Acumatica Announces Acumatica 2017 R2

Product News from Acumatica Cloud ERP

We are thrilled to make three major product announcements in September 2017:

- Acumatica 2017 R2 Release

- Acumatica Manufacturing Edition

More Integrations with Partners

Acumatica 2017 R2 Release

This fall release is the scheduled update to Acumatica 2017 R1 (previously known as 6.1), which was released in February 2017.
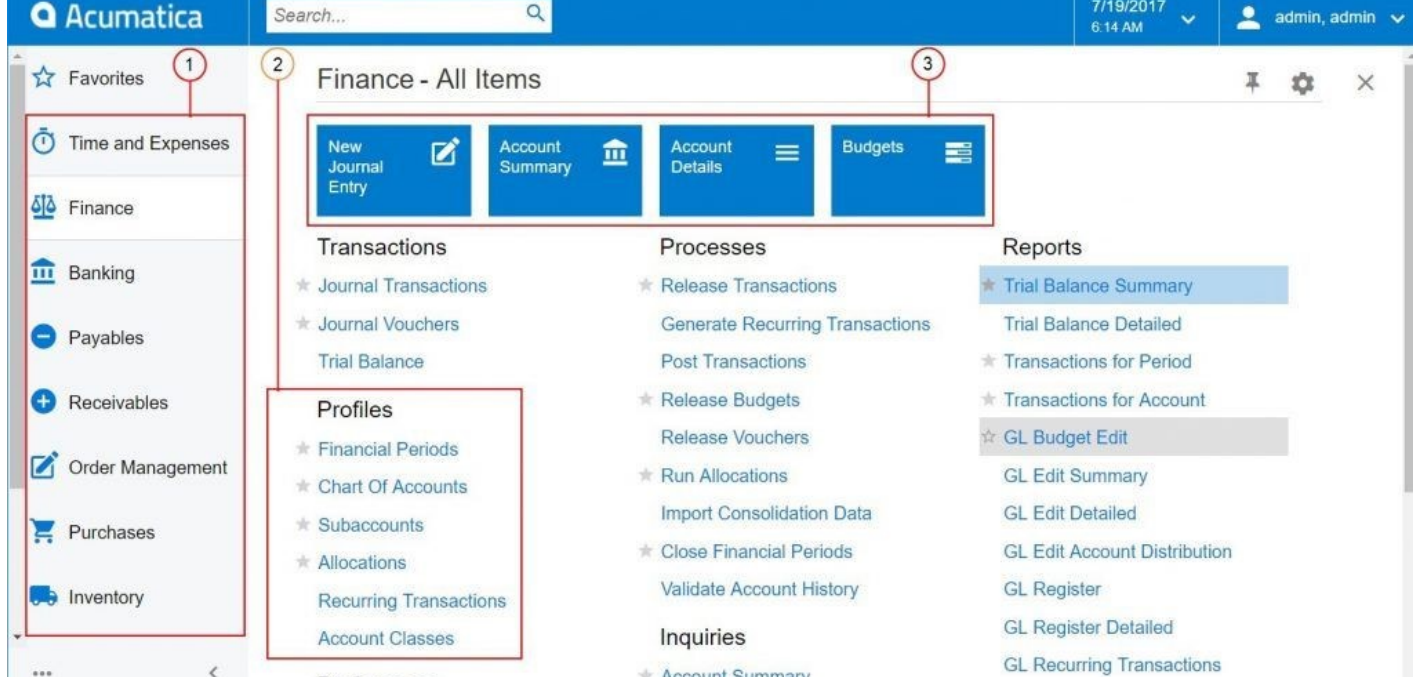
Acumatica 2017 R2 release was developed around the pillars of "Insights," "Productivity," and "Technology." Here are descriptions of each pillar.

Insights

New User Interface

At the center of Acumatica 2017 R2 is a new, more flexible and personalized user interface. In addition to using workspaces that supplement the traditional suites and modules, you can tailor your navigation for preferred processes and individual tendencies. You now have greater control over personalized dashboards and can create role-defined views from preconfigured templates.

Based on your company's specific business processes, you can flexibly configure navigation. Personalized navigation helps you easily access forms you use frequently. In the new user interface, suites and modules are replaced with workspaces. A workspace includes forms and reports consolidated for a specific function.

1. Navigation pane with workspaces

2. Links to forms

3. Tiles (links with additional parameters to forms)

The Administrator can configure navigation in the new user interface, pin and unpin workspaces on the navigation pane, add and remove links to forms and reports in a workspace, and manage tiles in a workspace. Every user can personalize the user interface by adding forms to Favorites and configuring Quick Menu items.

Reporting Enhancements

You can create your own custom online reports using the Acumatica Generic Inquiries functionality. This query tool can display exactly the set of data you need, provided you have the appropriate level of security to view it. You can see tables and field names, easily join the data together, and then apply filtering, sorting, and grouping options. Acumatica also supports the Microsoft Power BI online analytics tool.

With this release, pivot tables can now aggregate data for very specific periods of time, such as one month. Administrators can set the default column configuration for all users or configure table layouts for a subset of users at any time. The Administrator configures the required table layout, including specific columns and order of columns to be displayed.

Productivity

Acumatica 2017 R2 release includes enhancements to almost every product suite, including Customer Management, Financial Management, Distribution Management, Project Accounting, and Field Service Edition. Here are highlights of the changes:

CRM:

The enhancements to Acumatica CRM focus on marketing. We've improved marketing lists and campaigns for greater user efficiency in marketing tracking and analysis. This includes improvements to List Building where generic inquiry forms work with contact records. We've also enhanced both dynamic and static marketing lists.

For Lead Tracking, the previous "statuses" have been enhanced to "stages" (prospect through deploy). You can now create activities associated with campaigns. The system will associate a new lead with its marketing campaign.

For companies that use Salesforce CRM as their primary CRM system, Acumatica has a tool to allow bi-directional real-time synchronization between Acumatica ERP and Salesforce CRM.

Learn more: https://www.acumatica.com/cloud-erp-software/customer-management/

Financial Management:

Acumatica 2017 R2 includes significant enhancements to Customer Statement Processing. Also, multiple branches that use the same Acumatica tenant can configure separate tax periods and close the periods independently of one another.

For Outgoing Cash Transactions, the approval process in Accounts Payable and Accounts Receivable now lets you purchase goods or services from one vendor and pay for those going to a different vendor.

For companies that use Authorize.Net, a new API plug-in provides PCI DSS-compliant integration with Authorize.Net. Sensitive credit card information is not stored in the Acumatica ERP database.

Learn more: https://www.acumatica.com/cloud-erp-software/financial-management/

Distribution Management:

Acumatica Distribution Management includes changes in Unit of Measure and Pricing.

For the Item Class Hierarchy, Acumatica now supports item classes using a tree-like hierarchy with parent-child relationships. You can also define the default class for stock and non-stock items.

New Unit of Measure (UoM) functionality includes the new feature that while creating a sales order, the user can specify inventory items by their alternate IDs. If the default item's UoM is different from the alternate item's UoM, the alternate's UoM will be used.

You can specify sales and purchasing prices by warehouse and alternate IDs. The Price Adjustment can now update prices for other units of measure automatically.

Learn more: https://www.acumatica.com/industries/wholesale-distribution/

Project Accounting:

Acumatica Project Accounting also features numerous enhancements, beginning with simplified budget structure and reporting.

We've enhanced project billing with Proforma invoices and Project-Specific Invoice Formats. We've also added progress billing on fixed amount and time and material contracts. Enhanced project rates allow you to bill a project by prices that are defined in the Accounts Receivable sales price lists, including foreign currency prices.

For project costing, the system will now track project comments through purchasing, sales, and external systems.

Learn more: https://www.acumatica.com/cloud-erp-software/project-accounting/

Field Service Edition:

Acumatica ERP 2017 R2 provides enhancements in the Equipment Management module that will help you track components and warranties. When a piece of equipment is a stock item sold to a customer, and preventive maintenance or warranty handling (or both) is performed, these services are tracked in the system. Also, you can track any component that's a part of that equipment, including the component's separate warranty information, serial number, and preventive maintenance.

The Scheduling feature now lets you clone an appointment multiple times. You can also specify a default salesperson for service orders that require certain services. With the new Contracts functionality, you can generate Service Order appointments with a defined frequency and schedule start time.

The web mapping service within Field Services is now provided by Microsoft Bing Maps. This will allow Acumatica to accommodate additional functionality in the future.

There is also a major enhancement in mobility. See "Mobile GPS Framework" in the technology section below.

Learn more: https://www.acumatica.com/cloud-erp-software/field-service-management/

Technology

REST API and Swagger

Acumatica has further enhanced its REST APIs and announced the availability of Open API 2.0 specification (formerly known as Swagger Specification) for Acumatica Contract-Based APIs. Swagger is the world's largest framework of API developer tools for the OpenAPI Specification (OAS). It enables development across the entire API lifecycle—from design and documentation to testing and deployment. Applications implemented based on OpenAPI interface files can automatically generate documentation of methods, parameters, and models. This helps keep the documentation, client libraries, and source code in sync.

Mobile GPS Framework

Acumatica 2017 R2 includes the new GPS location framework for mobile applications. For example, Field Service Edition provides GPS location tracking. This new feature allows you to record the exact location of your service technicians, at the time they started and completed each appointment and route. You can click the "View On Map" button for each location to open the Google Map link with the exact address.

Push Notifications Sent by Acumatica ERP

External applications that worked with data in previous versions of Acumatica ERP needed to continually poll for the data to find out whether there were any changes. This could slow down the performance of the external application. In Acumatica ERP 2017 R2, external applications can track data changes by processing push notifications sent by Acumatica ERP.

Localization of Acumatica Self-Service Portals in Multiple Languages

Acumatica has extended its multilanguage support to include self-service portals. A self-service portal can be localized in the application interface, through user input boxes, or through translation of wiki articles.

New Industry Edition

Acumatica Manufacturing Edition, formally known as JAMS, is being released as part of Acumatica 2017 R2. This platform has been co-developed, implemented, and supported in partnership with JAAS Systems over the course of several years. Acumatica Manufacturing Edition is the latest fully integrated vertical solution from Acumatica, joining the Field Service Edition and eCommerce Edition solutions announced earlier in 2017.

Manufacturing Edition includes BOM and Routing Management, Production Management, and MRP (Material Requirements Planning). Optional applications include Estimating, Product Configurator, and APS (Advanced Planning and Scheduling). Because they're built on the Acumatica xRP platform, all the financial and distribution applications are integrated. For more information: https://www.acumatica.com/cloud-erp-software/manufacturing-management/

New Integrations with Partners

Adobe Sign

Adobe Sign makes it fast and easy for Acumatica users to securely sign and manage documents across devices from within Acumatica Cloud ERP. With Adobe Sign, you can prepare and send documents such as sales orders and contracts to be e-signed with a few clicks. Your customers sign and return it on any device, and each step is tracked from beginning to end.

Visual Resource Scheduling Integration with Smartsheet

Smartsheet is a popular project management tool used for visual resource scheduling. Like Acumatica, it is a fully cloud and mobile solution. In any new project you set up in Acumatica Project Accounting can automatically set up a new project in Smartsheet and populate it with the tasks and dates. As you make changes in the field, updates will be sent back to Acumatica Project Accounting.