **automatic payouts**, the deposit amount and accounts are defined based on the documents matched to batch transactions. The amounts of the adjustments are included in the deposit.
- For **manual payouts**, the system uses the settings on the **Clearing Accounts** tab of the [Cash Accounts](#) (CA202000) form and searches for the manual payout account in the following order:
 - a. The clearing account from a record with the **Payment Method** column empty
 - b. The clearing account from any record the selected payment method refers to

The system applies the same logic when selecting the adjustment account.

When you click **Create Deposit** on the [Settlement Batches](#) form, the system creates a deposit and inserts its link in the **Bank Deposit** box.

 If no records have been added on the **Clearing Accounts** tab (a rare case), when you click **Create Deposit** on the *Settlement Batches* form, the system will display an error message. If you click **Yes** in the dialog box that opens, the system will set the batch's status to *Deposited*.

In a bank deposit for a manual payout, the batch amount for the manual payout batch is shown in the **Manual Payout Amount** box, as shown below.

Bank Deposits
CA Deposit 000334 - 10200 Company Checking Account

Tran. Type: CA Deposit
Reference Nbr.: 000334
Cash Account *: 10200 - Company Checking Account
Currency: USD
Description: Deposit of settlement batch from STRIPEUSD 9/22/2025

Status: On Hold
Deposit Date *: 9/22/2025
Fin. Period *: 09-2025
Document Ref. *: STRIPEUSD 9/22/2025

Manual Payout Account: 10250 - Company Mer...
Manual Payout Amount: 30.00

Deposits Total: 0.00
Charge Total: 0.00
Total Amount: 30.00

* Doc. Module	Type	Reference Nbr.	Customer/Vendor	Account Name	Location	* Cash Account	Currency	Deposit Amount	Payment Method	Status	Payment Ref.
---------------	------	----------------	-----------------	--------------	----------	----------------	----------	----------------	----------------	--------	--------------

Figure: A bank deposit created for a manual payout

 You can set up automatic bank depositing for a processing center by selecting the **Automatically Create Bank Deposits** check box on the **Preferences** tab of the *Processing Centers* (CA205000) form.

For automatic payouts, the **Adjustment Amount** box shows the resulting balance of adjustments, as shown below.

Bank Deposits
CA Deposit 000335 - 10200 Company Checking Account

Tran. Type: CA Deposit
Reference Nbr.: 000335
Cash Account: 10200 - Company Checking Account
Currency: USD
Description: Deposit of settlement batch from STRIPEUSD 10/20/2025

Status: On Hold
Deposit Date *: 10/20/2025
Fin. Period *: 10-2025
Document Ref. *: STRIPEUSD 10/20/2025

Adjustment Account: 10250 - Company Merchant ...
Adjustment Amount: -160.00

Deposits Total: 1,750.00
Charge Total: 77.40
Total Amount: 1,512.60

* Doc. Module	Type	Reference Nbr.	Customer/Vendor	Account Name	Location	* Cash Account	Currency	Deposit Amount	Payment Method	Status	Payment Ref.	Payment Date	Charge Type
> AR	Payment	005764	AACUSTOMER	Alta Ace	MAIN	10250	USD	500.00	STRIPE	Closed	pi_3SKJHHdVt9xa77Og2dVbmLKY	10/20/2025	
AR	Payment	005765	AACUSTOMER	Alta Ace	MAIN	10250	USD	750.00	STRIPE	Open	pi_3SKJKNDv9xa77Og2Yz0bLW0	10/20/2025	
AR	Payment	005766	AACUSTOMER	Alta Ace	MAIN	10250	USD	1,000.00	STRIPE	Open	pi_3SKJd1Dv9xa77Og1N9eSuCq	10/20/2025	
AR	Refund	005767	AACUSTOMER	Alta Ace	MAIN	10250	USD	-500.00	STRIPE	Closed	re_3SKJHHdVt9xa77Og2t8a9NDE	10/20/2025	

Figure: A bank deposit created for an automatic payout

Learn More

You might find these topic helpful: [Setup of the Stripe Processing Center](#), [To Create the Stripe Processing Center](#), and [Settlement of Stripe Payments](#).

Finance: Support of AMEX GL1025 in Bank Feeds

Starting in Acumatica ERP 2026 R1, you can import **American Express GL1025 bank statement files** through bank feeds. If your organization uses American Express corporate cards, this lets you process large volumes of employee expense transactions efficiently.

With this functionality, transactions provided in GL1025 format can be loaded automatically, reducing manual effort and streamlining expense processing.



This functionality is available only if the *Bank Feed Integration* and *AMEX GL1025 File Import for Bank Feeds* features are enabled on the [Enable/Disable Features](#) (CS100000) form. This solution is currently delivered as **experimental** to gather feedback and further refine the parsing logic.

How GL1025 Bank Feeds Are Processed

On the [Bank Feeds](#) (CA205500) form, you can select either *AMEX GL1025 (.txt)* or *AMEX GL1025 (.csv)* as the file format. Each file extension is treated as a separate file type with its own predefined parsing rules.

When a bank feed is configured to use one of the GL1025 formats, Acumatica ERP:

- Detects new GL1025 files placed in the connected SFTP folder
- Reads and parses file contents according to the GL1025 specification
- Creates bank transactions for the associated cash account
- Creates expense receipts for the corporate card and employee defined in the bank feed
- Prevents the creation of duplicate transactions by using the external transaction ID
- Supports standard bank feed actions, including test mode loading, manual loading, and sequential processing of multiple files

Bank Feed Setup

On the **Source File** tab of the [Bank Feeds](#) (CA205500) form, you (or a system administrator) can select the GL1025 format for the file extension. Below you can see the new options in the **File Format** box.

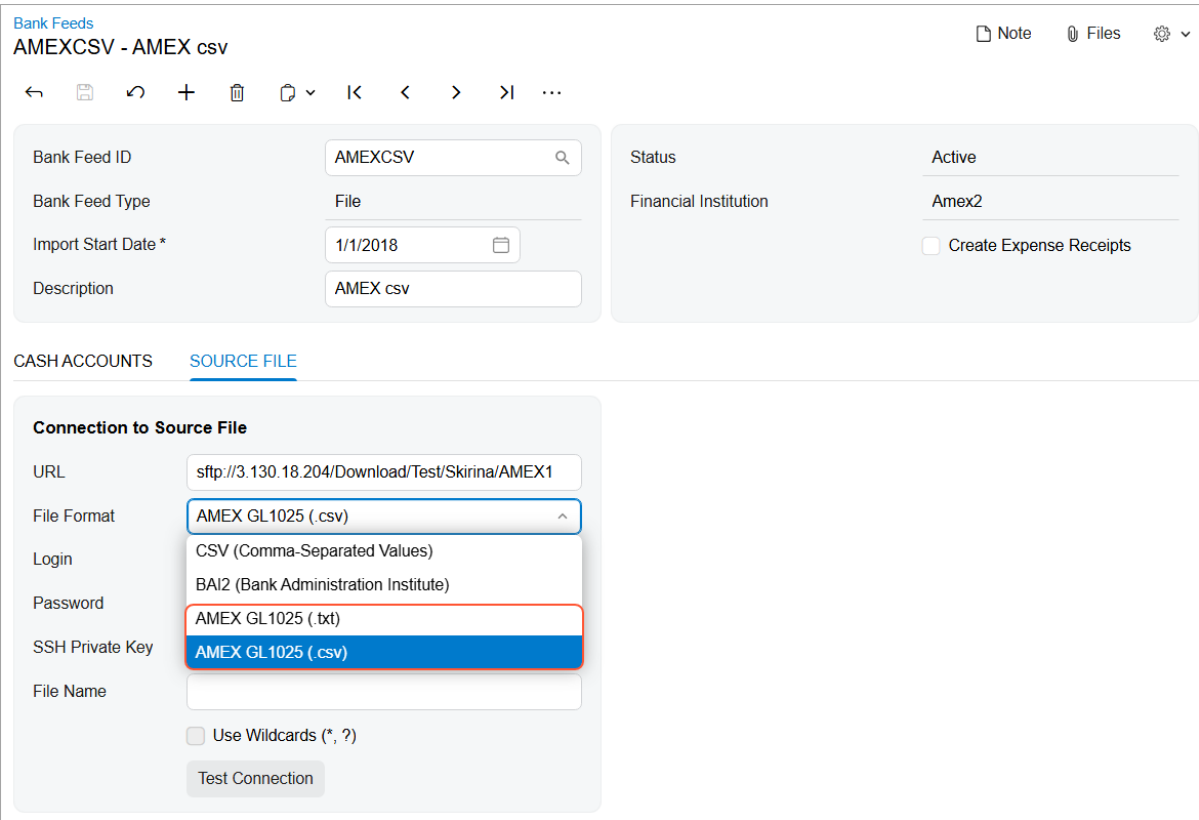


Figure: Setup of the source file for GL1025 format

In the **Mapping Rules** section of the **Source File** tab, fields in Acumatica ERP are mapped to GL1025 fields (see below).

The system applies predefined mapping rules to some fields; these mappings have the **Active** check box selected. The predefined mapping can be edited, if needed. To validate the mapping, you should load transactions by clicking **Load in Test Mode** on the form toolbar and review the results. For example, you may need to verify that the bank account is mapped to the correct field if the file contains multiple account levels.

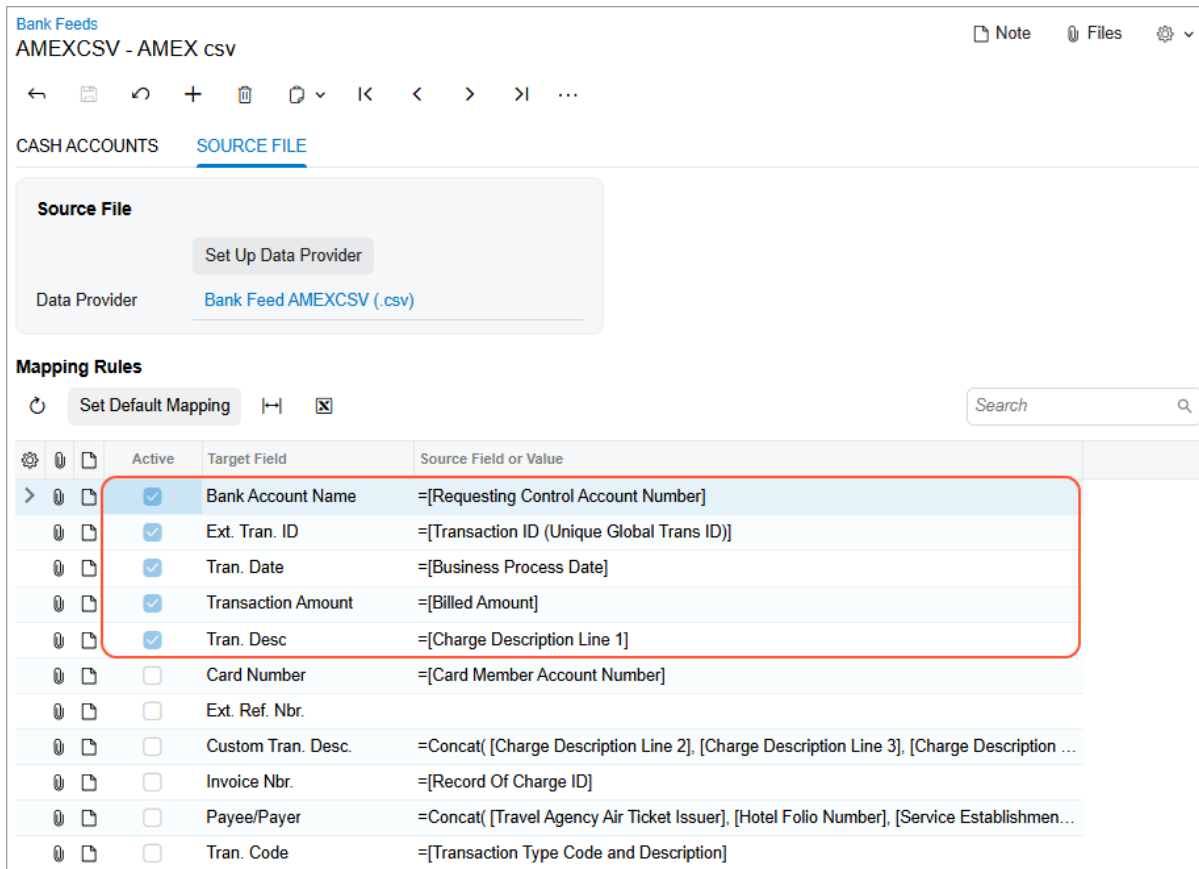


Figure: Required mapping of fields

Mapping of other fields is optional and is specified by the administrator.

File Detection and Import

You import AMEX statements in GL1025 format selected on the *Bank Feeds* (CA205500) form. Once the system retrieves a new GL1025 file, it parses the transactions and creates:

- Bank transactions for the cash account mapped to the bank account on the **Cash Accounts** tab of the *Bank Feeds* form, while preventing duplicates based on **TransactionID / Ext. TranID**
- Expense receipts for the corporate card and employee specified in the bank feed setup

Transaction Processing

When the system creates transactions, the values in the following fields will be truncated if they exceed the maximum length allowed in Acumatica ERP.

Field	Max. Length in Acumatica ERP
Transaction Description	512
Custom Transaction Description	512
Invoice Number	256
Payee/Payer	256

Field	Max. Length in Acumatica ERP
Transaction Code	35

The values of the following fields won't be truncated. If the value of a field exceeds the allowed length, you'll see an error when transactions are retrieved.

Field	Max. Length in Acumatica ERP
Transaction ID	255
Card Number	25
Ext. Ref. Nbr.	40

Learn More

For more information, see [Loading of Bank Feeds from an AMEX GL1025 File](#).

For details on how to set up bank feeds for AMEX GL1025, see [To Set Up Bank Feeds Loaded from an AMEX GL1025 File](#).

For additional information about the loading and processing of bank transactions, see [To Load Bank Transactions from a File](#).

Integrations: Annotate PDF Attachments

Need to annotate a PDF attached to a record—highlight a total on a vendor bill, add a sticky note to a contract, or mark up an architecture design plan before it goes to the project manager? You no longer need to download files, use external tools, or keep track of versions. With PDF Annotator embedded in Acumatica ERP starting in Version 2026 R1, you can review and annotate PDF files directly from the record where they're attached.



This functionality is available if the new *PDF Annotator Integration* feature in the *Third-Party Integrations* feature group is enabled on the [Enable/Disable Features](#) (CS100000) form.

Curious how it works? Let's explore.

What's Required for the Integration

You must do the following at the system level before the PDF Annotator integration can be set up:

1. Sign in to the [Adobe Developer website](#) and get credentials for the Adobe PDF Embed API.
2. Obtain the PDF Annotator Embed Key that Adobe generates for your credentials.

Setting Up the Integration

With the *PDF Annotator Integration* feature enabled, the new *PDF Annotator Embed Key* application type becomes available on the [External Applications](#) (SM301000) form, as shown below. If you're a system administrator, you create the external application for PDF Annotator integration as follows:

1. Select the *PDF Annotator Embed Key* type.
2. Enter the application name.
3. Enter the client ID.
4. Save your changes.

The screenshot shows the 'External Applications' form. The 'Type' dropdown is highlighted with a red box and set to 'PDF Annotator Embed Key'. The 'Application ID' is 'PDF Annotator' with a search icon and a 'Predefined' checkbox. The 'Application Name *' is 'PDF Annotator' and the 'Client ID *' is a text input field. Below the form is a 'TOKENS' section with a table showing 'Expires On' and 'Bearer'.

Figure: The new application type

Opening the PDF Preview of a File Version

With the PDF Annotator integration set up, you can start annotating PDF files. These capabilities are provided in the side panel of forms with the **Files** button on the form title bar. In the side panel, you click the **PDF Files** icon to work with the preview of the PDF on the *PDF Preview* (SM400009) form.

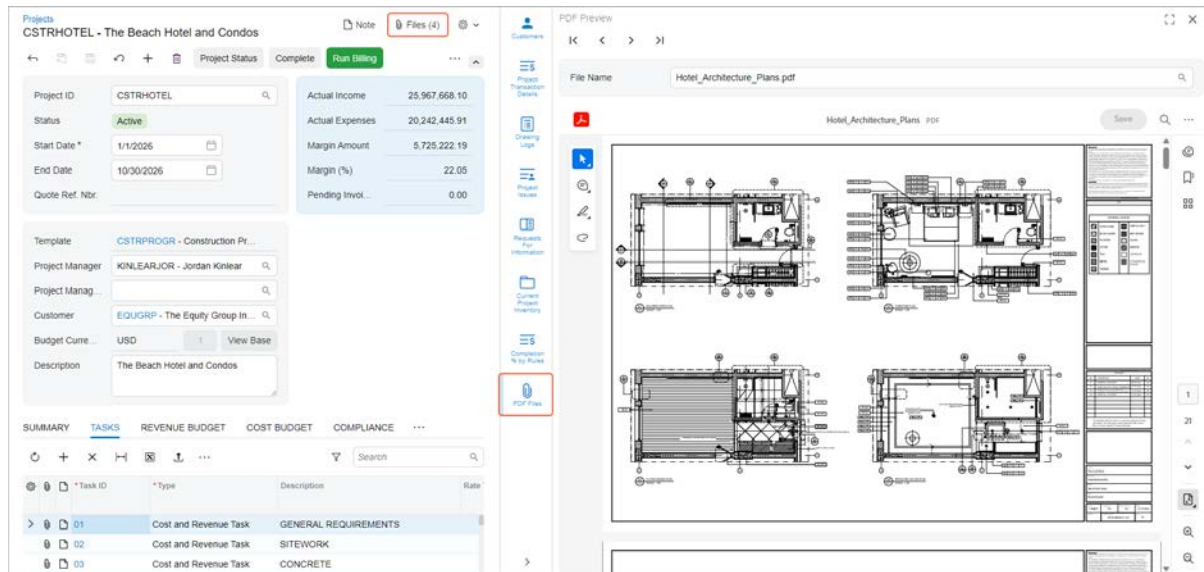


Figure: The Projects form with the new side panel tab

In the **File Name** box of the Summary area, you select a PDF file attached to the current record. (Only document-level attachments are available for selection.) The lookup table lists the latest version of the file. If a user has added any comments or markup by using PDF annotations, the system populates the **Comment** column for this file.

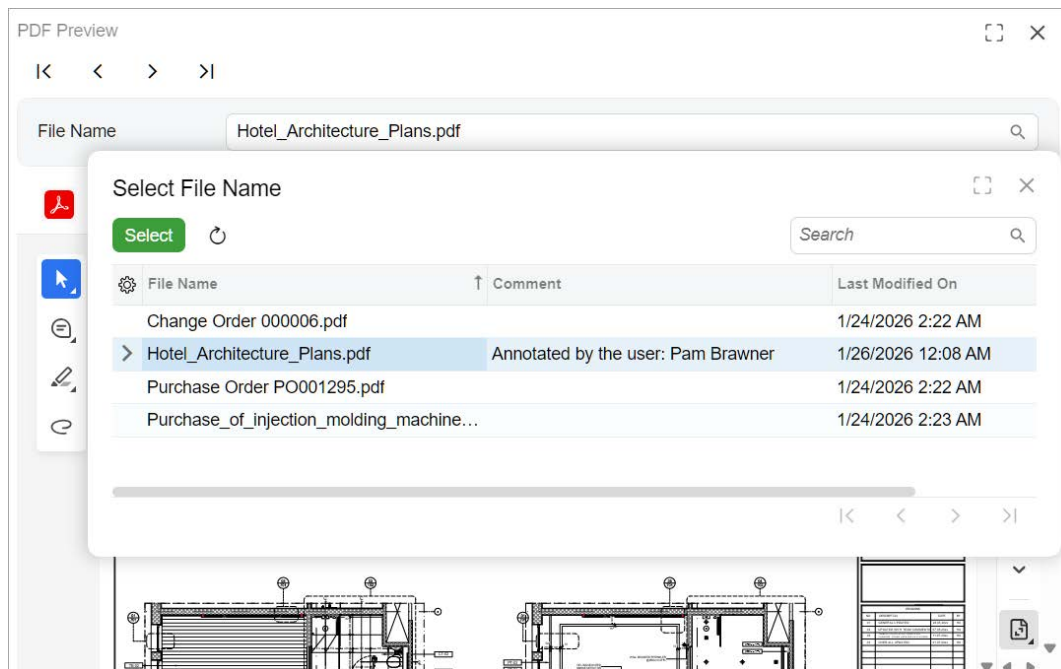


Figure: Selecting a file

Commenting on and Annotating a File Version

On the *PDF Preview (SM400009)* form of Acumatica ERP, you can add comments and markups by using the tools available in the embedded PDF Annotator viewer.

PDF Annotator doesn't support simultaneous editing of a single version of a file. If two users modify the same file at the same time, the system creates separate versions—one containing each user's changes.



Each time you click **Save** on the top toolbar of the PDF preview area, the system creates a new file version. To avoid creating multiple versions, save your changes only when you've completed editing the file version.

Managing Access Rights

To have full access to the *PDF Preview (SM400009)* form, users must be assigned the new *PDF Annotator* role on the [User Roles \(SM201005\)](#) form.

By default, users with the following roles have the *Delete* access level to the new *PDF Preview* form:

- *System Administrator*
- *Acumatica Support*

Annotation Tools

On the *PDF Preview (SM400009)* form, you can add review notes and annotate the selected file version. You use the buttons and commands in the following places in the embedded PDF Annotator viewer:

- The top toolbar, including the More menu button (Item 1 below)
- The quick action toolbar, including the **Select text**, **Add a comment**, and **Highlight selected text** menu buttons (Item 2)
- The right pane (Item 3)
- The page control toolbar, including the **View one page at a time** menu (Item 4)



The buttons and commands are available through the integration with the PDF Annotator; they can't be changed.

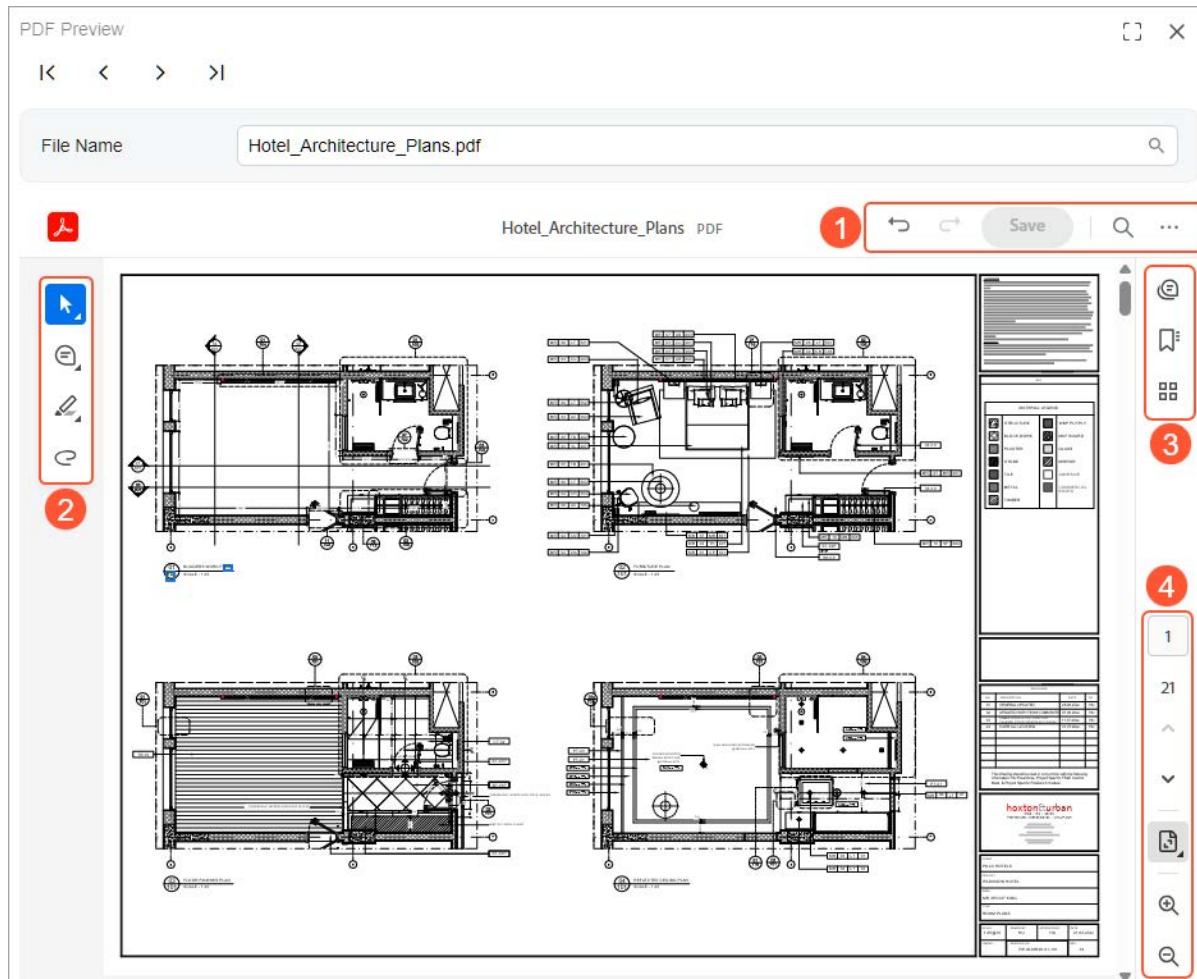


Figure: The main tools in the viewer

See the table below for descriptions of the tools available in the embedded PDF Annotator viewer.

Table: Annotation Tools: Reference Table

Location	Button/Command	What You Can Do	Notes
Top toolbar	Undo	Reverse your most recent change	You can use the Ctrl + Z keyboard shortcut instead.
Top toolbar	Redo	Reapply the last change you undid	You can use Ctrl + Z keyboard shortcut instead.
Top toolbar	Save	Save the changes and create a new file version.	
Top toolbar	Find in document	Search for text within the file	You can use Ctrl + F keyboard shortcut instead.
More menu	Print this file	In the dialog box that opens, specify printing settings and print the document	

Location	Button/Command	What You Can Do	Notes
More menu	Download this file	Download and save a copy of the file to your device	
More menu	View legal notices	Open Adobe's legal notices	These include copyright, trademark, terms, privacy, and third-party notices.
Quick action toolbar	Select text	Open the Select Text menu	
Quick action toolbar	Add a comment	Open the Add a comment menu	
Quick action toolbar	Highlight selected text	Open the Highlight selected text menu	
Quick action toolbar	Draw freehand	Draw or write directly on the PDF	
Quick action toolbar	Eraser	Remove the drawing	
Quick action toolbar	Choose a color for a note	Select the color used for your note or markup	
Select text menu	Select	Select text in the file to review it or apply a markup to it	
Select text menu	Pan	Move the PDF view by dragging and dropping the page	
Add a comment menu	Add a comment	Add a comment thread linked to a spot in the file	The comment text isn't placed on the page.
Add a comment menu	Add text comment	Insert a text box directly on the page	The comment text is visible on the page.
Highlight selected text menu	Highlight	Highlight the text with a colored background	
Highlight selected text menu	Underline	Underline the selected text	
Highlight selected text menu	Strikethrough	Draw a line through the selected text	
Right pane	Comments	Open the Comments pane to view all comments in one place; add and reply to comments	

Location	Button/Command	What You Can Do	Notes
Right pane	Bookmarks	Add a bookmark or open the list of bookmarks to go to a bookmarked page	
Right pane	Page thumbnails	Open the Pages pane to view miniature pages for quick navigation	
Right pane	View Permission Details	Open the Permission Details page, which you use to view the file's properties and allowed actions	This appears when some actions are restricted for the document.
Page control toolbar	Go to a specific page number	Jump to the page you type in	Enter the number of the page and press Enter.
Page control toolbar	Go to previous page	Move one page back	
Page control toolbar	Go to next page	Move one page forward	
Page control toolbar	Zoom In	Make the page look bigger	You can use the Ctrl + keyboard shortcut instead.
Page control toolbar	Zoom Out	Make the page look smaller	You can use the Ctrl - keyboard shortcut instead.
View one page at a time menu	Single-page view	Show one page at a time	
View one page at a time menu	Two-page view	Show two pages side by side	
View one page at a time menu	View with scrolling	Show pages in a continuous column so that you can scroll through the document	
View one page at a time menu	Fit one page	Resize the view so that the whole page fits on the screen	
View one page at a time menu	Fit to width	Resize the view so that the page width matches the preview width	
View one page at a time menu	Full screen	Show only the PDF (hide menus and toolbars)	

Upgrade Notes

If you used the *PDF Annotator* customization package previously, your existing client ID specified on the legacy *Adobe Preferences* form won't be migrated automatically. After the upgrade to Acumatica ERP 2026 R1, you must:

1. Obtain a new client ID from Adobe.

2. Enable the *PDF Annotator Integration* feature on the [Enable/Disable Features](#) (CS100000) form.
3. Create an external application with the *PDF Annotator Embed Key* type and your new client ID on the [External Applications](#) (SM301000) form.

New Capabilities

- Annotate PDF files directly from a record by using the embedded PDF Preview area.
- Work with the latest system version and see who annotated it.
- Use built-in tools to add comments and markups, such as text comments, highlights, and freehand drawings.
- Control full access to the *PDF Preview* (SM400009) form by using a dedicated user role.

Integrations: Expanded Acumatica Add-In for Outlook (Modern UI)

Starting in Acumatica ERP 2026 R1, the Acumatica add-in for Outlook provides expanded capabilities for working with emails. While viewing an email in Outlook, you can now:

- Quickly view related and linked records to better understand the email's context and find needed information
- Create a wide range of Acumatica ERP records based on the email—directly from the add-in.
- Link the email to related or new records with just a few clicks

These capabilities are available only when you use the add-in **in the Modern UI**. During the add-in's installation, you can select the version to use: Modern UI or Classic UI. However, only the Modern UI features the expanded functionality described in this topic.



This functionality is available only if the *Outlook Integration* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Continue reading to explore the new capabilities.

Highlights

When you use the Acumatica ERP add-in for Outlook in the Modern UI, you can:

- **Instantly access context:** Review all Acumatica ERP records that have been linked to the open email, as well as other records related to it, without leaving Outlook. This can give you immediate insight into the customer or project history.
- **Build additional connections:** Link the email you're viewing—along with its attachments—to any number of additional records in a single workflow.
- **Create the records you need on the spot:** Create Acumatica ERP records based on the email and link each record to the email.

Setting Up the Add-In Interface

You can use either the Modern UI or the Classic UI in the Acumatica add-in for Outlook, depending on whether or not you want to use the new capabilities.

Before downloading the manifest file for the add-in installation, review the option in the new **Outlook Add-In UI** box of the [Site Preferences](#) (SM200505) form. You can select *Modern* or *Classic*. By default, the box contains the **Default UI** option selected when the system was first deployed.

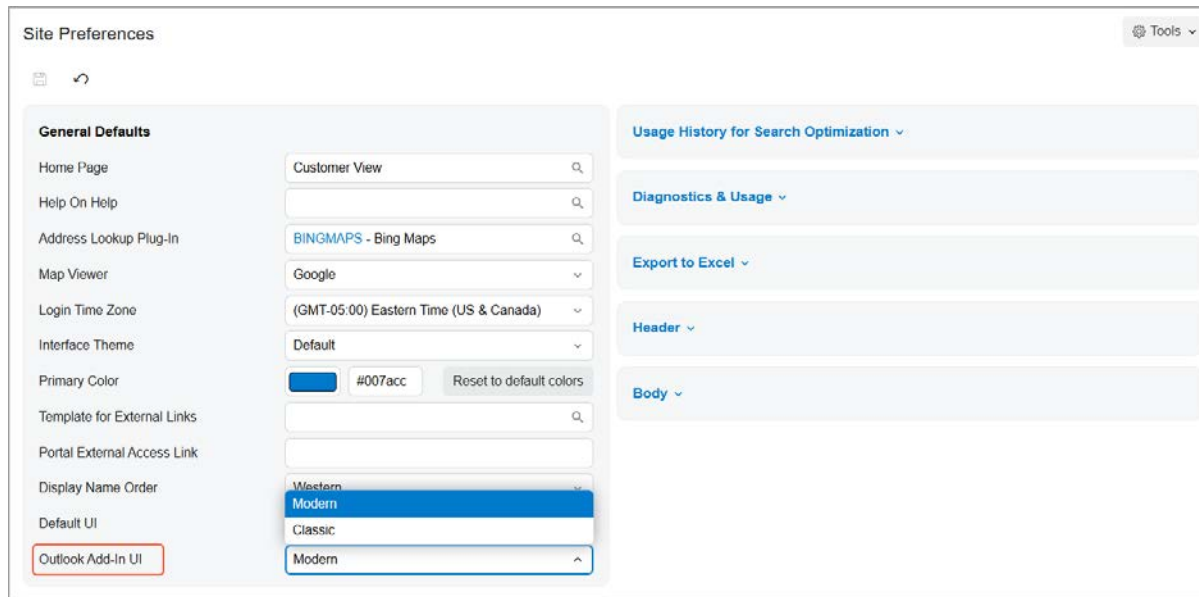


Figure: The Outlook Add-In UI box



If the system is upgraded from Acumatica ERP 2025 R2 or an earlier version, the *Classic* add-in interface is selected by default.

After you download the manifest file to your device, you can easily identify which interface the manifest file was generated for by looking at its name. The manifest file created for the Modern UI includes Modern UI in the name, such as *OutlookAddinManifestModernUI*. Install the add-in, as described in [Acumatica Add-In for Outlook: To Install the Acumatica Add-In](#).

Next, let's explore the new capabilities, enhancements, and redesigned experience available in the Acumatica add-in for Outlook with the Modern UI.

Getting Started with the Modern UI

When you launch the Acumatica add-in with the Modern UI for the first time, the add-in panel displays an introductory page that highlights its key functionality. Click **Next** to go to the Sign-In page.

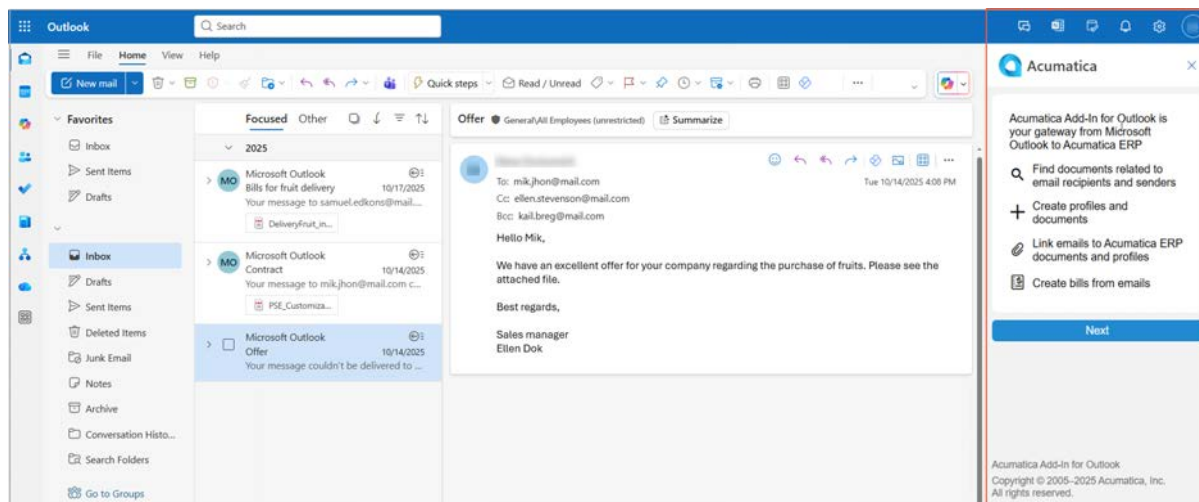


Figure: The introductory page

After you sign in, open any email and click the More Apps icon on the ribbon toolbar or in the upper-right corner of the email. In the list of apps, you'll see the Acumatica button. Click it to run the add-in.

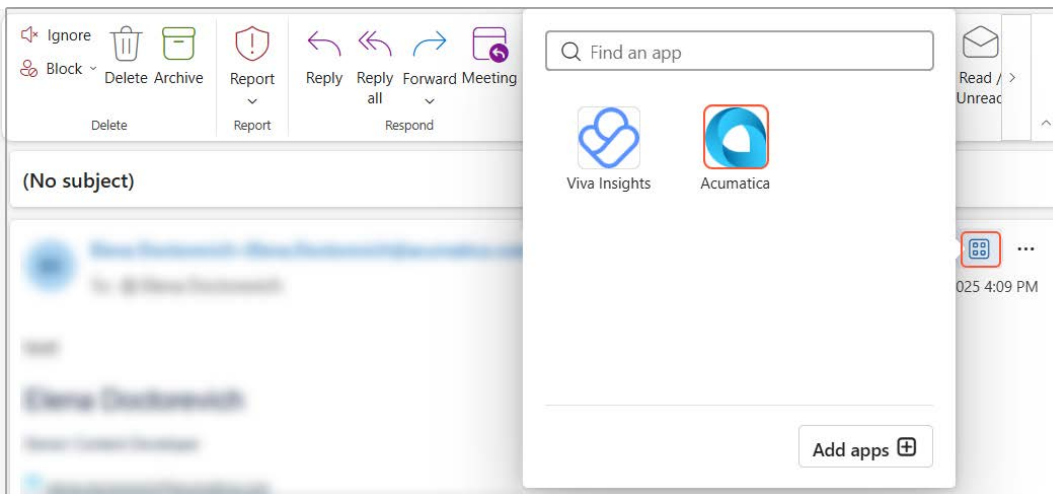


Figure: The Acumatica button

The add-in panel shows one of the following pages, depending on the email you're viewing:

- *Linked Records* if the email has been linked to any records in Acumatica ERP—that is, if the email activity has been created for the records.
- *Related Records* if the email has no existing links to records in the system.



The related records contain the same email address as the sender of the opened email or one of the recipients.

This introductory page helps you quickly understand the context for the email and decide what to do next.

Reviewing Linked Records

On the Linked Records page (see below), the following sections show records linked to the email:

- **Email Attached To:** Records (profiles—such as business accounts or contacts—and documents) linked to the email or its attachments
- **Incoming Documents:** The attached documents that have been submitted to Acumatica ERP for recognition



This section is available if the *AP Document Recognition Service* feature is enabled on the [Enable/Disable Features](#) (CS100000) form and the attached document is in a recognizable format, such as PDF. For details, see [Acumatica Add-In for Outlook: Incoming Document Management](#).

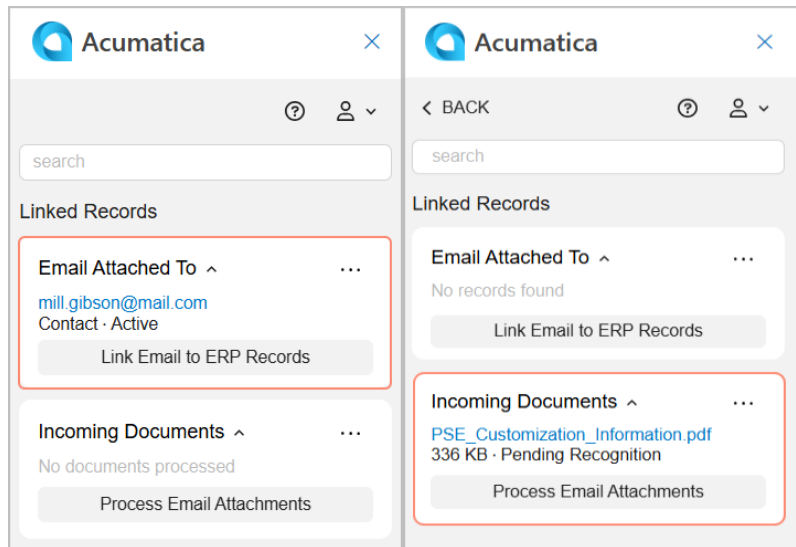


Figure: The Linked Records page

To link the email to additional records, click **Link Email to ERP Records** to open the Related Records page.

Linking an Email to Related Records

On the Related Records page, select an email address in the Filter box (shown below) to see the records that contain this email address. You can filter records by the email address of the sender or any recipient. By default, the *From* address is selected.

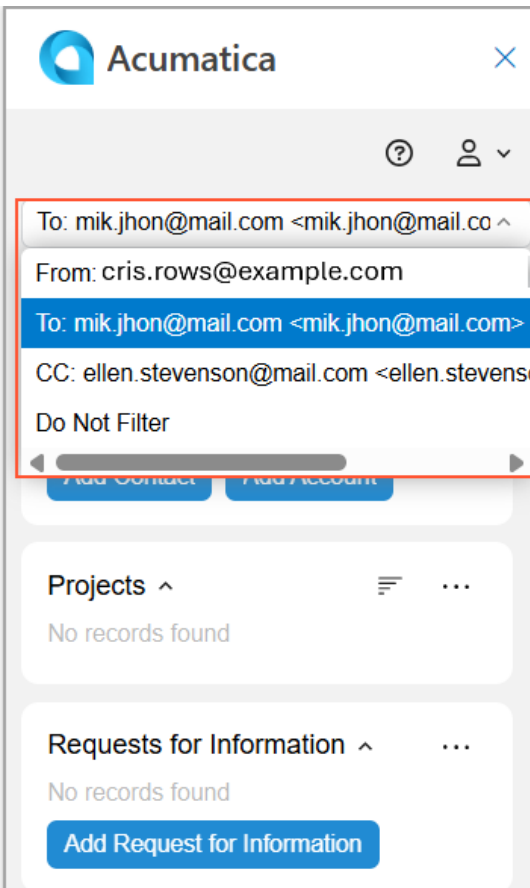


Figure: The filter options

If you select *Do Not Filter* in the Filter box, the page displays records, grouped by type, that have been created in Acumatica ERP, including records that aren't related to the email. This option is useful if you want to link the email to a record—such as a project—that doesn't contain any of the email addresses from the opened email. To find a particular record quickly, use the Search box.

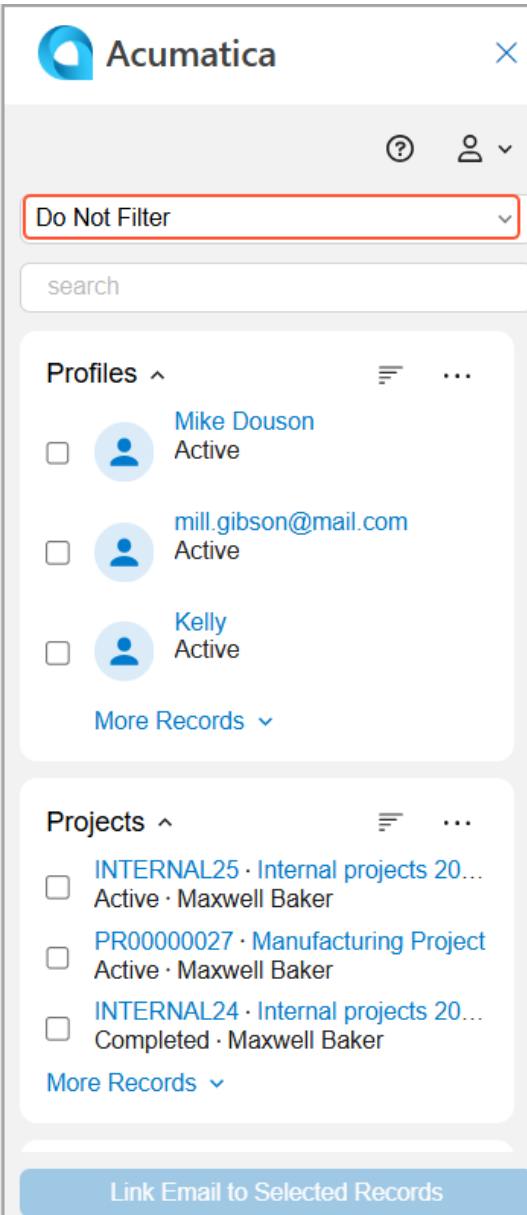


Figure: The Do Not Filter option

Below the Filter and Search boxes, you see records, grouped by type, that are available for linking. Initially the groups of records are expanded. You can collapse them as shown below.

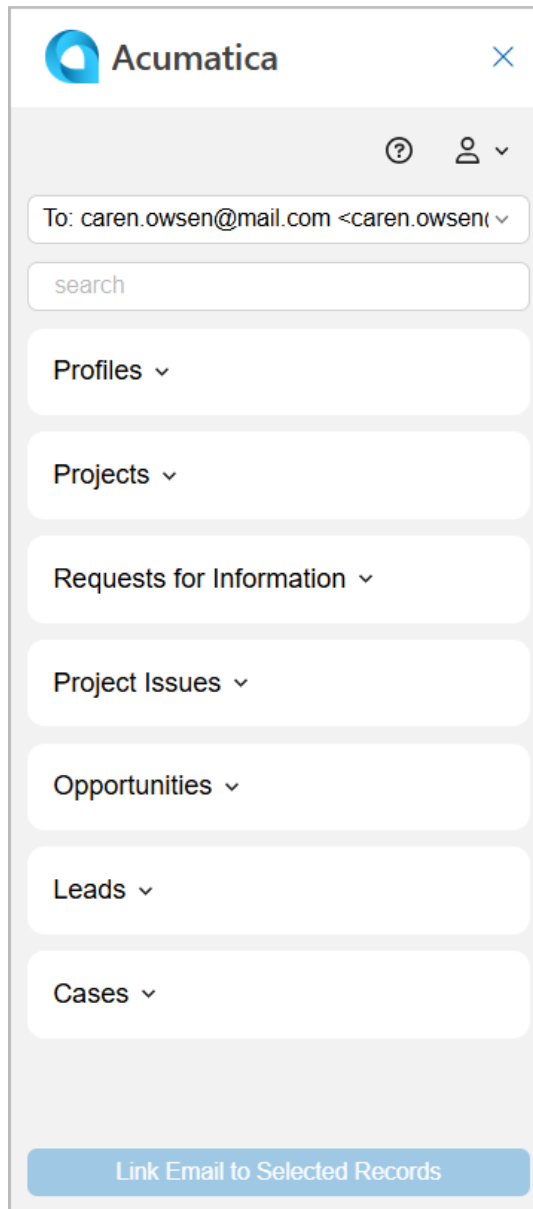


Figure: Groups of records

After you select one or more records, click **Link Email to Selected Records** (see below). The Email Activity page opens in the add-in panel so that you can complete the linking process.

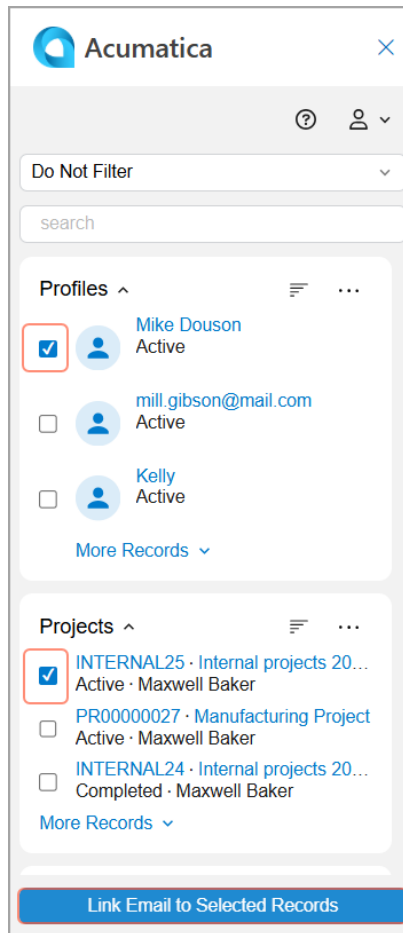


Figure: Selection of records to link with the email

Creating an Email Activity

On the Email Activity page of the add-in panel, you can save the opened email in Acumatica ERP by creating a new email activity and linking it to the records you've selected on the Related Records page.



You can select only one record of each type in the **Profiles** group and only one record from any other group of records at a time.

Depending on the type of the records you select, the system may fill in some boxes of the Email Activity page (as shown below).

Figure: The Email Activity page

When you save the email activity, the system:

- Opens the Linked Records page with the records linked to the email shown in the **Email Attached To** section.
- Displays the saved email activity on the **Activities** tab of the Acumatica ERP data entry form corresponding to the record selected in the **Related Entity** box.
- Saves any email attachments as files linked to the email activity.
- Changes the status of the email activity to *Completed* and fills in the **Completed On** box with the current date and time.

For details, see [Acumatica Add-In for Outlook: Email Activity Management](#).

Creating Related Records

On the Related Records page, you can create new records in Acumatica ERP based on the selected email address or the message's content. To do this, use the buttons in the record groups, such as **Add Opportunity** or **Add Contact** (see below).

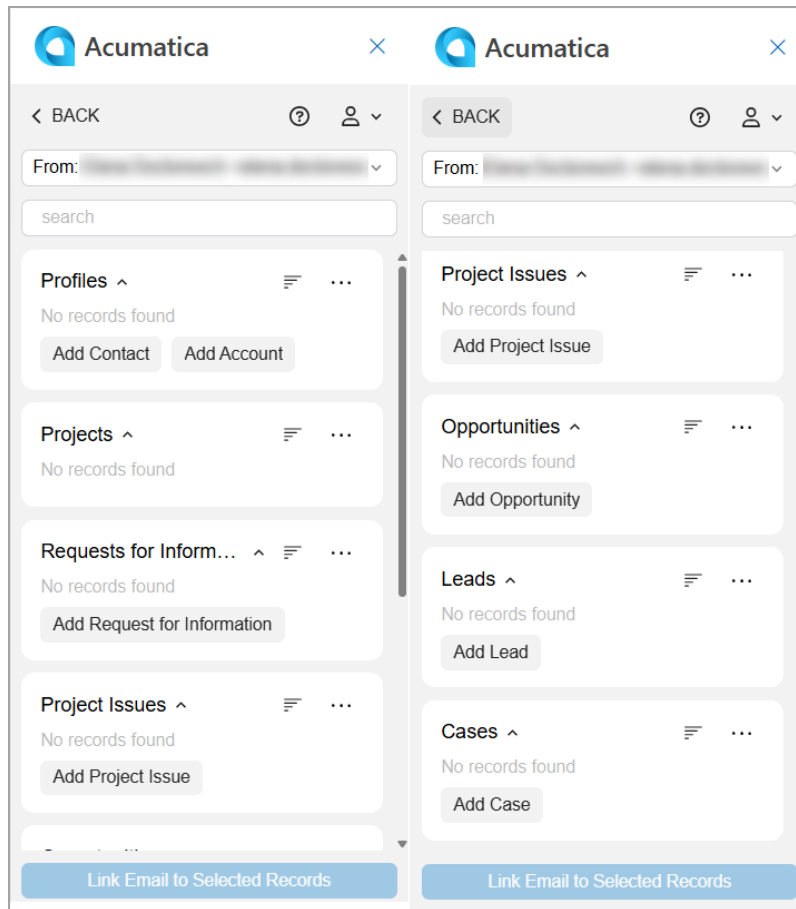


Figure: The buttons for creating new records

When you click one of these buttons, you can create the corresponding record directly in the add-in. When you save the new record, one of the following happens, depending on whether you select the **Link Email to Contact** check box on the record's entry form:

- If the check box is cleared, the list refreshes, displaying the new record.
- If the check box is selected, the Email Activity page opens. When you save the email activity, the email is linked to the new record in Acumatica ERP.

In the *Learn More* section, you'll find links to information on creating these records.

Recognizing Attachments

To recognize an email attachment in Acumatica ERP, click **Process Email Attachments** on the Linked Records page. On the Attachment Selection page, select the document you want to submit for recognition and click **Process**.

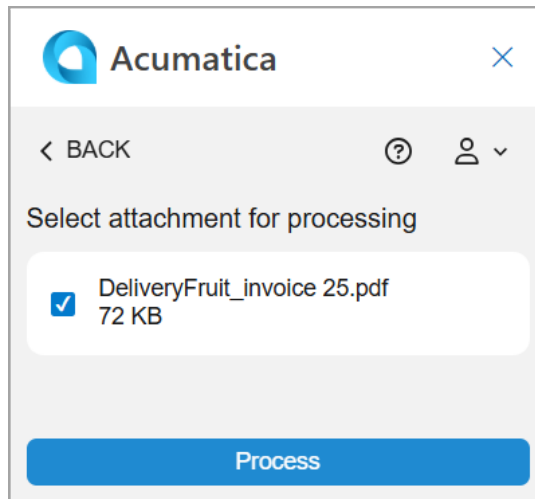


Figure: The Attachment Selection page

When processing completes, the Linked Records page refreshes and shows the recognized document in the **Incoming Documents** section.

Learn More

- For configuration and usage details for the Acumatica add-in for Outlook, see [Add-In for Outlook: Modern UI](#).
- For information about installing the add-in for the Classic UI, see [To Install the Acumatica Add-In](#).
- For details about the access rights to each add-in page and the creation of each type of record, see the needed topic:
 - [Acumatica Add-In for Outlook: General Information](#)
 - [Acumatica Add-In for Outlook: Email Activity Management](#)
 - [Acumatica Add-In for Outlook: Contact Management](#)
 - [Acumatica Add-In for Outlook: Business Account Management](#)
 - [Acumatica Add-In for Outlook: Lead Management](#)
 - [Acumatica Add-In for Outlook: Opportunity Management](#)
 - [Acumatica Add-In for Outlook: Case Management](#)
 - [Acumatica Add-In for Outlook: Requests for Information Management](#)
 - [Acumatica Add-In for Outlook: Project Issue Management](#)

Integrations: Electronic Document Signing

You no longer need to apply a customization project to sign electronic documents within the system. In Acumatica ERP 2026 R1, you can **send documents for electronic signing, track the signing process, and sync signed files with the system** by using DocuSign™ and Adobe® Acrobat® Sign.



These capabilities are available if the new *eSign Integration* feature in the *Third-Party Integrations* feature group is enabled on the [Enable/Disable Features](#) (CS100000) form.

You can access these capabilities in the new **eSign** category of the **Integration** workspace by using these links to the new forms:

- *eSign Accounts* (ES301000)
- *Manage eSign Documents* (ES401000)
- *eSign Sync* (ES501000)

The sections below walk you through how the integration is configured and how documents are sent for electronic signing and tracked in the system.

Requirements for the Integration

The following steps must be confirmed at the system level before you set up the integration with the esignature provider:

- Configure an API application in the provider's portal: DocuSign™ or Adobe® Acrobat® Sign.
- Get the credentials for the API application.

Creating Each Electronic Signing Account

If you're a system administrator, you create at least one electronic signing account that's used to connect Acumatica ERP to an esignature provider. To do this, you use the *eSign Accounts* (ES301000) form, shown below. You can create multiple accounts for the same provider—for example, one per employee or one shared account for a team.

To create an account for an individual, you enter the following and save the record:

1. The account name
2. The provider
3. The *Individual* account type
4. The provider credentials and API connection settings

The screenshot shows the 'eSign Accounts' configuration page. The account name is 'ADOBE ACROBAT'. It is set to 'Active', 'Connected', and 'Individual' type. The provider is 'Adobe® Acrobat® Sign' and the employee is 'EP00000002 - Maxwell Baker'. The API connection details include a URL, Client ID, and Client Secret. Under the 'NOTIFICATION' section, 'Reminders' are set to 'Daily' with 'Send Automatic Reminders' checked, and the 'Expiration' period is set to 120 days.

Figure: An eSign account for an individual

To create an electronic signing account that will be used by multiple employees, you enter the following and save the record:

1. The *Shared* account type
2. On the **Employees** tab, which appears, the list of the employees

This screenshot shows the 'eSign Accounts' form for a shared account. The account name is 'ADOBE ACROBAT', it is 'Active' and 'Connected', and the type is 'Shared'. The API connection details are the same as in the previous figure. The 'NOTIFICATION' section has the 'EMPLOYEES' tab selected. Below this, a table lists the employees associated with the account:

Employee ID	Employee Name
> EP00000002	Maxwell Baker
EP00000003	Layla Beauvoir
EP00000007	Pam Brawner

Figure: An eSign account shared by multiple people

Connecting to the Esignature Provider

After you specify the API connection settings for an account on the *eSign Accounts (ES301000)* form, you click **Connect** on the form toolbar. The system then:

- Starts the provider's OAuth authorization flow
- Makes the **Connect** button unavailable and the **Disconnect** button available if the connection is successful

Now that the account is connected, you're ready to submit documents for an esignature.

Opening a File to Request an Esignature

You can request esignatures for electronic documents—such as contracts, quotes, purchase orders, or sales orders—or for other files attached to a record in the system.

To submit a document for electronic signing, you:

1. Open the **Files** dialog box from the record's form.
2. Click **Edit** to open the file on the *File Maintenance* (SM202510) form.
3. If the **Versions** tab shows multiple versions of the file, click the version that should be signed electronically.
4. On the table toolbar (see below), click the new **Request eSignature** button.



The button is available for only the supported file extensions: .pdf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, .wp, .txt, .rtf, .tif, .jpg, .jpeg, .gif, .bmp, .png, .htm, and .html.

In the new table columns (see below), you can view information about the process of electronically signing the file.

The screenshot shows the 'File Maintenance' form for a file named 'Change Orders (000015)Change Order 000015.pdf'. The 'VERSIONS' tab is selected, displaying a table of file versions. The table has the following columns: Version ID, Created By, Creation Time, File Size, Comment, Original Name, Owner, eSign Account, Provider, eSign Status, Status Updated On, and Signed Version. The 'Request eSignature' button is highlighted in the toolbar above the table.

Version ID	Created By	Creation Time	File Size	Comment	Original Name	Owner	eSign Account	Provider	eSign Status	Status Updated On	Signed Version
1	Maxwell Baker	1/22/2026 11:37 PM	104 KB								

Figure: The new elements

Requesting an Esignature

When you click **Request eSignature** on the *File Maintenance* (SM202510) form, the dialog box opens. To submit the file, you do the following (see below):

1. Select an eSign account.
2. Select the provider.
3. Enter the subject and message for the email that the provider will generate.
4. Optional: Set an automatic reminder for recipients.
5. Optional: Set an expiration period for the request to electronically sign the document.
6. In the **Recipients** table:
 - a. Add recipients' email addresses.
 - b. Select recipients' roles.
 - c. Optional: Add a separate note for a specific recipient.

Figure: Requesting an esignature

When you click **Request eSignature** in the dialog box, the esignature provider's webpage opens so that you can complete the sending process.

When the sending is complete, the system updates the esignature details—such as the sender, electronic signing account, and status—on the [File Maintenance](#) form, as shown below.

Version ID	Created By	Creation Time	File Size	Comment	Original Name	Owner	e-Sign Account	Provider	e-Sign Status	Status Updated On	e-Signed Version
1	Maxwell Baker	1/21/2026 9:58 PM	90 KB			Maxwell Baker	DOCUSIGN	DocuSign™	Created	1/21/2026 10:32 PM	

Figure: The information about a requested esignature for the document

Managing Electronic Documents

On the *Manage eSign Documents (ES401000)* processing form, you manage electronic documents that have been submitted for esignature. In the Summary area, you can view your employee name and ID. By default, the **Show Mine** check box is selected, meaning that the form lists only documents you have submitted for esignature.

Name	Subject	Owner	Provider	eSign Status	Recall Reason
Purchase Orders (RO PO002763);Purchase Order PO002763.pdf	Purchase of injection molding machine	Maxwell Baker	DocuSign™	Completed	
Sales Orders (QT QT001067);Quote QT001067.pdf	Quote to sign	Maxwell Baker	Adobe® Acrobat® Sign	Draft	
> Change Orders (000006);Change Order 000006.pdf	[DEMO USE ONLY] Sign the change order	Maxwell Baker	Adobe® Acrobat® Sign	Out For Signature	

Figure: The Manage eSign Documents form

To manage the signing process, you can use the following buttons on the form toolbar:

- **Recall Document:** Cancels an esignature request. This button is available only when the file has been sent and isn't yet signed.
When you click the button, it opens the **Recall Document** dialog box, in which you can enter the reason and confirm that you want to recall the document. After you recall the document, the signing status changes to *Canceled/Declined* (for Adobe Acrobat Sign) or *Voided* (for DocuSign).
- **Remind Recipient:** Sends a reminder email to the recipients while the document is awaiting signing.
- **View Document:** Opens the provider's webpage for the file.
- **Check Status:** Sends an API request to update the signing status of the selected file.
- **Delete:** Deletes the esignature request.

Checking the Signing Status

To check the current status of an electronic document, you click the link in the **eSign Status** column for the document's line on the *Manage eSign Documents (ES401000)* form. On the *eSign Request (ES303000)* form, which opens, you can view:

- The **eSign Status** value in the Summary area
- The recipients and their current statuses in the table

Manage eSign Documents

Owner: EP00000002 - Maxwell Baker

Buttons: Recall Document, Remind Recipient, View Document, Check Status

Name	Subject	Owner	Provider	eSign Status	Recall Reason
Purchase Orders (RO PO002763)Purchase Order PO002763.pdf	Purchase of injection molding machine	Maxwell Baker	DocuSign™	Completed	
Sales Orders (QT QT001067)Quote QT001067.pdf	Quote to sign	Maxwell Baker	Adobe® Acrobat® Sign	Draft	
Change Orders (000006)Change Order 000006.pdf	[DEMO USE ONLY] Sign the change order	Maxwell Baker	Adobe® Acrobat® Sign	Out For Signature	

Inset: eSign Request

eSign Status: Out For Signature

Email Address	Name	Recipient Status	Delivered On	Signed On	IP Address
	David Chubb	Waiting for My Signature	1/22/2026 10:58 PM		

Figure: Checking the eSign status

Syncing Esignature Requests

On the *eSign Sync (ES501000)* processing form, shown below, you synchronize esignature requests with the connected providers:

- To sync particular requests, you select the requests and click **Sync**.
- To sync all requests, you click **Sync All**.

eSign Sync

Buttons: Sync, Sync All

Name	Subject	Owner	Provider	eSign Status	Status Updated On	eSign Account
Sales Orders (QT QT001067)Quote QT001067.pdf	[DEMO USE ONLY] Quote to sign	Maxwell Baker	Adobe® Acrobat® Sign	Draft	1/22/2026 12:56 AM	ADOBE ACROBAT
Change Orders (000006)Change Order 000006.pdf	[DEMO USE ONLY] Sign the change order	Maxwell Baker	Adobe® Acrobat® Sign	Out For Signature	1/22/2026 11:50 PM	ADOBE ACROBAT
Change Orders (000015)Change Order 000015.pdf	A change order for approval	Maxwell Baker	DocuSign™	Created	1/23/2026 5:14 AM	DOCUSIGN
Projects (P CSTRHOTEL)\CSTRHOTEL_Architec...	Design approval schedule	Maxwell Baker	DocuSign™	Created	1/23/2026 5:29 AM	DOCUSIGN

Figure: The eSign Sync form

During synchronization, the system shows progress and results in the **Processing** dialog box.

You can schedule regular synchronization of esignature requests. Thus, request statuses—such as *Out for eSignature*, *Completed*, *Declined*, *Voided*, or *Expired*—stay up to date. This also ensures that signed electronic documents are uploaded to the system and attached to the originating records in a timely manner.

Managing Access Rights

To give a user full access to the electronic signing functionality, you assign the new *eSign* role on the [User Roles \(SM201005\)](#) form.

By default, users with the following roles have the *Delete* access level to the new *Manage eSign Documents (ES401000)* and *eSign Sync (ES501000)* forms:

- *System Administrator*
- *Acumatica Support*

Upgrade Notes

During the upgrade to 2026 R1, if you used eSign integration through the legacy customization project in Acumatica ERP:

- The existing signing account records are automatically moved from the *eSign Accounts (ES301000)* custom form to the new *eSign Accounts (ES301000)* form.
- Previously created esignature requests and recipients remain in your system.
- For the DocuSign provider, the account is disconnected during the upgrade. After the upgrade, you need to update the connection.

Key Capabilities

- Configure esignatures with fully supported DocuSign and Adobe Acrobat Sign integration
- Send documents for electronic signing and track the signing status directly in Acumatica ERP
- Manage and synchronize esignature requests so that signed documents are attached to their originating records

Integrations: Synchronizing with Exchange Server via Microsoft Graph

Starting in Acumatica ERP 2026 R1, you can integrate with Microsoft Exchange Server using the Microsoft Graph API, which replaces the deprecated Exchange Web Services API. You can synchronize emails, contacts, events, and tasks between Acumatica ERP and Microsoft Exchange Server.



This functionality is available only if the *Exchange Integration* and *Scheduled Processing* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

Replacement for the Exchange Web Services API

In previous versions, Acumatica ERP connected to Microsoft Exchange Server using the Exchange Web Services (EWS) API. Microsoft plans to retire Exchange Web Services on October 1, 2026. We recommend using the Microsoft Graph API to integrate Acumatica ERP 2026 R1 with Exchange Server.

Connecting to an Exchange Server via Microsoft Graph

To set up a connection with an Exchange server using the Microsoft Graph API, use the [Exchange Integration Configuration](#) (SM204015) form. On the form, you select the *Microsoft Graph (Microsoft 365)* option in the **Web Services** box. Then you configure a connector of the *Microsoft Graph* type on the [External Applications](#) (SM301000) form and specify the connector in the **External Application** box on the [Exchange Integration Configuration](#) form.

Figure: Configuring integration via Microsoft Graph API

While you configure the connector, you need to register the connector in the [Microsoft Azure Portal](#) to obtain the needed settings for the connector. For details on registering the connection in the Microsoft Azure Portal, see [To Create a System Email Account for Office 365 with OAuth 2.0](#).

Learn More

Expand your knowledge by reading the following topics: [Synchronizing Acumatica ERP with Microsoft Exchange Server](#)

Inventory and Order Management: Approvals for Inventory Adjustments

Acumatica ERP 2026 R1 adds inventory adjustments to the existing approval workflow to help you strengthen control over these transactions. Now you can make sure that the right person has reviewed and approved an adjustment before its release. With this capability, you reduce the risk of errors and uncontrolled write-offs. Approvals apply to both system-generated adjustments and adjustments created by a user.



This functionality is available only if the *Approval Workflow* and *Inventory* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

The following sections describe how inventory adjustment approvals work.

Creating an Approval Map

First, you create an approval map on the [Approval Maps](#) (EP205015) form. You select the new *Adjustments* entity type so that the map can apply to approvals of inventory adjustments.

The screenshot shows the 'Approval Maps' form for 'Adjustments_Amount - Adjustments'. The 'Entity Type' is set to 'Adjustments'. Under 'Steps and Rules', there is a rule configuration table with the following data:

Active	Brackets	*Entity	*Field Name	*Condition	Value
<input checked="" type="checkbox"/>	-	Adjustment	Total Amount	Is Greater Than	100.00

Figure: The entity type of the approval map

You specify approval rules, steps, and conditions as you do for other records that use approvals. For details, see [Approval Configuration: Approval Maps](#).

Specifying Approval Settings in the Inventory Preferences

Once you create an approval map, you need to make sure it's applied to adjustments. On the new **Approval** tab of the [Inventory Preferences](#) (IN101000) form, do the following:

1. Select the created map in the **Approval Map** column (Item 1 below).
2. Optional: Select a notification template (Item 2) in the **Pending Approval Notification** column. The system will use this notification template to let the responsible person know about new transactions to approve.



Repeat these instructions for each approval map you want to use. You can add any number of maps.

Inventory Preferences ☆

GENERAL MAILING & PRINTING WAREHOUSE MANAGEMENT GS1 UNITS **APPROVAL**

Active Document Type

* Approval Map Pending Approval Notification

Adjustment Adjustments_Amount Adjustment Violation

Adjustment Inventory Adjustments

Figure: Approval maps in the inventory preferences

How Adjustment Approvals Work

After at least one active approval map has been added to the **Approvals** tab of the *Inventory Preferences* (IN101000) form, all manually created adjustments on the *Adjustments* (IN303000) form are initially assigned the *On Hold* status. When you remove an adjustment from hold, the system determines whether approval is required. If the adjustment must be approved before it can be released, the system assigns the *Pending Approval* status (Item 1 below) to it.

If a system-generated adjustment is subject to approval, the system creates it with the *Pending Approval* status. If this adjustment doesn't meet the criteria of the approval map, the system changes its status based on the standard workflow without approvals.

For an adjustment that's pending approval, on the new **Approvals** tab of the *Adjustments* form, the system shows a warning (Item 2), as well as the name of each employee who must perform the approval (Item 3). The employee can approve, reject, or reassign the adjustment by clicking the appropriate command on the form toolbar or the More menu.

Adjustments 000004

Note Activities Files

Approve Reject Hold ...

Reference Nbr. 000004 External Ref.

Status Pending Approval 1 Description

Date 1/15/2026

Post Period 01-2026

Total Qty. 150.00

Total Cost 343.50

DETAILS FINANCIAL **APPROVALS** 2

Assignee Assignee Name Workgroup Reviewer Reviewer Name Date Decision Reason Obsolete

EP00000026 Kimberly Gibbs 3 Pending ⚠

Figure: An adjustment pending approval

Processing Multiple Adjustments

To process multiple approvals for adjustments, you open the *Approvals* (EP503010) form. On this form, you can select multiple records with the *IN Adjustment* type and process them simultaneously.

Inventory and Order Management: Automated Paperwork at the Shipping Desk

Automated paperwork at the shipping desk—such as shipping labels, shipment confirmations, and commercial invoices—is essential for increasing operational efficiency, minimizing manual errors, and accelerating order processing. In Acumatica ERP 2026 R1, you can improve the workflow at the shipping desk by turning on the automatic printing of shipping paperwork. With this functionality turned on, the needed documents can be automatically printed when you confirm a shipment on the [Shipments](#) (SO302000) form.



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

Essential Highlights

The automated workflow for shipping paperwork on both the [Shipments](#) (SO302000) form and the [Pick, Pack, and Ship](#) (SO302020) form provides a consistent experience and reduces training requirements across different system configurations. Additional benefits include:

- **Increased Efficiency:** With fewer manual clicks required, you can handle more shipments in less time.
- **Reduced Errors:** You can rely on the system to print the right documents for every shipment.
- **Better User Experience:** The one-click process for generating all required shipping documents helps you move through your shipping tasks with less effort.
- **Flexibility:** You can configure the printing process to fit your operational needs and preferences.

Configuring DeviceHub

If you already use DeviceHub to print shipping documents on the [Pick, Pack, and Ship](#) (SO302020) form, you may already have your settings configured. The new capability uses prints these shipping documents via DeviceHub too. However, before you configure the automated shipping paperwork, verify the following:

1. DeviceHub is installed and the required printers are set up. For more details, see [Getting Started with DeviceHub](#).
2. A default DeviceHub printer is specified in one of the following locations:
 - The **Printing Settings** tab of the [User Profile](#) (SM203010) form for each user who will print shipping documents
 - The **Mailing & Printing** tab of the [Sales Orders Preferences](#) (SO101000) form
 - The **Branch Details** tab of the [Branches](#) (CS102000) form
 - The **Company Details** tab of [Companies](#) (CS101500) form

Configuring Automated Shipping Paperwork

To turn on the printing of shipping documents, select the following check boxes on the [Sales Orders Preferences](#) (SO101000) form:

- **Print Shipment Confirmation Automatically**
- **Print Shipment Labels Automatically**
- **Print Commercial Invoices Automatically**

The location of these check boxes depends on the state of the **Fulfillment** check box on the [Enable/Disable Features](#) (CS100000) form:

- Selected: The check boxes appear in the **Fulfillment Settings** section of the **Warehouse Management** tab.
- Cleared: The check boxes appear in the **Shipment Settings** section of the **General** tab (shown below).

Sales Orders Preferences

ViewApprovalMap ViewInvoiceApprovalMap

GENERAL APPROVAL MAILING & PRINTING

Data Entry Settings ▾
Shipment Numbering Sequence * SOSHIPMENT - SO Shipment

Posting Settings
 Automatically Release IN Documents

Price Settings ▾

Shipment Settings
Free Item Shipping * Proportional

Hold Shipments on Entry
 Validate Shipment Total on Confirmation
 Add Zero Lines for Items Not in Stock
 Create Zero Shipments
 Print Shipment Confirmation Automatically
 Print Shipment Labels Automatically
 Print Commercial Invoices Automatically

Freight Calculation Settings
Freight Allocation on Partial Shipping Full Amount First Time

Sales Profitability Settings
Cost Calculation Basis for Non-Stock ... Non-Stock Kit Standard Cost Plus Stock Compones

Intercompany Order Settings
Default Type for Intercompany Sales * SO - Sales Order
Default Type for Intercompany Retu... * RC - Return for Credit
 Disable Adding Items to Orders
 Disable Editing Prices and Discounts

Invoice Settings ▾

Related Case Settings
Default Return Order Type RM - RMA Order

Figure: Location of settings with the Fulfillment check box cleared

Inventory and Order Management: Automated Receiving with Recommended Putaway Locations

The previous update of Acumatica ERP introduced a smarter and easier way to manage warehouse distribution through its directed putaway process. Version 2026 R1 builds on those improvements to further optimize and simplify the simultaneous automated receiving and putaway of goods. This enhancement will be particularly useful for warehouse workers in companies that don't use a single staging location before putting goods away.

Here's what you'll need to know about the new capability to make the most of it.

Configuring Recommendations for Automated Receiving

To help warehouse workers take advantage of putaway recommendations during receiving, you need to do the following:

- On the **Warehouse Management** tab of the [Purchase Orders Preferences](#) (PO101000) form, select the **Request Location for Each Item on Receiving** check box and clear the following check boxes:
 - **Use Single Receiving Location**
 - **Use Default Receiving Location**
- For each stock item you want to put away on receipt, specify a location in the **Default Putaway To** box (**General** tab) of the [Item Warehouse Details](#) (IN204500) form.



Alternatively, you can specify this location for the default warehouse in the stock item's settings on the [Stock Items](#) (IN202500) form.

- If you also receive and put away non-stock items, specify a location in the **Non-Stock Location** box (**Default Locations** tab) of the [Warehouses](#) (IN204000) form.

Receiving Items with Putaway Recommendations

Once the configuration is complete, a warehouse worker will see a recommended location when they receive items with the updated settings. The recommendation appears as a system prompt in Receive mode on the *Receive and Put Away* screen (shown below) when the worker scans the item's barcode.

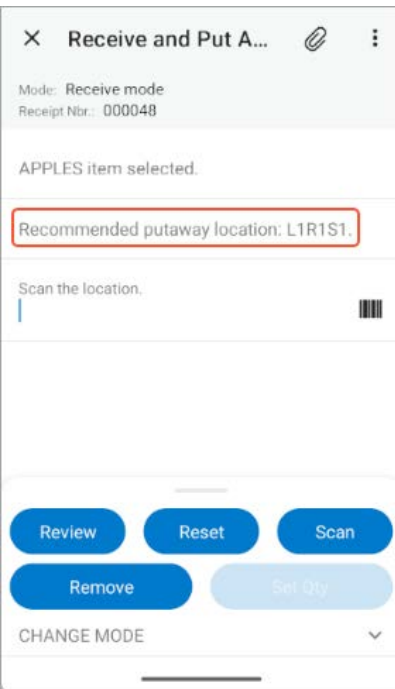


Figure: Putaway recommendation

The warehouse worker can scan the recommended location if they're going to put the item away immediately; they can scan a different one if they want to receive the item in the staging area or another temporary location.

Inventory and Order Management: Automatic Generation of Lot and Serial Numbers

Recyclers often receive items that were never purchased, such as used ink cartridges or recovered electronic parts. Lot and serial numbers provide the traceability required for these items. If you're a warehouse worker, you need a way to assign lot and serial numbers without slowing down the receiving process.

To help you take advantage of auto-generated lot and serial numbers, Acumatica ERP 2026 R1 introduces the ability to generate them automatically on the [Scan and Receive](#) (IN301020) form.



This functionality is available only if the *Inventory Operations* and *Lot and Serial Tracking* features are enabled on the [Enable/Disable Features](#) (CS100000) form.

Configuring the Automatic Generation of Lot and Serial Numbers

To make the system automatically generate a lot or serial number when you scan a new item on the [Scan and Receive](#) (IN301020) form, do the following:

1. On the **Warehouse Management** tab of the [Inventory Preferences](#) (IN101000) form, select the new **Use Default Auto-Generated Lot/Serial Nbr. in Receipts** check box.

The screenshot shows the 'Inventory Preferences' form with the 'WAREHOUSE MANAGEMENT' tab selected. The 'Receipt Settings' section contains the following options:

- Use Default Quantity in Receipts
- Use Default Reason Code in Receipts
- Use Default Auto-Generated Lot/Serial Nbr. in Receipts
- Request Location for Each Item in Receipts

The 'Transfer Settings' section contains the following options:

- Use Default Quantity in Transfers
- Use Default Reason Code in Transfers
- Use Default Lot/Serial Nbr. in Transfers
- Request Location for Each Item in Transfers

The 'PI Count Settings' section contains the following option:

- Use Default Quantity in PI Counts

Figure: The new check box

2. On the [Lot/Serial Classes](#) (IN207000) form, make sure that the lot or serial class of the received item has the following settings:
 - **Assignment Method:** *When Received*
 - **Auto-Generate Next Number:** Selected

Inventory and Order Management: Batch Pick Lists with Shortages

In a busy warehouse, stock levels can change faster than pick lists do, so you might not be able to pick from an alternate location. When a shortage occurs, you still need to keep the batch moving—confirm what you've actually picked, complete the worksheet, and quickly identify which shipments need attention before packing and shipping.

In Acumatica ERP 2026 R1, you can confirm short quantities—that is, picked quantities that are less than required—and continue picking the batch without stopping the process.



Batch picking is available only if the *Advanced Picking* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Picking Short Quantities in a Batch

You can confirm a short quantity for a shipment in a batch if the *Allow with Warning* option is selected in the **Short Shipment Confirmation** box on the [Sales Orders Preferences](#) (SO101000) form. Short picking on the [Pick, Pack, and Ship](#) form is supported for batch pick lists in paper-based and paperless picking.

When you confirm a batch pick list with a short quantity, the system automatically distributes the picked quantities across the shipments included in the worksheet. The inventory transfer to the sorting location includes only the picked quantities.

To help you catch exceptions before packing and shipping, the system now shows whether a shipment is affected by shipment rules when a shortage exists. On the **Shipments** tab of the [Picking Worksheets](#) (SO302500) form, the system selects the new **Non-Shippable** check box (shown below) for picked shipments with issues. You can use this check box to quickly identify shipments that cannot be packed or shipped right now.

The screenshot shows the 'Picking Worksheets' form for '000001 - Wholesale Warehouse'. The 'SHIPMENTS' tab is active, displaying a table of shipment details. A red box highlights the 'Non-Shippable' checkbox in the first column of the table, which is currently unchecked for all rows.

Picked	Non-Shippable	Shipment Nbr.	Type	Picked Qty.	Shipped Quantity	Shipped Weight	Shipped Volume	Status	Unlinked
<input checked="" type="checkbox"/>	<input type="checkbox"/>	000062	Shipment	15.00	15.00	33.250000	28.400000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	000063	Shipment	5.00	15.00	29.500000	28.400000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	000064	Shipment	30.00	30.00	47.800000	28.400000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	000065	Shipment	15.00	15.00	14.550000	0.000000	Open	<input type="checkbox"/>

Figure: The Non-Shippable check box

Inventory and Order Management: Branch-Specific Requisitions with Multiple Base Currencies

Starting in Acumatica ERP 2026 R1, you can use purchase requests and requisitions in tenants whose companies use different base currencies. Each request and requisition is created for a specific originating branch, and related documents and warehouses must use that branch's base currency.



This functionality is available only if both the *Purchase Requisitions* feature and the *Multiple Base Currencies* feature are enabled on the [Enable/Disable Features](#) (CS100000) form. In earlier versions, these features couldn't be used together.

What's New in Purchase Requests and Requisitions

This update introduces the following improvements in purchase requests and requisitions:

- **Enhanced control over branch consistency:** With the *Multibranch Support* or *Multicompany Support* feature enabled, you can select the originating branch when you create a purchase request or requisition. When you generate purchase and sales orders for the requisition, the system copies its branch to the generated documents. This ensures consistent expense distribution.
- **Restricted customer and vendor usage:** With the *Customer and Vendor Visibility Restriction* feature enabled, you can control which customers and vendors are available for selection in purchase requests and requisitions based on the document's branch or company.
- **Base currency verification:** If the *Multiple Base Currencies* feature is enabled, the requisition's branch and the warehouse branch in each requisition line must have the same base currency.
- **Company- or branch-specific budgets:** Now you can validate each purchase request against the budget of the originating branch or company. On top of that, you can assign a separate budget ledger to each company.

The next several sections describe how these improvements affect the workflow of purchase requests and requisitions.

About the Multiple Base Currencies Feature

The *Multiple Base Currencies* feature is designed to provide expanded functionality for organizations that do business in more than one country. With this feature enabled on the [Enable/Disable Features](#) (CS100000) form, a single tenant can include multiple companies or branches, each using its own base currency in financial transactions.

For more information about multiple base currencies in a single tenant, see [Multiple Base Currencies: General Information](#).

Creating a Request

In a new purchase request on the [Requests](#) (RQ301000) form, the following behavior applies when the corresponding feature is enabled on the [Enable/Disable Features](#) (CS100000) form:

- *Multibranch Support* or *Multicompany Support*: The system automatically inserts the current branch into the new **Branch** box (shown below) on the **Other** tab. You can change this branch while the request has the *On Hold* status.
- *Customer and Vendor Visibility Restriction*: A customer or vendor is available for selection if the **Restrict Visibility To** box on the **Financial** tab of the [Customers](#) (AR303000) or [Vendors](#) (AP303000) form is empty or contains the branch specified in this document (or this branch's company or company group).

- *Multiple Base Currencies:* The base currency of the request is copied from its branch. The base currency of the request's branch, vendors, and customer must match.

The screenshot displays the 'Requests' interface for a specific requisition. The top section shows the request details: Ref. Nbr. 0000001, Request Class * CUSTOMER, Status On Hold, Date * 1/21/2026, Priority Normal, Requested By * COFFEESHOP - FourStar Coffee & Sweets Shop, Location * MAIN - Primary Location, Currency USD, and Description. A 'Remove Hold' button is present. The 'OTHER' tab is active, showing 'Ownership' and 'Request Info' sections. The 'Request Info' section has a 'Branch *' field with the value 'HEADOFFICE - SweetLif...' highlighted by a red box.

Figure: The Branch box

Creating a Requisition

In a new purchase requisition on the [Requisitions](#) (RQ302000) form, the following behavior applies when the corresponding feature is enabled on the [Enable/Disable Features](#) (CS100000) form:

- *Multibranch Support or Multicompany Support:* When you create a new requisition, the system inserts the current branch into the new **Branch** box (shown below) on the **Other** tab. You can change this branch while the requisition has the *On Hold* status.
- *Customer and Vendor Visibility Restriction:* A customer or vendor is available for selection if the **Restrict Visibility To** box on the **Financial** tab of the [Customers](#) (AR303000) or [Vendors](#) (AP303000) form is empty or contains the branch specified in this document (or the branch's company or company group).
- *Multiple Base Currencies:* The following rules apply:
 - The base currency of the requisition's branch must match the base currency of the originating request.
 - The base currency of the warehouse in requisition lines can't differ from the base currency of the requisition's branch.

Requisitions
0000005 - Kimberly Gibbs

Ref. Nbr. 0000005
Status On Hold
Date * 1/22/2026
Priority Normal
 Quoted

Creator * EP00000026 - Kimberly Gibbs
Customer COFFEESHOP - FourStar Coffee & ...
Location MAIN - Primary Location
Currency USD 1 View Base
Description

Est. Ext. Cost 163.87

DETAILS SHIPPING BIDDING VENDOR INFO APPROVALS OTHER PURCHASE ORDERS SALES ORDERS

Ownership
Workgroup
Owner

Requisition Info
Branch * HEADOFFICE - SweetLif...

Figure: The Branch box

When you add request lines by clicking **Add Requested Items** on the **Details** tab, you can use the following new settings in the **Select Requested Items** dialog box:

- The **Branch** box (Item 1 below) in the Summary area. If you select a branch, the table shows only request lines that have the same branch.

If the *Multiple Base Currencies* feature is enabled on the *Enable/Disable Features* form, you can select only branches with the same base currency as that of the requisition's branch. If the box is empty, the table shows only items from requests whose branch has the same base currency as the branch of the requisition.

- The **Branch** and **Branch Name** columns (Item 2) in the table, which display the originating branch of each request.

Select Requested Items

Branch HEADOFFICE - SweetLife Head Office and Wholesale C...
Assigned To Kimberly Gibbs Me
Workgroup My
 Display Escalated
 Merge Lines
Inventory ID

Request Class
Priority All
Requested By
Department
Vendor
Description

Search

<input type="checkbox"/>	Branch	Branch Name	Priority	Request Class	Ref. Nbr.	Requested By	Inventory ID	Description
<input checked="" type="checkbox"/>	HEADOFFICE	SweetLife Head Office and Wh...	Normal	CUSTOMER	0000002	COFFEESHOP	APJAM96	Apple jam 96 oz
<input type="checkbox"/>	HEADOFFICE	SweetLife Head Office and Wh...	Normal	CUSTOMER	0000002	COFFEESHOP	BANJAM96	Banana jam 96 oz

Save Cancel

Figure: The Select Requested Items dialog box

Creating Orders for a Requisition

On the *Create Orders* (RQ505000) form, you can use the new optional **Branch** box (Item 1 below) in the Selection area to narrow down the list of requisitions by branch. The new **Branch** and **Branch Name** columns of the table display branch information; these columns are hidden by default.

For each requisition, the system creates purchase and sales orders in the source branch of that requisition.

Branch: HEADOFFICE - SweetLife H...
 Action: Create Orders
 Assigned To: Kimberly Gibbs [Me]
 Workgroup: [My]
 Priority: All
 Creator: [Search]
 Vendor: [Search]
 Description: [Search]

Branch	Branch Name	Priority	Ref. Nbr.	Date	Status	Creator	Vendor
HEADOFFICE	SweetLife Head Office and Wh...	Normal	0000006	1/22/2026	Open	EP00000026	ALLFRUITS

Figure: The Create Orders form

Mass-Creating Requisitions

On the [Create Requisitions](#) (RQ504000) form, the following behavior applies when the corresponding feature is enabled on the [Enable/Disable Features](#) (CS100000) form:

- **Multibranch Support** or **Multicompany Support**: The **Branch** and **Branch Name** columns (Item 1 below) show the branch of the request and its name. These columns are hidden by default.
- **Multiple Base Currencies**: In the new **Creation Branch** box (Item 2), you can select the target branch of the new requisition. When you select a branch, the table contains only request lines whose requests have the same base currency as that of the selected branch.

Creation Branch *: HEADOFFICE - SweetLife Head Offic...
 Assigned To: Kimberly Gibbs [Me]
 Workgroup: [My]
 Priority: All [Merge Lines]
 Request Class: [Search]
 Department: [Search]
 Requested By: [Search]
 Location: [Search]

Branch	Branch Name	Priority	Ref. Nbr.	Requested By	Date	Shipping Destination Type	Inventory ID	Description
HEADOFFICE	SweetLife Head Office and Wh...	Normal	0000001	COFFEESHOP	1/21/2026	Customer	TANGERINES	Fresh tangerines 1 lb
HEADOFFICE	SweetLife Head Office and Wh...	Normal	0000001	COFFEESHOP	1/21/2026	Customer	LEMONS	Fresh lemons 1 lb

Figure: New settings of the mass-processing form

Specifying Budget Ledgers for Companies

On the new **Budget** tab of the [Purchase Requisitions Preferences](#) (RQ101000) form, you can assign a separate budget ledger to each company in the tenant as follows:

1. In the table, add a row for each company (Item 1 below) to which you want to assign a budget ledger. This table replaces the **Budget Ledger** box previously located on the **General** tab of the form.
2. In the **Ledger ID** column (Item 2), specify the budget ledger that will be used for the company. A single budget ledger can be used in multiple companies.
3. In the new **Validate By** box (Item 3), select what the system uses to validate purchase requests against budgets. You can select one of the following options:

- *Budget Ledger*: The system validates requests from all companies with the same budget ledger against a single combined budget. In previous versions of the application, the system used this option only.
 - *Branch*: The system validates requests against the budget of the originating branch.
 - *Company*: The system validates requests against the budget of the company to which the originating branch belongs.
4. In the **Budget Calculation** box (Item 4), select the time interval for calculating request amounts. This box was previously located on the **General** tab and functions as it did before.

Purchase Requisitions Preferences ⚙️

GENERAL **BUDGET** APPROVAL MAILING & PRINTING

Budget Calculation 4

Validate By 3

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* Company	Company Name	Base Currency	* Ledger ID	Ledger Name
MUFFINS	Muffins & Cakes	USD	BUDGETM	Budget Ledger for Muffins & Ca...
SWEETLIFE	SweetLife Fruits & Jams	USD	BUDGET	Budget Ledger
TOADGREEN	ToadGreen Building Group	USD	BUDGET	Budget Ledger

Figure: The Budget tab

Changes to Reports

If the *Multibranch Support* or *Multicompany Support* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, the **Company/Branch** box appears on the following report and inquiry forms:

- The *Requests* (RQ401000) inquiry form
- The *Request Details* (RQ613000) report form
- The *Requisition Details* (RQ612000) report form

Upgrade Notes

When you upgrade to Acumatica ERP 2026 R1, the existing validation behavior remains as it was before the upgrade. No action is required unless you want to modify the validation settings.

Inventory and Order Management: Changes to Processing of Vendor Bills

In Acumatica ERP 2026 R1, AP clerks and inventory managers gain a more flexible process for handling vendor bills. The update introduces the ability to select the type of the purchase document the system links to a recognized AP bill. The new ability makes it easier to process documents in nonstandard vendor scenarios without running into system limitations. Additionally, users will have less room for unintended errors in bill reversal, which helps keep inventory costs and vendor balances accurate.



Recognition of billing documents is available only if the *AP Document Recognition Service* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Let's walk through what's changed.

Improved Recognition of AP Bills

When you recognize an AP bill on the [Incoming Documents](#) (AP301100) form, you need to link it to a purchase document in the **Link Line** dialog box. In previous versions of Acumatica ERP, the type of suggested documents in this dialog box depended solely on the settings of the bill's vendor. The system used the state of the **Allow AP Bill Before Receipt** check box on the [Vendors](#) (AP303000) form to determine this type:

- **Selected:** Purchase order
- **Cleared:** Purchase receipt

This behavior could cause inconvenience if you had to link the bill to another type of document. For example, if you recognized a bill with a service line and the **Allow AP Bill Before Receipt** check box was cleared, you couldn't link the bill because the purchase receipt did not contain this line.

Now you can override the state of this check box in the new **Selected Mode** box (shown below) of the **Link Line** dialog box.

Selected	Order Nbr.	Order Type	Receipt Nbr.	ProjectID	TaskID	CostCodeID	Vendor Ref.
<input checked="" type="checkbox"/>	000060	Normal	000050	0			

Figure: The Selected Mode option button

The default option in this box depends on the state of the **Allow AP Bill Before Receipt** check box for the vendor on the [Vendors](#) form:

- Selected: The system selects *Purchase Order* for all stock and non-stock items.
- Cleared: The system selects *Purchase Receipt* for the following items:
 - Stock items
 - Non-stock items that have the **Require Receipt** check box selected on the [Non-Stock Items](#) (IN202000) form.
 - Non-stock items with the cleared **Require Receipt** check box on the [Non-Stock Items](#) form if one of the following check boxes is selected on the [Inventory Preferences](#) (IN101000) form:
 - **Process Service Lines from Normal Purchase Orders via Purchase Receipts**
 - **Process Service Lines from Drop-Ship Purchase Orders via Purchase Receipts**

For items with different settings, the system selects *Purchase Order*.

Restrictions in Reversal Debit Adjustment

The protection from unintended errors has been reinforced on the [Bills and Adjustments](#) (AR301000) form. If you create a reversal debit adjustment for an AP bill linked to a purchase order, purchase receipt, or subcontract, you won't be able to change the following values of the adjustment:

- Values of any column in lines with stock items and non-stock items that require a purchase receipt
- The values in the **Project** and **Project Task** columns in lines with non-stock items that don't require a receipt

This change benefits inventory and AP managers by reducing the following risks:

- Incorrect reversal amounts of taxes and purchase price variances (PPV)
- Posting of the reversed amounts to a wrong account

Learn More

For more information about document recognition, see [AP Documents from PDFs: General Information](#).

Inventory and Order Management: Changing Picking Locations on the Fly

When warehouse staff pick items from a shipment in Acumatica ERP, they may find that the full item quantity isn't available in the specified location. Maybe some units are damaged or missing, or perhaps the units in the location don't have the expected lot or serial numbers. Until now, the picker couldn't pick the remaining quantity from another location without stopping to ask a manager to update the shipment's details.

In Version 2026 R1, location-level shortages no longer create roadblocks when you use paper pick lists. Pickers can now change the location of unpicked quantity in a shipment directly from the *Pick, Pack, and Ship* screen of the mobile app. This means that they can immediately switch to another available location and keep the process moving—without waiting for a manager to update the shipment manually.



This functionality is not available for pick lists generated by using the *Paperless Picking* feature.

Curious about how to change a location? Let's take a closer look.

Updating Picking Settings

Before warehouse staff can use the new functionality, make sure that the new **Allow Picking Location Changes** check box (shown below) is selected on the **Warehouse Management** tab of the [Sales Orders Preferences](#) (SO101000) form. By default, this check box is selected during the upgrade to Version 2026 R1.

Sales Orders Preferences ⚙️

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GENERAL APPROVAL **WAREHOUSE MANAGEMENT** ...

i These settings are specific to the current branch.

Fulfillment Workflow ▾

Fulfillment Settings

Short Shipment Confirmation Forbid ▾

Order Shipment Lines by Location's Pick Priority ▾

- Use Default Quantity
- Use Packed Quantity as Shipped Quantity
- Use Explicit Line Confirmation
- Use Default Location
- Confirm Weight for Each Package
- Confirm Dimensions for Packages with E...
- Request Location for Each Item
- Confirm Tote Selection on Wave Picking
- Add Totes to Shipments on the Fly
- Print Packing Slips with Pick Lists
- Allow Bidirectional Pick Lists
- Allow Picking Location Changes

Figure: The Allow Picking Location Changes check box

Changing Locations in Shipment Lines

On the [Pick, Pack, and Ship](#) screen, a picker starts by scanning a shipment or pick list number. Once the document is loaded (Item 1 below), the picker taps **Review** (Item 2) to review its details.

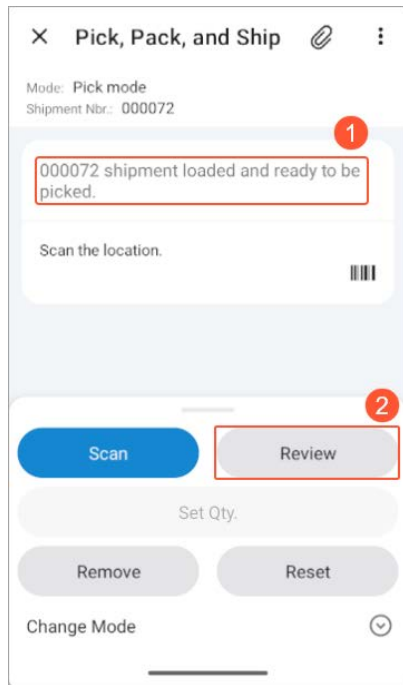


Figure: The Review button

Suppose that a picker has picked 40 pounds of apples and discovers that 10 remaining pounds are missing. When they tap **Review**, the system opens the shipment-level *Review* screen, which lists items and their picked quantity (Item 1) and overall quantity (Item 2).

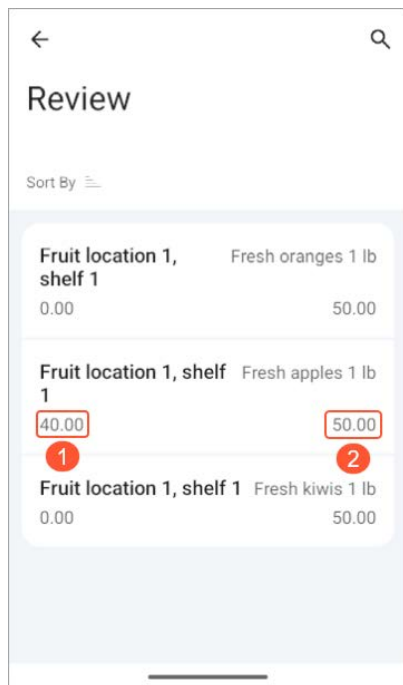


Figure: The Review screen for the shipment

The picker taps the line with the stock item whose location needs to be changed. The line-level *Review* screen opens with detailed information about the selected line.

On this screen, the picker reviews the item's picked and overall quantities (Item 1 below). On the More menu, they tap **Change Location** (Item 2) to open the dialog box.

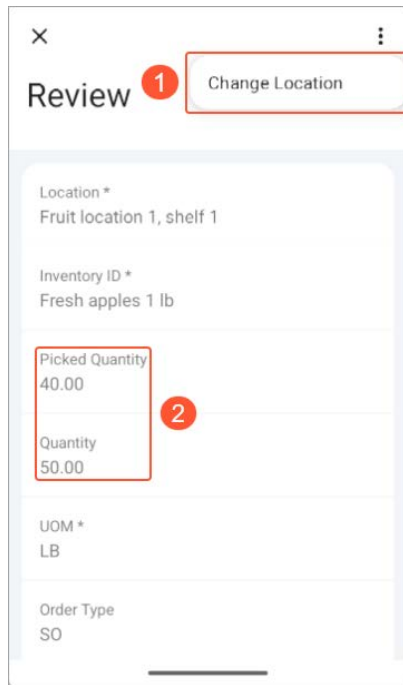


Figure: The Review screen for the line

In the **Change Location** dialog box, the picker reviews the **Remaining Qty.** value (Item 1 below)—the quantity to be picked from another location or other locations. Above this field, locations with shippable quantities are displayed.



For lot- or serial-tracked items, quantities available for shipping are shown as follows:

- If the item's lot number was allocated in a sales order, the system shows available quantities at other locations for only this lot.
- If the item's lot or serial class has the *User-Enterable* issue method, available quantities are shown without lot or serial numbers.

When the picker taps the check box to the left of the location, the system decreases the remaining quantity and increases **Qty. to Pick** (Item 2) for the location. If the available quantity is insufficient, the picker can select another location (and continue until the remaining quantity is 0). Once the remaining quantity is fully distributed, the picker taps **Change** (Item 3).

Change Location

Inventory ID
Fresh apples 1 lb

Sort By

Location	Lot/Serial Number
MAIN	
<input checked="" type="checkbox"/> Available for Shipment	Expiration Date --/------
54.00	
Qty. to Pick 10.00	Expiration Status

Remaining Qty.
0.00 LB

Change

Figure: The Change Location dialog box

The system splits the original line into separate lines—one for each picking location (shown below)—and returns to the shipment-level *Review* screen.

Review

Sort By

Fruit location 1, shelf 1	Fresh oranges 1 lb	0.00	50.00
Main (receiving)	Fresh apples 1 lb	0.00	10.00
Fruit location 1, shelf 1	Fresh kiwis 1 lb	0.00	50.00
Fruit location 1, shelf 1	Fresh apples 1 lb	40.00	40.00

Figure: The item with the changed location

The picker can then return to the *Pick, Pack, and Ship* screen and pick the remaining item quantity from another location.

Tracking Allocations for Updated Lines

As a warehouse manager, you can view location overrides in real time. If a picker changes the initial location and picks items from multiple locations, the system automatically updates the line on the [Shipments](#) (SO302000) form as follows:

- Inserts `<SPLIT>` in the **Location** column on the **General** tab for the updated line (Item 1 below)
- Adds a line split for each location in the **Line Details** dialog box, which opens when you click **Line Details** on the table toolbar (Item 2)

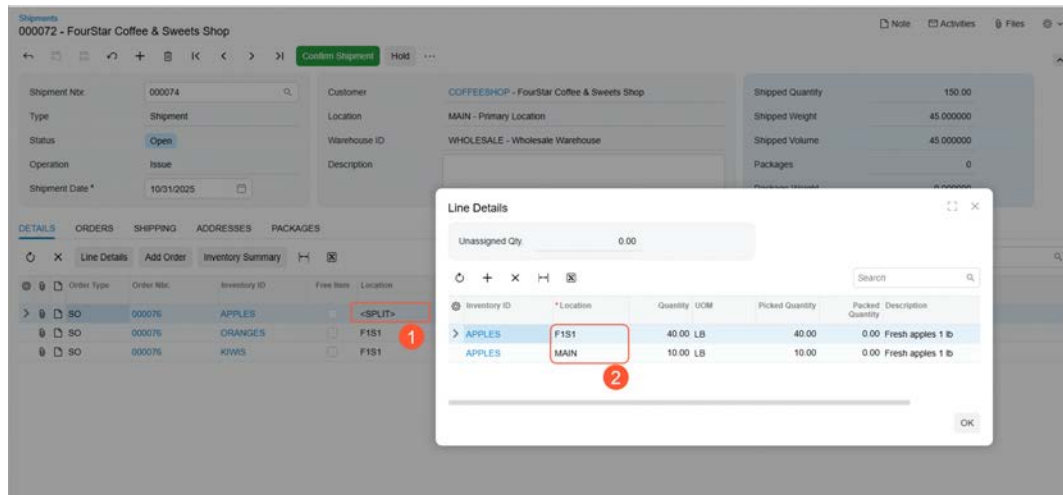


Figure: A shipment line picked from two locations

If the picking location is changed for an item on a *Wave* or *Batch* worksheet, the system adds a row for each new location in the **Pick List** dialog box of the [Picking Worksheets](#) (SO302500) form. The system also temporarily creates an additional *SO Allocated* item plan (a system record that represents a planned allocation of inventory) for the quantity picked from the new location. This item plan exists only during picking and is removed when the shipment is marked as *Picked* in the worksheet. At this point, the original shipment-based item plan is deleted.

Viewing the History of Changes

On the new [History of Picking Location Changes](#) (SO406020) inquiry form, you can view shipments whose locations have been changed by pickers.

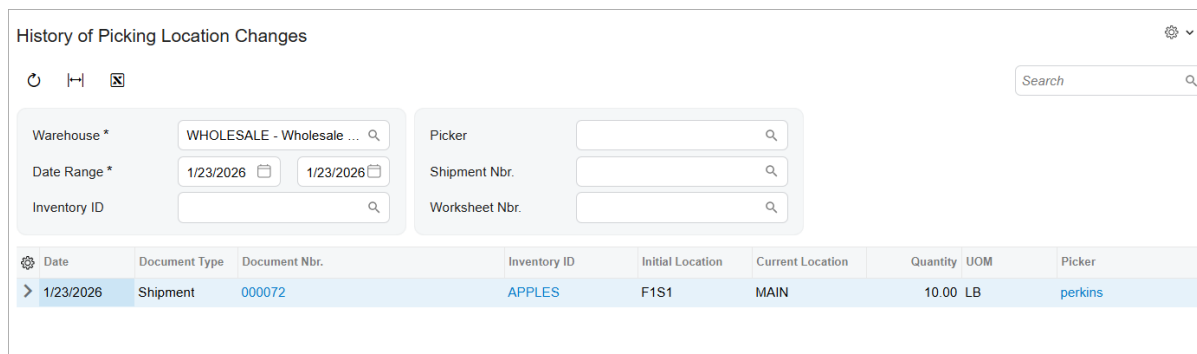


Figure: The History of Location Changes inquiry form

Feature Highlights

- Pickers can now change the assigned picking locations in shipment lines **directly in the mobile app**.
- Warehouse managers can **review the updated locations** on the [Shipments](#) (SO302000) or [Picking Worksheets](#) (SO302500) form.
- Warehouse managers can review all shipments with changed locations **in one place**.

Inventory and Order Management: Default Purchasing Source for Non-Stock Items

In Acumatica ERP 2026 R1, you can assign a default purchasing source to any **non-stock item**. If your team regularly resells non-stock items, such as software licenses, you no longer need to manually select their purchase source in each sales order line—the system will insert each item’s purchasing source automatically.



This functionality is available only if the *Drop Shipments* or *Sales Order to Purchase Order Link* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Specifying the Purchase Source for Non-Stock Items

You can specify the default purchase source for a non-stock item in the new **Source for Sales Order** box (shown below) on the [Non-Stock Items](#) (IN202000) form.

The screenshot shows the 'Non-Stock Items' form for 'LICENCE1YEAR - Basic license for 1 year'. The 'Source for Sales Order' field is highlighted with a red box and set to 'Purchase to Order'. Other fields include 'Inventory ID *' (LICENCE1YEAR), 'Item Status' (Active), 'Description' (Basic license for 1 year), 'Posting Class *' (NONSTOCK - Non-Stock Items), 'Tax Category *' (EXEMPT - Exempt Tax Categ...), 'Require Receipt' (checked), 'Require Shipment' (checked), 'Close PO Line' (By Amount), 'Base Unit *' (ITEM), 'Sales Unit *' (ITEM), and 'Purchase Unit *' (ITEM). The 'Unit of Measure' section also has 'Divisible Unit' checked for all units. The 'Conversion Rules' section is empty.

Figure: The Source for Sales Order box

The selected source also determines whether the system selects the **Mark for PO** check box when you add the item to a sales order line on the [Sales Orders](#) (SO301000) form. The following table shows how each **Source for Sales Order** option affects the settings of a new sales order line.

Option	Mark for PO	PO Source
None	Cleared	Unavailable
Drop-Ship	Selected	Drop-Ship

Option	Mark for PO	PO Source
<i>Purchase to Order</i>	Selected	<i>Purchase to Order</i>

Specifying the Purchase Source at the Template Item Level

The **Source for Sales Order** box has also been added to the *Template Items* (IN203000) form. The box is available only for template items of matrix non-stock items—that is, template items for which the **Stock Item** check box is cleared. The selected option determines the default purchase source for new and updated matrix items.

If needed, you can exclude this setting from being used when the matrix items are created or updated. Do the following:

1. On the **Update Settings** tab, add a row to the **Fields Excluded from Update** table.
2. In the **Table Name** column, select *Inventory Item*.
3. In the **Field Name** column, select *Source for Sales Order*.
4. Make sure that the unlabeled check box is selected in the row.

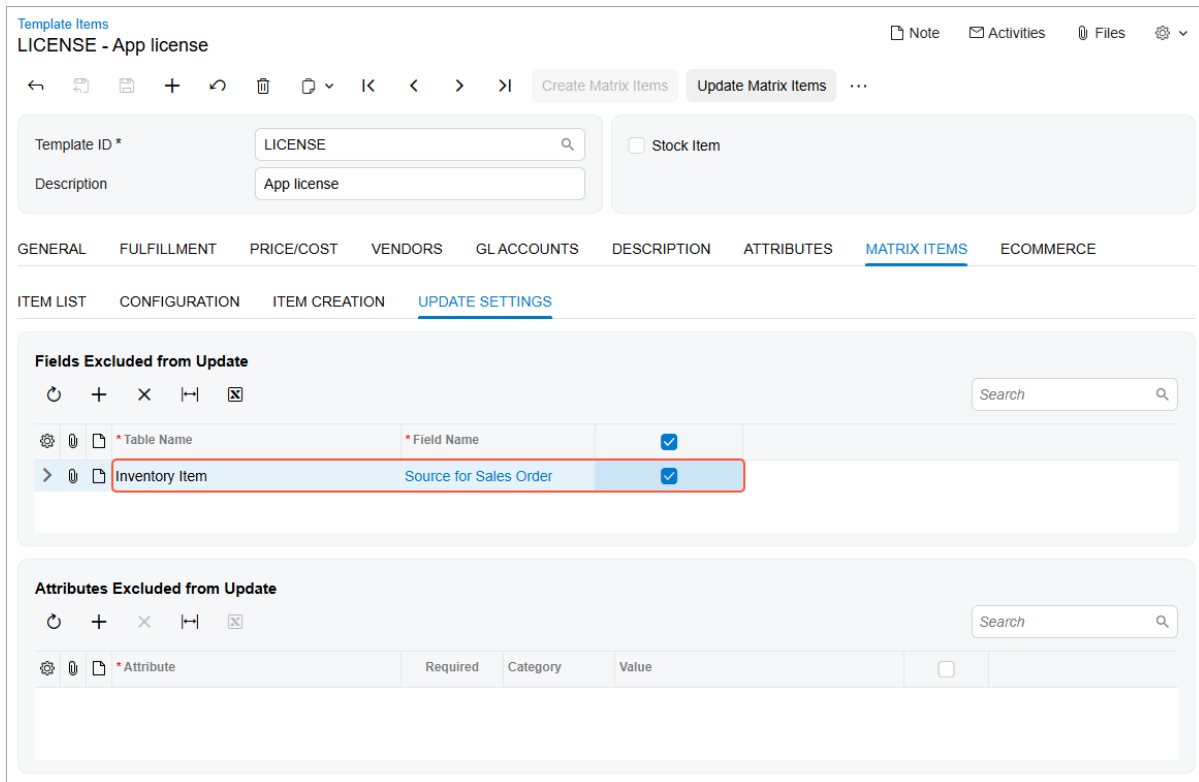


Figure: Exclusion settings

Inventory and Order Management: Enhanced Logic for Sales Workflow

In Acumatica ERP 2026 R1, you don't have to remove a sales invoice from credit hold each time this invoice has an unpaid balance and its credit terms require a prepayment.

Updated Credit Hold Policy for Invoices

The system no longer puts the sales invoice on credit hold each time they have an unpaid balance and credit terms that require a prepayment. However, if you need to validate the unpaid balance of sales invoices, you use the new **Validate Invoices from Orders with 100% Prepayment Required** check box (shown below) on the [Order Types](#) (SO201000) form.

The check box is available for order types with the following configuration:

- **Automation Behavior:** *Sales Order*; **AR Document Type:** *Invoice, Debit Memo, or Cash Sale*
- **Automation Behavior:** *RMA Order*; **Default Operation:** *Issue*; **AR Document Type:** *Invoice or Debit Memo*

The screenshot shows the 'Order Types' configuration form for 'SO - Sales Order'. The 'Accounts Receivable Settings' section is expanded, and the checkbox 'Validate Invoices from Orders with 100% Prepayment Required' is checked and highlighted with a red box. Other visible settings include 'Order Type' set to 'SO', 'Description' as 'Sales Order', 'Order Template' as 'SO - Sales Order', 'Order Numbering Sequence' as 'SOORDER', 'Invoice Numbering Sequence' as 'ARINVOICE', and 'Posting Settings' with 'Combine Sales Sub: From' as 'IIIIIIII', 'Freight Account' as '51300 - COGS - Freight', 'Freight Sub' as '0', and 'Combine Freight Sub: from' as 'LLLLLLLLLL'.

Figure: The new setting

If the new check box is selected, the system validates the settings and unpaid balance of the sales invoice when you do one of the following:

- Generate a sales invoice for this sales order on the [Sales Orders](#) (SO301000) form
- Generate a sales invoice for a shipment based on this sales order on the [Shipments](#) (SO302000) form
- Add this sales order to a sales invoice by clicking **Add Order** on the [Invoices](#) (SO303000) form

The system puts the sales invoice on credit hold if both of the following conditions are met:

- The related sales order has *100* in the **Prepayment Percent** box on the **Financial** tab of the [Sales Orders](#) form.
- The unpaid balance of the sales invoice is greater than *0*. This may occur if freight amounts are added on the [Shipments](#) form or if tax or discount amounts are recalculated on the [Invoices](#) form.

If the check box is cleared, the system does not validate the unpaid balance of sales invoices.

Upgrade Notes

After the upgrade to Acumatica ERP 2026 R1, the system doesn't remove existing sales invoices with the *Credit Hold* status from hold automatically. You must remove these invoice from hold manually on one of the following forms:

- [Invoices](#) (SO303000)
- [Process Invoices and Memos](#) (SO505000)

Inventory and Order Management: Greater Accuracy and Visibility in Inventory Reports

Effective inventory management relies on accurate, easy-to-interpret reporting. In Acumatica ERP 2026 R1, these enhancements help you see the impact of adjustments more clearly and account for in-transit inventory with confidence:

- Adjustment quantities and amounts now appear consistently in historical balances, making it easier to grasp how physical counts and direct adjustments affect the stock level.
- Inventory valuation reports can now include in-transit inventory, so your period-end costs and reconciliations reflect the full picture.

How Adjusted Quantities Are Displayed

In the following reports and inquiry form, you'll see an improved display of quantities and amounts in inventory adjustments with nonzero quantities:

- [Historical Inventory Balance](#) (IN616000) report
- [Historical Inventory Valuation](#) (IN617000) report
- [Inventory Transaction Summary](#) (IN406000) form

In previous versions, adjusted quantities and amounts appeared in different columns depending on the source of the adjustment:

- For adjustments generated from inventory forms:
 - **Receipt** column for positive quantities and amounts
 - **Issue** column for negative quantities and amounts
- For adjustments generated from manufacturing forms, negative quantities appeared in the **Assembly Out** column.

In Version 2026 R1, these quantities and amounts now appear in a single column:

- **Adjusted** in the [Historical Inventory Balance](#) report and on the [Inventory Transaction Summary](#) inquiry form
- **Adjustment** (shown below) in the [Historical Inventory Valuation](#) report

Historical Inventory Valuation												
Company/Branch: HEADOFFICE				Start Period: 11-2025				Date: 11/27/2025 10:28				
User: Kimberly Gibbs				End Period: 11-2025				Page: 1 of 1				
Account	Subaccount										Cost	
12100											0.00	
										Account Beginning Balance:	0.00	
										Subaccount Beginning Balance:	0.00	
Inventory ID	Warehouse	Location		Description								
APPLES	WHOLESALE			Fresh apples 1 lb								0.00
Period	Beg. Cost/Qty.	Receipt	Transfer In	Assembly In	Credit Memo	Adjustment	Transfer Out	Assembly Out	Sale	Issue	End Cost/Qty.	
11-2025	0.00	1,369.42	0.00	0.00	0.00	-68.70	270.22	0.00	845.01	0.00	185.49	
	0.00	598.00	0.00	0.00	0.00	-30.00	118.00	0.00	369.00	0.00	81.00	
										Subaccount Ending Balance:	185.49	
										Account Ending Balance:	185.49	

Figure: The Historical Inventory Valuation report

How In-Transit Quantities Are Shown

Now you can include goods in transit in the [Inventory Valuation](#) (IN615500) and [Historical Inventory Valuation](#) (IN617000) reports. To do this, select the **Include Goods in Transit** check box on the report form and click **Run Report**.

The screenshot shows the 'Historical Inventory Valuation' report configuration interface. At the top, there are icons for edit and refresh, a 'Template' dropdown menu, a green 'Run Report' button, and a menu icon. Below this is a navigation bar with tabs for 'PARAMETERS', 'SORTING & FILTERING', 'MAILING & PRINTING', 'VERSIONS', and 'EMAIL NOTIFICATIONS'. The 'PARAMETERS' tab is active, displaying a form with the following fields:

- Company/Branch: HEADOFFICE (dropdown)
- Format: Summary (dropdown)
- Start Period: 11-2025 (text input with search icon)
- End Period: 11-2025 (text input with search icon)
- Inventory ID: APJAM96 (text input with search icon)

At the bottom of the form, the checkbox 'Include Goods in Transit' is checked and highlighted with a red border.


Figure: The *Include Goods in Transit* check box

The system generates a report that includes detailed information about the in-transit account and subaccount (Item 1 below). You'll find the current quantity and cost of the in-transit stock in the following columns:

- [Inventory Valuation](#): **Qty. on Hand** and **Total Cost**
- [Historical Inventory Valuation](#): **End Cost/Qty.** (Item 2)

Historical Inventory Valuation												
Company/Branch: HEADOFFICE				Start Period: 11-2025				Date: 11/24/2025 10:08				
User: Kimberly Gibbs				End Period: 11-2025				Page: 1 of 1				
Account	Subaccount											Cost
12100	0											0.00
											Account Beginning Balance:	0.00
											Subaccount Beginning Balance:	0.00
Inventory ID	Warehouse	Location	Description									
APJAM96	WHOLESALE		Apple jam 96 oz									0.00
Period	Beg. Cost/Qty.	Receipt	Transfer In	Assembly In	Credit Memo	Adjustment	Transfer Out	Assembly Out	Sale	Issue	End Cost/Qty.	
11-2025	0.00	677.17	0.00	0.00	0.00	-67.72	270.86	0.00	0.00	0.00	338.59	
	0.00	164.00	0.00	0.00	0.00	-10.00	40.00	0.00	0.00	0.00	114.00	
											Subaccount Ending Balance:	338.59
											Account Ending Balance:	338.59
12300	0											0.00
											Account Beginning Balance:	0.00
											Subaccount Beginning Balance:	0.00
Inventory ID	Warehouse	Location	Description									
APJAM96	INTR		Apple jam 96 oz									0.00
Period	Beg. Cost/Qty.	Receipt	Transfer In	Assembly In	Credit Memo	Adjustment	Transfer Out	Assembly Out	Sale	Issue	End Cost/Qty.	
11-2025	0.00	0.00	251.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	251.51	
	0.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00	
											Subaccount Ending Balance:	251.51
											Account Ending Balance:	251.51

Figure: The in-transit quantity



You specify the in-transit account and subaccount in the **In-Transit Account** and **In-Transit Sub.** boxes on the [Inventory Preferences](#) (IN101000) form.

Upgrade Notes

After the upgrade to the current version, the quantities and amounts from existing released adjustments won't be shown in the **Adjusted** column automatically; you need to recalculate item availability data first.

Do the following on the [Recalculate Inventory](#) (IN505000) form:

1. Select a warehouse.
2. Select the **Rebuild Item History Since** check box.
3. To the right of the check box, select the financial period in which the display of quantities will be updated.
4. Click **Process**.

Inventory and Order Management: Improved Planning for Inventory Kits

Good news for users engaged in replenishment and materials planning: In Acumatica ERP 2026 R1, you can save a kit assembly even if some of the kit's lot- or serial-tracked components don't yet have a specified location or lot or serial number. Now you can prepare and save these transactions in advance—even if the components haven't yet arrived at the warehouse—supporting more flexible and accurate demand planning.

Handling an Incomplete Kit Assembly

On the [Kit Assembly](#) (IN307000), you can now save a lot- or serial-tracked kit assembly transaction even if the following settings are missing for one or more of its components:

- Location
- Lot or serial numbers

You can save this transaction with the *On Hold* or *Balanced* status, but you'll be able to release it only after you specify all missing locations and lot or serial numbers. For better visibility of these details, the following columns (shown below) have been added to the table on the **Stock Components** tab:

- **Location**
- **Lot/Serial Nbr.**
- **Expiration Date**

Inventory ID	Location	UOM	Quantity	Unassigned Qty.	Unit Cost	Lot/Serial Nbr.	Expiration Date	Description
ASMJUMOT	R1S1	EA	3.00	0.000000	3,000.00	<SPLIT>		ASM Motor Assembly
ASMJUCENBA	R1S1	EA	3.00	0.000000	8,000.00	<SPLIT>		ASM Centrifugal Basket
ASMJUCONPA	<SPLIT>	EA	3.00	3,000.0000	0.00	<SPLIT>		ASM Control Panel

Figure: New columns on the Kit Assembly form

When you save the kit assembly, the system creates demand item plans for all of its lines. You can view an item's demand plan on the [Inventory Summary](#) (IN401000) form. The demand plan for an item with the missing details has *<Unassigned>* in the **Location** column (shown below.)



The system creates item plans for lines of kit assemblies on hold only if the **Allocate Items in Documents on Hold** check box is selected on the [Inventory Preferences](#) (IN101000) form.

Inventory Summary

Inventory ID * ASMJUCONPA - ASM Control ...
 Warehouse
 Location

Expand by Lot/Serial Numbers

All Records Search

Warehouse	Location	In Assembly Demand	Available	Available for Shipment	SO Booked	SO Allocated	SO Shipped	SO Back Ordered	Purchase Orders
> WHOLESALE	<UNASSIGNED>	3.00	-3.00	-3.00	0.00	0.00	0.00	0.00	0.00
Total:		3.00	-3.00	-3.00	0.00	0.00	0.00	0.00	0.00

Figure: The unassigned quantity for a line with the IN Assembly Demand item plan

Additionally, you can view this demand item plan on the [Inventory Allocation Details](#) (IN402000) form. In the line with the item plan, either the **Location** or **Lot/Serial Number** column—or both—will be empty (shown below).

Inventory Allocation Details

Inventory Summary

Inventory ID * ASMJUCONPA - ASM Control Panel
 Warehouse
 Location
 Lot/Serial Nbr.
 Base Unit EA

On Hand 0.00
 Available -3.00
 Available for Shipping -3.00
 Available for Issue 0.00

On Loc. Not Available 0.00
 Expired [*] 0.00
 [*] Except Location Not Available
 [**] Except Expired and Loc. Not Available

ITEM PLANS QTY BY PLAN TYPE

View Document

All Records Search

Module	Allocation Type	Allocation Date	Document Type	Location	Lot/Serial Number	Reference Nbr.
> IN	IN Assembly Demand	11/3/2025	Assembly			Assembly, 000025

Figure: The item plan with empty Location and Lot/Serial Number columns

Upgrade Notes

In previous versions of Acumatica ERP, you could save lot- and serial-tracked kit assemblies with the *On Hold* status. However, the system did not create item plans for their components with incomplete details, even if the **Allocate Items in Documents on Hold** check box was selected on the [Inventory Preferences](#) (IN101000) form.

After the upgrade to the new version, the system won't create item plans for these components automatically; it will create item plans when you remove the kit assemblies from hold.

Inventory and Order Management: Reworked Shipping with Paceyjet

Staying current with accurate shipping details—especially the shipment date—is essential at every step of the shipping process, from packaging and paperwork to the moment goods actually leave the warehouse. In Acumatica ERP 2026 R1, the workflow for Paceyjet shipments has been updated for specific usage scenarios to help you keep shipment details in sync between Acumatica and Paceyjet. Now you send the shipment to Paceyjet before you confirm it; you complete the document processing only after you receive the update from the carrier service.



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

Paceyjet Usage Scenarios

Acumatica ERP provides five usage scenarios for Paceyjet carriers. You must select one in the **Usage Scenario** box when you create a Paceyjet carrier on the [Carriers](#) (CS207700) form. The updated workflow applies only to four of them:

- *Manual Packing and Shipping in Paceyjet*
- *Auto-Packing and Manual Shipping in Paceyjet*
- *EDI LTL - No Packing Changes*
- *Packing in Acumatica ERP and Shipping in Paceyjet*

In this topic, we'll refer to Paceyjet carriers with these usage scenarios as *applicable Paceyjet carriers*.

Processing Shipments with Paceyjet Carriers

The system shows the new **Send to Paceyjet** button (Item 1) on the form toolbar if you select a ship-via code with an applicable Paceyjet carrier in the **Ship Via** box (Item 2) on the **Shipping** tab of the [Shipments](#) (SO302000) form. This button is also available as a command on the More menu.

Shipments
000075 - Cakeado Cafe

Send To Pacejet Hold ...

Shipment Nbr. 000075
Type Shipment
Status Open
Operation Issue
Shipment Date * 1/28/2026

Customer CAKEADO - Cakeado Cafe
Location MAIN - Primary Location
Warehouse ID WHOLESALE - Wholesale Warehouse
Description

Shipped Quantity 5.00
Shipped Weight 0.000000
Shipped Volume 0.000000
Packages 0
Package Weight 0.000000

DETAILS ORDERS SHIPPING ADDRESSES PACKAGES

Ownership

Shipping Information

Ship Via PACEJET - Code for Pacejet Shop for Rates

Will Call

FOB Point

Shipping Terms

Shipping Zone ID

Delivery Confirmation None

Freight Cost 0.00 Refresh Freight Cost

Invoice Freight Price Ba... Shipment

Override Freight Price

Freight Price 0.00

Packaging Processed in External System

Master Tracking Number

Pacejet Status Not Submitted

Pacejet Workstation ID Default

Delivery Settings

Use Customer's Account

Insurance

Residential Delivery

Saturday Delivery

Additional Handling

Email Notifications

Hazardous Materials

Preprint Return Label

Delivery Instructions

LTL/FTL Settings

Lift Gate

Inside Delivery

Limited Access

Pro Bill Nbr.

Figure: The shipment with an applicable Pacejet carrier

To process shipments in the updated workflow, do the following:

1. Click **Send to Pacejet**.

The system sends the shipment to the Pacejet and changes the status in the **Pacejet Status** box on the **Shipping** tab to *Workbench Processing*.

2. When the processing in Pacejet is complete, click **Update Shipment with Pacejet Data** on the More menu.

The system imports updated details, such as packaging information, shipping date, and freight expenses, to the shipment in Acumatica ERP. The **Pacejet Status** changes to *Completed*.

3. Click **Confirm Shipment** to complete the shipment processing.

Voiding a Shipment in Pacejet

You may need to change the shipment data after you have sent it to Pacejet. If the shipment has the *Open* status in the Summary area of the *Shipments* (SO302000) form, you click the new **Void Shipment in Pacejet** command on the More menu. The system sends an API request to Pacejet, and the carrier service deletes the shipment in their system. The **Pacejet Status** on the **Shipping** tab changes to *Not Submitted*. You can make the required corrections and send the shipment to Pacejet again.

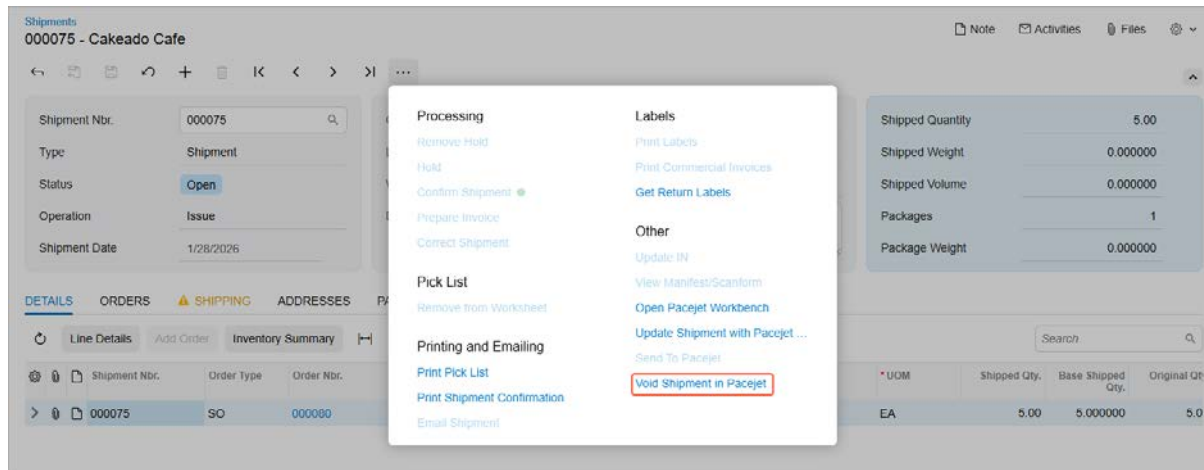


Figure: The Void Shipment in Pacey command

Mass-Processing Shipments with Pacey Carriers

On the [Process Shipments](#) (SO503000) form, you can process multiple Pacey shipments by selecting the *Update Shipment with Pacey Data* and *Send to Pacey* actions (Item 1). These actions have the same functionality as the corresponding commands on the [Shipments](#) (SO302000) form. Additionally, you can review the status of the shipment at the Pacey carrier service in the new **Pacey Status** column (Item 2).

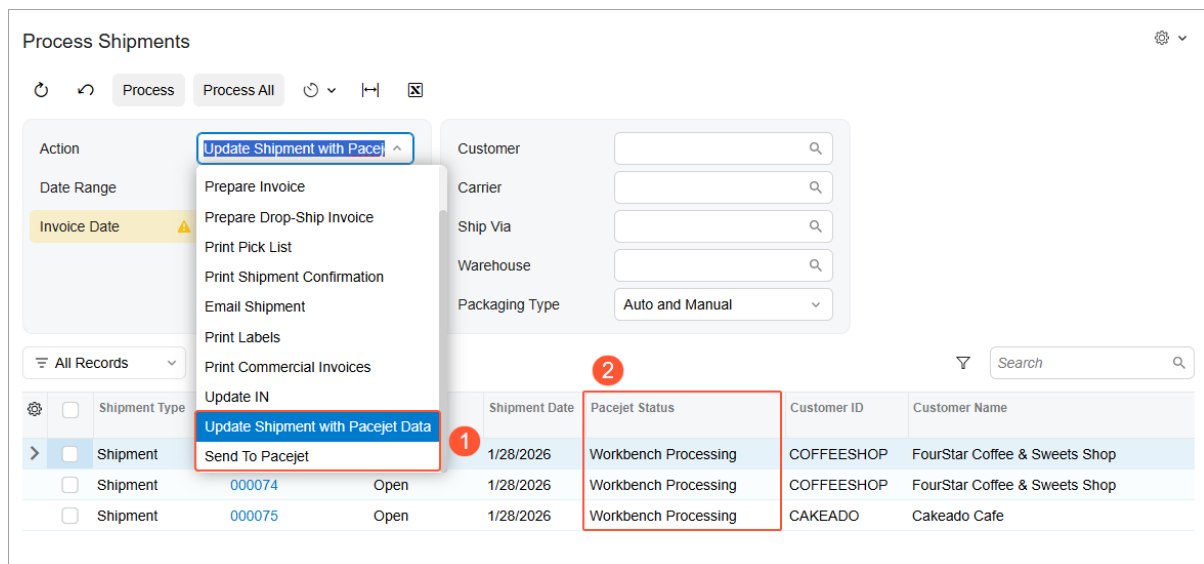


Figure: The mass-processing form

Upgrade Notes

After the upgrade to Acumatica ERP 2026 R1, you may have confirmed shipments whose **Pacey Status** is *Workbench Processing* on the [Shipments](#) (SO302000) form. After these shipments are processed at the Pacey workbench, you can complete their processing in Acumatica ERP by selecting *Update Shipment with Pacey Data* on the [Shipments](#) or [Process Shipments](#) (SO503000) form.

However, if you want to process these shipments using the new workflow, do the following for each of them:

- Open the [Shipments](#) form.
- Click the **Correct Shipment** command on the More menu.

In Acumatica ERP, the system assigns the *Open* status to the shipment and changes the **Pacejet Status** to *Not Submitted*. Additionally, it sends an API request to Pacejet, and the carrier service deletes the shipment in their system.

Now you can process the shipment using the new workflow.

Localization (Canada): New Elements for T5018 and T4A Reporting

Acumatica ERP 2026 R1 introduces enhancements to **T5018 and T4A reporting** that help you stay compliant with the latest requirements of the Canada Revenue Agency (CRA).

The T619 file format, which is used for both T5018 and T4A submissions, has been updated to support the Transmitter RepID. As a result, you can now complete CRA electronic filing using your Representative Identifier (RepID) when accessing the CRA portal—no transmitter number is required.

In addition, T5018 reporting now supports branch-level filing. When tax reporting by branch is turned on, you can generate and submit T5018 e-files for individual branches, giving you greater flexibility and accuracy in multibranch organizations.



These capabilities are available only when both the *Canadian Localization* feature and the *Multibranch Support* feature are enabled on the [Enable/Disable Features](#) (CS100000) form.

The following sections explain how to set up and use the improvements to T5018 and T4A reporting.

Transmitter RepID for Company, Branch, and E-File Preparation

On the [Create CRA E-File](#) (AP507600) form, you can specify the Transmitter RepID. The CRA assigns this alphanumeric code to representatives who register with the Represent a Client service. The new **Transmitter RepID** box (shown below) has been added to the **Summary** tab.

The screenshot shows the 'Create CRA E-File' form with the 'SUMMARY' tab selected. The form is divided into several sections:

- Top Section:** Includes a 'Prepare Report' button and fields for 'Tax Form *' (T4A), 'Date Range' (1/1/2024 to 12/31/2024), 'Payer *' (VA - Subsidiary), 'Filing Type' (Original), 'Year *' (2024), 'Threshold Amount *' (500.00), and 'Revision *' (<NEW>). There is also a checkbox for 'E-File Submitted to CRA'.
- DETAILS / SUMMARY:**
 - Settings:** 'Language *' (English), 'Program Number *' (11111111RT0002), and 'Transmitter RepID' (99AB34C, highlighted with a red border).
 - Company:** 'Company Name *' (Subsidiary).
 - Contact:** 'Name *' (Maxwell Baker), 'Contact Area Code *' (703), 'Phone *' (555-1212), 'Extension Number', 'Email *' (admin@revisiontwo.com), and 'Second Email'.

Figure: The Transmitter RepID box on the Create CRA E-File form

The box is required, and its default value is copied from the **Transmitter RepID** box on the **Canadian Tax Reporting** tab of the [Companies](#) (CS101500) or [Branches](#) (CS102000) form. Below you can see this box on the [Companies](#) form.

The screenshot shows the 'Companies' form for 'VA - Subsidiary'. The 'CANADIAN TAX REPORTING' tab is active. Under the 'CRA' section, the 'Transmitter RepID' field is highlighted with a red box and contains the value '99AB34C'. Other fields include 'Company ID *' (VA), 'Company Name *' (Subsidiary), 'Company Type' (Without Branches), 'Status' (Active), 'Payroll Account Number' (11111111RT0002), 'Information Returns Account ...' (11111111RZ0002), and 'T5018 Year Type' (Calendar Year).

Figure: The Transmitter RepID box on the Companies form

On the [Companies](#) and [Branches](#) forms, the **Transmitter RepID** box is empty by default. If you file on behalf of an organization through CRA’s Represent a Client service, you can record the RepID once in the company or branch settings and reuse it when creating e-files.

File T5018 at the Branch Level

For T5018, the **Transmitter** box on the [Create CRA E-File](#) (AP507600) form has been renamed to **Payer**, as shown below.

The screenshot shows the 'Create CRA E-File' form. The 'Payer *' field is highlighted with a red box and contains the value 'VA - Subsidiary'. Other fields include 'Tax Form *' (T5018), 'Date Range' (1/1/2024 to 12/31/2024), 'Filing Type' (Original), 'Year *' (2024), 'Revision *' (<NEW>), 'Threshold Amount *' (500.00), 'Language *' (English), 'Program Number *' (11111111RZ0002), 'Transmitter RepID' (99AB34C), 'Name *' (Maxwell Baker), 'Contact Area Code *' (703), 'Phone *' (555-1212), 'Extension Number', 'Email *' (admin@revisiontwo.com), and 'Second Email'. There is also an 'E-File Submitted to CRA' checkbox.

Figure: The Payer box on the Create CRA E-File form

You can select a company branch in the **Payer** box to file T5018 returns for this branch. A branch can be selected if it belongs to a company for which the *Canadian Localization* and *Multibranch Support* features are enabled and the **File Taxes by Branch** check box is selected on the *Companies* (CS101500) form. You can't select companies when the **File Taxes by Branch** check box is selected—only their branches are available.

Visibility of Canadian Tax Reporting Elements and Tabs

The tables below show which elements and tabs appear on the *Companies* (CS101500) and *Branches* (CS102000) forms. Because Acumatica ERP displays only elements that are relevant to your enabled features and settings, some UI elements are hidden in certain scenarios. These tables help you understand how key settings affect what you see on each form.

The visible elements differ based on:

- Whether the **File Taxes by Branch** check box is cleared (first table) or selected (second table).
- Whether the *Canadian Localization* feature is enabled. This feature provides Canada-specific functionality, including electronic submission of forms to the CRA).
- Whether the *Canadian Payroll* feature—which activates the Canadian payroll functionality—is enabled.

Table: When the File Taxes by Branch Check Box Is Cleared

	<i>Canadian Localization</i> Is Enabled	<i>Canadian Localization</i> Is Disabled
<i>Canadian Payroll</i> is enabled	<i>Companies</i> form: The T4 , T4A , and T5018 boxes appear. <i>Branches</i> form: The Canadian Tax Reporting tab doesn't appear.	<i>Companies</i> form: The T4 boxes appear. <i>Branches</i> form: The Canadian Tax Reporting tab doesn't appear.
<i>Canadian Payroll</i> is disabled	<i>Companies</i> form: The T4A and T5018 boxes appear. <i>Branches</i> form: The Canadian Tax Reporting tab doesn't appear.	<i>Companies</i> form: The Canadian Tax Reporting tab doesn't appear. <i>Branches</i> form: The Canadian Tax Reporting tab doesn't appear.

Table: When the File Taxes by Branch Check Box Is Selected

	<i>Canadian Localization</i> Is Enabled	<i>Canadian Localization</i> Is Disabled
<i>Canadian Payroll</i> is enabled	<i>Companies</i> form: The Canadian Tax Reporting tab doesn't appear. <i>Branches</i> form: The T4 , T4A , and T5018 boxes appear.	<i>Companies</i> form: The Canadian Tax Reporting tab doesn't appear. <i>Branches</i> form: The T4A boxes appear.
<i>Canadian Payroll</i> is disabled	<i>Companies</i> form: The Canadian Tax Reporting tab doesn't appear. <i>Branches</i> form: The T4A and T5018 boxes appear.	<i>Companies</i> form: The Canadian Tax Reporting tab doesn't appear. <i>Branches</i> form: The Canadian Tax Reporting tab doesn't appear.

Removal of the Transmitter Number Box

The **Transmitter Number** box has been removed from the following locations:

- The *Create CRA E-File* (AP507600) form (**Summary** tab for both T5018 and T4A)

- The [Companies](#) (CS101500) and [Branches](#) (CS102000) forms (**Canadian Tax Reporting** tab), where it has been replaced by the new **Transmitter RepID** box

E-File Updates

- In the T619 Electronic Transmittal file, the **Transmitter RepID** value is copied from the [Create CRA E-File](#) (AP507600) form for both T5018 and T4A.
- The XML file has been changed as follows:
 - The *Transmitter number* element (<trnmtr_nbr>...</trnmtr_nbr>) has been removed.
 - The *TransmitterRepID / RepID* element (<TransmitterRepID><RepID>...</RepID></TransmitterRepID>) has been added.

Key Takeaways

- The Transmitter RepID is now captured for T4A and T5018 and is included in the CRA electronic transmittal output.
- T5018 e-filing now supports **branch-level** reporting through payer selection when a company files taxes by branch.
- **Transmitter Number** has been removed from the relevant UI areas and replaced by **Transmitter RepID** where applicable.

Manufacturing: Accurate Time Tracking for High-Speed Production

Many manufacturers operate production lines where an individual operation for a single unit takes only a few seconds. This is common in high-speed and automated production environments, such as plastic molding, food and beverage packaging, electronics assembly, and garment or glove production. In these environments, precision is essential to accurately represent how work is planned, executed, and analyzed on the shop floor.

Acumatica ERP 2026 R1 supports **entering, recording, storing, and reporting time in seconds** across production, labor, and machine processes. Manufacturers can define operation times exactly as they occur, capture labor and machine usage with greater precision, and view planned, actual, and variance times in a format that aligns with real production behavior. This precision extends to labor costing, delivering a more accurate calculation of true production costs.

Support for Seconds in Time Formats

On the [BOM Preferences](#) (AM101000) form, the **Operation Time Format** and **Total Time Format** settings now let you select time formats that include seconds, as shown below. If you select a format that supports seconds, time values in manufacturing forms and reports are displayed with second-level precision.

The screenshot shows the 'BOM Preferences' form with the 'GENERAL' tab selected. The 'Data Entry Settings' section is expanded, and a dropdown menu is open for the 'Operation Time Format' field. The dropdown lists several time format options: '### d ## h ## m', '### d 00:00', '#### h ## m', '## h ## m', '### d 00:00:00' (highlighted in blue), '#### h ## m ## s', '## h ## m ## s', and '00:00:00'. Below the dropdown, there are three checkboxes: 'Require ECR/ECO for New BOM Revisions' (unchecked), 'Require ECR Before Creating ECO' (checked), and 'Hold BOM Revisions on Entry' (checked). To the right, the 'Work Center Defaults' section shows three input fields for 'Default Queue Time *', 'Default Finish Time *', and 'Default Move Time *', each containing the value '0 h 00 m 00 s'.

Figure: New time formats

The following forms and reports show operation time in the selected time format:

- [Bill of Material](#) (AM208000)
- [Production Order Details](#) (AM209000)
- [Production Order Maintenance](#) (AM201500)
- [Engineering Change Request](#) (AM210000)
- [Engineering Change Order](#) (AM215000)
- [Estimate](#) (AM303000)
- [Estimate Operation](#) (AM304000)
- [Engineering Workbench](#) (AM208100)
- [Labor](#) (AM301000)

- [Process Cost Rollup Results](#) (AM508000)
- [Archived Cost Rollups](#) (AM408000)
- [Production Order Performance](#) (AM652000)
- [BOM Routing](#) (AM612000)

When you create new bills of material, production orders, engineering change requests, or engineering change orders, the system applies your currently selected time format automatically, allowing you to work with seconds if your time format includes them.

Hard-Coded Support for Second-Level Labor Tracking

Regardless of the time format selected on the [BOM Preferences](#) (AM101000) form, your labor time is recorded and processed in seconds on the following forms:

- [Clock Entry](#) (AM315000)
- [Multiple Production Clock Entry](#) (AM316000)
- [Approve Clock Entries](#) (AM516000)
- [Scan Labor](#) (AM302020)

If you've selected a minute-based time format on the [BOM Preferences](#) form, labor time is displayed in minutes on the following forms and reports:

- [Production Order Maintenance](#) (AM201500)
- [Production Order Details](#) (AM209000)
- [Production Order Performance](#) (AM652000)

Although minutes are the smallest units displayed in this case, the system continues to store and process time in seconds. As a result, costing and labor transactions are calculated with full second-level precision. Seconds are not rounded—they are simply hidden from view to match the selected format.

Time Storage and Cost Calculation in Seconds

All manufacturing time data—including operation times, labor times, and clock entries—is now stored in the database in seconds. Your selected time format controls how time is displayed on forms and reports, but all calculations are performed using second-level precision.

As a result, manufacturing costs are always calculated by using the exact operating time in seconds. This applies to:

- Labor costs
- Machine costs
- Production order cost rollups and updates

Exceptions

On the [Create Labor Time Activities](#) (AM513000) form, labor time is rounded to whole minutes when activities are created, even if the original time was reported in seconds. If the recorded time is between 0 and 29 seconds, no value is displayed. This reflects how employee time activities are handled (only in minutes).

Upgrade Notes

Because all time values in manufacturing are now stored and processed in seconds, **integrations and customizations** that pass or expect time values as total minutes must be updated to handle **total seconds** instead. This includes direct use of raw time fields and calls made through manufacturing endpoints involving time values.

After an upgrade, open production orders may show **minor cost differences** because costs are now calculated to the second, whereas they were previously calculated using whole minutes. To avoid unexpected variances, we recommend completing or closing production orders before upgrading.


Manufacturing: Enhanced Costing Logic for Overissued Inventory

When you issue materials to a production order and the issued quantity exceeds the on-hand quantity, the stock balance becomes negative. At that point, the system uses the item's current cost, which is determined by its valuation method. However, if new stock later arrives at a different cost, the cost used for the material issue will no longer match the actual cost recorded in the receipt.

Depending on how the system handles this difference, your production work-in-process values may appear out of sync with your general ledger entries. Ultimately, the mismatch can lead to misreported actual production costs, complex reconciliations, and potential confusion during the financial month-end close.

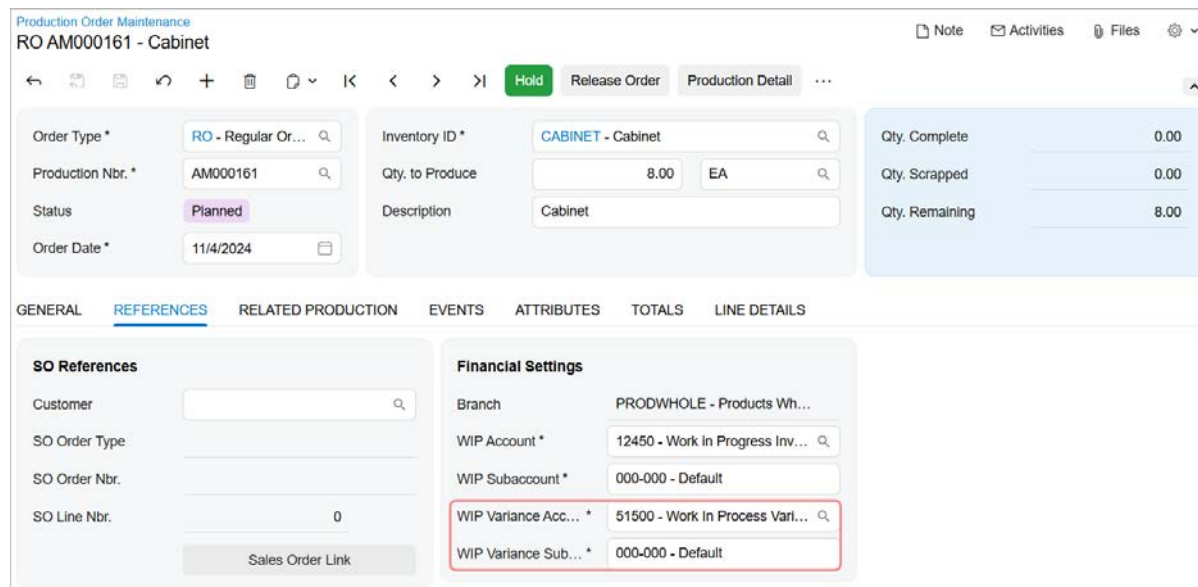
In Acumatica ERP 2026 R1, cost variances caused by negative inventory are posted to a dedicated **WIP Variance Account**, while true production costs continue to be posted to the regular **WIP Account**. As a result:

- Production costs are reflected consistently across reports.
- Reconciliation of the WIP report and the general ledger becomes easier.
- Overall financial data becomes more accurate and reliable.

 This scenario can occur only if the **Allow Negative Quantity** check box is selected on the *Item Classes* (IN201000) form for the item class of the issued stock item. This setting is typically used when timing issues delay the recording of stock receipts in the warehouse and materials must be issued to production before the receipt is entered into the system.

Setting Up the GL Accounts

To ensure that the system uses the correct GL accounts to post the costs of the production order, open the **References** tab of the *Production Order Maintenance* (AM201500) form—as shown below—and verify the **WIP Account** and **WIP Variance Account**.



The screenshot shows the 'Production Order Maintenance' form for 'RO AM000161 - Cabinet'. The 'REFERENCES' tab is active, displaying 'SO References' and 'Financial Settings'. In the 'Financial Settings' section, the 'WIP Account' is set to '12450 - Work in Progress Inv...' and the 'WIP Variance Account' is set to '51500 - Work In Process Vari...', both highlighted with a red box.

Qty. Complete	0.00
Qty. Scrapped	0.00
Qty. Remaining	8.00

Figure: GL accounts on the Production Order Maintenance form

Posting to the WIP Variance Account

To record the cost variance portion of a transaction, the system now uses the **WIP Variance Account** when posting journal transactions that offset negative inventory resulting from receipts, issues, adjustments, transfers, or kit assemblies.

Upgrade Note

If a production order resulted in a negative inventory balance before the upgrade and the corresponding receipt hadn't yet been processed, the system will retain that negative layer after the upgrade. When the receipt is processed, the system will automatically apply it to offset the existing negative inventory balance.

Manufacturing: Grouping Work Centers into Manufacturing Departments

In a busy production environment, you often need a clear way to look at resources by production area rather than having to review each work center one by one.

In Acumatica ERP 2026 R1, you can group work centers into **manufacturing departments**. A manufacturing department represents a broad production area, such as welding or assembly, within a warehouse and may include multiple work centers.

After you define departments for a specific warehouse and assign work centers to them, you can filter the list of work centers by department to display only the resources that belong to a particular production area. This gives you a clearer, more structured way to organize and navigate your work centers.

Defining Manufacturing Departments and Assigning Work Centers

You can use the new [Manufacturing Departments](#) (AM217000) form, shown below, to create manufacturing departments for a specific warehouse and maintain the list of assigned work centers.

The screenshot shows the 'Manufacturing Departments' form for 'ASSEMBLY - Assembly department' in the 'WHOLESALE - Wholesale Warehouse'. The form includes fields for 'Manufacturing Department ID' (ASSEMBLY), 'Description' (Assembly department), and 'Warehouse' (WHOLESALE - Wholesale Warehouse). Below the form is a table of assigned work centers.

Work Center	Description	Warehouse	Active	Standard Cost	Basis for Capacity	Scrap Action Default	Outside Process	Backflush Labor	Backflush Materials	Control Point	Allow Clock Entry for Multiple Production Orders
WC10	Assembly	WHOLESALE	<input checked="" type="checkbox"/>	20.00	Crew Size	No Action	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WC100	Inspection	WHOLESALE	<input checked="" type="checkbox"/>	10.00	Crew Size	No Action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WC30	Final Assembly	WHOLESALE	<input checked="" type="checkbox"/>	15.00	Crew Size	No Action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure: The Manufacturing Departments form

To assign a work center to a manufacturing department, you have two options:

- On the [Manufacturing Departments](#) (AM217000) form, open a department and add an unassigned work center to the **Work Centers** table.
- Use the new **Manufacturing Department** box on the [Work Centers](#) (AM207000) form to assign the current work center to an existing department, as shown below.

The screenshot shows the 'Work Centers' form for 'WC10 - Wholesale Warehouse'. At the top, there are navigation icons and a search bar. Below that, there are two main sections: 'Work Center *' and 'Description'. The 'Work Center *' section has a dropdown menu set to 'WC10' and a checked 'Active' checkbox. The 'Description' section has a dropdown menu set to 'Assembly' and a 'Warehouse *' dropdown set to 'WHOLESALE - Wholesale Warehouse'. Below these are tabs for 'GENERAL', 'SHIFTS', 'OVERHEAD', 'MACHINES', 'WHERE USED', and 'SUBSTITUTES'. The 'GENERAL' tab is selected, showing 'Settings' and 'Production Defaults'. The 'Settings' section includes 'Standard Cost' (20.00), 'Basis for Capacity' (Crew Size), and a 'Manufacturing Department' dropdown set to 'ASSEMBLY'. The 'Production Defaults' section includes 'Default Queue Time *', 'Default Finish Time *', 'Default Move Time *', 'Scrap Action Default' (No Action), and checkboxes for 'Backflush Materials', 'Backflush Labor', 'Control Point', and 'Outside Process'.

Figure: The new box on the Work Centers form

To review all existing departments in a single list, you can use the new *Manufacturing Departments (AM2170PL)* list of records, which displays manufacturing departments in a table with their key details, as shown below.

The screenshot shows the 'Manufacturing Departments' list form. It has a search bar for 'Warehouse' and a filter dropdown set to 'All Records'. Below the search bar is a table with the following data:

Manufacturing Department ID	Description	Warehouse
ASSEMBLY	Assembly department	WHOLESALE
CNC	CNC department	WHOLESALE
WELDING	Welding department	WHOLESALE

Figure: The Manufacturing Departments list form

Added Visibility into Work Centers and Manufacturing Departments

These enhancements let you easily see how work centers relate to manufacturing departments:

- On the **Work Centers (AM2070PL)** form, the new **Manufacturing Department** column shows the department assigned to each work center. You can use the column's standard filtering capabilities to quickly focus on work centers that belong to a particular department.
- In the **Bills of Material** workspace, the new **Work Centers** category groups together forms related to work centers, as shown below.

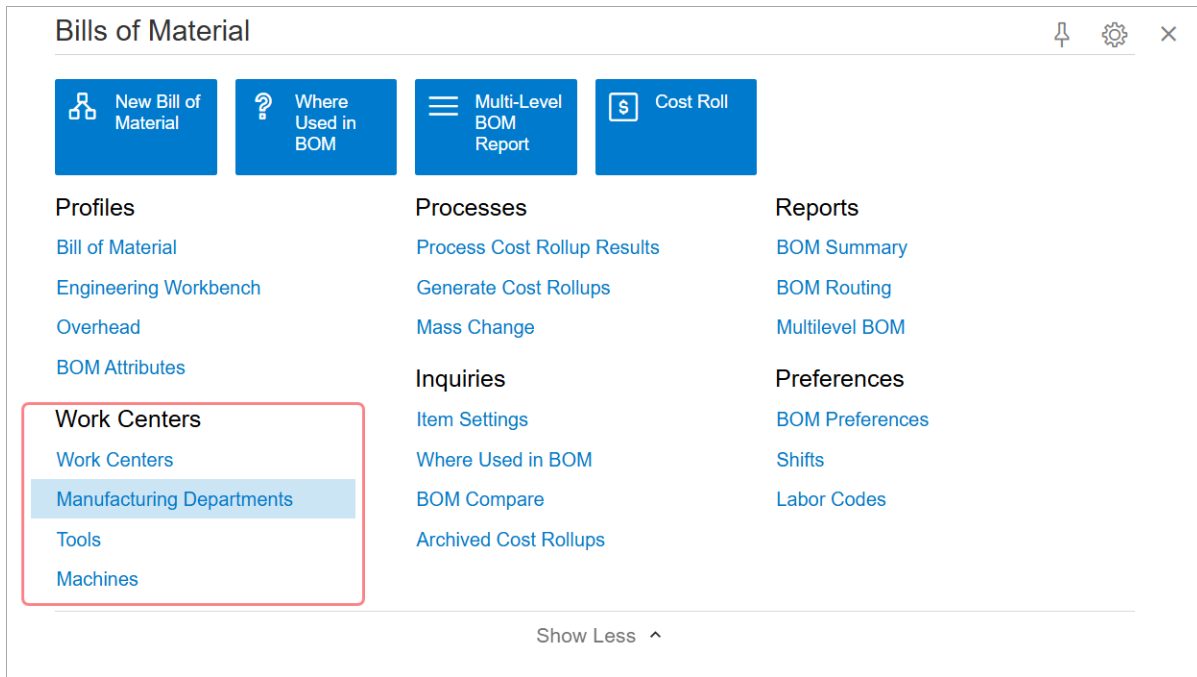


Figure: New category in the Bills of Material workspace

Limitations

In this release, the manufacturing departments you create in the system are not yet involved in production reporting, planning, or scheduling.

However, you can use manufacturing departments in custom generic inquiries and dashboards to provide more granular visibility for production analysis.

Manufacturing: Shop Floor Kiosk

With Acumatica ERP 2026 R1, you can start using the new **Shop Floor Kiosk** to capture production data on the shop floor without slowing operators down. Designed specifically for shop floor use, the kiosk delivers a focused, simplified experience. Operators spend less time interacting with the system and more time doing productive work—while you still get the data you need.

You can launch and run the kiosk without requiring operators to sign in as Acumatica ERP users. Supervisors can bring kiosks online quickly, operators can identify themselves in seconds, and each worker sees only the actions that fit their role, work center, and current tasks. The result is faster onboarding, minimal training, fewer errors, and more consistent production reporting directly from the shop floor.

Key Capabilities

With the Shop Floor Kiosk, shop floor users can:

- **Start work quickly** with no Acumatica ERP sign-in required for operators
- **See only relevant tasks** based on employee role, work center, and active operations
- **Clock in to and out of production operations** to capture labor data in real time
- **Report production results**, including completed quantities, scrap, and finish times
- **Issue materials easily**, with lot and serial numbering supported
- **Track direct labor** using simple, guided workflows
- **Access operation-related context**—such as steps, documents, images, and attachments—directly at the kiosk

Enabling the Feature

On the [Enable/Disable Features](#) (CS100000) form, the new *Shop Floor Kiosk* feature switch has been introduced (see below). The *Shop Floor Kiosk* feature must be enabled before you can proceed with the kiosk configuration.

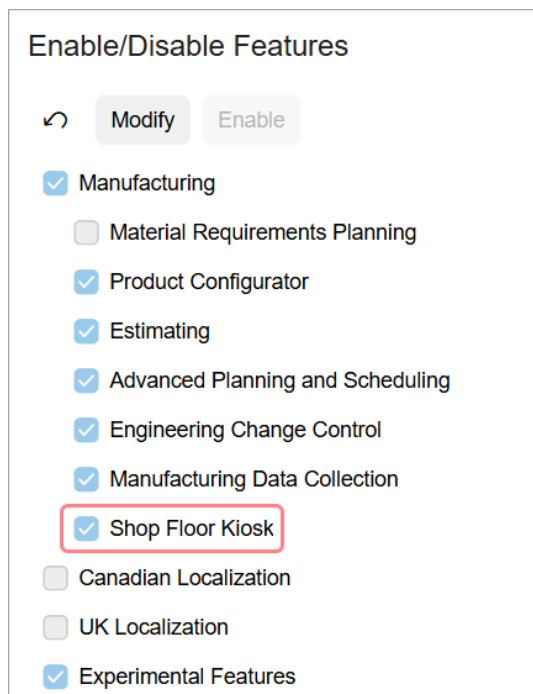


Figure: The Shop Floor Kiosk feature switch

Deploying a Shop Floor Kiosk Instance

To get started, you need to deploy the Shop Floor Kiosk as a new portal instance by using the Acumatica ERP Configuration wizard.

In the wizard:

1. At the **Database Configuration** step, connect to the existing database used by your production instance.
2. At the **Instance Configuration** step, select the **Create Modern Portal** option, as shown below.

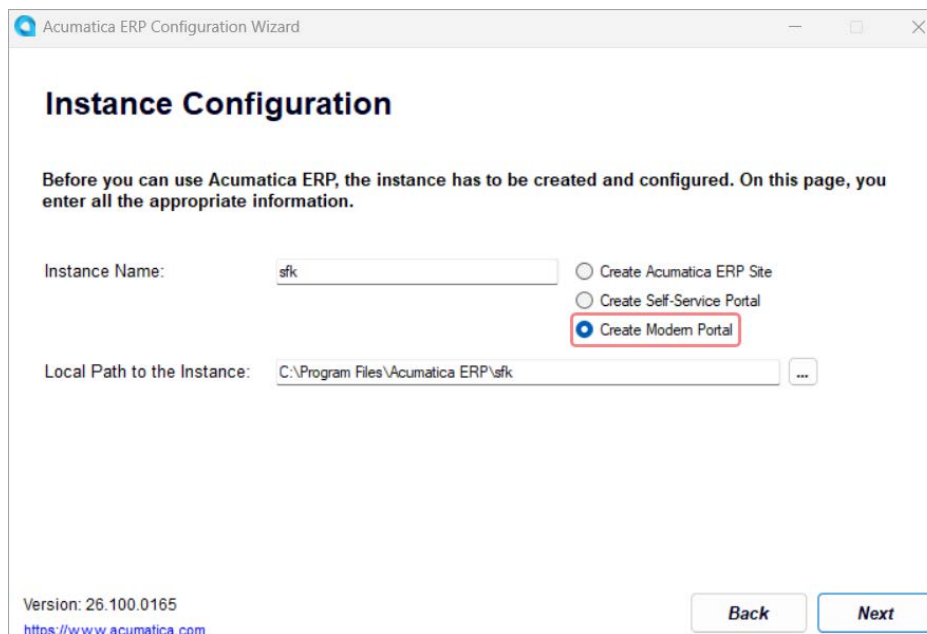


Figure: The Instance Configuration step

Editing the Website Configuration Files

After the instance is deployed, open the `web.config` file for both the ERP installation and the kiosk installation. The file is located in each installation's website folder.

In the `appSettings` section of the file, add the following line.

```
<add key="IsMultiSiteMode" value="True" />
```

Creating a Shop Floor Kiosk Portal

You use the [Portals](#) (SP701000) form to create a Shop Floor Kiosk portal.

In the Summary area, you need to specify:

- The name of the portal
- The URL of the website
- *Shop Floor Kiosk* as the portal type
- The predefined *SFK App Access* user role in the **Portal Access Role** box

The screenshot shows the 'Portals' configuration interface for 'SHOPFLOORKIOSK'. The 'GENERAL' tab is active, displaying the following fields:

- Portal Name ***: SHOPFLOORKIOSK
- Portal URL ***: https://example.com/sfk
- Portal Description**: Shop floor kiosk
- Portal Type**: Shop Floor Kiosk
- Portal Access Role ***: SFK App Access - Shop Floor Kiosk App Access
- Online**:

Below the form, the 'SHOP FLOOR KIOSK' section is expanded, showing:

- Screens by Area**:
 - Shop Floor Kiosk
 - AM000000 - Shop Floor Kiosk
- Others**: A warning message: "Forms added to this section may expose ERP data to external portal users. Review the filters, visible UI elements, and row-level security on the form to ensure that portal users can access only the data they are authorized to access based on their assigned roles."

Figure: Portal settings

Additionally, you must specify the required settings as follows:

- On the **General** tab, select the check box for the **Shop Floor Kiosk** category. Make sure that the **AM000000 - Shop Floor Kiosk** check box under this category is selected automatically.
- On the **Portal Settings** tab:
 - Select *Shop Floor Kiosk (AM000000)* in the **Default Home Form** box.
 - Upload an image in the **Sign-In Page Image** box; this image will be displayed during the administrative sign-in to the kiosk.
- On the **Shop Floor Kiosk** tab:
 - Specify the branch to be used for posting manufacturing transactions.
 - Specify the predefined *SFK User* user role to allow production employees with the same user role to access the kiosk.

Creating a Kiosk Service User Account

To launch the Shop Floor Kiosk, you must use a separate service user account that is assigned the *SFK App Access* user role—that is, the role specified in the **Portal Access Role** box on the [Portals](#) (SP701000) form. When you sign in

with this account, the system starts an outer session and authorizes the kiosk application to access the database. When the kiosk is running, shop floor operators can sign in and begin using the application.

You can create a service user account by using the [Users](#) (SM201010) form, where you must enter at least the following required settings:

1. **Login:** Enter the username that will be used for signing in.
2. **Email:** Enter a service email address, which is required due to a limitation that doesn't allow user accounts to be created without an email address.
3. On the **Roles** tab, ensure that the *SFK App Access* user role is selected.

Additionally, you can click **Reset Password** on the form toolbar to specify a new password for this user account.

Controlling User Access

To access the Shop Floor Kiosk, shop floor operators must have user accounts in Acumatica ERP with the predefined *SFK User* role assigned on the [Users](#) (SM201010) form. In addition, they must have linked employee records on the [Employees](#) (EP203000) form in which:

- The **Production Employee** check box is selected.
- The new **Shop Floor Shift** box is filled in.



If the *Shop Floor Kiosk* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, the **Shop Floor Shift** box must be filled in for each production employee. If a single shift is defined on the [Shifts](#) (AM205000) form, this shift is inserted in the **Shop Floor Shift** box by default. If multiple shifts are defined, the **Shop Floor Shift** box remains blank, and you need to select the appropriate shift manually.

Signing In to the Shop Floor Kiosk

Shop Floor Kiosk operators begin their work by viewing a list of all production operations that are currently in progress on the shop floor, as shown below.



Sign In

Operations in Progress



Employee	Production Nbr.	Operation	Operation Description	Work Center	Work Center Description	Planned Labor Time	Remaining Time	Completed Qty.	Finish Time
Paperno,...	AM000126	200	Chamfer	20	Chamfering	3h 2m	1m	98	30m
Vydrin, V...	AM000122	100	End Milling	12	Milling	2h 56m	5m	94	5m
Chernysh...	AM000121	100	Hob (AG...	100	Hobbing	40m	28m	65	30m
Okamuro,...	AM000120	300	Weld +XR	31	Welding	28m	28m	53	30m
Rowley, A...	AM000119	300	Weld +XR	31	Welding	28m	28m	53	30m
Baldwin,...	AM000118	300	Weld +XR	31	Welding	28m	28m	53	5m
Cholan, A...	AM000117	300	Weld +XR	31	Welding	28m	28m	53	5m
Henbelley...	AM000100	300	Weld +XR	31	Welding	28m	28m	53	5m
Jayaward...	AM000009	300	Weld +XR	31	Welding	28m	28m	53	30m
Griffiths, Ed	AM000343	300	Weld +XR	31	Welding	28m	28m	53	10m
St. Amour...	AM000349	300	Weld +XR	31	Welding	28m	40m	31	
Pavlov, Al...	AM000351	100	End Milling	10	Milling	5m	2h 56m	11	

Figure: Operations in progress

From this page, an operator clicks **Sign In** and selects their name from the list of active production employees. This identifies the operator in the Shop Floor Kiosk. After the sign-in, the home page opens and displays the options available for that specific employee.

Starting from the Home Page

The home page (shown below) contains a set of tiles whose number may vary depending on certain operational conditions (described below). An operator can click any tile to go to a dedicated page.

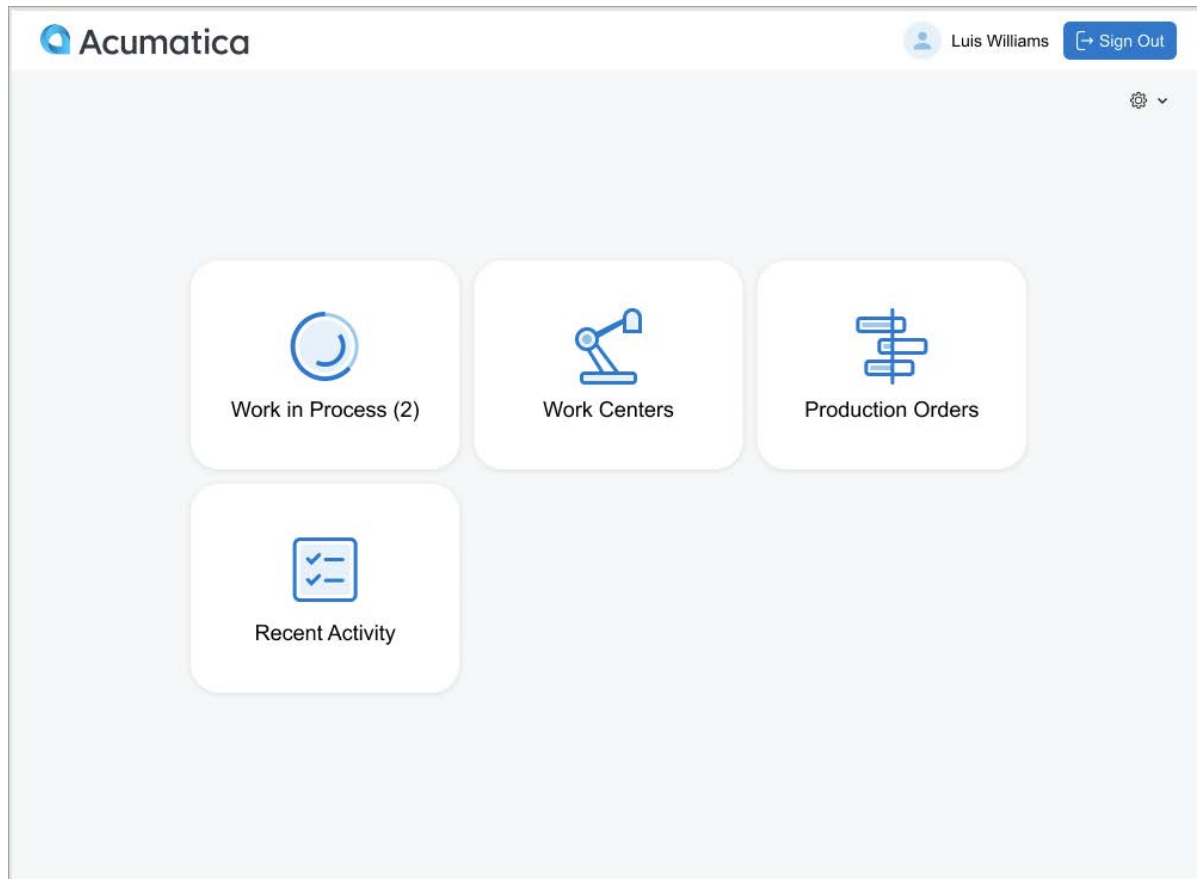


Figure: The home page

The operator may see any of these tiles:

- **Work in Process** (followed by the number of the operator's ongoing operations in parentheses): When the operator clicks this tile, the production reporting page opens, where they can clock out of operations or report the operations' completed quantities and scrap. This tile is unavailable if the operator isn't clocked in to any operation.



Currently, the Shop Floor Kiosk doesn't support multiple production clock entries.

- **Work Centers:** The operator clicks this tile to view a list of active work centers. By clicking any work center's ID, the operator can view its dispatch list and then select a production order operation to start working on. This tile is unavailable when there are no active work centers in the system.
- **Production Orders:** By clicking this tile, the operator opens a list of production orders of the *Regular* function with the *Released*, *In Process*, and *Completed* statuses. If there are no such orders in the system, this tile is unavailable. The tile is another way for the operator to access the needed operation.
- **Recent Activity:** The operator clicks this tile to open a chronological list of actions performed by the operator in the Shop Floor Kiosk.

Read on for more details about how operators can proceed using these tiles.

Reporting Labor Time

Once the operator selects an operation, its details are displayed in the Shop Floor Kiosk, as shown below.

If the operation isn't configured for labor backflushing, the operator can clock in or clock out to start or stop recording labor time for the operation. When the operator clocks out, the corresponding labor transaction is automatically created and released.

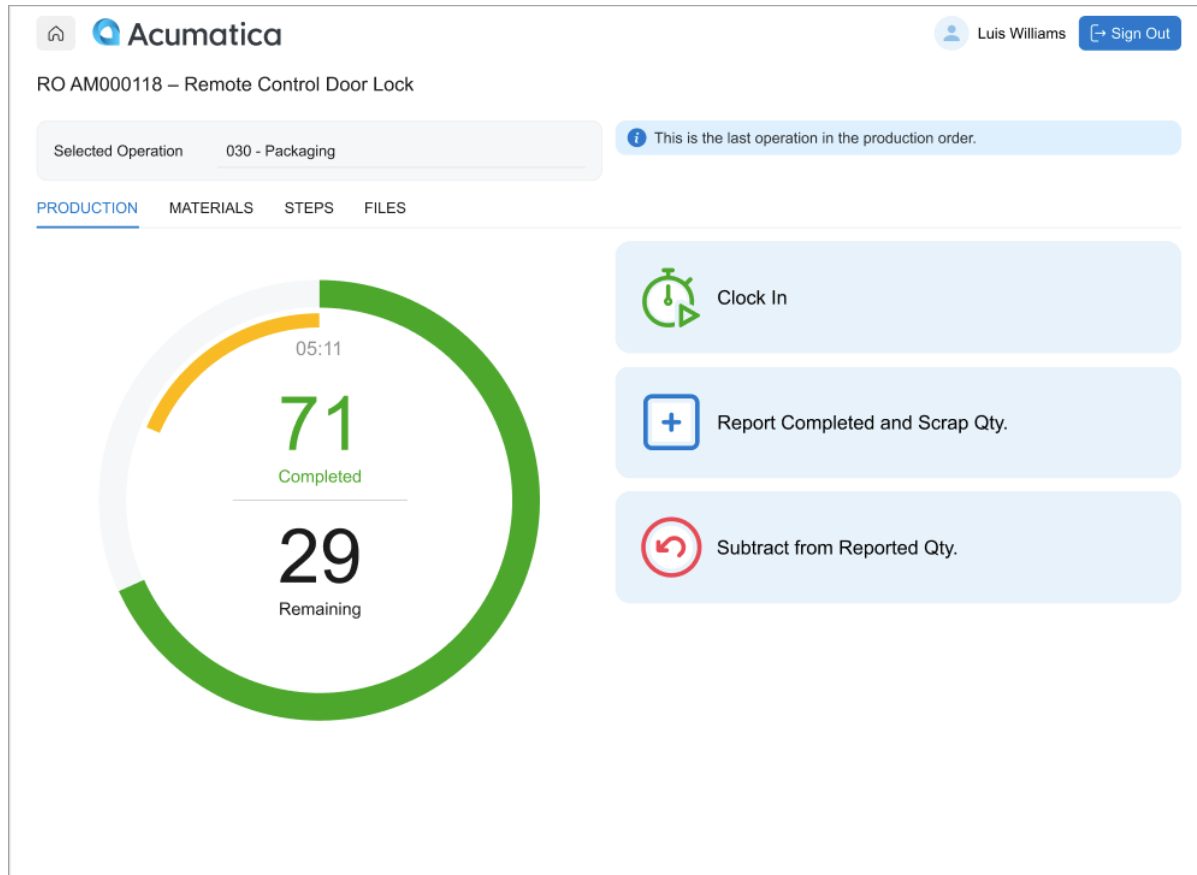


Figure: Production operation details page

Reporting Completed and Scrap Quantities

To report production quantities for the selected operation, the operator clicks the **Report Completed and Scrap Qty.** button on the operation details page.

A dialog box opens with the **Completed** and **Scrapped** tabs (shown in the screenshots below), where the operator can:

- Report completed quantities for the selected operation, including partial or remaining quantities
- Report scrap quantities at the same time as completed quantities using a single, unified workflow
- Use one-click options to automatically report all remaining quantities needed to complete an operation
- Capture required production attributes (such as measurements or inspection results) when quantity reporting requires additional context
- Handle lot- and serial-tracked items by selecting preassigned numbers, entering them manually, or letting the system auto-generate them
- Submit quantities without interruption, while the system creates and releases the required move transactions in the background



The available capabilities depend on how your manufacturing workflows are configured in Acumatica ERP.

Report Quantities for RO AM000118 – Remote Control Door Lock

COMPLETED SCRAP

Selected Operation: 030 - Packaging

Completed Qty. to Report: EA

Tracked Qty. Difference: EA

Serial Numbers

<input type="checkbox"/>	Serial Nbr.	UOM
<input checked="" type="checkbox"/>	SN-000074	EA
<input checked="" type="checkbox"/>	SN-000075	EA
<input checked="" type="checkbox"/>	SN-000076	EA
<input checked="" type="checkbox"/>	SN-000077	EA
<input checked="" type="checkbox"/>	SN-000078	EA
<input type="checkbox"/>	SN-000079	EA

Production Attributes

Attribute	Description	Value	Required
TMPTRTRE	Temperature		<input checked="" type="checkbox"/>
PRSSRUR	Pressure		<input checked="" type="checkbox"/>
OXGNG	Oxigen		<input type="checkbox"/>
TESTED	Tested	<input type="checkbox"/>	<input type="checkbox"/>

Totals

Reported Completed Qty.	75	EA
Reported Scrap Qty.	1	EA
Remaining Qty.	25	EA

Reported Items

Serial Nbr.	UOM
SN-000072	EA
SN-000070	EA
SN-000069	EA
SN-000068	EA
SN-000067	EA
SN-000066	EA
SN-000065	EA
SN-000064	EA

Scrap

Serial Nbr.	UOM	Operation
SN-000071	EA	030 - Packaging
SN-000073	EA	020 - Testing

Figure: Completed quantity reporting

Report Quantities for RO AM000118 – Remote Control Door Lock

COMPLETED **SCRAP**

Selected Operation 030 - Packaging

Scrap Reason SCRAP

Scrap Qty. to Report 10 EA

Tracked Qty. Difference 10 EA

Qty. to Generate 1 EA

Starting Serial Nbr. SN-000074 **Generate**

Serial Numbers

Add Serial Nbr. Search

Serial Nbr.	UOM	Remove
		X

Production Attributes

Label	Description	Value	Required
TMPTRTRE	Temperature		<input checked="" type="checkbox"/>
PRSSRUR	Pressure		<input checked="" type="checkbox"/>
OXGNG	Oxygen		<input type="checkbox"/>

Totals

Reported Completed Qty.	75	EA
Reported Scrap Qty.	1	EA
Remaining Qty.	25	EA

Reported Items

Serial Nbr.	UOM
SN-000072	EA
SN-000070	EA
SN-000069	EA
SN-000068	EA
SN-000067	EA
SN-000066	EA

Scrap

Serial Nbr.	UOM	Operation
SN-000071	EA	030 - Packaging
SN-000073	EA	020 - Testing

Report **Cancel**

Figure: Scrap reporting

When necessary, operators can reduce previously reported completed quantities by clicking the **Subtract from Reported Qty.** button on the operation details page.

Issuing Materials

Operators can review and issue the materials needed for production operations directly from the shop floor. By using the **Materials** tab of the operation details page (shown below), operators can:

- View required materials for the operation
- Issue selected materials individually or in bulk by using the **Issue** button
- Issue all required materials with a single action, **Quickly Issue All**, when possible
- Issue full or partial quantities, adjusting quantities based on what can be completed during the shift
- Select warehouse locations and lot or serial numbers when issuing materials, based on availability and configuration
- Return issued materials back to inventory if they were issued in error or not fully consumed
- Issue by-products from an operation directly to inventory
- Submit material issues without interruption, while the system creates and releases the required material transactions in the background

RO AM000118 – Remote Control Door Lock

Selected Operation: 10 - Laser metal cutting

This is the last operation in the production order

PRODUCTION MATERIALS STEPS FILES

Issue Quickly Issue All Show Backflushed Materials

<input type="checkbox"/>	Inventory ID	Description	UOM	Qty. to Issue	Total Required...	Total Issued Qty.	Total Remaining Qty.	Qty. Available for Issue	Qty. On Hand
<input checked="" type="checkbox"/>	MGSHEET	Metal Sh...	EA	20	100	80	20	850	1000
<input type="checkbox"/>	MGCIRB...	Circuit B...	EA	8	100	83	17	8	10
<input type="checkbox"/>	COMPO...	Compone...	EA	5	12	7	5	40	50
<input type="checkbox"/>	COMPO...	Compone...	EA		12	12	0	45	50
<input type="checkbox"/>	COMPO...	Compone...	EA		5	5	0	48	50
<input type="checkbox"/>	COMPO...	Compone...	EA	0	5	8	0	0	50
<input type="checkbox"/>	COMPO...	Compone...	EA	0	2	2	0	30	50
<input type="checkbox"/>	COMPO...	Compone...	EA	0	2	2	0	40	50

Figure: The Materials tab of the operation details page

Viewing Operation Instructions and Files

On the **Steps** and **Files** tabs of the operation details page (shown in the screenshots below), operators can:

- View work instructions and job steps for the operation to follow the required sequence, meet specifications, and reduce rework
- Access files related to the operation, such as documents, images, or other reference materials

Acumatica Luis Williams Sign Out

RO AM000118 – Remote Control Door Lock

Selected Operation 10 - Laser metal cutting Next Operation 11 - Assembly (Work Center: WC11)

PRODUCTION MATERIALS **STEPS** FILES

Step	Description	Note
1	Cut 2 details out of a single sheet 20x10, 1mm	Cut sheets sized 2.100 x 3.234 according to specs. Ensure precision, verify dimensions post-cutting, then proceed with further processing. Safety protocols must be followed.
2	Cut 2 details out of a single sheet 50x50, 0.5mm	
3	Cut 1 detail out of a single sheet 20x10, 2mm	Cut sheets sized 2.100 x 3.234 according to specs. Ensure precision, verify dimensions post-cutting, then proceed with further processing. Safety protocols must be followed.

Figure: The Steps tab of the operation details page

Acumatica

RO AM000118 – Remote Control Door Lock

Selected Operation: 10 - Laser metal cutting | Next Operation: 11 - Assembly (Work Center: WC11)

PRODUCTION MATERIALS STEPS **FILES**

Search

File Name	Source	Created On
Door lock metal parts blueprint.jpg	Production Order	13/08/2029 at 4:47 pm
Door lock metal parts blueprint.jpg	Operation	13/08/2029 at 4:47 pm
Instruction on how to cut metal parts.pdf	Operation	13/08/2029 at 4:47 pm

Figure: The Files tab

Viewing Recent Activities

The **Recent Activity** page (shown below) gives Shop Floor Kiosk operators a clear, chronological view of the actions they've performed over the past seven days.

This lets operators:

- View and easily verify their recent activity
- Quickly confirm what they've already reported
- Remember where they left off after an interruption or task switch
- Resume work without rechecking production orders manually

Acumatica Luis Williams Sign Out

Recent Activity

Activities are shown for the past 7 days, starting from April 30, 2025.

Date & Time	Action	Details	Production Nbr.	Operation
May 5, 2025 at 20:00	Clocked In	Started labor time tracking for a producti...	AM000126	0022 - Assembly
May 4, 2025 at 20:06	Clocked Out	Stopped labor time tracking for a producti...	AM000126	0022 - Assembly
May 4, 2025 at 20:04	Issued Materials	Metal Sheet, METALSHEET10x50, 2 ea	AM000126	0021 - Drilling hole...
May 4, 2025 at 20:02	Issued Materials	Metal Sheet, METALSHEET10x50, 5 ea	AM000126	0021 - Drilling hole...
May 4, 2025 at 20:00	Issued Materials	Metal Sheet, METALSHEET10x10, 2 ea	AM000126	0021 Drilling holes...
May 3, 2025 at 20:08	Reported scrap quantity	Custom wooden but, CSTWBTT, Worker'...	AM000126	0021 Drilling holes...
May 3, 2025 at 20:06	Reported completed quantity	Custom wooden but, CSTWBTT, 2 EA	AM000032	0030 Assembly
May 3, 2025 at 20:04	Reported completed quantity	Custom wooden but, CSTWBTT, 5 EA	AM000032	0030 Assembly
May 2, 2025 at 20:10	Reported completed quantity	Custom wooden but, CSTWBTT, 10 EA	AM000032	0030 Assembly
May 2, 2025 at 20:04	Reported completed quantity	Custom wooden but, CSTWBTT, 10 EA	AM000032	0030 Assembly
May 3, 2014 at 20:04	Clocked In	Started labor time tracking for a producti...		

Figure: The Recent Activity page

Limitations

The Shop Floor Kiosk will be enhanced in future releases and its user interface and functionality may change. For this reason, we do not recommend developing customizations for the kiosk at this stage, because future product updates may break your custom solutions.

If a production employee clocks in to or out of an operation using the [Clock Entry](#) (AM315000) or [Multiple Production Clock Entry](#) (AM316000) form, those clock entries must be approved and processed on the [Approve Clock Entries](#) (AM516000) form. These entries are not visible in the Shop Floor Kiosk.

The clock entry forms should not be used for employees who report labor through the Shop Floor Kiosk.

Manufacturing: Support for Purchase Receipt Correction and Cancellation

If you work with high volumes of purchase receipts, you sometimes discover issues only after the receipts have been released. In these cases, you may need to correct errors in the lines of the receipt. In other cases—for instance, if the company doesn't accept the goods—you may want to cancel the receipt.

Acumatica ERP 2025 R1 introduced the ability to correct or cancel released purchase receipts. However, this functionality remained unavailable if the *Manufacturing* feature was enabled on the [Enable/Disable Features](#) (CS100000) form.

In Acumatica ERP 2026 R1, this restriction has been relaxed. You can now use the **Correct Receipt** and **Cancel Receipt** commands on the [Purchase Receipts](#) (PO302000) form—shown below—when you also use the manufacturing functionality.

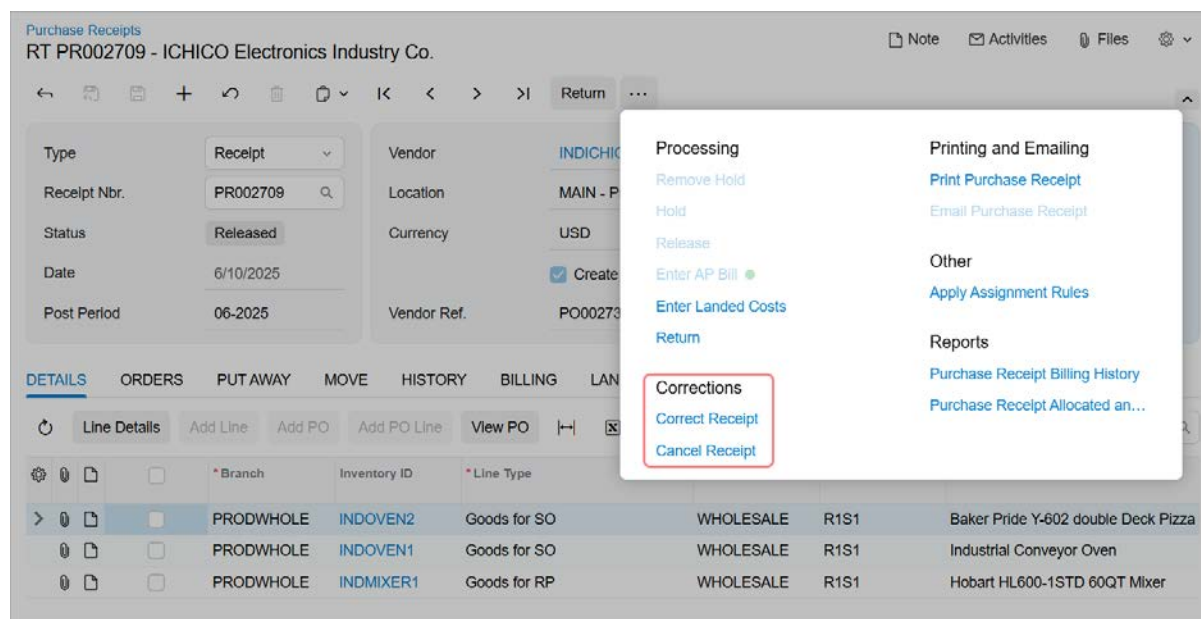


Figure: The Correct Receipt and Cancel Receipt commands



Purchase receipt correction and cancellation are available only if the *Inventory* feature is enabled on the [Enable/Disable Features](#) form.

What's Been Enhanced

This enhancement builds on the correction and cancellation logic introduced in Version 2025 R1. An additional check now ensures that you can't use these commands if at least one receipt line is linked to a production order material.

This approach gives you a clear separation:

- More control and flexibility for non-production receipts
- Strict protection for receipts that affect production orders

Learn More

For more information about receipt correction and cancellation, see [Correcting Purchase Receipts](#).

Manufacturing: Tracking In-Transit Quantities as Planned Supply

When goods are on the road, at sea, or between warehouses, they should still appear in your supply plans and material requirements calculations. You need this visibility to see what's coming, when it's expected to arrive, and how it'll affect your ability to meet demand.

In Acumatica ERP 2026 R1, inventory planning includes **in-transit quantities** as part of **planned supply**, even if the two-step transfer hasn't yet started. This helps you avoid specific challenges that can arise during inter-warehouse inventory transfers:

- Duplicate replenishment orders that inventory planners may create when inventory planning results don't recognize stock already in transit after shipment confirmation
- Unnecessary purchases or panic buying that may occur when the planning system doesn't account for inventory on confirmed transfer orders
- Delayed partial shipments caused by the consolidation of transfer supply records and insufficient visibility into partial fulfillment



This functionality is available only if these features are enabled on the [Enable/Disable Features](#) (CS100000) form:

- *Material Requirements Planning or Distribution Requirements Planning*
- *Multiple Warehouses*

New Capabilities

- Full visibility into incoming inventory
- More accurate planning and forecasting
- Prevention of redundant transfers and purchases

Improved Supply Planning for Inter-Warehouse Transfers

Each time inventory planning is run on the [Regenerate Inventory Planning](#) (AM505000) form, the system recalculates the planned supply for the destination warehouse. The calculation now includes sales orders of the *Transfer* type whose related shipments have the *Confirmed* status, indicating that goods have been dispatched from the source warehouse.

Greater Visibility into the Planned Supply

You can now use the [Inventory Planning Results by Item](#) (AM404000) form, which is shown below, to view detailed information about the planned transfer supply, including in-transit quantities.

Inventory Planning Results by Item

Warehouse Details

Inventory ID *	CONGTEES - Wooden G... <input type="text"/>	Source	Transfer	Safety Stock	200.00
Warehouse *	WHOLESALE - Wholesal... <input type="text"/>	Source Warehouse	RETAIL - Retail Warehouse	Min. Order Qty.	0.00
Qty. On Hand	206.00	Transfer Lead Time	0	Max. Order Qty.	0.00
Base Unit	EA	Lead Time	0	Lot Qty.	0.00

All Records

Type	Promise Date	Related Document	Quantity	Projected On-Hand Qty.	Related Product Document
> Transfer Supply	11/4/2025	Transfer Receipt, PR002712	105.00	311.00	
Sales Order	12/17/2025	SO, SO008494	-1,000.00	-689.00	
Transfer Supply	12/17/2025	TR, SO008495	890.00	201.00	

Figure: A transfer supply document on the Inventory Planning Results by Item form

On this form, you can review transfer supply documents for the destination warehouse to more accurately determine whether the planned supply can meet the demand. These documents include transfer orders, shipments, transfer lines, and transfer receipts. They relate only to shipments with the *Open*, *Confirmed*, and *Completed* statuses.

The promise date for a transfer supply document includes the transfer lead time if the related shipment has the *Open*, *Confirmed*, or *Completed* status. If multiple items are shipped together, the system applies the longest transfer lead time. Accurate promise dates help you optimize resources and deliver on time.

Learn More

For more information about inventory planning, see [Inventory Planning with MRP](#) and [Performing Inventory Planning with DRP](#).

Modern Customer Portal: A Reimagined Experience

Acumatica ERP 2026 R1 introduces the Modern Customer Portal—a reimagining of how your customers can use the portal to interact with your business online. Built on our Modern UI framework, this new portal delivers a streamlined experience and smooth integration with your Acumatica ERP instance.

For brevity, we use *portal users* to refer to your customers' employees—**regardless of their roles**—who use the Modern Customer Portal.



This functionality is available only if the *Modern Customer Portal* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Let's explore what the new portal delivers and how it benefits you.

What This Means for Your Business

With the Modern Customer Portal, you'll save administrative time while giving your customers the ability to handle key interactions with your company:

- A **centralized management approach** means you no longer need to sign in to each customer portal separately. You can set up and maintain all portals from a single Acumatica ERP form.
- **Flexible configuration** lets you tailor each portal to fit your brand and your customers' needs.
- **Role-based access** ensures secure, controlled visibility for portal users without adding complexity.
- A **modern, streamlined interface** reduces support requests, increases satisfaction, and creates a more inviting shopping experience.

Here's how the Modern Customer Portal transforms your workflow.

Managing All Your Portals in One Place

As an Acumatica ERP administrator, you can use the centralized [Portals](#) (SP701000) form, shown below, to create and configure multiple portals **directly in Acumatica ERP**—no need to sign in to each portal individually.

The General Tab

On the **General** tab of the form, you can turn on the availability of multiple categories and select the forms to be visible to portal users (Item 1).

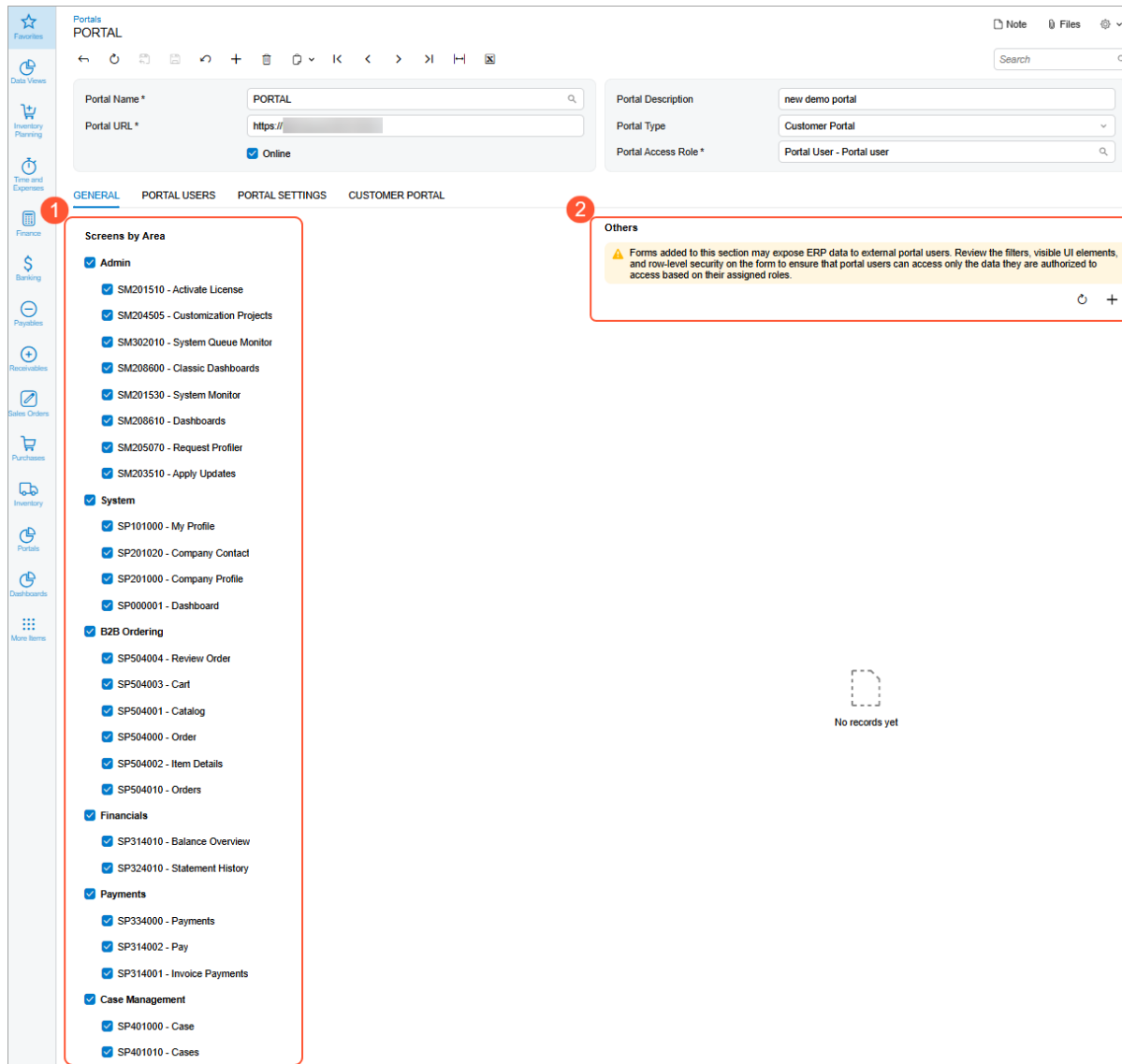



Figure: Selecting categories and visible forms

In the **Others** section (Item 2), you can select additional uncategorized forms that you want to make visible to portal users. These can include **pivot tables, dashboards, or generic inquiry forms** created in Acumatica ERP and published to the portal.

 If you add customized forms to the Modern Customer Portal, you must configure and verify all these forms' filters in Acumatica ERP to prevent the exposure of sensitive customer data. Before publishing the forms, you should ensure that your company's data is not visible to customers and that each customer's data is hidden from other customers and their portal users.

For new forms made visible in the portal, you need to apply the required filtering so that portal users can access only the data authorized for their assigned roles. This includes properly configuring filters, visible UI elements, row-level security, and conditions by the customer's associated business account.

The **Portal Users** tab shows a list of this portal's users, along with each user's roles, email address, business account, and status.

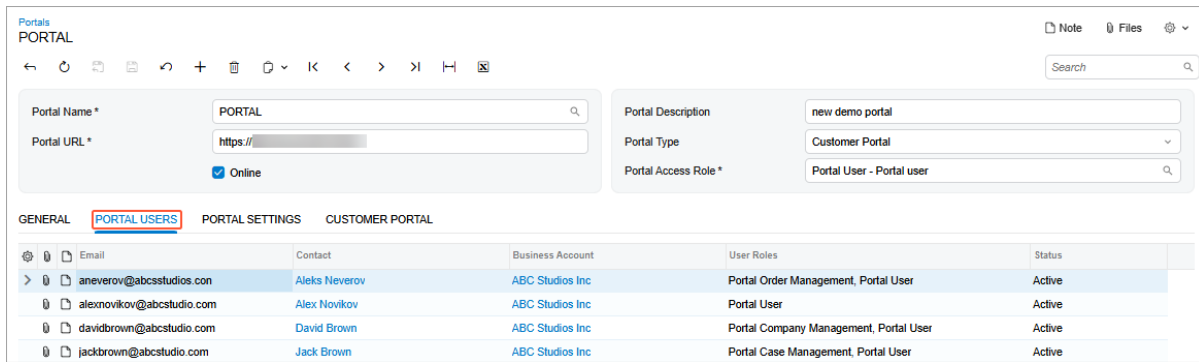


Figure: Viewing the portal users

On the **Portal Settings** tab, you can specify the display and landing page settings to apply consistent branding.

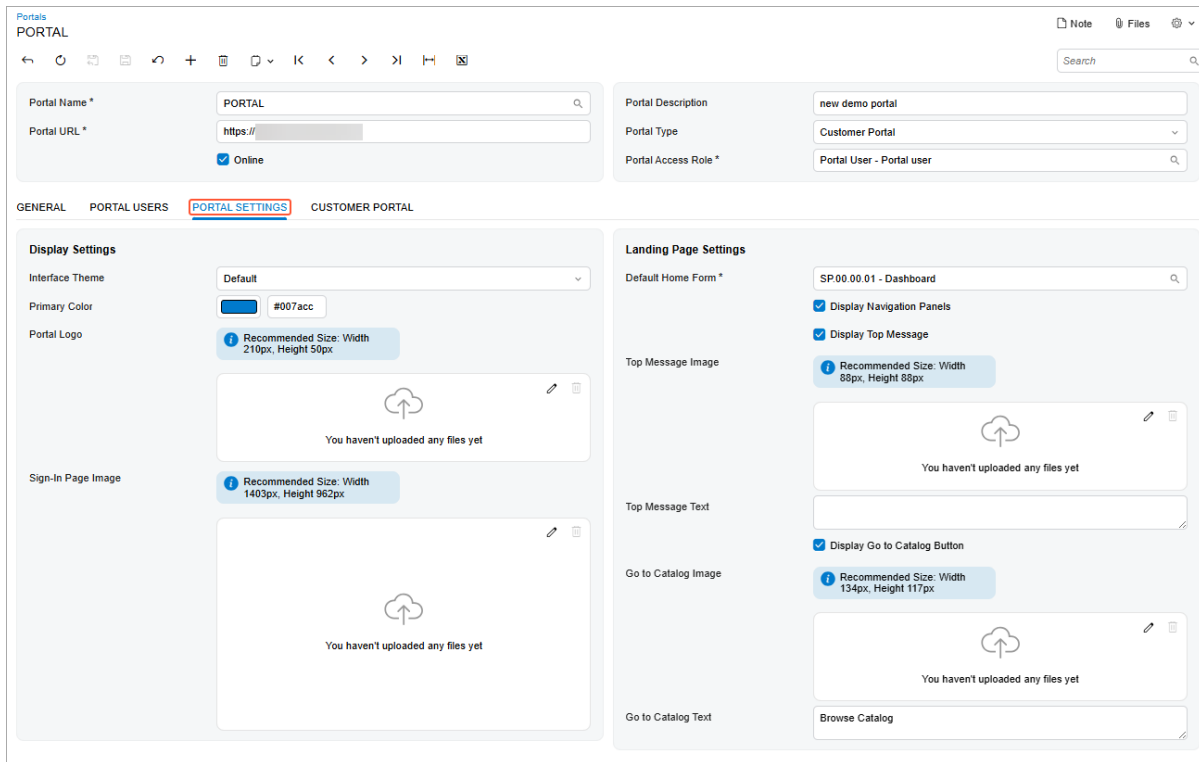


Figure: Display and landing page settings

On the **Customer Portal** tab, you can manage financial, payment, case, and order settings.

Figure: Additional portal settings

After specifying these settings, save your changes to create the portal.

Controlling Users' Access with Ease

By using the smart role-based access model, you can control what each portal user—defined in your system as a *contact*—can see and do in the portal, based on their job responsibilities.

You can manage each portal user's access on the **Access to Portal** tab of the *Contacts* (CR302000) form. In the **User Roles** table (shown below), assign one or more predefined roles that match this user's job duties—giving them access to the right portal forms.

Assigned	Role Name	Role Description
<input type="checkbox"/>	Customer Portal Case Manager	Access to support cases
<input type="checkbox"/>	Customer Portal Company Manager	Access to manage company-level ...
<input type="checkbox"/>	Customer Portal Contact Manager	Access to company contacts and t...
<input checked="" type="checkbox"/>	Customer Portal Financial Manager	Access to financial information, incl...
<input type="checkbox"/>	Customer Portal Manager	Full access for managing orders, c...
<input type="checkbox"/>	Customer Portal Order Manager	Access to the cart, catalog, and or...
<input checked="" type="checkbox"/>	Portal User	Portal user

Figure: Assigning roles to a portal user

Beyond administrative efficiency, the new portal significantly enhances the customer experience.

Starting from a Modern, Comprehensive Home Page

The Modern Customer Portal delivers an updated interface based on the Modern UI. But the new portal isn't just visually appealing—it also provides better performance and greater flexibility.

When portal users sign in, they go to the home page, which gives them the tools and information they need to get started:

- **Browse Catalog** (Item 1 below). This button provides one-click access to the catalog.
- **Current Balance, Overdue and Due Within 7 Days, Unapplied Payments, and Open Cases** (Item 2). These widgets show key financial data at a glance. Clicking any of the first three widgets opens the [Balance Overview](#) (SP314010) form; clicking **Open Cases** opens the [Cases](#) (SP401010) form.
- **Invoices to Be Paid** (Item 3). This list shows invoices and payments with the *Open* status. When the portal user clicks a link with a document's number, a printable version of the document is downloaded to the computer. If the portal user clicks **Pay**, the [Balance Overview](#) form opens, showing invoices and payments with the *Open* status. The portal user can make partial or full payments.
- **Recently Answered Cases** (Item 4). This list shows the most recent cases to which the support team has responded. For each case, the system displays the case number (as a link), the status, the date and time of the latest update, and a preview of the latest message. Clicking the case number opens the case details on the [Case](#) (SP401000) form.
- **Open Orders** (Item 5). In this list, the portal user can view open orders. By clicking any order number, they can jump to the [Order \(SP504000\)](#) form to review the order's details, print it, or even copy all items and quantities to the cart.
- **Recently Ordered Items** (Item 6). Here the portal user can click any previously ordered item to open it in the **Item Details** dialog box, view its details, and add it to the cart. Alternatively, they can click **Add To Cart** to add it directly.

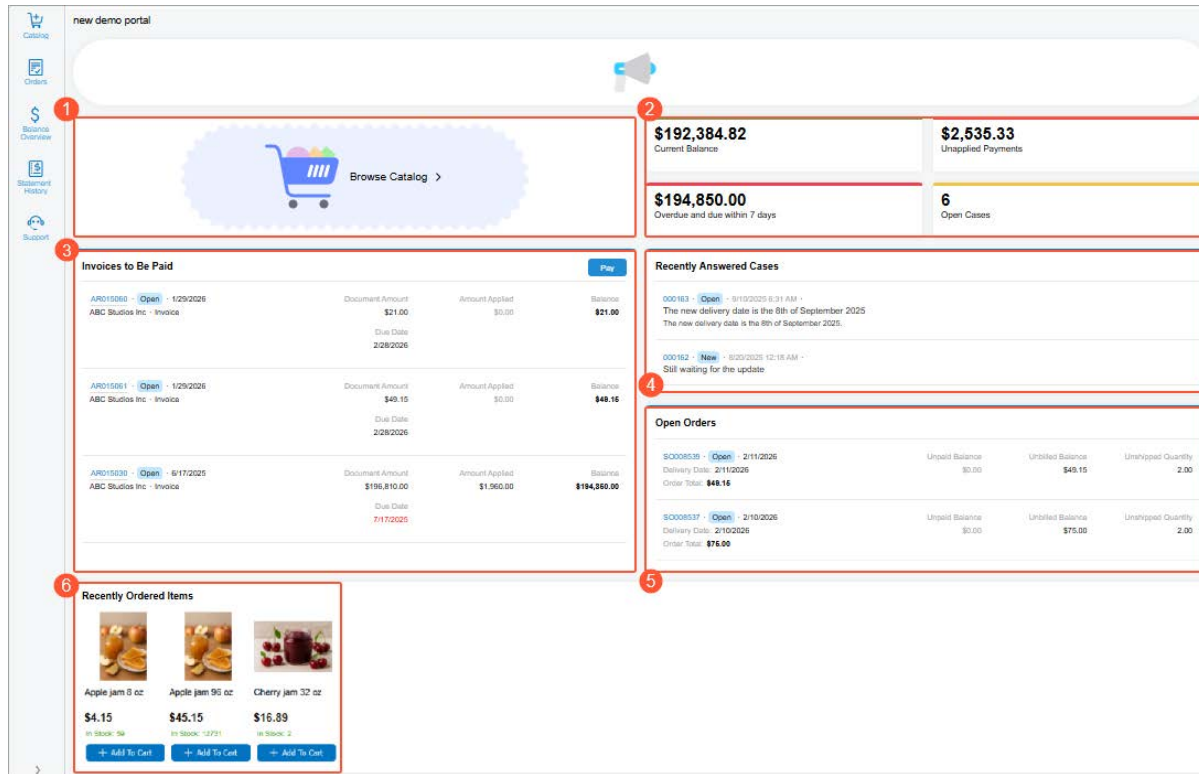


Figure: The portal home page



The precise buttons and widgets each portal user sees may depend on their role or roles.

Shopping with the Enhanced Catalog

A portal user can now browse the catalog in the Modern Customer Portal and purchase products more efficiently. To do this, they add products directly to the cart on the *Catalog (SP504001)* form by clicking the **Add To Cart** button.

The Cart area always appears in the top pane (see below), regardless of which form is open—even when the cart is empty. When items are added, the Cart area instantly shows the updated quantity and total without the page reloading.

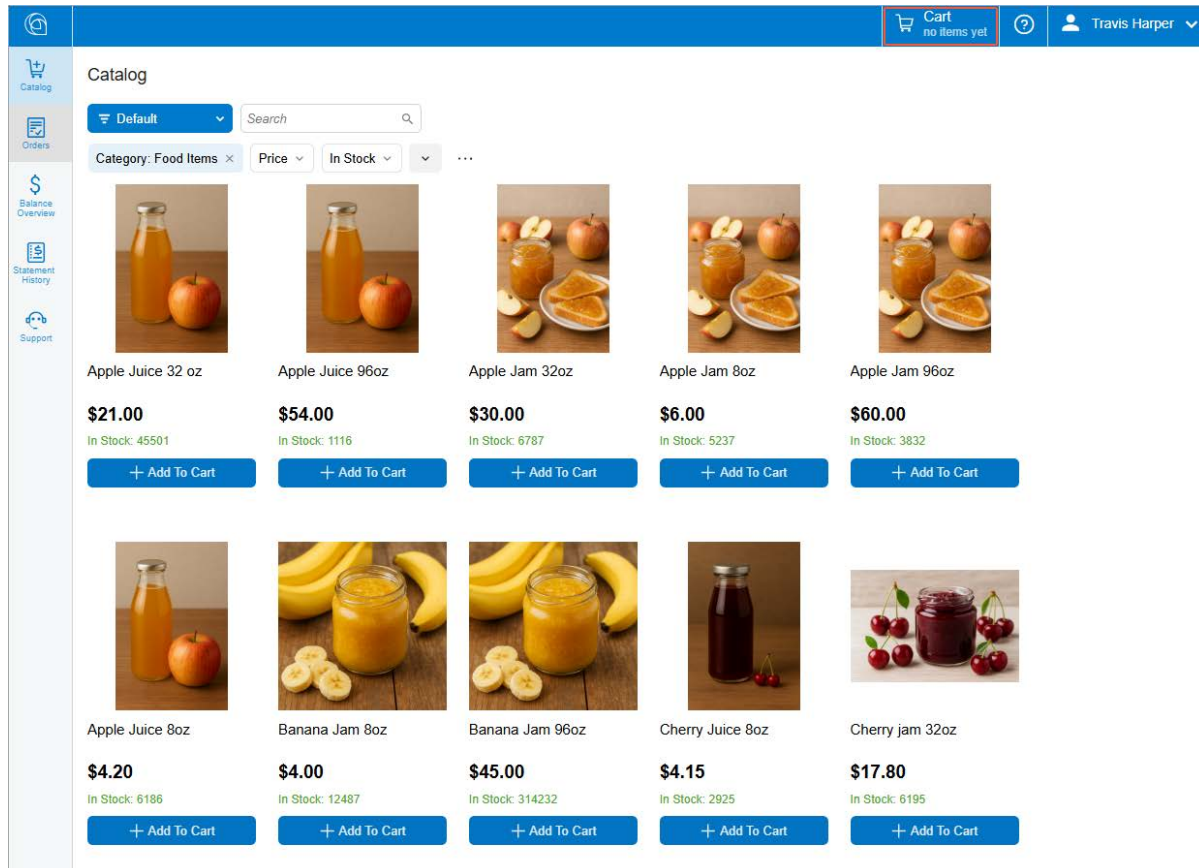


Figure: The new catalog

In addition, the portal user can add products to the cart through the **Item Details** dialog box (see below), which opens when they click the product image in the catalog or in the **Recently Ordered Items** section of the home page. In the dialog box, they can view the item's description, specify additional settings, and add the item to their cart.

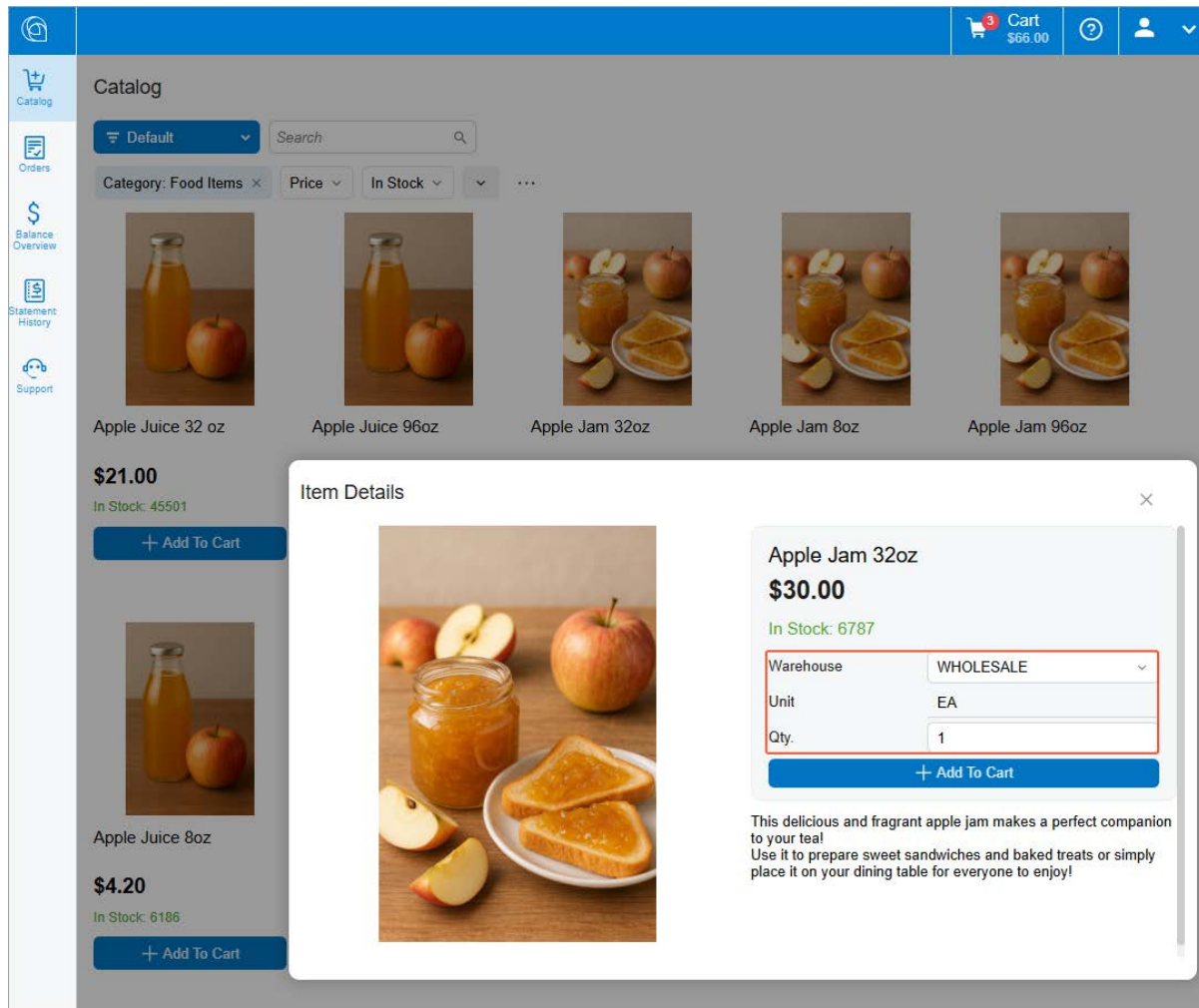



Figure: Item details

In this dialog box, the item quantity to be added is always shown; the portal user can change the default quantity before clicking **Add To Cart**.

The other boxes are shown based on the features enabled on the [Enable/Disable Features](#) (CS100000) form of Acumatica ERP:

- **Warehouse** appears if the *Inventory and Order Management* and *Multiple Warehouses* features are enabled.

 If only one warehouse is selected in the **Visible Warehouses** box on the [Portals](#) (SP701000) form, this warehouse is always used; the warehouse selector doesn't appear.

- **Unit** appears if the *Multiple Units of Measure* feature is enabled.

Paying Invoices and Sales Orders with Credit Cards

In the Modern Customer Portal, a portal user can make payments by using saved or new credit cards directly in the portal.

A portal user can add a credit card on the [Company Profile](#) (SP201000) form by clicking **Add New Record** (Item 1 below) and filling in the **Create New Card** dialog box (Item 2).

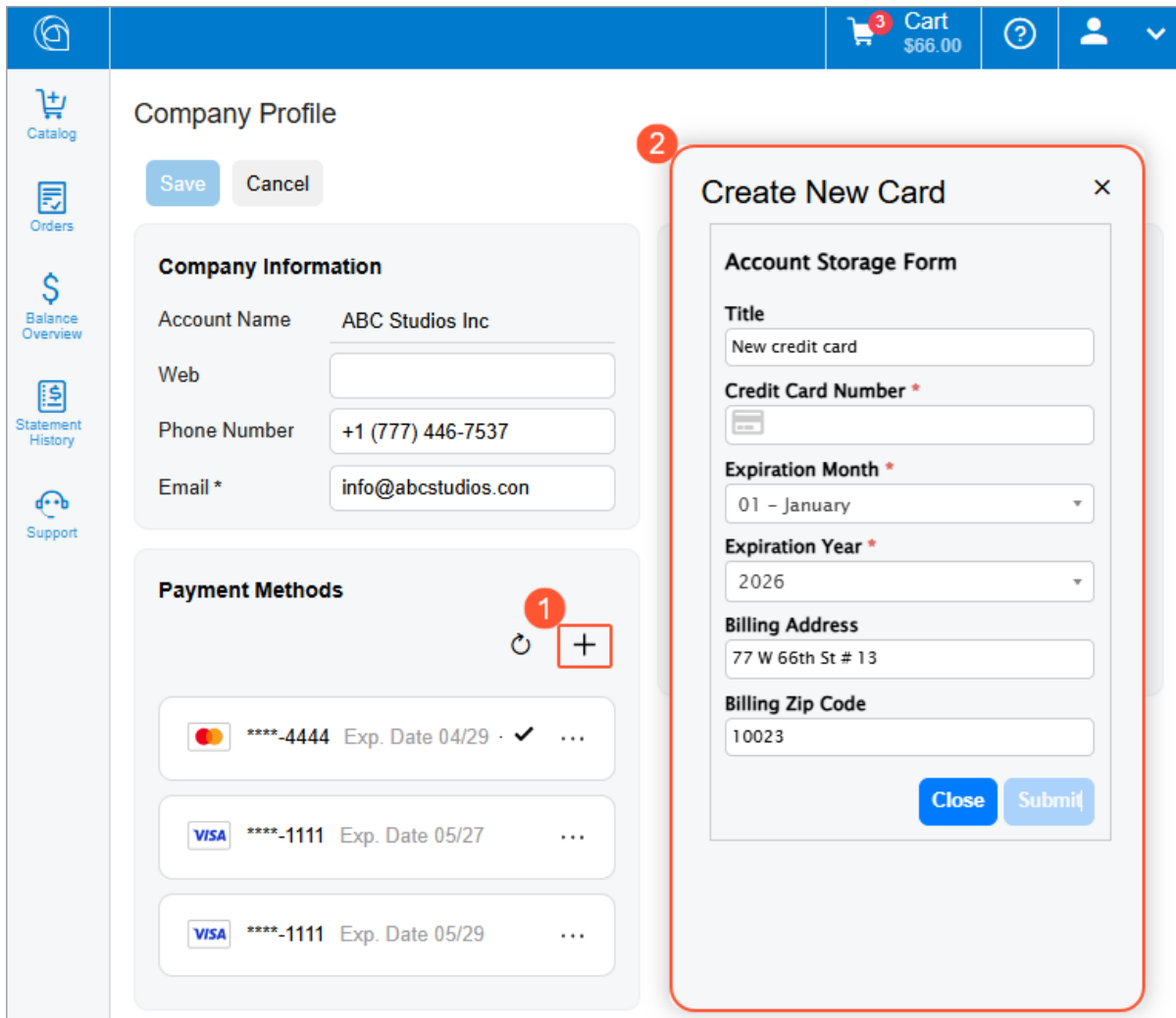


Figure: Creating a credit card in the portal

After the portal user submits the card data, the new card appears in the portal. On the *Review Order (SP504004)* form, they can select the appropriate credit card as the payment method for a new order.

Review Order

Location MAIN Change

Shipping Address Change
 77 W 66th St # 13, New York NY, 10023, US
 Receiving, ABC Studios Inc, +1 (777) 446-7537, info@abcstudios.com

Billing Address Change
 Same as Shipping Address

Shipping Information Change
 Ship Via: FedEx 2 Day - \$95.22
 Shipping Preference: Allow Partial Shipments

Payment Method

****-4444 Exp. Date 04/29 - Default ...
Continue

visa ****-1111 Exp. Date 05/27 ...

visa ****-1111 Exp. Date 05/29 ...

Proceed Without Payment

Add New Card

Order Information
 Customer Order Nbr:
 Description:

Ordered Items

Item	Price	Unit of Measure	Quantity	Discount	Total Price
Apple Jam 32oz	\$30.00	ea	2	0.0%	\$60.00
Apple Jam 8oz	\$6.00	ea	1	0.0%	\$6.00

Order Summary

Subtotal \$66.00
 Discount Total \$0.00
 Freight Total \$95.22
 Tax Total \$0.00
Order Total \$161.22

Place Order

Figure: Credit card payment method on the Review Order form

Managing Financial Documents in One Place

Portal users with the appropriate access rights can work with financial documents and make payments in one place.

On the **All Invoices** tab (Item 1 below) of the [Balance Overview](#) (SP314010) form, they can access invoices (Item 4), credit and debit memos (Items 2 and 3), and overdue charges (Item 5).

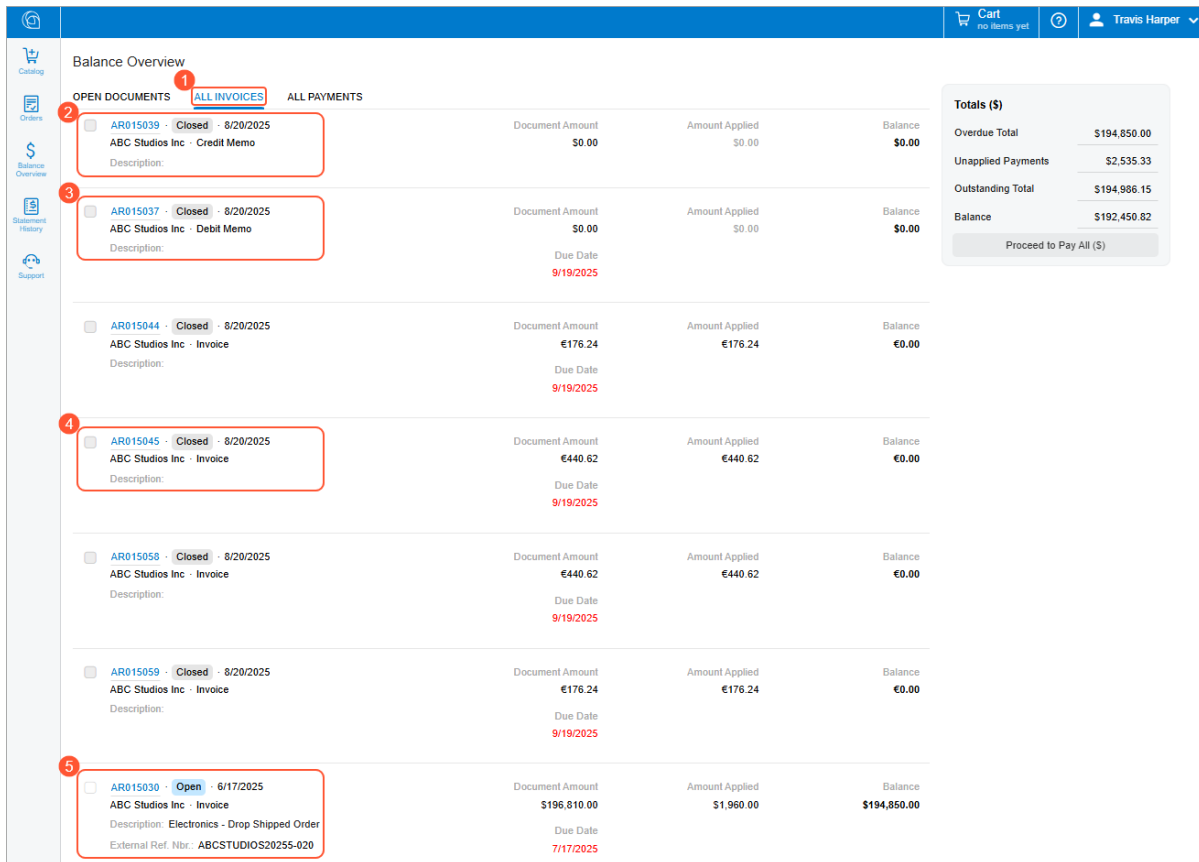


Figure: Financial documents on the Balance Overview form

On the **All Payments** tab (Item 1 below) of the *Balance Overview* (SP314010) form, they can access payments (Item 2) and prepayments (Item 3).

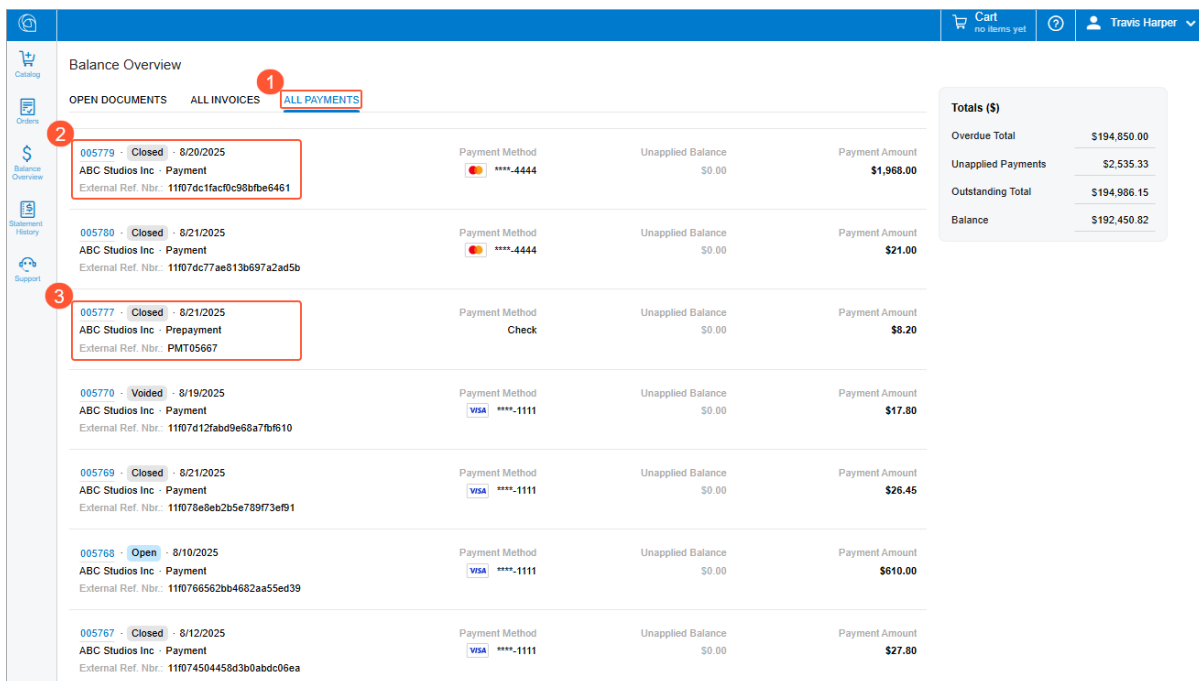


Figure: Payments and prepayments on the Balance Overview form

On the **Open Documents** tab of the *Balance Overview* (SP314010) form, a portal user can initiate **partial or full payments**: They simply select the document or documents to be paid and then click **Proceed to Pay**, as shown below.

The screenshot displays the 'Balance Overview' interface. At the top, there are navigation tabs for 'OPEN DOCUMENTS', 'ALL INVOICES', and 'ALL PAYMENTS'. The main area contains a list of documents with columns for Document Amount, Amount Applied, and Balance. The document AR015030 is selected, indicated by a blue square icon. To the right, a 'Totals (\$)' summary table shows the overall balance and a 'Proceed to Pay All (\$)' button. Below this, a 'Documents Selected' summary shows 1 document selected with a total balance of \$194,850.00, and a 'Proceed to Pay' button is highlighted with a red box.

Document ID	Date	Description	Document Amount	Amount Applied	Balance
005783	8/21/2025	ABC Studios Inc - Payment	-\$23.03	-\$20.29	-\$2.74
005784	8/21/2025	ABC Studios Inc - Payment	-\$2.74	-\$2.41	-\$0.33
005785	8/21/2025	ABC Studios Inc - Payment	-\$0.33	-\$0.29	-\$0.04
005786	8/21/2025	ABC Studios Inc - Payment	-\$42.00	\$0.00	-\$42.00
005789	8/21/2025	ABC Studios Inc - Payment	-\$506.49	\$0.00	-\$506.49
005778	8/20/2025	ABC Studios Inc - Payment	-\$128.40	-\$8.40	-\$120.00
005768	8/10/2025	ABC Studios Inc - Payment	-\$610.00	\$0.00	-\$610.00
AR015030	8/17/2025	ABC Studios Inc - Invoice	\$196,810.00	\$1,960.00	\$194,850.00

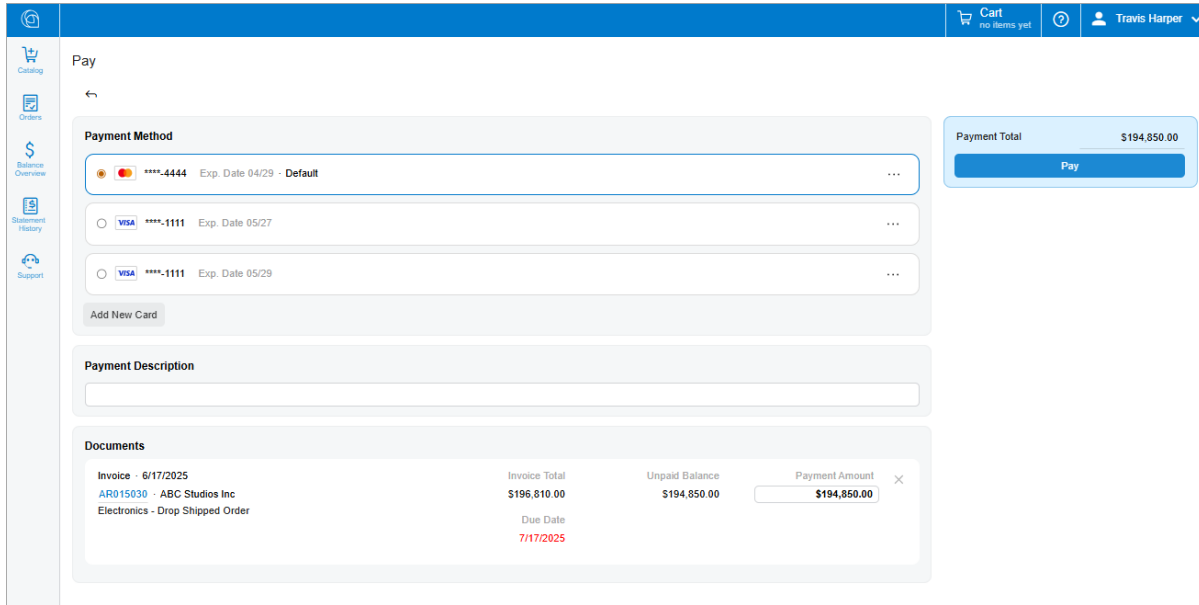
Totals (\$)	
Overdue Total	\$194,850.00
Unapplied Payments	\$2,535.33
Outstanding Total	\$194,986.15
Balance	\$192,450.82

Documents Selected	
Documents Selected	1
Total Balance Selected	\$194,850.00

Figure: Making a payment from the Balance Overview form

The system opens the *Pay* (SP314002) form, where the portal user can complete the payment.

Figure: Completing a payment on the Pay form



Finding Financial Information Faster

On the *Balance Overview* (SP314010) form, a portal user can view the relevant documents without switching pages. They can use intuitive tabs (Item 1 below) to view open documents, all invoices, or all payments. A Search box (Item 2) and filters (Item 3) also help them find the documents they need.

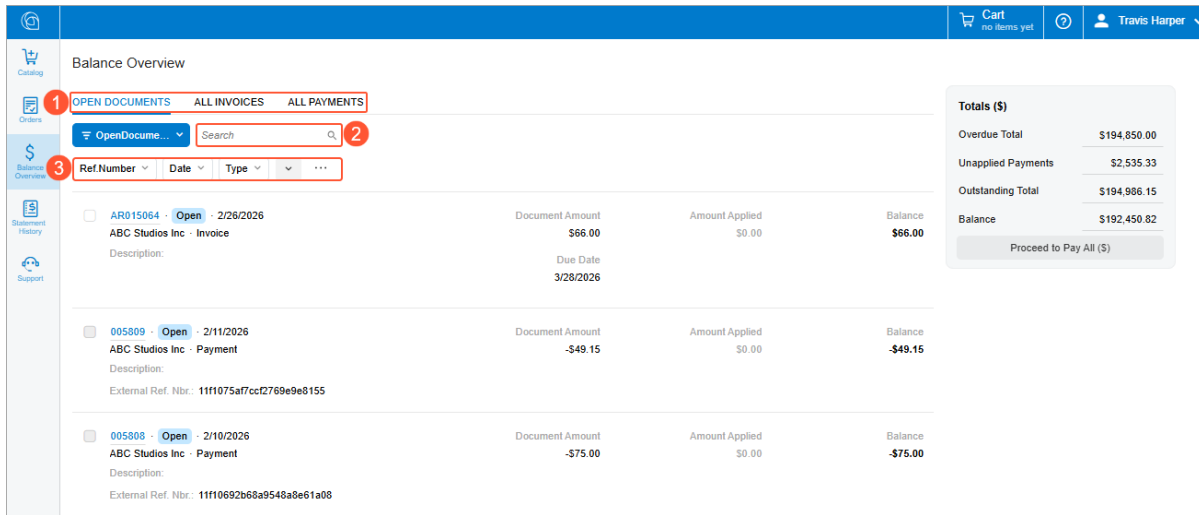


Figure: Searching capabilities on the Balance Overview form

Similarly, on the *Orders* (SP504010) form, a portal user can use tabs, filters, and a Search box to view orders with the *Unpaid* and *Open* statuses—or to view all orders in the system.

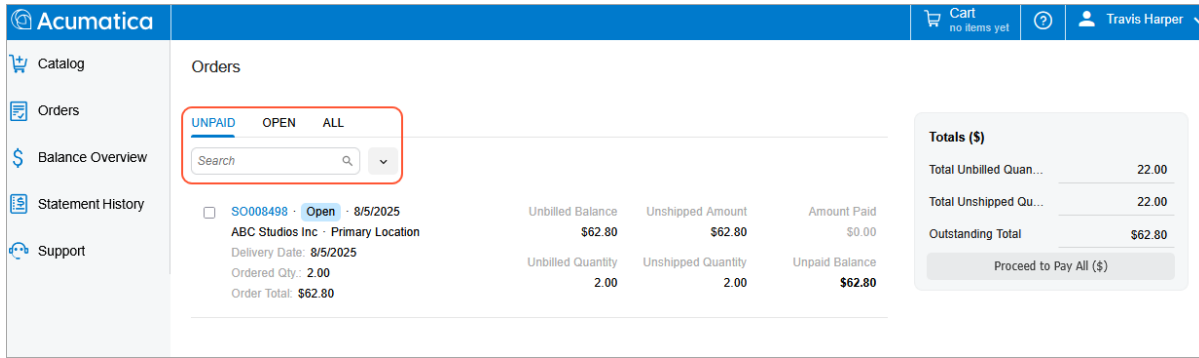


Figure: Finding orders easily

Reviewing Payment, Shipment, and Tracking Details in One Place

The Order (SP504000) form also provides a central place for a portal user to review the payment or payments applied to any order (Item 1 below), check the shipments created for the order (Item 2), and find their tracking numbers (Item 3).

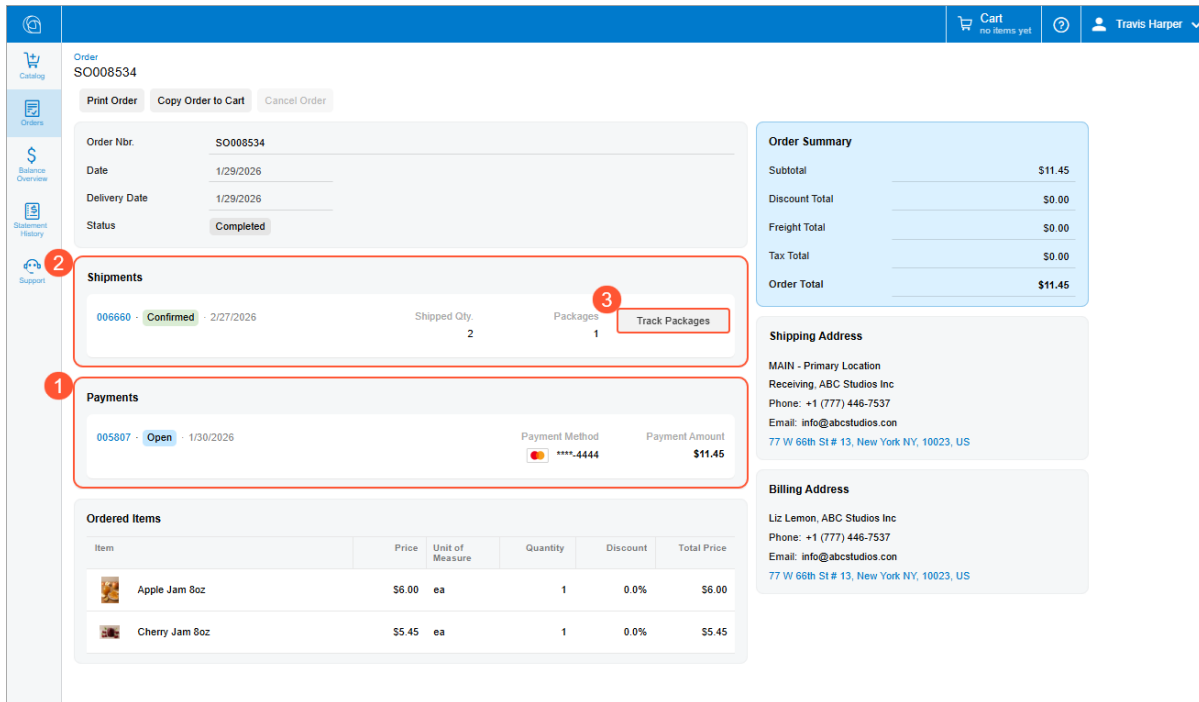


Figure: Reviewing order details on the Orders form

Creating and Reviewing Cases

The Cases (SP401010) form, where portal users create cases, is integrated with the case management capabilities of Acumatica ERP.

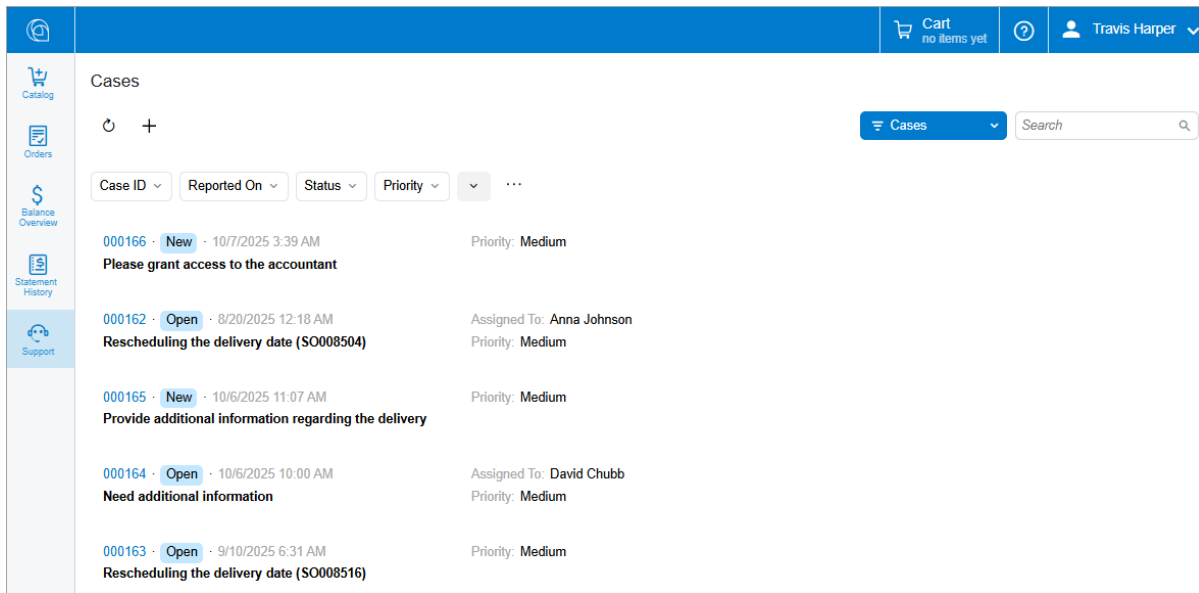


Figure: Cases created in the portal

On the [Case](#) (SP401000) form, a portal user can create and submit a case to the Acumatica ERP support team (Item 1 below), check the status of any case (Item 2), and use messages to communicate within the case (Item 3). The case records are shared and visible in both Acumatica ERP and the Modern Customer Portal.

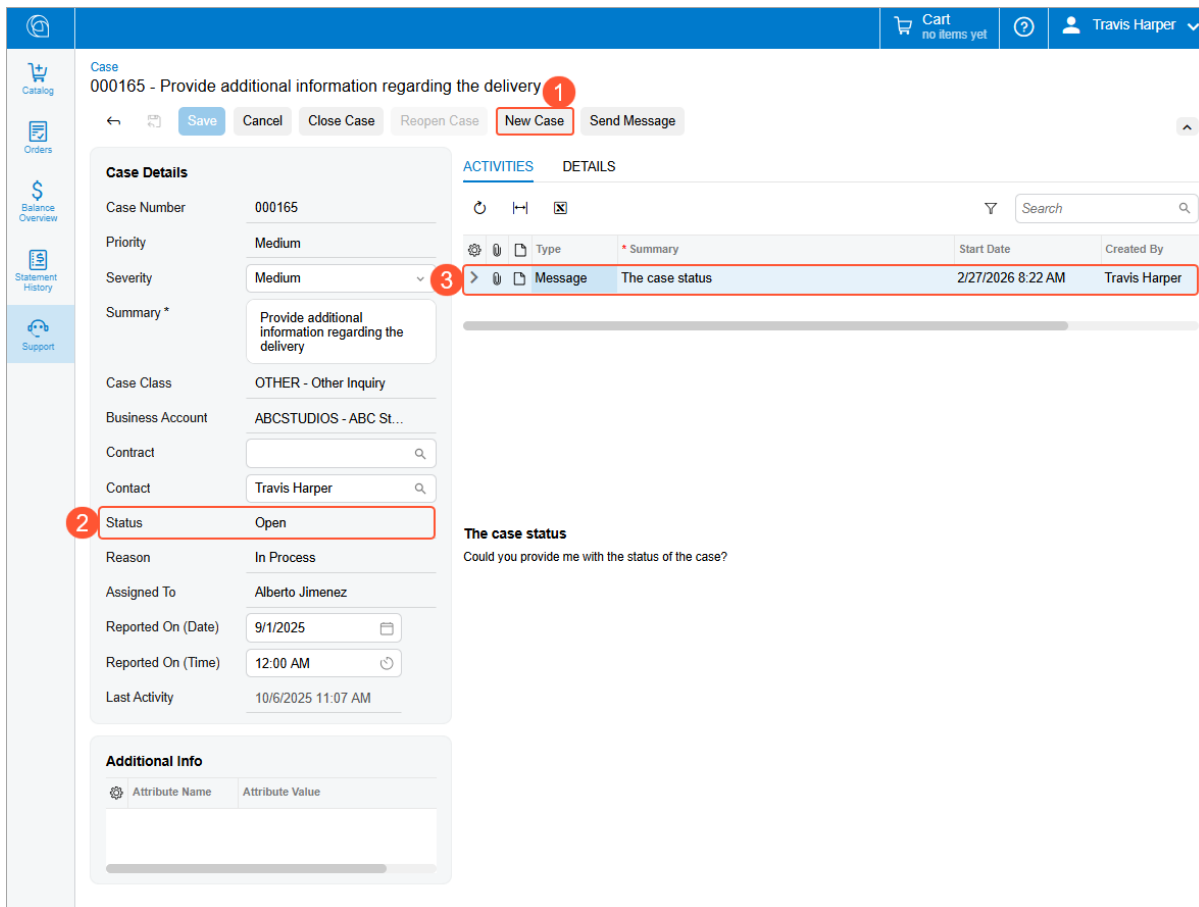


Figure: Case form



This functionality is available only if the *Case Management* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Limitations

1. The Modern Customer Portal doesn't currently support adding any customized forms, dashboards, generic inquiries, and pivot tables from **within** the portal. You can add these forms to the Modern Customer Portal only from Acumatica ERP.
2. Administrators can perform system-wide form configuration only on the *Catalog (SP504001)* form. On other portal forms, this capability is not supported because the administrator is not linked to the customer account and thus can't access customer data (order details, financial data, and cases).
3. Configurable items are not supported in the Modern Customer Portal.



Future releases will bring changes and improvements to the Modern Customer Portal forms and functionality. Additional enhancements are planned for future releases.

Key Benefits

For administrators:

- Centralized portal management reduces setup and maintenance time.
- Role-based access and predefined portal roles ensure security while simplifying user management.
- You can apply consistent branding across all customer touchpoints.

For your customers:

- A streamlined catalog and cart experience makes browsing and ordering faster.
- Integrated payments let portal users manage and complete all their payments in one place.
- Enhanced search capabilities help portal users find what they need quickly.
- Self-service capabilities empower portal users and reduce reliance on the support staff.
- The modern, responsive design improves usability across devices.
- Simplified navigation reduces the learning curve.

Learn More

For more details, see [Modern Customer Portal for Administrators](#) and [Modern Customer Portal for Users](#).

Payroll: Qualified Overtime Compensation Report

To help you comply with IRS Notice 2025-69, Acumatica ERP 2026 R1 now provides the *OBBA-Qualified Overtime Compensation (PR649005)* report. You can find this report in the **Payroll** workspace under the **Annual Reports** category.

The report calculates overtime hours that qualify under the Fair Labor Standards Act (FLSA) for all non-exempt employees, including both hourly workers and salaried staff. It estimates the premium portion of the FLSA overtime pay for these hours based on the actual overtime pay earned during the FLSA workweek, in accordance with IRS Notice 2025-69. The report supports only Methods B and D described in the notice.

You can share the premium amounts from this report with employees to help them complete Schedule 1-A (Form 1040).

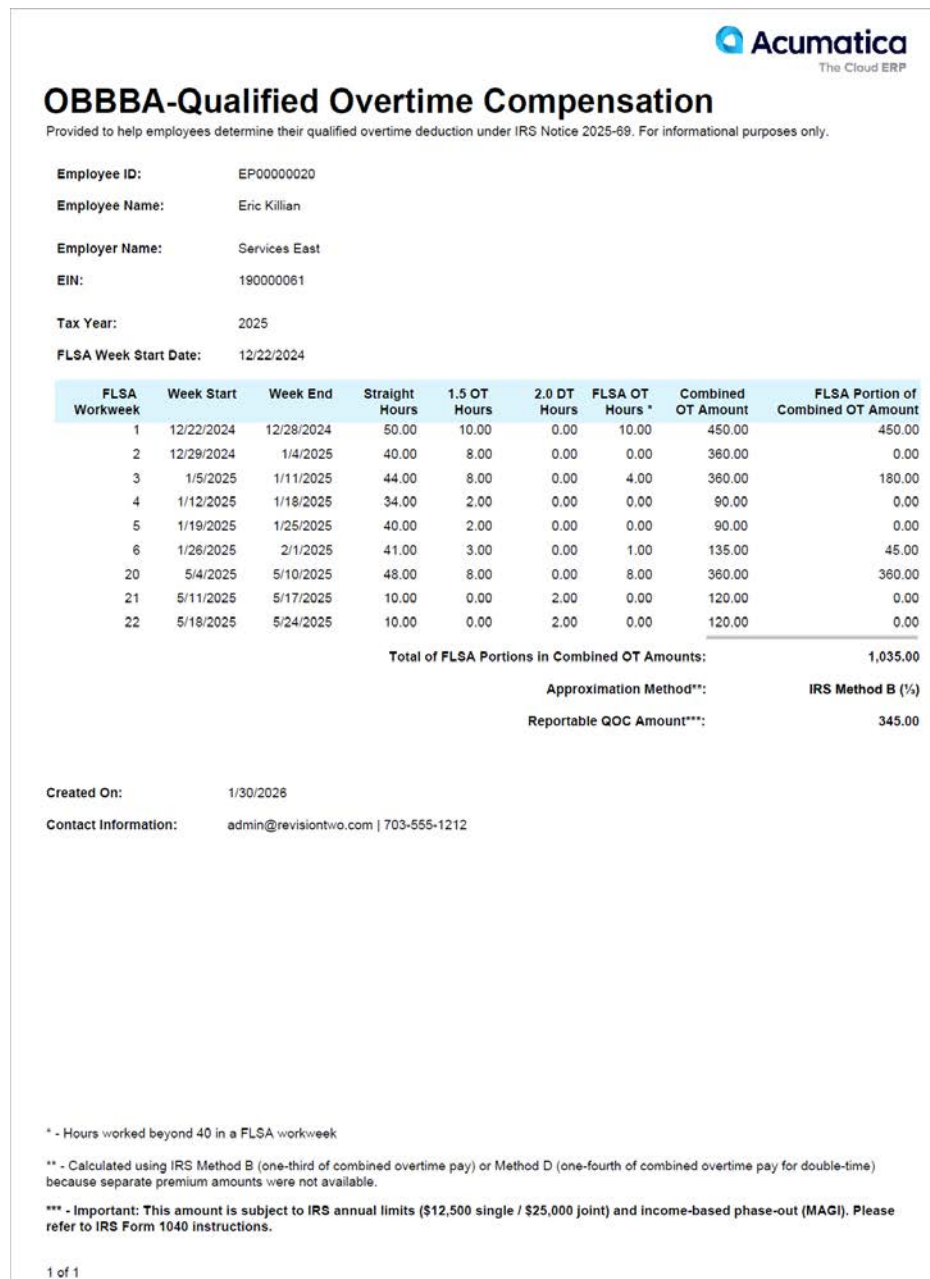


Figure: The Qualified Overtime Compensation report

Payroll: Support of Canada's Employment Insurance

Canada's Employment Insurance (EI) program offers reduced premium rates for eligible employers. By providing short-term disability or wage-loss insurance that meets the Canada Revenue Agency (CRA) requirements, you can qualify for lower EI contributions. This means real cost savings, better cash flow, and strong risk management practices.

Acumatica ERP 2026 R1 now supports this program, making it easy to take advantage of reduced EI rates wherever they apply.



This functionality is available if the *Canadian Payroll* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Assigning CRA Payroll Account Numbers

To start configuring EI premium rates, you assign CRA payroll account numbers to your companies and branches. You can assign multiple CRA payroll accounts to each entity. You can also assign the same CRA payroll account to multiple entities.

You assign CRA payroll account numbers **at the company level** if the company doesn't file taxes by branch—that is, if the **File Taxes by Branch** check box is cleared on the **Company Details** tab of the [Companies](#) (CS101500) form.

For these companies, add the applicable CRA payroll account numbers on the **Canadian Tax Reporting** tab of the [Companies](#) form, as shown below.

Select each of the following check boxes for one of the CRA payroll accounts:

- **Set as Default** to make the system assign the EI premium rate associated with this CRA payroll account to all employees of the company who do not have an EI premium rate specified
- **T4A** to use the account by default for T4A forms

These default CRA payroll accounts will be used for legacy paychecks created in earlier versions of Acumatica ERP that do not have a CRA payroll account assigned, ensuring these paychecks are linked appropriately for reporting purposes.

Companies
PRODUCTS - Revision Two Products Note Files (2) ⚙

Company ID * PRODUCTS
Company Name * Revision Two Products
Company Type With Branches Requiring Balancing

Status Active

COMPANY DETAILS BRANCHES EMPLOYEES LEDGERS **CANADIAN TAX REPORTING** TAXES VISUAL APPEARANCE COMPANY GROUPS

CRA
Transmitter Rep. ID
T4 Reporting Contact

RL1
Identification Number
File Number
Quebec Enterprise Number
Quebec Transmitter Number

* CRA Payroll Account Number	T4A	Set as Default
> 123456789RP0001	<input type="checkbox"/>	<input checked="" type="checkbox"/>
123456789RP0002	<input type="checkbox"/>	<input type="checkbox"/>
123456789RP0003	<input type="checkbox"/>	<input type="checkbox"/>
123456789RP0004	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure: A company's CRA payroll account numbers

You assign CRA payroll account numbers **at the branch level** if the company files taxes by branch and the company branches require balancing—that is, if both of these conditions are met on the [Companies](#) form:

- The company type is *With Branches Requiring Balancing*.
- The **File Taxes by Branch** check box is selected on the **Company Details** tab.

For the branches of this company, add the applicable CRA payroll account numbers on the **Canadian Tax Reporting** tab of the [Branches](#) (CS102000) form, as shown below. Select the **Set as Default** check box for one of the CRA payroll accounts. The system will assign the EI premium rate linked to that CRA payroll account to all employees of the branch who do not have an EI premium rate specified. Select the **T4A** check box for one of the CRA payroll accounts to use it as the default for T4A forms.

Branches
PRODRETAIL - Products Retail Note Files (1) ⚙

Branch ID * PRODRETAIL
Branch Name * Products Retail
Company PRODUCTS - Revision Two Products

Active

BRANCH DETAILS DELIVERY SETTINGS EMPLOYEES LEDGERS GL ACCOUNTS **CANADIAN TAX REPORTING** 1099 SETTINGS VISUAL APPEARANCE

CRA
Transmitter Rep. ID
T4 Reporting Contact
Information Returns Account ...
T5018 Year Type

RL1
Identification Number
File Number
Quebec Enterprise Number
Quebec Transmitter Number

* CRA Payroll Account Number	T4A	Set as Default
> 123456789RP0001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure: A branch's CRA payroll account numbers

Configuring EI Premium Rates

Now that you've associated CRA payroll account numbers with companies and branches, you specify each account's EI premium rate on the **EI Premium Rates** tab of the [Tax Maintenance](#) (PR208000) form. Only one rate can be specified per CRA payroll account.

* Rate Name	* CRA Payroll Account Number	* Employer's EI Premium Rate (%)
Service	123456789RP0001	1.300
Sales	123456789RP0002	1.250
Office	123456789RP0003	1.200
Part-Time	123456789RP0004	1.400

Figure: EI premium rates for CRA payroll account numbers

When you save EI premium rates on the [Tax Maintenance](#) form, the system assigns them to employees who have no EI premium rate specified on the **Tax Settings** tab of the [Employee Payroll Settings](#) (PR203000) form. The system uses the default CRA payroll account of the employee's branch or corresponding company to determine the EI premium rate. You can override this rate by selecting the needed EI rate name in the row with the *Employer's EI Premium Rate* setting.

Employee ID * EP00000005 - Martin Bernia

Employee Name Martin Bernia

Active

GENERAL EMPLOYMENT HISTORY **TAX SETTINGS** TAXES COMPENSATION DEDUCTIONS AND BENEFITS PAID TIME OFF PAYMENT GL ACCOUNTS

Name	Additional Information	Company Notes	State	Value	Used for Tax Calculation	Used for Government Reporting	Form/Box
Employer's EI Premium Rate	For companies that are granted lower Employment Insurance tax rates.		CAN	Office	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Figure: The EI premium rate specified for an employee

Specifying the EI premium rate for each employee is required. Without this setting, the employee's paychecks can't be calculated.

Processing Paychecks

Now that you've performed the configuration steps described above, newly created employee paychecks correspond to the CRA payroll account number linked to the employee's EI premium rate specified on the [Employee Payroll Settings](#) (PR203000) form.

When an employee's paycheck is created, the branch selected for the paycheck on the **Financial** tab of the [Paychecks and Adjustments](#) (PR302000) form must use the same CRA payroll number as the EI premium rate specified for the employee on the [Employee Payroll Settings](#) form. Changing the branch affects only GL transactions.

To pay an employee using a different CRA payroll account number within the same company, update the employee's payroll settings and specify the EI premium rate that corresponds to the required CRA payroll account.

To pay an employee from a different company, you must create a new employee record and assign it to the appropriate branch. This ensures that Canada Pension Plan (CPP) and EI maximums are tracked separately for each business entity.

Generating T4 Forms

You generate T4 forms by specifying the needed selection criteria on the [Prepare Tax Forms](#) (PR502000) form, including the following:

- **CRA Payroll Account Number:** The CRA payroll account for which you want to prepare T4 forms (shown below).
- **Legal Entity for Payroll Tax Reporting:** The company or branch whose name and address appear on the T4 forms as the employer's name and address (also shown below). Entities are listed only if they're associated with the selected CRA payroll account.

To view the generated forms, you must have access to all companies and branches associated with the selected CRA payroll account. If you don't have access to some of these entities, the T4 forms generated (or to be generated) for them will be hidden from the table. You will also not be able to prepare the tax forms, the **Prepare** command will be unavailable.

The screenshot shows the 'Prepare Tax Forms' interface. On the left, there are input fields for 'Tax Form' (T4), 'Year' (2025), 'CRA Payroll Account Number' (123456789RP0001), and 'Legal Entity for Payroll Tax Reporting' (PRODUCTS - Revision Two Products). Below these is a table of employees with columns for Employee ID, Employee Name, Branch, Pay Group, Published From, Document Type, and Batch ID. The table lists five employees: Maxwell Baker (PRODRETAIL, MONTHLY), Layla Beauvoir (PRODRETAIL, BIWEEKLY), Martin Bernia (PRODRETAIL, SEMIMONTHLY), Todd Bloom (PRODRETAIL, CUSTOM), and Pam Brawner (PRODRETAIL, WEEKLY). On the right, a preview of a T4 form is shown, displaying the employee's information and tax details.

Figure: Generating T4 forms for employees

During the generation of T4 forms, if the system processes paychecks created in previous versions of Acumatica ERP that do not have a CRA payroll account associated with them, it uses the default CRA payroll account of the company or branch. This is the account with the **Set as Default** check box selected on the **Canadian Tax Reporting** tab of the [Branches](#) (CS102000) or [Companies](#) (CS101500) form.

This ensures that legacy paychecks are processed correctly.



If no default CRA payroll account is specified, legacy paychecks will appear in a T4 batch for all CRA payroll accounts linked to the company or branch. This may result in the T4 form being generated for each CRA payroll account.

Changes to Other Forms

On the [Batch for Submission](#) (PR304000) form, you can open a batch created for a CRA payroll account number only if you have access to all the companies and branches associated with this CRA payroll account.

The new **CRA Payroll Account Number** box now appears on these inquiry forms and reports:

- [Employee Taxes](#) (PR4030P3)
- [Tax Form History](#) (PR3040PL)
- [Payroll Summary](#) (PR641012)
- [Taxes by Code](#) (PR641068)
- [Taxes by Paycheck](#) (PR641070)
- [Taxes by Employee](#) (PR641067)

You use this box to display data for only the paychecks associated with the selected CRA payroll account. For legacy paychecks created in earlier versions of Acumatica ERP that do not have a CRA payroll account assigned, filtering by company or branch continues to be used.

Feature Highlights

Acumatica ERP now supports Canada's Employment Insurance (EI) program. You can assign CRA payroll account numbers to your companies and branches, define EI premium rates for each CRA payroll account, and apply those rates to eligible employees. You can also generate T4 forms, filter inquiries, and create reports for specific CRA payroll account numbers, making compliance and reporting easier and more accurate.

Payroll: T4 Batch Summary Report

Acumatica ERP 2026 R1 introduces a new T4 Batch Summary report that brings greater clarity and confidence to year-end payroll processing. This report consolidates employment income, deductions, and CRA contribution totals from all employee T4 slips into a single easy-to-read summary. This format makes it simple to review and validate your results at a glance.

Previously, these totals were available only in the T4 XML file. Now you can access them in a readable format that supports proactive payroll management. You can run T4 batches throughout the year to confirm annual totals, and better forecast CRA payments. This visibility helps you reconcile amounts and prepare year-end filings.



This functionality is available if the *Canadian Payroll* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Creating and Downloading the T4 Batch Summary Report

First, you create a T4 batch on the [Prepare Tax Forms](#) (PR502000) form.

Then you open the batch on the [Batch for Submission](#) (PR304000) form and click **Download T4 Batch Summary** on the More menu, as shown below.

The system downloads the T4 Batch Summary report for the batch as an Excel file named T4 Batch Summary followed by the batch identifier.

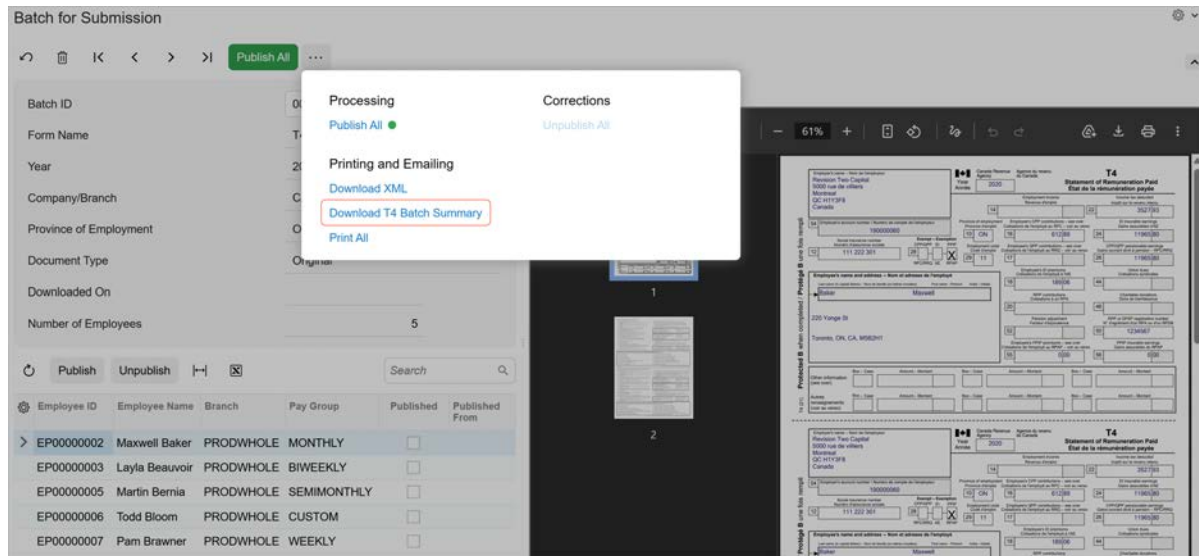


Figure: Downloading the T4 Batch Summary report

Platform: DAC Browser Improvements

In Acumatica ERP 2026 R1, the DAC Browser has been improved as follows:

- Customized and extended DACs are now marked with context-specific tags
- Warnings are displayed for obsolete and internal DACs

The improvements make it easier for you to understand which DACs to use by distinguishing between out-of-the-box extensions and external customizations,.

Tags for Extended and Customized DACs

Previously, all extended DACs were marked with the **Customized** tag regardless of where the extension is located: in the out-of-the-box Acumatica ERP code or in an external customization. In Acumatica ERP 2026 R1, new tags have been added to the DAC Browser:

- DACs that are extended within original Acumatica ERP code have the **Extended** tag. The fields that are defined in the DAC extension in the original Acumatica ERP code are marked with the **Extension** tag.
- DACs that are extended in a customization project have the **Customized** tag. The fields that are defined in the DAC extension of a customization project are marked with the **Customization** tag.

An example of the new tags is shown below.

The screenshot displays the DAC Schema Browser interface. On the left, a search bar and a list of DACs are visible. The main area shows the details for the **SOOrder** DAC, which is marked with the **Extended** tag. The details include the Display Name (Sales Order), Namespace (PX.Objects.SO), Primary Screen (Sales Orders (SO301000)), and Customization (BCSOOrderExt (PX.Commerce.Objects.dll), FSxSOOrder (PX.Objects.FS.dll), ShopifyDraftOrdersSOOrderExt (PX.Commerce.Shopify.dll), SOOrderExtCarriersPXExt (PX.ExternalCarriersHelper.dll), SOOrderPayLink (PX.Objects.dll)).

The **Summary** section states: "Represents sales order and transfer order documents." The **Remarks** section states: "The records of this type are created and edited on: The Sales Orders (SO301000) form (corresponds to the graph) The Process Orders (SO501000) form (corresponds to the graph) The Print/Email Orders (SO502000) form (corresponds to the graph)".

The **Fields** section shows a table with the following data:

Name	Type
OrderNbr	nvarchar(15)
OrderType	char(2)
ActiveOperationsCnt	int
AllowModifyingItems	bit
AllowsRequiredPrepayment	bit
Approved	bit
ApprovedCredit	bit
ApprovedCreditAmt	decimal(19, 4)
ApprovedCreditByPayment	bit
ARDocType	nchar(3)
ArePaymentsApplicable	bit

Figure: A DAC marked with the Extended tag

Warnings for Obsolete and Internal DACs

In Acumatica ERP 2026 R1, the DAC Browser displays a warning for a DAC:

- If a DAC has been marked as obsolete and its use is strongly discouraged
- If a DAC has been marked with the *PXInternalUseOnly* attribute (meaning that it can be used only by Acumatica developers)

These warnings improve visibility and help you understand which DACs to use.

Learn More

For more details about DAC browser, see [DAC Schema Browser](#).

Platform: Enhanced Meter Widget Configuration

In Acumatica ERP 2026 R1 the configuration of **Meter** widgets has become easier and simpler. Also we have tweaked how the alarm range coloring is applied.

Simpler Configuration of Levels

In previous versions, you could only specify the exact values for the **Normal Level** and **Alarm Level** settings in the **Widget Properties** dialog box. Now you can explicitly specify the values for the **Minimum** and **Maximum** levels and add any number of target values between them (shown below).

The screenshot shows the 'Widget Properties' dialog box with the following configuration:

- Caption:** Invoices Awaiting Payments
- Inquiry Screen *:** SO Invoices for Last 12 Months
- Refresh Widget:** Every 30 Min
- Dashboard Parameters Mapping:** Branch
- Filter:** Status = Open
- Appearance:**
 - Field to Aggregate *: Reference Nbr.
 - Aggregate Function: Count All
 - Minimum:** Teal, Fixed Value, 0
 - Target 1:** Teal, Fixed Value, 10
 - Target 2:** Yellow, Fixed Value, 20
 - Maximum:** Red, Percent of Target 2, 125

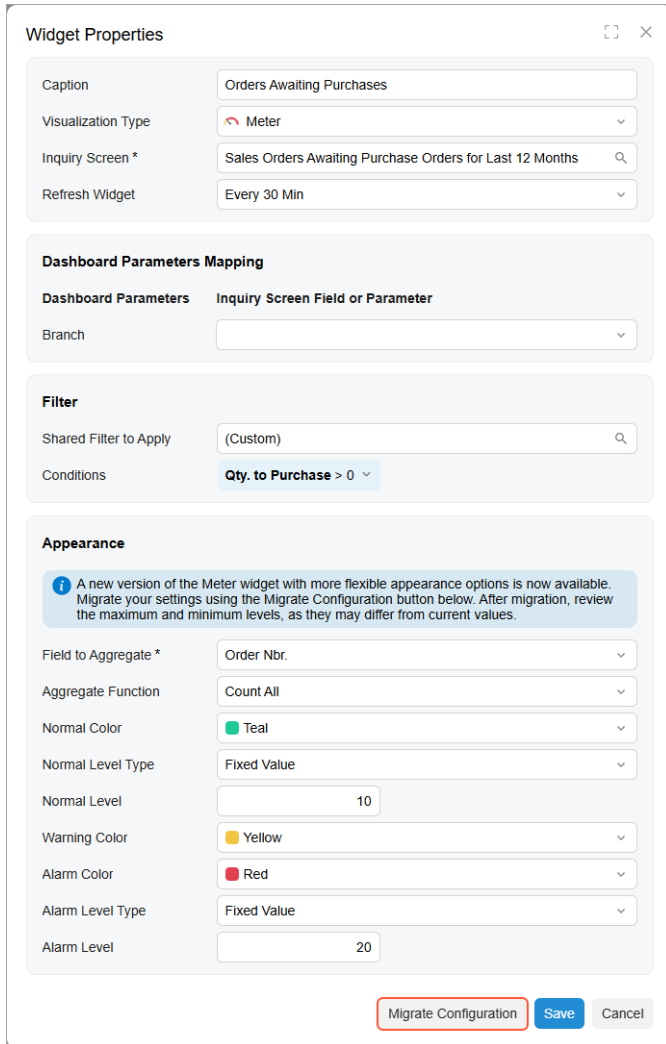
Figure: Specifying the Level settings of Meter widget

For each level you can select its own color, and how it will be calculated (fixed value, inquiry field, percentage of other value).

- If the current value is below the **Minimum** level, an additional sector appears on the left side of the widget and is drawn in the specified color.
- If the current value exceeds the **Maximum** level, an additional sector appears on the right side of the widget and is drawn in the specified color.
- If the current value is within the **Minimum** and **Maximum** levels, no additional sectors appear.

Migration Notes

These changes do not automatically apply to your existing meter widgets. To migrate a widget, open the **Widget Properties** dialog box, and press **Migrate Configuration** (as shown below).



The screenshot shows the 'Widget Properties' dialog box with the following sections and settings:

- Caption:** Orders Awaiting Purchases
- Visualization Type:** Meter
- Inquiry Screen *:** Sales Orders Awaiting Purchase Orders for Last 12 Months
- Refresh Widget:** Every 30 Min
- Dashboard Parameters Mapping:**
 - Dashboard Parameters:** Inquiry Screen Field or Parameter
 - Branch:** (Empty dropdown)
- Filter:**
 - Shared Filter to Apply:** (Custom)
 - Conditions:** Qty. to Purchase > 0
- Appearance:**
 - Field to Aggregate *:** Order Nbr.
 - Aggregate Function:** Count All
 - Normal Color:** Teal
 - Normal Level Type:** Fixed Value
 - Normal Level:** 10
 - Warning Color:** Yellow
 - Alarm Color:** Red
 - Alarm Level Type:** Fixed Value
 - Alarm Level:** 20

At the bottom of the dialog, there are three buttons: **Migrate Configuration** (highlighted with a red box), **Save**, and **Cancel**.

Figure: Migrating widget configuration

Platform: Generic Inquiry Enhancements

Starting in Acumatica ERP 2026 R1, you can now do the following while working with generic inquiries:

- Skip the calculation of the total number of records in any generic inquiry. If the associated generic inquiry form has many records, this helps it load faster by avoiding extra requests for record counting.
- Pass parameter values of the parent generic inquiry to its child inquiry. To do this, you define the parameter in the parent inquiry and reuse its value in the child inquiry.
- Declare inquiry parameters by using Generic Inquiry Query Language.

Skipping a Generic Inquiry's Record Count

The loading of generic inquiry forms that contain many records could take a long time. Now you can speed up this process by skipping requests that calculate the total number of records in the inquiry form. To do so, select the new **Disable Record Counts and Totals** check box in the Summary area of the [Generic Inquiry](#) (SM208000) form, as shown below.

The screenshot shows the 'Generic Inquiry' configuration screen. At the top, there are tabs for 'Note', 'Files', and a settings icon. Below that is a toolbar with icons for save, undo, add, delete, copy, and navigation, along with buttons for 'View Inquiry', 'Publish to the UI', and 'Unpublish'. The main form area contains several input fields: 'Inquiry Title *' (SO-SP-Sales Orders), 'Mode' (Low-Code selected), 'Site Map Title' (Sales Orders), and 'Screen ID' (SO.30.10.SP). A red box highlights the 'Disable Record Counts and Totals' checkbox, which is checked. Below the form are tabs for 'DATA SOURCES', 'RELATIONS', 'PARAMETERS', 'CONDITIONS', 'GROUPING', and 'SORT ORDER'. The 'DATA SOURCES' tab is active, showing a table with columns for Source Name, Description, and Alias.

Source Name	Description	Alias
PX.Objects.CR.CROpp...	An opportunity represents a potential, ongoing, or closed deal wi...	CROppportunity
PX.Objects.CR.CRRela...		CRRelation
PX.Objects.SO.SOOrder	Represents sales order and transfer order documents.	SOOrder

Figure: Disabling the calculation of record counting in an inquiry

When this check box is selected, the associated generic inquiry form loads faster, but it won't display the number of records or pages in the footer, as shown in the second screenshot below.

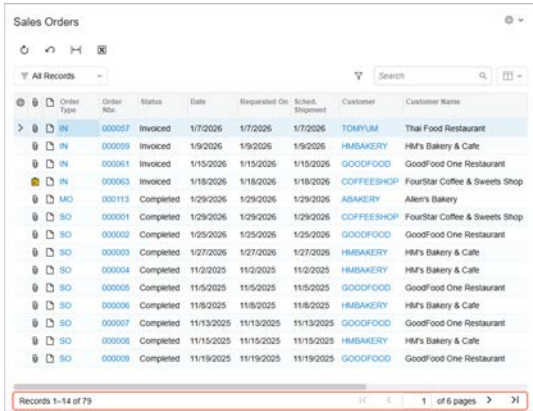


Figure: An inquiry form with a record count

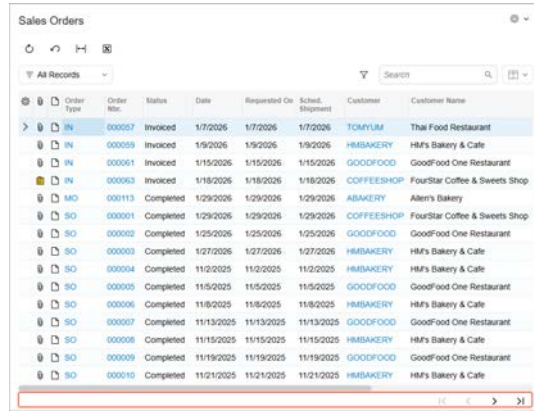


Figure: An inquiry form without a record count

Passing Parameter Values to a Nested Generic Inquiry

Previously, when you used a generic inquiry as a data source for another generic inquiry and wanted to use the same parameter value in both inquiries, you had to define the same parameter in both of them. Starting in Acumatica ERP 2026 R1, you can set a parameter in the parent inquiry and use its value in the child inquiry.

You specify the inquiry parameters on the **Parameters** tab of the *Generic Inquiry* (SM208000) form. When you define a parameter for a child inquiry and the **From Schema** check box isn't selected, the **Default Value** column displays a drop-down list with the values of the parent inquiry parameters. (See the child inquiry below.) The parameter names are displayed in brackets to avoid confusion with text values.

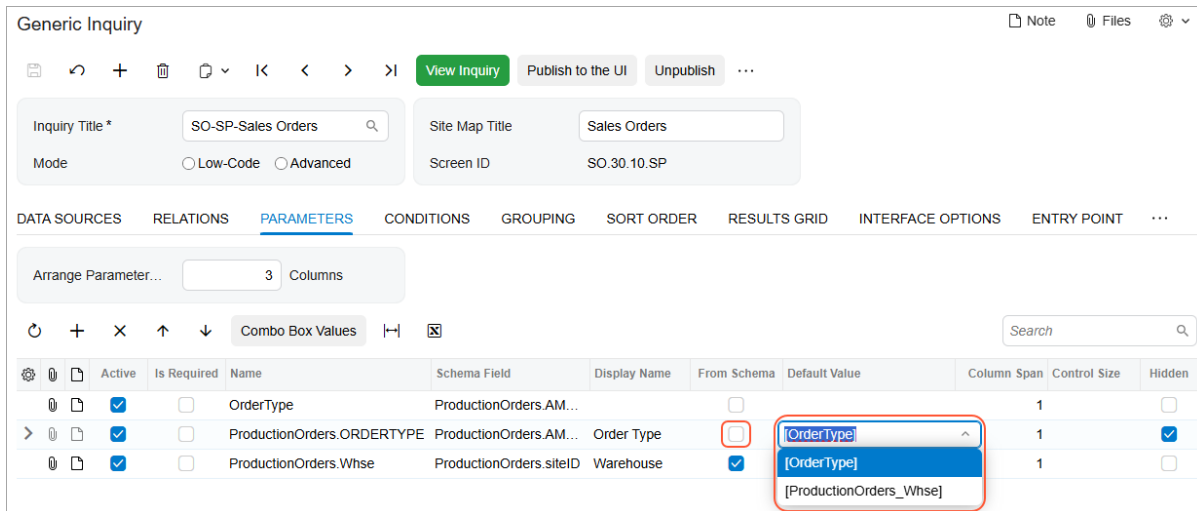


Figure: Specifying a parameter value for a child inquiry

Declaring Parameters in Generic Inquiry Query Language

Generic Inquiry Query Language (GIQL) is a powerful SQL-like language that was introduced in Acumatica ERP 2025 R2 to streamline how you create generic inquiries. Starting in Acumatica ERP 2026 R1, you can define inquiry parameters by using GIQL and later reuse them in the GIQL expressions.

To define a parameter, use the `DECLARE` statement. Each parameter can include essential properties, such as the display name, schema or field type, and default value. For example, the following code declares two parameters

that are linked to the [PX.Objects.AM.AMProdItem].EndDate schema, have the **From Date** and **To Date** display names, and have preselected default values.

```
DECLARE EndDateFrom SCHEMA [PX.Objects.AM.AMProdItem].EndDate DEFAULT @MonthStart-12 AS  
  'From Date'  
DECLARE ToEndDate SCHEMA [PX.Objects.AM.AMProdItem].EndDate DEFAULT @Today AS 'To Date'
```

You can then refer to these parameters in GIQL expressions, as shown in the following example.

```
WHERE (AMProdItem.EndDate >= EndDateFrom  
OR EndDateFrom IS NULL)  
AND (AMProdItem.EndDate <= ToEndDate  
OR ToEndDate IS NULL)
```

Learn More

For details on using generic inquiries as data sources, see [Data from Multiple Data Sources: Use of Generic Inquiry as Data Source](#).

To learn further details about declaring parameters in GIQL, see [GIQL: Defining Parameters](#).

Platform: Greater Control Over Date-Time Values in Pivot Tables

Acumatica ERP 2026 R1 offers you greater control over how date-time values are grouped and analyzed in pivot tables. You can now group date-time data by more granular date parts—such as day of quarter, week of month, or month of quarter—and calculate cumulative totals directly in pivot tables.

These enhancements make it easier to perform time-based analysis directly in pivot tables without exporting data to external tools. You can analyze trends over time, compare periods (such as this quarter versus the previous one or the same quarter last year), and track progressive results, such as weekly sales growth or cumulative monthly revenue.

Flexible Date Part Configuration in Pivot Tables

When configuring a pivot view, you can now specify which part of a date-time field to display and use for grouping. You can select one of the following options for the **Date Part** property:

- *Hour of Day*
- *Day of Week*
- *Day of Month*
- *Day of Quarter*
- *Day of Year*
- *Week of Month*
- *Week of Quarter*
- *Week of Year*
- *Month of Quarter*
- *Month of Year*
- *Quarter of Year*

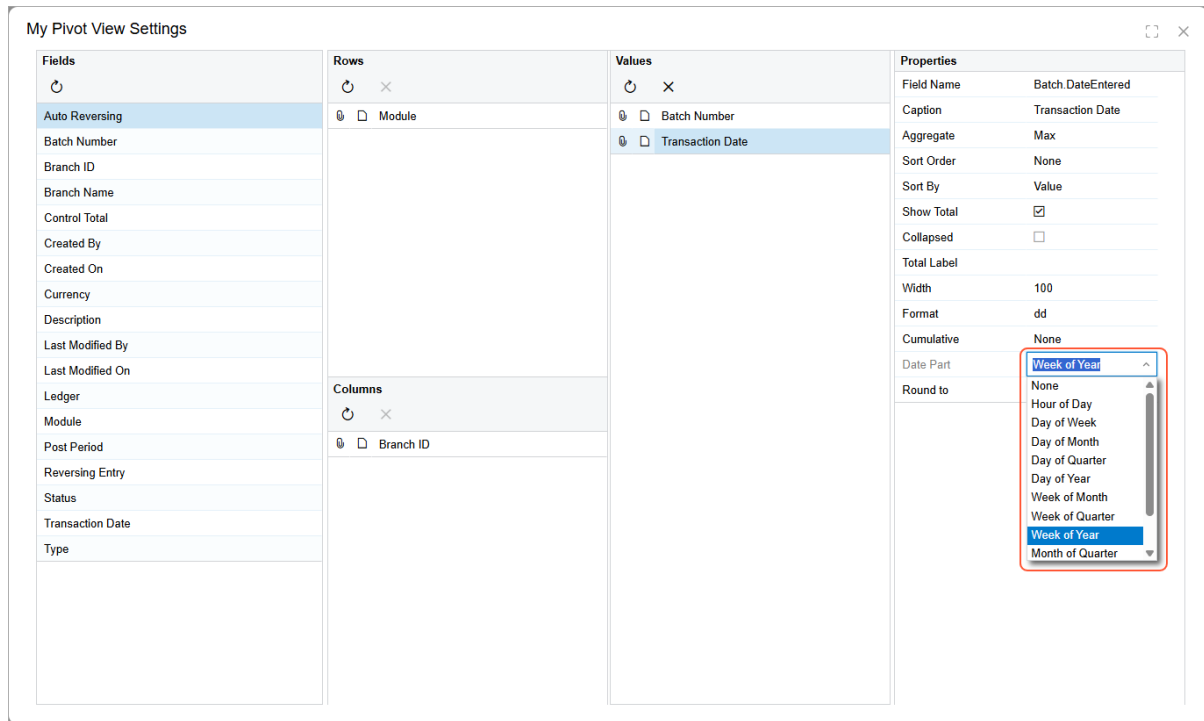


Figure: Displaying the transaction date as a week of the year

These options allow you to build more detailed time-based analysis directly in pivot tables. For example, you can:

- Compare weekly sales within each month
- Analyze seasonal patterns by month within a quarter
- Evaluate year-over-year performance by month

Cumulative Roll-Ups

When configuring pivot views, you can now use the new **Cumulative** property to display aggregated values as *cumulative roll-ups*, which are running totals. You can select one of the following options for the property:

- *None* (default): Values are shown with no cumulative roll-up.
- *By Rows*: Values are accumulated along the row axis. That is, each row value is added to the previous row value within the same column.
- *By Columns*: Values are accumulated along the column axis, with each column value added to the previous column value within the same row.

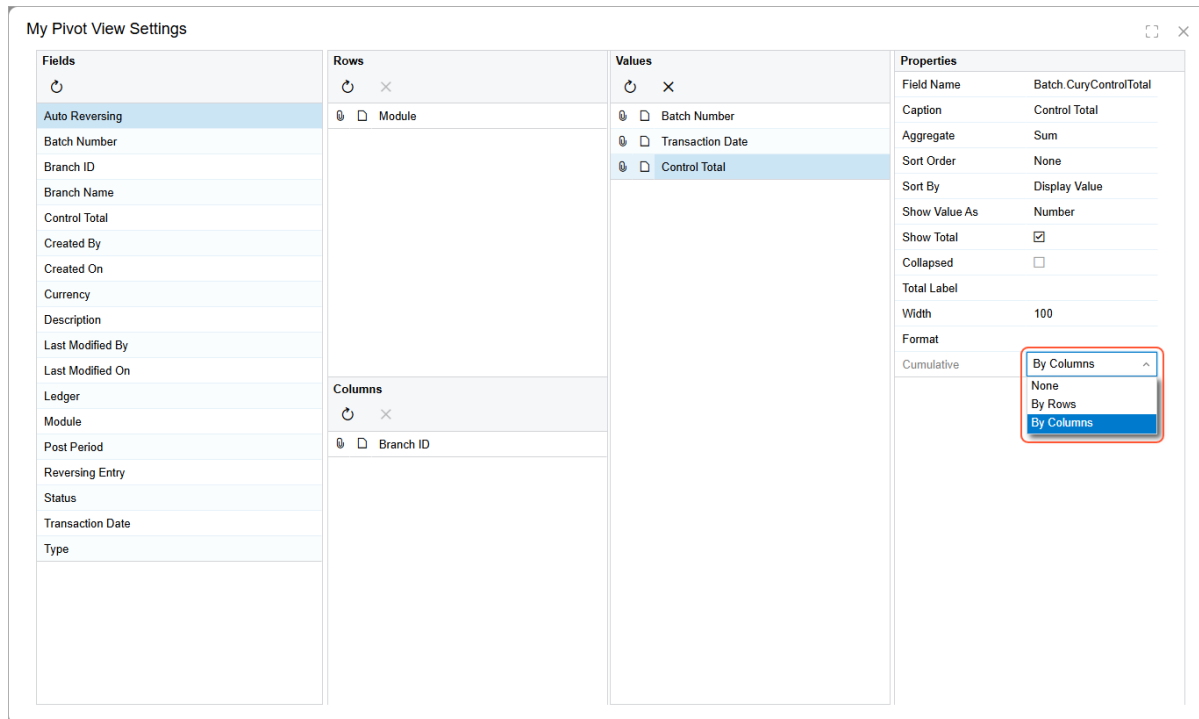


Figure: Specifying a cumulative roll-up

Cumulative roll-ups make it easier to track progressive results, such as revenue accumulating throughout a month or sales growth across a quarter.

Date Part Versus Round To

Because the **Date Part** and **Round To** properties both provide date-based grouping, it's important to understand how they differ:

- **Date Part** extracts a specific component of the date—such as *Month of Year* or *Week of Month*—and groups records by that component. For example, *Month of Year* groups all January records together, regardless of their year.
- **Round To** adjusts the date to the start of the selected time interval (such as the first day of the month) and groups records by that adjusted date. If *Month* is selected, January 2025 and January 2026 remain separate groups because the year is still part of the grouping.

Use **Date Part** when you want to compare the same period across different years, and use **Round To** when you want to analyze results within a specific calendar timeline.

Platform: Tag-Based File Management

The tag-based file management was introduced in *Document Management* feature, which was first added for project and construction documents in Acumatica ERP 2025 R2. In version 2026 R1, file tags become available system-wide. With this update, you can organize files by using tags, and quickly find what you need—all in one place.

Additionally, for project and construction documents, you can use tags to establish role-based access rights that define what users with the role can and can't do with the files with the tag assigned to it. This ensures that sensitive documents are available only to the right people.

New Capabilities

Tag-based file management helps you perform the following tasks more easily:

- Create each needed tag and specify its access rights
- Update access rights for existing tags
- Assign custom tags to files uploaded to the system
- Search for files by tag

Typical Use Cases

Here are some common use cases for tag-based document management.

Use Case 1: Filter Files by Tag

Inventory managers can assign tags to files—such as certificates, manuals, specifications and pictures—attached to an inventory item. Later, they can filter files by type and group them by owner, making it easier to selectively share the correct files on the Acumatica Self-Service Portal.

Use Case 2: Retrieve the Correct Files for Audit

Compliance or account managers can tag files by type (for example, *Certificate* and *Agreement*) and by additional attributes (such as *2024* and *Signed*) so that they can easily locate the correct and current file for audits.

Use Case 3: Locate Receipt Files

Receiving clerks or warehouse managers can tag files and photos attached to purchase receipts—for example, *Consignment*, *Customs*, *Condition - Damaged*, and *Condition - Intact*. This will allow them to easily distinguish between different types of receipt-related files and quickly retrieve the specific scanned documents or photos they need at any moment.

Setting Up Tags

Before assigning tags to files, you need to create these tags first and assign them access rights on the [File Tags](#) (SM202560) form as follows:

1. In the **Tags** pane, create tag by specifying its name and description.
2. In the **Access Rights** table, assign each role's access level to the selected tag.
3. Repeat the two previous instructions as needed for each tag.

The screenshot shows the 'File Tags' form. On the left is a sidebar with a list of tags: Agreement, Certificate, Condition - Damaged (selected), Condition - Intact, Consignment, Customs, Signed, Unsigned, and Untagged. The main area contains two input fields: 'Tag Name *' with the value 'Condition - Damaged' and 'Description *' with the value 'The order was damaged on delivery'. Below these is the 'Access Rights' section, which includes a search bar and a table with the following data:

Role	Guest Role	Description	Access Rights
Accountant	<input type="checkbox"/>	Role for accountants and managers who acc...	Revoked
AcumaticaSupport	<input type="checkbox"/>	Role for Acumatica Support. Access similar t...	Revoked
Administrator	<input type="checkbox"/>	System Administrator	Edit
AI Assistant User	<input type="checkbox"/>	A user that can access the AI Assistant Service	Revoked
Anonymous	<input checked="" type="checkbox"/>	Anonymous	View Only
AP Admin	<input type="checkbox"/>	Access to AP functions and settings	Revoked
AP Clerk	<input type="checkbox"/>	Access to AP functions	Revoked
AP Viewer	<input type="checkbox"/>	Read-only access to AP functions	Revoked
AR Admin	<input type="checkbox"/>	Access to AR functions and settings	Revoked
AR Clerk	<input type="checkbox"/>	Access to AR functions	Revoked
AR Viewer	<input type="checkbox"/>	Read-only access to AR functions	Revoked
Archivist	<input type="checkbox"/>	Archive Manager	Revoked
Audit History Access	<input type="checkbox"/>	Access to complete audit trails	Revoked

Figure: The File Tags form

Globally, a user role's access level determines which actions can be performed on the tag. For project and construction documents, it controls what users with that role can do with files assigned this tag. You can assign one of the following access levels to a tag:

- *Revoked*: Users can't access the tag or its files.
- *View Only*: Users can view tags and download files with the tag.
- *Edit*: Users can view and assign tags, as well as view, download, check out, upload new files or versions.
- *Create Version (Project Files)*: Users can view, download, check out, and upload new versions.
- *Edit and Upload (Project Files)*: Users can view, download, check out, and upload new files or versions, as well as assign the tag.
- *Delete (Project Files)*: Users can perform all actions plus delete.

The options that determine access level to project files are shown only if the *Document Management* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.



If a file has multiple tags for which your user role has different access levels, the system applies the most permissive level.

Assigning Tags

You can assign tags to any file uploaded to the system on the [File Maintenance](#) (SM202510) form. Clicking the magnifier icon in the **Tags** box displays the **Select Tags** dialog box, where you can select from the tags you have access to.

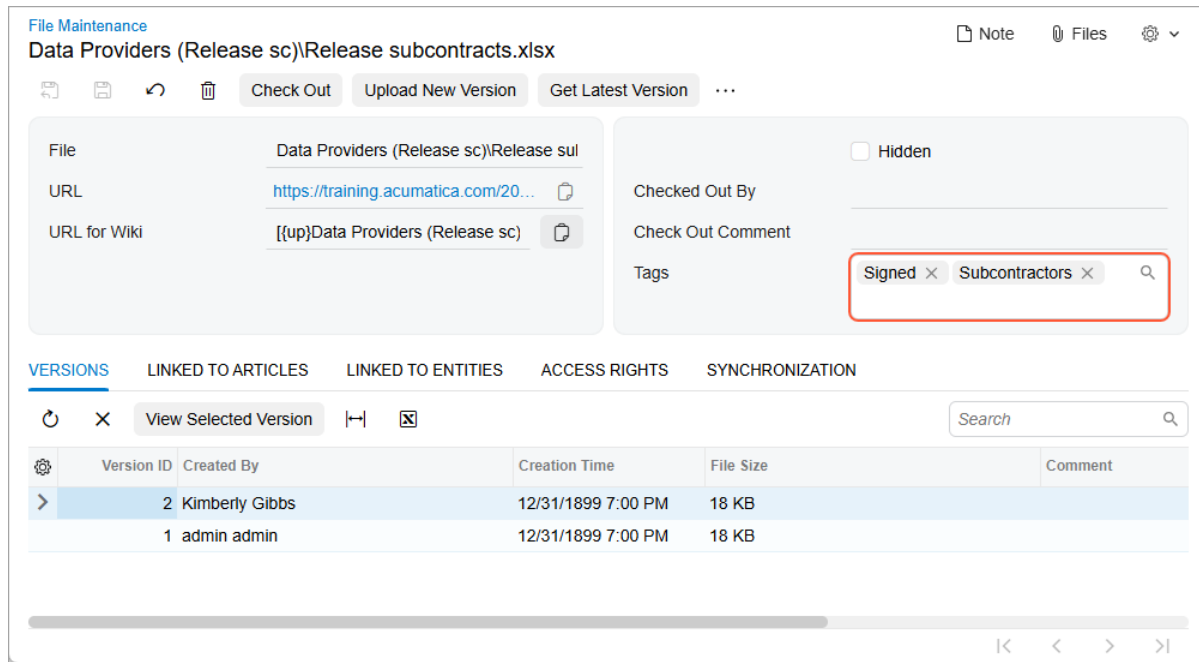


Figure: Tags assigned to the file

Searching by Tags

While searching for files using the [Search in Files](#) (SM202520) form, you can use tags as search criteria:

- To search for files with specific tags, specify them in the **Tags** box in the Selection area.
- To search for files that have no tags assigned, select the **Show Only Untagged Files** check box in the Selection area.

In the new **Tags** column of the search results table, you can see what tags are assigned to each of the found files.

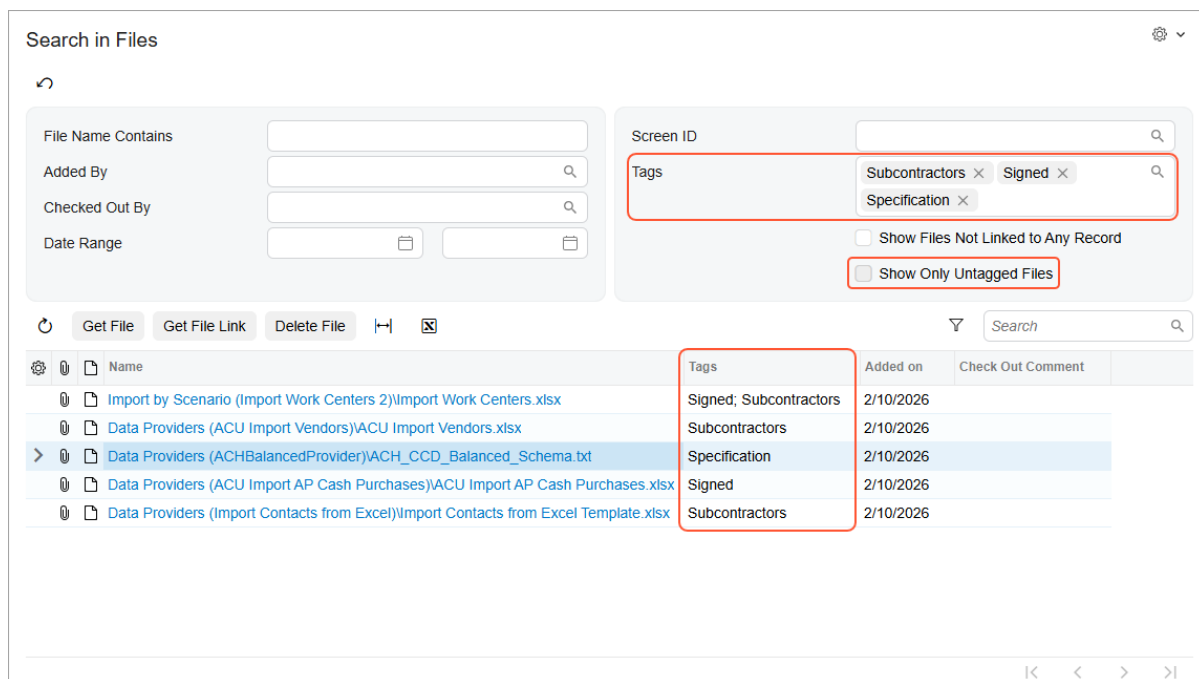


Figure: Using tags as search criteria

Professional Services: Project Revenue Analysis

Starting in Acumatica ERP 2026 R1, you can use the [Project Revenue Analysis](#) (EP408200) inquiry form to review a project's revenue by billing status throughout the project life cycle. By comparing revenue amounts with the project revenue budget and billed amounts, you gain an up-to-date view of the projected revenue and the remaining contract value.



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

Exploring Project Revenue Analysis

On the [Project Revenue Analysis](#) (EP408200) form, you can review a project's expected, billed, and unbilled revenue, as well as its draft invoice and write-off amounts. To get started, select one or more projects. (If you select multiple projects, each project's revenue analysis will be shown on a separate line.)

Project	Project Status	Revised Contract	Expected Revenue on Costs to Date	Expected Revenue on Costs to Date (%)	Expected Revenue to Completion	Unbilled Revenue to Date	Billed Revenue to Date	Billed Revenue to Date (%)	Billed Revenue to Completion	Write-Off to Date
> TOMYUM1	Active	2,500.00	0.00	0.00	2,500.00	0.00	0.00	0.00	2,500.00	0.00

Figure: The Project Revenue Analysis inquiry form

When you click **Calculate**, the system simulates billing for all billable, unbilled expenses to date based on the billing rule assigned to each project task. It then calculates the column values as described in the following table. Some calculations use the **Revised Contract** amount.

Column	Value
Expected Revenue on Costs to Date	Calculated as the total of: <ul style="list-style-type: none"> • Unbilled revenue • Billed revenue • Draft invoice amounts • Write-off amounts
Expected Revenue on Costs to Date (%)	Calculated by dividing the expected revenue on costs to date by the revised contract amount and multiplying the result by 100.
Expected Revenue to Completion	Calculated by subtracting the expected revenue on costs to date from the project's revised contract amount. The amount shows how much revenue is still expected to be earned, based on the accumulated costs.

Column	Value
Unbilled Revenue to Date	<p>Calculated in the project currency. The amount depends on the state of the Create Pro Forma Invoice on Billing check box on the <i>Projects</i> (PM301000) form:</p> <ul style="list-style-type: none"> Selected: The sum of the billed amounts in the lines of the simulated pro forma invoice Cleared: The sum of the extended prices in the lines of the simulated AR invoice <p>The calculation includes the unbilled revenue for project transactions associated with project tasks that have the <i>Active, In Planning, or Completed</i> status.</p>
Draft Invoice Amount	<p>Calculated in the project currency. The amount depends on the state of the Create Pro Forma Invoice on Billing check box for the project on the <i>Projects</i> (PM301000) form.</p> <p>If the check box is selected, the amount includes:</p> <ul style="list-style-type: none"> The total of the project's pro forma invoice lines for which the corresponding AR invoices haven't yet been released The total of the project's AR documents that have no associated pro forma invoices—for example, credit memos created from reversed AR invoices <p>If the check box is cleared, the column shows the total of the unreleased AR invoices, credit memos, and debit memos.</p>
Billed Revenue to Date	<p>Calculated based on the released AR documents for the project. The amount includes invoice and debit memo totals, adjusted by credit memo amounts.</p>
Billed Revenue to Date (%)	<p>Calculated by dividing the billed revenue to date by the revised contract amount and multiplying the result by 100.</p>
Billed Revenue to Completion	<p>Calculated by subtracting the billed revenue amount to date from the revised contract amount for the project. This value shows how much contract revenue remains to be billed.</p>
Write-Off to Date	<p>Calculated based on the project's released pro forma invoices. This amount includes both full write-offs and write-off remainders.</p>

Calculation rules:

The following rules apply to the calculations on this form:

- A project task is included only if it meets both of the following criteria:
 - The task's type is *Cost and Revenue Task*.
 - The task is billed with a billing rule that includes one or more steps of the *Time and Material* billing type. (This billing type allows the system to consistently calculate the expected and unbilled revenue based on the accumulated costs.)
- Document-level and line-level taxes (both inclusive and exclusive), as well as discounts, are excluded from calculation.

- Actual project budget history must be available. If a project was created before Version 2025 R2, you must select the **Recalculate Project Budget History** check box on the [Recalculate Project Balances](#) (PM504000) form to regenerate its budget history. After recalculation, you can return to this form to analyze the revenue.



The **Recalculate Project Budget History** check box is available only if the *Extended Financial Data Collection* is enabled on the [Enable/Disable Features](#) (CS100000) form.

Access Rights

Access rights to the [Project Revenue Analysis](#) (EP408200) inquiry form depend on a user's assigned role or roles. If a user has multiple roles with different access levels, the most permissive level applies.

By default, the following predefined user roles have the *Delete* access level:

- *Administrator*
- *Acumatica Support*

By default, the following user roles have the *View Only* access level:

- *PR Admin*
- *PR Manager*
- *PM Project Manager*
- *PM Project Manager Assistant*
- *PM Financial Controller*

Professional Services: Unbilled Project Revenue Aging

Starting in Acumatica ERP 2026 R1, you can view unbilled project revenue grouped by aging periods on the [Unbilled Project Revenue Aging](#) (EP408100) inquiry form. The form gives you visibility into billable work in progress across projects and project tasks, so you can monitor unbilled amounts and take action quickly.



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

Exploring Unbilled Revenue Aging

Suppose that you're preparing to bill projects or close a financial period and want to review unbilled revenue first. On the [Unbilled Project Revenue Aging](#) (EP408100) form, you can see which billable project tasks with the *Active*, *In Planning*, or *Completed* status have unbilled revenue. You can also review how unbilled revenue is distributed across aging periods based on how many days have passed since the project transaction date.

In the Selection area, you can:

- Specify a project to view data for its project tasks
- Select the **Show All Active Projects** check box to display data for all active projects and their project tasks

Unbilled Project Revenue Aging

Calculate | Search

Projects: CSTRREST | Show All Active Projects

Project	Project Description	Project Task	Project Task Description	Project Task Status	Project Manager	Total Unbilled Revenue	0-29 Days	30-59 Days	60-89 Days	90-119 Days	120+ Days
> CSTRREST	Italian Restaurant - T&M Bil...	01	GENERAL REQUIRE...	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	02	SITWORK	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	03	CONCRETE	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	04	MASONRY	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	05	METALS	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	06	WOOD, PLASTICS, ...	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	07	THERMAL AND MOI...	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	08	OPENINGS	Active	Jordan Kinlear	37,375.00	0.00	0.00	0.00	0.00	37,375.00
CSTRREST	Italian Restaurant - T&M Bil...	09	FINISHES	Active	Jordan Kinlear	21,246.25	0.00	0.00	0.00	0.00	21,246.25
CSTRREST	Italian Restaurant - T&M Bil...	10	SPECIALTIES	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	11	EQUIPMENT	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	12	FURNISHINGS	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	13	SPECIAL CONSTRU...	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	14	CONVEYING SYSTE...	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	15	MECHANICAL	Active	Jordan Kinlear	0.00	0.00	0.00	0.00	0.00	0.00
CSTRREST	Italian Restaurant - T&M Bil...	16	ELECTRICAL	Active	Jordan Kinlear	51,747.30	0.00	0.00	0.00	0.00	51,747.30
						110368.55	0.00	0.00	0.00	0.00	110368.55

Figure: The *Unbilled Project Revenue Aging* inquiry form

When you click **Calculate**, the system simulates the billing procedure by using the billing rule assigned to each project task to calculate the expected revenue for project transactions. The expected revenue amount is calculated in the project currency and depends on the state of the **Create Pro Forma Invoice on Billing** check box on the [Projects](#) (PM301000) form:

- Selected: The revenue is the sum of the billed amounts in the lines of the simulated pro forma invoice.

- Cleared: The revenue is the sum of the extended prices in the lines of the simulated AR invoice.



- The system calculates data only for project tasks of the *Cost and Revenue Task* type.
- Project tasks are included in calculations if they're billed by using a billing rule that includes only a step of the *Time and Material* billing type. (This billing type ensures that unbilled revenue can be calculated and distributed across aging categories in a consistent and predictable way.)
- The calculations exclude document-level and line-level taxes (both inclusive and exclusive), as well as discounts.

Access Rights

Your user roles determine your level of access rights to the [Unbilled Project Revenue Aging](#) (EP408100) inquiry.

Access Rights	Role
Delete	<ul style="list-style-type: none"> • Administrator • Acumatica Support
View Only	<ul style="list-style-type: none"> • PR Admin • PR Manager • PM Project Manager • PM Project Manager Assistant • PM Financial Controller

Projects and Construction: Align the Project and Branch in Purchasing and AP Documents

Using multiple branches in projects can create a simple but costly problem: A purchasing or AP document may be entered under the wrong branch.

In Acumatica ERP 2026 R1, you can keep a project's purchasing and AP documents aligned with the project branch—that is, use the project branch when assigning branches in these documents. This reduces manual corrections and provides more reliable branch-level financial reporting.

Depending on the configuration settings you specify, the system can:

- Automatically insert the project branch in the project-related document and its lines
- Warn you—or block document processing—if the project branch doesn't match the branch of the project-related document or document line



The project management functionality is available if the *Projects* feature is enabled on the [Enable/Disable Features](#) (CS100000) form. The new capabilities apply only when the *Multibranch Support* or *Multicompany Support* feature (or both) is enabled.

Selecting the Branch-Defaulting Approach in Project-Related Documents

If your organization includes multiple branches or companies, you can select the approach the system uses to determine the branch in project-related purchasing and AP documents. On the [Projects Preferences](#) (PM101000) form, you use the new settings, which are shown below.

In the new **Branch in Project Documents** box, you can select:

- *Ignore Project Branch* (default): The system uses the user's default branch—that is, the branch specified on the [User Profile](#) (SM203010) form and shown in the top pane of the Acumatica ERP screen. When you select the vendor in the document, the system changes the branch to the vendor branch if one is specified.
- *Use Project Branch*: The system inserts the project branch in the document and its lines.
- *Use Project Branch in Lines Only*: The system inserts the project branch only in document lines.

The screenshot shows the 'Projects Preferences' form with the 'GENERAL' tab selected. In the 'General Settings' section, the 'Block Doc. Processing on Branch Mismatch' checkbox is checked and highlighted with a red box. Other settings include 'Billing Cutoff*' set to 'Include Transactions with Billing Date', 'Validate T&M Revenue Budget Limits' set to 'Ignore', 'Revenue Budget Update' set to 'Detailed', 'Cost Budget Update' set to 'Detailed', and 'Budget Control' set to 'Show a Warning'. The 'Change Request Document Markups' table is also visible.

Type	Description	Value
> Cumulative (%)	Default cumulative (%)	5.00
%	Profit markup on cost	8.00
%	Overhead cost markup	5.00

Figure: New settings on the Projects Preferences form

By using the new **Block Doc. Processing on Branch Mismatch** check box (see above), you can block the processing of a project document when its lines have a different branch than the project does. Let's see how the blocking works.

Blocking Processing When Branches Don't Match

If you need the same branch to be selected in each project-related document and its lines, you select the new **Block Doc. Processing on Branch Mismatch** check box on the [Projects Preferences](#) (PM101000) form. With this check box selected:

- You can't process the document if at least one branch in a document line differs from the project branch.
- The **Branch** box becomes required on the [Projects](#) (PM301000) and [Project Templates](#) (PM208000) forms to ensure that each project has a branch specified.



- If you want to eliminate mistakes where a document line is saved with an incorrect branch and later processed without being noticed, select this check box.
- The system verifies whether your user account has access to the project branch and whether the project branch is allowed for the vendor selected in the document. For details, see [Vendor Visibility: General Information](#).

Where You Can Use the New Capabilities

Depending on the new configuration settings, the system can align the project's branch with the document branch on the following forms:

- [Bills and Adjustments](#) (AP301000)
- [Cash Purchases](#) (AP304000)
- [Change Orders](#) (PM308000)
- [Incoming Documents](#) (AP301100)

- [Purchase Orders](#) (PO301000)
- [Purchase Receipts](#) (PO302000)
- [Subcontracts](#) (SC301000)

You can also quickly check a project's branch while you're:

- Selecting a project in the **Project** box on a data entry form: The lookup table now shows the project branch.
- Viewing the Projects (PM3010PL) list of records: The new **Branch** column shows each branch specified for a listed project.

Use Case 1: Centralized Processing with Costs Posted to the Project Branch

Your company runs projects based in different branches, but purchasing is processed for all projects in the head-office branch. As a result, you enter this branch as the document-level branch for purchase orders and vendor bills. But individual lines must have the project branch specified so that the project expenses are posted to that branch.

For this case, you set up the branch-defaulting approach on the [Projects Preferences](#) (PM101000) form by specifying the following settings:

- **Branch in Project Documents:** *Use Project Branch in Lines Only*
- **Block Doc. Processing on Branch Mismatch:** Cleared

When you create a purchase order on the [Purchase Orders](#) (PO301000) form and select a vendor with a default branch specified, the system populates the **Branch** box on the **Other** tab with the vendor's branch. When you add a line and specify a project, the system inserts the project branch in the line based on the selected **Branch in Project Documents** option.

The screenshot displays the Oracle Purchasing interface for a purchase order (PO002768) for Concrete Supply Co. The interface includes a top navigation bar with a search field, a revision dropdown (Two Products Wholesale), a date dropdown (1/22/2026), and a user dropdown (Maxwell Baker). The main content area shows the purchase order details, including the vendor (CONCRETSUP - Concrete Supply Co.), location (MAIN - Primary Location), owner (Maxwell Baker), and project (<Multiple Projects>). The currency is set to USD. The summary section shows a detail total of 810.00, a tax total of 0.00, and an order total of 810.00. Below the summary, there are tabs for DETAILS, TAXES, SHIPPING, VENDOR INFO, APPROVALS, DISCOUNTS, PO HISTORY, PREPAYMENTS, CHANGE ORDERS, OTHER, and COMPLIANCE. The DETAILS tab is active, showing a table of line items. The table has columns for Project, Branch, Inventory ID, Line Type, Warehouse, Line Description, UOM, Order Qty, Qty. On Receipts, Unit Cost, Manual Cost, and Ext. Cost. Two line items are visible: one for CSTRREST (PROCRETAIL) and one for CSTRSUB (SERVWEST). The Project and Branch columns for both line items are highlighted with red boxes.

Project	Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty. On Receipts	Unit Cost	Manual Cost	Ext. Cost
CSTRREST	PROCRETAIL	LABORJR	Service		Labor - Junior Consultant	HOUR	5.00	0.00	90.00	✓	450.00
CSTRSUB	SERVWEST	LABORJR	Service		Labor - Junior Consultant	HOUR	4.00	0.00	90.00	✓	360.00

Figure: Using the project branch only in purchase order lines

When you create a purchase receipt or bill for your purchase order, the system copies the project branches to the document lines, as shown below.

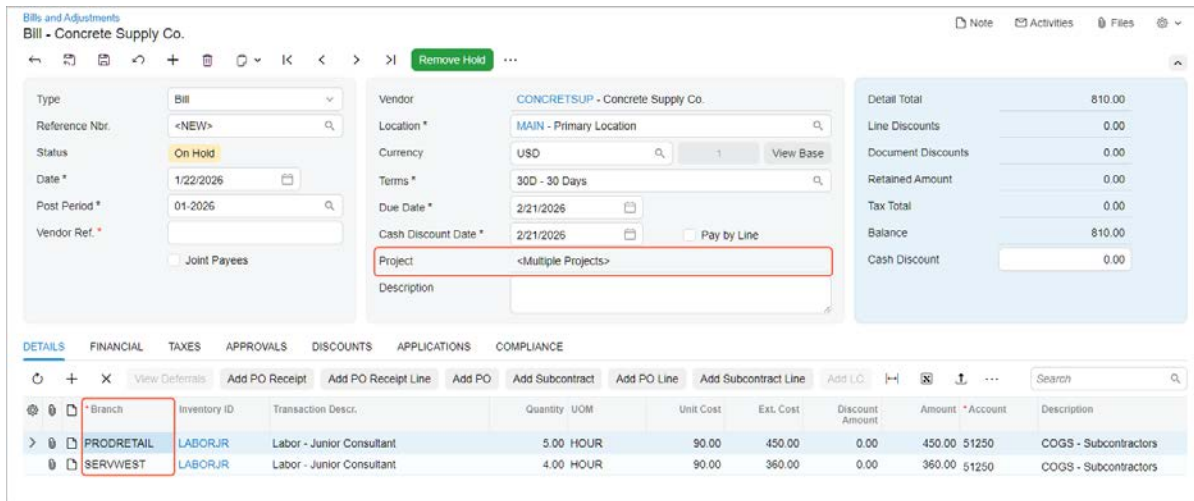


Figure: Copying the project branch to the related bill

Use Case 2: Strict Branch Alignment for Project-Related Purchasing

Your organization requires project-related purchasing documents to have the same branch at the document and line levels.

In this case, you set up the branch-defaulting approach on the *Projects Preferences* (PM101000) form by specifying the following settings:

- **Branch in Project Documents:** Use Project Branch
- **Block Doc. Processing on Branch Mismatch:** Selected

As a result, the **Branch** box becomes required on the *Projects* (PM301000) form for each project.

When you enter a purchase order on the *Purchase Orders* (PO301000) form and select a vendor with a default branch, the system populates the **Branch** box on the **Other** tab with the vendor's branch because the non-project code is inserted in the **Project** box by default. Your user account's default branch is shown in the top pane of the screen.

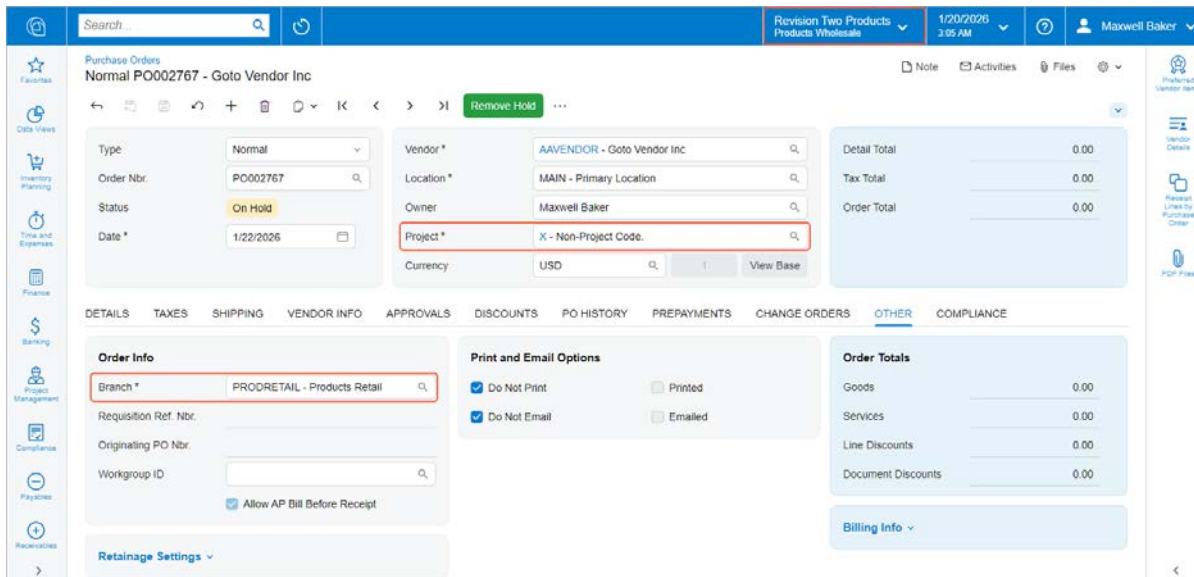


Figure: A purchase order for a vendor whose branch differs from the user account's default branch

When you add the first line on the **Details** tab and select the project, the system inserts the project branch in the added line and updates the originating document-level branch on the **Other** tab. If you add a line for a project with a different branch, the system displays a warning.

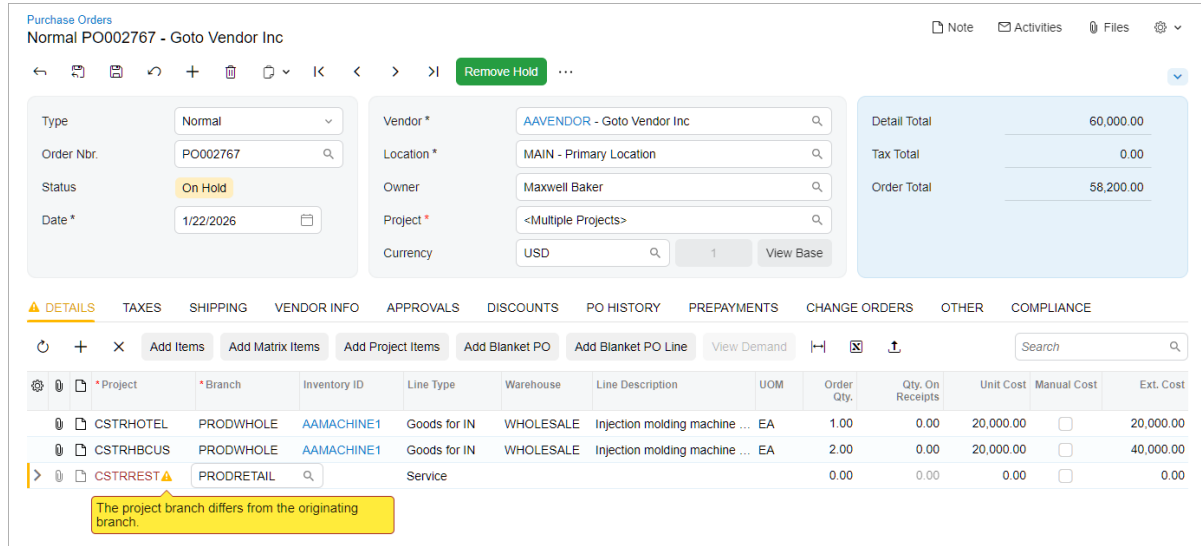


Figure: A purchase order whose project branch must match the user account's default branch

If the document-level branch and the line-level branches differ from the branch of any project specified in a line, you can't remove the purchase order from hold to continue processing it.

And when you create a purchase receipt or a bill for your purchase order, the system copies the branch to the document and its lines.

Quick Recap

- Streamline data entry and reduce mistakes while working with projects in multiple branches
- Select the branch-defaulting approach that fits your organization's operating model
- Protect branch-level financial reporting by keeping project expenses aligned with the correct branch

Projects and Construction: Audit of Unprocessed Records by Project

Have you ever found yourself about to close a project but unsure whether every related record has been fully processed? In Acumatica ERP 2026 R1, the new *Project Audit* (PM406000) generic inquiry form helps you find the answer quickly. The form shows you all unprocessed records tied to the project. You can scan the list, drill down into records that need attention, and decide what to do next—before closing the project.



- The *Project Audit* form is available in the Modern UI only if the *Projects* feature group is enabled on the *Enable/Disable Features* (CS100000) form.
- By default, the form is available to users with any of these roles: the *Administrator*, *Project Manager Assistant*, and *Acumatica Support*.

Easily Spot Records Pending Processing

You use the *Project Audit* (PM406000) form to review all records pending processing for a specific project.


Here's how to get started:

1. In the **Project** box (Item 1 below), select the project whose unprocessed records you want to review. You can select a project with any status except *Closed*.
2. Optional: In the **From** and **Until** boxes (Item 2), specify the date range of the records to be shown based on the **Date** value of these records.
3. In the left pane, click an entity type (Item 3)—such as bills and adjustments, pro forma invoices, or change orders. You can see the number of records pending processing next to each entity type. You can click any entity type to view the records of that type in the table (Item 4).

Record Type	Record Reference	Date	Description	Customer/Vendor/Employee	Status
Bill	000050	2/20/2026	Concrete for Italian Restaurant project	Suntech Concrete	Open
Bill	000102	3/1/2026	Paper work (plans and drawings)	Kam Design Inc.	Open
Bill	000098	3/3/2026	Builders risk insurance and workers compensation	Arc Insurance	Open
Bill	000051	3/4/2026	Masonry block and brick for Italian Restaurant pr...	Cornerstone Concrete	Open
Bill	000052	3/20/2026	Drywall & Ceiling for Italian Restaurant project	Sundance Drywall Company	Open
Bill	000112	3/23/2026	Metal works	Harmon Installation	Open
Bill	000114	3/28/2026	Purchase of carpets	Bellevue Home Depot	Open
Bill	000121	3/30/2026	Purchase of wood materials	TechLabs LLC	Open
Bill	000099	4/17/2026	Construction Insurance (April)	Arc Insurance	Open

Figure: The Project Audit form

Now you can review the list, drill down into individual records, and decide whether to process them or route them to someone else for follow-up.

 You can quickly open the [Project Audit](#) form when you're working with a project on the [Projects](#) (PM301000) or [Project Status](#) (PM301500) form. To do this, click **Project Audit** (under **Reports**) on the More menu. The form opens with this project selected and its pending records listed in the table.

Print and Share the Records Pending Processing

You may need to share the status of unprocessed records related to the project with other stakeholders. In this case, click **Print** on the form toolbar of the [Project Audit](#) (PM406000) form. This opens the [Project Audit \(PM406010\)](#) report, which you can print, email, or export to a PDF or Excel file.

PROJECT AUDIT					
Project	ITALIAN2				
Date From	1/30/2026	Date To			
Record Type	Record Reference	Date	Description	Customer/Vendor/Employee	Status
Bill	000050	2/20/2026	Concrete for Italian Restaurant project	SUNTECH	Open
Bill	000051	3/4/2026	Masonry block and brick for Italian Restaurant project	STONEC	Open
Bill	000052	3/20/2026	Drywall & Ceiling for Italian Restaurant project	SUNDW	Open
Bill	000053	8/26/2026	Lighting and installation for Italian Restaurant project	KADESIGN	Open
Bill	000098	3/3/2026	Builders risk insurance and workers compensation	ARCINS	Open
Bill	000099	4/17/2026	Construction insurance (April)	ARCINS	Open
Bill	000100	5/17/2026	Construction insurance (May)	ARCINS	Open
Bill	000101	6/17/2026	Construction insurance (June)	ARCINS	Open
Bill	000102	3/1/2026	Paper work (plans and drawings)	KADESIGN	Open
Bill	000112	3/23/2026	Metal works	HARMINT	Open
Bill	000114	3/28/2026	Purchase of carpets	HOMEDP	Open
Bill	000121	3/30/2026	Purchase of wood materials	TECHLAB	Open
Bill	000136	4/20/2026	Electricity works and elevators	HOMEDP	Open
Bill	000139	4/20/2026	Industrial equipment	TECHLAB	Open
Bill	000142	4/20/2026	Sitework (excavation and marking layout)	HARMINT	Open
Change Order	000003	4/15/2026		ITACOM	Open
Change Order	000004	4/20/2026		ITACOM	Open
Pro Forma Invoice	000018	5/1/2026	Invoice for ITALIAN2	ITACOM	On Hold
Purchase Order	000028	3/4/2026	Masonry block and brick for Italian Restaurant project	STONEC	Open
Subcontract	SC-000003	8/26/2026	Lighting and installation for Italian Restaurant project	KADESIGN	Open

Figure: The Project Audit ready-to-print form

Unprocessed Records Available for Review

The project-related records shown on the [Project Audit](#) (PM406000) form depend on the features enabled in your system. It can list unprocessed documents, transactions, and other records created on any of the following forms:

- [Appointments](#) (FS300200)
- [Bills and Adjustments](#) (AP301000)
- [Cash Purchases](#) (AP304000)
- [Cash Sales](#) (AR304000)
- [Cash Transactions](#) (CA304000)
- [Change Orders](#) (PM308000)
- [Change Requests](#) (PM308500)
- [Checks and Payments](#) (AP302000)
- [Cost Projection by Date](#) (PM305500)
- [Employee Time Activities](#) (EP307000)
- [Expense Claim](#) (EP301000)
- [Expense Receipt](#) (EP301020)
- [Release IN Documents](#) (IN501000)

- [Invoices and Memos](#) (AR301000)
- [Journal Transactions](#) (GL301000)
- [Paychecks and Adjustments](#) (PR302000)
- [Payments and Applications](#) (AR302000)
- [Production Order Maintenance](#) (AM201500)
- [Pro Forma Invoices](#) (PM307000)
- [Route Service Contracts](#) (FS300800)
- [Project Transactions](#) (PM304000)
- [Purchase Orders](#) (PO301000)
- [Sales Orders](#) (SO301000)
- [Service Contracts](#) (FS305700)
- [Service Orders](#) (FS300100)
- [Subcontracts](#) (SC301000)

Learn More

Need more details on how projects progress from planning to closure? See [Project Creation and Processing: A Project's Lifecycle](#).

Projects and Construction: Automated Revenue Percentage Calculation for Progress Billing

If you use progress billing, you know how tedious it is to estimate and enter completion percentages in multiple revenue budget lines. Manually reviewing revenue-related expenses takes time and may lead to inconsistent billing amounts and delayed invoices.

Acumatica ERP 2026 R1 automatically **calculates the recommended completion percentages** for revenue budget lines by using predefined rules. You can select the rule the system uses for these calculations: **actual costs versus the revised budgeted amount**, **actual costs versus the projected costs at completion** or **actual quantity versus the revised budgeted quantity**.

You can also create your own rules to match your business workflows.



This functionality is available if the *Projects* feature group is enabled on the [Enable/Disable Features](#) (CS100000) form.

Reviewing the Revenue Percentage Calculation Rules

To get started, you review the predefined rules on the new [Revenue Percentage Calculation Rules](#) (PM206500) form, shown below. You can't delete predefined rules, but you can modify their settings and formulas or add your own rules.

The screenshot shows the 'Revenue Percentage Calculation Rules' form for rule ID 'REVISSEDAMT'. The form includes the following fields and options:

- Rule ID ***: REVISSEDAMT
- Description**: Actual amount as a percentage of the revised budgeted amount
- Group by Task ***: Revenue Task (dropdown menu)
- Group by Item
- Group by Cost Code
- Formula**: $=100 * \text{If}(\text{Sum}([\text{PMCostBudget.CuryRevisedAmount}]) < > 0, \text{Sum}([\text{PMC...})$

Figure: The Revenue Percentage Calculation Rules form

Predefined Rules: You select one of these predefined rules, which determine how the system calculates the recommended revenue completion percentage of the project's budget lines:

- *REVISSEDAMT*: By comparing the actual amount with the revised budgeted amount.
- *REVISEDQTY*: By comparing the actual quantity with the revised budgeted quantity.
- *PROJCOST*: By comparing the actual amount with the projected cost at completion. The system uses the projected costs from the latest released cost projection—dated on or before the current business date—on the [Cost Projection by Date](#) (PM305500) form.



The *PROJCOST* rule appears on the form if the *Construction* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Grouping Logic: In the **Group by Task** box, you select the type of task to be used for grouping cost budget lines. With *Revenue Task* (the default option) selected, the system does the following for each revenue task:

1. Finds all cost budget lines with this revenue task
2. Totals actual amounts and budgeted amounts for the cost budget lines with this revenue task
3. Uses the total amount to calculate the completion percentage for the revenue budget lines with this revenue task

If you instead select *Project Task* in this box, the system does the following for each project task:

1. Finds all cost lines with this project task
2. Totals actual amounts and budgeted amounts for the cost budget lines with this project task
3. Uses the total amount to recommend the completion percentage for the revenue budget lines with this project task

Assigning the Rules

After you've chosen a revenue percentage calculation rule for a project that uses progress billing, you assign it to the project. That is, you select it in the new **Revenue Percentage Calculation Rule** box on the **Summary** tab of the *Projects* (PM301000) form.

The screenshot shows the PM301000 Projects form, Summary tab. The project is HMBAKERY3 - A training for employees. The Billing Rule is set to PROGRESS - Progress billing. The Revenue Percentage Calculation Rule is set to REVISEDAMT - Actual amount as a percentage of the revised budget... The Retainage section shows Retainage Mode as Standard, Contract Total as 1,000.00, and Retainage (%) as 0.000000. The AIA section shows AIA Level as Summary.

Figure: The rule selected for a project that uses progress billing

For each task of the *Revenue* or *Cost and Revenue* type added to the project, the system inserts this rule in the new **Revenue Percentage Calculation Rule** column on the **Tasks** tab of the *Projects* (PM301000) form, as shown below. (For existing project tasks, you must specify the rule manually.) You can override the inserted default rule. Once the rule is assigned to a project task, the system calculates the recommended values for each revenue budget line of a project with this task.

Projects
HMBAKERY3 - A training for employees

Project ID: HMBAKERY3
Start Date: 1/10/2026
Customer: HMBAKERY - HM's Bakery & Cafe
Description: A training for employees

Actual Income: 0.00
Actual Expenses: 0.00
Margin (%): 0.00

SUMMARY TASKS REVENUE BUDGET COST BUDGET BALANCES INVOICES UNION LOCALS ACTIVITIES EMPLOYEES EQUIPMENT

Task ID Type Description Rate Table Code Allocation Rule Billing Rule Revenue Percentage Calculation Rule Status Completed (%) Start Date End Date

Task ID	Type	Description	Rate Table Code	Allocation Rule	Billing Rule	Revenue Percentage Calculation Rule	Status	Completed (%)	Start Date	End Date
REPAIR	Cost and Revenue Task	Fixing issues with the juicers			PROGRESS	REVISDAMT	Active	0.00	1/10/2026	1/15/2026
SERVICE	Cost and Revenue Task	Troubleshooting issues with the juicers			PROGRESS	REVISDAMT	Active	0.00	1/10/2026	1/15/2026
TRAINING	Cost and Revenue Task	A training for employees			PROGRESS	REVISDAMT	Active	0.00	1/10/2026	1/30/2026

Figure: The rule assigned to a project task

You can specify the default rule in the **Revenue Percentage Calculation Rule** box on the **Summary** tab of these forms:

- **Project Tasks** (PM302000): The rule assigned to a project task is copied to the **Tasks** tab of the project.
- **Common Tasks** (PM208030): The rule assigned to a common task is copied to the **Tasks** tab of the project.
- **Project Templates** (PM208000): The rule assigned to a project template is inserted by default for the project.
- **Project Template Tasks** (PM208010): The rule assigned to a project template task is inserted by default for the project tasks.

The rule assigned to a project task affects the calculation of the recommended revenue completion percentage for it, and if you change this rule, the system uses the new rule to recalculate the recommended percentage.

Applying the Recommended Completion Percentage: Example

As an example of applying the recommended completion percentage, imagine that HM's Bakery and Cafe has ordered 20 hours of employee training on operating two juicers from SweetLife Fruits & Jams. You—SweetLife's project manager—have created a project with cost budget lines for these services:

- Four hours of juicer installation
- Twenty hours of training
- Four hours of inspection and maintenance

For this project, you've assigned the *REVISEDAMT* rule to each project task because you want to calculate the completion percentage for revenue by using the actual costs divided by the revised budgeted amount.

The project started on January 10, 2026. As of today, January 15:

- Both juicers have been installed.
- Ten hours of training have been delivered.
- Four hours have been spent on juicer inspection and maintenance.

While reviewing the **Revenue Budget** tab of the *Projects* (PM301000) form, you've noticed the following (see below):

- The training hours haven't been recorded: The line with the *TRAINING* project task has a recommended completion percentage of 0.
- Only two service hours of the four completed hours have been billed: The line with the *MISCREPAIR* project task has a recommended completion percentage of about 33 instead of about 67.

*Project Task	*Account Group	Description	Original Budgeted Quantity	UOM	Unit Rate	Original Budgeted Amount	Revised Budgeted Quantity	Revised Budgeted Amount	Draft Invoice Quantity	Draft Invoice Amount	Actual Quantity	Actual Amount	Completed (%)	Recommended Completion %
INSTALL1	REVENUE	Installation of the first juicer	2.00	HOUR	0.0000	100.00	2.00	100.00	0.00	0.00	0.00	0.00	0.00	100.00
INSTALL2	REVENUE	Installation of the second ...	2.00	HOUR	0.0000	100.00	2.00	100.00	0.00	0.00	0.00	0.00	0.00	100.00
MISCREPAIR	REVENUE	Fixing minor issues with t...	6.00	HOUR	0.0000	0.00	6.00	0.00	0.00	0.00	0.00	0.00	0.00	32.93
TRAINING	REVENUE	A training for employees	20.00	HOUR	0.0000	1,200.00	20.00	1,200.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure: The initial recommended completion percentage

You've contacted the project accountant about entering and releasing the missing documents. After they've processed these documents, you've verified that each revenue budget line shows the correct recommended completion percentage. Now you can apply the actual completion percentage as follows:

1. Select all revenue budget lines (see Item 1).
2. On the table toolbar, click **Update Completion %** (Item 2). The system inserts the completion percentage for each line (Item 3).
3. Save your changes.

*Project Task	*Account Group	Description	Original Budgeted Quantity	UOM	Unit Rate	Original Budgeted Amount	Revised Budgeted Quantity	Revised Budgeted Amount	Draft Invoice Quantity	Draft Invoice Amount	Actual Quantity	Actual Amount	Completed (%)	Recommended Completion %
INSTALL1	REVENUE	Installation of the first juicer	2.00	HOUR	0.0000	100.00	2.00	100.00	0.00	0.00	0.00	0.00	100.00	100.00
INSTALL2	REVENUE	Installation of the second ...	2.00	HOUR	0.0000	100.00	2.00	100.00	0.00	0.00	0.00	0.00	100.00	100.00
MISCREPAIR	REVENUE	Fixing minor issues with t...	6.00	HOUR	0.0000	0.00	6.00	0.00	0.00	0.00	0.00	0.00	67.07	67.07
TRAINING	REVENUE	A training for employees	20.00	HOUR	0.0000	1,200.00	20.00	1,200.00	0.00	0.00	0.00	0.00	50.00	50.00

Figure: Updating the completion percentages based on the system's recommendations

Now you're ready to bill the customer for the completed work on the project.

Comparing the Completion Percentage Across Rules

While viewing the project on the [Projects](#) (PM301000) form, you can click **Completion % by Rules** on the side panel (see Item 1). This side panel tab shows the new *Completion % by Rules* (PM407000) form.

Here you can compare the calculated completion percentages for different rules and decide which rule best reflects your company's revenue recognition policy for each project task. You can select a project task (Item 2), and see its calculated completion percentages (Item 3).

The screenshot displays the Acumatica ERP interface for a project named 'HMLAKERY3 - Installation of juicers and training for employees'. The main window shows the 'REVENUE BUDGET' tab with a table of project tasks. A new side panel tab, 'Completion % by Rules', is open on the right, showing selection and filtering criteria for a specific project task. The table in the main window is as follows:

Project Task	Account Group	Description
INSTALL1	REVENUE	Installation of the first juicer
INSTALL2	REVENUE	Installation of the second juicer
MISCREPAIR	REVENUE	Fixing minor issues with the juicers
TRAINING	REVENUE	A training for employees

The side panel 'Completion % by Rules' shows the following table:

Project Task	Account Group	Recommended Completion % (REVISEDAMT)	Recommended Completion % (REVISEDQTY)	Recommended Completion % (PROJCOST)
MISCREPAIR	REVENUE	67.07	66.67	0.00

Figure: The new side panel tab on the Projects form

Creating a Revenue Percentage Calculation Rule

You may want to create other rules on the [Revenue Percentage Calculation Rules](#) (PM206500) form to support your company's business processes. Here's what you do:

1. Enter the rule ID and description to identify the new revenue percentage calculation rule.
2. Click the Edit button in the **Formula** box and specify the formula in the dialog box that opens (for details, see [Formulas](#)).

In addition, depending on your requirements, you can do any of the following:

- For the system to consider only cost lines with the same inventory ID as in the revenue budget line, select the **Group by Item** check box.
- For the system to use the project task of the revenue budget line to find the matching cost lines, select *Project Task* in the **Group by Task** box.
- If you use cost codes and need the system to use cost lines with the same cost code as the revenue budget line, select the **Group by Cost Code** check box.

Key Takeaways

- **Less manual effort:** The system calculates the recommended completion percentage for each revenue budget line.
- **Flexible calculation rules:** You can modify the predefined rules or create custom rules to match your workflow.
- **Faster, more consistent progress billing:** You can apply the completion percentages with a single click and then refresh the pending invoice amounts.
- **Easier setup:** You can assign a predefined calculation rule to a template once, and the system will use the rule for new projects and project tasks with that template selected.

Upgrade Notes

When you upgrade to Acumatica ERP 2026 R1:

- You can use the predefined rules on the [Revenue Percentage Calculation Rules](#) (PM206500) form.

- The **Revenue Percentage Calculation Rule** box remains empty in existing projects, project templates, project tasks, project template tasks, and common tasks.

Projects and Construction: Optimized Project Document Management

In Acumatica ERP 2026 R1, project document management has been enhanced to give project teams more control, visibility, and flexibility when working with project files. You can now configure tag structures by project, access line-level attachments, assign tags to multiple files in one click, and control how duplicate files are uploaded.

Additional capabilities let you assign tags to files attached to construction documents, automatically tag files by using AI, review project documents and files in one place, and annotate PDF files directly in the system.



The functionality is available when the following features are enabled on the [Enable/Disable Features](#) (CS100000) form:

- *Document Management* for managing project files. With this feature enabled, the **Document Tag Setup** tab appears on the [Projects](#) (PM301000) form only in the Modern UI.
- *Construction Project Management* for enhancements related to construction documents.
- *360 Dashboards* for enhancements related to the [Project Status](#) (PM301500) form.
- *PDF Annotator Integration* for making annotations to PDF files.
- *AI Automation* for using AI-powered tag suggestions.

Creating Tags and Setting Up Tag-Based Access to Project Files

The *Configure Tags* (PM201500) form has been renamed to [File Tags](#) (SM202560). You now use this form only to define tags, their descriptions, and their access rights. On the **Tags** pane, you no longer configure the tag in a hierarchical structure; instead, the pane contains a list. Because tags aren't defined at different levels, the **Parent Tag** box has been removed.

To create a tag, you perform these steps:

1. In the **Tags** pane, add a tag (Item 1 below).
2. In the **Tag Name** box, enter the name of the tag (Item 2).
3. Optional: In the **Description** box, enter the tag's description (Item 3).
4. Save your changes.

The system creates the tag and displays it in the **Tags** pane alphabetically (Item 4).

For each role that may be assigned to an employee working with projects, you select the appropriate access level in the **Access Rights** column (Item 5).

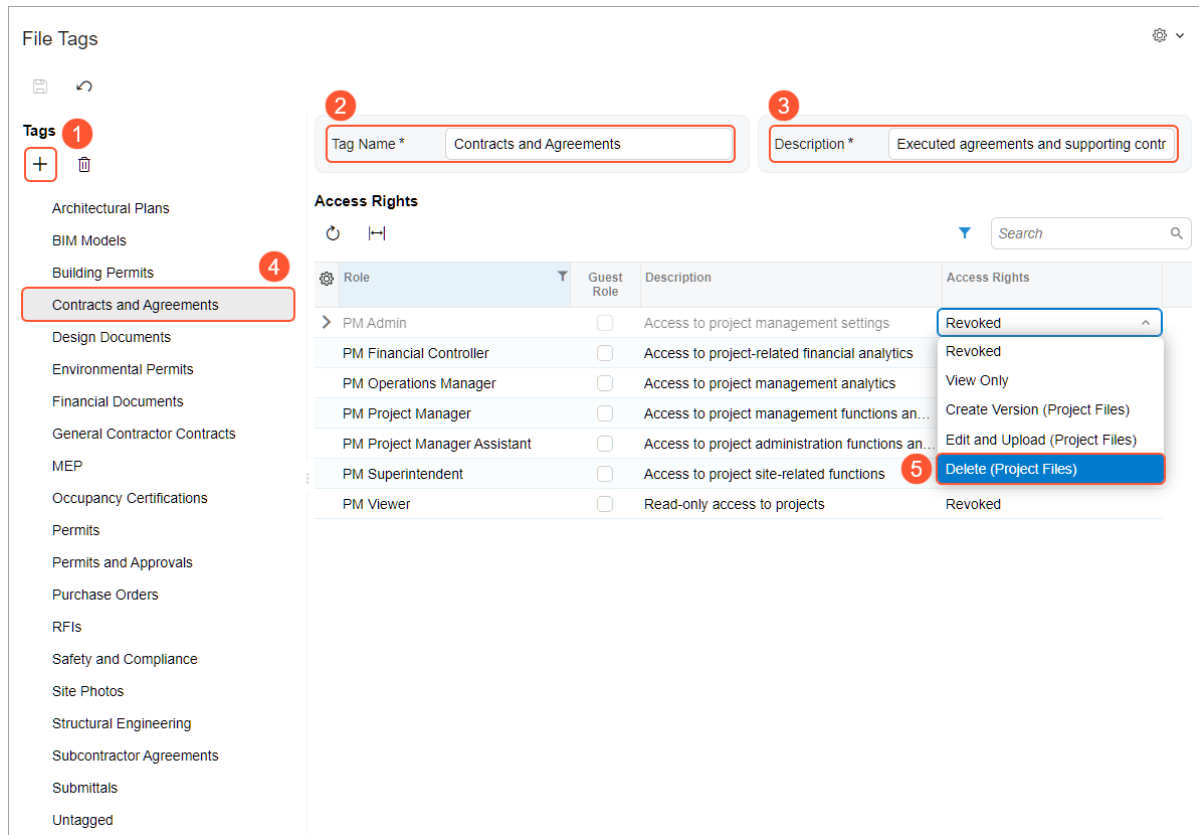


Figure: Defining the tags and their access rights

The following access levels—which determine how users with the role can use a file with the tag—can be assigned to a tag:

- *Revoked*: Users can't access the tag or its files.
- *View Only*: Users can view tagged files but can't modify them.
- *Create Version (Project Files)*: Users can view, download, check out, and upload new versions.
- *Edit and Upload (Project Files)*: Users can view, download, check out, and upload new files or versions, as well as assign the tag.
- *Delete (Project Files)*: Users can perform all actions plus delete.

Once all the tags have been set up, you can proceed with creating project-specific tag templates.

Defining a Tag Template for Projects

Projects may require different ways of organizing documents and thus different sets of tags. A *project tag template* contains a reusable tag hierarchy that defines which tags are used for a project by default and how they're arranged. When you assign a tag template to a project (or project template), the system copies the tag hierarchy to the project so that you don't need to build it from scratch.

You define tag templates on the new [Project Tag Templates](#) (PM204500) form. For each new tag template, you:

1. Enter the template ID and description and save your changes.
2. In the **Tags** pane, create tags under the **All Tags** top-level node, which appears when the tag template is saved. You can create a hierarchical list of tags or a single-level list of tags.
3. When you're ready to make the tag template available for users, select the **Active** check box.
4. Save your changes.

Project Tag Templates
CONSTRPROJECT002 - Tag template for large construction projects

Template ID *

Description

Active

Tags

+

▼ All Tags

- Contracts and Agreements
- Design Documents
- Site Photos
- Safety and Compliance
- Financial Documents**
- Submittals
- ▶ Permits and Approvals
- RFIs

Tag Properties

Tag Name

Description

Parent Tag

Access Rights

Role	Guest Role	Description	Access Rights
> PM Admin	<input type="checkbox"/>	Access to project management settings	Delete (Project Files)
PM Financial Controller	<input type="checkbox"/>	Access to project-related financial analytics	Edit and Upload (Project Files)
PM Operations Manager	<input type="checkbox"/>	Access to project management analytics	Edit and Upload (Project Files)
PM Project Manager	<input type="checkbox"/>	Access to project management functions and analytics	Edit and Upload (Project Files)
PM Project Manager Assistant	<input type="checkbox"/>	Access to project administration functions and analytics	Edit and Upload (Project Files)
PM Superintendent	<input type="checkbox"/>	Access to project site-related functions	Create Version (Project Files)
PM Viewer	<input type="checkbox"/>	Read-only access to projects	View Only

Figure: Defining a project tag template

You add tags to the **Tags** pane as follows:

1. Select the node under which you want to add tags (Item 1 below).
2. Click the Add button (Item 2).
3. In the dialog box that opens, select the needed tags (Item 3).
4. Click **Add**. The system closes the dialog box and adds the tags under the selected node.
5. Save your changes.



You can move any tag in the **Tags** pane to another position by dragging it.

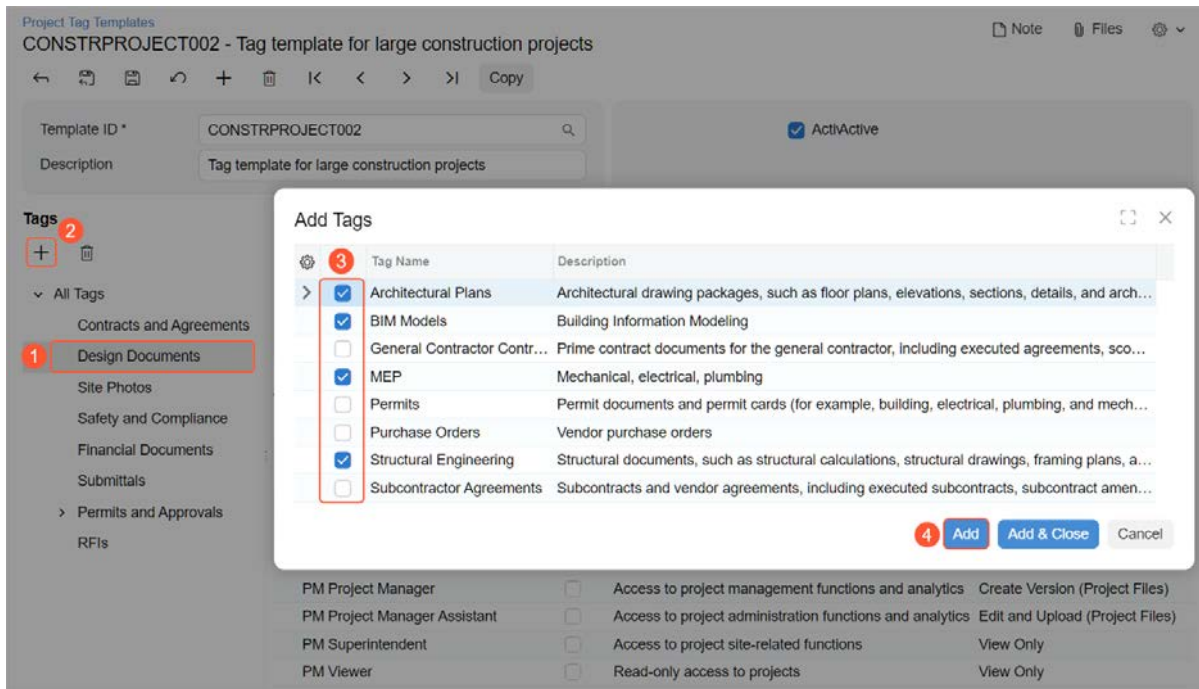


Figure: Adding tags to the Tags pane

You can see the added tags below.

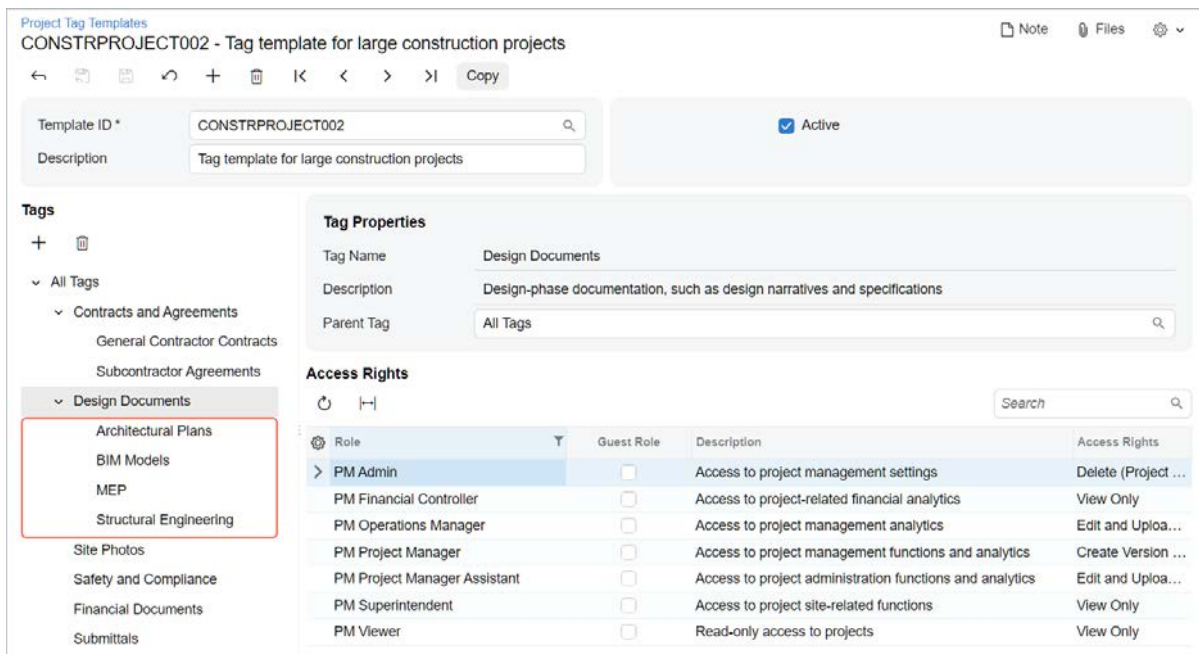


Figure: The added tags

You can view all tag templates in the *Project Tag Templates (PM2045PL)* list of records.

Selecting a Tag Template for a Project

You assign a tag template to a project on the new **Document Tag Setup** tab—which appears only in the Modern UI—of the *Projects* (PM301000) form. Once you select a template in the **Tag Template** box, the system displays:

- The tags in the **Tags** pane.

- The name, description, and parent tag of the tag selected in the pane.
- Each user role’s access level to the selected tag. The table is read-only; access rights can be changed only on the [File Tags](#) (SM202560) form.

The screenshot shows the 'DOCUMENT TAG SETUP' form for project 'CSTRHOTEL - The Beach Hotel and Condos'. The form is divided into several sections:

- Project Information:** Project ID (CSTRHOTEL), Start Date (1/1/2026), Customer (EQUGRP - The Equity Group Investors), and Description (The Beach Hotel and Condos).
- Financial Summary:** Actual Income (25,967,668.10), Actual Expenses (20,277,467.46), and Margin (%) (21.91).
- Navigation:** SUMMARY, TASKS, REVENUE BUDGET, COST BUDGET, BALANCES, COMMITMENTS, INVOICES, CHANGE ORDERS, DOCUMENT TAG SETUP.
- Tag Template:** CONSTRPROJECT002 - T...
- Tag Properties:** Tag Name (Design Documents), Description (Design-phase documentation, such as design narratives and specifications), Parent Tag (All Tags).
- Access Rights Table:**

Role	Guest Role	Description	Access Rights
PM Admin	<input type="checkbox"/>	Access to project management settings	Delete (Project ...)
PM Financial Controller	<input type="checkbox"/>	Access to project-related financial analytics	View Only
PM Operations Manager	<input type="checkbox"/>	Access to project management analytics	Edit and Uploa...
PM Project Manager	<input type="checkbox"/>	Access to project management functions and analytics	Create Version ...
PM Project Manager AS...	<input type="checkbox"/>	Access to project administration functions and analytics	Edit and Uploa...
PM Superintendent	<input type="checkbox"/>	Access to project site-related functions	View Only
PM Viewer	<input type="checkbox"/>	Read-only access to projects	View Only

Figure: Specifying the tag template and its settings

Selecting a Tag Template for a Project Template

You can also specify a tag template for a project template. On the [Project Templates](#) (PM208000) form, the new **File Tags** section has been added to the **Summary** tab. This section has the **Tag Template** box (see below), which lets you select a project tag template. When you create a project from this project template, the system copies the selected tag template to the project.

The screenshot displays the 'Project Templates' configuration page for 'CSTRPROGR - Construction Progress Billing Project'. The interface includes a top navigation bar with 'Project Templates' and 'CSTRPROGR - Construction Progress Billing Project'. Below this is a toolbar with navigation icons and buttons for 'Copy', 'Hold', and 'Change ID'. The main form is divided into several sections:

- Project Properties:** Includes fields for 'Template ID *' (CSTRPROGR), 'Description' (Construction Progress Billing Project), 'Project Currency *' (USD), and 'Project Status' (Active).
- Project Manager:** Fields for 'Project Manager' and 'Project Manager Assistant'.
- Summary Tab:** A horizontal menu with options: SUMMARY, TASKS, REVENUE BUDGET, COST BUDGET, EMPLOYEES, EQUIPMENT, DEFAULTS, ATTRIBUTES, and more.
- Project Properties (Expanded):**
 - Billing and Allocation Settings:** Includes 'Billing Period' (On Demand), 'Terms' (30D - 30 Days), 'Allocation Rule', 'Billing Rule' (CSTRPROGRESS - Construction Progre...), 'Branch' (PRODWHOLE - Products Wholesale), 'Rate Table Code', and 'Revenue Percentage Calcula...'. A checkbox for 'Create Pro Forma Invoice on Billing' is checked.
 - Retainage:** A dropdown menu.
 - AIA:** A dropdown menu.
 - Visibility Settings:** A grid of checkboxes for GL, AP, AR, SO, PO, IN, CA, CRM, Time Entries, and Expenses, all of which are checked.
 - File Tags:** A section with a 'Tag Template' field containing 'CONSTRPROJECT002 - Tag template fo...'.

Figure: Specifying the tag template in the project template

Setting Up the Tag Template for a Project

Once the tag template is assigned to a project on the [Projects](#) (PM301000) form, you can tailor this template for the project by doing the following:

- Adding existing tags to the template
- Selecting a different parent tag for an existing tag
- Moving tags within the **Tags** pane by dragging them

When you perform any of these operations and save your changes, the system opens a confirmation dialog box. If you confirm the changes, the system inserts **<MODIFIED>** in the **Tag Template** box (as shown below).

The screenshot displays the 'DOCUMENT TAG SETUP' configuration for a project. The 'Tag Properties' section shows the following details:

- Tag Name: Pre-Construction
- Description: Initial estimates, proposals, and drawings
- Parent Tag: All Tags

The 'Access Rights' table lists the following roles and their permissions:

Role	Guest Role	Description	Access Rights
PM Admin	<input type="checkbox"/>	Access to project management settings	Delete (Project ...)
PM Financial Controller	<input type="checkbox"/>	Access to project-related financial analytics	View Only
PM Operations Manager	<input type="checkbox"/>	Access to project management analytics	Edit and Uploa...
PM Project Manager	<input type="checkbox"/>	Access to project management functions and analytics	Create Version ...
PM Project Manager As...	<input type="checkbox"/>	Access to project administration functions and analytics	Edit and Uploa...
PM Superintendent	<input type="checkbox"/>	Access to project site-related functions	View Only
PM Viewer	<input type="checkbox"/>	Read-only access to projects	View Only

Figure: The project-specific tag template

Managing All Project Files More Easily

Once you've selected a tag template for a project—and perhaps modified it—you can manage all project-related files on the [Manage Project Files by Tag](#) (PM509000) form. When you select the project (Item 1 below), the system shows all project tags in the **Tags** pane (Item 2).

In the central pane, you can see the number of the files with the selected tag, including the **All Files**, **All Tags**, and **Untagged** nodes (Item 3).

To edit the tags assigned to a file, you click the row with the file, click the magnifier button (Item 4), and select the tags in the **Select Tags** lookup table. Alternatively, you can start typing the tag name, and the system will open the list of the tags matching this string; you select the needed tag.

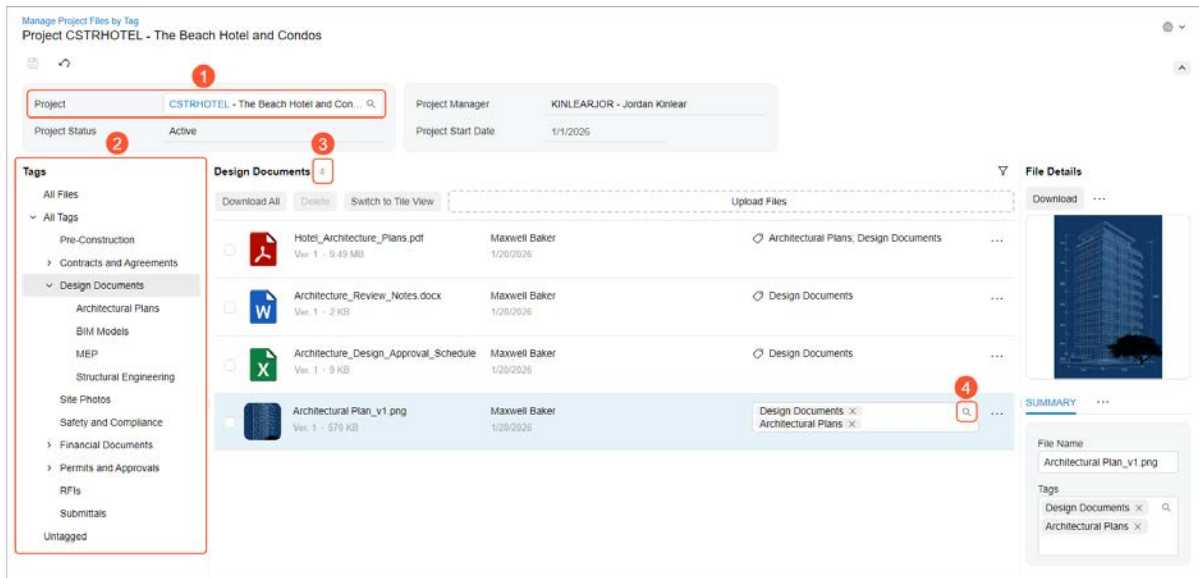




Figure: Managing the tags of a project's files

 On this form, you can view not only files attached to a record, such as a bill, purchase order, or subcontract, but also files attached to the record's detail lines.

To assign the same tag or tags to multiple files, you:

1. Select the files (Item 1 below).
2. Click **Assign Tags** (Item 2), which opens the dialog box.
3. In the **Tags** box, click the magnifier button (Item 3) and select the tags in the **Select Tags** lookup table.

 Alternatively, you can start typing the tag name, and the system will open the list of the tags with this name for you to choose from.

4. Click **Assign** (Item 4).

To remove all the tags from one file or from multiple files, you select the needed files and click **Untag** (Item 5).

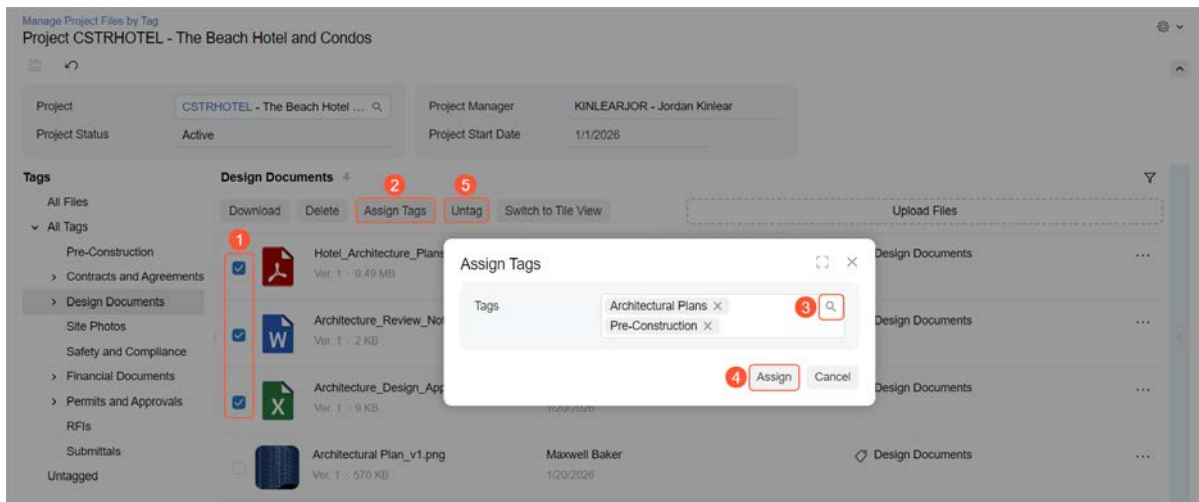


Figure: Assigning tags to multiple files

Managing Project Files by Record Type

While working with files on the enhanced [Manage Project Files by Record Type](#) (PM509500) form, you can:

- View the vendor or employee ID in a row with the file.
- Search for files by vendor or employee.

Finding files works somewhat differently depending on what you've selected in the **Record Types** pane:

- **Bills and Adjustments, Compliance Documents, Purchase Orders, Purchase Receipts, and Subcontracts:** For these record types, the central pane now shows the linked document's reference number and the vendor identifier (Item 1 below). If you need to find files related to a particular vendor, you use the new **Vendor** filter (Items 2 and 3).
- **Expense Claims, Expense Receipts, and Employee Time Cards:** For these record types, the central pane now shows the linked document's reference number and the employee identifier. To find files related to a specific employee, you use the new **Employee** filter.

You can also edit the set of the tags for a file. To do this, click the line with the file and add the needed tags to the new box (Item 4), similar to the workflow on the [Manage Project Files by Tag](#) (PM509000) form.

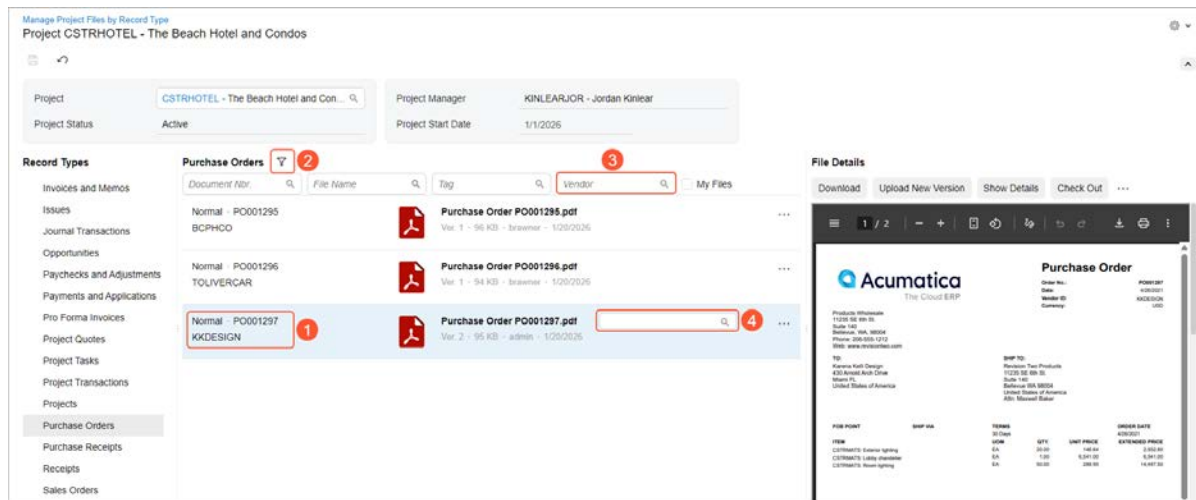



Figure: Working with project files

 On the [Manage Project Files by Record Type](#) form, you can view files attached to a record—such as a bill, purchase order, or subcontract—as well as its detail lines.

Uploading a Duplicate File

On the [Manage Project Files by Tag](#) (PM509000) form, you might try to upload a file that already exists in the system. If the file has the same name and extension as the existing file, the system prompts you to select the way to proceed. When you click **Upload Files**, the system opens the **Upload Files** dialog box, temporarily uploads the file on the form, and shows its summary information (see below). You can:

- Cancel the uploading if the file is a duplicate
- Upload it as a new file version
- Upload it as a new file

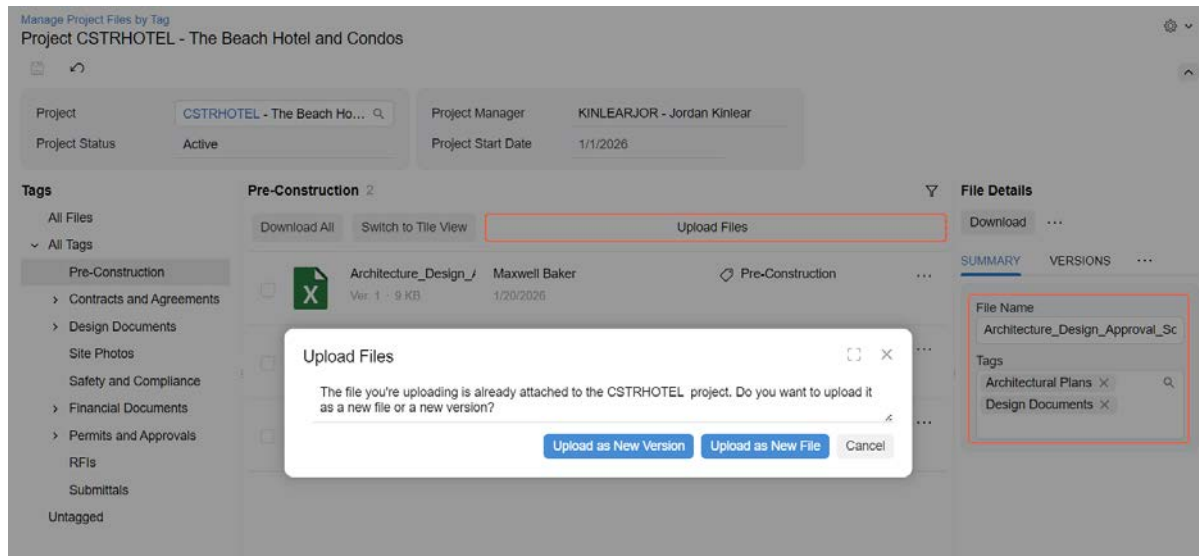


Figure: Uploading a possible duplicate file

Similarly, if you try to upload a file with the same name and extension on the [Manage Project Files by Record Type](#) (PM509500) form, the **Upload Files** dialog box opens for you to select what to do about the file.

Viewing Options for Project Files

You can toggle between list view and icon (tile) view on the [Manage Project Files by Tag](#) (PM509000) form. If you click **Switch to Tile View** in the central pane, the system displays files as tiles (Item 1 below).

Each tile shows the file's preview icon, the file name, the username of the user who uploaded the file, and the date of the last version.

Depending on the file type, clicking its icon opens:

- An image viewer for image files
- File details for other files

To open the row-level More menu, you hover over the tile and click the button that appears (Item 2).

To see the list of the files again, you click **Switch to List View** (Item 3).

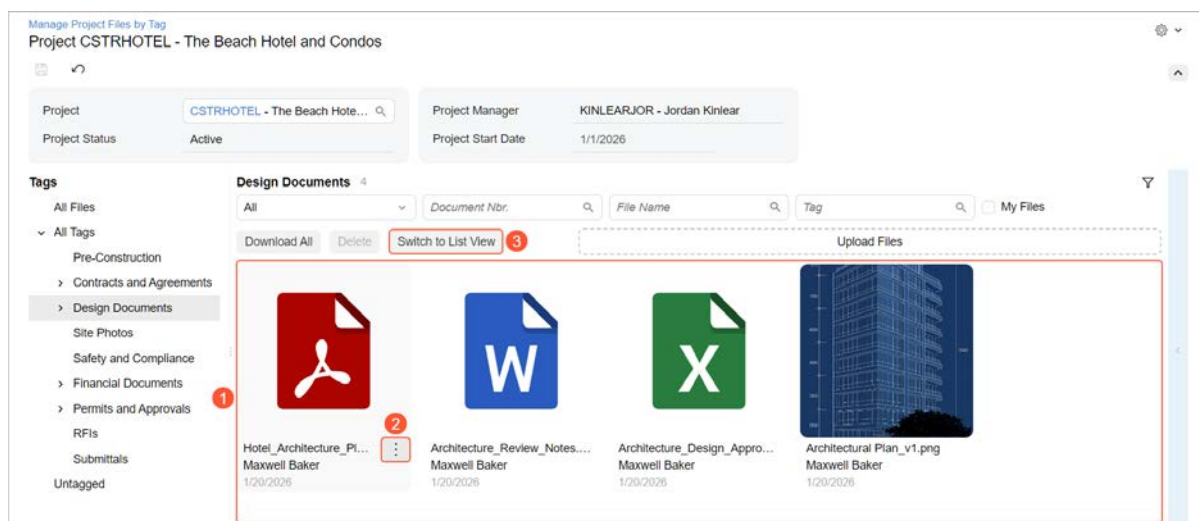


Figure: Viewing tiles for the project files

Using Additional Tagging Options

You can assign or change tags in the new **Tags** column of the **Files** dialog box on forms with the **Files** menu on the form title bar, as shown below. When you select the tags, you don't need to save the form—the system adds the selected tags automatically.



You can select only files with tags to which one of your user roles has the *Edit and Upload (Project Files)* or *Delete (Project Files)* access.

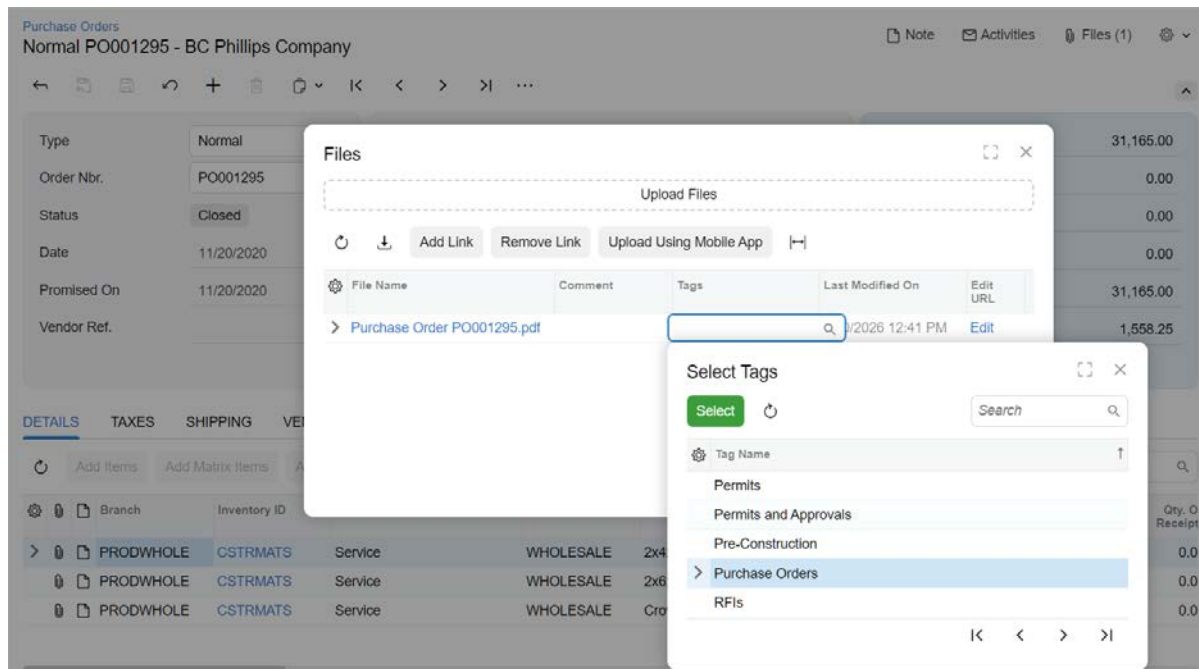


Figure: Assigning tags in the Files dialog box

Linking Project Files to Project Documents

When the *Construction Project Management* feature is enabled, you can link the selected project files as attachments to construction documents. You no longer need to create duplicate physical copies of the documents. The new **Link Project Files** button has been added to the form toolbar (and the same command to the More menu) on these forms:

- [Change Orders](#) (PM308000)
- [Change Requests](#) (PM308500)
- [Daily Field Report](#) (PJ304000)
- [Drawing Log](#) (PJ303000)
- [Photo Log](#) (PJ305000)
- [Project Issue](#) (PJ302000)
- [Request for Information](#) (PJ301000)
- [Subcontracts](#) (SC301000)
- [Submittals](#) (PJ306000)

When you click **Link Project Files**, the dialog box with the same name **Project** opens. You select the project files and then link them to the currently opened record by clicking **Add Link**.

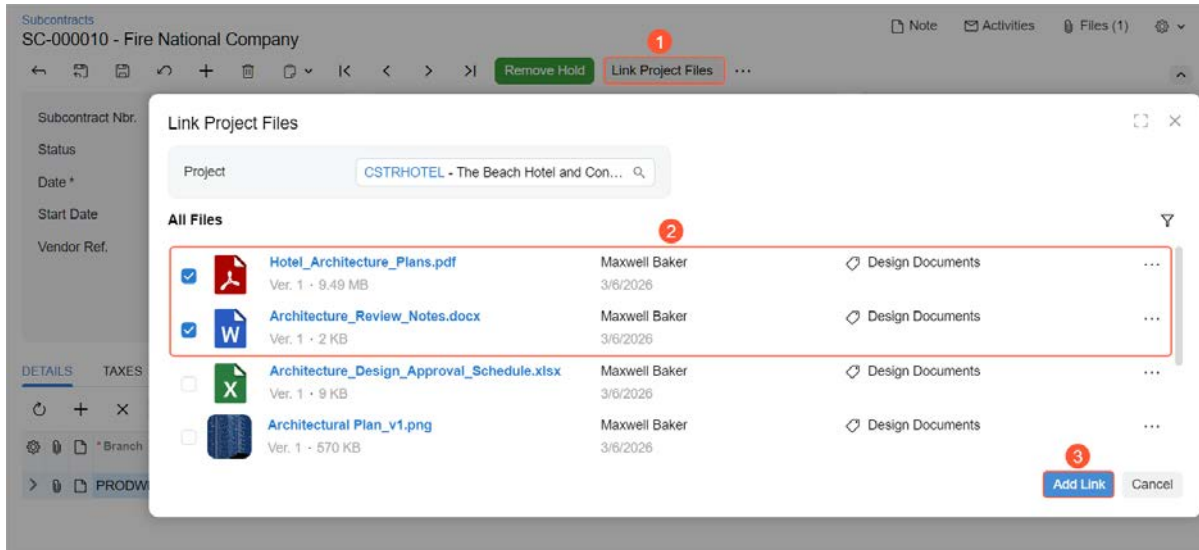


Figure: Linking project files to a subcontract

Centralized Project View with File Management

When the *Document Management* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, you can view the following new side panel tabs on the [Project Status](#) (PM301500) form, as shown below:

- **Files by Tag:** Opens the [Manage Project Files by Tag](#) (PM509000) form with all project-related files.
- **Files by Record Type:** Opens the [Manage Project Files by Record Type](#) (PM509500) form with the files attached to the project and project-related records.

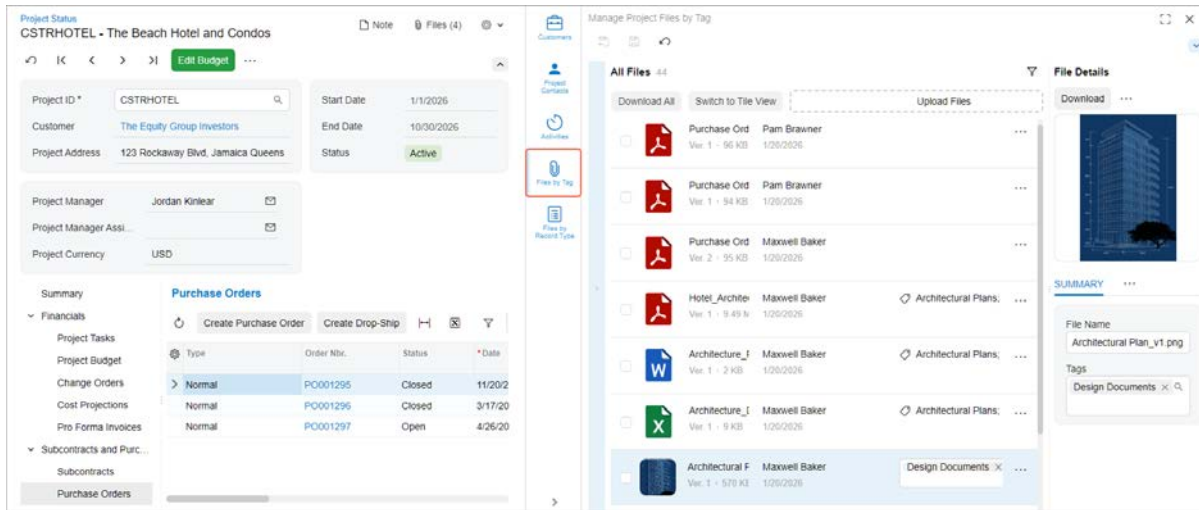


Figure: The Files by Tag side panel

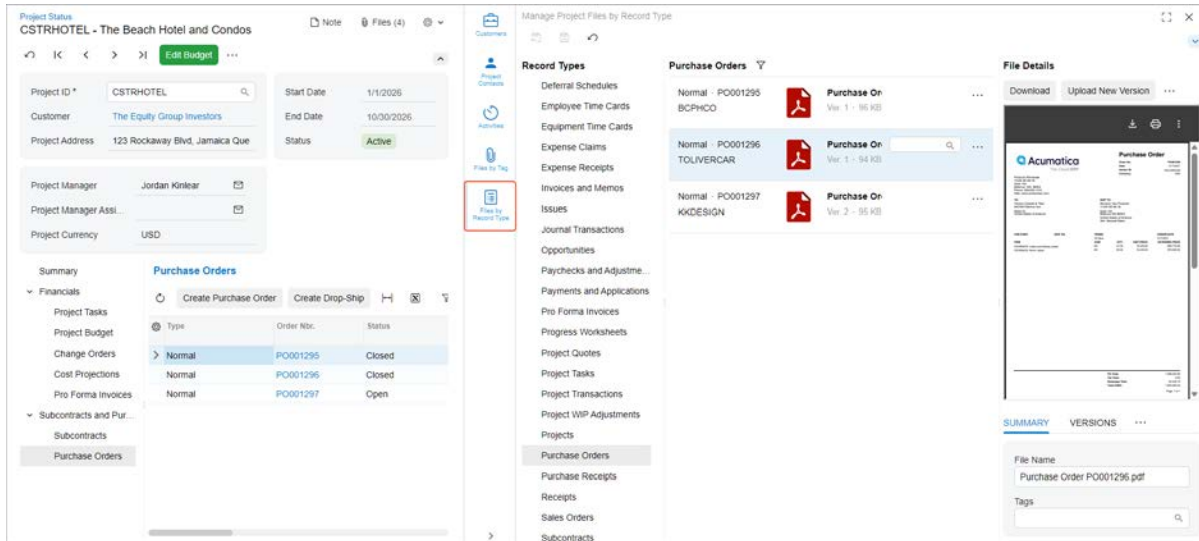



Figure: The Files by Record Type side panel

 On both side panels, you can toggle between list view and icon view for the files in the central pane.

Annotating PDF Files with the New Side Panel

When the *PDF Annotator Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form, you can annotate PDF files on the *Manage Project Files by Tag* (PM509000) form. The new **PDF Files** side panel tab becomes available (see below).

In the **File Name** box, you can see all PDF files attached to the selected project and its related records. If you click a file in the central pane, the system opens its preview. From the panel, you can:

- Open the file in the integrated PDF Annotator
- Add highlights, notes, or drawings
- Save your changes as a new version to keep the version history

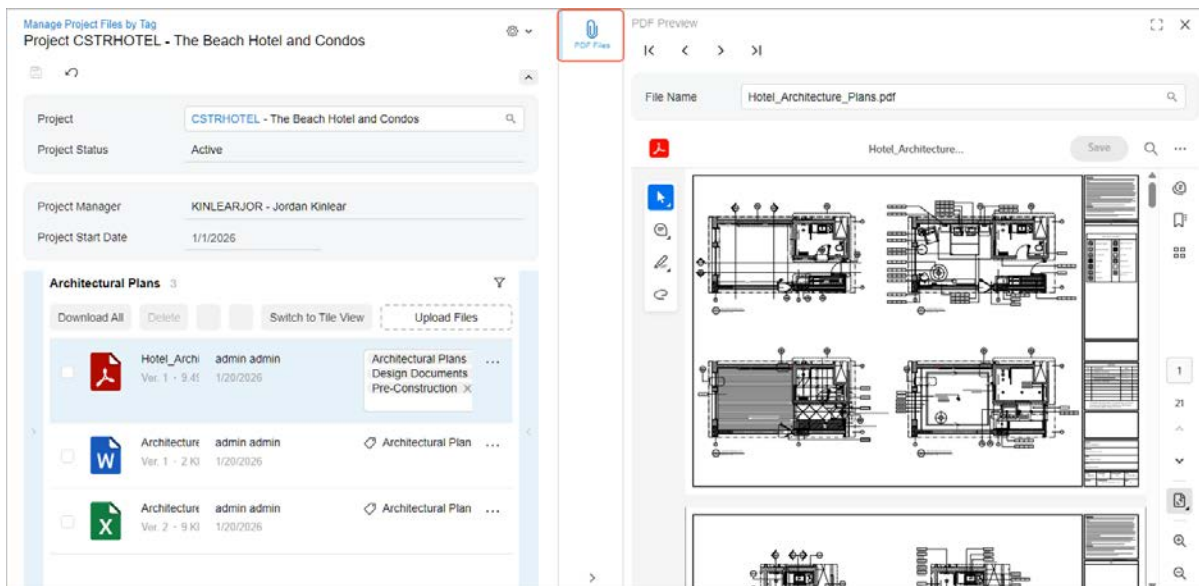


Figure: The PDF Files side panel

For details about the integration, see [Integrations: Annotate PDF Attachments](#).

AI-Powered File Autotagging

When the *AI Automation* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, you can use the new *FILE-AUTOTAG* prompt on the [LLM Prompts](#) (ML202000) form.

The screenshot shows the 'FILE-AUTOTAG - Project Document Management: File Autotagging' configuration page. The 'Prompt ID' is 'FILE-AUTOTAG', the 'Prompt Name' is 'Project Document Management: File Autotagging', and the 'LLM Connection' is '1 - autotagging'. The 'Active' checkbox is checked. The 'Prompt Testing' section shows 'Input Tokens', 'Output Tokens', and 'Total Tokens' all at 0, with a 'Test Prompt' button. The 'INSTRUCTIONS' tab is selected, showing a prompt that instructs the AI to tag files based on metadata like file name, extension, size, and project ID, and to output a JSON array of objects.

Figure: The new prompt

The *FILE-AUTOTAG* prompt instructs the system to:

1. Select exactly one existing tag per file based on file metadata (file name, extension, uploader, project, linked document type and ID, existing tags)
2. Output a JSON object with the `@(Batch.BatchResult)` array of the `{ "fileId": "", "tag": "" }` objects

You can use only tags from the available list; if no appropriate tag exists, the file is skipped. Currently, the prompt analyzes only metadata (not file content).

If you change the prompt, the **Reset to Default** command appears on the Clipboard menu of the form toolbar. If you click the command, the system:

- Resets this prompt's name, instructions, and output format to its default state.
- Clears the **Active** check box.



The prompt cannot be deleted and doesn't support prompt testing—that is, the **Prompt Testing** button is unavailable.

When the *FILE-AUTOTAG* prompt is active and an LLM connection is configured, you can use autotagging while uploading new files. On the [Manage Project Files by Tag](#) (PM509000) and [Manage Project Files by Record Type](#) (PM509500) forms, file uploading automatically triggers the prompt.

With the *FILE-AUTOTAG* prompt active, you can autotag multiple existing files by using the new buttons on the [Manage Project Files by Tag](#) form, as shown below:

- **Autotag All:** Autotags all files currently displayed in the central pane. You can see the button when no files are selected.
- **Autotag:** Autotags the selected files in the central pane. You can see the button when at least one file is selected.



The system assigns suggested tags if you have a user role with the *Edit and Upload (Project Files)* or *Delete (Project Files)* access rights for the tags.

Manage Project Files by Tag
Project CSTRHOTEL - The Beach Hotel and Condos

Project: CSTRHOTEL - The Beach Ho...
Project Status: Active
Project Manager: KINLEARJOR - Jordan Kinlear
Project Start Date: 1/1/2026

Tags
All Files
All Tags
Architecture
Contracts
Pre-Construction
Project Management
Project Issues
Daily Field Reports
Untagged

Project Issues 6
Download All Delete Autotag All Switch to Tile View Upload Files

File Name	Version	Size	User	Date	Action
issues4.jpg	Ver. 1	156 KB	admin admin	1/16/2026	Project Issues
issues3.jpg	Ver. 1	2.04 MB	admin admin	1/16/2026	Project Issues
issues2.jpeg	Ver. 1	46 KB	admin admin	1/16/2026	Project Issues
issues for big.png	Ver. 1	44 KB	admin admin	1/16/2026	Project Issues

Figure: Autotagging all files

Manage Project Files by Tag
Project CSTRHOTEL - The Beach Hotel and Condos

Project: CSTRHOTEL - The Beach H...
Project Status: Active
Project Manager: KINLEARJOR - Jordan Kinlear
Project Start Date: 1/1/2026

Tags
All Files
All Tags
Architecture
Contracts
Pre-Construction
Project Management
Project Issues
Daily Field Reports
Untagged

Project Issues 6
Download Delete Assign Tags Untag Autotag Switch to Tile View Upload Files

File Name	Version	Size	User	Date	Action
issues4.jpg	Ver. 1	156 KB	admin admin	1/16/2026	Project Issues
issues3.jpg	Ver. 1	2.04 MB	admin admin	1/16/2026	Project Issues
issues2.jpeg	Ver. 1	46 KB	admin admin	1/16/2026	Project Issues
issues for big.png	Ver. 1	44 KB	admin admin	1/16/2026	Project Issues

Figure: Autotagging selected files

For details about AI Studio, see [Integration with LLM Providers: General Information](#).

What You Can Do Now

- Create project-specific tag templates that match different project workflows
- Gain better visibility into line-level document attachments
- Control how duplicate files are handled
- Mass-update file tags
- Use PDF annotation directly in the system

Upgrade Notes

After an upgrade to Acumatica ERP 2026 R1, if at least one tag (excluding **All Tags** and **Untagged**) was created on the *Configure Tags (SM202560)* form, the system does the following on the noted forms:

- On the [Project Tag Templates](#) (PM204500) form, creates a tag template with these settings:
 - **Template ID:** *DEFAULT*
 - **Description:** *Default project tag template*
 - **Active:** *Selected*
- On the **Document Tag Setup** tab of the [Projects](#) (PM301000) form, inserts this template in the **Tag Template** box for all projects.

Learn More

Need more details about file management? See [Managing Project Files](#).

Projects and Construction: Enhanced Two-Tier Change Management

With streamlined two-tier change management capabilities in Acumatica ERP 2026 R1, project-related changes are easier to organize and track from the moment they're introduced. You can set up the system to add a new project task on the fly when a change request or change order is created. And you can quickly identify which project tasks are linked to change orders and change requests.

Also, to better align project budget changes with customer expectations, you can consolidate multiple budget lines into a single change order line.



The new functionality depends on the features enabled on the [Enable/Disable Features](#) (CS100000) form:

- *Change Orders* for working with change orders
- *Change Orders and Change Requests* for working with change requests

Let's explore the new capabilities.

Default Common Tasks for Change Orders and Change Requests

You can configure the system to automatically create a new project task and associate it with each new change request or change order. The new project task is based on a common task—a task that's not associated with any project or project template and acts as a template for a new project task. If you've configured the system to create a new project task, it copies the common task's settings to this project task.

To set this up:

1. On the [Common Tasks](#) (PM208030) form, create common tasks to be used for change orders and change requests.
2. On the [Projects Preferences](#) (PM101000) form, specify these templates in the following new boxes, shown below:
 - **Common Task for Change Order**
 - **Common Task for Change Request**

These tasks will be inserted in the corresponding boxes by default when a new change order or change request is created.

The screenshot shows the 'Projects Preferences' form with the 'GENERAL' tab selected. The 'Numbering Sequence' section lists various sequences like 'Transaction Numbering Sequence' (PMTRAN) and 'Batch Numbering Sequence' (BATCH). The 'Default Settings' section, highlighted with a red box, includes fields for 'Non-Project Code' (X), 'Empty Item Code' (<N/A>), 'Empty Item UOM' (EA), 'Default Change Order Class' (DEFAULT), 'Common Task for Change Order' (COTASK), 'Common Task for Change Request' (CRTASK), and 'Default Quote Template'. Other sections include 'GL Settings for Unbilled Remainders', 'Drop-Ship Purchases', 'Account Settings', and 'Change Request Markups'.

Figure: Default common tasks for change orders and change requests

Project Task Generation for a Change Request

When a change request requires a dedicated project task to record costs or revenue separately, the system can automatically generate one when the change request is saved.

If a default common task for change requests is specified on the *Projects Preferences* (PM101000) form, the system does the following on the *Change Requests* (PM308500) form:

- Inserts this task in the new **Common Task for Change Request** box (Item 1 below). You can use this task, select another common task, or clear the box.
- Uses the common task as a template for the new project task that will be created. If the box is empty, the system will use the project's default task settings.

You enter the identifier to be used for the project task in the new **Change Request Task Nbr.** box (Item 2) so that the system can create the task. In a line on the **Estimation** tab, you can select it in the **Project Task** (Item 3) and **Revenue Task** columns.

Figure: Creating and selecting a project task for a change request

When you save the change request, the system creates the corresponding project task with the specified number and applies the selected settings. The **Change Request Task Nbr.** box becomes read-only.

Project Task Generation for a Change Order

As with change requests, when a change order requires a dedicated project task to record costs separately, the system can automatically generate one when the change order is saved.

If a default common task for change orders is specified on the [Projects Preferences](#) (PM101000) form, the system does the following on the [Change Orders](#) (PM308000) form:

- Inserts this task in the new **Common Task for Change Order** box (Item 1 below). You can use this task, select another common task, or clear the box.
- Uses the default task as a template for the new project task that will be created. If the box is empty, the system will use the project's default task settings.

You enter the identifier to be used for the project task in the new **Change Order Task Nbr.** box (Item 2) so that the system can create the task. You can select this task number in the change order lines even before the project task record exists (Item 3).

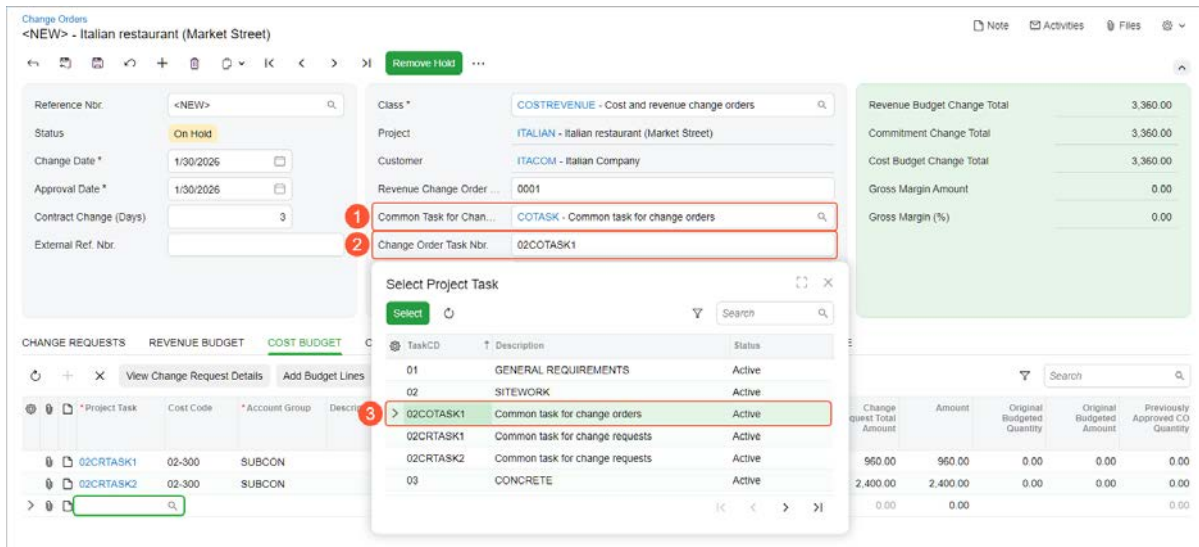


Figure: Creating and selecting a project task for a change order

When you save the change order, the system creates the corresponding project task with the specified number and applies the selected settings. The **Change Order Task Nbr.** box becomes read-only.

Numbering of Each Project's Change Requests

Now you can easily see the sequential number of each change request within a project. For each change request within a project, the system inserts a sequential number, such as 0001, in the new **Change Request Nbr.** box on the [Change Requests](#) (PM308500) form. You can change this number to any other string of up to 15 characters, which can include numbers, letters, and symbols.

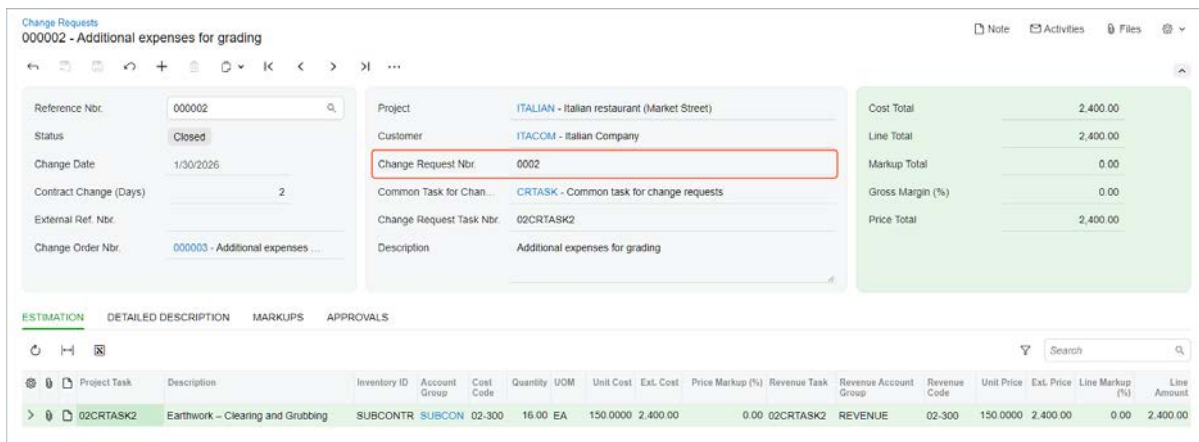



Figure: The change request number within the project

 Similarly, for each change order within a project, the system inserts a number in the renamed **Revenue Change Order Nbr.** box on the [Change Orders](#) (PM308000) form. It inserts 0001 for the project's first change order and numbers additional change orders of the project sequentially. You can change this number to any other string of up to 15 characters, which can include numbers, letters, and symbols.

Change Orders
000003 - Italian restaurant (Market Street)

Reference Nbr: 000003
Status: On Hold
Change Date: 1/30/2026
Approval Date: 1/30/2026
Contract Change (Days): 3
External Ref. Nbr:

Class: COSTREVENUE - Cost and revenue change orders
Project: ITALIAN - Italian restaurant (Market Street)
Customer: ITACOM - Italian Company
Revenue Change Order: 0001
Common Task for Chan: COTASK - Common task for change orders
Change Order Task Nbr: 02COTASK1
Description: Additional expenses for clearing the site

Revenue Budget Change Total: 7,560.00
Commitment Change Total: 3,360.00
Cost Budget Change Total: 4,000.00
Gross Margin Amount: 3,560.00
Gross Margin (%): 47.09

Project Task	Cost Code	Account Group	Description	Change Request Total Quantity	Quantity	UOM	Unit Rate	Change Request Total Amount	Amount	Original Budgeted Quantity	Original Budgeted Amount	Previously Approved CO Quantity	Previously Approved CO Amount
02CRTASK1	02-300	SUBCON		8.00	8.00	EA	0.0000	960.00	960.00	0.00	0.00	0.00	0.00
02CRTASK2	02-300	SUBCON		16.00	16.00	EA	0.0000	2,400.00	2,400.00	0.00	0.00	0.00	0.00
02COTASK1	02-300	SUBCON	Earthwork - Clearing and Grubbing	0.00	4.00	EA	160.0000	0.00	640.00	0.00	0.00	0.00	0.00

Figure: The renamed box

You can view a project’s latest change order and change request numbers on the **Summary** tab of the *Projects* (PM301000) form in the following boxes:

- **Last Revenue Change Order Nbr.** (the renamed box)
- **Last Change Request Nbr.** (the new box)

Projects
ITALIAN - Italian restaurant (Market Street)

Project ID: ITALIAN
Start Date: 2/1/2026
Customer: ITACOM - Italian Company
Description: Italian restaurant (Market Street)

Actual Income: 0.00
Actual Expenses: 1,030,241.16
Margin (%): 0.00

Project Properties:
Revenue Budget Level: Task and Cost Code
Cost Budget Level: Task and Cost Code
Project Group:
Time Activity Approver: EP00000033 - Ellen Watson
Last Revenue Change Order Nbr.: 0001
Last Change Request Nbr.: 0002
Inventory Tracking: Track by Project Quantity and Cost


Retainage:
Retainage Mode: Standard
Contract Total: 2,186,984.80
Completed (%): 0.00
Total Retained Amount: 0.00
Fixed Retainage:
Retainage with Steps:
Retainage (%): 5.000000

Figure: A project’s last change order and change request numbers

Finding a Project Task’s Source Change Order or Change Request

On the **Tasks** tab of the *Projects* (PM301000) form, you can quickly find and open the change document related to a project task in the following columns:

- **Original Change Order Nbr.:** The reference number of the change order, which is a link to it
- **Original Change Request Nbr.:** The reference number of the change request, which is a link to it

 The system automatically inserts these links for a project task that was initially created from the change order or change request.

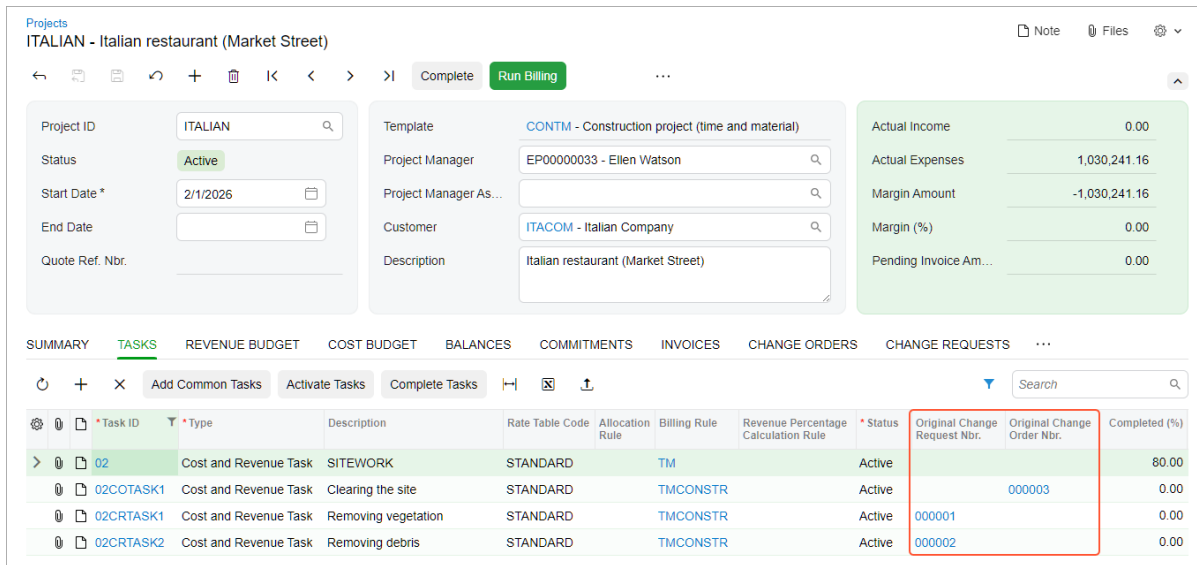


Figure: The links to change orders and change requests on the Tasks tab

You can also quickly open the related change document directly from a project task. To do this, you click the link in one of these new boxes on the *Project Tasks* (PM301000) form:

- **Original Change Order Nbr.**
- **Original Change Request Nbr.**

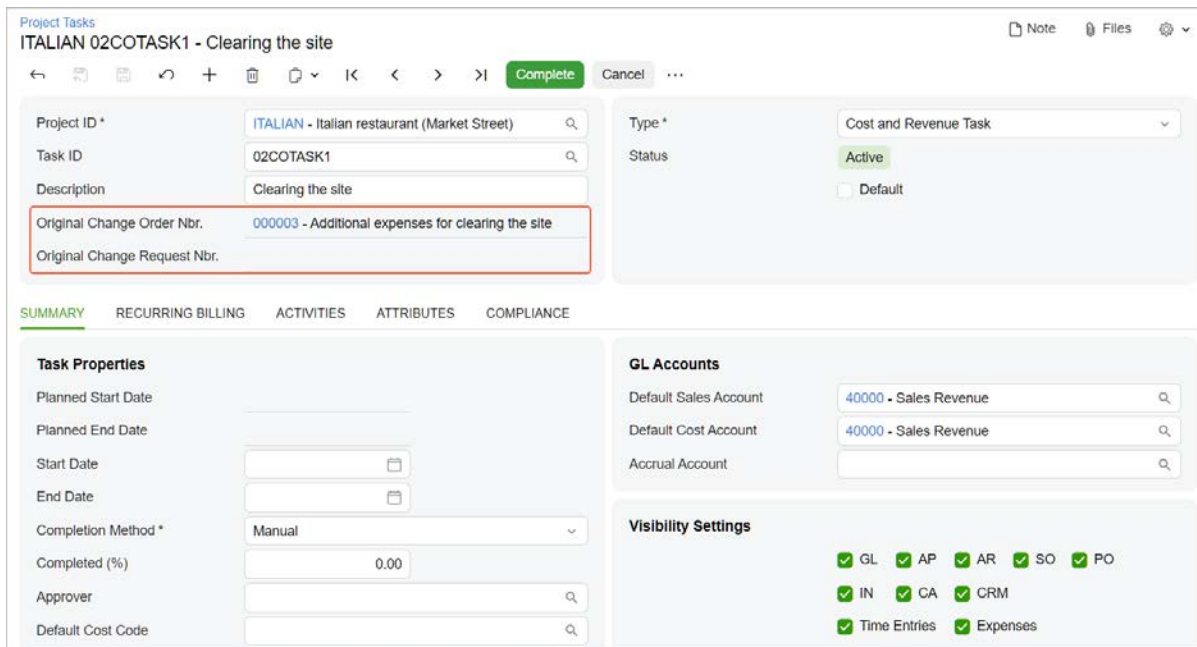


Figure: The new boxes

Manually Consolidating Revenue Budget Lines in a Change Order

You may need to perform multiple occurrences of work that fall under a single task agreed on with the customer. To align a change order's structure with the customer's expectations, you can now consolidate multiple change order lines on the **Revenue Budget** tab of the *Change Orders* (PM308000) form. To do this:

1. Enter the number for the new task in the **Change Order Task Nbr.** box (Item 1 below).

2. Click **Consolidate Lines** (Item 2) on the table toolbar of the **Revenue Budget** tab.
3. In the dialog box that opens, click **Consolidate** (Item 3).
4. Save your changes.

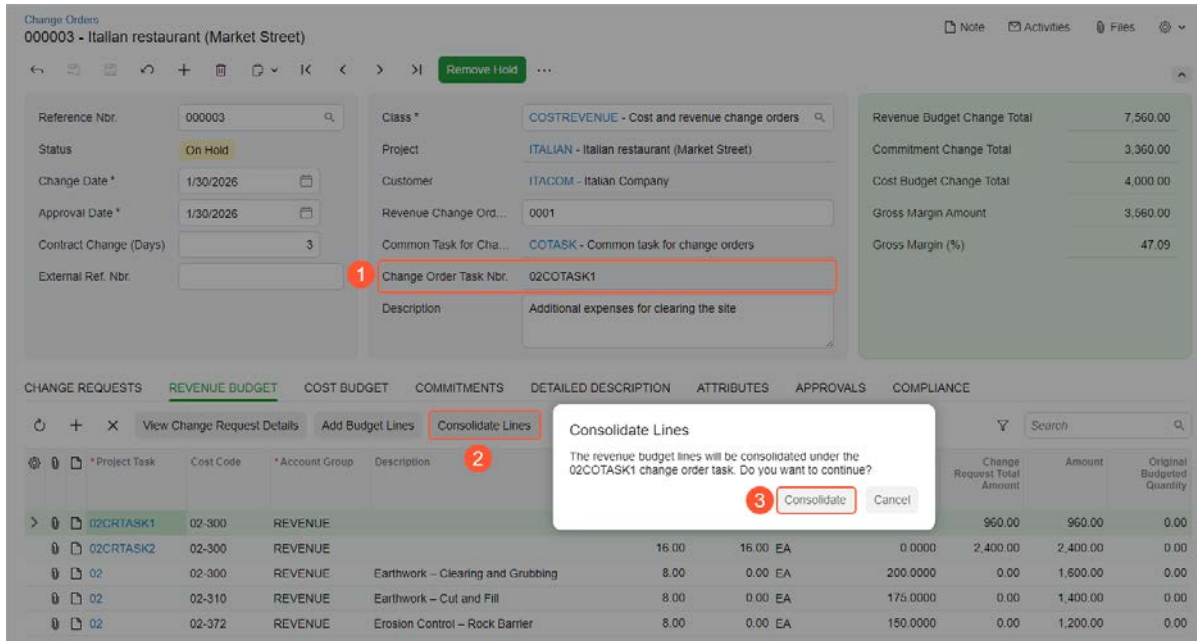


Figure: Consolidating lines in a change order task

The system consolidates the lines by the project budget key—that is, by project, project task, account group, and optionally, inventory item, and cost code. It inserts the change order task specified in the Summary area as the project task of the consolidated lines on the **Revenue Budget** tab (see below).

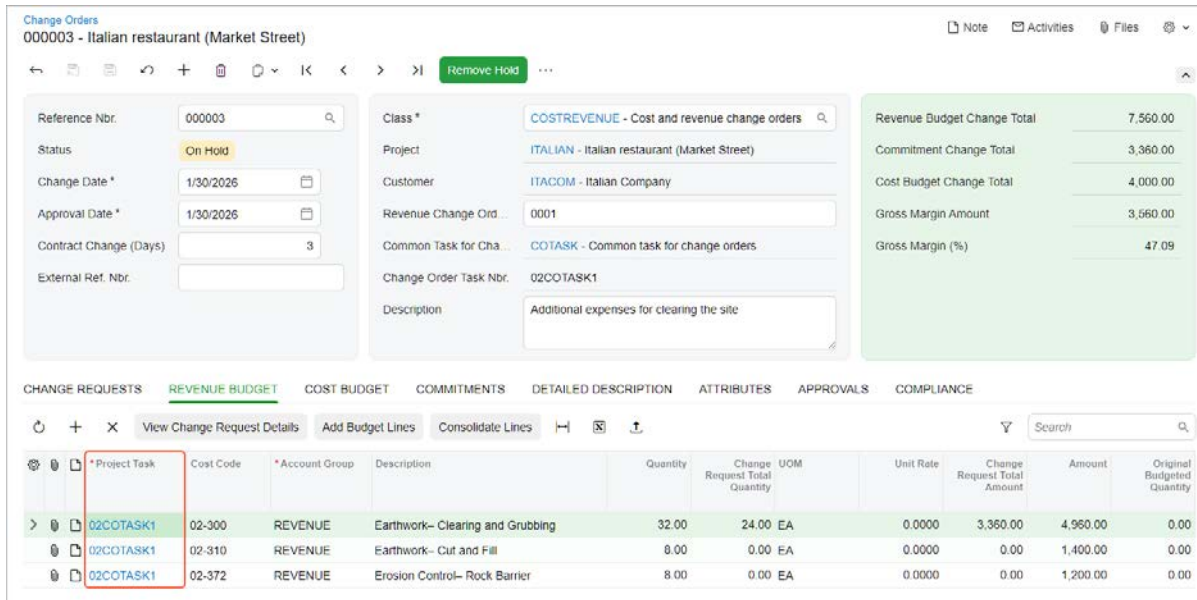


Figure: The consolidated lines

Automatically Consolidating Revenue Budget Lines

In addition to manual consolidation, you can configure the system to automatically consolidate revenue budget lines from change requests in a project task when they're added to a change order. To set this up, you select the new **Consolidate Change Request Lines by Project Task** check box on the *Projects Preferences* (PM101000) form.

Then when you add change requests to a change order on the *Change Orders* (PM308000) form, do the following:

1. Enter the number for the new task in the **Change Order Task Nbr.** box.
2. Add the change requests to the change order.

As a result, the system automatically consolidates the revenue budget lines by the project budget key.

Removal of a Change Request After Line Consolidation

If you remove a change request from a change order after its revenue budget lines have been consolidated, the system decreases the affected revenue budget line's quantity and amount.

Suppose that a change request's revenue budget lines have been consolidated into a revenue budget line of the change order. Then you remove the change request by clicking **Delete Row** on the **Change Requests** tab of the *Change Orders* (PM308000) form.

In this case, the system decreases the affected revenue budget line's quantity and amount by the values in the removed change request's estimation lines.

Selecting the Revenue Task on the Revenue Budget tab

You can now associate a revenue budget line from a change order or change request with the original project task on the *Projects* (PM301000) form. To do this, you select a project task of the *Revenue Task* or *Cost and Revenue Task* type in the new **Revenue Task** column on the **Revenue Budget** tab, shown below. (By default, it's the rightmost column; the screenshot shows it in a more visible place.)

Thus, you can track which original revenue budget line of the project is updated by the selected revenue budget line of the related change order or change request. You might find this information useful for reporting.

Project Task	Cost Code	Account Group	Description	Revenue Task	Original Budgeted Quantity	UOM	Unit Rate	Original Budgeted Amount	Potential CO Quantity	Potential CO Amount	Revised Budgeted Quantity
02	02-300	REVENUE	Earthwork - Clearing and Grubbing		320.00	EA	200.0000	64,000.00	0.00	0.00	320.00
02	02-310	REVENUE	Earthwork - Cut and Fill		160.00	EA	175.0000	28,000.00	0.00	0.00	160.00
02	02-372	REVENUE	Erosion Control - Rock Barrier		80.00	EA	150.0000	12,000.00	0.00	0.00	80.00
02COTASK1	02-300	REVENUE	Earthwork - Clearing and Grubbing	02	0.00		0.0000	0.00	0.00	4,960.00	0.00
02COTASK1	02-310	REVENUE	Earthwork - Cut and Fill	02	0.00		0.0000	0.00	0.00	1,400.00	0.00
02COTASK1	02-372	REVENUE	Erosion Control - Rock Barrier	02	0.00		0.0000	0.00	0.00	1,200.00	0.00
02CRTASK1	02-300	REVENUE		02	0.00		0.0000	0.00	0.00	0.00	0.00
02CRTASK2	02-300	REVENUE		02	0.00		0.0000	0.00	0.00	0.00	0.00

Figure: The Revenue Task column

Changing a Project Task Identifier

You may need to change a project task's identifier to make it more specific or correct a mistake. To do this, you click the new **Change ID** command on the More menu of the [Project Tasks](#) (PM301000) form. You can change the identifier of any project task, including the one added along with a new change order or change request.

The screenshot shows the 'Project Tasks' form for 'ITALIAN 02CRTASK1 - Removing vegetation'. The form includes fields for Project ID, Task ID, Description, and Original Change Order/Request Numbers. A 'More' menu is open, showing options like 'Processing', 'Other', 'Activate', 'Hold', 'Complete', and 'Cancel'. The 'Change ID' option is highlighted with a red box. Below the form, there are sections for 'Task Properties', 'GL Accounts', and 'Visibility Settings'.

Figure: The new command on the More menu

When you click the **Change ID** command, the **Specify New ID** dialog box opens, and you can enter a new identifier in the **Task ID** box and confirm the changes. The system will automatically update the task identifier in the project budget and in all documents where this task is used.

Selecting a Commitment Type in a Change Request

With the **Create Commitment** check box selected in an estimation line on the [Change Requests](#) (PM308500) form, you can now select one of the following in the new **Commitment Type** column, as shown below:

- *Normal Purchase Order*
- *Project Drop-Ship*
- *Subcontract* (if subcontracts are used in your system)



If you don't select the commitment type, the *Normal Purchase Order* commitment type will be automatically assigned to the created commitment line.

Figure: Selecting a commitment type

When you add this change request to a change order, the system adds a new commitment line with the selected commitment type on the **Commitments** tab of the *Change Orders* (PM308000) form. After the change order is released, the system creates a new commitment based on this line.

Capturing Changes in the Mobile App

With the updated functionality for projects in the Acumatica mobile app, you can capture and manage project-related changes directly from the project site and immediately generate related project tasks and commitments.

New Project Task for a Change Request: While adding a new change request on the *Change Request* screen, you can create a dedicated project task for it:

1. Enter the task's identifier in the new **Change Request Task Nbr.** field.
2. Select this identifier on the **Estimation** tab.
3. Save your changes. The project task is created.

If a common task is specified in the new **Common Task for Change Request** field, the system uses it as a template for the new project task. In the **Change Request Nbr.** field, you can also view or change the sequential number of the change request within the project.

Change Request

Refe... Additional flatwork Cost Total: 0.00
 Status: On Hold Price Total: 0.00

Remove Hold

Summary Estimation Markups

Project *
 Italian restaurant (Market Street)

Change Date *
 15 Jan 2026

Description
 Additional flatwork

Common Task for Change Request
 Common task for change requests

Change Request Task Nbr.
 CRTASK1

Change Request Nbr.
 0001

Change Order Nbr.

Line Total	Markup Total
0.00	0.00

Details

Figure: New elements on the Change Request screen

Commitment Type Selection: If you want to create a commitment for the change request right away, you can select the commitment type directly in the mobile app. By default, *Normal Purchase Order* is selected.

Cancel Estimation Update

Project Task *
Common task for change requests

Account Group
SUBCON

Create Commitment

Commitment Type
Normal Purchase Order

Cost Code * Inventory ID
02-200 -
Site-
Preparation

Commitment Type

Normal Purchase Order

Project Drop-Ship

Subcontract

Clear Done

Figure: Selection of a commitment type

New Project Task for a Change Order: When you're adding a new change order in the field, you can create a dedicated project task. On the *Change Order* screen:

1. Enter the identifier in the **Change Order Task Nbr.** field.
2. Select this identifier in a change order line.
3. Save the change order. The project task is created.

If a common task is specified in the new **Common Task for Change Order** field, the system uses it as a template for this new project task.

Change Order

Reference Nbr.: 000003
 Status: **Open**
 Customer: **EQUGRP**
 Revenue Budget Change Total: **2,500.00**
 Cost Budget Change Total: **2,112.00**

Summary Change Requests Revenue Budget

Project *
 The Beach Hotel and Condominiums
 (Warner Street)

Class *
 COSTREVENUE - Cost and revenue
 change orders

Change Date *
 30 Jan 2026

Approval Date *
 30 Jan 2026

Description
 Additional flatwork expenses

Common Task for Change Order
 Common task for change orders

Change Order Task Nbr.
 COTASK1

Revenue Change Order Nbr.
 0001

Figure: *New elements on the Change Order screen*

Line consolidation: If multiple scope changes should appear as a single line for the customer, you can consolidate revenue budget lines of a change order directly in the mobile app. To do this:

1. Enter the number for the new task in the **Change Order Task Nbr.** field.
2. Tap **Consolidate Lines** on the **Revenue Budget** tab.

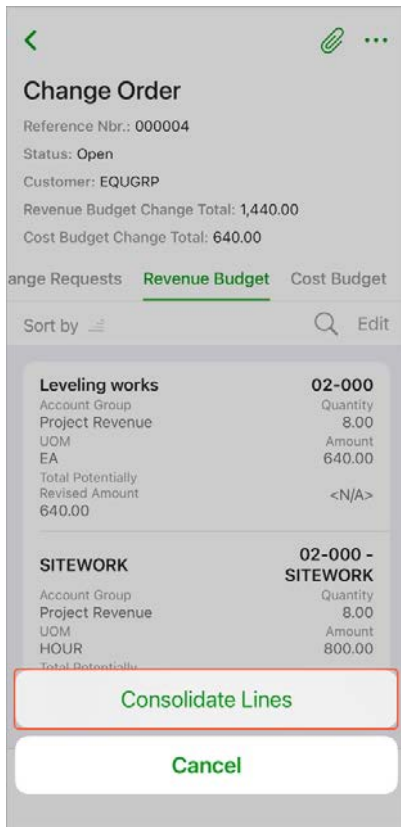


Figure: The Consolidate Lines command

3. In the dialog box, tap **Consolidate**.

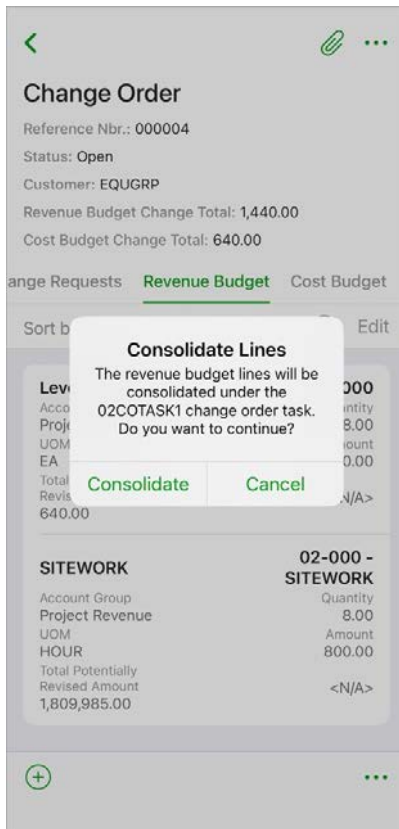


Figure: The Consolidate Lines dialog box

4. Save the changes.

With these enhancements, project managers and field staff can record changes, generate related tasks, and initiate commitments immediately—helping keep project and budget data up to date in real time.

What You Can Do at a Glance

- Automatically create a dedicated project task while entering a change request or change order
- Use project-specific numbering for change requests for easy tracking
- Quickly locate and open a source change document for each task by clicking the link to the original change order or change request
- Consolidate revenue budget changes manually or automatically to record changes in ways that meet customer expectations
- Link a revenue budget line of a change order or change request to the original project budget line
- Change project task identifiers as needed
- Define the type of the commitment to be created at the time you submit a change request

Learn More

You might find these topics on change orders and change requests helpful:

- [Change Requests: General Information](#)
- [Single-Tier Change Management: General Information](#)

Projects and Construction: Forecasting Costs by Quantity and Unit Rate

In Acumatica ERP Construction Edition 2026 R1, date-sensitive cost projections now support forecasting based on the quantity and unit rate. This lets you **estimate project costs based on** the remaining **quantity** of work along with the projected **unit rate**. You can still estimate project costs based on total amounts, as you could in earlier releases of Acumatica ERP Construction Edition.



The date-sensitive cost projection functionality is available if the *Construction* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Let's explore how you set up and use this functionality.

Setting Up Calculation by Quantity and Unit Rate

To forecast a project's costs by quantity and unit rate, you must set up this calculation for the project and, if applicable, for the relevant account groups.

To configure this at the account group level, you select the new **Calculate Projected Cost by Quantity** check box on the [Account Groups](#) (PM201000) form. You do this for each expense account group used in the project's cost budget lines included in the cost projection.



By quantity means by quantity and unit rate; the system uses these values in tandem for quantity-based calculations.

Account	Type	Account Class	Description	Default
> 54100	Expense	COGS	Project Labor Expense	<input type="checkbox"/>

Figure: The new check box on the Account Groups form

To forecast the project's costs by quantity, you also need to select the new **Calculate Projected Cost by Quantity** check box on the [Projects](#) (PM301000) form. You'll find this check box on the **Summary** tab, as shown below.

Actual Income 12,807,479.84
Actual Expenses 12,656,859.56
Margin (%) 1.18

Project Properties

Revenue Budget Level: Task and Cost Code
 Cost Budget Level: Task and Cost Code
 Project Group: [Search]
 Time Activity Approver: EP00000033 - Ellen Watson
 Last Revenue Change Nbr.: [Text]
 Inventory Tracking: Track by Project Quantity and Cost

Allow Issue from Free Stock
 Change Order Workflow
 Allow Adding New Items on the Fly
 Restrict Employees
 Restrict Equipment
 Track Production Data
 Certified Job
 Calculate Projected Cost by Quantity


Retainage

Retainage Mode: Standard
 Include CO
 Contract Total: 39,715,457.00
 Completed (%): 32.25
 Total Retained Amount: 640,374.00
 Fixed Retainage
 Retainage with Steps
 Retainage (%): 5.000000

AIA

AIA Level: Summary
 Last Application Nbr.: 0002
 Show Quantity in AIA Report

Figure: The new check box on the Projects form

 Also, you can select the **Calculate Projected Cost by Quantity** check box on the [Project Templates](#) (PM208000) form for any project. This check box will be selected for each project based on this template.

The Resulting Cost Projection Settings

For a project configured to calculate projected costs by quantity, the system does the following for the project's cost projection on the [Cost Projection by Date](#) (PM305500) form:

- Selects the **Calculate Projected Cost by Quantity** check box in the Summary area (Item 1 below).
- On the **Details** tab, displays new columns showing values based on quantity and unit rate.
- If account groups are included in the cost projection's budget level (Item 2), selects the **Calculate by Quantity** check box (Item 3) for each line with an account group that has the **Calculate Projected Cost by Quantity** check box selected.

Cost Projection By Date
000002 - The Beach Hotel and Condominiums

Reference Nbr: 000002
Project*: HOTELSM - The Beach Hotel and Condominiu...
Project Manager: Ellen Watson
Status: On Hold
Date*: 6/1/2026
Projection Date*: 6/1/2026

Budget Level
 Project Task
 Account Group
 Inventory ID
 Cost Code

Calculation Settings
 Include Pending CO in Calculations
 Update Project Budget
 Calculate Projected Cost by Quantity

Summary

Revised Budget Revenue	39,715,457.00
Billed Revenue	12,807,479.84
Revenue Budget Backlog	26,907,977.16
Expected Current Revenue	13,355,695.74
Overbilling or Underbilling	-548,215.90
Projected Margin	2,125,249.09
Projected Margin (%)	5.35

DETAILS APPROVALS

View Transactions View Commitments View Open Commitments View Finance Chart Upload from Projection Refresh Lines

Proj. Task	Account Group	Cost Code	Calculate by Quantity	Description	UOM	Projected Quantity to Complete	Projected Unit Rate to Complete	Projected Cost to Complete	Projected Quantity at Completion	Projected Unit Rate at Completion	Projected Cost at Completion	Completed by Quantity (%)	Completed (%)	Revised Budgeted Quantity	Revised Budgeted Unit Rate	Revised Budgeted Cost
01	LABOR	01-311	<input checked="" type="checkbox"/>	Operations- Project Manager	HOURL	24.00	10,000.0000	240,000.00	24.00	10,000.0000	240,000.00	0.00	0.00	24.00	10,000.0000	240,000.00
01	LABOR	01-313	<input checked="" type="checkbox"/>	Operations- Superintendent	HOURL	24.00	9,000.0000	216,000.00	24.00	9,000.0000	216,000.00	0.00	0.00	24.00	9,000.0000	216,000.00
01	MISC	01-300	<input type="checkbox"/>	Permits	HOURL			0.00			15,000.00		100.00	1.00	15,000.0000	15,000.00
						177.00		24,846,200.67	177.00		37,590,207.91	0.00	33.63	177.00		29,541,929.71

Figure: The settings of a quantity-based cost projection

Creating a Quantity-Based Cost Projection

You can create a fully quantity-based cost projection or a mixed one, with some lines projected by quantity and others by cost. To forecast project costs by quantity and unit rate on the [Cost Projection by Date](#) (PM305500) form, you need to:

1. Ensure that the **Calculate Projected Cost by Quantity** check box in the Summary area is selected. If it's cleared, select it manually.
2. Check that the **Calculate by Quantity** check box is selected for each line whose costs should be calculated by quantity and unit rate. If it's cleared, select it manually.

Calculations by Quantity and Unit Rate in a Cost Projection

With the **Calculate Projected Cost by Quantity** check box selected on the [Cost Projection by Date](#) (PM305500) form, you can forecast a project's costs to complete and cost at completion based on quantity and unit rate. For each line with the **Calculate by Quantity** check box selected, the system calculates:

- Projected costs and the cost completion percentage based on quantity, unit rate, and quantity completion percentage.
- Projected quantities and the quantity completion percentage.
- Various unit rates, such as the actual unit rate to date and the projected unit rate at completion. You can compare these rates with the projected unit rate you use for cost calculation.

Because the **Calculate by Quantity** check box is selected in the line, the **Projected Cost to Complete** and **Projected Cost at Completion** are read-only. If you need to adjust costs based on the quantity and unit rate, you can change the following column values, as shown below:

- **Projected Quantity to Complete**
- **Projected Unit Rate to Complete**
- **Projected Quantity at Completion**
- **Completed by Quantity (%)**

Figure: Editable new column values


If you change any of these values, the projected values will be recalculated.

If the cost budget level of the project and cost projection are the same (for example, account group, cost code, and project task), you can see the description of the project's cost budget lines in the new **Description** column. Also, if a unit of measure is specified in a cost budget line, you can see it in the new **UOM** column. Otherwise, the **UOM** column is empty for the line.

Quantity and Unit Rate Buckets in Cost Projections

On the *Cost Projection by Date* (PM305500) form, you can review values related to quantity and unit rate in the new columns of the following buckets, shown below:

- Budgeted (Item 1 below): **Revised Budgeted Quantity** and **Revised Budgeted Unit Rate**
- Actual (Item 2): **Actual Quantity to Date** and **Actual Unit Rate to Date**
- Committed (Item 3): **Open Committed Quantity** and **Open Committed Amount**
- Potential: **Pending CO Quantity**, **Pending CO Unit Rate** (if you use change orders in your system)



If you want calculations to include unreleased change order amounts related to the project's cost budget lines, select the **Include Pending CO in Calculations** check box in the Summary area. These amounts will be added to the anticipated values.

Additionally, you can view:

- The anticipated quantity and unit rate based on existing commitments—purchase orders, subcontracts, and project drop-ships: The **Anticipated Quantity** and **Anticipated Unit Rate** columns (Item 4)
- The quantity-related performance percentage: The **Quantity Performance (%)**, **Anticipated Quantity Performance (%)** columns (Items 5 and 6)
- The variance amounts: The **Projected Quantity Variance** and **Projected Cost Variance** columns (Item 7)

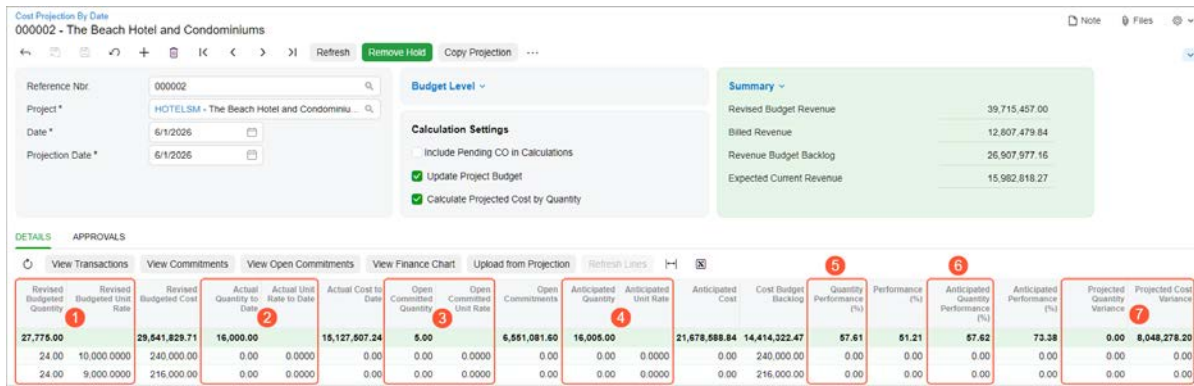


Figure: Budget values based on quantity and unit rate

Forecasting Quantity-Based Costs Using Cost Projection: Example

Picture this: Your company is a contractor building a hotel. You track material costs by amount and subcontractor work by hours for your project. The subcontractor's progress is calculated by quantity (hours worked).

To use the quantity-based forecasting for the project's costs, you have selected the **Calculate Projected Cost by Quantity** check box for the *SUBCON* account group on the *Account Groups* (PM201000) form. Because you track the subcontractor's work hours by quantity, you've selected the **Calculate Projected Cost by Quantity** check box for the project on the *Projects* (PM301000) form.

The project started in March 2026. The concrete works were partially done, but at the beginning of June, you had to hire a new subcontractor to complete them. The unit rate of their labor costs has slightly increased:

- From \$160.00 to \$162.00 per hour for Cast-In-Place (CIP) slab installation
- From \$86.50 to \$87.00 per hour for rough carpentry

You need to estimate how these expenses will affect the project cost budget. On June 10, you've created a cost projection on the *Cost Projection by Date* (PM305500) form. In the **Projected Unit Rate to Complete** column (Item 1 below), you've entered the current unit rates for the labor. Now you can review the projected values:

- The projected cost to complete has increased by \$20,000 (Item 2).
- The projected quantity at completion remains the same because no additional hours are needed (Item 3).
- The unit rate at completion for all the hours has slightly increased (Item 4).
- The projected cost at completion has increased by \$20,000 (Item 5).
- The actual unit rate and actual cost to date are available for your reference (Item 6).

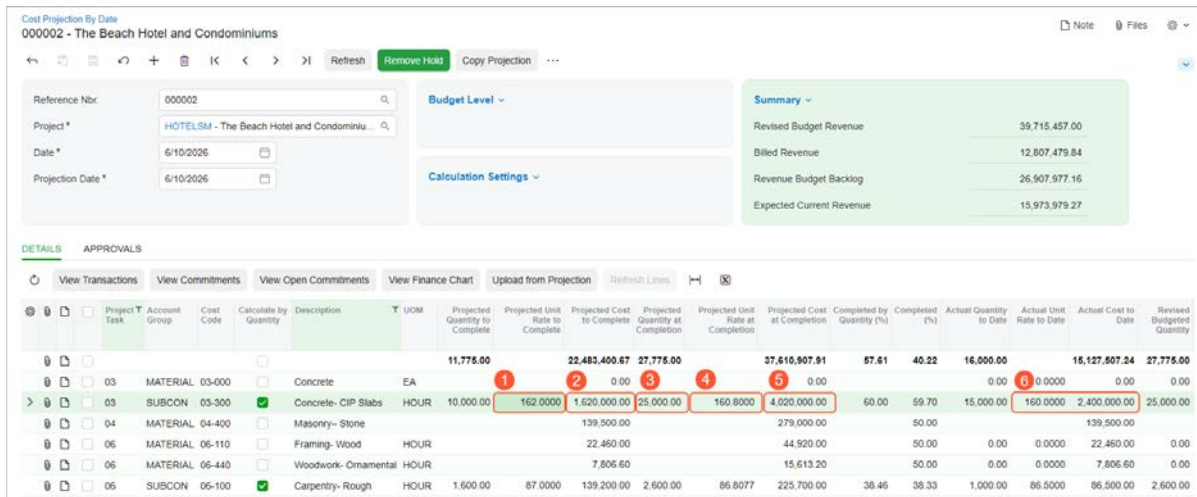


Figure: The cost projection with the updated values

Now that you've estimated the costs, you're ready to release the cost projection to get the most precise cost information in your project budget.

Key Capabilities

- **Quantity-based forecasting:** Calculate projected costs for work by remaining quantity and projected unit rate.
- **Combined cost projections:** Include both amount-based and quantity-based lines in the same cost projection.
- **Project budget insight:** Review budgeted, actual, committed, and potential quantities along with quantity performance and variance.

Learn More

Need more details about cost projections? See [Project Cost Projections: Date-Sensitive Cost Projections](#).

Projects and Construction: Material Management

A project may require materials that you need to plan before work begins. By budgeting materials and managing them properly, you can ensure that the project runs smoothly and that all the materials are available on time. Now you can manage everything in one place instead of maintaining a project's material list outside the system—and you don't need to switch between the project budget, purchase orders, receipts, and issues to keep the materials on track.

In Acumatica ERP 2026 R1, the new [Project Materials](#) (PM306500) form gives you full visibility into project materials throughout their lifecycle.

Each material listed on the form is linked to the project budget key, so actual costs stay aligned with the related budget lines and commitments. You can reserve stock items, purchase items to be delivered to a warehouse, or have items delivered to the project site while you track the materials through fulfillment.

Each material line represents one material requirement—that is, a specific stock or non-stock item and the quantity needed for a specific project task. In each material line, you can view the project task, account group, and cost code. This makes it easy to track each material's costs against the corresponding budget line and monitor commitments and actual costs in the project budget.



- The [Project Materials](#) form is available in the Modern UI if the new [Material Management](#) feature in the [Projects](#) feature group is enabled on the [Enable/Disable Features](#) (CS100000) form.
- You can enable the [Material Management](#) feature only if the [Inventory](#) feature is enabled.

What You Can Do on the Project Materials Form

The [Project Materials](#) (PM306500) form serves as a centralized location for managing and tracking all the materials in one place—as well as for monitoring fulfillment as related documents are processed. From the form, you can create a purchase order or material issue for a line.

The screenshot shows the 'Project Materials' form. At the top, there are fields for Project (HOTEL - The Beach Hotel and Condomin...), Start Date (3/1/2026), End Date, and Quote Ref. Nbr. Below these are fields for Project Manager (EP0000033 - Ellen Watson), Customer (EQUGRP - The Equity Group Investors), and Description (The Beach Hotel and Condominiums (Warner Street)).

A summary table on the right shows:

Required Qty.	1,641.00
Estimated Total Cost	5,064.0000
Total Budgeted Amount	2,134,625.0000
Estimated Variance	2,129,561.0000

The 'DETAILS' section contains a table with columns: Branch, Inventory ID, Description, Warehouse, Required Qty, UOM, Unit Cost, Ext. Cost, Qty. on Orders, Qty. Awaiting Delivery, Qty. to Order or Allocate, Qty. Procured, Qty. Available for Dispatch, Qty. on Dispatch, Qty. Used, Status, and Provisioning Doc. Ref. Nbr.

Branch	Inventory ID	Description	Warehouse	Required Qty	UOM	Unit Cost	Ext. Cost	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate	Qty. Procured	Qty. Available for Dispatch	Qty. on Dispatch	Qty. Used	Status	Provisioning Doc. Ref. Nbr.	
TBGROUP	CONCRBK6	Concrete blocks, 8...	TGCONSTR	1,000.00	PIECE	1.7500	1,750.0000	0.00	0.00	1,000.00	0.00	0.00	0.00	0.00	0.00	Pending Procurement	
TBGROUP	FORMTIES	Concrete form ties...	TGCONSTR	40.00	BOX	1.3500	\$4.0000	40.00	40.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal, 000056
TBGROUP	CONCRBK6	Concrete blocks, 6...	TGCONSTR	400.00	PIECE	1.6500	660.0000	400.00	400.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal, 000056
TBGROUP	ANCHBS512	Anchor bolts, 5/8"	TGCONSTR	200.00	PIECE	4.5000	900.0000	200.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal, 000056
TBGROUP	FORMPNL48	Form plywood pan...	TGCONSTR	1.00	PALLET	1,700.0000	1,700.0000	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	Pending Procurement	

At the bottom, a summary bar shows: Project Total: On Hand 0.00/1,000.00 PIECE, Available 0.00/2,000.00 PIECE, Available for Shipping 0.00/1,000.00 PIECE, Available for Issue 0.00/1,000.00 PIECE.

Figure: The Project Materials form

On this form, you can:

- Build and maintain the project's consolidated material list
- Track project materials against budget lines by linking a project task, account group, and cost code to each material requirement
- Specify the provisioning source for each material line—use available stock, purchase the material to the warehouse, or drop-ship the material directly from the vendor to the project site

- Purchase materials for a project or allocate available materials in a warehouse
- Monitor the status of each project material throughout ordering, delivery, and issuing
- View all purchasing and inventory documents related to project's materials in one place

Selecting the Default Reason Code and Reporting Group

Before you start creating projects' material lists, you need to select the reason code for issuing project materials in the new **Default Issue Reason Code** box on the [Projects Preferences](#) (PM100000) form. You do this to indicate that the items have been issued for a project and to provide the posting accounts for the generated inventory issue transaction. The system will insert this reason code in each line of:

- An inventory issue on the [Issues](#) (IN302000) form
- A new document of the *Material Issue* type on the [Shipments](#) (SO302000) form



In this topic, we'll refer to this new document as a *material issue*.

The screenshot shows the 'Projects Preferences' form with the 'GENERAL' tab selected. The 'Material Management' section is highlighted, and the 'Default Issue Reason Code' field is set to 'INISSUEPROJ - Direct Issues for Projects'.

Field	Value
Transaction Numbering Sequence *	PMTRAN - PM Transaction Numbering
Batch Numbering Sequence *	BATCH - GL Batch
Pro Forma Numbering Sequence *	PROFORMA - PM Pro Forma Invoice Nu...
Change Order Numbering Sequence *	CHANGEORD - PM Change Order Numb...
Quote Numbering Sequence *	PMQUOTE - Quotes in Project
Progress Worksheet Numbering Se...	PROGRESSWS - Progress Worksheet
Cost Projection by Date Numbering ... *	COSTPROJ - PM Cost Projection Number...
WIP Adjustment Numbering Sequen... *	WIPADJUST - PM WIP Adjustment Numb...
Non-Project Code *	X
Empty Item Code *	<N/A>
Empty Item UOM *	EA
Default Issue Reason Code	INISSUEPROJ - Direct Issues for Projects
Expense Account Source *	Labor Item
Expense Accrual Account Source *	Labor Item Accrual

Figure: The default reason code for project materials

On the [Account Groups](#) (PM201000) form, you need to select the *Material* reporting group for expense account groups that you'll use in cost budget lines related to project materials. Selecting this option makes the system calculate the total budgeted amount for the materials related to cost budget lines with this account group on the new [Project Materials](#) (PM306500) form, described below.

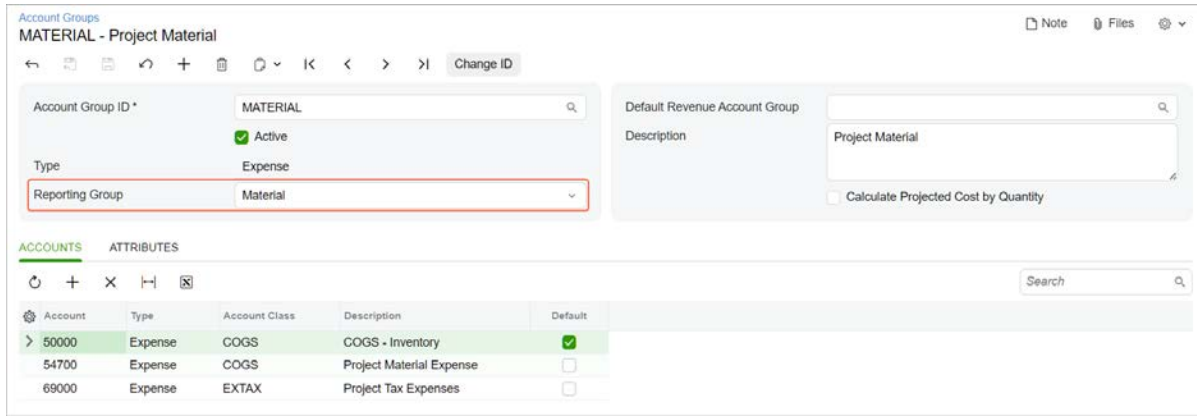


Figure: The reporting group for the account group

Setting Up Availability Calculation Rules

To be able to track available project materials, you set up the needed availability calculation rules. An availability calculation rule defines which plan types affect the calculation of available quantities of inventory items in the system.

Each document that affects inventory creates one or more *item plans*—system records that represent future increases or decreases in item quantity. Each item plan has a *plan type*, which determines how that planned quantity affects item availability. For example, depending on the plan type, the available item quantity may decrease when you allocate project materials or increase when you purchase project materials.

When you create an availability calculation rule on the [Availability Calculation Rules](#) (IN201500) form, you can now specify how item plans related to material lines affect item availability calculation. To do this, you select or clear the new check boxes, shown below.

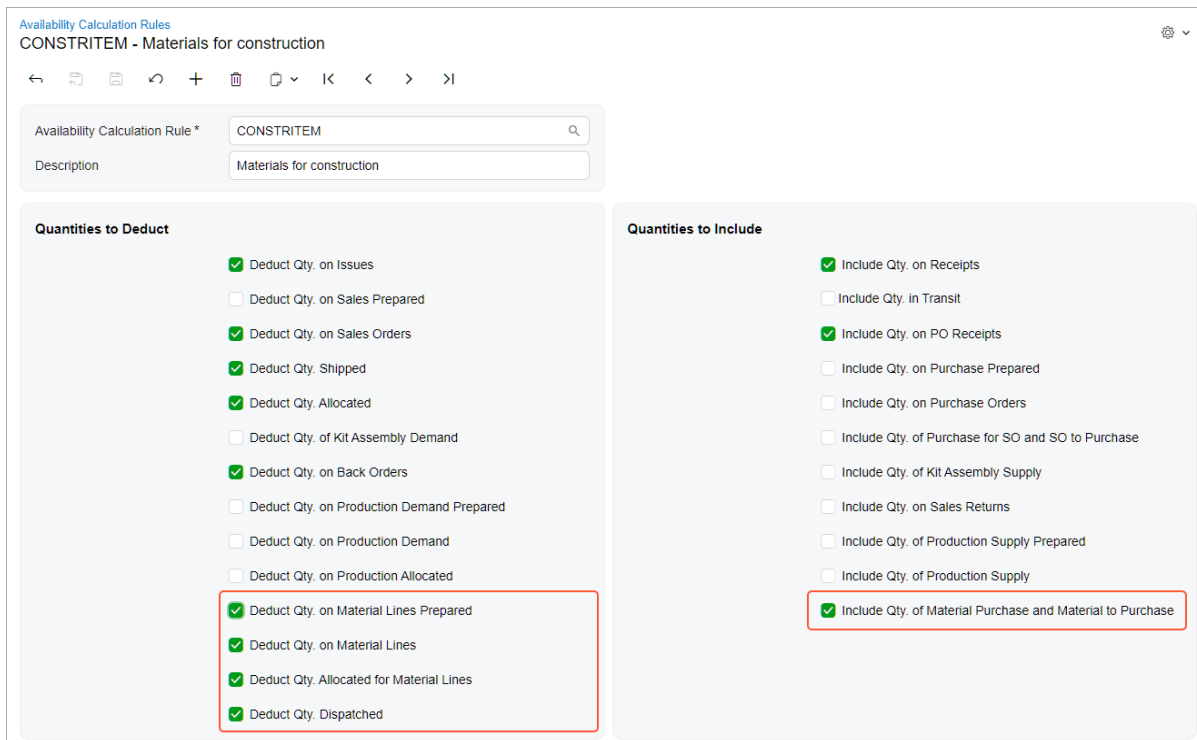


Figure: The new check boxes on the Availability Calculation Rules form

Once the rule has been set up, you specify it in the **Availability Calculation Rule** box on the [Item Classes](#) (IN201000) form for the item class used to create project materials. For details, see [Availability Calculation Rules: General Information](#).



To view how an inventory item is distributed across warehouses and warehouse locations, you use the [Inventory Allocation Details](#) (IN402000) form.

Creating a Project's Material List

Once the setup steps have been performed, you use the [Project Materials](#) (PM306500) form to create the material list for a specific project.

To get started, you select a project in the Summary area. The system shows the project's basic information along with the budgeted quantities and costs of the materials. This information helps you connect material planning to the cost budget. Then on the **Details** tab, you add the project's material lines.

The screenshot shows the 'Project Materials' form. The 'Summary' tab is active, displaying project information for 'HOTEL - The Beach Hotel and Con...'. Key fields include Project Manager (EP00000033 - Ellen Watson), Customer (EQUGRP - The Equity Group Inves...), and Description (The Beach Hotel and Condominiums (Warner Street)). A summary table on the right shows: Required Qty. (0.00), Estimated Total Cost (0.0000), Total Budgeted Amount (2,134,625.0000), and Estimated Variance (2,134,625.0000). The 'DETAILS' tab is also visible, showing a table with columns for Branch, Inventory ID, Description, Warehouse, Required Qty., UOM, Unit Cost, Ext. Cost, and various quantity fields (Qty. on Orders, Qty. Awaiting Delivery, Qty. to Order or Allocate, Qty. Procured, Qty. Available for Dispatch, Qty. on Dispatch, Qty. Dispatched).

Figure: Creating a material list for a project

Populating the Project's Material List

You populate material lines on the **Details** tab of the [Project Materials](#) (PM306500) form by adding:

- The project's cost budget lines
- Stock items or non-stock items that require receipt and shipment
- The associated project quote's estimation lines

The following sections describe each option.

Adding Materials from Cost Budget Lines

If the project status is *In Planning* or *Active*, you can create or expand the project's material list based on cost budget lines.

To add the project's cost budget lines to the material list on the [Project Materials](#) (PM306500) form:

1. Click **Add Budget Lines** (Item 1 below).
2. In the dialog box, select the needed cost budget lines (Item 2).
3. Click **Add Lines & Close** (Item 3).

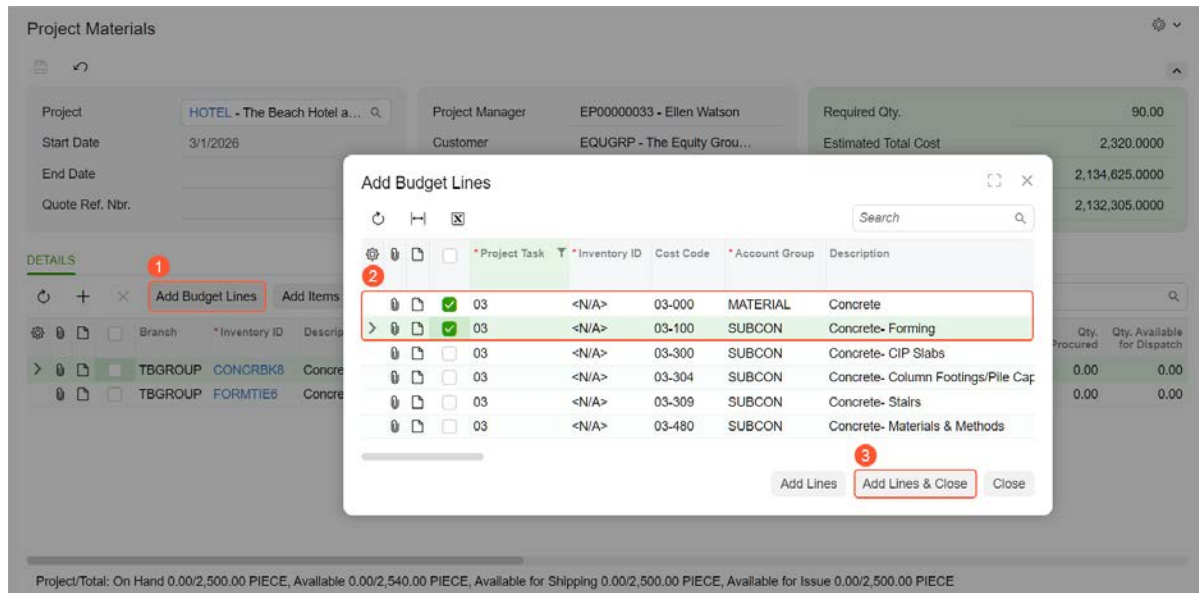


Figure: Adding cost budget lines to the material list

If project costs aren't budgeted at the item level—that is, the **Inventory ID** column has *N/A* on the **Cost Budget** tab of the *Projects* (PM301000) form—this column remains empty in the added material lines on the *Project Materials* form.

Adding Items to the Project's Material List Directly

On the *Project Materials* (PM306500) form, you can create or expand a project's material list by using the **Inventory Lookup** dialog box. This dialog box shows item availability across warehouses and locations and lets you add multiple stock items at a time to the project materials. To add items in this way:

1. Click the needed line.
2. Click **Add Items** on the table toolbar (Item 1 below).
3. In the **Inventory Lookup** dialog box, which opens, select items and specify their quantities (Item 2).
4. Click **Add & Close** (Item 3).
5. Save your changes.

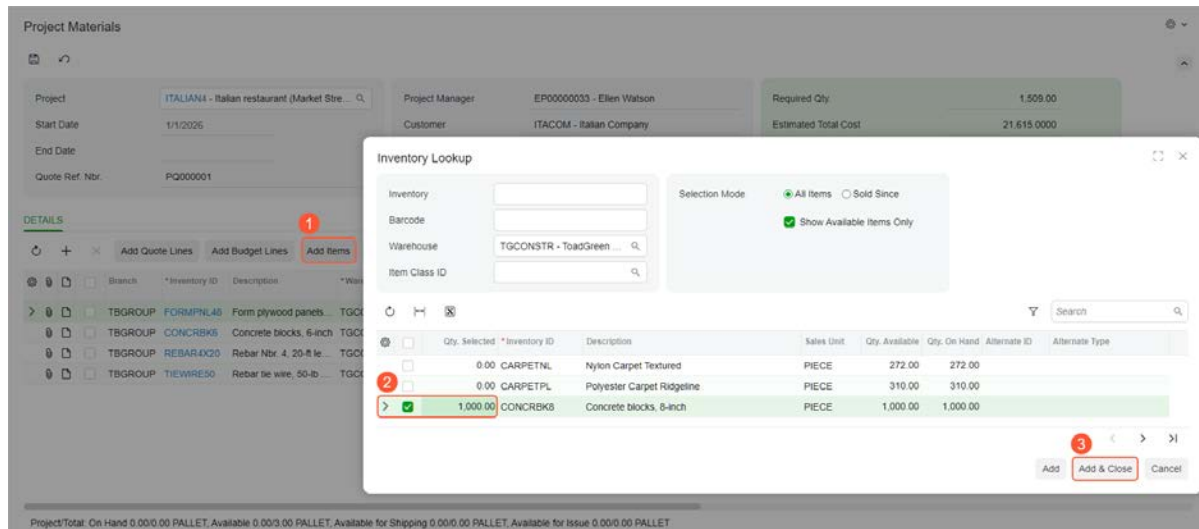


Figure: Adding an item by using the Inventory Lookup dialog box

You can also add items manually. In the **Inventory ID** column, you can select:

- A stock item created on the [Stock Items](#) (IN202500) form
- A non-stock item created on the [Non-Stock Items](#) (IN202000) form with the **Require Receipt** and **Require Shipment** check boxes selected

Adding Materials from Quote Estimation Lines

The project quote may have more detailed material requirements than the project budget does. In this case, you can create the project's material list from the project quote's estimation lines. For a project created from a project quote, the **Quote Ref. Nbr.** box contains a number (Item 1 below). If the project status is *In Planning* or *Active*, you can add items from the estimation lines to the [Project Materials](#) (PM306500) form as follows:

1. Click **Add Quote Lines** on the table toolbar (Item 2).
2. In the dialog box, select the needed lines (Item 3).
3. Click **Add Lines & Close** (Item 4).

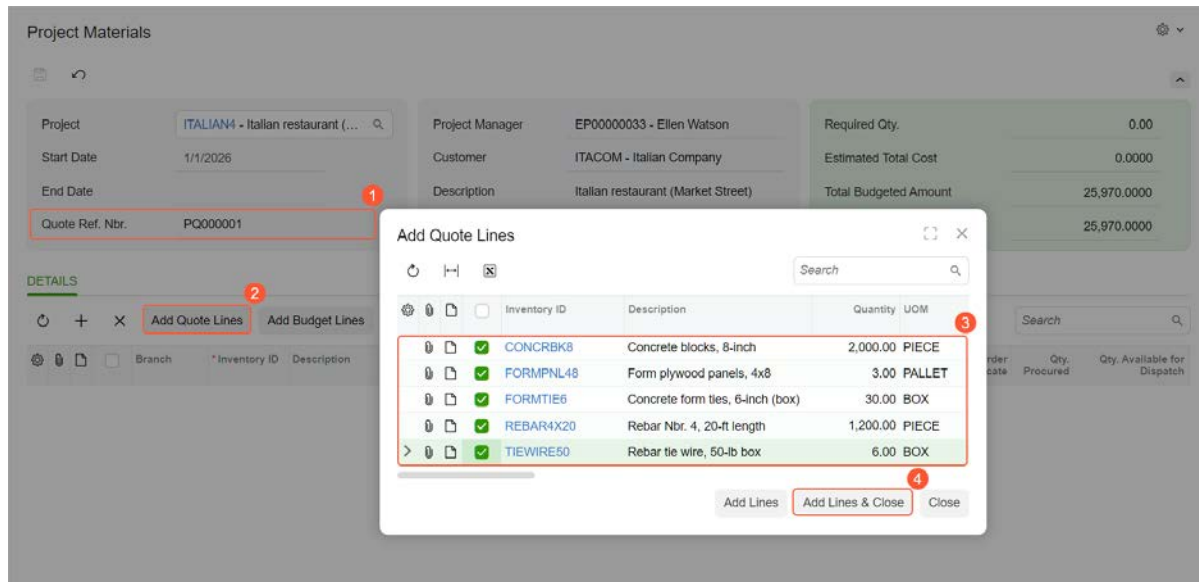


Figure: Adding quote estimation lines to the material list



The **Add Quote Lines** dialog box shows only estimation lines with an expense account group assigned.

Selecting Provisioning Sources for Project Materials

Once material lines have been added on the [Project Materials](#) (PM306500) form, you can specify how each item will be supplied:

- Through material allocation from the available company inventory
- By purchasing materials and delivering to your company warehouse
- By drop-shipping materials directly to the project site

You review the available item quantity in the **Qty. Available for Dispatch** column and select the needed option in the **Provisioning Source** column:

- *None* (default): You leave this option if the item quantity is available in the warehouse; you can allocate the needed quantity for the project.
- *Purchase to Order*: You need to purchase the item—that is, create a purchase order—and have the item delivered to a warehouse.
- *Project Drop-Ship*: You need to drop-ship the item directly from the vendor to the project site—that is, create a project drop-ship order.

Allocating Materials for the Project

Now that you've created the material list and specified how materials will be supplied, you need to make sure the needed materials will be available right on time.

Some project materials may already be available in one of your warehouses. To make sure that these materials are still available when they're needed, you allocate them in the warehouse. For each material line, you review the needed quantity in the **Qty. to Order or Allocate** column on the [Project Materials](#) (PM306500) form.

To allocate an item:

1. Click the needed line.

2. Click **Line Details** on the table toolbar (Item 1 below).
3. In the dialog box, select the needed item and specify its quantity (Items 2 and 3).
4. Click **OK** (Item 4).

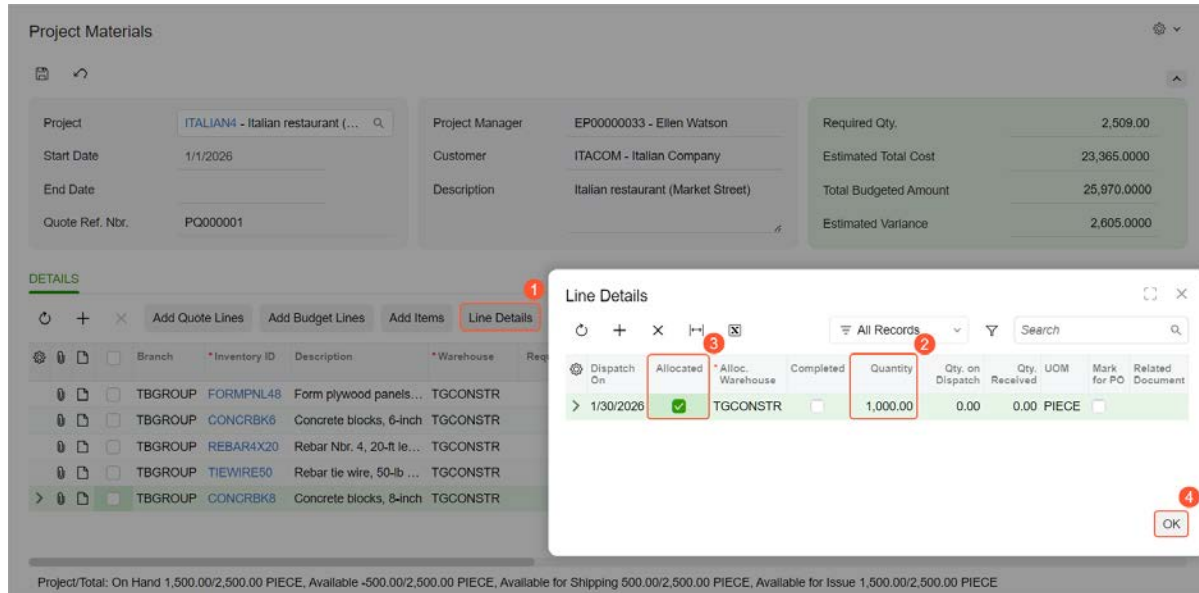


Figure: Allocating an inventory item for the project

Viewing Item Availability for a Material Line

If you click a material line on the [Project Materials](#) (PM306500) form, the table footer displays the availability of the inventory item for the specified warehouse. For each availability bucket in the table footer, the system shows either a single value with the available quantity of items or two values separated by a slash:

- The available quantity of items in the selected warehouse location related to this particular project and project task.
- The total quantity of free stock items and project stock items stored in this warehouse location.

Two values are shown if both of the following are true:

- The *Project-Specific Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.
- The line's warehouse location is linked to the project with the *Track by Project Quantity* or *Track by Project Quantity and Cost* inventory tracking mode (see [Project Inventory Tracking: Item Availability Tracking](#) for details).

Project Materials

Project: HOTEL - The Beach Hotel and Condomin...
 Start Date: 3/1/2026
 End Date:
 Quote Ref. Nbr.:

Project Manager: EP00000033 - Ellen Watson
 Customer: EQUGRP - The Equity Group Investors
 Description: The Beach Hotel and Condominiums (Warner Street)

Required Qty: 1,641.00
 Estimated Total Cost: 5,064,000.00
 Total Budgeted Amount: 2,134,625.0000
 Estimated Variance: 2,129,561.0000

DETAILS

Branch	Inventory ID	Description	Warehouse	Required Qty	UOM	Unit Cost	Ext. Cost	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate	Qty. Procured	Qty. Available for Dispatch	Qty. on Dispatch	Qty. Used	Status	Provisioning Doc. Ref. Nbr.	
	TBGROUP	CONCRBK6	Concrete blocks, 6...	TGCONSTR	1,000.00	PIECE	1,750.00	1,750.0000	0.00	0.00	1,000.00	0.00	0.00	0.00	0.00	Pending Procurement	
	TBGROUP	FORMTIE6	Concrete form ties...	TGCONSTR	40.00	BOX	1,350.00	\$4,000.00	40.00	40.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal, 000056
	TBGROUP	CONCRBK6	Concrete blocks, 6...	TGCONSTR	400.00	PIECE	1,650.00	660.0000	400.00	400.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal, 000056
	TBGROUP	ANCHBS12	Anchor bolts, 5/8"	TGCONSTR	200.00	PIECE	4,500.00	900.0000	200.00	200.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal, 000056
	TBGROUP	FORMPNL48	Form plywood pan...	TGCONSTR	1.00	PALLET	1,700.0000	1,700.0000	0.00	0.00	1.00	0.00	0.00	0.00	0.00	Pending Procurement	

Project Total: On Hand 0.00/1,000.00 PIECE, Available 0.00/2,000.00 PIECE, Available for Shipping 0.00/1,000.00 PIECE, Available for Issue 0.00/1,000.00 PIECE

Figure: Viewing item availability on the Project Materials form

Creating Purchase Orders for Project Materials

When the required item quantity isn't fully available or allocated in a warehouse, *Pending Procurement* is shown in the **Status** column for the material line on the *Project Materials* (PM306500) form. To initiate purchasing, you click **Create Purchase Order** on the table toolbar. The system initiates purchase order creation as follows, depending on the option in the **Provisioning Source** column:

- For the *Project Drop-Ship* provisioning source, it creates a purchase order of the *Project Drop-Ship* type on the *Purchase Orders* (PO301000) form, meaning that the material will be delivered directly from the vendor to the project site. This purchase order includes all material lines with the same vendor.
- For the *Purchase to Order* provisioning source, it opens the *Create Purchase Orders* (PO505000) form, and you can create purchase orders of the *Normal* type. Each purchase order will include all material lines with the same vendor.

When a purchase order for a material line is created, the system updates these columns in the line on the *Project Materials* form (see below):

- **Qty. on Orders:** The quantity in the corresponding purchase order line
- **Qty. Awaiting Delivery:** The quantity in the corresponding purchase order line to be received in the warehouse
- **Status:** *Awaiting Delivery*
- **Provisioning Doc. Ref. Nbr.:** The purchase order type and reference number

*Inventory ID	Description	*Warehouse	Required Qty.	*UOM	Unit Cost	Ext. Cost	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate	Qty. Procured	Qty. Available for Dispatch	Qty. on Dispatch	Qty. Dispatched	Qty. Used	Status	Provisioning Doc. Ref. Nbr.
FORMPNL48	Form plywood panels, 4x8	TGCONSTR	3.00	PALLET	1,650.0000	4,950.0000	0.00	0.00	3.00	0.00	3.00	0.00	0.00	0.00	Pending Procurement	
CONCRBK6	Concrete blocks, 6-inch	TGCONSTR	300.00	PIECE	1,650.00	495.0000	0.00	0.00	300.00	0.00	300.00	0.00	0.00	0.00	Pending Procurement	
REBAR4X20	Rebar Nbr. 4, 20-ft length	TGCONSTR	1,200.00	PIECE	13.0000	15,600.0000	1,200.00	1,200.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal 000054
TIEWIRE50	Rebar tie wire, 50-lb box	TGCONSTR	6.00	BOX	95.0000	570.0000	6.00	6.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal 000054
CONCRBK8	Concrete blocks, 8-inch	TGCONSTR	1,000.00	PIECE	1,750.00	1,750.0000	1,000.00	1,000.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal 000054
FORMTIE6	Concrete form ties, 6-inch...	TGCONSTR	30.00	BOX	45.0000	1,350.0000	30.00	30.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal 000055

Figure: The material lines added to a purchase order

Tracking the Receipt of Materials in a Warehouse

Suppose that the project materials have been purchased and then received in a warehouse. To record the receipt of the materials in the system, you've entered and then released a purchase receipt for the purchase order. This updates the following columns on the *Project Materials* (PM306500) form for the material lines:

- **Qty. Procured:** The purchased quantity
- **Qty. Available for Dispatch:** The quantity available in the warehouse
- **Status:** *Ready for Dispatch*

*Inventory ID	Description	*Warehouse	Required Qty.	*UOM	Unit Cost	Ext. Cost	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate	Qty. Procured	Qty. Available for Dispatch	Qty. on Dispatch	Qty. Dispatched	Qty. Used	Status	Provisioning Doc. Ref. Nbr.
FORMPNL48	Form plywood panels, 4x8	TGCONSTR	3.00	PALLET	1,650.0000	4,950.0000	0.00	0.00	3.00	0.00	3.00	0.00	0.00	0.00	Pending Procurement	
CONCRBK6	Concrete blocks, 6-inch	TGCONSTR	300.00	PIECE	1,650.00	495.0000	0.00	0.00	300.00	0.00	300.00	0.00	0.00	0.00	Pending Procurement	
REBAR4X20	Rebar Nbr. 4, 20-ft length	TGCONSTR	1,200.00	PIECE	13.0000	15,600.0000	1,200.00	0.00	0.00	1,200.00	1,200.00	0.00	0.00	0.00	Ready For Dispatch	
TIEWIRE50	Rebar tie wire, 50-lb box	TGCONSTR	6.00	BOX	95.0000	570.0000	6.00	0.00	0.00	6.00	6.00	0.00	0.00	0.00	Ready For Dispatch	
CONCRBK8	Concrete blocks, 8-inch	TGCONSTR	1,000.00	PIECE	1,750.00	1,750.0000	1,000.00	0.00	0.00	1,000.00	1,000.00	0.00	0.00	0.00	Ready For Dispatch	
FORMTIE6	Concrete form ties, 6-inch...	TGCONSTR	30.00	BOX	45.0000	1,350.0000	30.00	30.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	

Figure: Materials received in the warehouse

At this point, the project materials can be shipped to the project site.

Reflecting Materials' Movement to the Project Site

When you're ready to record the movement of listed materials to the project site, you do either of the following:

- Process a project drop-ship order if you need to ship the materials directly from the vendor to the project site

- Process a material issue if you need to ship or deliver the materials from your warehouse to the project site

To create a material issue, you do the following on the [Project Materials](#) (PM306500) form:

1. Select the material lines (Item 1 below).
2. Click **Create Material Issue** (Item 2).
3. In the dialog box, check the date and the warehouse (Item 3).
4. Click **OK** (Item 4).



You can create multiple material issues for a single material line even if an existing material issue for the line hasn't yet been confirmed.

The screenshot displays the 'Project Materials' form with a 'Create Material Issue' dialog box open. The dialog box contains the following fields:

- Date *: 1/15/2026
- Warehouse ID *: TGCONSTR - ToadGreen Building Group warehouse
- OK button

The background table shows the following material lines:

	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate	Qty. Procured	Qty. Available for Dispatch	Qty. on Dispatch	Qty. Dispatched
TBGROUP CONCRBK8 Concrete blocks, 6...	0.00	0.00	3.00	0.00	3.00	0.00	0.00
TBGROUP REBAR4X20 Rebar Nbr. 4, 20-ft...	1,200.00	0.00	0.00	1,200.00	1,200.00	0.00	0.00
TBGROUP TIEWIRE60 Rebar tie wire, 50...	6.00	0.00	0.00	6.00	6.00	0.00	0.00
TBGROUP CONCRBK8 Concrete blocks, 8...	1,000.00	0.00	0.00	1,000.00	1,000.00	0.00	0.00
TBGROUP FORMTIE6 Concrete form ties...	30.00	30.00	0.00	0.00	0.00	0.00	0.00

Project/Total: On Hand 1,000.00/1,000.00 PIECE, Available 0.00/2,000.00 PIECE, Available for Shipping 1,000.00/2,000.00 PIECE, Available for Issue 1,000.00/1,000.00 PIECE

Figure: Creating the material issue

The system opens the material issue on the [Shipments](#) (SO302000) form. If you need to provide a pick list of the project materials to warehouse personnel, click **Print Pick List** on the More menu.

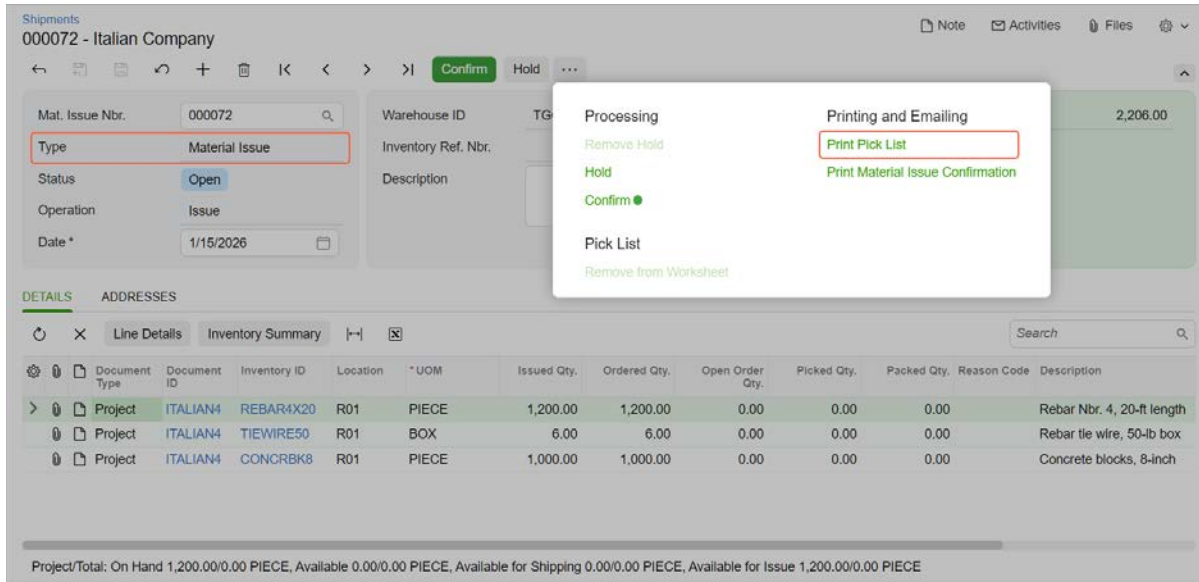


Figure: The material issue

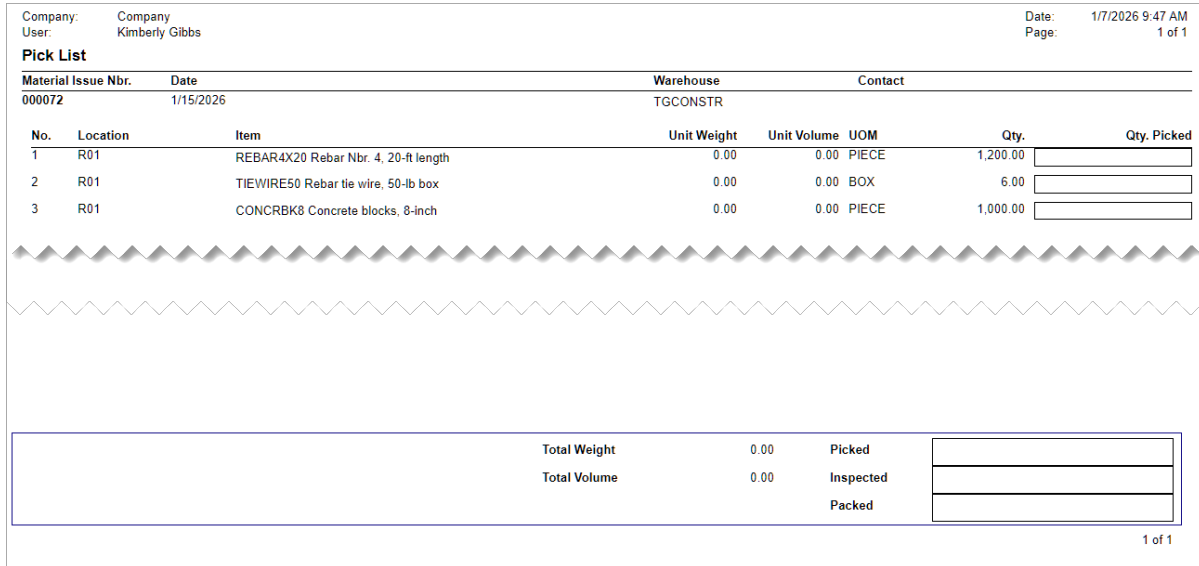


Figure: The pick list

Once the material issue has been created for the material lines, the **Qty. on Dispatch** column is updated on the [Project Materials](#) form. And when you confirm the material issue for the material lines, the following columns are updated, as shown below:

- **Qty. Dispatched:** The quantity issued from the warehouse to the project site
- **Status:** *Completed*

Project Materials

Project: ITALIANI - Italian restaurant (Market St...
 Start Date: 1/1/2025
 End Date:
 Quote Ref. Nbr.: PQ000001

Project Manager: EP0000033 - Ellen Watson
 Customer: ITACOM - Italian Company
 Description: Italian restaurant (Market Street)


Required Qty.: 2,539.00
 Estimated Total Cost: 24,715.0000
 Total Budgeted Amount: 25,970.0000
 Estimated Variance: 1,255.0000

DETAILS

*Inventory ID	Description	*Warehouse	Required Qty.	*UOM	Unit Cost	Ext. Cost	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate	Qty. Procured	Qty. Available for Dispatch	Qty. on Dispatch	Qty. Dispatched	Qty. Used	Status	Provisioning Doc. Ref. Nbr.
FORMPNL48	Form plywood panels, 4x8	TGCONSTR	3.00	PALLET	1,650.0000	4,950.0000	0.00	0.00	3.00	0.00	3.00	0.00	0.00	0.00	Pending Procurement	
CONCRBK6	Concrete blocks, 6-inch	TGCONSTR	300.00	PIECE	1,650.0000	495.0000	0.00	0.00	300.00	0.00	300.00	0.00	0.00	0.00	Pending Procurement	
REBAR4X20	Rebar Nbr. 4, 20-ft length	TGCONSTR	1,200.00	PIECE	13.0000	15,600.0000	1,200.00	1,200.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal. 000054
TIEWIRE50	Rebar tie wire, 50-lb box	TGCONSTR	6.00	BOX	95.0000	570.0000	6.00	6.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal. 000054
CONCRBK8	Concrete blocks, 8-inch	TGCONSTR	1,000.00	PIECE	1.7500	1,750.0000	1,000.00	1,000.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal. 000054
FORMTIE6	Concrete form ties, 6-inch	TGCONSTR	30.00	BOX	45.0000	1,350.0000	30.00	30.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	Normal. 000055


Project/Total: On Hand 0.00/0.00 PIECE, Available 0.00/0.00 PIECE, Available for Shipping 0.00/0.00 PIECE, Available for Issue 0.00/0.00 PIECE

Figure: Materials issued from the warehouse to the project site

 In the **Qty. Used** column, you can enter actual quantity of materials used for the project.

Operations with Individual Material Lines

While you're working on the [Project Materials](#) (PM306500) form, you can manage any material line by changing its status. To do this, select the needed lines, click **Change Line Status** on the table toolbar and then click the needed command.

 If your screen resolution doesn't allow all the commands to be displayed on the table toolbar, this menu is shown as the More menu (...), and it may include other commands in addition to the ones for changing the status.

Project Materials

Project: ITALIANI - Italian restaurant (Market ...
 Start Date: 1/1/2025
 End Date:
 Quote Ref. Nbr.: PQ000001

Project Manager: EP0000033 - Ellen Watson
 Customer: ITACOM - Italian Company
 Description: Italian restaurant (Market Street)

Required Qty.: 2,539.00
 Estimated Total Cost: 24,715.0000
 Total Budgeted Amount: 25,970.0000
 Estimated Variance: 1,255.0000

DETAILS

*Inventory ID	Description	*Warehouse	Required Qty.	*UOM	Unit Cost	Ext. Cost	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate	Qty. Procured	Qty. Available for Dispatch	Qty. on Dispatch	Qty. Dispatched	Qty. Used	Status	Provisioning Doc. Ref. Nbr.
FORMPNL48	Form plywood panels, 4x8	TGCONSTR	3.00	PALLET	1,650.0000	4,950.0000	0.00	0.00	3.00	0.00	3.00	0.00	0.00	0.00	Pending Procurement	
CONCRBK6	Concrete blocks, 6-inch	TGCONSTR	300.00	PIECE	1,650.0000	495.0000	0.00	0.00	300.00	0.00	300.00	0.00	0.00	0.00	Pending Procurement	
REBAR4X20	Rebar Nbr. 4, 20-ft length	TGCONSTR	1,200.00	PIECE	13.0000	15,600.0000	1,200.00	1,200.00	0.00	0.00	0.00	0.00	1,200.00	0.00	Ready For Dispatch	
TIEWIRE50	Rebar tie wire, 50-lb box	TGCONSTR	6.00	BOX	95.0000	570.0000	6.00	0.00	0.00	6.00	0.00	0.00	0.00	0.00	Ready For Dispatch	
CONCRBK8	Concrete blocks, 8-inch	TGCONSTR	1,000.00	PIECE	1.7500	1,750.0000	1,000.00	0.00	0.00	1,000.00	0.00	1,000.00	0.00	0.00	Ready For Dispatch	
FORMTIE6	Concrete form ties, 6-inch...	TGCONSTR	30.00	BOX	45.0000	1,350.0000	30.00	30.00	0.00	0.00	0.00	0.00	0.00	0.00	Awaiting Delivery	

Project/Total: On Hand 3.00/0.00 PALLET, Available 3.00/3.00 PALLET, Available for Shipping 3.00/0.00 PALLET, Available for Issue 3.00/0.00 PALLET

Figure: Commands for changing the status of the material line

You can click any of these commands to change the status of the selected line:

- **Hold Line:** Changes the line's status to *On Hold* to temporarily forbid the creation of a purchase order or material issue for the line. This command is available only if the line has no open material issues.
- **Remove Line from Hold:** Changes the line status from *On Hold* to its previous status in the workflow: *Pending Procurement* or *Awaiting Delivery*.
- **Complete Line:** Changes the line status to *Completed*, which means that the materials have been received and used. The line becomes read-only, and no further purchasing or issuing is allowed. You can reopen the line, if needed.
- **Cancel Line:** Changes the line status to *Canceled*, which means that the material in the line is no longer needed for the project. The line becomes read-only, and no further purchasing or issuing is allowed. You can reopen the line, if needed.
- **Reopen Line:** Changes the line status from *Completed* or *Canceled* to its previous status in the workflow: *Pending Procurement* or *Awaiting Delivery*.

Consolidated View of Inventory Documents for Materials

By using the **Linked Documents** side panel tab on the *Project Materials* (PM306500) form, you can view all material issues, purchase receipts, and inventory issues related to the project's material lines.

The screenshot shows the 'Project Materials' form with the 'Linked Documents' side panel open. The main form displays project details for 'ITALIAN4 - Italian restaurant' and a list of material lines. The side panel shows a table of linked documents for a selected line.

Line Nbr.	Inventory ID	Document Type	Reference Nbr.	Status	Document Date	Inventory Doc. Type	Inventory Ref. Nbr.	Qty.	UOM	Warehouse	Location
3	REBAR4X20	Purchase Receipt	000046	Released	1/15/2026	Receipt	000111	1,200.00	PIECE	TGCON...	R01
4	TIEWIRE50	Purchase Receipt	000046	Released	1/15/2026	Receipt	000111	6.00	BOX	TGCON...	R01
5	CONCRBK8	Purchase Receipt	000046	Released	1/15/2026	Receipt	000111	1,000.00	PIECE	TGCON...	R01
5	TIEWIRE50	Material Issue	000072	Completed	1/15/2026	Issue	000068	2,206.00	PIECE	TGCON...	R01

Figure: The Linked Documents side panel

To view these documents for a particular material line:

1. You add the **Line Nbr.** column to the visible columns of the *Project Materials* form to view the number of a particular line.
2. You select this line number in the **Project Material Line Nbr.** box of the side panel tab.

Viewing Material Lines Related to Purchase Order Lines

In Acumatica ERP 2026 R1, you can also view information about the material line related to a purchase order line. To do this, you use the **Demand** dialog box of the *Purchase Orders* (PO301000) form, shown below. You open it by clicking a line and then clicking **View Demand** on the table toolbar of the **Details** tab.

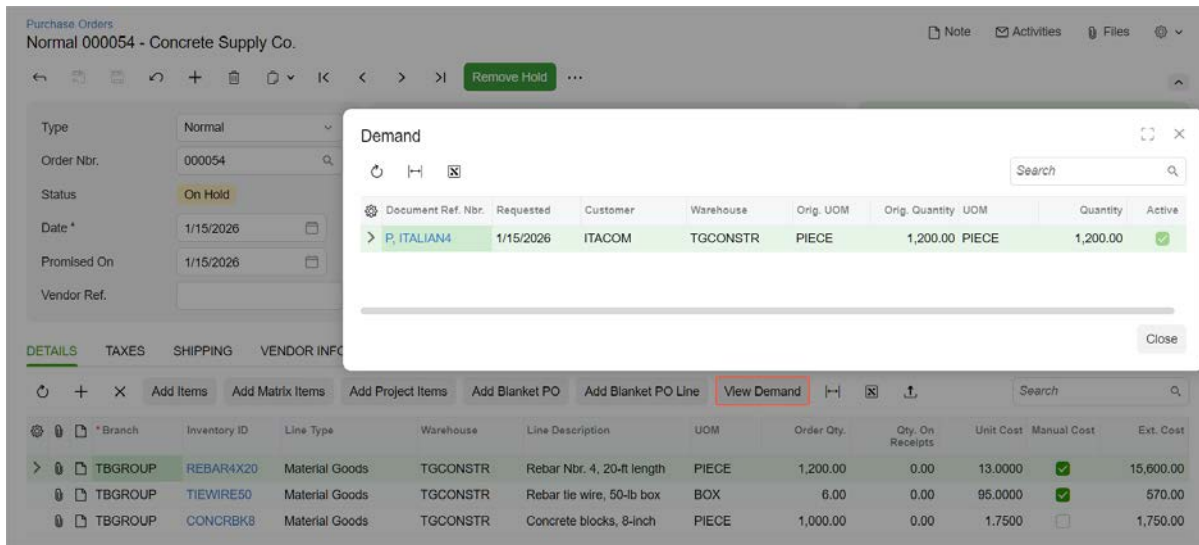


Figure: Viewing information about the material line

If you want to view the project's entire material list from the dialog box, you click the link in the **Document Ref. Nbr.** column. This opens the [Project Materials](#) (PM306500) form with the project selected.

Linking a Purchase Order to a Material Line

A purchase order or project drop-ship order may be created before a corresponding material line is added to the [Project Materials](#) (PM306500) form. In this case, once you've added the material line, you can link it to the purchase order line as follows:

1. Click the needed line (Item 1 below).
2. Click **PO Link** on the table toolbar (Item 2).
3. In the **Purchasing Settings** dialog box, select the corresponding purchase order line (Item 3).
4. Click **Save** (Item 4).

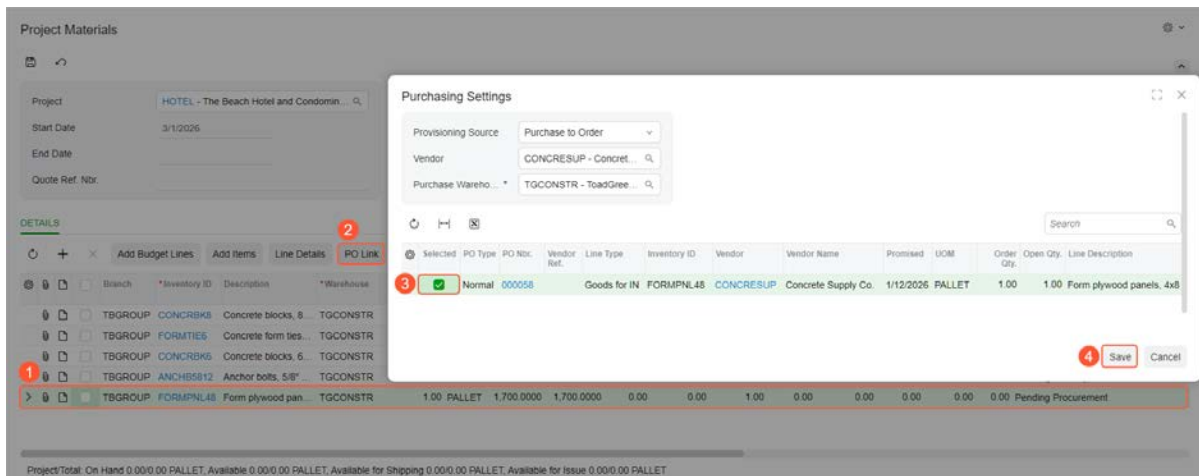


Figure: Linking a material line to a purchase order

Inventory Source for Project Materials

If you've enabled the *Project-Specific Inventory* feature and are using this functionality in your system, you can view the inventory source of a material line on the [Project Materials](#) (PM306500) form. You can change this inventory source if the selected project has the following settings on the [Projects](#) (PM301000) form:

- **Inventory Tracking:** *Track by Project Quantity* or *Track by Project Quantity and Cost*
- **Allow Issue from Free Stock:** Selected

Project Materials

Project: ITALIAN4 - Italian restauran...
 Start Date: 1/1/2026
 End Date:
 Quote Ref. Nbr.: PO000001

Project Manager: EP00000033 - Ellen Watson
 Customer: ITACOM - Italian Company
 Description: Italian restaurant (Market Street)


Required Qty.: 2,509.00
 Estimated Total Cost: 23,365.0000
 Total Budgeted Amount: 25,970.0000
 Estimated Variance: 2,605.0000

DETAILS

Branch	Inventory ID	Description	Warehouse	Inventory Source	Required Qty.	UOM	Unit Cost	Ext. Cost	Qty. on Orders	Qty. Awaiting Delivery	Qty. to Order or Allocate
TBGROUP	FORMPNL48	Form plywood panels...	TGCONSTR	Project Stock	3.00	PALLET	1,650.0000	4,950.0000	0.00	0.00	3.00
TBGROUP	CONCRBK6	Concrete blocks, 6-inch	TGCONSTR	Free Stock	300.00	PIECE	1.6500	495.0000	0.00	0.00	300.00
TBGROUP	REBAR4X20	Rebar Nbr. 4, 20-ft le...	TGCONSTR	Project Stock	1,200.00	PIECE	13.0000	15,600.0000	0.00	0.00	1,200.00
TBGROUP	TIEWIRE50	Rebar tie wire, 50-lb ...	TGCONSTR	Project Stock	6.00	BOX	95.0000	570.0000	0.00	0.00	6.00
TBGROUP	CONCRBK8	Concrete blocks, 8-inch	TGCONSTR	Free Stock	1,000.00	PIECE	1.7500	1,750.0000	0.00	0.00	1,000.00

Project/Total: On Hand 0.00/0.00 PIECE, Available 0.00/1,200.00 PIECE, Available for Shipping 0.00/0.00 PIECE, Available for Issue 0.00/0.00 PIECE


Figure: The Inventory Source column

 You can also view the inventory source in the lines of a related material issue on the [Shipments](#) (SO302000) form. The **Inventory Source** column is hidden by default, but you can add it to the visible columns.

Mass-Processing and Automated Warehouse Operations for a Material Issue

You can process a material issue similarly to a shipment on the following forms:

- [Process Shipments](#) (SO503000)
- [Pick, Pack, and Ship](#) (SO302020)
- [Picking Worksheets](#) (SO302500)
- [Create Pick Lists](#) (SO503050)

 On the [Create Pick Lists](#) form, you can include a material issue only in a pick list of the *Single-Shipment* or *Wave* type.

Availability Calculation Rules with New Item Plans

You can refer to the following table for the rules on the [Availability Calculation Rules](#) (IN201500) form with new item plans:

Check Box	Description
Deduct Qty. on Material Lines Prepared	Indicates whether the available item quantity is decreased when some item quantity is added to a document with the new <i>Material Prepared</i> item plan
Deduct Qty. on Material Lines	Indicates whether the available item quantity is decreased when some item quantity is added to a document with the new <i>Material Booked</i> item plan
Deduct Qty. Allocated for Material Lines	Indicates whether the available item quantity is decreased when some item quantity is added to a document with the new <i>Material Allocated</i> item plan
Deduct Qty. Dispatched	Indicates whether the available item quantity is decreased when some item quantity is added to a document with the new <i>Material Dispatched</i> item plan
Include Qty. of Material Purchase and Material to Purchase	Indicates whether the available item quantity is increased or decreased when some item quantity is added to a document with the new <i>Material to Purchase</i> , <i>Material Purchase</i> , <i>Material Purchase Prepared</i> , or <i>Material Receipts</i> item plan

Learn More

For additional insights on project material management, purchases, and inventory, you may want to check out these resources:

- [Configuration of Project Material Management: General Information](#)
- [Project Material Management: General Information](#)
- [Purchases to the Project Site with a Receipt: General Information](#)
- [Project Inventory Tracking: General Information](#)

Projects and Construction: Project-Related User-Defined Fields

Acumatica ERP 2026 R1 intelligently supports user-defined fields across project templates, projects, project quotes, and tasks. When you create records based on other records, the values of shared user-defined fields are automatically carried over as default values, helping you maintain **data consistency**. The system can copy values across these records **only if** you've added the user-defined fields to each of the applicable forms.



To perform system-wide configuration of data entry forms, including adding user-defined fields, your user account must have the *Administrator* and *Customizer* roles.

User-Defined Fields in Project Templates and Template Tasks

You can now add user-defined fields and specify their values in a project template on the [Project Templates](#) (PM208000) form. Below you can see user-defined fields that have been added to this form, along with the values specified for the *PROGRQ* project template.

The screenshot displays the 'Project Templates' form for the 'PROGRQ' template. The form is divided into several sections: 'Project Properties', 'Retainage', and 'Summary'. The 'Project Properties' section includes fields for 'Revenue Budget Level', 'Cost Budget Level', 'Project Group', 'Construction Type', 'Time Activity Approver', and 'Inventory Tracking'. The 'Retainage' section includes 'Retainage Mode', 'Include CO', 'Fixed Retainage', and 'Retainage with Steps'. The 'Summary' section includes 'Permit Status', 'Project Manager', and 'Project Manager Assistant'. A red box highlights the 'Construction Type' field, which is set to 'Hospitality Construction'. Other fields are also highlighted with red boxes, including 'Permit Status' (Pending Submission), 'Project Manager' (EP00000033 - Ellen Watson), and 'Project Manager Assistant'.

Figure: User-defined fields of a project template and their values

When you create a project on the [Projects](#) (PM301000) form and select this template, the system copies the template's values of shared user-defined fields to the project.

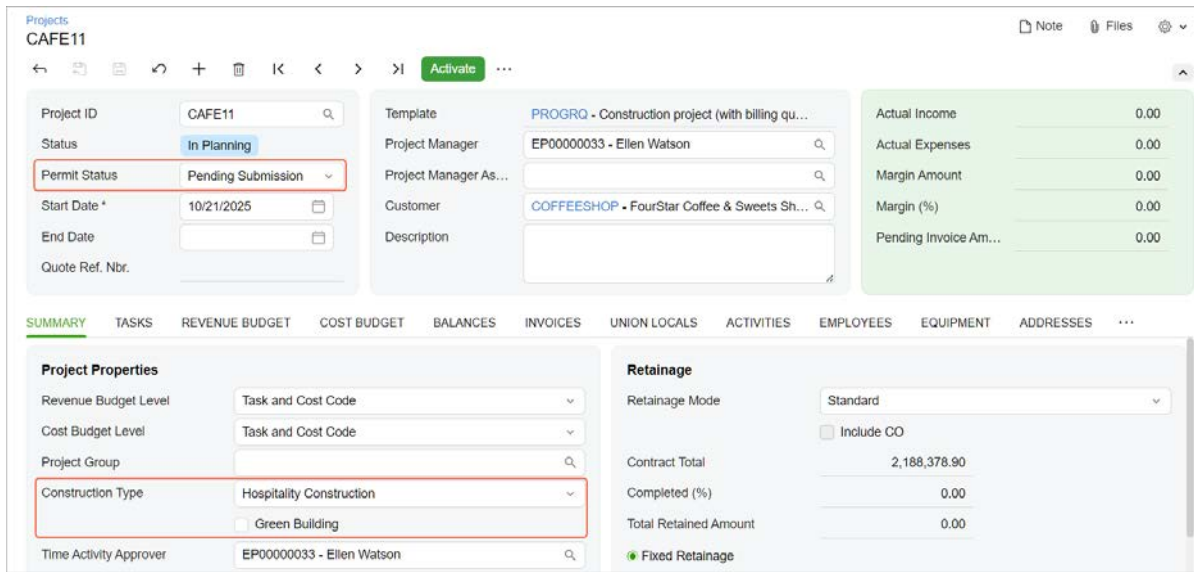


Figure: Values of user-defined fields copied from the project template

Similarly, you can add user-defined fields to the *Project Template Tasks* (PM208010) and *Project Tasks* (PM302000) forms and specify their values in a template task. If a project template includes this template task, the system copies the values of its user-defined fields to each project task created from the task template.

User-Defined Fields in Project Quotes

Consider this scenario:

- You’ve defined the same user-defined fields on these forms: *Project Templates* (PM208000), *Projects* (PM301000), and *Project Quotes* (PM304500).
- The *PROGRQ* project template has values specified for these user-defined fields.

Now you’re selecting the *PROGRQ* template in a new or existing project quote on the *Project Quotes* form. The system copies the project template’s user-defined field values to the project quote in either of these cases:

- The **Estimation** tab has no lines added.
- The **Estimation** tab has lines, and you click **Yes** in the **Apply Template to Quote** dialog box (see below).

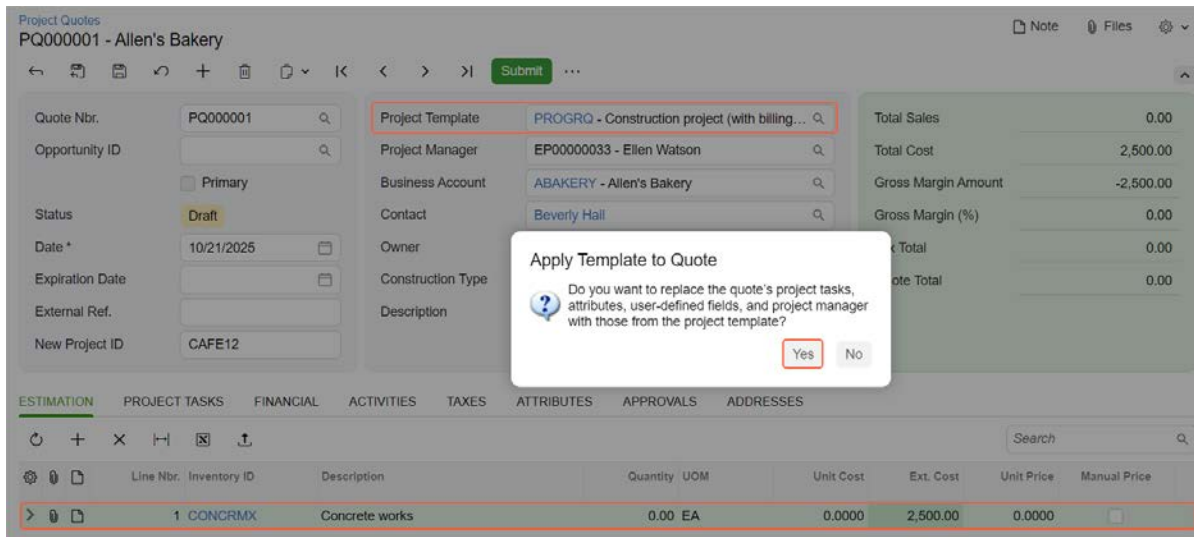


Figure: Selecting a project template in a quote with estimated costs

If you then convert the project quote to a project, you can copy the user-defined field values to this project:

1. While viewing the project quote on the [Project Quotes](#) form, click **Convert to Project** on the form toolbar.
2. In the **Convert to Project** dialog box, select the new **Populate User-Defined Fields** check box (see below).
3. Click **OK**. The system creates a project based on the quote, opens it on the [Projects](#) form, and populates the project's user-defined fields with the quote's values.

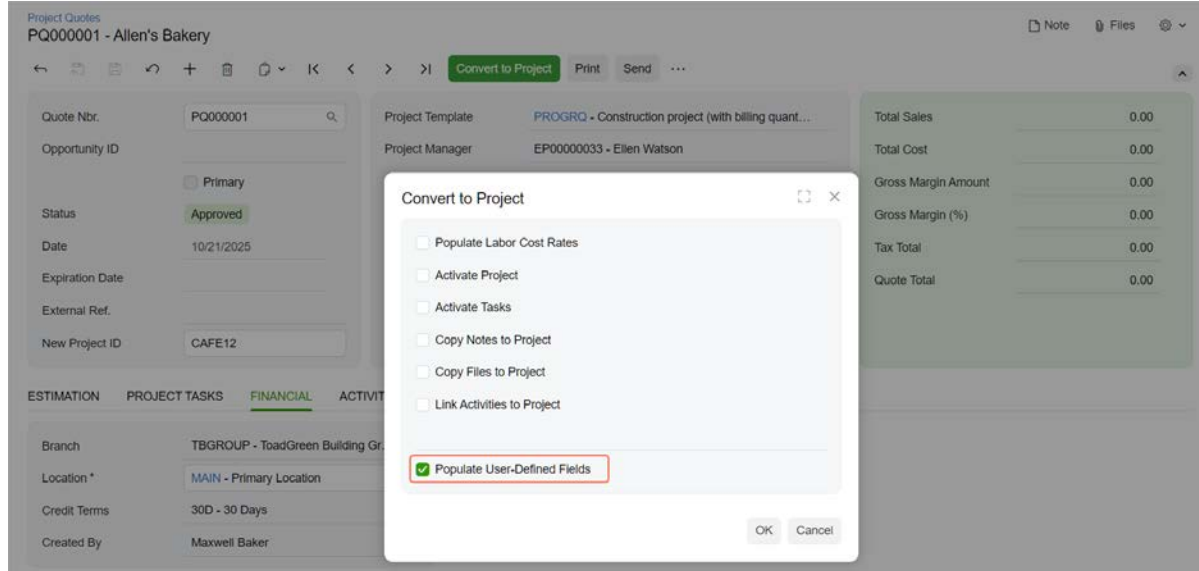


Figure: The new check box

Copying of User-Defined Field Values from a Project

When you're working with an existing project on the [Projects](#) (PM301000) form, the system copies its default user-defined field values to these newly created records related to the project:

- A project template when you click **Create Template**
- A project when you click **Copy Project**
- A common task when you click **Add Common Tasks** on the **Tasks** tab

Learn More

Need more details on user-defined fields? See [Adjustment of the Acumatica ERP UI: Managing User-Defined Fields](#).

Projects and Construction: Streamlined Change Order Processing

Project teams often need to keep work moving while they're waiting for the project owner to approve a submitted project change. In Acumatica ERP 2026 R1, streamlined change order processing lets you continue work without delays by **releasing cost changes independently of revenue changes**.

Also, you can **track the project owner's approval of a change order** directly in the system. And after reversing an incorrect change order, you can **reuse its change requests** by adding them to another change order.

This functionality helps you maintain project momentum while accurately reflecting a change's approval status and financial impact.



The new functionality depends on the features enabled on the [Enable/Disable Features](#) (CS100000) form:

- *Change Orders* for working with change orders
- *Change Orders and Change Requests* for working with change requests

Tracking the Approval Process with Owner-Related Statuses

As part of a real-world approval cycle, you can track the project owner's approval process for change orders.

When a change order is ready for the project owner's review, you remove it from hold on the [Change Orders](#) (PM308000) form and click the new **Send to Owner** command on the More menu (Item 1 below). The system:

1. Creates an email on the [Email Activity](#) (CR306015) form.
2. Attaches the [Change Order](#) (PM643000) report to the email.
3. Sends the email to the project owner (the customer contact) based on the mailing settings defined for the change order's project.
4. Changes the status of the change order to *Sent to Owner*.

When you've received the owner's response about the change order, you can change its status by clicking one of these new commands on the More menu:

- **Mark as Accepted** (Item 2): Changes the status to *Accepted by Owner*
- **Mark as Declined** (Item 3): Changes the status to *Declined by Owner*

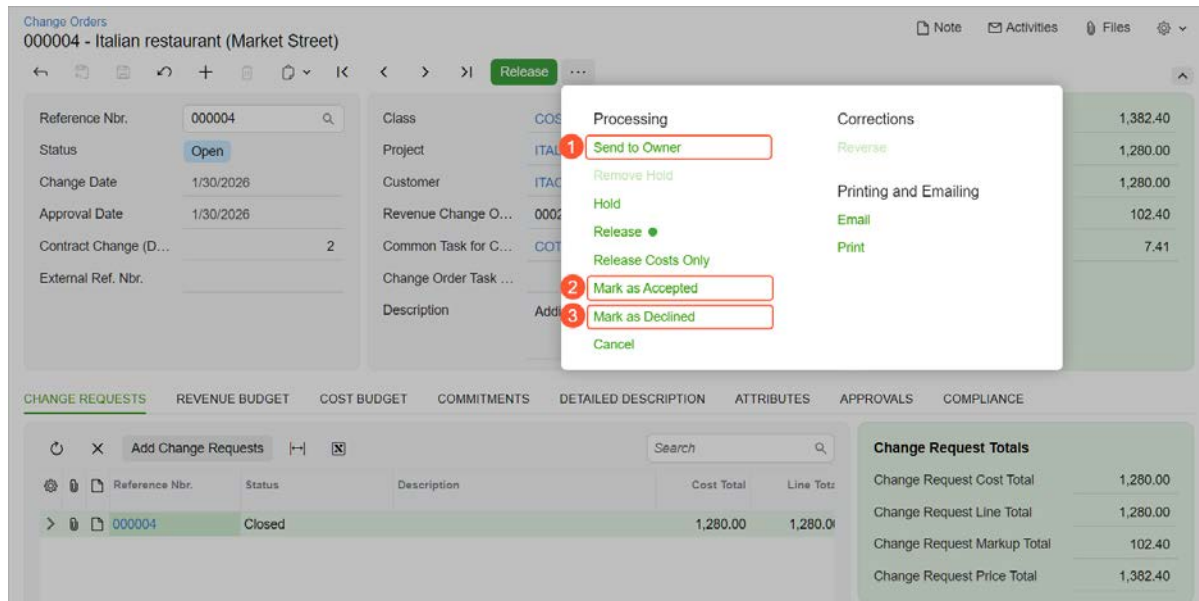


Figure: The commands supporting the project owner's approval process

When a change order has the *Accepted by Owner* or *Declined by Owner* status, you can change the settings on the **Revenue Budget** tab of the [Change Orders](#) form. All other settings are unavailable for editing.

Releasing Cost Changes Before the Owner's Approval

In some cases, you may want to release the cost part of the change order before the project owner formally approves the revenue part of the change order so that project work can stay on schedule.

To do this, you click the new **Release Costs Only** command on the More menu of the [Change Orders](#) (PM308000) form. For the change order's cost budget lines, the system:

- Moves amounts and quantities from the **Potential CO Amount** and **Potential CO Quantity** columns to the **Budgeted CO Amount** and **Budgeted CO Quantity** columns for the affected project budget lines on the [Projects](#) (PM301000) form
- If commitment lines have been specified on the **Commitments** tab, does one of these:
 - Adds to a new document a line associated with the project and project task
 - Updates an existing commitment line associated with the project and project task
- Changes the status of the change order to *Cost Budget Released*

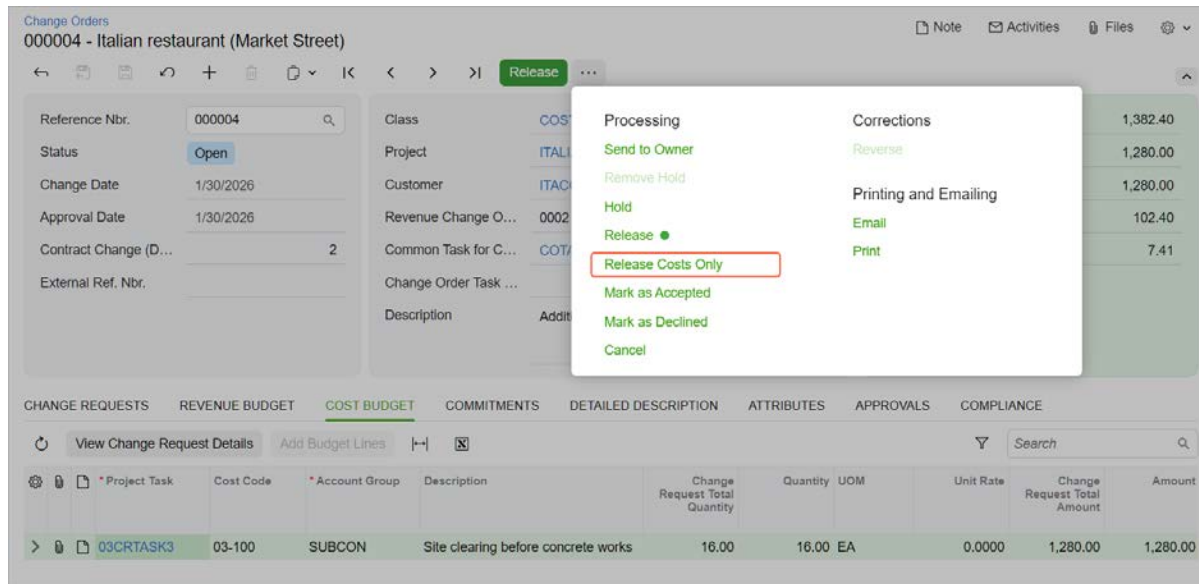


Figure: The Release Costs Only command

When the cost part of the change order has been released, you can proceed with the release of the revenue part.



After the change order's costs have been released, you can't put the change order on hold or cancel it.

When a change order has the *Cost Budget Released* status, you can edit the settings on the **Revenue Budget** tab of the [Change Orders](#) form. Other settings are unavailable for editing.

Unlinking Change Requests from a Reversed Change Order

If a change order was created in error or contains mistakes, you can reverse it and continue working with its change requests.

When you click **Reverse** on the More menu of the [Change Orders](#) (PM308000) form for the change order and release the reversing change order, the system does the following:

- **For the original (reversed) change order:**
 - Unlinks all associated change requests from the change order
 - Keeps all revenue, cost, and commitment lines in the change order, including those generated from the estimation lines of the unlinked change requests
- **For each unlinked change request** on the [Change Requests](#) (PM308500) form, shown below:
 - Changes the status to *Open*
 - Removes the link to the reversed change order
 - For estimation lines whose commitment documents have already been billed or whose purchase receipt has been released, clears the **Create Commitment** check box and shows a warning

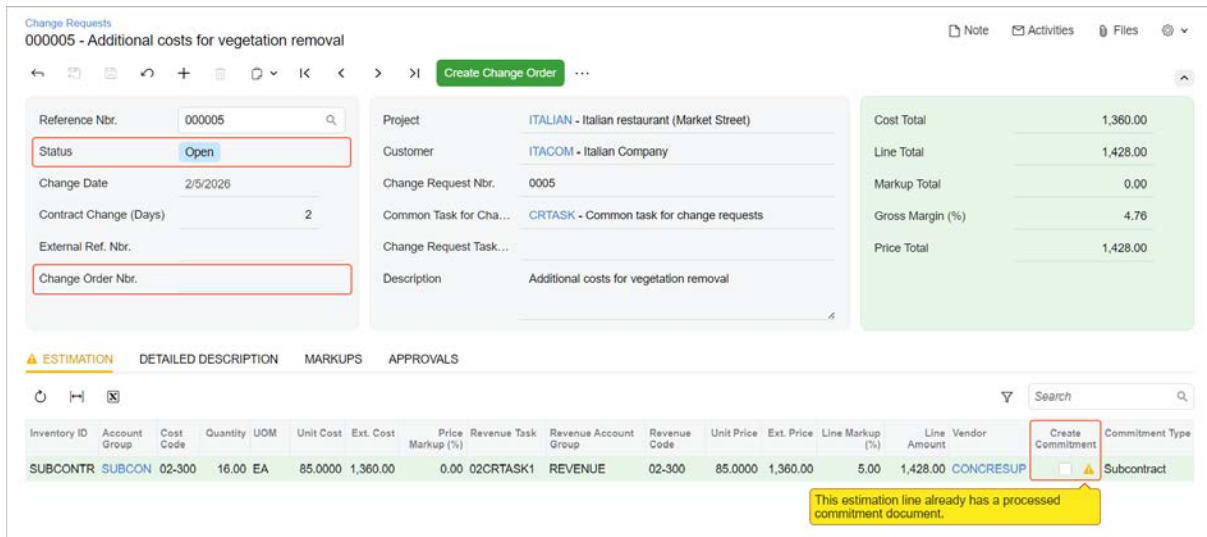


Figure: The reopened change request

You can continue editing the unlinked reopened change request or add it to a new change order.

Mobile App Enhancements

In the Acumatica mobile app, you can track project budget changes as part of your daily work on the project site. The new commands related to the owner's approval process and release of costs separately are available on the *Change Order* screen (see below).

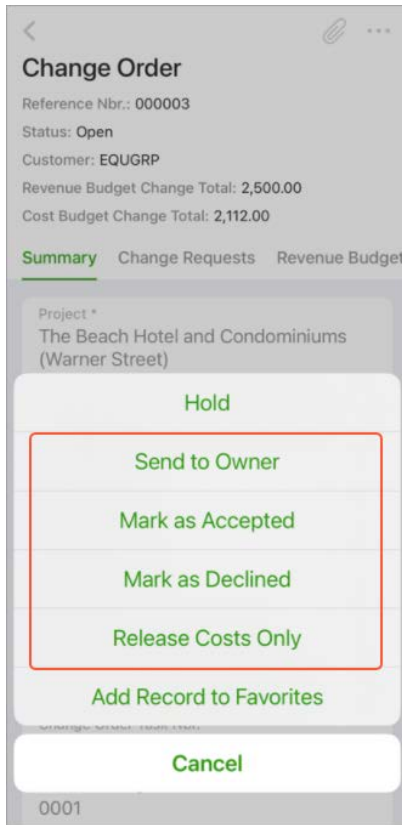


Figure: The new change order commands

Key Takeaways

- You can release cost budget and commitments before releasing revenue budget changes, allowing work to continue while approvals are pending.
- New change order commands and statuses clearly reflect communication with the project's owner and approval outcomes.
- After reversing a change order, you can open and reuse change requests without losing your previous work.

Learn More

Need more details on change orders and change requests? See:


- [Change Requests: General Information](#)
- [Single-Tier Change Management: General Information](#)

Projects and Construction: Tax Calculation in Change Orders

In construction, change orders are legally binding amendments to project agreements. To keep contractors and customers aligned and to avoid disputes, it's critical to clearly communicate both the total revenue impact and the calculated taxes.

Starting in Acumatica ERP 2026 R1, you can review the full financial impact of a change order—including taxes—before you send it to the customer. You can calculate sales tax or VAT for a change order by using the system's internal tax functionality or through an external tax provider.

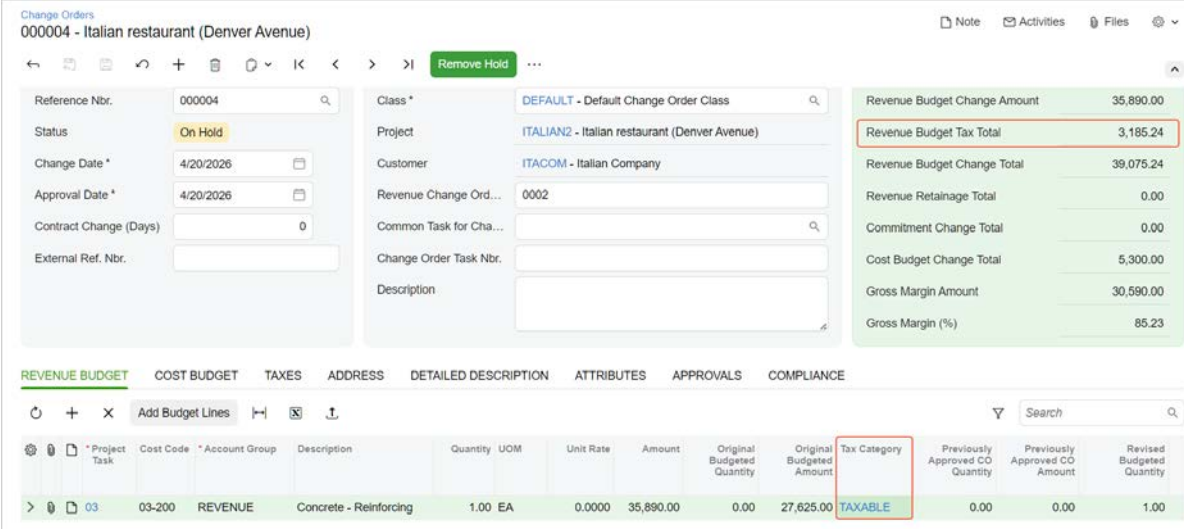
When you print or email a change order, the printable document now includes the tax amount so that customers can clearly see it as part of the change order total.



- Tax calculation applies only to revenue budget lines of change orders.
- Only taxes of the *Sales* or *VAT* type are supported for change orders.
- The new functionality depends on the features enabled on the [Enable/Disable Features](#) (CS100000) form:
 - VAT Reporting* for VAT calculation
 - External Tax Calculation Integration* for tax calculation through an external provider, such as Avalara AvaTax or Vertex

Specifying a Tax Category for Change Order Lines

When taxes have been configured, you can specify a tax category in the new **Tax Category** column on the **Revenue Budget** tab of the [Change Orders](#) (PM308000) form for each line, as shown below. Taxes are calculated for only the revenue budget lines with a tax category specified.



The screenshot shows the Acumatica ERP interface for a Change Order. The top section displays metadata for '000004 - Italian restaurant (Denver Avenue)', including status 'On Hold', change date '4/20/2026', and project details. A summary table on the right shows financial totals, with 'Revenue Budget Tax Total' highlighted in red at 3,185.24. The bottom section is the 'REVENUE BUDGET' tab, which contains a table of budget lines. The first line is highlighted in green and has its 'Tax Category' set to 'TAXABLE', also highlighted in red.

Revenue Budget Change Amount	35,890.00
Revenue Budget Tax Total	3,185.24
Revenue Budget Change Total	39,075.24
Revenue Retainage Total	0.00
Commitment Change Total	0.00
Cost Budget Change Total	5,300.00
Gross Margin Amount	30,590.00
Gross Margin (%)	85.23

Project Task	Cost Code	Account Group	Description	Quantity	UOM	Unit Rate	Amount	Original Budgeted Quantity	Original Budgeted Amount	Tax Category	Previously Approved CO Quantity	Previously Approved CO Amount	Revised Budgeted Quantity
03	03-200	REVENUE	Concrete - Reinforcing	1.00	EA	0.0000	35,890.00	0.00	27,625.00	TAXABLE	0.00	0.00	1.00

Figure: The tax category on the Revenue Budget tab

Applying Taxes to Change Orders

If sales taxes or VATs are configured, you can review calculated taxes on the new **Taxes** tab of the [Change Orders](#) (PM308000) form. In the **Tax Info** section of the tab, you specify the tax zone. In the Summary area of the form, you can view the following amounts of the change order, as shown below:

- **Revenue Budget Change Amount** (new box): The revenue amount before taxes for exclusive taxes or the revenue amount with taxes for inclusive taxes
- **Revenue Budget Tax Total** (new box): The calculated tax amount
- **Revenue Budget Change Total**: The total revenue amount, including tax

Note that the amounts in the **Gross Margin Amount** and **Gross Margin (%)** boxes of the Summary area are now calculated based on the revenue amounts before taxes. This calculation ensures more accurate profitability analysis.

The screenshot shows the 'Change Orders' form for '000004 - Italian restaurant (Denver Avenue)'. The 'TAXES' tab is selected, displaying a table of tax entries and a summary of calculated amounts.

* Tax ID	Tax Rate	Taxable Amount	Tax Amount
> NYSTATETAX	8.875000	35,890.00	3,185.24

Revenue Budget Change Amount	35,890.00
Revenue Budget Tax Total	3,185.24
Revenue Budget Change Total	39,075.24
Revenue Retainage Total	0.00
Commitment Change Total	0.00
Cost Budget Change Total	5,300.00
Gross Margin Amount	30,590.00
Gross Margin (%)	85.23

Figure: The calculated taxes



On the **Taxes** tab, you can also view and change the tax calculation mode if the *Net/Gross Entry Mode* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Taxes are automatically recalculated on the [Change Orders](#) form when you modify:

- The amounts or tax categories in change order lines on the **Revenue Budget** tab
- The tax settings on the **Taxes** tab

Calculating Retained Taxes

Suppose that your customer retains a part of the amount of invoices prepared for change orders. To reflect this, you've enabled the *Retainage Support* feature on the [Enable/Disable Features](#) (CS100000) form.

Retained amounts are calculated on the **Revenue Budget** tab of the [Change Orders](#) (PM308000) form. If you specify the retainage percent for revenue budget lines, the system calculates:

- The retained taxable amount and retained tax amount on the **Taxes** tab if the **Retain Taxes** check box is selected on the [Accounts Receivable Preferences](#) (AR101000) form
- The retained revenue change amount in the **Revenue Retainage Total** box of the Summary area

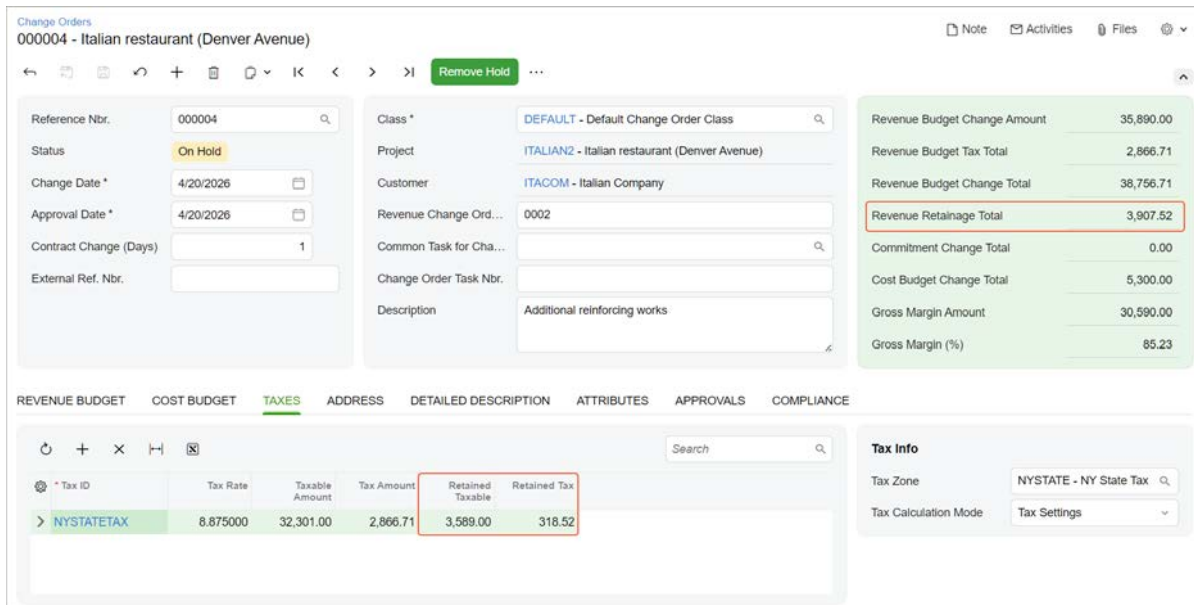



Figure: The retained amounts

 Retainage of taxes isn't supported if you use an external tax provider.

Applying Taxes Calculated by External Tax Providers

Your company may be calculating taxes by using an external tax provider, such as Avalara AvaTax or Vertex. Taxes are calculated for a change order on the [Change Orders](#) (PM308000) form when you do any of these:

- Save the change order
- Release the change order
- Click the new **Recalculate External Tax** command on the More menu (see below)

You can review the tax settings and the calculated taxes on the **Taxes** tab.

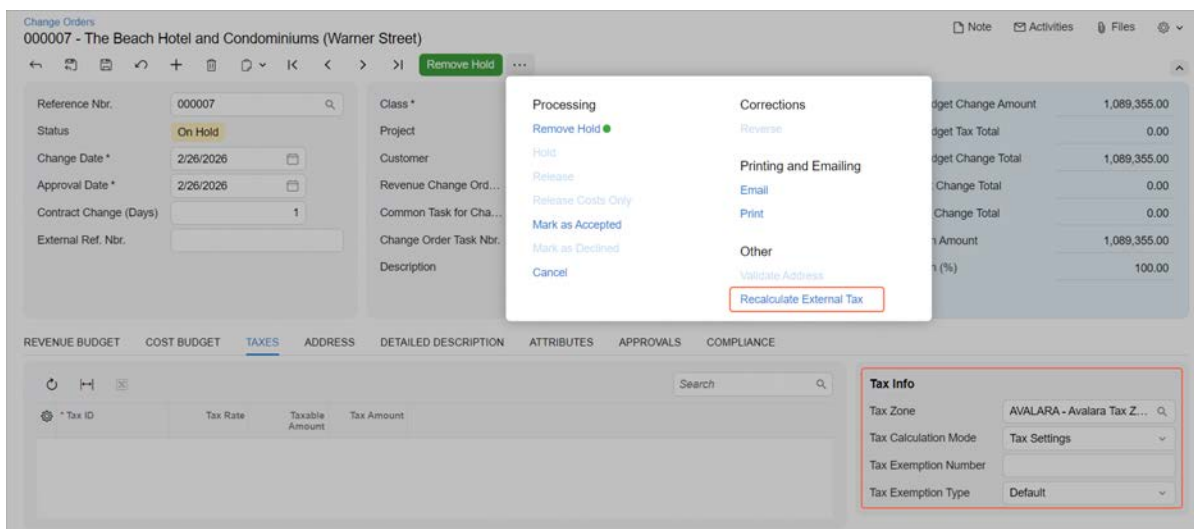


Figure: Recalculating taxes through the integration with Avalara Ava Tax

For details, see [Integrating Acumatica ERP with Avalara Avatax](#) and [Integrating Acumatica ERP with Vertex Tax Provider](#).

Address and Contact for a Change Order

The address of the customer and the contact of the change order are now easy to find on the new **Address** tab of the [Change Orders](#) (PM308000) form. The system copies the project's address and the bill-to contact from the **Addresses** tab of the [Projects](#) (PM301000) form to the change order; you can override them.

The screenshot shows the 'Change Orders' form for '000004 - Italian restaurant (Denver Avenue)'. The 'ADDRESS' tab is selected and highlighted with a red box. The form is divided into several sections:

- Reference Information:** Reference Nbr. (000004), Change Date (4/20/2026), Approval Date (4/20/2026).
- Class and Project:** Class (DEFAULT - Default Change Order Class), Project (ITALIAN2 - Italian restaurant (Denver Avenue)).
- Description:** Additional reinforcing works.
- Summary Table:**

Revenue Budget Change Am...	35,890.00
Revenue Budget Tax Total	3,185.24
Revenue Budget Change Total	39,075.24
Revenue Retainage Total	0.00
Cost Budget Change Total	5,300.00
Gross Margin Amount	30,590.00
Gross Margin (%)	85.23
- Navigation Tabs:** REVENUE BUDGET, COST BUDGET, TAXES, ADDRESS (active), DETAILED DESCRIPTION, ATTRIBUTES, APPROVALS, COMPLIANCE.
- Contact Section:**
 - Override Contact:
 - Account Name: Italian Company
 - Attention: [Empty]
 - Email: Dustin.Lindquist@italianco.example.com
 - Business 1: +1-415-555-0152
 - Business 2: [Empty]
- Address Section:**
 - Override Address:
 - Address Line 1: 1812 Denver Avenue
 - Address Line 2: [Empty]
 - City: San Francisco
 - Country: US - United States of America
 - State: CA - CALIFORNIA
 - Postal Code: 94102
 - Latitude: [Empty]
 - Longitude: [Empty]

Figure: The Address tab

If the *Address Validation Integration* feature is enabled on the [Enable/Disable Features](#) (CS100000) form and integration with an address provider is configured, you can validate the customer's address by clicking the new **Validate Address** command on the More menu.


For details, see [Integrating Acumatica ERP with Address Validation Providers](#).

Printing and Emailing a Change Order with Tax Amounts

When you're ready to share a change order with the customer, you can print or email the [Change Order](#) (PM643000) report. This print-friendly document now has these amounts, as shown below:

- **Change Order Amount**
- **Change Order Tax Amount**
- **Change Order Total**

In the **Owner** section of the printable document, you can view the change order's address, which is copied from the **Address** tab of the [Change Orders](#) (PM308000) form.



ToadGreen Building Group
2295 Oak Street
New York, NY, 13420
Phone: 315-369-5633

Change Order

Reference Nbr.	000004
Change Date	20-Apr-2026
Completion Date	20-Apr-2026
Customer ID	ITACOM
Currency	USD
Project Reference Nbr.	ITALIAN2
Project CO Nbr.	0002
Contract Time Change, Days	1
Description	Additional reinforcing works

Revenue Budget

No.	Project Task	Cost Code	Description	Budgeted Previously Approved CO Amount	Current CO Qty	UOM	Unit Rate	Current CO Amount	Revised Amount
1	CONCRETE	03200	Concrete - Reinforcing	27,625.00	1.00	EA	0.00	35,890.00	63,515.00

Original Contract Amount (USD)	2,186,984.80	Change Order Amount (USD)	35,890.00
Previously Approved CO Amount (USD)	0.00	Change Order Tax Amount (USD)	2,866.71
Prior Revised Contract Amount (USD)	2,186,984.80	Change Order Total (USD)	38,756.71
Revised Contract Amount (USD)	2,222,874.80		

Contractor

ToadGreen Building Group
2295 Oak Street
New York, NY, 13420
Phone: 315-369-5633

20-Apr-2026

(signature)

Owner

Italian Company

1812 Denver Avenue
San Francisco, CA, 94102

20-Apr-2026

(signature)

Figure: The printable document

i Note that these renamed elements don't include tax amounts:

- **Original Contract Amount**, which was called *Original Revenue Budget Total*
- **Previously Approved CO Amount**, which was called *Previously Approved CO Total*
- **Prior Revised Contract Amount**, which was called *Prior Revised Revenue Budget Total*
- **Revised Contract Amount**, which was called *Revised Revenue Budget Total*

Viewing the Calculated Taxes for a Project

Suppose that you've created a new project task from a change order on the [Change Orders](#) (PM308000) form. You've added a taxable revenue budget line and specified the retainage percentage in this line.

When you take this change order from hold, the system will:

- Create a new project budget line

- Copy the retainage percent and tax category to the new **Tax Category** and **Retainage (%)** columns on the **Revenue Budget** tab of the *Projects* (PM301000) form

*Project Task	Cost Code	*Account Group	Description	Original Budgeted Quantity	UOM	Unit Rate	Original Budgeted Amount	Potential CO Quantity	Potential CO Amount	Revised Budgeted Quantity	Revised Budgeted Amount	Retainage (%)	Tax Category
COTASK001	04-400	REVENUE	Masonry - Stone	0.00		0.0000	0.00	0.00	0.00	0.00	25,000.00	5.000000	TAXABLE

Figure: The tax category and retainage percent of the project's new revenue budget line

On the **Change Orders** tab, you can review these amounts for each change order:

- **Revenue Budget Change Amount:** The revenue amount before taxes for exclusive taxes or the revenue amount with taxes for inclusive taxes
- **Revenue Budget Tax Total:** The tax amount calculated for the change order
- **Revenue Budget Change Total:** The change order amount, including tax

Reference Nbr.	*Class	Revenue Change Order Nbr.	Status	Description	*Change Date	*Approval Date	Contract Change (Days)	External Ref. Nbr.	Revenue Budget Change Amount	Revenue Budget Tax Total	Revenue Budget Change Total
000005	DEFAULT	0001	Closed	Additional stone works	2/25/2026	2/25/2026			25,000.00	2,107.81	27,107.81

Figure: The change order amounts and taxes on the Projects form

On the *Project Status* (PM301500) form, these columns have also been added.

This form appears in the Modern UI only if the *360 Dashboards* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Reference Nbr.	Class	Revenue Change Order Nbr.	Status	Description	* Change Date	* Approval Date	Contract Change Ref. Nbr.	External Change (Days)	Revenue Budget Change Amount	Revenue Budget Tax Total	Revenue Budget Change Total
000005	DEFAULT	0001	Closed	Additional stone works	2/25/2026	2/25/2026			25,000.00	2,107.81	27,107.81

Figure: The change order amounts and taxes on the Project Status form

Reversing a Change Order with Taxes

When you reverse a change order, all tax-related settings are copied from the original change order to the reversing change order—the one that's reversing the original order. These settings include:

- The tax zone
- The tax categories
- Address information
- The tax exemption number and tax exemption type if the customer is tax exempt
- The tax calculation mode if the *Net/Gross Entry Mode* feature is enabled on the [Enable/Disable Features \(CS100000\)](#) form

Line amounts on the **Revenue Budget** tab of the [Change Orders \(PM308000\)](#) form become negative, and taxes are automatically recalculated on these negative amounts. This results in negative tax values that reverse the tax impact of the original change order.

Upgrade Notes

After an upgrade to Acumatica ERP 2026 R1, existing change orders will have the following tax-related settings on the [Change Orders \(PM308000\)](#) form:

- **Revenue Budget Tax Total:** 0
- **Revenue Budget Change Total:** Unchanged
- **Revenue Budget Change Amount:** Equal to the **Revenue Budget Change Total** until you calculate taxes
- **Tax Zone:** Empty
- **Tax Category:** Empty for existing revenue budget lines
- **Retained Taxable Amount** and **Retained Tax:** 0

To apply taxes to an existing change order, select the tax zone on the **Taxes** tab, select the tax category on the **Revenue Budget** tab, and save your changes.

Key Capabilities

- Prepare a change order with the tax included before you send it to the customer, ensuring that the approved change order amounts match the project invoice amounts.

- Calculate the sales tax or VAT in a change order by using the taxes configured in the system or calculated through an external tax provider.
- Print or email change orders that include the tax and total amounts, speeding up change order and invoice approvals.

Retail Commerce: Enhanced Mapping for eCommerce Connectors

You now have more control over how eCommerce connectors handle field mapping. Acumatica ERP 2026 R1 introduces a standardized mechanism so that you can unmap fields and apply system default mappings in formulas. You can use this mechanism for both export mappings and import mappings across the Shopify, Amazon, and BigCommerce connectors.

Let's take a look at how to get this functionality set up and start using it.

Configuring Mapping

For all entities on the [Entities](#) (BC202000) form, you can now use two new keywords in mapping formulas in the following columns:

- **External Field / Value** on the **Import Mapping** tab
- **ERP Field / Value** on the **Export Mapping** tab

When you open the Formula Editor dialog box for either column, you can find the following new keywords in the *Keywords* group, as shown below:

- **Unmap**: Explicitly unmaps a field. In earlier versions of Acumatica ERP, the Unmap option was available but couldn't be used within formula-based mappings.

If the field is required, the connector uses either the default value or NULL if there is no default value defined.

- **DefaultMapping**: References the default field mapping defined for the connector. When the keyword is applied, the system follows the default behavior as though no manual mapping is configured. This keyword is especially useful when you want to preserve or conditionally apply the default behavior.

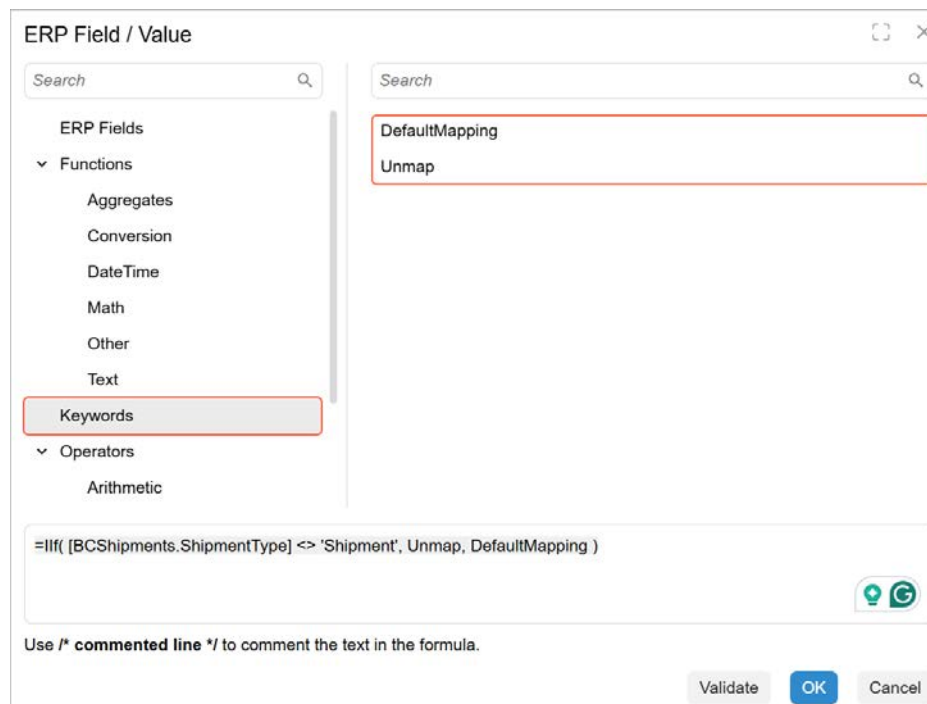


Figure: The Unmap and DefaultMapping keywords in the Formula Editor

The following example shows how to use the `Unmap` and `DefaultMapping` keywords in a formula. This formula inserts the tracking number (`DefaultMapping`) for a Shopify order only if the shipment type is `Shipment`. Otherwise, the external field is unmapped (`Unmap`), and the connector assigns no tracking number.

The screenshot displays the 'Entities' configuration page for a Shopify connector. The 'EXPORT MAPPING' tab is active, showing a table of mappings. The 'Tracking Number' field is highlighted with a red border, and its formula is: `=If([BCShipments.ShipmentType] <> 'Shipment', Unmap, DefaultMapping)`.

External Object	External Field	ERP Object	ERP Field / Value
Shipment Data -> Fulfillment -> Tracking Info	Tracking Number	Sales Order Shipment	<code>=If([BCShipments.ShipmentType] <> 'Shipment', Unmap, DefaultMapping)</code>

Figure: Using the `Unmap` and `DefaultMapping` keywords in formulas

Retail Commerce: Importing BigCommerce Companies

In Acumatica ERP 2026 R1, the BigCommerce connector now supports importing core B2B company data from BigCommerce B2B Edition into Acumatica ERP. You can import B2B companies along with their addresses and hierarchies, bring in company users, and synchronize orders placed on these users' behalf.

These enhancements provide clearer visibility into customer relationships and organizational structures. They also improve data consistency between systems and make it easier and more efficient to manage BigCommerce B2B customers in Acumatica ERP.



This functionality is available if the new *BigCommerce Business-to-Business Entities* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Companies in BigCommerce B2B Edition

In BigCommerce, a *company* represents a B2B buying organization—that is, a customer or prospective customer for your organization. You manage each company's users (your contacts) and their roles, shipping and billing addresses, and company-specific settings on the **Companies** page of the B2B Edition control panel, as shown below.

You can also define a company hierarchy, where one company acts as the parent of another.

Figure: A company in the BigCommerce B2B Edition

Configuring the BigCommerce Store

You import companies from BigCommerce by using the new *Company* entity, which you activate on the **Entities** tab of the *BigCommerce Stores* (BC201000) form. BigCommerce companies are represented in Acumatica ERP as customers, and the system uses the same settings for importing companies as it does to import customers. You specify these settings on the **Customers** tab, including the customer class, customer numbering sequence, and location numbering sequence.

The only new element on the tab is the **Import Company Users as Customers** check box, shown below, which is cleared by default. When it's cleared, company users are imported as contacts only. If you select the check box, company users are always imported as both customers and contacts.

The screenshot shows the 'BigCommerce Stores' configuration page for 'Acumatica'. The 'CUSTOMERS' tab is selected. Under the 'Customer' section, several dropdown menus are visible for 'Customer Class', 'Customer Numbering Sequence', and 'Location Numbering Sequence'. A 'B2B Customer' section is highlighted with a red border, containing a checkbox for 'Import Company Users as Customers'. The 'Active' checkbox is checked, and the 'Default' checkbox is unchecked.

Figure: BigCommerce store settings for importing companies

Importing Companies from BigCommerce

When a company is imported from a BigCommerce store to Acumatica ERP, the system creates the following records:

- A customer of the *Organization* customer category on the [Customers](#) (AR303000) form for the company
- A customer location on the [Customer Locations](#) (AR303020) form for each company address in the BigCommerce store
- A contact on the [Contacts](#) (CR302000) form for each company user in the BigCommerce store
- A customer of the *Individual* category on the [Customers](#) form for each company user in the BigCommerce store if either of the following conditions is met:
 - The **Import Company Users as Customers** check box is selected on the **Customers** tab of the [BigCommerce Stores](#) (BC201000).
 - The user has placed at least one order in the BigCommerce store.

During the initial company import, the connector first checks whether a company—defined as a customer with the *Organization* customer category—already exists in Acumatica ERP with a matching external ID. If no match is found, the connector then searches for a company with the same email address.

Because BigCommerce allows multiple companies to share the same email address, companies with duplicate email addresses—either in BigCommerce or in Acumatica ERP—cannot be synchronized.

Creating Customers in Acumatica ERP for BigCommerce Companies

In Acumatica ERP, a customer is created on the [Customers](#) (AR303000) form for each imported BigCommerce company. The customer is assigned the following settings:

- **Customer Category (General tab):** *Organization*

- **Account Address (General tab):** The company's legal address
- **Ext. Ref. Nbr. (General tab):** The external ID of the company in BigCommerce and the store name in Acumatica ERP
- **Legal Name, Email, Phone number (General tab):** The basic company information
- **Parent Account (Financial):** The parent company if the corresponding company has been imported to Acumatica ERP



This functionality is available if the *Parent-Child Customer Relationship* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

- **Bill-To Address (Billing tab):** The company's default billing address
- **Ship-To Address (Shipping tab):** The company's default shipping address
- **Price Class (Shipping tab):** The company's customer group if the corresponding *Customer Price Class* sync record has been imported

Creating Locations in Acumatica ERP for BigCommerce Company Addresses

In Acumatica ERP, a customer location is created on the [Customer Locations](#) (AR303020) form for each company address in BigCommerce. The location has the following settings:

- **Default** (Summary area): Selected if the address is the default shipping address
- **Status** (Summary area): *Inactive* if the address has both the **Shipping** check box and the **Billing** check box cleared
- **Billing Only** (Summary area): Selected if the address has the **Shipping** check box cleared and the **Billing** check box selected
- **External ID (General tab):** The external ID of the address in BigCommerce and the store name in Acumatica ERP

The system creates the default *Main* location with no address if either of the following conditions is met:

- The company has no address specified.
- All addresses have both the **Shipping** check box and the **Billing** check box cleared.

Creating Contacts in Acumatica ERP for BigCommerce Company Users

An Acumatica ERP contact is created on the [Contacts](#) (CR302000) form for each company user in BigCommerce. The contact is assigned the following settings on the **General** tab:

- **Name, Email, Phone number:** The basic information for the person
- **Job Title:** The person's role
- **Ext. Ref. Nbr.:** The external ID of the user in BigCommerce and the store name in Acumatica ERP

The user with the *Admin* role and the earliest creation date in BigCommerce is defined as the company's primary contact. If the company has no *Admin* users, the user with the earliest creation date is defined as the company's primary contact instead.

Company users with the *Super Admin* role in BigCommerce are not imported into Acumatica ERP because a *Super Admin* user in BigCommerce can be associated with multiple companies.

Synchronization of Sales Orders for Companies

Acumatica ERP supports bidirectional synchronization of sales orders created on behalf of companies.

When importing orders created by company users on behalf of their companies from BigCommerce, the system inserts the company as the **Customer** on the [Sales Orders](#) (SO301000) form. The user who placed the order is

specified as the **Contact**, and the address used when placing the order in BigCommerce is imported as a company location.

When exporting sales orders created for companies along with their associated contacts from Acumatica ERP, the system links each order to the company in BigCommerce. If an order has been fully paid in Acumatica ERP, it's created in BigCommerce with the *Awaiting Fulfillment* status. Otherwise, it's created with the *Awaiting Payment* status.

Other Changes

On the [Enable/Disable Features](#) (CS100000) form, the *Business-to-Business Entities* feature has been replaced with the following connector-specific features:

- *BigCommerce Business-to-Business Entities*
- *Shopify Business-to-Business Entities*

To synchronize:

- The *Company* entity for BigCommerce stores, you enable the *BigCommerce Business-to-Business Entities* feature.
- The *Price List* and *Customer Price Class* entities for BigCommerce stores, you enable only the *BigCommerce Connector* feature. In other words, you can now synchronize price lists and customer price classes without enabling the *BigCommerce Business-to-Business Entities* feature.

The *Price List* and *Company* entities for Shopify stores, you enable the *Shopify Business-to-Business Entities* feature.

Feature Highlights

Acumatica ERP now supports importing companies from BigCommerce B2B Edition. To get started, you activate the *Company* entity on the **Entities** tab of the [BigCommerce Stores](#) (BC201000) form. The configuration settings used for importing customers are also applied to BigCommerce companies.

When companies are imported, their addresses, hierarchies, and company users are also imported. In addition, Acumatica ERP supports bidirectional synchronization of orders placed on behalf of these companies, ensuring consistent and up-to-date data across both systems.

Retail Commerce: Acumatica Payments Is Now Available for BigCommerce

Acumatica ERP 2026 R1 lets you import BigCommerce payments that were processed through Acumatica Payments, helping you keep payment data synchronized between systems. The BigCommerce connector supports all card transaction types, including authorized, captured, voided, and refunded payments.



This functionality is available if the new *Acumatica Payments* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Configuration of Acumatica Payments

You configure a payment method with a cash account and a processing center for Acumatica Payments. For more information on configuring Acumatica Payments, see [Configuring and Using Acumatica Payments](#).

Next, on the **Payments** tab of the [BigCommerce Stores](#) (BC201000) form, you activate the *ACUMATICA PAYMENTS* payment method and specify the ERP payment method, cash account, and processing center you've configured, as shown below. That's it!

The screenshot shows the 'BigCommerce Stores' configuration form for 'Acumatica'. The 'Payments' tab is selected, displaying a table of payment methods. The 'ACUMATICA PAYMENTS' method is highlighted and has its 'Active' checkbox checked. Other methods listed include AMAZON, AUTHORIZENET (CREDIT_CARD), BRAINTREE, CHEQUE (OFFLINE), COD (OFFLINE), CUSTOM (CUSTOM), GIFTCERTIFICATE (GIFT_CERTIFICATE), PAYPAL, STORECREDIT (STORE_CREDIT), STRIPE, and TEST PAYMENT GATEWAY.

Active	*Store Payment Method	*Store Currency	ERP Payment Method	Cash Account	Proc. Center ID	Release Payments and Refunds	Process Refunds
<input checked="" type="checkbox"/>	ACUMATICA PAYMENTS	USD	ACUPAY	10250ST	ACUPAY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AMAZON	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	AUTHORIZENET (CREDIT_CARD)	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	BRAINTREE	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CHEQUE (OFFLINE)	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	COD (OFFLINE)	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CUSTOM (CUSTOM)	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	GIFTCERTIFICATE (GIFT_CERTIFICATE)	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	PAYPAL	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	STORECREDIT (STORE_CREDIT)	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	STRIPE	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	TEST PAYMENT GATEWAY	USD				<input type="checkbox"/>	<input type="checkbox"/>

Figure: BigCommerce store settings for Acumatica Payments

Recommended Refund Workflow

For BigCommerce orders paid with Acumatica Payments, we recommend the following refund workflow due to the limitations described in the next section:

1. Create a refund in BigCommerce.
2. Import the refund into Acumatica ERP as refunds in the *Pending Processing* status.
3. Process the refund in Acumatica ERP.

Following this workflow helps ensure that refunds are synchronized correctly across BigCommerce, Acumatica ERP, and the Acumatica Payments gateway and processed without errors.

Limitations

Before using Acumatica Payments with BigCommerce, be sure you understand the following limitations:

- Because Acumatica Payments doesn't support managing card refunds from the BigCommerce store admin panel, the connector creates pending card refunds in Acumatica ERP by using offline refunds for orders paid through Acumatica Payments.
- The Acumatica Payments app supports only one currency per connected store.
- AcuParam ACH transactions can be imported only as cash or check transactions. The connector imports only the transaction data that BigCommerce provides through its standard order transaction APIs. As a result, ACH Void and ACH Refund transactions are not synchronized unless the order contains a corresponding offline transaction in BigCommerce.
- Refunds processed directly through the payment gateway aren't synchronized unless they're also added to BigCommerce as offline refunds. If a refund is issued only through the gateway, it must be manually added to BigCommerce to be imported.
- Void operations for refund transactions can't be synchronized because this action isn't supported in Acumatica ERP. If an order contains one or more refunds and at least one of these has been voided, the refund must be created manually in Acumatica ERP for card refunds.

Retail Commerce: Acumatica Payments Is Now Available for Shopify

Acumatica ERP 2026 R1 now supports importing Shopify payments that were processed through Acumatica Payments. The Shopify connector can bring in all card transaction types, including authorized, captured, voided, and refunded payments.



This functionality is available if the new *Acumatica Payments* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Configuration of Acumatica Payments

You configure a payment method with a cash account and a processing center for Acumatica Payments. For more information on configuring Acumatica Payments, see [Configuring and Using Acumatica Payments](#).

Next, on the **Payments** tab of the [Shopify Stores](#) (BC201010) form, you activate the *AUMATICA PAYMENTS* payment method and specify the ERP payment method, cash account, and processing center you've configured, as shown below. That's it!

Active	*Store Payment Method	*Store Currency	ERP Payment Method	Cash Account	Proc. Center ID	Release Payments and Refunds	Process Refunds
<input checked="" type="checkbox"/>	ACUMATICA PAYMENTS	USD	ACUPAY	10250ST	ACUPAY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AMAZON	USD				<input type="checkbox"/>	<input type="checkbox"/>

Figure: Shopify store settings for Acumatica Payments

Retail Commerce: Enhanced Sync of Shopify POS Orders

In Acumatica ERP 2026 R1, we've improved the Shopify connector to streamline address handling for point-of-sale (POS) orders that don't require shipping and have been submitted without a customer.

What's Been Enhanced

An imported Shopify POS order may lack both a customer and shipping details—that is, no shipping or billing address has been provided. The connector now automatically fills in the ship-to and bill-to addresses on the **Addresses** tab of the [Sales Orders](#) (SO301000) form, as shown below. In the imported POS order, the connector inserts:

- The generic guest customer defined on the **Customers** tab of the [Shopify Stores](#) (BC201010) form.
- The address settings specified for the generic customer. If it has no addresses specified (as with the generic customer shown below), the system leaves these settings blank.

The screenshot shows the Acumatica ERP interface for a Sales Order. The order is identified as 'IN 000125 - eCommerce Guest Customer'. The 'Addresses' tab is active, showing two address sections: 'Ship-to Address' and 'Bill-to Address'. Both sections have 'Override Address' checked and show default values for Country (US - United States of America) and State. The order summary on the right indicates an Order Total of 110.00.

Field	Value
Order Type *	IN
Order Nbr.	000125
Status	Open
Date *	11/3/2025
Requested On *	11/3/2025
Customer Order Nbr.	#3165
External Reference	6961758339270 - Shopify
Customer *	ECOMGUEST - eCommerce Guest Customer
Location *	MAIN - Primary Location
Contact	
Project *	X - Non-Project Code.
Description	Shopify POS Order: #3165 Status: PAID
Ordered Qty.	1.00
Detail Total	110.00
Line Discounts	0.00
Document Discounts	0.00
Freight Total	0.00
Tax Total	0.00
Order Total	110.00

Figure: An imported POS order that had no customer and shipping details in Shopify

Retail Commerce: Importing Shopify Documents in the Store Currency

Shopify stores can support multiple currencies, with one designated as the default store currency. Customers can pay in a currency that's different than the default one. In Acumatica ERP 2025 R1, the Shopify connector introduced the ability to import orders—along with the related payments and refunds—in a single currency: the store's default currency. This improvement helped businesses maintain consistent financial reporting and simplified reconciliation for stores that operate primarily in one currency.

However, newly connected stores still imported Shopify documents in the paid currency by default. This default behavior often caused confusion, especially for users working in multicurrency environments who expected imported documents to use the store currency instead.

To make configuration simpler and reduce confusion, Acumatica ERP 2026 R1 updates this default behavior. The Shopify connector now imports orders and related documents using the store currency by default unless you choose a different option.

Let's take a look at what's changed.

What Has Changed

On the **Orders** tab of the [Shopify Stores](#) (BC201010) form, the **Import in External Default Currency** check box has been renamed to **Use Payment Currency instead of Store Currency**, as shown below. The check box remains cleared by default for newly created stores. As a result, new stores will import documents in only the store currency unless the check box is selected. When it's selected, the system imports documents in the payment currency, which may vary by document.

Shopify Stores
Shopify SweetStore - SP

Connector: Shopify
Store Name: SweetStore - SP

Active:
Default:

GENERAL ENTITIES CUSTOMERS INVENTORY **ORDERS** PAYMENTS SHIPPING

Branch: RETAIL - SweetLife Store

Order

Order Type for Import: EO - eCommerce Order
Order Types for Export:
Return Order Type:
Refund Amount Item: REFUNDAMT - eCommerce Refund Amount Item
Refund Reason Code:
Order Time Zone: (GMT-05:00) Eastern Time (US & Canada)
Show Discounts As: Line Discounts
 Import Order Risks
Hold on Risk Status: High Risk
Gift Certificate Item:
Earliest Order Date:
 Tag Ext. Order with ERP Order Nbr.
 Allow Adding Items to Processed Orders
 Use Payment Currency Instead of Store Currency
 Update Terms on Processed Orders

Substitution Lists

Taxes: SPCTAXCODES
Tax Categories: SPCTAXCLASSES
Shipping Carriers: SPCCARRIERS

Sales Quote Orders

Quote Order Type for Import: QT - Quote
Quote Order Type for Export: QT - Quote
Earliest Date for Quote Order: 1/9/2025

Figure: Shopify store settings for importing documents in the store currency

On the **General** tab, the **Default Currency** box has been renamed to **Store Currency**, as shown below. This box is displayed only when the **Use Payment Currency instead of Store Currency** check box on the **Orders** tab is cleared and shows the currency that the system uses for imported documents.

Shopify Stores
Shopify SweetStore - SP

Connector: Shopify
Store Name: SweetStore - SP

Active:
Default:

GENERAL **ENTITIES** CUSTOMERS INVENTORY **ORDERS** PAYMENTS SHIPPING

Connection

Store Admin URL: https://edu25r2.myshopify.com/admin/
API Access Token: *****
API Secret Key: *****

Miscellaneous

Locale:
Administrator:
Store Properties

Store URL: edu25r2.myshopify.com
API Version: 2025-10
Store Currency: USD
Store Time Zone: (-0500 EST) America/New_York
Store Plan: Shopify

License Restrictions

Max. Number of Stores: 5

Figure: The default currency of the Shopify store

In the same section on the **General** tab, the **Supported Currencies** box has been renamed to **Payment Currencies**. This box is displayed only when the **Use Payment Currency instead of Store Currency** check box is selected and shows the currencies the system uses for imported documents.



If the *Sales Order*, *Payment*, or *Sales Quote* entities are active for the store, all currencies listed in the **Store Currency** or **Payment Currencies** boxes must be active on the [Currencies](#) (CM202000) form.

If the *Payment* entity is active, you must also configure mappings on the **Payments** tab of the [Shopify Stores](#) form for all Shopify payment methods used in any currency listed in the **Store Currency** or **Payment Currencies** box.

Retail Commerce: Importing Marketplace-Remitted Taxes from Shopify

A Shopify store can sell through multiple channels, including online marketplaces such as Amazon, Facebook, Instagram, and the Shop Marketplace. In some regions, tax regulations require these marketplaces to collect and remit taxes on the seller's behalf for orders placed through their platforms.

Shopify marks these taxes as *channel-liable*, meaning that the marketplace handles tax remittance instead of the merchant. In Acumatica ERP 2026 R1, you can configure marketplace-withheld taxes and clearly distinguish them from taxes on regular orders. These taxes are also imported for orders placed through marketplace channels, helping to ensure accurate reporting and easier reconciliation across multiple sales channels.

Configuring Marketplace-Remitted Taxes

As the first step in setting up taxes remitted by marketplaces, you enable the *Tax Withheld by Marketplaces* feature on the [Enable/Disable Features](#) (CS100000) form.

Next, on the **Orders** tab of the [Shopify Stores](#) (BC201010) form, configure the tax synchronization for regular Shopify orders, as described in [Importing Orders with Taxes](#).

The system automatically adds sales channels from your Shopify store to the table in the **Taxes** section, as shown below. Select the **Active** check box for the marketplaces from which you want to import taxes to specific tax zones and tax IDs, instead of using the settings for regular orders. For each selected marketplace, specify the tax zone and tax ID. Taxes will be imported to the tax-payable account defined for the tax zone.



The connector supports only one tax-payable account per store currency for all marketplace channels.

If you specify multiple tax zones and tax IDs for a marketplace channel, select the **Default** check box for one of them. The system uses these settings when no matching tax zone is found during order import.

The screenshot shows the 'Shopify Stores' form for 'SweetStore - SP' in the 'ORDERS' tab. The 'Taxes' section is expanded, showing a table of marketplace channels. The table has columns for 'Active', 'Default', 'Marketplace Channel', 'Tax Zone', 'Tax ID', 'Tax Zone is Based On', 'Country', and 'Tax Payable Account'. The following table represents the data shown in the screenshot:

Active	Default	Marketplace Channel	Tax Zone	Tax ID	Tax Zone is Based On	Country	Tax Payable Account
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Facebook	FACEBOOK	FACEBOOK	Countries		24200
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Instagram	INSTAGRAM	INSTAGRAM	States	US	24200
<input type="checkbox"/>	<input type="checkbox"/>	Meta Web Checkout					
<input type="checkbox"/>	<input type="checkbox"/>	Shop					

Figure: Shopify sales channels and their tax settings

For the payment method used by marketplace channels, you also configure the *MarketplaceSalesTaxAdjustment* charge in the **Payment Fees** table on the **Payments** tab, as shown below. For this charge, you select an entry type that is assigned to the cash account of the payment method and also meets the following criteria on the [Entry Types](#) (CA203000) form:

- Has the *Disbursement* type
- Has the **Deduct from Payment** check box cleared
- Uses the same **Default Offset Account** as the tax payable account specified for the marketplace channel

The screenshot shows the Acumatica ERP configuration for a Shopify store. The 'PAYMENTS' tab is selected, and the 'MarketplaceSalesTaxAdjustment' fee is highlighted in red. The table below shows the configuration for various payment methods and fees.

Active	* Store Payment Method	* Store Currency	ERP Payment Method	Cash Account	Proc. Center ID	Release Payments and Refunds	Process Refunds
<input checked="" type="checkbox"/>	MANUAL	USD	ONLINE	10250ST		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ACUMATICA PAYMENTS	USD	ACUPAY	10250ST	ACUPAY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AMAZON	USD				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	AUTHORIZENET	USD				<input type="checkbox"/>	<input type="checkbox"/>

Active	* Fee Type	ERP Entry Type	Entry Type Description	Transaction Type	Default Offset Account
<input checked="" type="checkbox"/>	MarketplaceSalesTaxAdjustment	INSTAGRAM	Instagram Taxes	Disbursement	24200

Figure: The *MarketplaceSalesTaxAdjustment* charge

How Marketplace-Remitted Taxes Are Imported

When you import an order from Shopify, Acumatica ERP brings in taxes along with the order data. If an order is placed through a sales channel with tax mapping configured in Acumatica ERP, the system uses the mapped tax ID to group all channel-liable taxes from Shopify into a single tax line. In the imported sales order, this tax line appears on the **Taxes** tab of the *Sales Orders* (SO301000) form.

If multiple tax zones are mapped to a marketplace channel, the system uses the shipping address from Shopify to determine which tax zone to apply to the imported order. It checks the list of active tax mappings for the marketplace on the **Orders** tab of the *Shopify Stores* (BC201010) form in the following order until it finds a matching tax zone:

1. It looks for a tax zone that matches the postal code.
2. It checks for one that matches the state.
3. It looks for a match by country.
4. It uses the default tax zone.

When you import payments and refunds for such an order, Acumatica ERP deducts the total withheld tax from the resulting prepayments and refunds. It does this by adding the *MarketplaceSalesTaxAdjustment* charge on the **Charges** tab of the *Payments and Applications* (AR302000) form.

Limitations

- The feature supports synchronization only for marketplace orders with tax-exclusive item prices.

- When the *Tax Withheld by Marketplaces* feature is enabled, orders that include a mix of channel-liable and non-liable taxes can be imported only if all taxes are linked to the Acumatica ERP tax zone mapped to the marketplace channel from which the order originated.
- The handling of marketplace-withheld taxes is supported only for Shopify sales channels classified as marketplaces.
- The connector doesn't add deducted charges to the partial payments of imported marketplace orders. Only the final payment, which reduces the unpaid balance to 0, includes the *MarketplaceSalesTaxAdjustment* charges.
- When the *Tax Withheld by Marketplaces* feature is enabled and you use an external tax provider for tax reporting, you must connect that tax provider to Shopify if you need to include marketplace-remitted taxes in tax returns. If you instead use Acumatica ERP for tax reporting, you can record marketplace-withheld taxes by creating a manual tax adjustment for the total amount withheld during the reporting period.
- If a marketplace order that already includes *MarketplaceSalesTaxAdjustment* charges is updated in Shopify in a way that changes the remitted tax amount, the connector doesn't update the existing payment—even if it hasn't been released. The connector doesn't reverse existing adjustment charges. Instead, if a new transaction appears in Shopify, it creates a new payment with adjustment charges to reflect the tax difference.

Retail Commerce: Syncing Sales Quotes with Shopify

Draft orders in Shopify let you apply custom discounts, special shipping rates, and flexible invoice options—making them perfect for custom requests or complex sales scenarios. In Acumatica ERP 2026 R1, you can now sync Shopify draft orders as sales quotes, keeping your quote data accurate across platforms.



Imported draft orders appear as sales quotes on the [Sales Orders](#) (SO301000) form in Acumatica ERP.

Read on to discover how to set up this synchronization and start using it.

Configuring the Synchronization

To set up the synchronization of Shopify draft orders as sales quotes, update the store's settings on the [Shopify Stores](#) (BC201010) form:

1. On the **Entities** tab, activate the *Sales Quote* entity.
2. On the same tab, select the sync direction for the *Sales Quote* entity that fits your workflow:
 - *Import*: Create and maintain draft orders in Shopify and import them as sales quotes to Acumatica ERP
 - *Export*: Create and maintain sales quotes in Acumatica ERP and export them to Shopify as draft orders
 - *Bidirectional*: Synchronize sales quotes in both directions to keep data consistent across both systems
3. In the new **Sales Quote Orders** section on the **Orders** tab, specify the following settings, as shown below:
 - **Quote Order Type for Import**: The order type to be used to create sales quotes when draft orders are imported from Shopify. You can select an order type that has the *Quote* automation behavior and the *Issue* operation specified on the **Template** tab of the [Order Types](#) (SO201000) form.
 - **Quote Order Type for Export**. The order types to be used to export sales quotes created in Acumatica ERP as draft orders to Shopify. You can select multiple order types that have the *Quote* automation behavior and the *Issue* operation specified.



Even if no order type for export is specified, the system can still export sales quotes of the type defined for import.

- **Earliest Quote Order Date**: The earliest date for sales quotes to be synced. The system will import draft orders from Shopify or export sales quotes from Acumatica ERP that were created on or after this date.

Figure: New settings for synchronizing sales quotes on the Shopify Stores form

Importing Sales Quotes

To import draft orders from Shopify, prepare and process the data for the *Sales Quote* entity by using the [Prepare Data](#) (BC501000) and [Process Data](#) (BC501500) forms. The system imports draft orders that:

- Aren't yet completed
- Were created on or after the earliest quote order date specified in the store's settings

For each imported draft order, the system creates a sales quote on the [Sales Orders](#) (SO301000) form with the order type specified for quote import in the store's settings.

Exporting Sales Quotes

To export sales quotes to Shopify, prepare and process the data for the *Sales Quote* entity by using the [Prepare Data](#) (BC501000) and [Process Data](#) (BC501500) forms. The system exports sales quotes that:

- Have the order type specified for quote export (or import) in the store's settings.
- Aren't completed, canceled, or on hold
- Were created on or after the earliest quote order date specified in the store's settings.

For each exported sales quote, the system creates a draft order in the Shopify store. The connector doesn't synchronize canceled or completed sales quotes. When synchronizing a quote that was already exported and then completed or canceled, the connector assigns the *Canceled* or *Completed* tag to the corresponding draft order in Shopify.

Working with Imported Sales Quotes

You can edit an imported sales quote on the [Sales Orders](#) (SO301000) form and continue updating the corresponding draft order in the Shopify store. Changes made in both systems can be synchronized if bidirectional synchronization is used.



If you aren't using bidirectional synchronization, we recommend updating sales quotes only in the primary system—Shopify for import and Acumatica ERP for export.

To finalize a sales quote—that is, to convert it to a sales order and complete the quote in the process—choose one of the following workflows.

Option 1: Finalize It in Acumatica ERP

1. Create a sales order by copying the sales quote on the [Sales Orders](#) form.

By default, the new sales order is assigned the type specified in the **Order Types for Export** box on the **Orders** tab of the [Shopify Stores](#) (BC201010) form. When you create the sales order, the sales quote is assigned the *Completed* status in Acumatica ERP.

2. Sync the sales quote in Acumatica ERP.

The draft order in Shopify remains open but is marked with the *Completed* tag. You can filter these orders by tag. Also, you can manually delete the order from Shopify, if necessary. When you delete the order, the sync record in Acumatica ERP is assigned the *Deleted* status and excluded from future syncs.

3. Export the created sales order to the Shopify store.

Option 2: Finalize It in Shopify

1. Create an order directly from the draft order in your Shopify store, which causes the draft order to get the *Completed* status there.
2. Sync the sales quote in Acumatica ERP.

The sales quote remains open, but a notification appears below the title bar on the [Sales Orders](#) form, as shown below, indicating that the draft order has been completed.

Field	Value
Order Type *	QT
Order Nbr.	000123
Status	Open
Date *	10/31/2025
Requested On *	10/31/2025
Customer Order Nbr.	#D7
External Reference	999708426425 - S
Customer *	C000000001 - Melody Keys
Location *	MAIN - Primary Location
Contact	Melody Keys
Project *	X - Non-Project Code.
Description	SweetStore - SP Order: #D7 Status: Completed
Ordered Qty.	2.00
Detail Total	90.30
Line Discounts	0.00
Document Discounts	0.00
Freight Total	0.00
Tax Total	0.00
Order Total	90.30

Figure: A sales quote for which the draft order has been completed in Shopify

You'll no longer be able to copy this sales quote in Acumatica ERP to create a sales order.

Key Takeaways

Now you can keep your sales quotes accurate and in sync across platforms. You can import draft orders from Shopify and view them as sales quotes in Acumatica ERP—as well as create sales quotes in Acumatica ERP and export them to Shopify. With these flexible synchronization capabilities, you can manage and process these quotes in the system that best fits your workflow.

Retail Commerce: Syncing Payment Terms for Shopify Orders

In previous versions, you could already sync payment terms from Shopify orders (shown below) with the credit terms of Acumatica ERP sales orders. In Acumatica ERP 2026 R1, we've expanded this capability by adding more flexible mapping of credit term and support for syncing payment terms on draft orders.

The screenshot displays a Shopify order interface for order #1009. At the top, there are status indicators: 'Payment pending' and 'Unfulfilled'. The order date is November 20, 2025 at 10:15 am from Draft Orders. Below this, there is a section for 'Unfulfilled (3)' items, showing a 'Standard' shipping method and a line item for 'Apple jam 96 oz' (SKU APJAM96) with a unit price of \$45.15 and a quantity of 3, totaling \$135.45. Action buttons include 'Mark as fulfilled' and 'Create shipping label'. A 'Payment pending' section follows, showing a summary table:

Subtotal	3 items	\$135.45
Shipping	Standard (18.78 lb: Items 18.78 lb, Package 0.0 lb)	\$0.00
Taxes	Tax details ▾	\$12.03
Total		\$147.48
Paid		\$0.00
Balance	Due Nov 27, 2025 Net 7	\$147.48

At the bottom of the payment section, there are buttons for 'Send invoice' and 'Collect payment'.

Figure: Payment terms assigned to an order in Shopify

Let's take a look at what's new.

Configuring Credit Terms in Acumatica ERP

In Acumatica ERP, you define credit terms on the [Credit Terms](#) (CS206500) form. The system imports the list of Shopify payment terms and displays them on the **Customers** tab of the [Shopify Stores](#) (BC201010) form. In the **ERP Credit Terms** column, you map payment terms from Shopify with credit terms defined in Acumatica ERP, as shown below.

Shopify Stores
Shopify SweetStore - SP

Connector: Shopify
Store Name: SweetStore - SP

Active
Default

GENERAL ENTITIES CUSTOMERS INVENTORY ORDERS PAYMENTS SHIPPING

Customer

Customer Class: ECCUSTOMER - Online Customers
Customer Numbering Template:
Customer Numbering Sequence: ECCUSTOMER - Customer Numbering Sequence...
Location Numbering Template:
Location Numbering Sequence:
Generic Guest Customer: ECOMGUEST - eCommerce Guest Customer
 Use Multiple Guest Accounts

B2B Customer

Import Company Contacts as Customers

Always Export Credit Terms

Payment Terms

Payment Terms Name	Payment Terms Type	ERP Credit Terms
> Due on fulfillment	FULFILLMENT	
Due on receipt	RECEIPT	
Fixed	FIXED	
Net 15	NET	15D
Net 30	NET	30D
Net 45	NET	45D
Net 60	NET	60D
Net 7	NET	7D
Net 90	NET	90D

Figure: Mapping of Shopify payment terms with credit terms

The system uses these mappings to sync payment terms across systems for orders, draft orders, and customers.

You may want to prevent credit terms in already-imported sales orders from being updated if payment terms are changed in Shopify orders if mappings are updated in Acumatica ERP. To do this, you clear the **Update Terms on Processed Orders** check box (shown below) on the **Orders** tab of the [Shopify Stores](#) form.

The screenshot shows the 'Shopify Stores' configuration page for 'SweetStore - SP'. The 'ORDERS' tab is selected. In the 'Order' section, the 'Update Terms on Processed Orders' checkbox is highlighted with a red box. Other visible settings include 'Branch' (RETAIL - SweetLife Store), 'Order Type for Import' (EO - eCommerce Order), 'Substitution Lists' (SPCTAXCODES, SPCTAXCLASSES, SPCCARRIERS), and 'Sales Quote Orders' (QT - Quote).

Figure: Disabling updating credit terms in already-imported orders



In previous versions of Acumatica ERP, you matched Shopify payment terms with Acumatica ERP credit terms by using a substitution list. This substitution list was selected in the **Payment Terms** box on the **Orders** tab of the [Shopify Stores](#) form. This setting has been removed.

Importing Payment Terms from Shopify Orders

When an order or draft order with payment terms is imported from Shopify, the system determines which credit terms to insert in the **Terms** box on the **Financial** tab of the [Sales Orders](#) (SO301000) form as follows:

1. It checks whether the payment terms are mapped to any credit terms in the **Payment Terms** table on the **Customers** tab of the [Shopify Stores](#) (BC201010) form.
2. If no mapping is found, it checks whether any credit terms with the same name exist on the [Credit Terms](#) (CS206500) form.
3. If no matching credit terms exist, it uses the credit terms specified for the customer on the **Financial** tab of the [Customers](#) (AR303000) form.
4. If the customer has no credit terms specified, the system assigns no credit terms to the order.

Exporting Credit Terms to Shopify Orders

The system exports credit terms from an Acumatica ERP sales order to a Shopify order or draft order based on whether an invoice has been created for that sales order in Acumatica ERP. If a mapping exists in the store settings, the system exports the credit terms as follows:

- **If no invoice has been created:** The system exports the credit terms only if the corresponding payment terms are of the *Fulfillment* or *Receipt* type.
- **If at least one invoice has been created:** The system exports the credit terms. If the corresponding payment terms are of the *Fixed* or *Net* type, the system also exports the invoice date from Acumatica ERP as the order issue date to Shopify and the invoice due date from Acumatica ERP as the payment due date to Shopify. If multiple invoices have been created for the sales order, the system uses the dates from the latest invoice.

Key Takeaways

You can now sync payment terms between Shopify and Acumatica ERP not only for Shopify orders but also for Shopify draft orders. The previous substitution-list approach of mapping payment terms to credit terms has been replaced with a clearer, more flexible mapping configuration directly in the store settings.

System Administration: License Compliance and Performance Monitoring

Different tiers of Acumatica ERP licenses have different recommended levels of resource consumption. This lets you purchase the license that fits your needs. In Acumatica ERP 2026 R1, you can view current and historical resource usage. It is now easier to check system status and identify the cause of high resource consumption. You can quickly see when the system reaches license limits and decide if you need to expand your license.

To facilitate performance monitoring, the new **Resource Monitoring** tab has been added to the [System Monitor](#) (SM201530) form.

Typical Use Cases

Wondering how this works in practice? This section walks you through common scenarios where the Resource Monitoring tab provides insights into system performance and resource consumption.

Use Case 1: Investigate Slow Requests

Suppose users have reported performance degradation at certain time periods. As a system administrator, you can use the **Resource Monitoring** tab to investigate the issue. In the **Last 30 Days** widget, you locate dates with excessive resource consumption. In the **Application Compute Units (ACU) Consumption** chart, you notice a time interval with high CPU consumption.

To find the cause, you drill down into the **Application Compute Units (ACU) Consumption** chart and see that several data-processing activities ran simultaneously, exceeding the system's resource capacity. You reschedule these activities to run during off-peak hours and start at a different time.

Use Case 2: Identify Proper License Tier

Suppose, as a system administrator, you need to verify how Acumatica ERP impacts applications in shared-resource environments. You can use the **Resource Monitoring** tab to investigate the customer's consumption trends over the last few months. In the **Last 30 Days** widget, you see that the system shows excessive resource consumption in the last few months.

To identify the cause, you navigate through days with high consumption, review performance metrics, and locate the exact resource that was overconsumed. Using this information, you can decide to upgrade to a higher license tier that allows greater resource usage.

Check Resource Usage

On the **Resource Monitoring** tab of the [System Monitor](#) (SM201530) form, you can easily see the current status of the system resource usage, as well as the resource usage for previous days.

In the **Last 30 Days** widget (Item 1 below), you can see the overall resource consumption for the last 30 days—including days with normal consumption and days with excessive consumption. You can select a date for which to display detailed resource consumption statistics.

In the **Consumption Status, <Selected_Date>** section (Item 2), you can see the summary of the following key resource parameters:

- Application compute units (ACU): The maximum consumption for the chosen date and the cumulative consumption for the last 30 days.
- Data compute units (DCU): The maximum consumption for the chosen date and the cumulative consumption for the last 30 days.
- Memory: Maximum consumption for the chosen date and average consumption for the last 30 days.
- Commercial transaction volume (CTV): Cumulative consumption for the last 30 days

- ERP transaction volume (ETV): Cumulative consumption for the last 30 days

The percentage metrics shown in the **Resource Monitoring** tab reflect how much of your recommended consumption you are using, based on your current license tier. You can view your recommended consumption on the **License and Constraints** tab of the [License Monitoring Console](#) (SM604000) form.

In the **Request Count** chart (Item 3), you can see the number of requests during the selected date.

The **Slow Request Count** chart (Item 4) shows the number of requests that took longer than 10 seconds to complete.

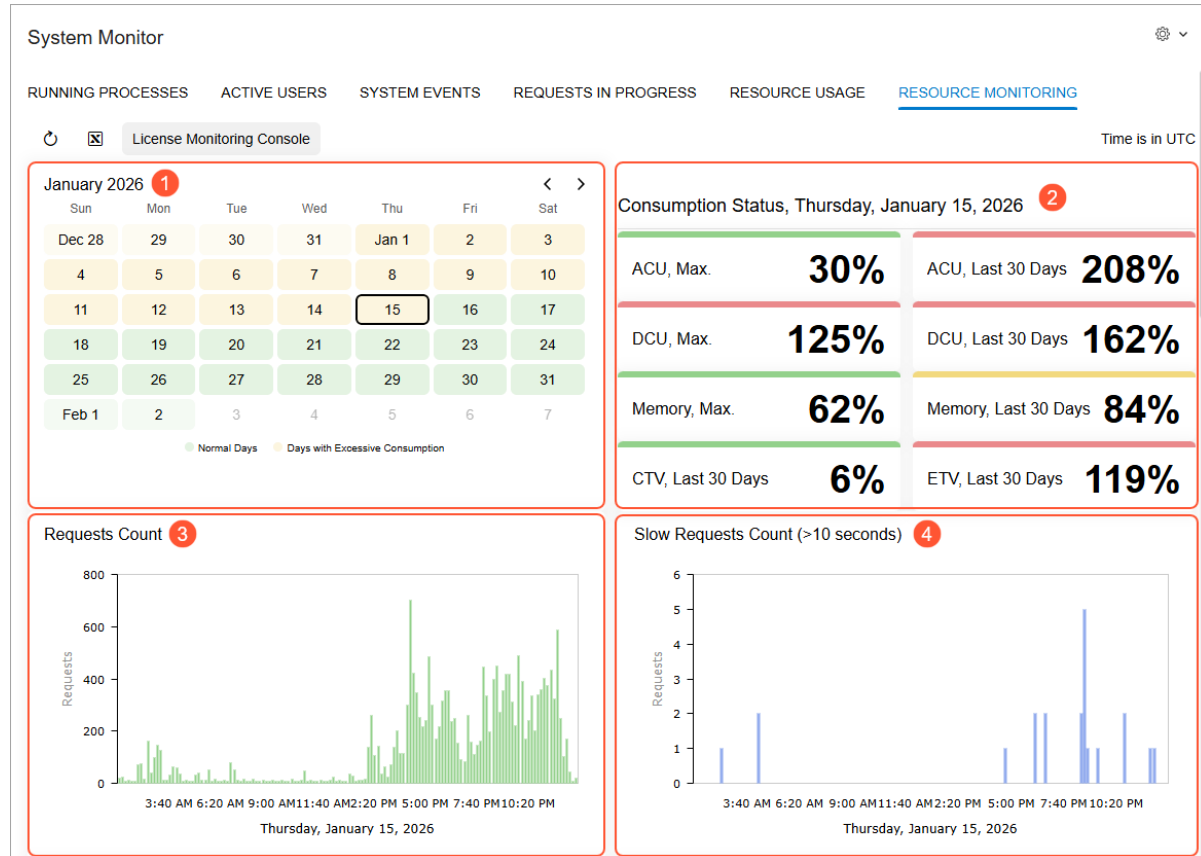


Figure: The Resource Monitoring tab

The **Application Compute Units (ACU) Consumption** chart (Item 1 below) displays the amount of computing time used to process resource requests and tasks during the selected date. The **Application Compute Units (ACU), Cumulative 30 Days** widget (Item 2) indicates the cumulative ACU consumption during the last 30 days.

You can click the chart to open it in a new window. There, you can view the metrics by tenant, by screen, request type, user, or see all measurements together. Clicking the **Application Compute Units (ACU), Cumulative 30 Days** widget opens a window with a daily consumption chart and a cumulative consumption trend line.

In the **Data Compute Units (DCU) Consumption** chart (Item 3), you can see the amount of time (both query processing time and query wait time) for SQL queries to execute during the selected date. The **Data Compute Units (DCU), Cumulative 30 Days** widget (Item 4) indicates the cumulative DCU consumption during the last 30 days.

You can click the chart to open it in a new window. There, you can view the metrics by tenant, by screen, request type, user, or see all measurements together. Clicking the **Data Compute Units (DCU), Cumulative 30 Days** widget opens a window with a daily consumption chart and a cumulative consumption trend line.

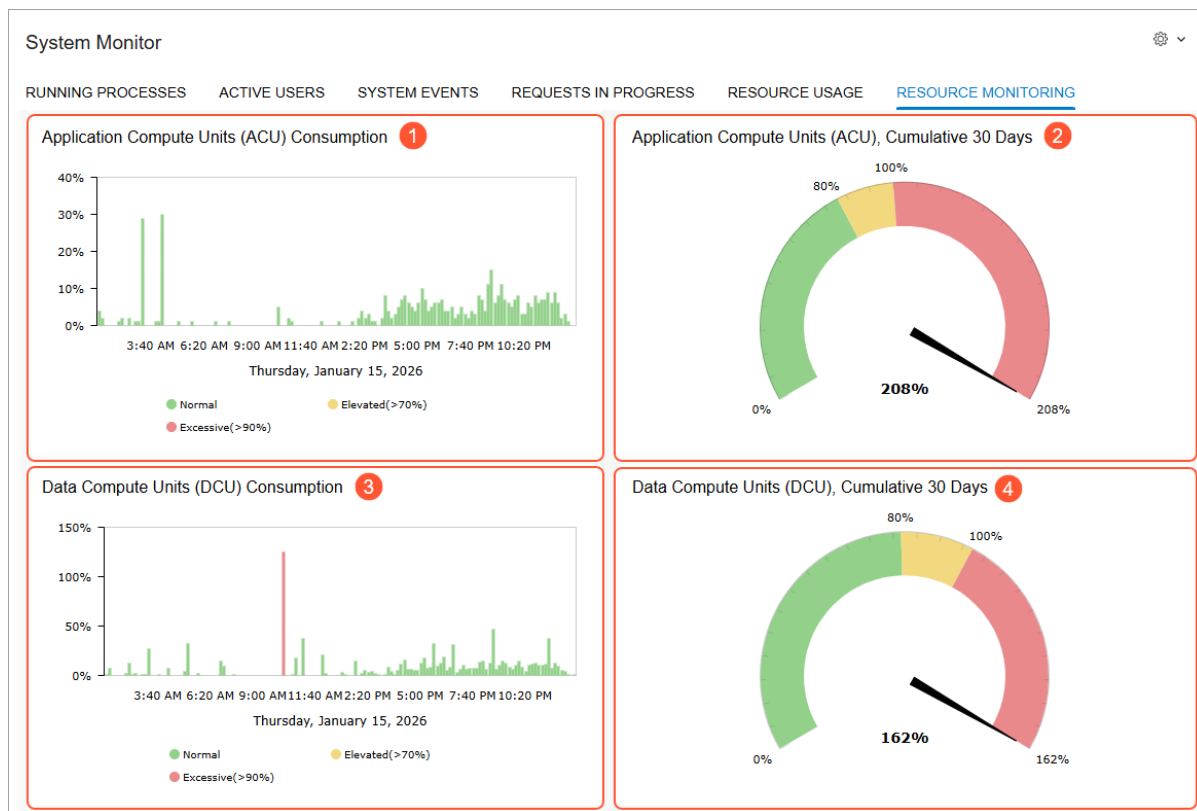


Figure: The Application Compute Units and Data Compute Units charts

In the **Memory Consumption** chart (Item 1 below), you can see the amount of memory consumed by the system during the selected date. The **Memory, Average 30 Days** widget (Item 2) indicates the system's average memory consumption for the last 30 days.

You can click the chart to open it in a new window. Clicking the **Memory, Average 30 Days** widget opens a window with a daily consumption chart and a cumulative consumption trend line.

The **API Request Count** chart (Item 3) displays the number of API requests performed during the selected date. You can click the chart to display it in a separate window. There, you can split the metrics by tenant, by screens, by users, or view the overall measurements.

The **CTV, Cumulative 30 Days** widget (Item 4) shows the cumulative highest volume of commercial transactions for the last 30 days.

The **ETV, Cumulative 30 Days** widget indicates the cumulative number of times Acumatica ERP objects were created or modified during the last 30 days.

Clicking these two widgets opens a window with a daily transactions chart and a cumulative transactions trend line.

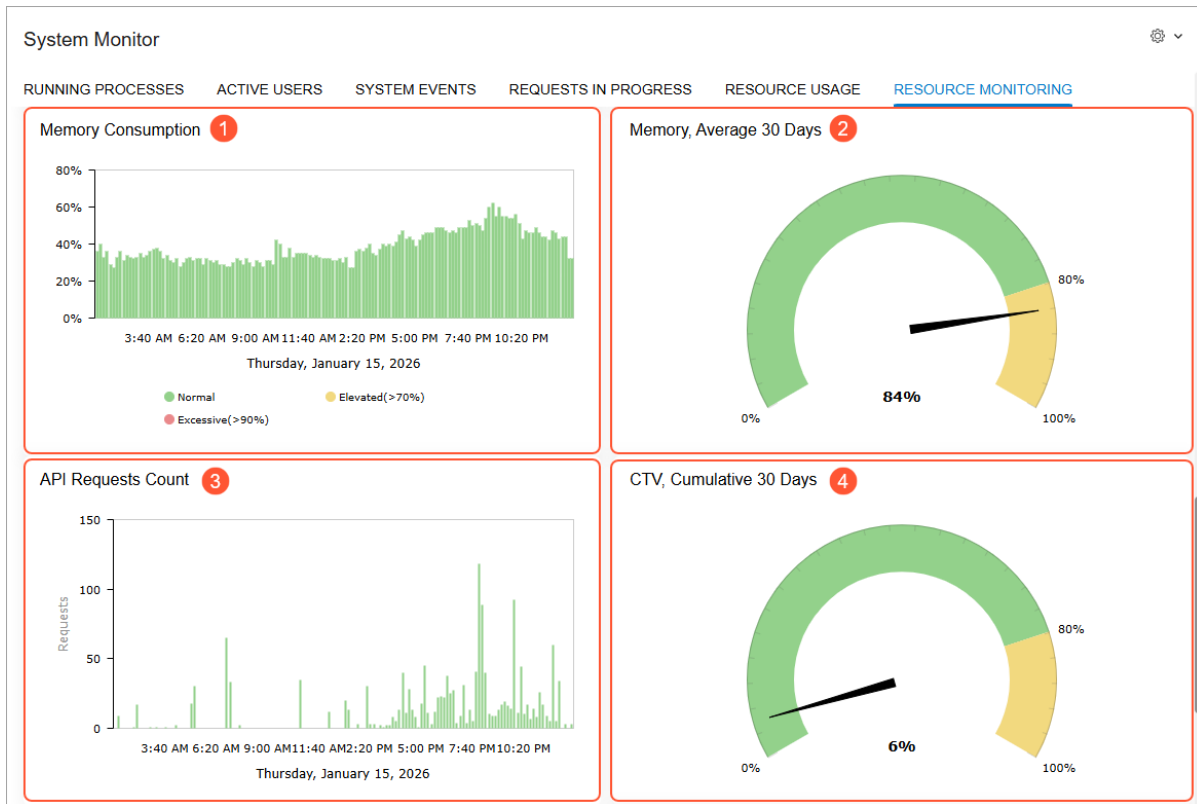


Figure: The Memory, API Request Count, and CTV charts

System Administration: Support for PostgreSQL

Starting in Acumatica ERP 2026 R1, the system can be installed and configured to work with PostgreSQL.



This version provides a preview of this functionality, which will be further enhanced in future releases. It is not yet recommended for production environments.

Testing of Acumatica ERP with PostgreSQL

You can now test Acumatica ERP with PostgreSQL to assess how PostgreSQL's performance, scalability, and tooling may benefit your environment. To prepare for testing, perform these steps:

1. Deploy a PostgreSQL server that's locally installed or running in a Docker container.

To start a PostgreSQL Docker container, use the following command.

```
podman run --name postgres
-e POSTGRES_PASSWORD=Postgres_Password
-p 5432:5432
-d postgres:18
```

2. Deploy an Acumatica ERP instance.

To start this process, launch the Acumatica ERP Configuration wizard. On the **Database Server Connection** page, select *PostgreSQL Server* in the **Server Type** box and enter the server credentials in the **SQL Server Authentication** section, as shown below.

Acumatica ERP Configuration Wizard

Database Server Connection

On this page, you configure the connection to the database server.

Specify the database server to be used. If the SQL server port is not the default 1433, it should be specified in the server name.

Server Type: PostgreSQL Server

Server Name: localhost

Specify the authentication method, and, if you choose SQL Server Authentication, the login and password of an account. The user must have appropriate rights for creating databases or making changes to them.*

Windows Authentication

SQL Server Authentication**

Login: postgres

Password: *****

* The user credentials are required during the configuration ONLY. The credentials are not stored or used later.

** The server should be configured to support this method.

Version: 26.093.0239
<https://www.acumatica.com>

[Back](#) [Next](#)

Figure: Specifying PostgreSQL connection settings

Alternatively, you can use the Acumatica ERP command-line tool to create and configure the database, as shown in the following example.

```
ac.exe -cm "DBMaint" -t "PgSql" -s "localhost"
-dbsrvuser "postgres" -dbsrvpass "Postgres_Password" -sw "False" -d "database name"
-i "AcumaticaERP" -ipath:"instance directory"
-c "ci=1;ct=;cp=;cd=;cv=False;cn=;" -c
  "ci=2;ct=SalesDemo;cp=1;cd=;cv=True;cn=Company;"
```

3. Modify the web.config file.

Open the web.config file for the site instance. This file is typically located at **%Program Files%\Acumatica ERP*<instance name>***, where *<instance name>* is the name of the application instance website.

Modify the connectionStrings section as follows.

```
<connectionStrings>
<remove name="ProjectX" />
<add name="ProjectX_PgSql" providerName="System.Data.SqlClient"
      connectionString="Host=localhost;Database=database name;User
      ID=postgres;Password=Postgres_Password;Integrated Security=False;" />
</connectionStrings>
```

Modify the providers section as follows.

```
<providers>
<add name="PXSqlDatabaseProvider" type="PX.Data.PXSqlDatabaseProvider, PX.Data"
      connectionStringName="ProjectX" companyID="" secureCompanyID="False" />
<add name="PXSqlDatabaseProvider" type="PX.PgSql.PgSqlDatabaseProvider, PX.PgSql"
      connectionStringName="ProjectX_PgSql" companyID="" secureCompanyID="false" />
</providers>
```

4. Save the web.config file. This automatically restarts the site instance.

Time and Expenses: Employee Utilization Visibility

Starting in Acumatica ERP 2026 R1, you can use the [Employee Utilization](#) (EP408000) inquiry form to view how employee time is allocated across project and non-project activities. This visibility helps you understand how the available labor capacity is used across billable and non-billable activities, supporting better resource planning and workload balancing.



This inquiry is available only if either the *Time Management* or *Advanced Financials* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Key Benefits

With the [Employee Utilization](#) (EP408000) inquiry form, you can:

- **Allocate resources more effectively** by identifying underutilized or overloaded employees.
- **Increase profitability** by monitoring how much of employees' available time is billable.
- **Support accurate forecasting and capacity planning** by analyzing utilization trends over time.
- **Improve project visibility** by reviewing detailed breakdowns of billable and non-billable activities.

Exploring Employee Utilization

On the [Employee Utilization](#) (EP408000) form, you can view metrics that show how employees allocate their time between project and non-project work, as well as across billable and non-billable activities. The metrics are calculated based on employees' released time activities within the specified period.

In the **Show Employees** box, you can select how the system displays and calculates data—either for employees who've created at least one time activity or for all employees.

Employee	Position	Supervisor	Organization	Branch	Total Logged Hours	Total Available Hours	Project Billable Hours	Project Utilization (%)	Total Billable Hours	Total Utilization (%)	Project Non-Billable Hours	Total Non-Billable Hours	Total Holiday Hours	Total Billable Holiday Hours	Total Vacation Hours	Total Billable Vacation Hours
> Marcos Garcia			SweetLife Fr...	HEADOFFICE	16.00	1,760.00	0.00	0.00	16.00	0.91	0.00	0.00	0.00	0.00	0.00	0.00
David Chubb			SweetLife Fr...	HEADOFFICE	16.00	1,760.00	12.00	0.68	16.00	0.91	0.00	0.00	0.00	0.00	0.00	0.00
Bill Owen			SweetLife Fr...	HEADOFFICE	16.00	1,760.00	0.00	0.00	0.00	0.00	0.00	16.00	0.00	0.00	16.00	0.00

Figure: The *Employee Utilization* inquiry form

The following metrics show the total number of hours logged by employees for project and non-project activities:

- **Total Logged Hours**
- **Project Billable Hours**
- **Total Billable Hours**
- **Project Non-Billable Hours**
- **Total Non-Billable Hours**

The following utilization metrics are calculated by using **Total Available Hours**, which represents the total number of working hours the employee is available to work, based on the employee's work calendar:

- **Project Utilization (%)**: The percentage of an employee's total available working hours spent on billable project work. It's calculated as follows.

$$\text{Project Billable Hours} / \text{Total Available Hours} \times 100$$

- **Total Utilization (%)**: The percentage of an employee's total available working hours spent on billable work. It's calculated by using the following formula.

$$\text{Total Billable Hours} / \text{Total Available Hours} \times 100$$

The remaining metrics show the total number of hours the employees spent on non-working activities:

- **Total Holiday Hours**
- **Total Billable Holiday Hours**
- **Total Vacation Hours**
- **Total Billable Vacation Hours**

Access Rights

The following user roles have the listed access rights to this inquiry form:

- *Administrator: Delete*
- *Acumatica Support: Delete*
- *PR Admin: View Only*
- *PR Manager: View Only*
- *PM Operations Manager: View Only*
- *PM Financial Controller: View Only*

Time and Expenses: Flexible Time Card Periods

In Acumatica ERP 2026 R1, flexible time card periods give you greater control over how employees report time across your organization. You can now align time cards with **weekly, biweekly, semi-monthly, or monthly** payroll cycles—and even assign different frequencies to different employees.



This capability is available only if the **Custom Week Configuration** check box is cleared on the [Time and Expenses Preferences](#) (EP101000) form. If the check box is selected, the system can generate time cards with only the custom weekly frequency.

Time Cards That Match Your Payroll Cycles

- Flexible time card periods that match your payroll processes
- Per-employee frequency settings
- Improved consistency between time card and time activity frequencies

Improved Organization of Time and Expense Settings

You can now find the settings on the [Time and Expenses Preferences](#) (EP101000) form more easily due to their improved organization.

The **General** tab includes the sections shown below.

The screenshot shows the 'Time & Expenses Preferences' form with the 'GENERAL' tab selected. The form is organized into several sections:

- Numbering Sequences:**
 - Expense Claim Numbering Sequence *
 - Expense Receipt Numbering Sequence *
 - Time Card Numbering Sequence *
 - Equipment Time Card Numbering Sequence *
- Approvals:**
 - Expense Receipt Approval Map
 - Expense Claim Approval Map
 - Time Card Approval Map
 - Equipment Time Card Approval Map
- Pending Approval Notification Templates:**
 - Expense Receipt Notification
 - Expense Claim Notification
 - Time Card Notification
 - Equipment Time Card Notification
- Note and File Handling:**
 - Copy Notes to AR Documents
 - Copy Files to AR Documents
 - Copy Notes to AP Documents
 - Copy Files to AP Documents
 - Copy Notes to PM Documents
 - Copy Files to PM Documents
- Posting:**
 - Automatically Release AR Documents
 - Automatically Release AP Documents
 - Automatically Release PM Documents

Figure: The General tab

The **Expenses** tab, which has only one section, appears when the *Expense Management* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

The screenshot displays the 'Time & Expenses Preferences' window with the 'EXPENSES' tab selected. The 'Expense Claims' section contains the following fields and options:

- Combine Sales Sub. From ***: Text input field containing 'EEEEEEEEEE'.
- Combine Billable Expense Sub. From ***: Text input field containing 'EEEEEEEEEE'.
- Combine Non-Billable Expense Sub. From ***: Text input field containing 'EEEEEEEEEE'.
- Non-Taxable Tip Item**: Searchable text input field.
- Use Receipt Accounts for Tips**
- Hold Expense Claims on Entry**
- Post Summarized Company Expenses by C...**
- Require Ref. Nbr. in Expense Receipts**
- Allow Mixed Tax Settings in Claims**

Figure: The Expenses tab

The **Time Reporting** tab includes the sections shown below.

Time & Expenses Preferences ⚙️

📄 ↶ ⬆️

GENERAL **EXPENSES** **TIME REPORTING**

Time Activities

Require Time On Activity

Default Time Activity Type * 🔍

Min Billable Time ▼

Regular Hours Earning Type * 🔍

Holiday Earning Type * 🔍

Vacations Earning Type * 🔍

Default Time Log Type 🔍

Time Posting Settings

Project Time ▼

Off-Balance Account Group

Time Cards

Custom Week Configuration

Default Frequency ▼

First Day of Week ▼

Biweekly Period Start Day ▼

Start Day of 1st Semimonthly Period ▼

Start Day of 2nd Semimonthly Period ▼

Start Day of Monthly Period ▼

Figure: The Time Reporting tab

Setting Up the Time Card Frequency

To support the creation of time cards with different frequencies, a system administrator specifies the following settings in the **Time Cards** section of the **Time Reporting** tab:

- **Default Frequency:** *Monthly, Semi-monthly, Biweekly, or Weekly*
- **First Day of Week:** The day of the week
- **Biweekly Period Start Day:** The day of the week
- **Start Day of 1st Semimonthly Period:** The day of the month
- **Start Day of 2nd Semimonthly Period:** The day of the month



The difference between the start days of the first and second semi-monthly periods must be more than 10 days and less than 20 days.

- **Start Day of Monthly Period:** Any day of the month

The frequency settings, which can be changed at any time, apply to entities created after the changes are saved as follows:

- Default frequency: Applies to new employees
- Start date of time card periods: Applies to time cards and activities

Managing Employee Time Card Frequency

By default, the system populates the frequency settings for new employees by using the settings on the [Time and Expenses Preferences](#) (EP101000) form. If your company uses different payroll periods for different employees, you can assign a time card frequency to each individual employee on the [Employees](#) (EP203000) form. This frequency applies to time activities and time cards created for this employee.

The screenshot shows the 'Employees' form for Kimberly Gibbs (Employee ID: EP00000026). The 'Employee Class' is 'EMPHOURLY - Em...'. Under 'Employee Settings', the 'Branch' is 'HEADOFFICE - Sw...', 'Department' is 'OPERATIONS - Op...', and 'Calendar' is 'MAIN - Main Calendar'. The 'Additional Settings' section shows 'Regular Hours Validat...' and 'Time Card Frequency' (highlighted with a red box) set to 'Biweekly'. Other options include 'Monthly', 'Semi-monthly', 'Weekly', and 'Staff Member in Servic...'.

Figure: The employee’s time card frequency

When you create a time card for an employee, select a period in the **Period** box of the *Employee Time Cards* (EP305000) form. The list of available periods corresponds to the frequency that is selected for the employee on the *Employees* form. This frequency is also displayed in the **Frequency** box of the *Employee Time Cards* form, as shown below.


The screenshot shows the 'Employee Time Cards' form for Maxwell Baker (Ref. Nbr. TC002372). The 'Employee' is 'Maxwell Baker', 'Period' is '2025-22 (05/25 - 05/31)', and 'Frequency' (highlighted with a red box) is 'Weekly'. The 'Status' is 'Released' and 'Type' is 'Normal'. A 'Total' summary shows 'Time Spent' as 45:00 and 'Billable' as 00:00. The 'SUMMARY' tab is active, showing a table with columns for Earning Type, Task ID, Project, Project Task, Labor Item, and days of the week (Sun-Sat).

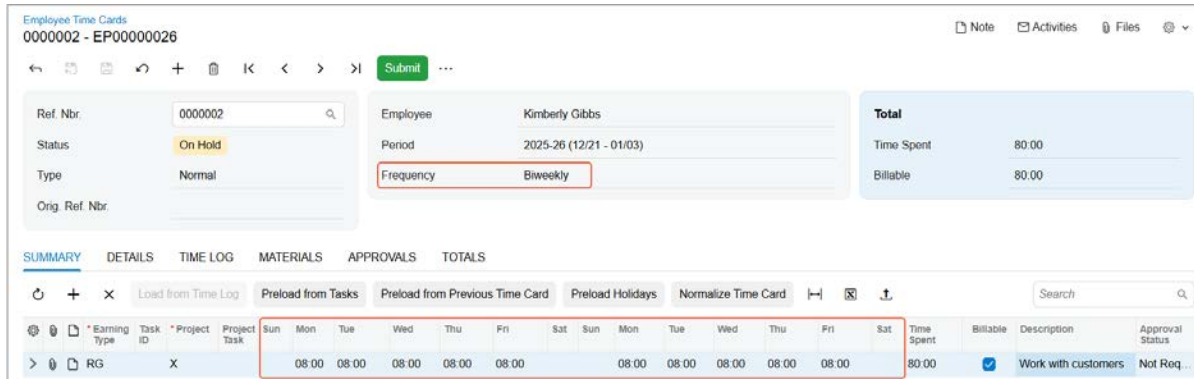
Earning Type	Task ID	Project	Project Task	Labor Item	Sun	Mon	Tue	Wed	Thu	Fri	Sat
RG	X			LABORPM		09:00	09:00	09:00	09:00	09:00	

Figure: The time card frequency

On the **Summary** tab of the *Employee Time Cards* form, the number of columns showing days depends on the following:

- The employee time card frequency. In the example below, the *Biweekly* frequency is selected, so the time card has 14 day columns.
- The frequency settings specified on the *Time and Expenses Preferences* (EP101000) form.

 The day columns follow the natural order of days in the period, from left to right.

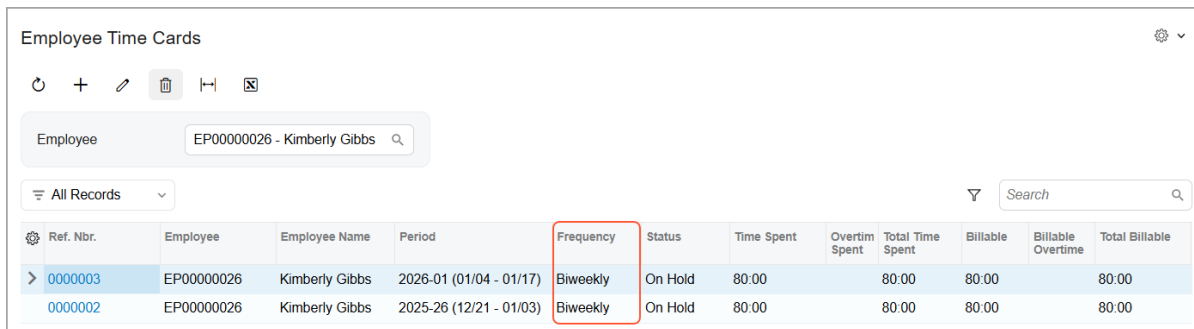


Ref. Nbr.	Employee	Period	Frequency	Total Time Spent	Total Billable
0000002	Kimberly Gibbs	2025-26 (12/21 - 01/03)	Biweekly	80.00	80.00

Day	Time Spent	Billable	Description	Approval Status
Sun	08:00			
Mon	08:00			
Tue	08:00			
Wed	08:00			
Thu	08:00			
Fri	08:00			
Sat	08:00			
Sun	08:00			
Mon	08:00			
Tue	08:00			
Wed	08:00			
Thu	08:00			
Fri	08:00			
Sat	08:00			
Total	80.00	<input checked="" type="checkbox"/>	Work with customers	Not Req.

Figure: Day columns for biweekly time card frequency

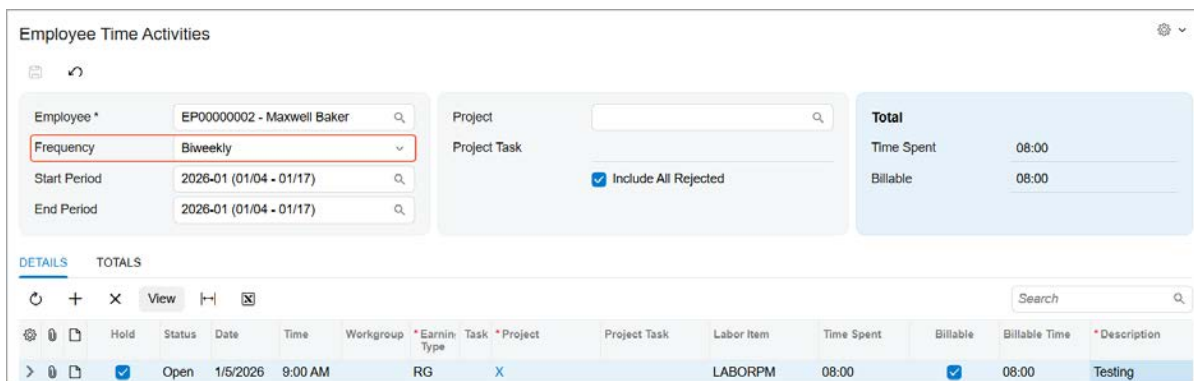
You can also view the time card frequency on the *Employee Time Cards* (EP406000) and *Release Time Cards* (EP505010) forms.



Ref. Nbr.	Employee	Employee Name	Period	Frequency	Status	Time Spent	Overtime Spent	Total Time Spent	Billable	Billable Overtime	Total Billable
0000003	EP00000026	Kimberly Gibbs	2026-01 (01/04 - 01/17)	Biweekly	On Hold	80:00		80:00	80:00		80:00
0000002	EP00000026	Kimberly Gibbs	2025-26 (12/21 - 01/03)	Biweekly	On Hold	80:00		80:00	80:00		80:00

Figure: The Frequency column

When you create a time activity on the *Employee Time Activities* (EP307000) form, the frequency specified in the employee’s settings is inserted by default; you can change it for this activity. An employee time card shows an existing time activity only if the time activity frequency matches the time card frequency.



Hold	Status	Date	Time	Workgroup	Earning Type	Task	Project	Project Task	Labor Item	Time Spent	Billable	Billable Time	Description
<input checked="" type="checkbox"/>	Open	1/5/2026	9:00 AM	RG	X				LABORPM	08:00	<input checked="" type="checkbox"/>	08:00	Testing

Figure: The frequency of employee time activities

You can create a time activity on the [Weekly Crew Time Entry](#) (EP307100) form only for employees with the weekly time card frequency.

When you use the Acumatica mobile app, you can see the time card frequency on the *Employee Time Cards* screen and in the corresponding list of records.

Approving Summaries of Time Activities with Different Frequencies

When you narrow the list of time activity summaries on the [Approve Time Activity Summaries](#) (EP507030) form by date range, a time activity summary appears if at least one day in its date range matches the specified date range on the form, regardless of its frequency. For time cards with a frequency other than weekly, only the total time spent is calculated, as shown below.

The screenshot shows the 'Approve Time Activity Summaries' form. At the top, there are buttons for 'Approve All' and 'Reject All'. Below are search filters for Approver, Start Date, End Date, Project, Project Task, and Employee. A 'Total' box shows 'Time Spent' as 40:00. The main table has two tabs: 'SUMMARY' and 'TOTALS'. The table columns are: Approve, Reject, Employee, Period, Frequency, Earnin Type, Task ID, Project, Project Task, Time Spent, Billable, Description, and Time Card. The 'Time Spent' column for the first row is highlighted with a red box and contains the value '40:00'.

Approve	Reject	Employee	Period	Frequency	Earnin Type	Task ID	Project	Project Task	Time Spent	Billable	Description	Time Card
<input type="checkbox"/>	<input type="checkbox"/>	Layla Beauvoir	2026-02 (01/11 - 01/17)	Weekly	RG		REVREC01	01TASK1	40:00	<input type="checkbox"/>	Normalization	TC002387

Figure: The Time Spent column

Upgrade Notes

When Acumatica ERP is upgraded to 2026 R1, the system handles existing settings as follows:

- The **First Day of Week** box on the [Time and Expenses Preferences](#) (EP101000) form: If an option was specified before the upgrade, it is preserved. If the box was empty, the system inserts *Sunday*.
- The **Custom Week Configuration** check box on the [Time and Expenses Preferences](#) form: The previous state of the check box is preserved.
- The **Time Card Frequency** box on the [Employees](#) (EP203000) form: For all existing employees, the system inserts *Weekly*.
- The **Frequency** box on the [Employee Time Cards](#) (EP305000): For all existing time cards, the system inserts *Weekly*.
- The **Start Date** and **End Date** boxes on the [Employee Time Cards](#) form: For all time cards with custom weeks, the start and end dates match the first and last day of the corresponding custom week. For all other time cards, the system calculates the dates by using the settings on the [Time and Expenses Preferences](#) form.
- The **Frequency** box on the [Employee Time Activities](#) (EP307000) form: For all existing time activities, the system inserts *Weekly*.

Time and Expenses: Mobile Time Tracking for Project Tasks

Time tracking for project tasks was introduced in Acumatica ERP 2025R2. Starting in Acumatica ERP 2026 R1, this functionality is also available in the Acumatica mobile app, making it easier to track time while working in the field. You can now track time for project tasks, manage time logs, and create time activities from time logs in daily field reports or time cards directly from your mobile device.



This functionality is available only if the *Clock In and Clock Out* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Tracking Time in the Mobile App

You can start tracking time for a project task by tapping the clock icon in the navigation bar of the main menu of the Acumatica mobile app.

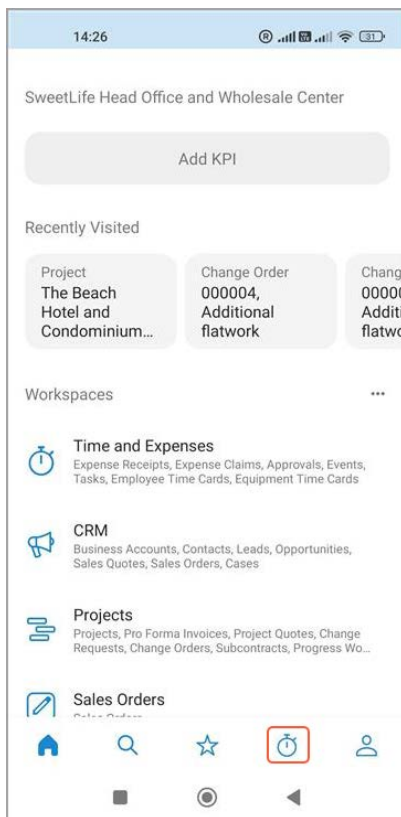


Figure: The timer icon

On the *Time Log* screen, tap Plus. On the *Project Tasks* screen, select the needed project task. To find a project task quickly, you can use the search or sort options.

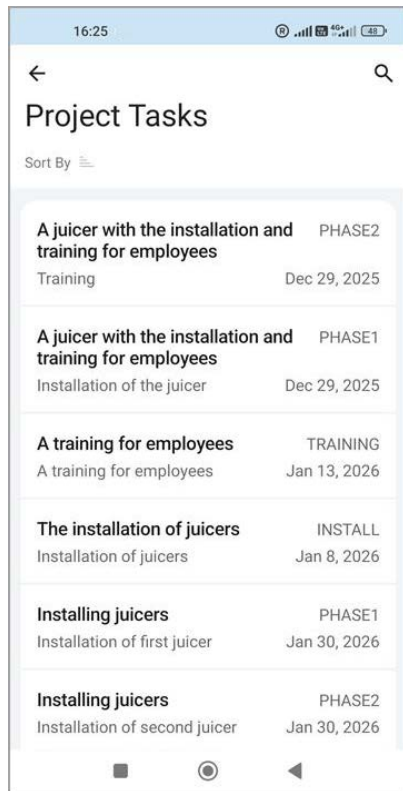


Figure: The Project Tasks screen

The list of project tasks includes only those that meet all of the following conditions:

- The **Time Entries** check box is selected on the **Summary** tab of both the [Project Tasks](#) (PM302000) form for the project task and the [Projects](#) (PM301000) form for the corresponding project.
- The status of both the project and its project task is *Active*.
- If the **Restrict Employees** check box is selected for the project, an employee who's tracking time is added on the **Employees** tab of the [Projects](#) form.

When you tap a project task, the *Time Log* screen opens and the timer starts running.

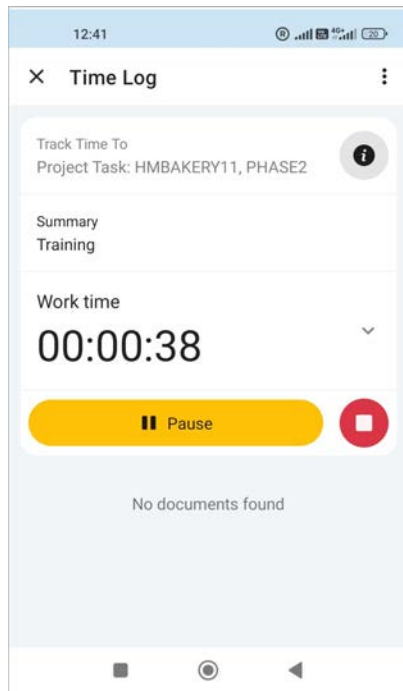


Figure: The running timer

You can pause the timer and either resume it or select another project task by clicking Plus.

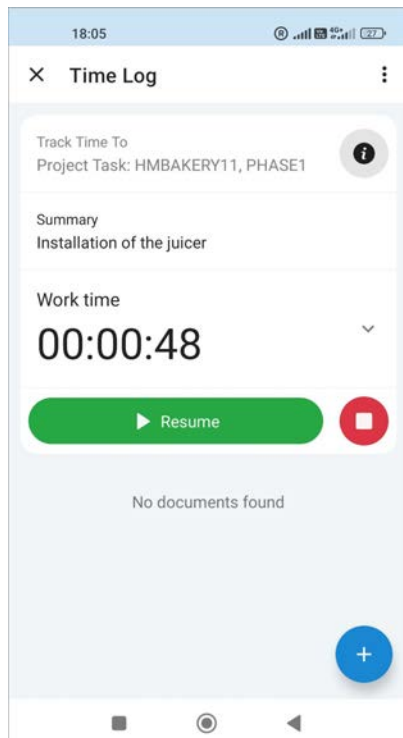



Figure: The paused timer

When you stop tracking time for a project task, the timer closes, and you return to the *Time Log* screen, where you can start tracking time again.

Managing Time Logs

When the timer is running or paused on the *Time Log* screen, you can change the time type by tapping the arrow to the right of the time counter. The time log is recorded using the most recently selected time type.

To manage time logs, tap the info icon () to open the *Time Logs* screen. From there, you can:

- View existing time logs for the project task
- Add a time log by tapping the Plus button
- Delete time logs
- Edit any time log's data (except the record ID) by tapping the time log



Figure: The Time Logs screen

Viewing Daily Labor Activities

Version 2026 R1 gives you enhanced visibility into daily labor activities on any project. You can see employee time logs for a selected day on the **Time Log** tab of the *Daily Field Report* (PJ304000) form.

Daily Field Report
 DFR-000001 - A juicer with the installation and training for employees

DFR ID * DFR-000001 Site Address 4056 Taylor Street, Staten Isl
 DFR Date * 1/16/2026 City New York
 Project * HMBAKERY11 - A juicer... Postal Code 10310 View on Map

LABOR TIME AND ACTIVITIES **TIME LOG** PROGRESS WORKSHEETS CHANGE REQUESTS CHANGE ORDERS SUBCONTRACTORS

Type	Time Spent	Description	Start Date	Start Time	End Date	End Time	Record Type	Record ID
Work time	01:49	Installation of the juicer	1/16/2026	9:04 AM	1/16/2026	10:53 AM	Project Task	HMBAKERY11, PHASE1
Work time	01:45	Installation of the juicer	1/16/2026	10:55 AM	1/16/2026	12:40 PM	Project Task	HMBAKERY11, PHASE1
Work time	00:30	Training	1/16/2026	12:41 PM	1/16/2026	1:11 PM	Project Task	HMBAKERY11, PHASE2
Work time	01:00	Installation of the juicer	1/16/2026	2:36 PM	1/16/2026	3:36 PM	Project Task	HMBAKERY11, PHASE1
Work time	00:30	Training	1/16/2026	4:39 PM	1/16/2026	5:09 PM	Project Task	HMBAKERY11, PHASE2
Work time	01:17	Installation of the juicer	1/16/2026	6:03 PM	1/16/2026	7:20 PM	Project Task	HMBAKERY11, PHASE1
> Travel time	00:30	Training	1/16/2026	6:42 PM	1/16/2026	7:12 PM	Project Task	HMBAKERY11, PHASE2
Work time	00:08	Installation of the juicer	1/16/2026	7:43 PM	1/16/2026	7:50 PM	Project Task	HMBAKERY11, PHASE1

Figure: The Time Log tab on the Daily Field Report form

In the Acumatica mobile app, time logs are displayed on the same tab of the following screens:

- Daily Field Report
- Time Card

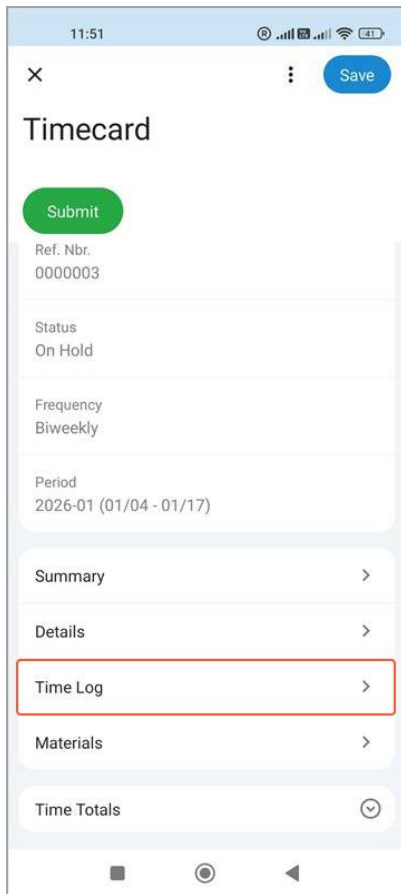


Figure: The Time Log tab in the mobile app

The system displays time logs of all employees whose time log date range includes one of these:

- The selected **DFR Date** in a daily field report
- The selected period in a time card

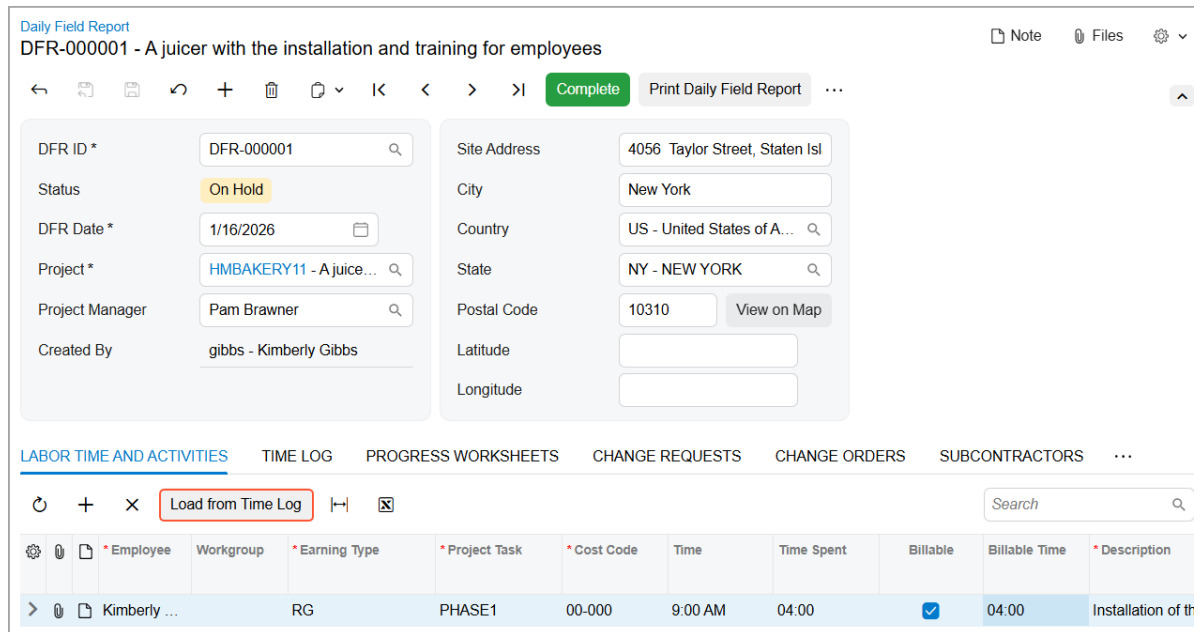
Creating Time Activities from Time Logs

You can create time activities from time logs by clicking **Load from Time Log** on the [Daily Field Report](#) (PJ304000) form or the following mobile app screens:

- *Daily Field Report*
- *Timecard*

The **Load from Time Log** button is available if both of the following conditions are met:

- At least one time log exists on the **Time Log** tab.
- The status of the daily field report or time card is *On Hold*.



Daily Field Report
DFR-000001 - A juicer with the installation and training for employees

DFR ID * DFR-000001
Status On Hold
DFR Date * 1/16/2026
Project * HMBAKERY11 - A juicer...
Project Manager Pam Brawner
Created By gibbs - Kimberly Gibbs

Site Address 4056 Taylor Street, Staten Isl
City New York
Country US - United States of A...
State NY - NEW YORK
Postal Code 10310
View on Map
Latitude
Longitude

LABOR TIME AND ACTIVITIES TIME LOG PROGRESS WORKSHEETS CHANGE REQUESTS CHANGE ORDERS SUBCONTRACTORS

Load from Time Log

Employee	Workgroup	Earning Type	Project Task	Cost Code	Time	Time Spent	Billable	Billable Time	Description
Kimberly ...	RG	PHASE1	00-000	9:00 AM	04:00	<input checked="" type="checkbox"/>	04:00	Installation of th	

Figure: The Load from Time Log button

When you click **Load from Time Log**, the system creates time activities for only the unrecorded portion of a time log that belongs to the **DFR Date** of the daily field report or the time card period. After the time activity is created, the corresponding time log becomes read-only.



Time activities are created only if an earning type is selected for the time log types on the [Time Log Types](#) (EP209000) form.

Example: Suppose that a time log for a particular project task starts at 8:00 PM on January 20 and ends at 1:00 AM on January 21. When you click **Load from Time Log** in the daily field report for January 20, the system does the following:

- Creates a time activity for four hours on January 20
- Makes the time log read-only

When you click **Load from Time Log** in the daily field report for January 21, the system creates a time activity for the remaining one hour if no time activity has already been created from this time log.

Key Tips for Cost Codes

For the smoothest time tracking experience, keep the *Cost Codes* feature disabled on the [Enable/Disable Features](#) (CS100000) form.

To minimize manual selection, make sure a default cost code is specified in advance. The default cost code can be defined in either of the following places:

- On the [Non-Stock Items](#) (IN202000) form for the employee's labor item
- On the [Project Tasks](#) (PM302000) form for the project task

These settings help ensure that time is recorded correctly and applied to project costs automatically.

Access Rights

The following user roles have the listed access rights to the *Time Logs* and *Time Log* screens of the Acumatica mobile app:

- *Administrator, Acumatica Support, and Internal Employee: Delete*
- *PM Viewer: View Only*

Learn More

See these topics for more information:

- [*Employee Time Entry: Creation of Time Activities from Project Time Logs*](#)
- [*Project Tasks: Tracking Time with the Timer*](#)
- [*The Acumatica ERP UI: Top Pane*](#)

Customization: Updating Customization Projects for the Modern UI

In previous releases of Acumatica ERP, you could convert a form to the Modern UI by using the [Form Converter](#). However, this converter had the following limitations:

- It only converted custom forms. It couldn't convert customized versions of original Acumatica forms.
- You could only convert a single form at a time.
- The Modern UI files generated from the conversion had to be manually included in your customization project.

Acumatica ERP 2026 R1 introduces the **Customization Project Converter**. You can use it for **single-click** conversion of a customization project that contains custom forms or customized versions of original Acumatica ERP forms to the Modern UI. Alternatively, you can use the converter to individually convert specific forms within the project instead of converting all the forms in the customization project at once.

Regardless of the approach you choose, the converter does the following for each customized form:

- Generates the Modern UI version of the original form and the Modern UI version of the customized form—and then compares them to find the differences
- Creates extension files for the original form in the Modern UI that include the difference, such as added fields or modified table properties
- Adds the extension files to the [Modern UI Files](#) page of the Customization Project Editor

For each custom form, the converter does the following:

- Generates the Modern UI version of the custom form by converting its ASPX code to TypeScript and HTML
- Adds the generated TypeScript and HTML source files to the [Modern UI Files](#) page of the Customization Project Editor



The use of the customization project converter doesn't guarantee a perfect conversion of the forms in your customization project to the Modern UI. The converter provides **a baseline conversion that you should further fine-tune** based on your specific requirements. We strongly recommend that you:

- **Make necessary backups** first and use the converter **only in your development environment**.
- **Always review the files** generated by the converter and **make any required corrections**.
- Publish the converted forms to your production environment **only after fully testing** their functionality in your development environment.

Prerequisites for Using the Customization Project Converter

Before you use the converter, make sure the following requirements are met:

- The Modern UI has been enabled and set as the default UI in your instance. For details, see [Modern UI Development: General Information](#).
- The customization project you want to convert has already been published.
- The *Customizer* role has been assigned to your user account.



You must have this role to run the converter on a customization project or on a specific form within the project.

- All Acumatica ERP features related to the form have been enabled before the conversion. This gives you the converted version that's the most similar to the original version.



The converter ignores any JavaScript code in ASPX files or the code in the ASPX.CS files.

Running the Customization Project Converter on a Customization Project

To run the converter on an entire customization project:

1. Open the [Customization Projects](#) (SM204505) form and select the unlabeled check box in the row for the customization project you want to convert to the Modern UI.
2. On the form toolbar, click **Convert to Modern UI**.

The system displays a notification indicating that the conversion has started and updates it when the conversion has completed.

As part of the conversion, the converter generates the following extension files for each customized form that it converted to the Modern UI:

- `[SCREENID]_[CUSTOMIZATION_PROJECT_NAME]_converted.ts`, which contains the differences in TypeScript code between the original and customized versions of the form
- `[SCREENID]_[CUSTOMIZATION_PROJECT_NAME]_converted.html`, which contains the differences in HTML code between the original and customized versions of the form

When you publish the customization project, these files are saved in the `FrontendSources\screen\src\customizationScreens\[TENANT_NAME]\screens\[FIRST_TWO_LETTERS_OF_SCREENID\[SCREENID]\extensions` folder of your instance.

The converter generates the following source files for each custom form that it converted to the Modern UI:

- `[SCREENID].ts`, which contains the initialization of views for the form
- `[SCREENID].html`, which contains the HTML layout of the form

When you publish the customization project, these files are saved in the `FrontendSources\screen\src\customizationScreens\[TENANT_NAME]\screens\[FIRST_TWO_LETTERS_OF_SCREENID\[SCREENID]` folder of your instance.

3. Open the converted customization project in the Customization Project Editor and click **Modern UI Files** in the navigation pane. The [Modern UI Files](#) page opens. Here you'll find a list of the TypeScript and HTML files for all the forms that were converted to the Modern UI.
4. Review the generated TypeScript and HTML files and make any needed corrections. For example, for a custom form that was converted, you may need to correct the IDs of some tags in the HTML code so that they follow established naming conventions. For details, see [UI Component Guide](#).

You can make changes to the generated files on the [Modern UI Files](#) page or export the files to the `development` folder (by clicking **Export to Development Folder** on the page toolbar) and edit them in an external editor. For details about using the `development` folder, see [Modern UI Development: Creating Modern UI Source Files for Custom and Customized Forms](#).

5. If you used the `development` folder to modify the generated files, you need to update these files in the customization project. You do this by clicking **Detect Modified Files** on the [Modern UI Files](#) page.
6. Publish the customization project and open the forms in your instance to verify that they were converted correctly.

Running the Customization Project Converter on a Specific Customized Form

To run the customization converter on a specific customized form within a customization project:

1. On the [Customization Projects](#) (SM204505) form, open the customization project in the Customization Project Editor.

2. On the [Screens](#) page, click the row for the form that you want to convert to the Modern UI and click **Convert to Modern UI** on the page toolbar.

The system displays a notification indicating that the conversion has started.

When the conversion has completed, the system goes to the [Modern UI Files](#) page, which displays the extension files that were generated for the converted form:

- `[SCREENID]_[CUSTOMIZATION_PROJECT_NAME]_converted.ts`, which contains the difference in the TypeScript code of the original and customized versions of the form
- `[SCREENID]_[CUSTOMIZATION_PROJECT_NAME]_converted.html`, which contains the difference in the HTML code of the original and customized versions of the form

For example, if the customized form that you converted was the [Stock Items](#) (IN202500) form and the name of your customization project was *PhoneRepairShop*, the extension files generated from the conversion operation would be named as follows:

- `IN202500_PhoneRepairShop_converted.ts`
- `IN202500_PhoneRepairShop_converted.html`

After you published the customization project, the converter would save these files in the `FrontendSources\screen\src\customizationScreens\[TENANT_NAME]\screens\IN\IN202500\extensions` folder of your instance.

3. Review the generated TypeScript and HTML extension files and make any needed corrections. For example, suppose that your customization of the form adds a UI element to an existing section of a form. In the HTML code, you may need to correct the ID of a `qp-fieldset` tag so that it matches the ID specified for this tag in the form's original HTML code.

You can make changes to the generated files on the [Modern UI Files](#) page. Alternatively, you can export the files to the `development` folder by clicking **Export to Development Folder** on the page toolbar; you then edit the files in an external editor. For details about using the `development` folder, see [Modern UI Development: Creating Modern UI Source Files for Custom and Customized Forms](#).

4. Optional: If you've edited the generated files in the `development` folder, update these files in the customization project. To do this, click **Detect Modified Files** on the [Modern UI Files](#) page.
5. Publish the customization project and open the form in your instance to verify that it was converted correctly.

Learn More

For more information about updating customization projects for the Modern UI, see the topics in the [Updating Customization Projects for the Modern UI](#) chapter.

Developer Documentation: New and Updated Topics

Based on feedback from our developer community, we've refreshed the developer documentation for Acumatica ERP 2026 R1 with updated content and new topics to better support your work.

Configure the SignalR Hub

Suppose that you want your external application to receive push notifications from Acumatica ERP, but you can't publish a webhook for security reasons. In this case, you can configure the system to send notifications to the SignalR hub, from which any connected application can receive them.

In this release, we've refreshed the information on how to connect an external application to the SignalR hub. Check it out in [Push Notifications: To Connect to the SignalR Hub](#).

Create a Sales Invoice from a Sales Order with the REST API

By using the REST API, you can create a sales invoice from a sales order. To include an item from a sales order line in a sales invoice, you need to specify `OrderType`, `OrderNbr`, and `OrderLineNbr` for the corresponding detail line of the sales invoice. See a new detailed example in [Create a Sales Invoice from a Sales Order](#).

Use IGraphLongOperationManager for Asynchronous Operations

We recommend that you use the `IGraphLongOperationManager` interface when you need to execute an operation asynchronously from within a graph or graph extension. You don't need to implement the interface in your graph because it's already injected into `PXGraph` as a dependency injection service out of the box. See details on the implementation of asynchronous operations in the updated [Asynchronous Operations: General Information](#) topic.

Override the PXProjectionAttribute of an Existing DAC

You override the `PXProjection` attribute of an existing DAC when you need a DAC to behave as if it were declared with a different projection query—without modifying the original projection query of the DAC. See details on how to override this attribute in the new [Use of PXProjection: Overriding a Projection of an Existing DAC](#) topic.

Perform Self-Joins by Using the DAC Aliasing Technique

In relational databases, you implement a self-join by assigning multiple aliases to the same table in a query.

In Acumatica Framework, you achieve similar behavior by using Data Access Class (DAC) aliasing. Because the framework's object-relational mapping (ORM) system maps DACs to database tables at the type level, aliasing is implemented through Common Language Runtime (CLR) types rather than query syntax. See details on how to implement DAC aliasing and perform self-joins in the new [DAC Aliasing and Self-Joins](#) topic.

Reuse Business Logic

In an Acumatica Framework-based application, you may need to reuse the same business logic in multiple places. You can use dependency injection to encapsulate particular logic as a service, or you can include the main business logic of particular functionality (such as multicurrency processing) in reusable generic graph extensions.

These approaches for reusing business logic are now described more thoroughly in the following chapters:

- [Reusing Business Logic with Dependency Injection](#)
- [Reusing Business Logic with Generic Graph Extensions](#)

Mobile Framework: Customize the Design and Layout for a List of Records

Starting in Acumatica ERP 2026 R1, you can customize the design and layout of lists of records in the Acumatica mobile app. In a list of records on a mobile app screen, users can review key information, open individual records, and perform actions.

With the new customization capabilities, you can control how records and their fields look in these lists and what users can do with them. You can do the following:

- Highlight important fields
- Specify the alignment of fields
- Display fields in a table layout and organize the corresponding fields as name-value pairs on individual rows
- Place fields in a vertical stack
- Display available actions
- Specify the default placement of actions associated with `recordActionLink` objects
- Specify styles for actions associated with `recordActionLink` objects
- Modify numeric values directly in the list, without having to open the record
- Display the list of records as a selection list, which removes the ability to select or clear all records in the list

The following sections describe the new customization capabilities and how you can use them to improve lists of records in the mobile app.

Using the ListView Template

You can use the new `ListView` value to specify a template for the `layout` attribute of a `layout` object in Mobile Site Map Definition Language (MSDL).

Within a `ListView` template, you can control a field's visual emphasis by specifying one of the following options for the `style` property:

- *importance-low*: Uses a smaller font size and lighter weight (Items 1, 2 and 3 below) than medium
- *importance-medium* (default): Uses the medium font size and weight. You don't need to specify this value explicitly.
- *importance-high*: Uses a larger font size than medium and bold for the font weight (Item 4 below).

To specify the alignment of a field, you can specify one of the following values for the `style` property:

- *column-left* (default): Aligns the field to the left side of its container. You don't need to specify this value explicitly.
- *column-right*: Aligns the field to the right side of its container (Item 3 below).

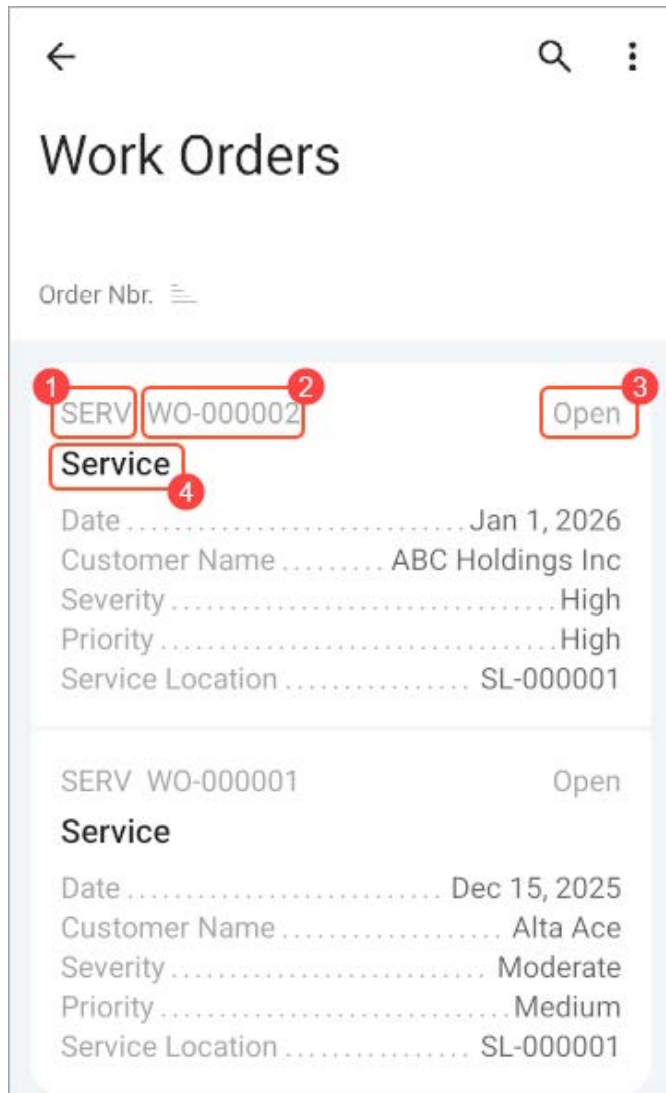


Figure: The styles and alignments in a ListView template

The following MSDL code corresponds to the screenshot above.

```

add container "Document" {
  add layout "listview" {
    displayName = "listview"
    layout = "ListView"
    add layout "line1" {
      displayName = "line1"
      layout = "Inline"

      add field "OrderType" {
        style = "importance-low"
      }
      add field "OrderNbr" {
        style = "importance-low"
      }
      add field "Status" {
        style = "importance-low column-right"
      }
    }
  }
}

```

```

add field "Summary" {
  style = "importance-high"
}
...
}
}

```

Customizing the Appearance of RecordActionLink Objects

A `ListView` template may include `recordActionLink` objects. You can control the alignment of the corresponding actions by using the `style` property and specifying one of the alignment options described earlier in this section.

You can also use the `style` property for `recordActionLink` objects to control how an action is displayed in the UI and whether its button has a background. You can specify the following values:

- `text`: Displays the action as text only without an icon
- `icon`: Displays the action as an icon only without any accompanying text
- `text-icon`: Displays the action with both an icon and text
- `background-none`: Removes the background from the button that represents the action

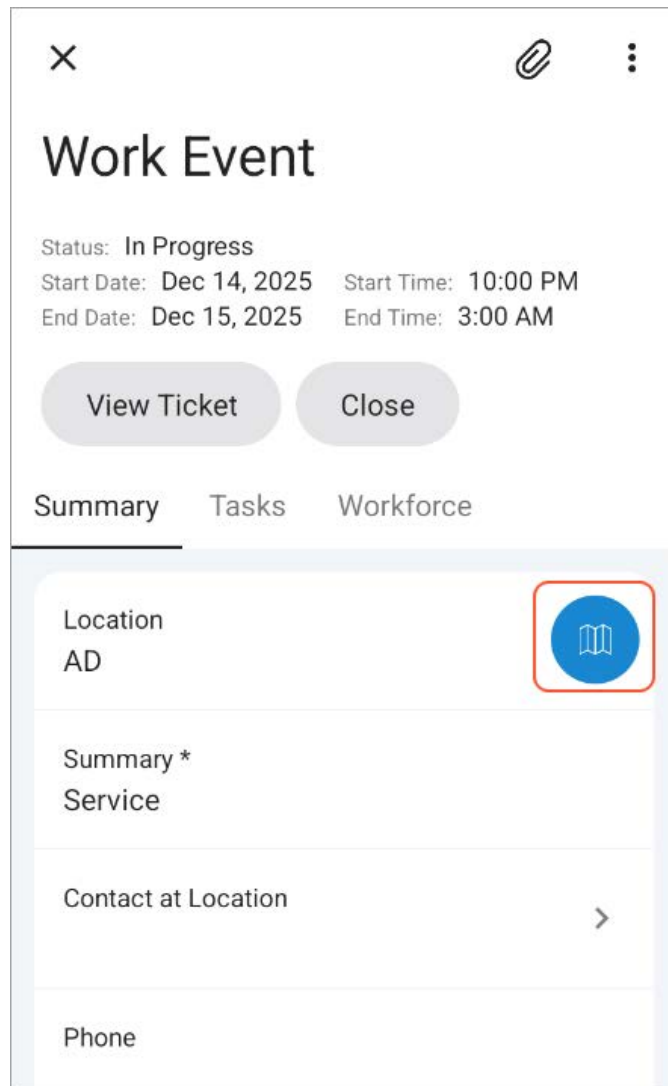


Figure: The result of specifying the icon option

Using the CaptionValueTable Template

Within a *ListView* template, you can use *CaptionValueTable* as the value for the `layout` attribute of a nested `layout` object. This template displays fields in a table format, organized as name–value pairs in individual rows. This can improve the readability of fields, as shown below.

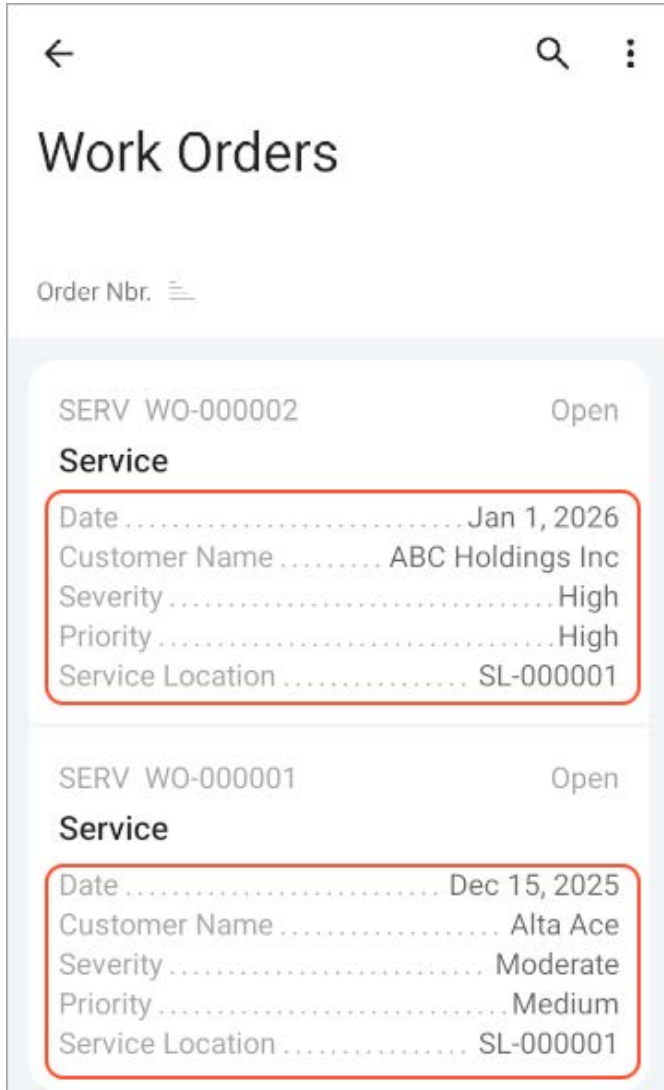


Figure: The *CaptionValueTable* template

The following MSDL code corresponds to the use of the *CaptionValueTable* template in the screenshot above.

```
add container "Document" {
  add layout "listview" {
    displayName = "listview"
    layout = "ListView"
    ...
    add layout "table" {
      displayName = "table"
      layout = "CaptionValueTable"
      add field "Date"
      add field "Customer" {
        selectorDisplayFormat = Key
      }
      add field "CustomerName"
```

```

    add field "Severity"
    add field "Priority"
    add field "ServiceLocation"
  }
}
...
}

```

Using the Column Template

Within a *ListView* template, you can also use *Column* as the value for the `layout` attribute of a nested `layout` object. This template lets you stack fields vertically, as shown below.

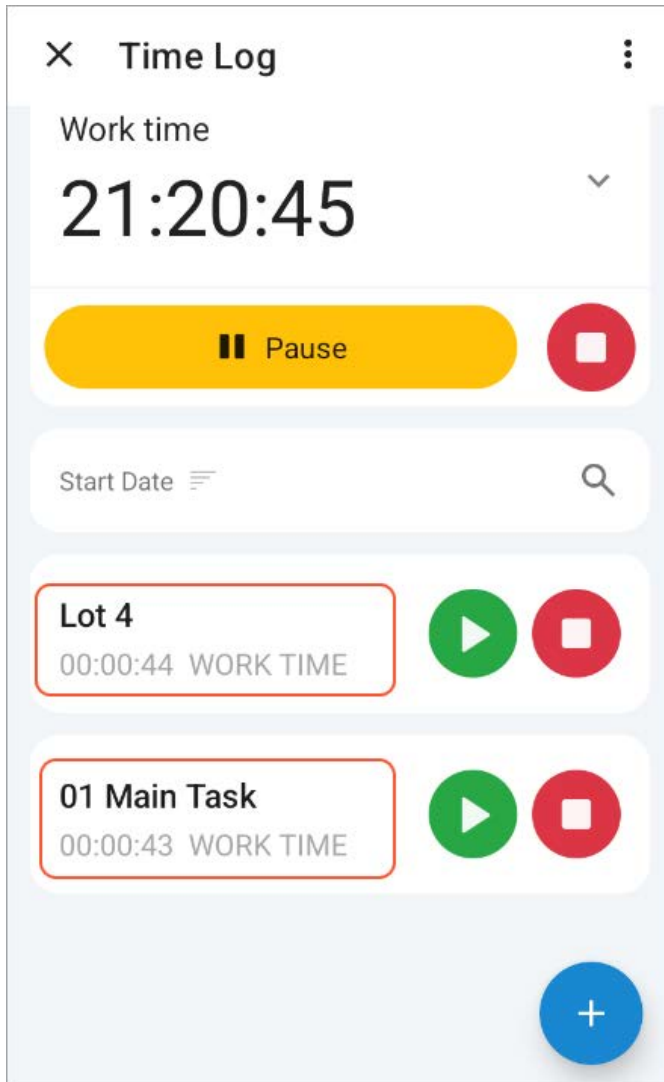


Figure: The Column layout



The following work only when they're defined within the scope of the *ListView* template and are ignored outside of this scope:

- The *CaptionValueTable* and *Column* templates
- The options of the `style` property (described earlier in this section)

Displaying the Available Actions for a Record

You can display the available actions for each record in a list of records by setting the `showActionsOnList` property to `True` in the MSDL code of the corresponding container. The available actions are rendered at the bottom of each record, as shown below.

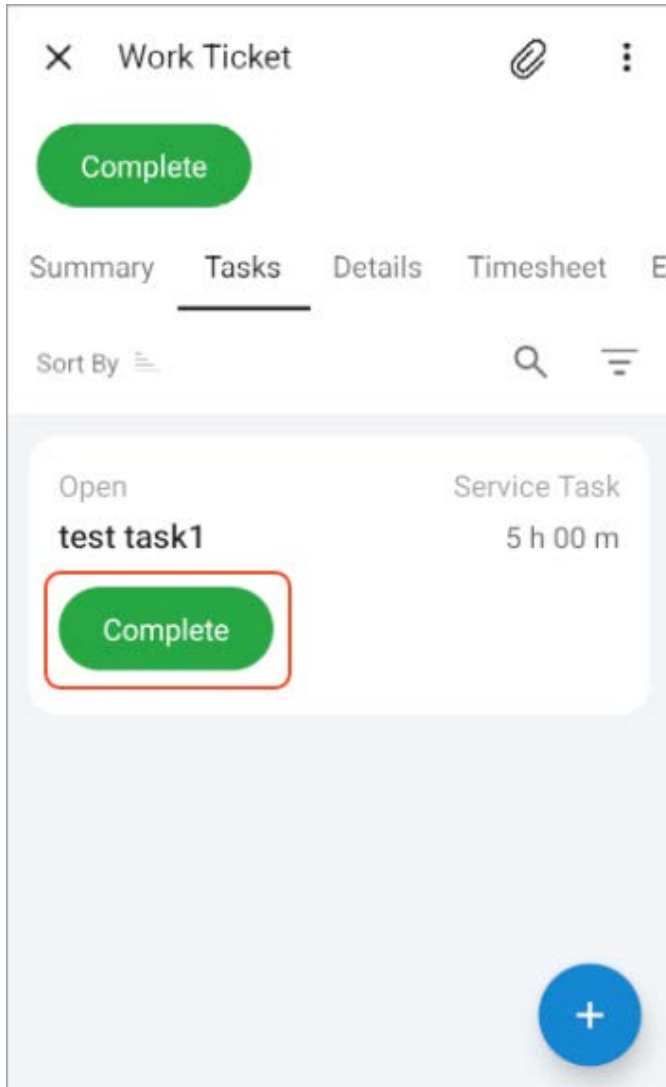


Figure: An action on a grid

The following MSDL code corresponds to the usage of the `showActionsOnList` property in the preceding screenshot.

```
add container "WorkTasks" {
  containerActionsToExpand = 1
  filter = "TicketWorkTasksFilter"
  showActionsOnList = True
  add layout "listview" {
    displayName = "listview"
    layout = "ListView"
    add layout "line1" {
      ...
    }
  }
}
```

```

    add layout "line2" {
        ...
    }
}
...
}

```



An action can be displayed for a record only if it has the `DisplayOnMainToolbar` property of the `PXButton` attribute set to `true`.

The system collects these actions in the following ways:

- For substitute screens, the actions are typically collected from the graph of the corresponding entry screen. For example, actions for sales orders on the Sales Orders (SO3010PL) screen are collected from the [Sales Orders](#) (SO301000) screen.
- For secondary containers on a screen—such as the container corresponding to the **Details** tab on the [Sales Orders](#) screen—the actions are collected from the current graph of the screen.

Editing Fields of a Record in a List

A user can now edit the values of certain fields of a record directly in a list of records without opening the record first. To make this possible, you specify the `Special = Counter` property in the MSDL code for the relevant fields of the record.

This property is particularly useful for numeric fields, such as those used to specify a quantity of items. The `Special = Counter` property makes a field editable (Item 1 below), and the UI provides buttons for increasing (Item 2) or decreasing (Item 3) its value.

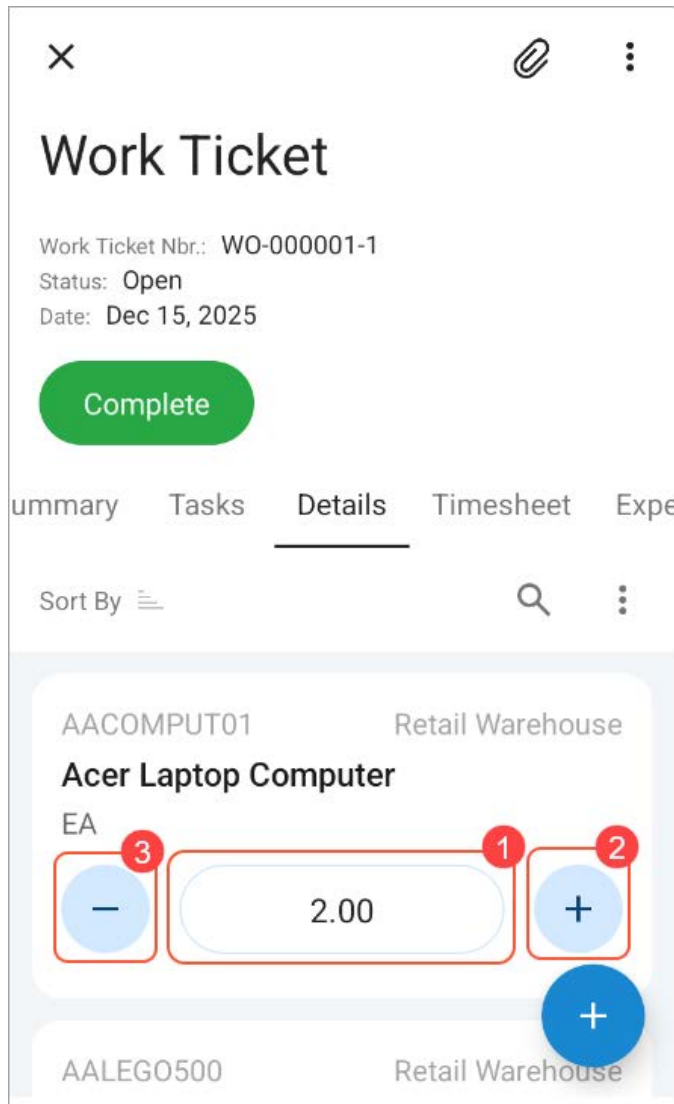


Figure: Use of the Counter property in a record

Using The SelectionList Container

Version 2026 R1 also introduces a new container type: `SelectionList`. To use this container type, you specify `Type = SelectionList` for a container. When this type is specified for a container displayed as a list, a user can't do the following in the resulting list:

- Select all records
- Clear all selected records

Below you can see a list of records based on this container.

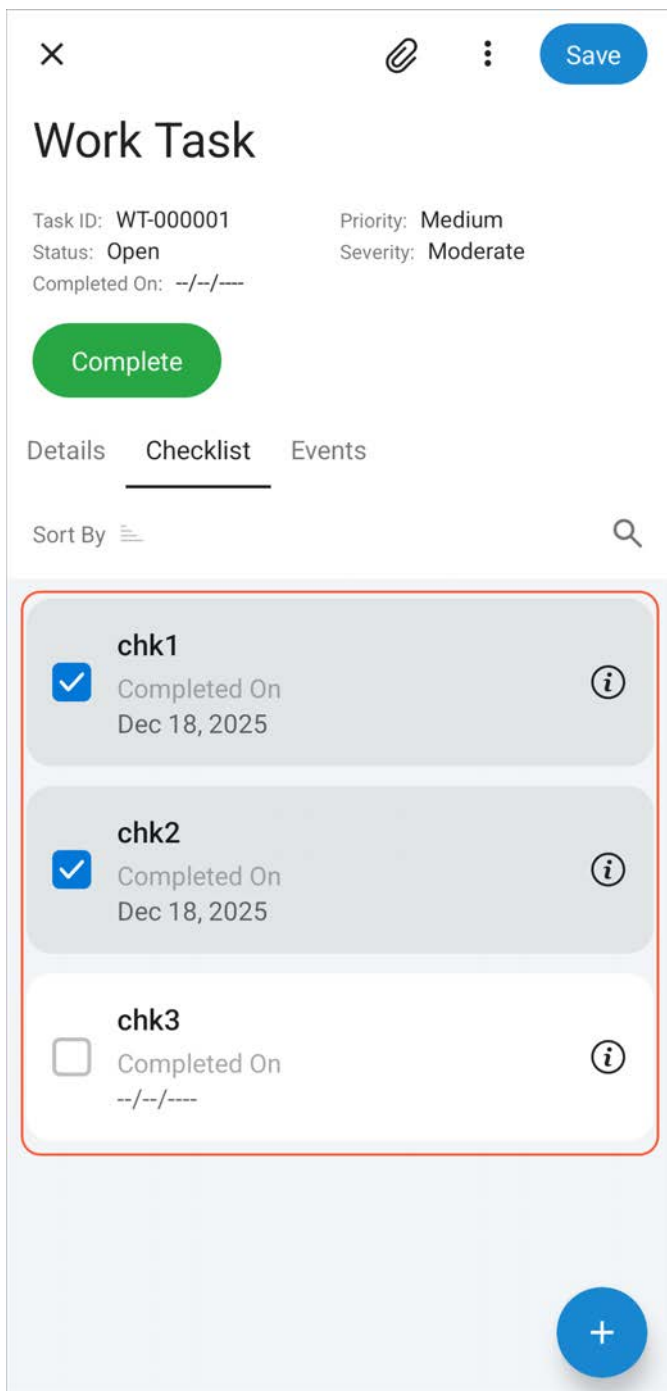


Figure: Use of a SelectionList container

Platform API: Multiple Implementations of a Generic Graph Extension in One Graph

In Acumatica ERP, you can reuse business logic by using generic graph extensions. Acumatica ERP 2026 R1 lets you go a step further: Now you can implement the same generic graph extension in a graph multiple times.

Suppose that in the custom `RSSVOrderEntry` graph, you need multiple implementations of the `SalesPriceGraph` generic graph extension, each with a different mapping of the `Detail` mapped cache extension. In one implementation class, you need to map `Detail` to the `RSSVOrderActual` data access class (DAC). In another implementation class, you map it to the `RSSVOrderDetail` DAC. The sections below show how you can do this.

Changes to the Generic Graph Extensions

A definition of reusable business logic with generic graph extensions typically includes the following parts:

- The generic graph extension itself, which is a `PXGraphExtension` class
- One or more mapped cache extensions, which are `PXMappedExtension` classes
- One or more mapping classes, which are `IBqlMapping` implementations

To support multiple implementations of generic graph extensions in one graph, Acumatica ERP 2026 R1 introduces the following changes:

- Generic graph extensions now can include multiple base DACs as their type parameters.
- Mapped cache extensions and mapping classes are nested within the generic graph extension.

The following code shows an example of a generic graph extension. Notice that the code includes simplified versions of the generic graph extension, which have fewer type parameters.

```
// A generic graph extension
public abstract partial class SalesPriceGraph<
    TGraph, TDocument, TDetailOpt, TPriceClassSourceOpt> :
    PXGraphExtension<TGraph>
    where TGraph : PXGraph
    where TDocument : class, IBqlTable, new()
    where TDetailOpt : class, IBqlTable
    where TPriceClassSourceOpt : class, IBqlTable
{
    // Mapped cache extensions
    public class Document : PXMappedCacheExtension
    public class Detail : PXMappedCacheExtension
    public class PriceClassSource : PXMappedCacheExtension

    // Mapping classes
    protected class DocumentMapping : IBqlMapping
    protected class DetailMapping : IBqlMapping
    protected class PriceClassSourceMapping : IBqlMapping
}

// Simplified versions of the generic graph extension
public abstract class SalesPriceGraph<TGraph, TPrimary> :
    SalesPriceGraph<TGraph, TPrimary, IBqlTable, IBqlTable>
    where TGraph : PXGraph
    where TPrimary : class, IBqlTable, new()
{ }
```

```
public abstract class SalesPriceGraph<TGraph, TDocument, TDetail> :
    SalesPriceGraph<TGraph, TDocument, TDetail, IBqlTable>
    where TGraph : PXGraph
    where TDocument : class, IBqlTable, new()
    where TDetail : class, IBqlTable, new()
{ }
```

Multiple Implementations in One Graph

To connect the generic graph extension to a base graph, in the base graph, you define an implementation class that inherits the generic graph extension. Starting in Version 2026 R1, you can define multiple implementation classes in one graph as follows (shown in the code below):

- In the `SalesPrice` implementation class, you map the `Detail` mapped cache extension to the `RSSVOrderActual` DAC.
- In the `SalesPriceActual` implementation class, you map the `Detail` mapped cache extension to the `RSSVOrderDetail` DAC.

```
public abstract class SalesPriceWithoutDetail<TDetail> :
    SalesPriceGraph<RSSVOrderEntry, RSSVOrder, TDetail>
    where TDetail : class, IBqlTable, new()
{
    #region Initialization

    protected override DocumentMapping GetDocumentMapping()
    {
        return new DocumentMapping(typeof(RSSVOrder))
        {
            BAccountID = typeof(RSSVOrder.customerID),
            DocumentDate = typeof(RSSVOrder.docDate),
        };
    }

    protected override PriceClassSourceMapping GetPriceClassSourceMapping()
    {
        return new PriceClassSourceMapping(typeof(Location))
        {
            PriceClassID = typeof(Location.cPriceClassID)
        };
    }
}
#endregion

protected override void RecalculateMarkup(PXCache sender, Detail row) { }
}

public class SalesPrice : SalesPriceWithoutDetail<RSSVOrderDetail>
{
    public static bool IsActive() => true;

    protected override DetailMapping GetDetailMapping()
    {
        return new DetailMapping(typeof(RSSVOrderDetail))
        {
            LocationID = typeof(RSSVOrderDetail.customerLocationID),
            CuryLineAmount = typeof(RSSVOrderDetail.curyExtPrice),
            Descr = typeof(RSSVOrderDetail.tranDesc),
            Quantity = typeof(RSSVOrderDetail.estimatedQty)
        }
    }
}
```

```

    };
}
}

public class SalesPriceActual : SalesPriceWithoutDetail<RSSVOrderActual>
{
    public static bool IsActive() => true;

    protected override DetailMapping GetDetailMapping()
    {
        return new DetailMapping(typeof(RSSVOrderActual))
        {
            LocationID = typeof(RSSVOrderActual.customerLocationID),
            CuryLineAmount = typeof(RSSVOrderActual.curyExtPrice),
            Descr = typeof(RSSVOrderActual.description),
            Quantity = typeof(RSSVOrderActual.actualQty),
            CuryUnitCost = typeof(RSSVOrderActual.curyStdCost),
            CuryUnitPrice = typeof(RSSVOrderActual.curyUnitPrice),
        };
    }
}
}

```

Upgrade Notes

To support multiple implementations of generic graph extensions in one graph, multiple mapped cache extensions have been nested in generic graph extensions as follows:

- In the `PX.Objects.Extensions.SalesPrice` namespace:
 - Detail has been replaced with `SalesPriceGraph<TGraph, TDocument, TDetailOpt, TPriceClassSourceOpt>.Detail`.
 - Document has been replaced with `SalesPriceGraph<TGraph, TDocument, TDetailOpt, TPriceClassSourceOpt>.Document`.
 - PriceClassSource has been replaced with `SalesPriceGraph<TGraph, TDocument, TDetailOpt, TPriceClassSourceOpt>.PriceClassSource`.
- In the `PX.Objects.Extensions.Discount` namespace:
 - Detail has been replaced with `DiscountGraph<TGraph, TDocument, TDetail, TDiscount>.Detail`.
 - Document has been replaced with `DiscountGraph<TGraph, TDocument, TDetail, TDiscount>.Document`.
 - Discount has been replaced with `DiscountGraph<TGraph, TDocument, TDetail, TDiscount>.Discount`.
- In the `PX.Objects.Extensions.SalesTax` namespace:
 - Detail has been replaced with `TaxBaseGraph<TGraph, TPrimary>.Detail`.
 - Document has been replaced with `TaxBaseGraph<TGraph, TPrimary>.Document`.
 - TaxDetail has been replaced with `TaxBaseGraph<TGraph, TPrimary>.TaxDetail`.
 - TaxTotal has been replaced with `TaxBaseGraph<TGraph, TPrimary>.TaxTotal`.

The following generic graph extensions have been replaced:

- `DiscountGraph<TGraph, TPrimary>` with `DiscountGraph<TGraph, TDocument, TDetail, TDiscount>`, which has the following simplified versions: `DiscountGraph<TGraph, TDocument>` and `DiscountGraph<TGraph, TDocument, TDetail>`
- `SalesPriceGraph<TGraph, TPrimary>` with `SalesPriceGraph<TGraph, TDocument, TDetailOpt, TPriceClassSourceOpt>`, which has the following simplified versions:

`SalesPriceGraph<TGraph, TPrimary>` and `SalesPriceGraph<TGraph, TDocument, TDetail>`

Suppose that your code uses the `Discount` mapped cache extension.

```
foreach (Discount discount
    in this.DiscountExtension.Discounts.Select())
{
}
```

You can adjust your code as shown below.

```
foreach (DiscountGraph<TGraph, TDocument>.Discount discount
    in this.DiscountExtension.Discounts.Select())
{
}
```

Learn More

For more information, see [Generic Graph Extensions: General Information](#).

Platform API: Support for Dependency Injection in the Credit Card Processing Framework

In Acumatica ERP 2026 R1, the credit card processing framework has been refactored to support **constructor-based dependency injection (DI)** for payment plug-ins. This refactoring gives you modern tools for creating more efficient, modular, and testable integrations.

The Big Picture

Previously, credit card processing plug-ins relied on the `ServiceLocator` pattern to resolve dependencies. These approaches limited testability and made plug-ins harder to maintain. The following code shows an example of such an approach.

```
protected async Task<HttpResponseBody> ExecuteAsync(HttpRequestMessage request)
{
    using (var client = ServiceLocator.Current
        .GetInstance<IHttpClientFactory>().CreateClient())
    {
        var response = await client.SendAsync(request);
        return response;
    }
}
```

In Version 2026 R1, the new framework replaces this pattern with **constructor-based dependency injection**. As a result, you can implement payment integrations that are **scalable and DI-friendly**.

Dependency Injection for Plug-In Creation

Plug-in dependencies are now injected directly through constructors. Instead of resolving plug-ins through `ServiceLocator`, the framework resolves them through a factory managed by the DI container.

To create a plug-in object, the framework provides a plug-in factory called `CCProcessingPluginFactory` in the `PX.Objects.CC.Factories` namespace. In its constructor, a dictionary of all registered plug-in types is injected, and an instance of a plug-in is received by the plug-in's fully qualified type name. You can use this factory when you need to create plug-in instances explicitly.

The following code snippet shows the implementation of the plug-in factory.

```
public class CCProcessingPluginFactory: ICCProcessingPluginFactory
{
    private readonly IIndex<string, ICCProcessingPlugin> _pluginIndex;

    public CCProcessingPluginFactory(IIndex<string,
        ICCProcessingPlugin> pluginIndex)
    {
        _pluginIndex =
            pluginIndex ?? throw new ArgumentNullException(nameof(pluginIndex));
    }

    public ICCProcessingPlugin CreatePluginForProcessingCenter
        (CCProcessingCenter processingCenter)
    {
        try
        {
            Type pluginType =
```

```

        CCPluginTypeHelper.GetPluginTypeWithCheck(processingCenter);
        return CreatePluginForPluginType(pluginType.FullName);
    }
    catch (PXException)
    {
        throw;
    }
    catch (Exception ex)
    {
        throw new PXException(ex,
            AR.Messages.ERR_ProcessingCenterTypeInstanceCreationFailed,
            processingCenter.ProcessingTypeName,
            processingCenter.ProcessingCenterID);
    }
}

public ICCProcessingPlugin CreatePluginForPluginType(
    string pluginTypeFullName)
{
    if (string.IsNullOrEmpty(pluginTypeFullName))
    {
        throw new ArgumentNullException(nameof(pluginTypeFullName));
    }
    if (!_pluginIndex.TryGetValue(pluginTypeFullName,
        out ICCProcessingPlugin plugin))
    {
        throw new PXException(
            AR.Messages.ERR_ProcessingCenterTypeInstanceCreationFailed,
            pluginTypeFullName, "Unknown");
    }
    return plugin;
}
}
}

```

Plug-In Registration

The system automatically registers all plug-ins as services in the DI container. So if you develop a new plug-in, no additional registration steps are required.

To register plug-in types, the system checks available assemblies (by using the `PXProviderTypeSelectorAttribute.GetTypesImplementing` method) for implementations of the `CCProcessingBase.Interfaces.V2.ICCProcessingPlugin` interface. The system then registers every type as a named service. The following code shows an example.

```

using System;
using Autofac;
using PX.CCProcessingBase.Interfaces.V2;
using PX.CCProcessingBase.Logging.V2;
using PX.Objects.CC.Factories;
using PX.Objects.Common;

namespace PX.Objects.AR.CCPaymentProcessing
{
    internal class ServiceRegistration : Module
    {
        {
            protected override void Load(ContainerBuilder builder)
            {

```

```

builder.RegisterType<CCProcessingPluginFactory>()
    .As<ICCPProcessingPluginFactory>().SingleInstance();

foreach (var type in PXProviderTypeSelectorAttribute
    .GetTypesImplementing(typeof(ICCPProcessingPlugin)))
{
    builder.RegisterType(type)
        .Named<ICCPProcessingPlugin>(type.FullName);
}
builder.RegisterDecorator<
    LoggingProcessingPlugin, ICCProcessingPlugin>();
}
}
}

```

Note that this approach works for both built-in plug-ins and third-party plug-ins delivered as part of a customization project.

Key Changes

- Credit card processing is now fully **DI-enabled**.
- The `ServiceLocator` pattern usages have been replaced with **constructor-based dependency injection**.
- The `CCProcessingPluginFactory` is used for safe, DI-driven plug-in instantiation.

Upgrade Notes

As a result of the credit card processing framework being refactored to support dependency injection, changes have been made to some data access classes (DACs) and methods.

The `PX.Objects.CA.PXProviderTypeSelectorAttribute.ProviderRec` DAC has been replaced with `PX.Objects.Common.PXProviderTypeSelectorAttribute.ProviderRec`.

The following methods have been replaced:

- In the `PX.Objects.AR.CCPaymentProcessing.CardsSynchronization` namespace:
 - `CCSynchronizeCardManager.ctor(PXGraph, String, CreditCardReceiverFactory)` with `CCSynchronizeCardManager.ctor(PXGraph, String, CreditCardReceiverFactory, ICCProcessingPluginFactory)`
- In the `PX.Objects.AR.CCPaymentProcessing` namespace:
 - `CCCCustomerInformationManager.GetCreatePaymentProfileForm(PXGraph, ICCPaymentProfileAdapter)` with `CCCCustomerInformationManager.GetCreatePaymentProfileForm(PXGraph, ICCPaymentProfileAdapter, ICCProcessingPluginFactory)`
 - `CCCCustomerInformationManager.GetNewPaymentProfiles(PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter)` with `CCCCustomerInformationManager.GetNewPaymentProfiles(PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter, ICCProcessingPluginFactory)`
 - `CCCCustomerInformationManager.GetManagePaymentProfileForm(PXGraph, ICCPaymentProfile)` with `CCCCustomerInformationManager.GetManagePaymentProfileForm(PXGraph, ICCPaymentProfile, ICCProcessingPluginFactory)`
 - `CCCCustomerInformationManager.ProcessProfileFormResponse(PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter, String)`

- with `CCCustomerInformationManager.ProcessProfileFormResponse (PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter, ICCProcessingPluginFactory, String)`
- `CCCustomerInformationManager.GetOrCreatePaymentProfile (PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter)` with `CCCustomerInformationManager.GetOrCreatePaymentProfile (PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter, ICCProcessingPluginFactory)`
- `CCCustomerInformationManager.GetPaymentProfile (PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter)` with `CCCustomerInformationManager.GetPaymentProfile (PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter, ICCProcessingPluginFactory)`
- `CCCustomerInformationManager.DeletePaymentProfile (PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter)` with `CCCustomerInformationManager.DeletePaymentProfile (PXGraph, ICCPaymentProfileAdapter, ICCPaymentProfileDetailAdapter, ICCProcessingPluginFactory)`
- `CCCustomerInformationManager.GetCustomerProfile (PXGraph, String, String)` with `CCCustomerInformationManager.GetCustomerProfile (PXGraph, String, String, ICCProcessingPluginFactory)`
- `CCCustomerInformationManager.ctor (ProcessingCardsPluginFactory)` with `CCCustomerInformationManager.ctor (Object)`
- In the `PX.Objects.AR.CCPaymentProcessing.Helpers` namespace:
 - `CCPluginTypeHelper.GetProcessor<T> (CCProcessingCenter, ICardProcessingReadersProvider, CCProcessingFeature)` with `CCPluginTypeHelper.GetProcessor<T> (Object, ICardProcessingReadersProvider, CCProcessingFeature)`
 - `CCProcessingFeatureHelper.IsPaymentHostedFormSupported (CCProcessingCenter)` with `CCProcessingFeatureHelper.IsPaymentHostedFormSupported (CCProcessingCenter, ICCProcessingPluginFactory)`
 - `CCProcessingHelper.CCProcessingCenterNeedsExpDateUpdate (PXGraph, CCProcessingCenter)` with `CCProcessingHelper.CCProcessingCenterNeedsExpDateUpdate (PXGraph, CCProcessingCenter, ICCProcessingPluginFactory)`
 - `CCProcessingHelper.GetTokenizedPMsString (PXGraph)` with `CCProcessingHelper.GetTokenizedPMsString (PXGraph, ICCProcessingPluginFactory)`

Note that the `CCProcessingFeatureHelper` class is static now.

- In the `PX.Objects.CA` namespace:
 - `PXProviderTypeSelectorAttribute.GetProviderRecs (Type [])` has been replaced with `PXProviderTypeSelectorAttribute.GetProviderRecs (Type [])`, which is now available in the `PX.Objects.Common` namespace.
 - `PXProviderTypeSelectorAttribute+ProviderRec.ctor ()` has been replaced with `PXProviderTypeSelectorAttribute+ProviderRec.ctor ()`, which is now available in the `PX.Objects.Common` namespace.
- In the `PX.Objects.CC.PaymentProcessing` namespace, the following methods have been replaced:
 - `Level3Processing.ctor ()` with `Level3Processing.ctor (ICCProcessingPluginFactory)`

- `Level3Processing.ctor (ICCPaymentProcessingRepository)`
`with Level3Processing.ctor (ICCPaymentProcessingRepository,`
`ICCProcessingPluginFactory)`
- `MobileTerminalProcessing.ctor (PXGraph, IAuthorizationManager,`
`IApplicationManager) with MobileTerminalProcessing.ctor (PXGraph,`
`IAuthorizationManager, IApplicationManager, ICCProcessingPluginFactory)`
- `PayLinkProcessing.ctor (ICCPaymentProcessingRepository)`
`with PayLinkProcessing.ctor (ICCPaymentProcessingRepository,`
`ICCProcessingPluginFactory)`

In the `PX.Objects.Extensions.PaymentTransaction` namespace:

- `PaymentTransactionGraph<TGraph, TPrimary>.GetClassMethodName ()` **with**
`PaymentTransactionGraph<TGraph, TPrimary>.GetClassMethodName (String)`

The following methods have been removed:

- **In the `PX.Objects.AR.CCPaymentProcessing.Helpers` namespace:**
 - `CCPluginTypeHelper.CreatePlugin (CCProcessingCenter)`
 - `CCProcessingFeatureHelper.ctor ()`

UI Development: New Phone Control

Acumatica ERP 2026 R1 introduces a new control that lets you start a call directly from a phone number entered in a text box. The new control looks like a text box with a phone icon, as shown below. When you tap the phone icon, the system opens the default phone app of your device and calls the specified number.

The screenshot shows a 'Ship-To Contact' form with the following fields:

- Override Contact:** A checkbox that is currently unchecked.
- Account Name:** Agrilink Food
- Attention:** (Empty field)
- Email:** cheftell@agrilink.com (with an envelope icon)
- Business 1:** +1 (281) 231-1232 (with a phone icon and a red border around the text)
- Business 2:** (Empty field with a phone icon)

Figure: The phone control



The Phone control is available only in the Modern UI.

Configuration of the Phone Control

In the backend, the phone field is configured as a regular string field with optional business logic attributes. An example of such a field is shown in the following code.

```
[PXDBString(50)]
[PXUIField(DisplayName = "Business 1", Visibility = PXUIVisibility.SelectorVisible)]
[CR.PhoneValidation()]
[PXPersonalDataField]
public virtual String Phone1 { ... }
public abstract class phone1 : PX.Data.BQL.BqlString.Field<phone1> { }
```

In the frontend, the name of the control is `qp-phone-editor`. To enable the control, you need to specify the type of the control (`qp-phone-editor`) in the `fieldConfig` decorator, as shown below.

```
@fieldConfig({ controlType: "qp-phone-editor" })
Phone1: PXFieldState;
```

Web Services: Clear Identification of Custom and Inherited Elements in Endpoints

In Acumatica ERP, you can create custom endpoints and endpoint extensions to work with the entities and fields that aren't available in the system endpoints. The latest improvements in Version 2026 R1 let you instantly identify which endpoint elements are custom or inherited—right on the [Web Service Endpoints](#) (SM207060) form. With these new capabilities, you can maintain endpoints with greater accuracy and less guesswork.

Quickly Spot Custom Fields

On the [Web Service Endpoints](#) (SM207060) form, now you can immediately spot the fields that come from your customization projects. You can see the names of data access class fields (including the `USR` prefix for custom fields) in the **Data Field** column (see below).

* Field Name	↑ Mapped Object	Mapped Field	Data Field	* Field Type	Inherited
PriceWorkgroup		PriceWorkgroupID	PriceWorkgroupID	StringValue	<input checked="" type="checkbox"/>
ProductManager	Stock Item Summary	Product Manager	ProductManagerID	StringValue	<input checked="" type="checkbox"/>
ProductWorkgroup	Stock Item Summary	Product Workgroup	ProductWorkgroupID	StringValue	<input checked="" type="checkbox"/>
PurchasePriceVarianceAccount		PPVAcctID	PPVAcctID	StringValue	<input checked="" type="checkbox"/>
PurchasePriceVarianceSubaccount		PPVSubID	PPVSubID	StringValue	<input checked="" type="checkbox"/>
PurchaseUOM		PurchaseUnit	PurchaseUnit	StringValue	<input checked="" type="checkbox"/>
ReasonCodeSubaccount		ReasonCodeSubID	ReasonCodeSubID	StringValue	<input checked="" type="checkbox"/>
RepairItem	Inventory Item Settings	Repair Item	UsrRepairItem	BooleanValue	<input type="checkbox"/>
RepairItemType	Inventory Item Settings	Repair Item Type	UsrRepairItemType	StringValue	<input type="checkbox"/>
SalesAccount		SalesAcctID	SalesAcctID	StringValue	<input checked="" type="checkbox"/>
SalesSubaccount		SalesSubID	SalesSubID	StringValue	<input checked="" type="checkbox"/>
SalesUOM		SalesUnit	SalesUnit	StringValue	<input checked="" type="checkbox"/>
SearchKeywords		SearchKeywords	SearchKeywords	StringValue	<input checked="" type="checkbox"/>

Figure: Data Field column

Trace Inheritance at a Glance

For every entity, action, field, and parameter on the [Web Service Endpoints](#) (SM207060) form, you can now instantly understand whether it's inherited or newly added:

- In the **Endpoint Structure** pane, the icons of entities and actions are color coded:
 - Green for a new entity or action (Item 1 below)
 - Blue for an inherited entity that has been extended (Item 2)
- A new field has the **Inherited** check box cleared on the **Fields** tab (Item 3).
- A new parameter has the **Inherited** check box cleared on the **Parameters** tab. The tab is displayed in the right pane when you select an action in the **Endpoint Structure** pane.

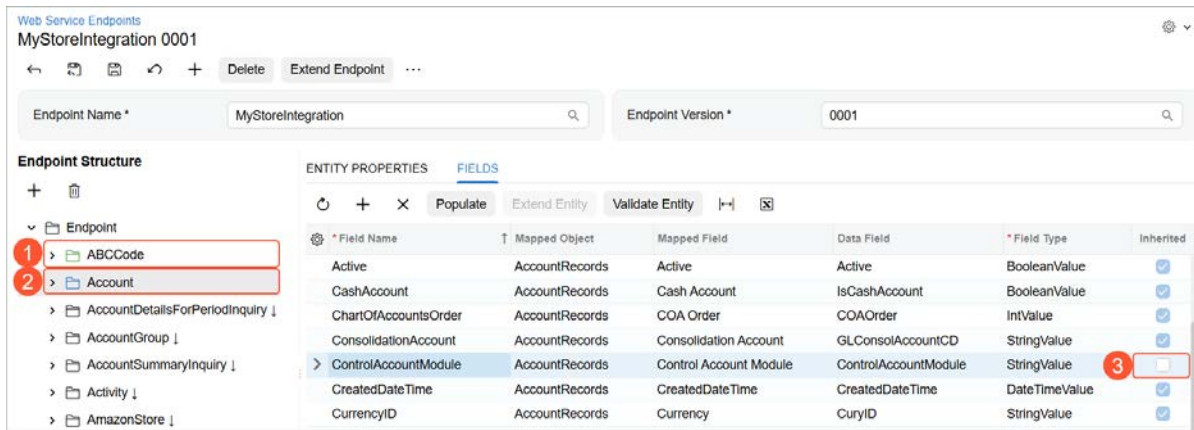


Figure: New and inherited elements

Learn More

For more information, see [Custom Endpoints and Endpoint Extensions](#) and [Custom Fields](#).