



Acumatica

The Cloud ERP

Acumatica 2022 R2 FEATURE REVIEW

PCB | **PCBENNETTSOLUTIONS**
End To End Business Software

Acumatica 2022 R2



Power Work Forward
with Exceptional
Usability



Transcend Geographic
Boundaries



Target Micro-Vertical
Markets

Acumatica 2022 R2 – Executive Summary

The latest release of Acumatica includes some time-saving usability enhancements, along with a little something for every role that touches ERP. This deck outlines the key improvements by functional area. You can find more detail on each enhancement in the [full release notes](#). One of the reasons we love Acumatica is their commitment to product improvements, as evidenced by this comprehensive new release.

The team at PC Bennett was excited to see Acumatica execute on requests from customers like additional out-of-the-box dashboards, user guide improvements, support of OAuth 2.0 for Google Suite, profit margin calculations for service orders and appointments, improved processing of batch payments, bank feed integration, automatic notification of expense receipts, and an overall “flatter” user experience involving fewer clicks to accomplish your day-to-day tasks.

There’s a lot to unpack in 2022 R2, and we’re here to help you understand the highlights, and get the most from the release.

Acumatica 2022 R2 Highlights



Usability

- Wiki based info tips
- Mobile workspace configuration enhancements
- Predefined dashboards and side panels for CRM, manufacturing, and distribution



Technology

- Contract based API enhancements include payroll, distribution, finance, and commerce connector improvements, and more
- Mobile signature capture
- Acumatica as an identity provider
- Publish customizations to portal or ERP



Financials

- Approval of Journal Entries
- Dunning letter improvements and personalization
- Bank feeds in core
- GL anomaly detection enhancements*



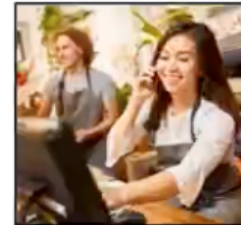
CRM and Payroll

- Change account on opportunities and quotes
- Marketing list management and templates*
- Link sales orders to opportunities and quotes
- Canadian payroll**
- Pay stubs on cell phones



Localization and Integration

- Company level localizations
- Portal payments
- Shipping integrations with on-the-fly box dimensions



Distribution and Retail-Commerce

- Inventory stock turnover KPIs
- Stock to non-stock conversion
- On-the-fly box dimensions
- Bidirectional Order Sync with Shopify
- AcuPOS – improve special orders and receipt formats



Manufacturing

- Engineering workbench
- MRP including transfer demand
- Time entry across multiple production orders
- Over-completion qty verification on operations



Construction, Project, and Field Service

- Unit-based project progress tracking
- Drawing logs and submittals on mobile devices
- Change order workflow and status enhancements
- Include skills in appointment scheduling optimization

* Experimental Feature
** Managed availability

Acumatica 2022 R2 Virtual Launch: Feature Review Topics

- Financials and Payroll
- CRM
- Integration and Localization
- Platform usability features
- Order management and inventory control
- Field service
- Retail-commerce
- Construction
- Manufacturing
- Platform technology





Finance: Virtual Launch Showcase Items

- ✓ Approval of journal entries
- ✓ Prevent creation of documents into far future
- ✓ Multiple base currency support, contracts, & dunning letters
- ✓ Dunning letter improvements
- ✓ Bank feeds integration to core
- ✓ GL anomaly detection improvements *

* Experimental feature

Finance: All Enhancements & Improvements



General Ledger

- Approval of GL Transactions
- Enhancements in GL Error Detection
- Approval of GL Transactions in the Mobile App
- Changes to the Selection of the Retained Earnings Account on the GL Preferences Form



Expenses

- Integration with Bank Feeds
- Expense Receipt Notifications and Generic Inquiry



Payments

- AP Debit Adjustments with Retainage
- Exclusion of Payments and Voided Payments from Open Item Statements
- Improved Processing of Batch Payments
- Additional ACH and ACHBA Payment Methods



Miscellaneous

- Changes in 1099 Boxes
- Improvements in the Straight-Line Depreciation Method
- Preventing Creation of Documents with Dates in the Distant Future
- Support of Multiple Base Currencies for Contracts



Receivables

- Automatic Assignment of the Tax Zone - Sales Orders and Invoices
- Dunning Level by Customer Class
- Inclusion of All Documents with Open Balances in Dunning Letters
- Modification of Dunning Fees During the Dunning Process
- Support of Multiple Base Currencies for the Dunning Process



Payroll Improvements

- ✓ Enhanced Conditions for Final Paycheck Release
- ✓ Improvements to the User Interface
- ✓ Pay Stubs in the Mobile App



Acumatica CRM

- ✓ Enhanced Marketing Lists & Campaigns
- ✓ Side Panels with Marketing Data for CRM Entities
- ✓ The Currency of Business Accounts & Related Entities
- ✓ Relations Between Sales Orders & Associated Entities
- ✓ Changes to the Length of Identifiers for CRM Entities
- ✓ Ability to Create a Contact in a Sales Quote
- ✓ Enhancements to the Changing of a Contact in CRM Entities, Project Quotes, & Sales Orders
- ✓ Extended Data in CRM Records – New Columns



Acumatica Integrations & Localizations

- ✓ Ability to Change the Dimensions of a Box, On-the-Fly
- ✓ Creation of a Shipping Manifest for the ShipEngine Carrier Service
- ✓ Enhancements to Integration with SendGrid
- ✓ Canadian Localization at the Company Level
- ✓ Support of BACS Standard 18 for Lloyds Bank



Acumatica Platform Usability

- ✓ Ability to Specify a Custom Title to Side Panels
- ✓ Ability to Generate GS1 EAN/UCC-128 Barcodes in the Report Designer
- ✓ Depreciation of MSMQ for Internal Notification Queues
- ✓ Improved Diagnostics for Business Events & Push Notifications
- ✓ Built-in Infotips



Acumatica Inventory & Order Management

- ✓ Calculation of Inventory Turnover
- ✓ Conversion of the Stock Status of the Item
- ✓ Selection of a Cost Layer Type for Inventory Transactions
- ✓ Side Panel Support
- ✓ Predefined Dashboards for Tracking Data & Processes
- ✓ Changes to the Copying Settings for Notes & Attachments



Acumatica Field Services



Appointment Schedule Optimization with Consideration of the Staff Members' Skills



Improved Titles Related to Total Amounts on the Service Orders & Appointment Forms



Profit Margin Calculation



Mobile App Improvements



Updating the Unit Cost of Non-Stock Items to Be Purchased



Acumatica Retail Commerce



Connection of a Store with a Custom Shopify App



Export of Sales Orders to Shopify



Enhanced Export of Product Availability Settings



Multiple Guest Customer Accounts



External Description in Synchronization Records



Acumatica Construction



Mobile App Enhancements – Drawing Logs & Submittals



Enhancements in Change Management:

- Cost-Only Change Requests
 - New Document Statuses
 - Updated Rules of Project Budget Calculations
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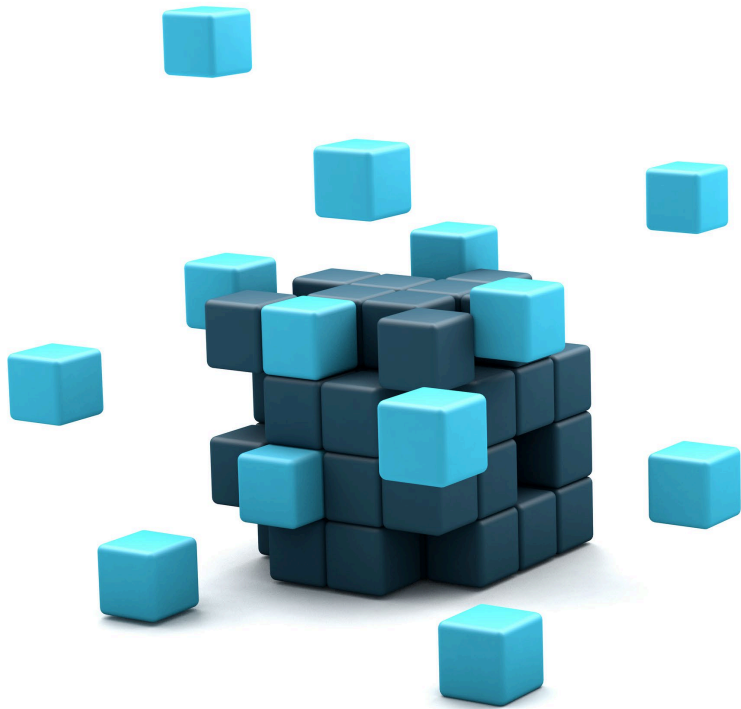


Track Project Progress by Unit



Acumatica Manufacturing

- ✓ Engineering Workbench
- ✓ Enhanced Support for Transfers in MRP
- ✓ Control of Excessive Item Quantity for Operations
- ✓ Restricted Visibility of Customers & Vendors
- ✓ Side Panel Support for Lists of Records
- ✓ Support of Blanket Sales Orders in MRP
- ✓ Management of the Initial Status for New BOM Revisions
- ✓ Enhanced Calculation of the Ship On Date for Transferred Materials



Acumatica Platform Technology

- ✓ Platform API Enhancements
- ✓ Web Services Enhancements
- ✓ Workflow Engine Enhancements
- ✓ Customization Enhancements



Acumatica Email & Mobile

- ✓ Support of Oauth2.0 for Google Suite
- ✓ Email Template Enhancements
- ✓ Mobile Ability to Edit the Home Screen
- ✓ Mobile Adjustment of Colors to Match the Company's Color Scheme

Questions about Acumatica 2022 R2?

LET US HELP.

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