Acumatica ERP 5.3 Release Notes

Contents

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Software Version: 5.3

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Introduction

This document provides important information about fixes, enhancements, and key features that are available in Acumatica ERP 5.3. The document is of particular interest to those who install Acumatica ERP or develop applications for it. All users can benefit from reviewing this content to determine how they may benefit from the changes in this release.

To try new features and improvements, you can use the demo company, which you can easily deploy by selecting the *SalesDemo* item in the Acumatica ERP Configuration Wizard. For detailed information on deploying the demo company and working with the demo data, see *Demo Materials* on the Acumatica ERP partner's portal.

Enhanced Configuration of Deductible VAT

Acumatica ERP supports the configuration of a deductible value-added tax. With a tax of this type, you can deduct the tax amount calculated according to the specified deductible rate from the tax amount paid to the vendor, and then claim this tax amount from the appropriate tax agency. In this case, the non-deductible tax amount is recorded as expenses.

In the previous versions of Acumatica ERP, the non-deductible tax amount has been posted to the tax expense account (and the corresponding tax expense subaccount, if applicable) that you have specified in the settings of the tax on the **GL Accounts** tab of the *Taxes (TX.20.50.00)* form.
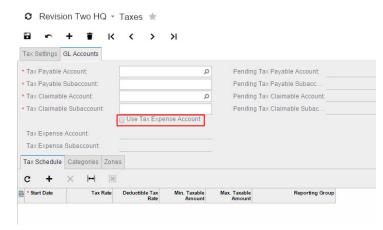
In Acumatica ERP 5.3, this functionality has been expanded and optimized. By request of Acumatica ERP users who wanted to record tax expenses on the same GL account as the amount of an AP bill, it is now possible to post the non-deductible tax amount to the expense account specified in the details of each particular AP bill.

Thus, now you can select the way to post the non-deductible tax amount while configuring a deductible VAT. You can configure the deductible VAT so that the non-deductible tax amount will be posted either to the tax expense account (and subaccount, if applicable) that you specify in the settings of a tax, or to the expense account specified in each required AP document.

New Setup Option (AC-52138)

You configure a deductible VAT on the *Taxes (TX.20.50.00)* form. In previous versions of Acumatica ERP, after you selected the **Deductible VAT** check box, you had to specify the tax expense account (and tax expense subaccount, if any) in the corresponding boxes on the **GL Accounts** tab, so that the non-deductible tax amount calculated in taxable documents with this tax was recorded to this GL account.

Now the **Use Tax Expense Account** check box has been added to the *Taxes (TX.20.50.00)* form.

Figure: Use Tax Expense Account Check Box

If you leave the **Use Tax Expense Account** check box cleared, the **Tax Expense Account** box (and the **Tax Expense Subaccount** box, if applicable) remains unavailable for editing. In this case, the non-deductible tax amount will be posted to the expense account or accounts specified in each detail line of an AP bill.

If you select the **Use Tax Expense Account** check box, the **Tax Expense Account** box (and the **Tax Expense Subaccount** box, if applicable) becomes available for editing. In this box (or these boxes), you can specify the GL accounts to which the system will post the non-deductible tax amounts calculated in the taxable documents in which this tax is applied.

New Sales Profitability Reports

Completely new sales profitability reports were added to the Finance suite. The reports will provide your company with any data that might be needed to improve the quality of the sales profitability analysis, monitor sales of specific products, and identify trends in customer buying behavior.

New Reports (AC-45635)

The following reports (available in the *Summary* and *Detailed* formats) are added:

- *Sales Profitability by Item and Order (AR.67.10.00)*: This report shows the net sales amounts, costs, and margins for the items that were sold during the specified date range. The report in detailed format shows the data broken down by sales orders. Additionally, the data can be filtered by customer.

- *Sales Profitability by Customer and Order (AR.67.20.00)*: This report shows the net sales amounts, costs, margins, and margin percents on the sales to each customer during the specified date range. The report in detailed format shows the data broken down by sales order. Additionally, the data can be filtered by inventory item.

- *Sales Profitability by Salesperson and Customer (AR.67.30.00)*: This report shows the net sales amounts, costs, margins, and margin percents calculated for the sales performed by particular salespersons during the specified date range. The report in detailed format shows the data broken down by customer. Additionally, the data can be filtered by inventory item.

- *Sales Profitability by Item Class and Item (AR.67.40.00):* This report shows the net sales amounts, costs, margins, and margin percents calculated on per inventory item and item class basis on the sales occurred during the specified date range. The report in detailed format shows the data broken down by sales orders. Additionally, the data can be filtered by customer.

- *Sales Profitability by Customer Class and Customer (AR.67.50.00):* This report displays the net sales amounts, costs, margins, and margin percents on all sales to each customer class and each customer during the specified date range. Additionally, the data can be filtered by inventory item.

- *Daily Sales Profitability (AR.67.60.00):* This report displays the net sales amounts, costs, margins, and margin percents calculated on the documents of specific type for the specified date range and broken down by customer. The report in detailed format shows the profitability data for each day within the specified date range. Additionally, the data can be filtered by inventory item.

Other Report Improvements

Area/Form	Change	Issue ID
AR Aged Past Due (AR.63.10.00) *AR Aged Past Due MC (AR.63.11.00)* *AR Aged Outstanding (AR.63.15.00)* *AR Aged Outstanding MC (AR.63.16.00)*	With the **Age Credits** check box cleared on the *Accounts Receivable Preferences (AR.10.10.00)* form, the value in the **Aging Date** box of the applicable report form will now be printed in the **Due Date** column of the applicable report for unapplied credit memos and payments..	**AC-51820**

Area/Form	Change	Issue ID
Invoice/Memo (AR.64.10.00) *Purchase Order (PO.64.10.00)* *Item Request (RQ.64.10.00)* *Quote (SO.64.10.00)* *Sales Order (SO.64.10.10)* *Invoice & Memo (SO.64.30.00)*	The *CanGrow* property is now set to *True* for the text boxes that show notes on the listed reports.	**AC-56072**
AP Payment Register (AP.62.25.00)	The following changes were made: • The redundant **Date** column header was removed. • In the footer, the **Company Total (CUR)** label was removed. • In the footer, the **Report Total** label was renamed to **Company Total**.	**AC-59108**
CA Edit (CA.61.20.00) *CA Edit Detailed (CA.61.25.00)*	In these reports, the new parameter **Include Transactions on Hold** was added so you can include the transactions that have the *Hold* status.	**AC-62511**
Report forms	If the **Shared** check box is selected for a report template, the **Default** check box becomes unavailable. Only non-default templates could be shared.	**AC-53197**
Analytical reports, inquiries, scenarios, Report Designer	The following functions have been changed: `Now()` and `Today()` return the time in the user's time zone; `NowUTC()` and `TodayUTC()` return the time in UTC (without any time zone offset).	**AC-55840**
Reports	All SQL queries for reports on MySQL are preceded by the `set session group_concat_max_len = 1M` command, which increases the maximum result length to 1 megabyte.	**AC-60879**

Improved Processing of Bank Transactions

In Acumatica ERP 5.3, the processing of bank transactions has been significantly improved. All the changes are intended to increase the usability of processing bank statements and to process Accounts Receivable and Accounts Payable batch payments similarly.

Matching Multiple Payments to a Bank Transaction (AC-49533)

Financial institutions may report a batch of payments as a single line on the bank statement. In previous versions of Acumatica ERP, it was possible to reconcile a bank statement line with only an Accounts Receivable batch payment that was created by means of Acumatica ERP deposits. For an Accounts Payable payment batch reported as a single line on the bank statement, a user had to hide the bank transaction that reported a payment batch from the imported statement on the *Import Bank Transactions (CA.30.65.00)* form and then manually clear payments from the batch on the *Reconciliation Statements (CA.30.20.00)* form.

In Acumatica ERP 5.3, you can now clear and reconcile a bank transaction for an Accounts Payable batch payment in the same way as you can clear and then reconcile an Accounts Receivable batch payment.

Setting Up Matching of AP Batch Payments and Further Processing

The **Match Bank Transactions to Batch Payments** check box has been added to the *Cash Accounts (CA.20.20.00)* form, as shown in the following screenshot. You select this check box to indicate to the system that during processing of the imported bank transactions on the *Process Bank Transactions (CA.30.60.00)* form, the system should search for a match among Accounts Payable batch payments, as well as among individual payments.

Figure: New check box on Cash Accounts (CA.20.20.00)

With the **Match Bank Transactions to Batch Payments** check box selected for a cash account, when you process imported transactions on the *Process Bank Transactions (CA.30.60.00)* form and match (manually or automatically) a bank transaction to an Accounts Payable batch, the system clears the batch and all of its payments.

With this check box cleared, the system works as it did in previous versions. In this case, all payments to vendors are displayed on the **Match to Payments** tab of the *Process Bank Transactions (CA.30.60.00)* form as separate lines, regardless of whether they have been processed in a batch.

Reconciling AP Batch Payments

With the **Match Bank Transactions to Batch Payments** check box selected for a cash account, when you prepare a reconciliation statement on the *Reconciliation Statements (CA.30.20.00)* form, the system displays this Accounts Payable batch in the list of transactions instead of the individual payments from this batch. When you save the reconciliation statement for the first time and the system

assigns a reference number to it, the value of the **Match Bank Transactions to Batch Payments** check box at this moment is preserved by the system for this reconciliation statement. The system will handle Accounts Payable batch payments based on the original setting before you first saved the reconciliation statement. If you change the value of the check box after the reconciliation statement was first saved, the system will display the **Bank Transactions Are Matched to Batch Payments** check box on the *Reconciliation Statements (CA.30.20.00)* form. This check box will reflect the value of **Match Bank Transactions to Batch Payments** at the moment when the statement was first saved.

For details on clearing and reconciling batch payments, see the Cash Management>Managing Bank Statements>Processing Imported Transactions>Batch Payment Matching topic in the User Guide.

Improving the Usability of Processing Bank Statements (AC-55853)

Over a year ago, the new process of handling bank statements was introduced. In Acumatica ERP 5.3, the usability of this process has been improved based on customer feedback.

The major improvements that have been implemented include the following:

- The processes of uploading statement files and importing statements from an Excel file have been improved.

- On the *Process Bank Transactions (CA.30.60.00)* form:

    - When a user selects a bank transaction, the most relevant tab is now opened by default based on the available matches.

    - The *Matched*, *Unmatched*, and *All* options have been added to the filter on the table toolbar, so you can view matched, unmatched, and all transactions in the statement you are working with.

    - Unmatched records in a partially processed statement can now be edited.

    - The color codes used to differentiate the status of the current transactions have been replaced by the check box in the ✓ column and the **Match Type** column.

    - Tips displayed in the status panel have been added.

- On the *Import Bank Transactions (CA.30.65.00)* form, processed transactions can now be unmatched by using the new **Unmatch** button on the table toolbar.

User Interface Changes

The following user interface changes have been made to the *Process Bank Transactions (CA.30.60.00)* since previous versions:

Area	Original Caption	New Caption
Form toolbar	**Process Matched Lines**	**Process**
Table toolbar	**Clear Match**	**Unmatch**
Table toolbar	**Clear All Matches**	**Unmatch All**
Table toolbar	**Hide Transaction**	**Hide**
Table columns	**Matched**	✓

Integration with HubSpot

In Acumatica ERP 5.3, the feature of integration with HubSpot has been introduced, which gives you the ability to export leads from Acumatica ERP to HubSpot for nurturing and then import the leads back to Acumatica ERP for further processing.

You can export and import leads by using integration scenarios. For information on how to prepare an integration scenario, see the Integration>Overview>Scenarios for Data Import and Integration>Overview>Scenarios for Data Export topics in the User Guide.

When creating an integration scenario, you need to specify an appropriate data provider. To create a data provider that supports integration with HubSpot, you need to use a specific built-in provider type: *HubSpot Provider*.

You can create a data provider that supports integration with HubSpot by using the *Data Providers (SM.20.60.25)* form as follows:

1. In the **Name** box, type the name of the data provider (for instance, *HubSpot*).

2. In the **Provider Type** box, select *PX.DataSync.HubSpot.HSSYProvider*.

3. On the **Parameters** tab, specify the following settings:

   - *Hapikey*: Your HubSpot API key

   - *PortalID*: Hub ID

   - *HubSpotList*: The name of the list to be used for synchronization between Acumatica ERP and HubSpot (if no such list exists yet, it will be created automatically during the first export or import)

4. On the **Schema** tab, click **Fill Schema Objects** and then **Fill Schema Fields**.

   > You can deactivate some of the fields that you are not going to use in your integration scenario.

5. Click **Save** on the form toolbar to save the changes.

We recommend that you validate imported leads for duplicates by using the properly configured *Lead/Contact Duplicate Validation* feature—for instance, allowing only unique emails and validating leads on entry. For more information about duplicate validation, see the Customer Management>Managing Leads and Contacts>Duplicate Validation topic in the User Guide.

Enhanced Project Stock Management

A project stock is a quantity of a material that is held in stock for a particular project task. As the material is issued against this task, you may want to track and manage the project stock that is available for the whole project.

In Acumatica ERP, a project stock is managed through the management of warehouse locations that can be associated with projects and project tasks, which makes it possible to automatically associate inventory transactions with relevant project tasks. To make the functionality of project stock management easier-to-use and to improve its reliability, the following enhancements have been introduced in Acumatica ERP 5.3:

- For inventory withdrawals, the default values for the **Project** and **Project Task** boxes on the *Issues (IN.30.20.00)* form are transferred from the issuing storage location.

- The system no longer allows assigning a different project task to a storage location on the Warehouses (IN.20.40.00) form if the location has a non-zero quantity on hand or if an unreleased inventory transaction, purchase receipt or sales order shipment exists that affects this storage location in any way.

- Appropriate project tasks are automatically specified for inventory transfers and accounts payable bills with a purchase price variance.

- Appropriate project and project task are now automatically transferred from a blanket purchase order to a related normal purchase order.

- A new purchase receipt is now automatically assigned an appropriate storage location that is associated with a particular project task and located in the warehouse specified for the related purchase order.

- The system will display a warning message if a user tries to create a purchase order that includes a stock item associated with a project task without a storage location.

- During an inventory issue release, the system generates general ledger batches for the standard price difference account, and the batches no longer contain zero lines.

- If a project task is assigned to a sales order, the sales order is shipped by default to the location assigned to the specified project task.

- If approval is required for purchase orders, the system does not allow changing the project specified for a purchase receipt or for an accounts payable bill. If no approval is required for purchase orders, the project, as well as the project task, can be changed for an accounts payable bill that has been created for a purchase order without a purchase receipt.

- If an accounts payable bill is entered for a project-related purchase order, the lines of the bill are automatically associated with the project and project task specified for the purchase order. In the general ledger batch generated for a project-related accounts payable bill, the PO Accrual account is automatically associated with the project task specified in the corresponding line of the accounts payable bill.

Improved Integration with Exchange Server

In Acumatica ERP 5.3 , the reliability and performance of the synchronization between Acumatica ERP and Microsoft Exchange Server have been improved.

Implemented Improvements

Synchronization with Microsoft Exchange Server is now performed significantly faster than it was previously. SQL queries have been optimized to reduce the workload on the database servers. As a result of this optimization, the `SyncTimeTag` field has been removed from the `Contact` and `EPActivity` tables; if this field was previously used in any custom process related to contacts or activities, it can be replaced with an identical field from the `SyncTimeTag` table.

Also, the following enhancements have been implemented:

- Synchronization of all-day events is now supported.

- A new synchronization scenario is now available for any contact that has been deleted, closed, or purged in Acumatica ERP. If the synchronization direction for the policy is set to either *Bidirectional* or to *From Acumatica to Exchange*, the corresponding contact in Exchange is deleted as a result of the synchronization. If the synchronization direction is set to *From Exchange to Acumatica*, the contact is not available for synchronization and the corresponding contact on Exchange is not deleted.

- Email messages that contain references to cases or opportunities are now tracked in Acumatica ERP and get associated with the corresponding entities. Replies to an email related to a particular entity also get associated with that entity, and no new cases are created based on these replies when incoming mail processing is enabled for the system email account.

- A contact record on Exchange Server may have no country specified. If that is the case, and if the **Conflict Resolution Priority** setting is set to *Acumatica* on the *Exchange Synchronization Policies (SM.20.40.10)* form for the applied policy, then the synchronized contacts are assigned the branch country specified in the default branch for the user. Alternatively, the synchronized contacts can be assigned the default country, if one is specified for the branch.

- If an employee's email address has been changed on the *Employee (EP.20.30.00)*, *Contact (CR.30.20.00)*, or *User Profile (SM.20.30.10)* form, it also changes in Exchange after synchronization.

- After synchronization, tasks that have the *Canceled* status in Acumatica ERP now have the *Completed* status in Exchange. Previously, such tasks were transferred to Exchange as deferred tasks.

For details about the integration of Acumatica ERP with Exchange Server, see the Email>Synchronizing with Microsoft Exchange Server chapter in the User Guide.

Workflow and User Interface Changes

The following changes have been implemented that affect the process of synchronization policy configuration.

Form	Change
Exchange Synchronization Policies (SM.20.40.10)	The **Conflict Resolution Priority** box has been added to the form. This setting determines the way conflicts are resolved during a bidirectional synchronization, and it applies to contacts, tasks, events, and contact activities that have been updated since the previous synchronization

Form	Change
	in Exchange Server or in Acumatica ERP (or in both systems). The following options are available: • *Acumatica*: The record from Acumatica ERP overwrites the corresponding record in Exchange Server. • *Exchange*: The record from Exchange Server overwrites the corresponding record in Acumatica ERP. • *Last Updated*: The updated record (or, if both records have been updated, the record updated most recently) overwrites the older record. • *Keep Both*: Both records are kept and synchronized. A duplicate of the record is created in Acumatica ERP before the records are synchronized. After the synchronization, the original record in Acumatica ERP is overwritten with the corresponding record from Exchange Server, and a new record is created on Exchange Server that corresponds to the duplicate.
Exchange Synchronization Policies (SM.20.40.10)	The **Use Hyperlink to Acumatica Contact as Web Page Address** check box has been added on the **Synchronization Settings** tab of this form. If this check box is selected, then during synchronization, a hyperlink to the contact record in Acumatica ERP is inserted in the **Web Page Address** box for the corresponding contact on Exchange Server. If the **External Link Template** box on the same tab is blank, the hyperlink is identical to the URL that you can view if you select the contact on the *Contacts (CR.30.20.00)* form and click **Help** > **Get Link** on the form title bar; otherwise, the system uses the same URL, but replaces the protocol and the hostname with those specified in the **External Link Template** box.
Incoming (CO.40.90.00), *Outgoing (CO.40.90.20)*, *Sent (CO.40.90.80)*, *Deleted (CO.40.90.90)*, *Draft (CO.40.90.10)*, *Archived (CO.40.90.30)*	Now the **Related Entity Description** column on these forms contains hyperlinks that you can click to open the entry form for the related record in a new window.

Extended Mobile Application

The Acumatica mobile app is an out-of-the-box solution that empowers your employees to access Acumatica ERP from mobile devices to enter and submit their expenses and manage their work documents. The mobile application includes *applets*, which are versions of Acumatica ERP data entry forms that have been tailored to mobile devices.

The Acumatica mobile app is available for iOS and Android mobile devices. The mobile app provides real-time access to your Acumatica ERP instance and supports automatic data synchronization.

The functionality of the Acumatica mobile app has been significantly extended for Version 5.3.

Support of Multiple Companies and Branches

In previous versions of the app, on signing in, the user accessed the default branch to which this user had access rights. If the user had access rights to multiple branches and companies, this user was not able to switch the branch or company.

In Version 5.3, once the user is successfully signed in, the user can view the branch and company if multiple companies have been configured in the Acumatica ERP instance. If the user has access rights to multiple branches and companies, this user can select another branch or company to sign in to. The user also will be able to specify the branches for documents and transactions.

More Applets

The Acumatica mobile application includes new applets for the following Acumatica ERP forms:

- *Business Accounts (CR.30.30.00)*
- *Projects (PM.30.10.00)*
- *Project Tasks (PM.30.20.00)*
- *Equipment Time Cards (EP.40.70.00)*
- *Transactions (CA.30.40.00)*
- *Sales Orders (SO.30.10.00)*
- *Purchase Orders (PO.30.10.00)*
- *Purchase Receipts (PO.30.20.00)*
- *Requests (RQ.30.10.00)*
- *Requisitions (RQ.30.20.00)*

With the extended functionality of the Acumatica mobile application, users can do the following:

- Add prospective customers, create opportunities for contacts and prospects, and enter sales orders
- View and create projects and project tasks, and specify billable time for equipment used for projects
- Add and release cash transactions
- Create requests, requisitions, and purchase orders and submit these documents for approval
- Create purchase receipts and assign them to the appropriate employees for processing

To improve navigation, the lists of default favorites (that is, the applets that are used most frequently) were added to the mobile application on both platforms, iOS and Android.

Documentation for the Acumatica Mobile Application

The Acumatica ERP User Guide now includes the Acumatica Mobile App part, which is available online and as a PDF. The documentation covers most of the applets and will be extended with each update to cover the remaining applets (Projects, Project Tasks, Equipment Time Cards, Requests, and Requisitions).

Workflow Changes

The following changes have been implemented to address issues raised by customers.

Organization Suite

Area/Form	Change	Issue
Email Activity (CR.30.60.15)	The **Insert**>**Template** action has been removed from the Rich Text Editor. The user can instead click **Actions**>**Select Source** on the form toolbar.	**AC-56890**
Opportunities (CR.30.40.00)	Now the **Discount** box can be used for informational purposes only; if a discount is specified, it is no longer transferred to the invoice or sales order. To apply manual discounts to invoices or sales orders created from an opportunity with a discount, the user needs to manually insert lines with negative amounts or manually specify line discounts.	**AC-59456**
Opportunities (CR.30.40.00)	Now an opportunity's tax zone has one of the following default values (listed in the order of selection priority): the tax zone specified for the selected location, the tax zone specified for the default location of the selected business account, or the tax zone of the selling branch.	**AC-59828**
Activity (CR.30.60.10)	More types of records are now available for selection in the **Related Entity** box (including *Receipt*, *GL Batch*, and *Shipment*).	**AC-59843**
Customer Management Preferences (CR.10.10.00)	The **Require Unique Email Address on Contact Validation** check box has been added to the **Duplicate Validation Settings** tab. If this check box is selected, the system discards duplicates with non-unique email addresses upon verification.	**AC-60812**

Finance Suite

Area/Form	Change	Issue ID
AR Aged Past Due (AR.63.10.00) *AR Aged Past Due MC (AR.63.11.00)* *AR Aged Outstanding (AR.63.15.00)* *AR Aged Outstanding MC (AR.63.16.00)*	Now with the **Age Credits** check box cleared on the Accounts Receivable Preferences (AR.10.10.00) form, the value in the **Aging Date** box of the applicable report form will be printed in the **Due Date** column of the applicable report for unapplied credit memos and payments.	**AC-51820**
Journal Transactions (GL.30.10.00)	The **Require Ref. Numbers for GL Documents with Taxes** check box has been added to the *General Ledger Preferences (GL.10.20.00)* form. If the check box is selected, the document reference number (the **Ref.**	**AC-55246**

Area/Form	Change	Issue ID
	Number column) is required when you add tax-related journal transactions.	
Release Payments (AP.50.52.00)	Now the *Quick Checks (AP.30.40.00)* form opens when you click the reference number of a quick check.	**AC-55453**
Account Details (GL.40.40.00) *Check Register (CA.30.30.00)* *Commission Details (AR.40.30.00)* *Payment Processing Log (AR.40.65.00)* *Payment Method Transaction History (AR.40.60.00)* *Post Taxes (TX.50.15.00)*	On the toolbars of the listed forms, there had been buttons (such as **View Document** or **View Customer**) that had to be used to open and view a record selected in the table. Now the reference numbers of records in the tables of the listed forms work as hyperlinks, which you can click to open and view record details. The corresponding buttons were removed from the form toolbars.	**AC-56385**
CA Edit (CA.61.20.00) *CA Edit Detailed (CA.61.25.00)*	The **Include Transactions on Hold** check box has been added to include transactions with the *On Hold* status in these reports.	**AC-62511**
Trial Balance (GL.30.30.10)	You can now import a trial balance in a reporting ledger whose currency differs from the base one.	**AC-57460**
Tax Adjustments (TX.30.10.00)	Tax adjustments could not be released if they were saved to a tax period for which the tax report had been voided afterward and prepared again.	**AC-58975**
Create E-File (AP.50.75.00) *1099 MISC Form (AP.65.30.00)*	In the **Branch** box on these forms, a user is able to select the consolidation branch (**Consol. Branch**) assigned to the company posting ledger. In this case, the data summarized for all the branches that post to the ledger will be reported under the consolidation branch company.	**AC-62677**

Distribution Suite

Area/Form	Change	Issue ID
Item Warehouse Details (IN.20.45.00)	The new **Override Inventory Account/Sub** check box was added to the **GL Accounts** section on the **General Settings** tab of the form. If the check box is selected, the system uses the inventory account and subaccount from the item warehouse settings. Otherwise, the system uses the inventory account and subaccount from the source that is selected in the settings for the posting class, which are specified on the *Posting Classes (IN206000)* form. The check box is cleared by default if the *Multiple Warehouses* or *Multiple Warehouse Locations* features are not enabled.	**AC-57336**
Inventory Summary (IN.40.10.00)	The new plan *SO Prepared* was added. All sales orders with statuses of *On Hold*, *Credit Hold*, or *Pending Approval* are included in this plan. It is possible to set up the availability	**AC-60153**

Area/Form	Change	Issue ID
Inventory Allocation Details (IN.40.20.00)	calculation policy for the status on the *Item Classes (IN.20.10.00)* form.	

Configuration and System Suites

Area/Form	Change	Issue ID
Mass-processing forms	Any filters applied to columns and tabs are reset after the mass processing of records is complete.	**AC-46376**
Favorites list	It is forbidden to add to favorites list a generic inquiry that has not been added to the site map.	**AC-47841**
The **Schedules** menu on the mass-processing forms	The **History** and **View** menu commands are disabled if there are no schedules for the form.	**AC-50887**
System Email Accounts (SM.20.40.02)	If a user selects the *IMAP* option in the **Incoming Mail Protocol** box, the system displays the **Root Folder (on server)** box marked as mandatory; otherwise, the **Root Folder (on server)** box is hidden.	**AC-57099**
Mailing configuration settings	The *Text* option has been removed from the list of supported email formats.	**AC-62341**
Notification Templates (SM.20.40.04)	The **Status** box has been removed from this form because it is obsolete.	**AC-52705**
Signing in	When the `secureCompanyID` option is enabled, via SSO, the user logs in to the first company where SSO is enabled if the user exists in that company.	**AC-51096**

User Interface Changes

The following changes have been implemented to improve system usability.

Renaming of Interface Elements

Area/Form	Change	Issue ID
Release Tax Report (TX.50.20.00)	The **Close Period** button has been renamed to **Release** because it had a confusing name. The functionality of this button includes not only closing the period but also generating a bill for the tax agency.	**AC-56860**
Leads (CR.30.10.00)	The lead status has been renamed from *Closed* to *Lost*. This change may affect some integration scenarios.	**AC-54425**

Usability Improvements

Area/Form	Change	Issue
Time reporting in activities and time cards	Now a user can enter one digit, *1* or *2*, to specify the number of hours when reporting time in activities and time cards. However, the user has to skip the next digit place to specify minutes in the same row.	**AC-53435**
Case Classes (CR.20.60.00)	The format of the control for entering a reaction time for cases with a particular severity level has been changed to 000 d 00 h 00 m, and empty digital places are now filled with zeroes. However, the user should still be careful not to enter, for instance, 500 days if the intended timeframe is 5 days.	**AC-54900**
Account Details (GL.40.40.00)	The number of characters that can be added to the **Transaction Description** box has been increased to 256.	**AC-57446**
Trial Balance (GL.30.30.10)	Now you can import a trial balance into a reporting ledger whose currency differs from the base one.	**AC-57460**
Documents (SP.40.20.00)	The **Customer** column has been added to identify the customer account.	**AC-58232**
Invoices and Memos (AR.30.10.00)	Up to 50 characters can now be entered in the **Apartment** and **Real estate** boxes on the **RUT/ROT Details** tab. Unicode support has been also added.	**AC-60789**
Dashboards	Dashboard usability does not depend on the zoom level set for the Chrome browser.	**AC-46961**
User menu (located in the upper-right corner of the screen)	The **Sign Out** button has been moved to the beginning of the menu options list.	**AC-59244**

Performance Improvements

The system performance has been significantly improved in the following areas:

Area/Form	Change	Issue ID
Generic Inquiry (SM.20.80.00)	The server time for copying a generic inquiry has been reduced by 80%.	**AC-46356**
Dashboards	Performance has been improved during the loading of widgets on dashboards, especially for instances with large databases. The number of SQL requests has been reduced by more than 25%, and the CPU time has been reduced twice (measured on large sample data sets). If an error occurs during the loading of a widget, the error message is displayed within the widget area and doesn't cause an error on the entire dashboard.	**AC-57900**
Customization Projects (SM.20.45.05)	Performance has been improved during publishing customizations that include multiple database tables. The database script publication process is now 10 times faster. The progress log is now displayed during the execution of database scripts, which prevents the request from timing out. The following optimizations have been made: The system now avoids execution of the same script twice on the same database unless it is explicitly demanded, the site map and table schema update has been optimized, and multi-company publication of scripts has been optimized.	**AC-60852**
Bank Deposits (CA.30.50.00)	The **Add Payment to Deposit** pop-up window now opens approximately ten times faster than it did previously, including instances with a lot of records in the database.	**AC-54865**
Journal Vouchers (GL.30.40.00)	The performance of importing records on this form has been improved significantly, including cases when the **Reuse reference numbers in Journal Vouchers** check box was selected on *General Ledger Preferences (GL.10.20.00)* form and a user imports a large number of records. Records are now imported approximately 20 times faster than they were previously.	**AC-57390**

Other Fixes

Organization

AC-21927: After a workgroup name had been updated in the company tree, the workgroup name was not updated in assignment and approval maps.

AC-55340: Mobile Application did not allow users to enter fractured time in time cards and activities.

AC-55544: An attribute could be deleted even if it was in use.

AC-59380: Some forms, such as *Checks and Payments (AP.30.20.00)* and *Customer Payment Methods (AR.30.30.10)*, were available for selection through the entity selector on the *Assignment and Approval Maps (EP.20.50.00)* form, even though these forms were unrelated to any assignment or approval process.

AC-59459: If a unit price had been manually entered for a product on the **Products** tab of the *Opportunities (CR.30.40.00)* form, this price was reset if a user changed the product quantity.

Fix Description: Now the system does not reset a manually entered unit price when the product quantity is changed. However, a unit price is reset and updated in accordance with the volume pricing if the product's unit of measure is changed.

AC-59839: Clicking the Edit button next to the **Business Account** box on the *Opportunities (CR.30.40.00)* form redirected the user to the *Customers (AR.30.30.00)* or *Vendors (AP.30.30.00)* form instead of the *Business Accounts (CR.30.30.00)* form.

AC-60221: For a business account with the *Prospect* type, a location of an incorrect type (for instance, a customer location) was set as the default location, which resulted in incorrect redirection when lookup buttons were used; also, the prospect's location could not be updated further.

AC-61270: Any activity associated with a purchase order, if it was created on the *Purchase Orders (PO.30.10.00)* form, had an incorrect value in the **Related Entity Description** box.

Fix Description: Now the related entity description for purchase order-related activities consists of the purchase order type and the order number.

AC-62205: If a user created a business account through the UI, the system did not create a record in the `Note` table.

Fix Description: A note reference is now created only after an activity has been associated with the entity. The functionality of import by scenario supports this behavior.

AC-63552: A user could not add a new comment to a case by using the Self-Service Portal because the text field for specifying the comment details was too small.

Finance

AC-38229: For a debit adjustment opened on the *Bills and Adjustments (AP.30.10.00)* form, applications were not listed on the **Applications** tab.

AC-47483: Exporting the *Customer Statement (AR.64.15.00)* report to Excel creates a file whose data cannot be used.

Fix Description: The columns of the Excel file generated by the exporting process from the *Customer Statement (AR.64.15.00)* report are now adjusted.

AC-53205: Files and notes attached to the detail lines on the *Journal Vouchers (GL.30.40.00)* form were not transferred to generated documents.

Fix Description: The files and notes attached to detail lines, including split lines, on the *Journal Vouchers (GL.30.40.00)* form are now transferred to the generated documents of all types.

AC-54849: On the *Convert Purchases to Assets (FA.50.45.00)* form, the *Object reference not set to an instance of an object* error was shown if the depreciation book assigned to the selected fixed asset class had no financial periods generated for the default transaction date (**Tran. Date**).

Fix Description: The error message is now improved. It describes the nature of the problem and gives directions for resolving it.

AC-55671: Four decimal places were shown in the **Amount** and **Balance** columns in the list of documents to apply on the *Process Bank Transactions (CA.30.60.00)* form.

AC-55851: On the *Reporting Settings (TX.20.51.00)* form, **Detail by Tax Zones** could not be selected for a report line after a previous failed attempt to save the line with **Tax Box Number** and the **Detail by Tax Zones** check box selected.

AC-56156: Changing the value in the **Setup Item** box for a contract item on the *Contract Items (CT.20.10.00)* form could cause inconsistencies in existing contracts.

AC-57689: Documents with the *Scheduled* status were displayed as having the *Balanced* status on the *AR Edit (AR.61.10.00)* report.

AC-60853: The elements of an obsolete report that is not available in the UI anymore were collected by the translation process on the *Translation Dictionaries (SM.20.05.40)* form.

Fix Description: The `CA610500.rpx` file related to the obsolete *Adjustment Edit* report has been removed.

AC-62217: The *Tax Details (TX.62.05.00)* report included tax transactions that were unreleased, voided, or suspended.

Distribution

AC-52428: The minimum markup verification was performed incorrectly for the sales orders in a foreign currency.

AC-57412: If no sales order was selected for a shipment in the **Add Sales Order** dialog box opened from the *Shipments (SO.30.20.00)* form and the user clicked **Add & Close** to close the dialog box, no order lines were added to the shipment but the shipment was linked to the order anyway, and the order status changed to *Shipping*, which resulted in errors.

AC-57061: On the *Invoices (SO.30.30.00)* form, the **Add Order** button worked incorrectly: It disappeared in the **Add Order** dialog box after a user had deleted a line from the invoice.

AC-58407: In specific circumstances, if a payment and shipment were created from the *Sales Orders (SO.30.10.00)* form, the system displayed the error: *Error #90: Another process has updated 'SOOrder' record. Your changes will be lost.*

AC-59254: If the unit price was not specified on the sales order line, the system deduced the price from the **Ext Price** and **Qty** to calculate the transaction amount for the invoice when a partial shipment was involved.

Configuration

AC-59640: The *View Only* access rights granted to a user for a top node (that is, for a particular suite) by using the *Access Rights by Role (SM.20.10.25)* form did not propagate to the child nodes.

System and Platform

AC-46486: A user couldn't reset the password during a temporary lockout due to the user reaching the specified limit of failed login attempts.

AC-47003: The name of the column that can be used to select all records on a processing form could not be translated through the *Transaction Dictionaries (SM.20.05.40)* form.

AC-48930: It was impossible to manage (update or delete) filters on the *Filters (CS.20.90.10)* form that had been created on selector lookups—for example, on the **Vendor ID** selector of the *Vendors (AP.30.30.00)* form.

AC-49249: On the *Data Providers (SM.20.60.15)* form, the **Save** button was not available after a source object or a source field had been deleted on the **Schema** tab.

AC-54032: If the web service definition (screen-based WSDL) had been generated in any company other than the first company created on an application instance, the web reference could not be added to a Visual Studio project.

AC-54315: Under some conditions, the wrong value could be displayed for a custom field after the user had signed out and signed back in to the system.

AC-54826: A universal search could not find a form if a list was set as the entry point for the form.

AC-54923: Customizing data views of the `PXProcessing` and `PXFilteredProcessing` types resulted in a `NullReferenceException` exception being thrown when a user clicked the **Process** or **Process All** button on a processing form.

AC-55310: Wrong emails could be saved through a web service API call because email validation worked differently in the user interface and the web service API.

AC-55363: The code of the Customization plug-in was not executed if the `UseRuntimeCompiliation` option was disabled in web.config.

AC-56789: The system did not throw an error when a user attempted to save a generic inquiry that was using columns of a table that had been deleted from the **Tables** tab.

AC-57497: On the Expense Receipt mobile screen, the default `X` project code was not populated in the **Project** box.

AC-57697: The system did not properly update an AR invoice line via a web service API call.

AC-58880: The iOS application could crash on an attempt to display an error message.

AC-59236: Panels from report forms were not exported to Excel in manual mode.

AC-59474: On the Process Invoices and Memos (SO.50.50.00) form, the invoice statuses were being changed back and forth during the release operation.

AC-59480: With the `X-Content-Type-Options:nosniff` option enabled in IIS, the **Publish Customization** window did not work in Chrome, Internet Explorer, or Edge.

AC-59529: Users could not delete customer records from the *Customers (AR.30.30.00)* form by using the mass deletion operation in a generic inquiry for customers.

AC-59786: In the Layout Editor of the customization frameset, *The 'DataMember' property cannot be set declaratively* error appeared once the `DataMember` property was specified for a `PXGrid` control.

AC-60117: **Write-Off Limit** could not be updated on the *Customers (AR.30.30.00)* form by using the mass update operation in a generic inquiry for customers.

AC-60923: Notes and attachments could not be saved once they were added through the following processing forms: *Release AR Documents (AR.50.10.00)*, *Print Invoices and Memos (AR.50.80.00)*, *Print/Email Purchase Orders (PO.50.30.00)*, *Process Orders (SO.50.10.00)*, *Process Shipments (SO.50.30.00)*, and *Process Invoices and Memos (SO.50.50.00)*.

AC-61317: The term *Filter by this cell value (Shift+F)*, which is available in the context menu, could not be translated.

AC-61562: Security settings did not work for some fields—in particular, for the cost statistics information on the *Stock Items (IN.20.25.00)* form.

AC-61782: The *Business Date* label could not be translated in Analytical Reports.

AC-61864: The *Format* label could not be translated in Analytical Reports.

AC-49138: It was not possible to copy a new automation definition by using the **Copy Details** button on the *Automation Definitions (SM.20.50.10)* form.

AC-60007: Multiple labels could not be translated due to being hard-coded.

AC-60012: Publishing a customization project containing localizations timed out after 4 to 5 minutes.

AC-61482: The `FULL JOIN` condition did not work in reports and generic inquires.

AC-62136: `SearchableAttribute.cs` was not available in the Acumatica Shared Source Code repository.

AC-62211: Installer, when run on a 64-bit system, created an incorrect `system.webServer/handlers` section.

AC-62326: Publishing a project with an import scenario for the second time might cause the following error message to be displayed: *Violation of PRIMARY KEY constraint 'SYProviderField_PK'*.

AC-62560: `UI State` of a dialog box was kept after it was closed.

Documentation

AC-28478: The description of the GetDescription() function used in ARM reports was not complete.

AC-58640: The description of the **Create New** button located on the *Customer Payment Methods (AR.30.30.10)* form was absent.

AC-63233: The description of the *Monitoring and Automation* feature incorrectly stated its availability for Acumatica ERP editions.

Fix Description: The description has been changed to notify customers that the feature is not available in the standard edition of Acumatica ERP, as was stated previously.