

Release Notes

Acumatica ERP 5.2





Contents

Copyright.....	3
Introduction.....	4
New Features and Improvements to the Application.....	5
Finance and Distribution.....	5
Organization.....	7
Customer Portal.....	7
Platform Improvements.....	9
Mobile Improvements.....	11



Copyright

© 2015 Acumatica, Inc.
ALL RIGHTS RESERVED.

No part of this document may be reproduced, copied, or transmitted without the express prior consent of Acumatica, Inc.

4030 Lake Washington Blvd NE, Suite 100
Kirkland, WA 98033

Restricted Rights

The product is provided with restricted rights. Use, duplication, or disclosure by the United States Government is subject to restrictions as set forth in the applicable License and Services Agreement and in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 or subparagraphs (c)(1) and (c)(2) of the Commercial Computer Software-Restricted Rights at 48 CFR 52.227-19, as applicable.

Disclaimer

Acumatica, Inc. makes no representations or warranties with respect to the contents or use of this document, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Acumatica, Inc. reserves the right to revise this document and make changes in its content at any time, without obligation to notify any person or entity of such revisions or changes.

Trademarks

Acumatica is a registered trademark of Acumatica, Inc. All other product names and services herein are trademarks or service marks of their respective companies.

Software Version: 5.2

Last updated: July 24, 2015



Introduction

This document provides important information about changes and new features that are available in Acumatica ERP 5.2. 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 new demo company **RevisionTwo** that can be easily deployed 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.



New Features and Improvements to the Application

Acumatica ERP 5.2 includes multiple improvements to the modules in the Finance, Distribution, Organization, and Customer Portal suites.

Finance and Distribution

Consolidated Receivables

When your company deals with the customers that have multiple branches, locations, or franchises, you can now configure parent-child relationships between the multiple customer accounts to consolidate receivables.

You now have the ability to:

- View a consolidated balance of receivables for a parent account that includes the balances of multiple child accounts.
- Print consolidated statements for a parent account.
- Pay open documents of child accounts with payments, prepayments, and credit memos of their parent account.
- Delete any parent-child relationship at any time.

To use this functionality, you must enable the *Parent-Child Customer Relationship* feature on the [Enable/Disable Features](#) (CS.10.00.00) form.

For details, see [Parent-Child Relations](#) in the Acumatica ERP 5.2 User Guide.

Web Service Synchronizes Currency Exchange Rates

You quickly and accurately update the currency exchange rates by using the Open Exchange Rates API service. You can schedule this process for a specific currency and specify the adjustment percent, so that a currency rate will be automatically adjusted (increased or decreased) with respect to the rate received from the web service.

This is particularly useful if you are transacting in many different currencies. This service provides updates on the exchange fees for 165 currencies. This automated service is performed by setting up which currency rate type the system will apply.

This automated service is performed by setting up which currency rate type the system will apply. For details, see [Currency Rate Update](#) in the Acumatica ERP 5.2 User Guide.

Support of Inclusive VAT

Acumatica ERP 5.2 provides you with the functionality of validating the tax amounts in vendor documents that you enter into the system. As a result, you register the document (for example, a bill) that you received from your vendor. Then before entering amounts from the bill into the detail lines in Acumatica ERP you specify the tax calculation mode that the system should use during the validation process. This will depend on the amounts that a document contains in its detail lines: tax-inclusive (net) or tax-exclusive (gross). The default tax calculation mode can also be set in the vendor maintenance.

For details, see [Tax Amount Validation in Documents](#) in the Acumatica ERP 5.2 User Guide.



Ability to Write Off Amounts During Bank Transaction Processing

Now when you process imported bank transactions by using the [Process Bank Transactions](#) (CA.30.60.00) form, you can write off a specific amount during processing of a bank transaction.

This functionality is available if write-offs are enabled and configured in the system, as described in [Write-Off Setup](#). For details, see [Processing Imported Transactions](#) in the Acumatica ERP 5.2 User Guide.

Early Contract Renewal

Contract renewal and recurring billing processes are separated now, which allows users to renew a contract with the *Active* status and issue a renewal invoice. Renewal fee and prepaid recurring fee for the period after renewal are separate invoices.

For details on renewing contracts depending on their type, see [Contract Renewal](#) in the Acumatica ERP 5.2 User Guide.

New Methods of Calculating Overdue Charges

New methods of calculating overdue charges have been added. You can calculate charges on a prorated open balance, which can be useful with partial payments, and after closing outstanding documents.

Also, you now have the ability to set up an overdue fee, a minimum document amount, and a range of percent rates for the calculation charge amount. Outstanding documents, such as invoices in dispute, can be excluded from the overdue process by simply flagging that invoice.

To use this functionality, you must enable the *Overdue Charges* feature on the [Enable/Disable Features](#) (CS.10.00.00) form. For details, see [Overdue Charges](#) in the Acumatica ERP 5.2 User Guide.

Improved Reports and Inquiries for Fixed Assets

The Fixed Assets module has been improved by adding or improving reports and inquiry screen to simplify the reconciliation of fixed assets with the General Ledger transactions:

- [Account Balance by Assets](#) (FA.40.10.00)
- [Asset Balance by Accounts](#) (FA.40.30.00)
- [Asset Transaction History](#) (FA.40.40.00)
- [FA Balance by GL Account](#) (FA.64.30.00)

Physical Inventory Imported to Acumatica ERP

Easily upload the initial stock balances or the physical inventory count results from a Microsoft Excel file by using the [Physical Inventory Review](#) (IN.30.50.00) form.

For details, see [To Import the Count Data](#) in the Acumatica ERP 5.2 User Guide.

Invoices Sent by Email from the Sales Orders Module

You can now send invoices by email in a batch from the directly from the [Process Invoices and Memos](#)(SO.50.50.00) form in the Sales Orders module. The customer configuration must indicate that the invoices should be send by email.

Allocation of Purchase Price Variance to Inventory Value

You can now select how you want to process the purchase price variance amounts for stock items with the following valuation methods: *Average*, *FIFO*, or *Specific*. The variance (any difference between the unit purchase price on a receipt and the unit purchase price on the bill) can be used to update the inventory value or can be posted to the purchase price variance account.



Organization

Ability to Resend Failed Emails

To allow the system to automatically resend outgoing emails for which the processing has failed, you can use the **Automatic Resend Attempts** setting on the [Email Preferences](#) (SM.20.40.01) form. This setting defines the number of times that the scheduled processing is allowed to fail for an email before the email's status changes from *Pending Processing* to *Failed*.

Ability to Define Default Date Setting for Employee Time Activities

The **Default Date in Time Cards** setting on the [Employee Classes](#) (EP.20.20.00) form defines which date is to be specified by default for a new record that an employee of the class enters on the [Employee Time Activities](#) (EP.30.70.00) or [Employee Time Card](#) (EP.30.50.00) form. The available options include *Next Work Day* and *Last Day Entered*.

Ability to Add Activities to Projects in the *Planned* Status

You can add activities to projects and project tasks that have the *Planned* status by using the [Projects](#) (PM.30.10.00) and [Project Tasks](#) (PM.30.20.00) forms. For instance, you can now add project tasks during the project planning stage. However, any transactions generated for completed activities cannot be released until the project gets the *Active* status. This allows you to record time for a project that still is in the planning and budgeting stage, before it becomes an active project.

Customer Portal

Acumatica ERP 5.2 includes the following improvements to Acumatica Self-Service Portal:

- The default Welcome page has a fresh new look with easy access links in the form of buttons. This Welcome page can be slightly tailored or completely changed to fit your needs.
- Dashboards can now be added to Acumatica Self-Service Portal by the administrator.

🔄 Welcome to Company Portal

NEW
CASEBROWSE
OPEN CASESMY
DOCUMENTSMY
STATEMENTSBROWSE
CATALOGMY
ORDERSKNOWLEDGE
BASEEDIT
COMPANY INFO

Welcome to the Customer Portal!

The Customer Portal is a single solution that you use to more efficiently cooperate and communicate with us.

By using the Customer Portal, you can do the following:

- Get an instant view of financial information, such as contracts, documents and payments received, while tracking due dates and amounts due
- Submit new support cases and communicate with the support team on existing cases
- Search through the knowledge base and provide feedback
- View the product catalog and place orders online

Figure: Welcome Page

For details, see [Managing Self-Service Portal Home Page](#) in the Acumatica ERP 5.2 User Guide.

Platform Improvements

Acumatica Content Pack for Microsoft Power BI is now available

Microsoft Power BI enables anyone to get rapid, actionable insights from data, anywhere and at any time. Within minutes you'll see and experience your data in ways you never imagined were possible. Using natural language and simple drag-and-drop action, you can proactively monitor key metrics, spot real-time trends, and get critical alerts from personalized dashboards.

In their July Report, Nucleus Research wrote this about the Acumatica Content Pack: "By reducing clutter and consolidating multiple data sources under one user interface (UI), Nucleus expects the Power BI content pack will drive productivity growth for decision makers by seven to ten percent." Full post at [Nucleus Research](#).

When you connect your Acumatica Cloud ERP software with Microsoft Power BI, you can gain new insight and make fast, informed decisions. Track your opportunity pipeline, monitor the progress, and see leads move from opportunity to win! Share your dashboard to keep your team in the loop. Connect to what matters to you. Log in to [Microsoft Power BI](#) and use Acumatica credentials to connect to the [Acumatica Content pack](#).



Attention The Content Pack is only available with Acumatica Release 5.2 or higher.

Improved Request Profiler

Multiple improvements were made to the Request Profiler as follows:

- The request profiler now works in cluster mode. It can be started on all cluster nodes with a single click. The system will retrieve the profiler results from all nodes. Cluster node can be identified in the request profiler by GUID or by a custom identifier.
- All request parts are measured during request time, and there is a special column for the session storage time.
- All request types, including wiki and API, can be monitored.
- Stack traces can be collected with SQL commands to identify the SQL origin. Application exceptions and trace messages can be collected by request profiler as well.
- The *Auto TurnOff* feature can be disabled in the `web.config` file.
- The Request Start time is now displayed in UTC.
- You will get a warning about a long pre-fetch time for the database slots.

Relative Date Clauses

Date clauses have been made more flexible. In the Report Engine, ARM, Generic Inquires, and advanced filter option in grids you can now use the date-relative parameters that relate to the current date. This includes:

- *@Today*
- *@WeekStart* and *@WeekEnd*
- *@QuarterStart* and *@QuarterEnd*
- *@PeriodStart* and *@PeriodEnd*
- *@YearStart* and *@YearEnd*



To make this fully flexible, you can add or subtract days, weeks, or quarters to it. For example *@YearStart-1* would signify the start of the prior year. All the date-relative parameters use the date (in UTC) of the server used to run the Acumatica ERP instance as the current date.

Company Snapshot Process Improved

The snapshot creation and restoration processes have been improved and now include the schema information to ensure more thorough validation before snapshot restoration is performed.

Other Improvements

- You can now include Wiki pages and Web Services endpoints into customization projects.
- The system provides improved memory consumption when a single instance works with multiple databases.



Mobile Improvements

The Acumatica ERP mobile app supporting iOS and Android devices has the following improvements:

- New applets for Employee Time Card and Activity screens allow employees to easily report working hours on their mobile devices.
- The mobile framework has been extended to support pop-up panels, dialog boxes and segmented keys, allowing developers to mobile-enable a wider variety of screens.

For more information on Acumatica 5.2
Please Contact Us Today!



www.klearsystems.com
1 Orchard Road, Suite 215
Lake Forest, CA 92630
949-681-8135
info@klearsystems.com