

Tips & Tricks - Acumatica Inventory and Distribution

- 1) Keyboard Commands (find via universal search) - pulls up help Wiki
 - a) Alt-G: opens the menu
 - b) Ctrl-Q: jumps to the Universal Search
 - c) F3: lookup box (show
 - d) F4: grid/form view (show Sales Order screen)
- 2) User Profile > Homepage
 - a) Can set to a Dashboard, Transaction screen or Wiki
- 3) File Maintenance > Comment field (AALEGO500 example)
 - a) Versioning
- 4) Order Mgmt – Templates (SO006083), Add Items, show Line Details
- 5) Order Mgmt - Adding barcodes to printed reports (Shipment 003693 - Pick List SO644000).
 - a) Add PictureBox
 - b) Set Source to Barcode
 - c) Mime Type = image/bmp
 - d) Barcode Type = Code30
 - e) Value = [Customer.AcctName]
- 6) Order Mgmt - Import order rows via Excel (SO006044).
 - a) Export a sample first to Excel from Sales Order grid
 - b) Modify sheet
 - c) Upload/mapping update if necessary
- 7) Inventory & Order Mgmt – Attributes (Tab/Header)
 - a) Attributes will now flow to reports/inquiries
 - b) GI – “InventoryItems”
- 8) Inventory - Recalculate Inventory (use to be Validate Inventory Process)
 - a) Used whenever a change is made to the Availability Calculation screen under Item Classes
- 9) Inventory - Update from Inquiry
 - a) **CAUTION when doing this type of update**
 - b) “InventoryItemsMassUpdate”