

Contents

Copyright.....	3
Introduction.....	4
Installation and Upgrade Notes.....	5
Upgrade Procedure: Customizations.....	7
Upgrade Procedure: Breaking Changes.....	8
Organization: Approvals of Expense Receipts.....	10
Finance: Enhanced Recognition of Pending VAT.....	12
Distribution: Change of the Customer in Sales Orders.....	14
Distribution: Use of the Warehouse Shipper Address.....	15
Distribution: Partial Receipt of Two-Step Transfers.....	16
Platform: Enhanced Access Rights Management.....	17
Platform: EULA Acceptance.....	20
Platform: Integration with Power BI.....	21
Other Improvements.....	23

Copyright

© 2017 Acumatica, Inc.
ALL RIGHTS RESERVED.

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

11235 SE 6th, Suite 140
Bellevue, WA 98004

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. HubSpot is a registered trademark of HubSpot, Inc. Microsoft Exchange and Microsoft Exchange Server are registered trademarks of Microsoft Corporation. All other product names and services herein are trademarks or service marks of their respective companies.

Software Version: 6.1

Last updated: January 27, 2017

Introduction

This document provides important information about fixes, enhancements, and key features that are available in Acumatica ERP 6.1. 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 partners' portal.

Installation and Upgrade Notes

For a detailed description of the general procedure of updating Acumatica ERP, see [Updating Acumatica ERP](#).

We strongly recommend that before you update to a newer product version, you back up all configuration files and databases used by the application instances. An upgrade to Acumatica ERP 6.1 from previous major versions (such as 5.3) may cause issues with customizations and dashboards.

Dashboards that were created in previous major versions of Acumatica ERP will be converted into the new format during upgrade. We recommend that you check all dashboards after upgrade and adjust them according to your needs. If you upgrade your Acumatica ERP instance from Version 6, dashboards will be upgraded smoothly.

Multiple changes have been made in Acumatica ERP 6.1 in comparison to Version 6 that may affect customizations and integrations. For details, see [Upgrade Procedure: Customizations](#).

If your Acumatica ERP instance was integrated with software provided by an independent software vendor (ISV) partners, we recommend that you consult with your partner about the compatibility of their products with Acumatica ERP 6.1.

Upgrade Policy

On the *Apply Updates (SM203510)* form, only minor updates for your current version of Acumatica ERP are available. You should upgrade your Acumatica ERP from previous major versions of the system to Version 6.1 manually on the server (upgrade by using the web interface is not supported due to significant changes in customizations).

Upgrade Notes

Upgrade to Acumatica ERP 6.1 must be performed as described in the table below. The upgrade process differs depending on the version from which you are upgrading.



: Acumatica ERP 6.1 supports only Integrated mode of the Internet Information Services application pool. Classic mode is not supported. Before starting the upgrade, switch the application pool to Integrated mode. Otherwise, the upgrade will not be performed, and a corresponding error message will be displayed.

From Version	Upgrade Path
6	Direct upgrade to Acumatica ERP 6.1 is supported.
5.0 and later	Direct upgrade to Acumatica ERP 6.1 is supported.
4.2 (4.20.1036 and later)	Incremental upgrade is required. The following steps must be performed in the listed order: <ol style="list-style-type: none"> 1. Upgrade to the latest 5.3X build available. 2. Upgrade to Version 6.1.
4.2 (before 4.20.1036)	Incremental upgrade is required. The following steps must be performed in the listed order: <ol style="list-style-type: none"> 1. Upgrade to Version 4.20.1036. 2. Upgrade to the latest 5.3X build available. 3. Upgrade to Version 6.1.



: You cannot upgrade from Acumatica ERP 5.3X to Acumatica ERP 6.1 if your build of Acumatica ERP 5.3X was released later than the build of Acumatica ERP 6.1 you are going to upgrade because in this case some Acumatica ERP 5.3X fixes might not be included in Version 6.1.

Known Issues

You can find the actual list of known issues on the Acumatica partners' portal: [Known Issues](#).

Upgrade Procedure: Customizations

Multiple changes were done since Version 6 (6.00.0955), which may affect reports, customizations and integrations that were built in the prior versions.

To prevent breaking changes in your customizations, do the following:

1. Analyze your customizations.
2. Carefully read the list of breaking changes in the [Upgrade Procedure: Breaking Changes](#) section.
3. Replace changed objects with their alternatives.
4. If the objects used in your customizations were removed without a replacement, consider creating new customizations.

After an upgrade to Acumatica ERP 6.1, to detect the changes that break an existing customization, you can check the compatibility of the code included in all published customization projects with the original code. For details, see [Publishing a Customization](#) (the Checking the Compatibility of the Customization Code with the Original Code section).



: The validation that detects breaking changes is by default turned on in Acumatica ERP 6.1. If you receive any errors during the validation, we strongly recommend that you read the [Resolving an Issue Discovered During the Validation](#) article.

The complete list of the changes with the suggested alternatives is provided in the Acumatica ERP 6.1 Technical Release Notes document.

Upgrade Procedure: Breaking Changes

Multiple changes have been made since Version 6 (6.00.0955), which may affect reports, customizations, and integrations that were built in the prior versions. The basic changes are listed in this section. The complete list of the changes with the possible alternatives is provided in the Acumatica ERP 6.1 Technical Release Notes document.



: If you upgrade from Version 5.3, see the list of breaking changes between Version 5.3 Update 13 (5.30.2347) and Version 6 (6.00.0955) in [Acumatica 6 Initial Technical Notes](#).

Removed Screens

No screens have been removed that were present in the prior versions.

Removed Tables

The following table have been removed from the database:

- EMailSyncOperation

Removed Fields

The following fields have been removed from the database:

- MaxIncomingSize
- Path
- InsuranceRequired
- RequiredRecalculation
- ResourceLocID
- AdjustContractStartDate
- Max
- Min
- IsKey

Modified Field Types

The following table lists the fields whose types have been modified.

Field Name	Old Type	New Type	Old Precision	New Precision	Old Scale	New Scale	Old Max Length	New Max Length
DBMultiplier	Decimal	Decimal	9	11	6	6	0	0
DataField	VarChar	VarChar	0	0			50	256
EntityClassID	NVarChar	NVarChar	0	0			10	30

Removed Data Access Classes

The following table lists the data access classes (DACs) that have been removed from the database.

Namespace	Class Name
PX.SM	EMailSyncOperation
PX.SM	WikiPageAnalytic
PX.Objects.CR	BusinessAccountGraphBase<Base,Primary,Where> +BAccountItself
PX.Objects.TX	VATTaxTran
PX.Objects.TX	TaxTranExtInfo
PX.Objects.IN	InventoryLotSerInq+INTran2
PX.Objects.IN	ItemCostHistByPeriodByItemSite

Removed Graphs

The following table lists the graphs that have been removed from the database.

Namespace	Class Name
PX.Objects.CR	BusinessAccountGraphBase<Base,Primary,Where>
PX.Objects.TX	ProcessPendingVAT
PX.Objects.SO	SOPaymentEntry

Removed Constants

The following table lists the constants that have been removed from the database.

Namespace	Class Name
PX.Objects.GL	GLScheduleType+deferredRevenue
PX.Objects.GL	GLScheduleType+deferredExpense
PX.Objects.CA	CACredit

Organization: Approvals of Expense Receipts

Acumatica ERP now provides the functionality that you can use to set up the process of approving expense receipts submitted by employees of your company. For more information on the approval of expense receipts, see [Expense Receipt Approval](#).

To configure the approval process, you have to enable the *Approval Workflow* feature on the *Enable/Disable Features (CS100000)* form and specify an approval map in the **Expense Receipt Approval Map** box on the **General Settings** tab of the *Time and Expenses Preferences (EP101000)* form (see the following screenshot). Based on the map, authorized approvers are assigned to submitted expense receipts and, optionally, notified by email about the receipts pending approval.

Revision Two HQ - Time & Expenses Preferences

General Settings

NUMBERING SETTINGS

- Expense Claim Numbering Sequence: EPCLAIM - EP Expense Clai
- Time Card Numbering Sequence: TIMECARD - Timecard
- Equipment Time Card Numbering Sequence: EQTIMECARD - Equipment

APPROVAL SETTINGS

- Expense Receipt Approval Map: Expense Receipt Approvals
- Expense Claim Approval Map: Expense claim approval
- Time Card Approval Map: Time card approval
- Equipment Time Card Approval Map: Equipment time card approva

PENDING APPROVAL NOTIFICATION

- Expense Receipt Notification:
- Expense Claim Notification:
- Time Card Notification:
- Equipment Time Card Notification:

POSTING SETTINGS

- Automatically Release AR Documents
- Automatically Release AP Documents
- Automatically Release PM Documents

EXPENSE CLAIM SETTINGS

- Combine Sales Sub. From: EEE-EEE
- Combine Expense Sub. From: EEE-EEE
- Hold Expense Claims on Entry

TIME REPORTING SETTINGS

- Require Time On Activity
- Default Time Activity Type: W - Work Item
- Min Billable Time: 00:00
- Regular Hours Earning Type: RG - Regular Hours
- Holiday Earning Type: HL - Public Holidays
- Vacations Earning Type: VL - Vacations
- Post to Off-Balance Account Group

WEEK SETTINGS

- Custom Week Configuration
- First Day of Week:

Figure: The Expense Receipt Approval Map box on the Time and Expenses Preferences form

You can approve or reject expense receipts by using the **Approve** or **Reject** actions on the *Expense Receipt (EP301020)* form (see the screenshot below).

Revision Two HQ - Expense Receipt

SAVE & CLOSE

Receipt ID: 112 Status: Pending Approval

Receipt Details Approval Details

EXPENSE DETAILS

ACTIONS

- Submit
- Approve
- Reject
- Put on Hold

EXPENSE CLASSIF

Figure: The Approve and Reject actions on the Expense Receipt form

Also, receipts can be approved on the *Approvals (EP503010)* form. If you have access to this form, you can view receipts in accordance with the visibility rules applied to all documents listed on this form.

(That is, you can view the receipts assigned to you, to the members of your workgroup, and to the members of the workgroups at lower levels in the company tree than your workgroup.)

Once approved, expense receipts can be claimed if approval is required for the receipts based on the conditions specified in the approval map. Rejected receipts can be put on hold for a user to adjust and re-submit them.

The following new statuses of expense receipts have been introduced in the scope of this feature:

- *On Hold*: The receipt is new and has not been submitted for approval yet.
- *Open*: The receipt is ready to be claimed after it has been approved (if approval is required for the receipt) or after it has been submitted for further processing (if approval is not required).
- *Pending Approval*: The receipt is pending approval.
- *Rejected*: The receipt has been rejected.

Finance: Enhanced Recognition of Pending VAT

In some countries, there are legal requirements that VAT should be recognized, accrued, and included in the tax report only when payment is received for the taxed goods or services. To satisfy these requirements, in Acumatica ERP, the *On Payment* VAT recognition method has been implemented.

With this method, a user can recognize tax amounts on the date of payment application. Also, Acumatica ERP now provides users with the ability to recognize tax amounts fully or partially, depending on whether the payment completely or partially covers the amount of the document. If a document is paid partially, the amount of tax is recognized proportionally to the amount paid. For more information on recognition of pending VAT, see [VAT Pending Recognition](#)

VAT Recognition Options

The new **VAT Recognition Method** box has been added to the **Tax Agency Settings** tab of the *Vendors (AP303000)* form. In this box, a user can specify the *On Payments* recognition method to be used for the selected tax agency (see the following screenshot).

The screenshot displays the 'Vendors' form in Acumatica ERP, specifically the 'Tax Agency Settings' tab for vendor 'VAT-AGENCY'. The 'VAT Recognition Method' dropdown menu is highlighted with a red box, showing three options: 'On Payments' (selected), 'On Documents', and 'Manually Entered'. Other settings visible include 'Reporting Period Type' set to 'Monthly', 'Tax Report Rounding' set to 'Mathematical', and 'Tax Report Precision' set to '2' with 'Use Currency Precision' checked.

Figure: The VAT Recognition Method box on the Vendors form

The *On Documents* option (the default one) is also available in the **VAT Recognition Method** box, and can be specified for the tax agency. With this recognition method, the total VAT amount of a document can be recognized on any needed date (the VAT recognition does not depend on payment applications).

Pending VAT Processing

The *Recognize Output VAT (TX503000)* and *Recognize Input VAT (TX503500)* forms have been enhanced. On these forms, when a user selects a tax agency, the system fills in the **VAT Recognition Method** box with the tax agency's default setting (see the following screenshot).

Revision Two HQ - Recognize Output VAT

PROCESS PROCESS ALL

Date: 1/26/2017 Tax ID: VAT Recognition Method: On Payments

Branch: HQ - Revision Two HQ Total Tax Amount: 0.00

Tax Agency: VAT-AGENCY - VAT reporting

Module	Type	Reference Nbr.	Date	Status	Tax ID	Tax Rate	Taxable Amount	Tax Amount	Tax Doc. Nbr	Tax Doc. Date	Batch Number
--------	------	----------------	------	--------	--------	----------	----------------	------------	--------------	---------------	--------------

Figure: VAT Recognition Method box on the Recognize Output VAT form

Depending on the VAT recognition method specified for a tax agency, a list of applications or documents are loaded to these forms, and a user can run the VAT recognition process.

New VAT Pending Recognition Report

Users can reconcile the list of documents having unrecognized VAT amounts with the balances of the Pending Tax Payable and Pending Tax Claimable accounts in the General Ledger module by using the new *VAT Pending Recognition (TX631000)* report. This report shows the list of documents that have a value-added tax (VAT) balance pending recognition at the end of the selected financial period.

The report can be prepared for the input type of VAT, and for the output type of VAT.

Distribution: Change of the Customer in Sales Orders

To extend the ways you work with sales orders and simplify the creation of sales orders by using template orders, we have implemented the ability to change the customer ID in an existing sales order. You can change the customer ID even if the lines were already populated on the **Document Details** tab of the *Sales Orders (SO301000)* form for the existing order. Now you can start to create a sales order by copying and pasting another sales order, which you use as a template, and then changing the customer ID specified in the sales order to another one. (See the following screenshot.)

The screenshot shows the 'Sales Orders' form with the 'Document Details' tab active. The 'Customer' field is set to 'ABARTENDE - USA Bartending Schc'. A 'Select - Customer' dialog box is open, displaying a list of customers. The 'ABARTENDE' customer is selected. The dialog box has a search bar and a list of customers with columns for Customer ID, Customer Name, Address Line 1, Address Line 2, and Postal Code. Below the dialog box, there is a table with columns for Branch, Inventory ID, Free Item, and Warehouse.

Customer ID	Customer Name	Address Line 1	Address Line 2	Postal Code
ABARTENDE	USA Bartending School	203 Lower Notch Rd		07424
ABCHOLDING	ABC Holdings Inc	65 Broadway		10006
ABCSTUDIOS	ABC Studios Inc	77 W 66th St # 13		10023
ABCVENTURE	ABC Capital Ventures	601 W Girard Ave		19123
ACTIVESTAF	Active Staffing Service	460 W 34th St		10001
ALPHABETLD	Alphabetland School Center	17575 Newbridge Rd		10013
AMROBANK	AMRO Bank N.V.	351th Fl., Atago Green Hills ...	55-12, Atago 26-chome, Mina...	105-625
ANTUNSWEST	Antun's of Westchester	15 S Central Ave		10523
APOSTELSCH	Church of The Apostles	406 Willet Dr		75019
ARTCAGES	Artcages	22112 Clay Spring Loop		02025
ASAHISUNTR	Asahi Sun Tours	45-87, Shiba Daimon 17-cho...	Hamamatsucho Seiwa Bldg	105-854

Figure: Changing the customer ID in the sales order

With the new feature, a user can create an order with a temporary customer ID (one that does not correspond to a real customer), allocate goods in inventory for the order, and then change the temporary customer ID to the real one once the prospect is ready to buy. Also, a user can create a quote, copy the quote to an order, and then change the customer ID in the copied order to the needed one. For more information on which document information is changed or preserved when the user overrides the customer ID, and for the list of restrictions on changing the customer ID, see [Sales Order Processing Options](#).

Distribution: Use of the Warehouse Shipper Address

If your company is configured as one branch that uses multiple warehouses without multi-branch support, you may want the shipper address from the particular warehouse to be used in documents. Previously, the shipper address of the branch was always used.

To support these requirements, on the *Carriers (CS207700)* form, the *SHIPPER FROM* parameter has been added for the *UPS* and *FEDEX* carriers. The parameter has the following values:

- *Company Branch* (default; corresponds to the system behavior of previous Acumatica ERP versions): The system uses the shipper contact information of the branch.
- *Warehouse*: The system uses the shipper contact information of the warehouse.

Revision Two HQ ▾ Carriers ★

TEST CONNECTION

* Carrier ID:

Description:

* Plug-In (Type):

Carrier Unit of Weight:

* UOM:

Plug-in Parameters

Customer Accounts

ID	Description	Value
ACCOUNTID	Account Number	510087828
DROPOFF	Identifies the method by which the pac...	BUSINESS_SERVICE_CENTER
ENDPOINT	FedEx Rate Service Url	https://wsbeta.fedex.com:443/web-services/rate
LBL FORMAT	Provides the type of data stream or bit...	PNG
LBL PRINT ORT	Label Printing Orientation	BOTTOM_EDGE_OF_TEXT_FIRST
LBL STOCK TYPE	Label Stock Type	PAPER_4X6
LOGIN		kqlzEIBeQ04DktQf
METERID	Meter Number	118698585
NOTIFY	Send Notification to Recipient	<input type="checkbox"/>
PASSWORD		*****
POST ENDORS	Smart Post endorsement type	ADDRESS_CORRECTION
POST HUBID	Specify the Smart post HubID using th...	
POST INCIDIA	Smart Post indicia type	MEDIA_MAIL
SA ENDPOINT	FedEx Availability Service Url	https://wsbeta.fedex.com:443/web-services
SHIP ENDPOINT	FedEx Ship Service Url	https://wsbeta.fedex.com:443/web-services/ship
SHIPPER FROM	Shipper Contact information source.	<div style="border: 1px solid #ccc; padding: 2px;"> <input type="text" value="Company Branch"/> </div> <div style="border: 1px solid #ccc; padding: 2px; background-color: #0070c0; color: white; margin-top: 2px;">Company Branch</div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;">Warehouse</div>
SIGN RELZ NO	Signature Release Number.	
SIGNATURE	Signature option	

Figure: SHIPPER FROM parameter for the FedEx carrier

Distribution: Partial Receipt of Two-Step Transfers

Sometimes transferred stock items are partially received, and this needs to be reflected in the system. To satisfy these requirements, Acumatica ERP now provides the ability to receive partial quantity of stock items in transfers.

It is now possible to create partial receipts of stock items that have already been shipped from the source warehouse but have not yet received at the destination warehouse. You can create partial transfer receipts for the inventory transfers on the *Receipts (IN301000)* form, and partial receipts for transfer orders on the *Purchase Receipts (PO302000)* form. The **Receipt Qty.** column on the **Document Details** tab of the *Purchase Receipts* form and the **Quantity** column on the **Transaction Details** tab of the *Receipts (IN301000)* form are now editable, so that you can correct the quantity for the lines for which the items are received partially.

The informational columns **Received Qty.** and **In-Transit Qty.** have been added to the **Transaction Details** tab of the *Transfers (IN304000)* form and to the **Document Details** tab of the *Shipments (SO302000)* form for shipments of the *Transfer* type. The **Received Qty.** column shows the total quantity specified in the receipts that are linked to the current document line. The **In-Transit Qty.** column shows the quantity of items that are in-transit.

Platform: Enhanced Access Rights Management

The management of access rights has been enhanced in Acumatica ERP 6.1. The list of users can be managed more easily during user type configuration, and setup of access rights inheritance between system objects and their children is more convenient with new system functions. For more information about access rights in Acumatica ERP, see [User Security](#).

Implemented Enhancements

The following enhancements have been introduced in Acumatica ERP 6.1:

- The **Apply to Users** button has been added to the **Allowed Roles** tab of the *User Types* (EP202500) form, as shown in the following screenshot. When you click this button, the system applies the default roles to all users of the selected user type.

Revision Two HQ ▾ User Types ★

* User Type:

Linked Entity:

* Description:

<input type="checkbox"/>	Default	* Role Name	Role Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BRANCH HQ	Employees in HQ Br...
<input type="checkbox"/>	<input type="checkbox"/>	BRANCH VA	Employees in VA Br...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EMPLOYEE	Access to tasks, ap...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Internal User	Allows the user to ch...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SALES	Sales
<input type="checkbox"/>	<input type="checkbox"/>	SALESMGR	Sales Manager
<input type="checkbox"/>	<input type="checkbox"/>	Wiki Author	Role provides acces...

Figure: The Apply to Users button on the User Types form

- The **Users** tab has been added to the *User Types* form, as shown in the following screenshot. This tab displays the list of users that are assigned to the selected user type.

Revision Two HQ ▾ User Types ★

* User Type:

Linked Entity:

* Description:

		* Login	Status	Display Name	Comment
>	<input type="checkbox"/>	domenico	Active	Rick Domenico	
	<input type="checkbox"/>	killian	Active	Eric Killian	
	<input type="checkbox"/>	kinne	Active	John Kinne	

Figure: The Users tab on the User Types form

- The **Applies to Children** check box has been added to the *Access Rights by Role* (SM201025) and *Access Rights by Screen* (SM201020) forms; see the following screenshot, which displays the *Access Rights by Screen* form. On the *Access Rights by Screen* form, this check box indicates (if selected) that the access rights level for the role specified to the selected system object is the same for all nested objects (children) within the object. On the *Access Rights by Screen* form, this check box indicates (if selected) that the access rights level to the system object specified for the selected role is the same for all nested objects (children) within the object.
- Tooltips have been added for nodes on the *Access Rights by Role*, *Access Rights by Screen*, and *Access Rights by User* (SM201055) forms that may contain the following information:
 - For a suite or module: The page ID
 - For a form: The form ID and the name of the business logic controller (as shown in the following screenshot)
 - For all other nodes (for example, form elements): No information (that is, no tooltip is displayed)

Revision Two HQ ▾ Access Rights by Screen ★

Role	Description	* Access Rights	Applies to Children
Administrator	System Administrator	Delete	<input checked="" type="checkbox"/>
Anonymous	Anonymous	Not Set	<input checked="" type="checkbox"/>
BI	Access to Business Intelligence Views	Not Set	<input checked="" type="checkbox"/>
BRANCH HQ	Employees in HQ Branch	Not Set	<input checked="" type="checkbox"/>
BRANCH VA	Employees in VA Branch	Not Set	<input checked="" type="checkbox"/>
CONSULTANT	Consultant	Not Set	<input checked="" type="checkbox"/>
Customizer	Customizer	Not Set	<input checked="" type="checkbox"/>
DashboardDesigner	Dashboard Designer	Not Set	<input checked="" type="checkbox"/>
DEMO	Demo role for eval (add HQ and VA)	Delete	<input checked="" type="checkbox"/>
EMPLOYEE	Access to tasks, approvals, expense...	Not Set	<input checked="" type="checkbox"/>

Figure: The Access Rights by Screen form

Platform: EULA Acceptance

In Acumatica ERP 6.1, customers who use a pre-configured system or a system as a service must read and accept the end-user license agreement (EULA). The first user who signs in to Acumatica ERP or an Acumatica Framework application after installation has to accept the end-user license agreement (EULA) while changing the default password. (Previously, Acumatica ERP and Acumatica Framework displayed the EULA and suggested that the user accept it only during installation of the product and during license application. That is, only the person who installed the product and applied the license had to accept the terms of the EULA).

If you provide a customized version of Acumatica ERP to your customers and sign your version of the license agreement with them, you may turn off the display of the user agreement at the first sign-in. To do this, in the `web.config` file, you should set the `AskEula` parameter (which is located in the `appSettings` section) to *false*, as follows: `<add key="AskEula" value="false" />`.

Platform: Integration with Power BI

In Acumatica ERP 6.1, it is possible to not only build a Microsoft Power BI tile in a dashboard but also embed a Power BI report on a separate page. With this integration, users of Acumatica ERP will have at hand the information that they need for their work. For more information, see [Managing Integration with External Applications](#).

In Acumatica ERP, the following types of integration with Power BI are supported:

- **Power BI:** This type is intended for reports created in Power BI. These reports are kept in a user's personal workspace. Acumatica ERP works with these reports on behalf of this user and uses the OAuth 2.0 protocol for integration. For this integration type, access tokens should be refreshed periodically.
- **Power BI Embedded:** With this type, the Microsoft Power BI Embedded tool is used for the integration of Power BI reports.

Either of these types can be used for adding Power BI reports in Acumatica ERP.

The following screenshot shows a sample Power BI report that was embedded in Acumatica ERP.

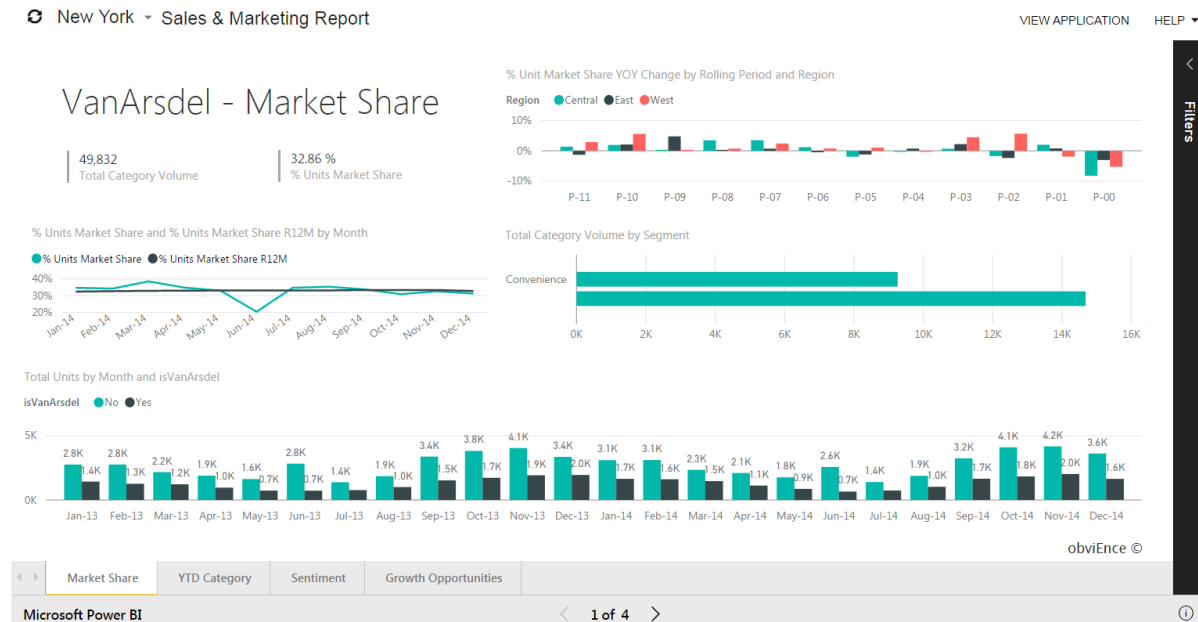


Figure: A Power BI report in Acumatica ERP

User Interface Changes

The following forms have been added to Acumatica ERP to support the integration with Power BI:

- **External Applications (SM301000):** On this form, you configure the integration with Power BI.
- **Application Resources (SM301010):** You use this form to create pages for Power BI reports and edit of the settings of an existing page with the report embedded. Before you add a resource in Acumatica ERP, you should set up the integration with the external application that contains this resource on the *External Applications* form.
- **Refresh Application Access Tokens (SM501000):** This form is used for refreshing access tokens for integrated external applications to prolong access to Power BI reports. Tokens can be refreshed manually, or the process can be scheduled for automated processing. When Acumatica ERP

is integrated with an external application by using the OAuth 2.0 protocol, an access token is provided, which has a short lifetime for security reasons. Therefore, the access token needs to be refreshed periodically.

Other Improvements

Organization

AC-53668: The size restriction option was eliminated from the system email accounts. That is, the **Maximum Message Size** box was removed from the **Content** tab on the *System Email Accounts (SM204002)* form.

Note: This change may cause emails to be received that were previously filtered out by the size restriction option.

AC-67491: When a user changed the exchange synchronization policy name or color on the *Exchange Synchronization Policies (SM204010)* form, the changes did not affect the Outlook synchronization process.

Fix Description: Right after a user saves the changes of policy name or color, the changes automatically affect the Outlook synchronization process.

AC-69452: In the Customer Management module, on the **Activities** tab of all entry forms, the default filter option was set to *Open Activities*.

Fix Description: The default filter option is now set to *All Activities*.

AC-70389: The functionality that enables a user to configure email notifications to approvers of wiki articles has been removed.

AC-74649: The *Equipment (EP208000)* form was available only if the *Project Management* feature was enabled on the *Enable/Disable Features (CS100000)* form. Now the *Equipment* form is available regardless of whether the *Project Management* feature is enabled, because it might be needed for fixed asset management or service management.

System and Platform

AC-68987: The resources of the **Email Settings** section on the **Print and Email Settings** tab of all report forms can now be collected for translation.

AC-70389: The **Scripts** tab has been removed from the *Wiki (SM202005)* form because the functionality of setting up notification templates for wiki articles is not supported anymore.

AC-72220: The **Disable Input Autosuggestion** check box has been added to the *User Profile (SM203010)* form. A user selects this check box to stop the system from displaying a drop-down list with suggestions (for lookup boxes that support autocomplete) when the user is typing text.

AC-72397: A search box has been added to the Formula Editor dialog box that provides the capability to search for text in the Component Selection pane. The search function reduces the time for finding a required object when the list of objects displayed in the pane is very long.

AC-72498: The values of the following boxes on dashboard widgets can now be translated directly in the **Widget Properties** dialog box: **Caption** (for all widget types), **Scorecard Title** (for a Scorecard widget), and **Trend Card Title** (for a Trend Card widget).

AC-73423: Relative parameters (such as @Today) are now supported in simple filters for table columns that contain a date.

AC-74287: Custom colors for column and bar sectors now can be specified for stacked column and stacked bar widgets on a dashboard.

AC-74359: For BQL statements, the `In3` comparison operator has been implemented, which checks whether the specified field value matches any constant value in the list of constants defined by the operand. The list can contain from two to four constants. The condition is true if the field value is equal to a value from the list. This operator can be used instead of the `(... OR ... OR ...)` statement.

AC-74926: The ability to drill down from chart and table dashboard widgets has been implemented. That is, a user can click a chart parameter or a table line, and the corresponding form will be opened with the data filtered by the selected parameter.

AC-74453: The **Export Only Mapped Fields** check box has been added to the *Export Scenarios (SM207025)* form, which indicates (if selected) that only the fields that are mapped in the export scenario should appear in the output of data export; other fields of the data provider are skipped during export. This check box should be selected when data is exported to external systems, such as HubSpot, and the values of fields that are not mapped in the scenario should not be rewritten with null values.

Documentation

AC-66641: The Acumatica ERP Customization Guide has been completely rewritten. The new version of the guide contains a lot more information and can be used as a reference book.

AC-78698: The Getting Started part has been added to the Acumatica ERP User Guide. In this part, various tools of personalizing Acumatica ERP and system-wide actions are described.