End-User Guide

Self-Service Portal User Guide 2025 R2

Acumatica
The Cloud ERP

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Self-Service Portal Overview

The Acumatica Self-Service Portal is a site designed to give the employees of your company limited access to Acumatica ERP instance.

By using the Self-Service Portal, you can manage your contact and user information, place orders in Acumatica ERP, view shipments and all the relevant information about your interactions, create and view cases, and view financial reports.

Your User Profile

In the Self-Service Portal, your personal information is stored, such as your name, organization, email address, phone number, and postal address.

You can view and edit this information any time you need to. You can also view information about your user account and change your password without contacting the portal system administrator. For details, see *Your User Profile*.

User Interface

Employees in different positions use different sets of forms in the Self-Service Portal to perform their work tasks.

You can configure the user interface to have at hand the forms you frequently use. You can tailor the workspace menu items in the main menu so that the system displays only menu items related to your work.

For more information, see *Personalizing the Interface*.

Your Company's Account

On the *Company Profile* (SP408030) form of the Self-Service Portal, you can update your company's address information, official website, and main contact details. You can also update the attention line to define a person or a department to whom emails or documents of your company are referred. For more information, see *Your Company's Information*.

To edit this information, you must be signed in to the Self-Service Portal with a user account that has the *Customer Admin*, *Administrator*, or *Portal Admin* role assigned to it.

Online Ordering

In the Self-Service Portal, you can browse the catalog on the *Catalog* (SP700000) form. The catalog contains the list of items that you can add to your shopping cart. You can search for specific items, filter items by category, and show or hide the items that are not available in stock. You can also view detailed information about any item. If an item is stored in different warehouses, you can select the default warehouse you want the item to be shipped from. On this form, you can also modify the contents of the shopping cart by adding new items, deleting items, and changing the quantities of the added items.

On the *My Cart* (SP700001) form, you can review the items you plan to order, return to the *Catalog* form to continue shopping, or proceed to checkout. You can confirm the order by using the wizard pages on the *Checkout* (SP700002) form.

After you place an order, you can track the order and the order's shipments by using the *My Orders* (SP700003) form. You can also cancel the order, if needed.

For more information, see *Managing Online Orders*.

Finance Overview

On the *My Documents* (SP402000) form of the Self-Service Portal, you can view your company's documents, such as invoices, credit memos, and payments. You can also view aging reports.

The visibility of these financial documents depends on the **Display Financial Documents** setting specified on the *Portal Preferences* (SP800000) form. You can access this form if you are signed in to the Self-Service Portal with a user account that has the *Administrator* or *Portal Admin* role assigned.

Depending on the **Display Financial Documents** option that has been selected, it may be possible to view documents associated with all companies and branches that are available for your company tenant, only a particular branch, or only a particular company.

In the Self-Service Portal, you can print or export these documents to a PDF or to Microsoft Excel.

For more information, see *Your Company's Financial Documents*.

Case Management

In the Self-Service Portal, you can create support cases with the vendor if these capabilities have been configured in the system. Through cases, you can submit requests, complaints, and questions about items that you have bought or are considering buying. You can also retrieve the latest case updates, add information, attach files, and close or reopen cases.

For more information, see *Case Management*.

Managing Your User Profile

In the Acumatica Self-Service Portal, you can view and change your personal information and your user account settings, as described in this chapter.

Your User Profile

In this topic, you will read about managing your personal information in the Acumatica Self-Service Portal.

Viewing Your Personal Information

On the **Details** tab of the *User Profile* (SP408045) form, you can view your personal information, such as your name, position in the company, email address, phone and fax numbers, and postal address.

You can open this form by doing either of the following:

- Clicking your username in the Info area (in the top right corner of the Self-Service Portal screen) and then clicking **My Profile** (for users with any role).
- Clicking the *User Profile* form in the workspace or using the search.

An employee of your vendor's company or your company has initially entered the settings on this form. However, if any of your personal data changes, you can edit this information on your own.

To populate boxes with the default address data of your company, in the **Address** section of the **Details** tab, select the **Same as in Account** check box. The system fills in the address boxes with the data that is entered in the **Main Address** section of the *Company Profile* (SP408030) form.

Viewing and Changing Your User Account Settings

To access the Self-Service Portal, you use your user account, which has been created by an employee who has the *Customer Admin*, *Administrator*, or *Portal Admin* role assigned.

Your user account contains the following main settings: your username, your password, your user type, your default time zone, and personal settings.

On the **User Info** tab of the *User Profile* (SP408045) form, you can change your user account information without contacting the portal system administrator as follows:

- You can change your password or reset it. For details, see *To Change Your Password*.
- You can generate a new password.
- You can change your default time zone.

To Change Your Password

In this topic, you will learn how to change your password in the Self-Service Portal.

To Change Your Password

In the Self-Service Portal, do the following to change your password:

1. In the Info area (in the top right corner of the Self-Service Portal screen), click the User menu button (where your name appears).
2. On the User menu, which opens, click the **My Profile** button. The *User Profile* (SP408045) form opens.
3. On the **User Info** tab, in the **Password** box, enter your new password.
4. On the form toolbar, click **Save**. The next time you sign in to the system, you should use your new password.

Personalizing the Interface

You can configure the user interface of the Acumatica Self-Service Portal so that all the forms you use frequently in your work are at hand. In this chapter, you will read about the ways you can personalize the user interface.

User Interface Personalization

In this topic, you will read about specifying your personal settings in the Acumatica Self-Service Portal so that the user interface better corresponds to your preferences and work responsibilities.

For more information, see *Self-Service Portal User Interface*.

Personal Settings of the User Interface

You can personalize the user interface of the system as follows:

- Personalize the list of workspaces shown in the main menu.
  For details, see *Personalization of Workspaces*.
- Personalize the list of forms and reports shown in the quick menu for each workspace.
  For more information, see *Using of a Quick Menu*.
- Change the location and size of the main menu.
  For details, see *Changing of Location and Size of the Main Menu Panel*.

Personalization of Workspaces

In the Self-Service Portal, the links to forms are organized in workspaces, each of which corresponds to a type of functionality. The main menu panel displays menu items corresponding to these workspaces. You can access other workspaces by using the **More Items** menu item.

You can personalize the workspaces by signing in to your Self-Service Portal instance with a user account that has the *Administrator* or *Portal Admin* role assigned.

For your convenience, you can configure and pin to the main menu panel the items whose workspaces you use frequently in your work. You can also unpin menu items that you do not use.

For more information, see *To Pin and Unpin a Workspace Menu Item on the Main Menu Panel*.

Using of a Quick Menu

When you click a menu item in the main menu, the system opens the quick menu of the workspace that corresponds to the menu item. You can use this menu to quickly access the forms that you use during your work. You can change the list of forms in the quick menu for each workspace.

By clicking the workspace header, you can view the links to all forms of the workspace to which you have access.

For more information, see *To Personalize the Quick Menu*.

Changing of Location and Size of the Main Menu Panel

By default, the main menu is located on the left side of the screen and is displayed in its maximum size. To change the location and size of the main menu panel, do one of the following:

- Collapse the main menu panel so that only the icons of menu items are displayed by clicking in the bottom right corner of the main menu panel.
- Collapse the main menu panel to a button in the top left corner of the screen by clicking in the bottom left corner of the main menu panel and clicking **Collapse to Top**.
- Display only icons on the **Menu** button and in titles of the main menu items. To do this, you click **Menu** and then click in the bottom right corner of the main menu panel.
- Expand the main menu panel to the left by clicking in the bottom left corner of the main menu panel and then clicking **Expand to Left**.

For the procedure that describes how to minimize the menu panel on the screen, see *To Use the Maximum Screen Space*.

To Pin and Unpin a Workspace Menu Item on the Main Menu Panel

In this topic, you will learn how to pin and unpin the workspace menu items that are displayed on the main menu panel in the Self-Service Portal.

You can personalize the workspaces by signing in to your Self-Service Portal instance with a user account that has the *Administrator* or *Portal Admin* role assigned.

To Pin a Workspace Menu Item

To pin a workspace menu item to the main menu panel, do the following:

1. On the main menu panel, click **More Items**. A menu is opened with tiles, grouped by broader functional areas, that represent all of the possible workspaces.
2. Click the menu item whose workspace you want to pin to the main menu. The workspace opens.
3. On the workspace title bar, click the **Pin to Main Menu Panel** ( ) button.

To Unpin a Workspace Menu Item

1. On the main menu panel, click the menu item whose workspace you want to unpin. The workspace opens.
2. On the workspace title bar, click **Unpin from Main Menu Panel** ( ).

To Personalize the Quick Menu

In this topic, you will learn how to personalize the list of forms that are displayed on the quick menu of any workspace. The changes you make are effective for only your user account.

To Configure the Quick Menu Items

To personalize the quick menu in the Self-Service Portal, do the following:

1. Open the workspace whose quick menu you want to configure.

2. On the workspace title bar, click **Configure Quick Menu** ( ) to switch to **Configuration** mode.
3. For each form that you want to include in the quick menu, select the check box left of its title.
4. For each currently included form that you want to exclude from the quick menu, clear the check box left of its title.
5. On the workspace toolbar, click **Exit** to apply changes and exit the configuration mode.

To Use the Maximum Screen Space

In this topic, you will learn how to use the maximum screen space for the working area in the Acumatica Self-Service Portal by changing the size of the main menu panel in two ways: by collapsing it to be the size of a button, and by reducing its width.

To Collapse the Main Menu Panel

You can collapse the main menu panel so that it takes up a minimum of a space on the screen. Do the following:

1. In the bottom left corner of the main menu panel, click the **Open Configuration Menu** ( ) button.
2. Click **Collapse to Top**.

   The main menu panel is collapsed, and the **Menu** button is added in the top left corner of the screen.

To Reduce the Width of the Main Menu Panel

Now, you will display the compact view of the icons and workspace names. Do the following:

1. In the top left corner of the screen, click **Menu**. The main menu panel opens.
2. In the bottom right corner of the main menu panel, click the **Collapse Main Menu Panel** ( ) button.

   Notice that the width of the main menu panel decreases, providing more space in the working area. You can click **Expand Main Menu Panel** to restore the main menu panel to its previous width.

You have collapsed the main menu panel in the Self-Service Portal and reduced its width.

Managing Your Company Account

In the Acumatica Self-Service Portal, you can keep track of your company-related information. Your company is also referred to as a *customer* because you are a customer of the vendor that has provided you with access to the Self-Service Portal.

In the Self-Service Portal, *customer contacts* are the users of your company that have permission to access the system and work in it.

In this chapter, you will find information on managing your company's contacts and keeping track of the company account, or viewing financial documents associated with your company.

Your Company's Information

You can manage company-related information by using the Acumatica Self-Service Portal.

On the *Company Profile* (SP408030) form, you can view and update your company's basic information, such as the official website, phone number, and main address. You can also fill in the **Attention** box to define the person or a department to whom emails or documents should be referred.

To edit the information on this form, you must be signed in to the Self-Service Portal with a user account that has the *Customer Admin*, *Administrator*, or *Portal Admin* role assigned to it.

For details, see *To Edit Your Company's Account Information*.

To Edit Your Company's Account Information

In this topic, you will learn how to view and update your company's address and main contact settings in the Self-Service Portal.

You can edit the company's account information by signing in to the Self-Service Portal instance with a user account that has the *Customer Admin*, *Administrator*, or *Portal Admin* role assigned.

For more information, see *Your Company's Information*.

To Edit Your Company's Information

1. Open the *Company Profile* (SP408030) form. In the **Main Contact** section, check the contact details of your company (such as the official website, phone number, and main address), and make any needed updates.
2. In the **Attention** box, type the person or department who should receive emails and documents from your company.
3. In the **Main Address** section, check the address of your company, and make updates, if needed.
4. On the form toolbar, click **Save**.

Your Company's Financial Documents

By using the Acumatica Self-Service Portal, you can keep track of your company's account. You can view documents associated with all companies and branches that are available for the tenant, only a particular branch, or only a

particular company. Also, you can view the statement history and check the outstanding, overdue, and prepayment balances.

> ⚠ All amounts are displayed in your company's base currency as defined in its record on the Customers (AR303000) form in Acumatica ERP.

Viewing Documents

By using the *My Documents* (SP402000) form, you can do the following:

- Check the outstanding and prepayment balances of invoices.
- Check the balances of credit memos.
- View documents—such as invoices, credit memos, or prepayments—.
- View and print invoices or credit memos. For details, see *To Print an Invoice or Credit Memo*.
- View, print, or export to a PDF or to Microsoft Excel any of the following reports: AR Aging (AR631000), AR Aging MC (AR631100), and AR Balance by Customer (AR632500).

> ⚠ The visibility of financial documents depends on the **Display Financial Documents** settings specified on the *Portal Preferences* (SP800000) form. You access this form by signing in to your Self-Service Portal instance with a user account that has the *Customer Admin*, *Administrator*, or *Portal Admin* role assigned.

Viewing Statements

On the *My Statements* (SP404600) form, you can view the statement history and check the documents included in a selected statement.

To open the Customer Statement (AR641500) print form, you need to select the period in which the statements were generated, select the statement, and then click the **Print Statement** button on the form toolbar.

To Print an Invoice or Credit Memo

In this topic, you will learn how to view and print a financial document—that is, an invoice or a credit memo—of your company in the Self-Service Portal.

To View and Print Documents

1. Open the *My Documents* (SP402000) form.
2. In the table, click the row with the invoice or credit memo you want to print, and then click **Print Invoice/Memo** on the form toolbar. A printable version of the document opens.
3. View the settings of the document, which might include the billing information, shipping address, list of items, and item quantity and price.
4. On the form toolbar, click **Print** to print the invoice or credit memo.

> ⓘ You can export the document to a PDF or to Microsoft Excel by clicking **Export** on the form toolbar.

Your Company's Contacts

In the Acumatica Self-Service Portal, *customer contacts* are the users of your company that have permission to access the system and work in it.

On the *Contact* (SP408041) form, you can create customer contacts and enter their basic settings, such as the contact's name, position, and email address.

You can open this form in any of the following ways:

- By clicking the **Add New** button on the *Contacts* (SP408040) form.

  > ⚠ The *Contacts* form is available only for users with the *Customer Admin*, *Administrator*, or *Portal Admin* roles.

- By clicking a contact in the **Contact** column of the *Contacts* form.
- By clicking the *Contact* form in the workspace or using the search.

If the contact will sign in to the Self-Service Portal, you add the settings of the user account of the contact, such as the time zone, user status and type, username, and password.

On the **User Info** tab of the *Contact* form, you can specify information about the user account of the customer contact. A user with an active user account is allowed to access the Self-Service Portal. To prohibit the user from accessing the system, you disable the user account.

If employees of your organization who use the Self-Service Portal need to generate documents with the business date in a time zone that differs from the default time zone (which is specified by the portal administrator), you can change the time zone for each of these employees manually.

> ⚠ If your user account has the *Customer User* role assigned but none of the administrative roles, you can see contacts on the form, but can edit only your own contact settings.

For more information on adding contacts, see *To Create a Contact*.

To Create a Contact

In this topic, you will learn how to create a contact in the Acumatica Self-Service Portal. You use the *Contacts* (SP408040) form, which lists all existing contacts, as a starting point to work with a contact. From this form, you open the *Contact* (SP408041) form to enter or edit a contact's settings.

In the process of creating a contact, you will enter settings that the system will use to create a corresponding user account so that the contact can sign in to the system. To do this, on the **Access to Portal** tab of the *Contact* (SP408041) form, you will enter basic user settings, including the user type, which will grant access rights to the new user.

> ⚠ To access to the *Contacts* (SP408040) form, you must be signed in to the Self-Service Portal with a user account that has the *Customer Admin*, *Administrator*, or *Portal Admin* role assigned.

To Add a Contact

To create a contact, do the following:

1. In the Self-Service Portal, open the *Contacts* (SP408040) form.
2. On the form toolbar, click the **Add New** button. The *Contact* (SP408041) form opens.
3. On the **Details** tab, enter the contact information of the employee as follows:
   a. In the **Summary** section, enter the employee's name and job title.
   b. In the **Contact** section, enter the main contact data, including the email address, website, and phone and fax numbers.

      Make sure that the email address is valid because it may be used to send the user information, including password recovery details.

   c. In the **Address** section, select the **Same as in Account** check box to use the company's address as the contact address. You can leave the **Same as in Account** check box cleared and enter the address manually if the new contact has a different business address.

To Create a User Account

While you are on the *Contact* (SP408041) form, you will create a corresponding user account so that the contact can sign in to the Self-Service Portal. Do the following:

1. In the **User Type** box of the **Access to Portal** tab (**User Information** section), select the user type, which grants access rights to the new user.
2. In the **Login** box, enter the username to be used to sign in to the Self-Service Portal.
3. In the **Selected** column of the table, in the list of available roles, select the check boxes for the user roles you want to assign to the contact's user account.

   The contact must have at least one role to be able to access the Self-Service Portal.

4. To create a password for the user, do one of the following:
   - Select the **Generate Password** check box to generate the password automatically; the system will send the username and password to the contact by using the email address you have specified in the **Email** box on the **Details** tab.
   - Clear the **Generate Password** check box, and type the new password in the **Password** box. The user will be asked to enter the new password during the next sign-in to the system.
5. In the **Time Zone** box (**Personal Settings** section), select the time zone to define the working hours for the new user account.
6. In the **Status** box (**User Information** section), make sure that the user account has the *Active* status.
7. In the Summary area, make sure that the **Active** check box is selected for the new user account.
8. On the form toolbar, click **Save**.

You have created the contact and corresponding user account so that the contact can sign in to the Self-Service Portal.

Managing Customer Accounts

In the Acumatica Self-Service Portal, the employee of you vendor can create and manage a customer contact, which is linked to your company's business account.

Managing Customer Accounts

Acting as an employee of the company that uses the Acumatica ERP instance, in the Acumatica Self-Service Portal, you can use the *Customer Account* (SP408032) form to create a customer contact and link it to a business account. In the Self-Service Portal, you can open the *Customer Account* (SP408032) form by clicking a business account identifier on the *Customer Accounts* (SP408033) form.

Customer accounts are business accounts of companies that can access the Self-Service Portal. *Customer contacts* are the employees of your company who have permission to access to the Self-Service Portal and work in it.

For each customer account, you create a customer contact, which is linked to a company's business account. Then you enter contact information for the customer's employee, which can be the contact's name, position, and email address.

You can create a customer contact by signing in to the Self-Service Portal instance with a user account that has the *Administrator* role assigned.

To Create a Customer Contact

Acting as an employee of the company that uses the Acumatica ERP instance, in the Acumatica Self-Service Portal, you can create customer contacts for business accounts of your customers (customer accounts).

Customer accounts are business accounts of companies that can access the Self-Service Portal. *Customer contacts* are the employees of your company who have permission to access to the Self-Service Portal and work in it.

In the Self-Service Portal, you can use the *Customer Account* (SP408032) form to create a customer contact and link it to a business account.

You can create a customer contact by signing in to the Self-Service Portal instance with a user account that has the *Administrator* role assigned.

To Create a Customer Contact

1. In the Self-Service Portal, open the *Customer Accounts* (SP408033) form.
2. In the **Business Account** column of the table, click the business account identifier, which customer contact you want to create. The *Customer Account* (SP408032) form opens.
3. On the form toolbar, click **Create Contact**. The **Create Contact** dialog box opens.
4. On the **Main** tab, enter the contact information of the customer contact, which can be contact's name, job title, phone number, email, or contact class.
5. On the **Attributes** tab, enter the attributes, which are defined in the class you selected for the customer contact in the **Contact Class** box of the **Main** tab.
6. Click **Create**.

Reviewing Contract Settings

The Acumatica Self-Service Portal gives you the ability to see the contracts associated with your account, as described in the topics of this section.

Viewing of Contracts

A *contract* represents an agreement between a vendor (the seller of goods or provider of a service) and a customer (the recipient of the goods or the consumer of the service). Contracts consist of different combinations of terms and items geared toward the particular needs and capabilities of the organizations involved.

For example, a contract may specify that your company will be provided certain services—such as cable TV service, Internet access, or web account hosting—from a vendor during a specified period of time. Other contracts may contain service agreements to maintain and repair a product during the warranty period of the manufacturer or a particular time period. Service contracts often include a number of cases that may be solved during a warranty period. A case includes the efforts, work time spent on problem resolution and the related phone calls and emails, to resolve a particular issue.

On the *My Contracts* (SP404000) form, you can view the contracts associated with the customers included in your company account.

This functionality appears in the Self-Service Portal, if the *Contract Management* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP. To see the *My Contracts* form, you must be signed in to the Self-Service Portal with a user account that has the *Customer Admin* or *Administrator* role assigned to it.

You can check the contract settings on the *Contract* (SP301000) form. The contract settings include such data as the contract status, the setup and expiration dates of the contract, the grace period, and the contract services.

Fore more information, see *To View Contract Details*.

To View Contract Details

You can use the *My Contracts* (SP404000) form to view the available contracts in the Acumatica Self-Service Portal. From this form, you can open the *Contract* (SP301000) form to view the details of any listed contract. For more information about contracts, see *Viewing of Contracts*.

This functionality appears in the Self-Service Portal, if the *Contract Management* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

To View Contract Details

1. Open the *My Contracts* (SP404000) form.
2. In the **Status** box (the Selection area), select the status of the contract to narrow the range of contracts listed in the table.
3. In the table, click the identifier of contract you want to see. The *Contract* (SP301000) form opens.
4. Review the details of the selected contract.

Managing Cases

In this chapter, you will find information about the creation of cases in the Acumatica Self-Service Portal.

Case Management

In the Acumatica Self-Service Portal, you can use cases (also referred to as *support cases* or *tickets*) to communicate with your vendor. Through cases, you can submit requests, complaints, and questions about items that you have bought or are considering buying. By using the Self-Service Portal, you can easily submit, view, and track cases, as well as attach files and notes related to a case.

This functionality appears in the Self-Service Portal, if the *Case Management* and *Case Management on Portal* features are enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

Forms for Working with Cases

As you work with cases in the Self-Service Portal, you can use the following forms:

- *New Case* (SP203000): By using this form, you can create a case.
- *Case Details* (SP203010): By using this form, you can view the information provided in a case, check the case progress, enter additional information, and close the case.

  You can open the *Case Details* form from the All Cases (GIP00000) form by clicking the identifier of the case in the **Case ID** column.
- *Open Cases* (SP204000): This is an inquiry form with a table in which you can view open cases. You can narrow the range of open cases listed by the creator and the contract (if applicable).
- *Closed Cases* (SP204010): This is an inquiry form with a table in which you can view closed cases. You can narrow the range of closed cases listed by the creator and the contract (if applicable).

Case Creation

In the Self-Service Portal, when you create a case by using the *New Case* (SP203000) form, you enter the following information:

- In the **Contract** box, the ID of the contract within which the case is created (if applicable). This box is displayed if the *Contract Management* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP. For more information about contracts, see *Viewing of Contracts*.
- In the **Priority** box, the case priority, which determines the order of case processing by the support team.
- In the **Class ID** box, the case class to which this case belongs.

  The settings of a case class are specified on the Case Classes (CR206000) form of Acumatica ERP. When you select a case class, on the **Attributes** tab of the current form, the system fills in *attributes*, which are an additional elements that hold information about the case. You need to specify the value of each attribute in the **Value** column of the **Attributes** tab.
- In the **Subject** box, a short description of the case.
- On the **Details** tab, a complete description of the case. We recommend that you provide as much information as possible so that the support team can diagnose and address the issue as quickly and effectively as possible.
- Any additional notes you provide.

- Any files that you attach to the case.

For detailed instructions on how to create a case, see *To Create a Case*.

Case Processing

In the Self-Service Portal, a case may be assigned one of the following statuses, which are shown on the forms you use to work with cases:

- *New*: You have submitted a case to the support team.
- *Open*: The support team has started working on the case, and its owner has assigned the case this status.
- *Pending Customer*: The support team is waiting for information or a response from you.
- *Closed*: The support team has resolved and closed the case.
- *Released*: The support team has resolved the case and released it, which causes a case-related invoice to be created.

Support teams usually process cases based on their priorities. A case may be assigned to a case owner (that is, a representative of the vendor's support team who is responsible for resolving the case). The system specifies the status of a case based on actions by the customer or the support team members.

When a case is updated or a support engineer requests additional information, you will get an email notification if notifications are configured in Acumatica ERP.

When a case has the *Open* status, on the *Case Details* (SP302010) form, you can add comments to the case at any time. You click **Add Comment** on the form toolbar to open the **New Comment** dialog box, in which you can add comments and attach files (if needed).

In the Self-Service Portal, you can open the *Case Details* form by clicking a case identifier in the **Case ID** column of the All Cases (GIP00000) list of record.

When you save a new comment, the system lists it on the **Activities** tab of the *Case Details* form. The **Case Description** tab is unavailable for editing. On this tab, you can see the case details that the case owner of the support team has entered on the **Details** tab of the Cases (CR306000) form in Acumatica ERP.

If a case owner has changed the status of a case to *Pending Customer*, this means that your input is required. For example, the support team may need you to verify that the desired result has been achieved, or additional information may be needed. If a case has this status, you need to check the case for details and find out what the case owner needs from you.

Closing of a Case

When a support team finishes working on a case, they set the case status to *Closed*. The case can be closed with one of the following reasons, which you can view on any of the case management forms:

- *Resolved*: You have approved the decision or reply (depending on the initial request) of the support team.
- *Rejected*: The support team cannot process the case for some reason (for example, because a third-party product is involved).
- *Canceled*: The case has been canceled by the case owner.
- *Abandoned*: The support team could not resolve the issue because you have not responded or provided the information requested by the case owner.
- *Duplicate*: A similar case exists in the system.
- *Closed on Portal*: You have closed the case in the Self-Service Portal.

You can also close the case in the Self-Service Portal yourself, as described in *To Close a Case*.

If an issue that you have reported in a case recurs or you are not satisfied with the answer from the support team, you can reopen the closed case. To do this, click **Reopen** or **Add Comment** on the form toolbar of the *Case Details* (SP302010) form of the closed case.

To Create a Case

In this topic, you will learn how to create and submit cases in the Acumatica Self-Service Portal. You can use the *New Case* (SP203000) form to enter and submit cases. For more information, see *Case Management*.

To Create a Case

1. Open the *New Case* (SP203000) form.
2. Optional: In the **Contract** box, select a contract from the list.

   > In the box, you can only see the contracts with the **Active** status.

3. In the **Priority** box, select the case priority.
4. In the **Class ID** box, select the case class.
5. In the **Subject** box, enter the subject of the case.
6. On the **Details** tab, in the text editor area, describe the problem that you are reporting.
7. On the **Attributes** tab, select the values for the available attributes. You can also add and remove attributes.
8. Specify the value of each attribute in the **Value** column of the **Attributes** tab.
9. Optional: To attach files to the case, on the form title bar, click **Files** and in the **Files** dialog box, do the following:
   a. Click **Browse**.
   b. In the window that opens, select the needed file.
   c. Click **Upload**. The file is uploaded to the system; notice that the information about the uploaded file is displayed in the table of the dialog box.
   d. Close the dialog box. On the form title bar, you can see the number of attached files in parentheses right of the **Files** button.
10. Optional: To attach a note to the case, click **Notes** on the form title bar and enter the note in the **Enter Record Note** dialog box. Click **OK**.
11. On the form toolbar, click **Submit**.

When you submit the case, the created case opens on the *Case Details* (SP203010) form. The status of the case is set to **New**.

To View and Edit Case Details

In this topic, you will learn how to view and modify cases with the **New** or *Open* status in the Acumatica Self-Service Portal. You can use the *Open Cases* (SP204000) form to view or open the case.

To View and Update the Details of an Open Case

1. Open the *Open Cases* (SP204000) form.
2. In the Selection area, make selections to view open cases based on the user that submitted them:

- To view the open cases you have submitted, leave the **Me** check box selected.
- To view the open cases another user has submitted, clear the **Me** check box and select the user in the **Created By** box.
- To view all open cases submitted by the users of your company, clear the **Me** check box and leave the **Created By** box blank.

3. Optional: In the **Contract** box, select a contract to view the cases associated with the contract, or leave the box blank to view all cases.
4. In the table, click **Case ID** of a case which details you want to view and edit.
5. On the *Case Details* (SP203010) form, which opens, do the following:
   a. In the Summary area, view the case details.
   b. In the **Subject** box, edit the case subject.
   c. Optional: In the **Contract** box, change the contract associated with the case.
   d. In the **Priority** box, change the case priority.
   e. On the **Activity** tab, check the case activities.
   f. To add a note, click **Add Comment** on the form toolbar, and then enter the note contents in the **New Comment** dialog box.
   g. Click **Save and Close**.
   h. On the **Attributes** tab, check the attributes and update them.
   j. To review or edit the details of another case, in the **Case ID** box of the Summary area, select another case in the **Case ID** column of the lookup box.

To Close a Case

In this topic, you will learn how to close a case in the Acumatica Self-Service Portal. You can use the *Open Cases* (SP204000) form to close a case. For more information, see *Case Management*.

To Close a Case

1. Open the *Open Cases* (SP204000) form.
2. In the Selection area, make selections to view open cases based on the user that submitted them:
   - To view the open cases you have submitted, leave the **Me** check box selected.
   - To view the open cases another user has submitted, clear the **Me** check box and select the user in the **Created By** box.
   - To view all open cases submitted by the users of your company, clear the **Me** check box and leave the **Created By** box blank.
3. Optional: In the **Contract** box, select a contract to view the cases associated with the contract, or leave the box blank to view all cases.
4. In the **Case ID** column of the table, click the identifier of the case you want to close. The *Case Details* (SP203010) form opens for the selected case.
5. On the form toolbar, click **Close Case**.
6. In the **Close Case** dialog box, click **Yes**.

To Track Closed Cases

In this topic, you will learn how to track closed cases in the Acumatica Self-Service Portal. You can use the *Closed Cases* (SP204010) form to view all closed cases and to check the details of a particular closed case. For more information, see *Case Management*.

To Track Closed Cases

1. Open the *Closed Cases* (SP204010) form.
2. In the Selection area, make selections to view closed cases based on the user that submitted them:
   - To view the closed cases you have submitted, leave the **Me** check box selected.
   - To view the closed cases another user has submitted, clear the **Me** check box and select the user in the **Created By** box.
   - To view all closed cases submitted by the users of your company, clear the **Me** check box and leave the **Created By** box blank.
3. Optional: In the **Contract** box, select a contract to view the cases associated with the contract, or leave the box blank to view all cases.
4. In the **Case ID** column of the table, click identifier of the case which details you want to view. The *Case Details* (SP203010) form opens for the selected case.
5. To review the details of another case, in the **Case ID** box of the Summary area, select the case with the **Closed** status in the **Case ID** column of the lookup box.

Managing Online Orders

In the Acumatica Self-Service Portal, you can order items online. You can browse the list of items, view detailed item information, place orders, and monitor their progress.

In this chapter, you can find information on how to use the catalog and the shopping cart, and then place and track your orders.

Browsing the Catalog

You can browse the catalog on the *Catalog* (SP700000) form of the Acumatica Self-Service Portal. The catalog contains the list of items that you can add to your shopping cart.

> This functionality appears in the Self-Service Portal, if the *B2B Ordering* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

Item Availability

The catalog provides information about the available quantities of the items in different warehouses. On the *Catalog* (SP700000) form, you can view all the items in the catalog or only the items that are immediately available for ordering. For each item, you can see a short description and the price.

> You can add inventory items to the cart only if the *Inventory* feature has been enabled in your vendor's instance of Acumatica ERP. You can see the catalog and inventory items in the Self-Service Portal even if the *Inventory* feature is disabled; when you click the **Add To Cart** button on the table toolbar, the system displays a warning message.

Additionally, if an item is stored in different warehouses, in the **Warehouse** column, you can select the warehouse you want the item to be shipped from. If the column has a default value, you can keep it or change. For details, see *To Browse the Catalog and Select a Warehouse*.

> This column appears on the form if the *Multiple Warehouses* or *Multiple Warehouse Locations* feature is enabled (or both features are enabled) on the Enable/Disable (CS100000) form in Acumatica ERP.

For a default warehouse to appear in the **Warehouse** column of the *Catalog* form, the following conditions must be met on the *Portal Preferences* (SP800000) form (the **B2B Ordering Settings** tab):

- The **Include in Warehouse List** check box is selected for the warehouse in the table.
- The warehouse is selected as the default one in the **Default Stock Item Warehouse** or **Default Non-Stock Item Warehouse** box (the **General Settings** section).

Search and Filtering Capabilities

In the selection area of the *Catalog* (SP700000) form, you can do the following:

- Search for specific items
- Filter items by category
- Show or hide items that are not available in stock
- Monitor the total cost of the items that you plan to add to your cart

You can select an item category in the **Category** box to narrow the search results. If you are looking for a specific item, you can start typing part of the item's identifier or description in the **Find Item** box. As you type, the table displays the inventory items whose ID or description contains the string you have typed.

Also, you can select the **Show Available Items Only** check box to view the items that are available in stock.

> This check box is shown if the **Show Available Quantities** check box is selected on the **B2B Ordering Settings** tab of the *Portal Preferences* (SP800000) form.

For details, see *To Search for Specific Items*.

Item Descriptions

You can view the detailed information about any item from the list by clicking its identifier in the **Inventory ID** column of the *Catalog* (SP700000) form.

The **Item Details** dialog box, which opens, shows images and the extended description of the item. You can also immediately add the required quantity of the item to the cart.

For details, see *To View an Item's Details*.

To Browse the Catalog and Select a Warehouse

In this topic, you will learn how to view your vendor's catalog, which lists the items available for ordering, and select the warehouse from which you want items to be shipped.

> You can view the *Catalog* (SP700000) form and browse a catalog if you are signed in to the Acumatica Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

To View the Catalog

To browse the catalog, do the following:

1. In the Self-Service Portal, open the *Catalog* (SP700000) form. The list of items in all categories opens.
2. In the **Category** box of the Selection area, select the category of the items you want to view.
3. Select the **Show Available Items Only** check box to view the items that are available for ordering.

   > This check box is shown if the **Show Available Quantities** check box is selected on the **B2B Ordering Settings** tab of the *Portal Preferences* (SP800000) form.

To Select the Warehouse

To view items available for ordering in a particular warehouse and select the warehouse from which you want items to be shipped, while you are still viewing the catalog on the *Catalog* (SP700000) form, do the following:

1. In the table, in the row with the item that you want to add to the shopping cart, double-click the **Warehouse** column and then click the magnifier button.
2. In the **Qty. Available** column of the lookup table that opens, make sure that the item is in stock at the warehouse, and then click the row with the warehouse.
3. In the upper left corner of the dialog box, click the **Select** button. The dialog box closes.

4. In the **This Warehouse** column of the table, review the quantity of items available for ordering in the selected warehouse.

You have browsed the catalog and selected the warehouse from which you want items to be shipped. Now you can add items to the shopping cart and place an order in the Self-Service Portal. For more information, see *To View an Item's Details*.

To View an Item's Details

In this topic, you will learn how to view detailed information about any item listed on the *Catalog* (SP700000) form and add items to your shopping cart.

> ⚠ You can view the *Catalog* (SP700000) form and browse the catalog if you are signed in to the Acumatica Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

To View an Item's Details

To view an item's details, do the following:

1. In the Self-Service Portal, open the *Catalog* (SP700000) form. The list of items in all categories opens.
2. In the **Inventory ID** column, click any item identifier to view the item's details. The **Item Details** dialog box opens.
3. Review the item's extended description and attributes.

To Add Items to the Cart

While you are still in the **Item Details** dialog box viewing an item's details, you will add the required quantity of the item to the shopping cart and select a warehouse. Do the following:

1. In the **Qty.** box, specify the item quantity.
2. Optional: In the **Warehouse** box, select the warehouse from which you want the item to be shipped.
3. Click **Add to Cart**.
4. In the confirmation dialog box that opens, click **Yes** to confirm the adding of the item to the shopping cart. The dialog box closes.

If you are done adding items to the shopping cart, you can go to the shopping cart and place an order in the Self-Service Portal. For more information, see *Using the Shopping Cart* and *Placing Orders*.

To Search for Specific Items

In this topic, you will learn how to search for specific items on the *Catalog* (SP700000) form.

> ⚠ You can view the *Catalog* (SP700000) form and browse a catalog if you are signed in to the Acumatica Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

To Search for Items

1. In the Self-Service Portal, open the *Catalog* (SP700000) form.

2. In the Selection area, in the **Find Item** box, enter the name or part of the name of the item you are searching for.

   Only the items that satisfy the search conditions will be displayed in the table. You can narrow the search by specifying more specific criteria.
3. To narrow your results, in the **Category** box, select a category of the items you want to view.
4. Select the **Show Available Items Only** check box to view the items that are available for ordering.

   > This check box is shown if the **Show Available Quantities** check box is selected on the **B2B Ordering Settings** tab of the *Portal Preferences* (SP800000) form.

Now you can add items to the shopping cart and place an order in the Self-Service Portal. For more information, see *Using the Shopping Cart* and *Placing Orders*.

Using the Shopping Cart

On the *My Cart* (SP700001) form of the Acumatica Self-Service Portal, you can review the items in your cart, return to the *Catalog* (SP700000) form to continue shopping, or proceed to checkout.

You can open your shopping cart by clicking the **Open Cart** button on the *Catalog* (SP700000) form.

> This functionality appears in the Self-Service Portal, if the *B2B Ordering* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

Adding Items to the Cart

You place items in your shopping cart by using the *Catalog* (SP700000) form. First, you select the check box in the **Add to Cart** column of each needed item to make preliminary selections. If needed, you change default settings in the rows with these items. Then you click the **Add to Cart** button on the table toolbar to add the items to your cart. For detailed instructions of this process, *To Add Items to the Shopping Cart*.

When you add items to the cart, the contents of the cart are automatically saved. Even if you sign out of the system, your cart will contain the items that you have added.

You can continue shopping and go back to the *Catalog* form by clicking the **Continue Shopping** button on the form toolbar of the *My Cart* (SP700001) form.

When you have finished adding items to your cart, you click the **Proceed to Checkout** button on the form toolbar. This opens the *Checkout* (SP700002) form, where you can confirm your order and check out. For more information about the checkout process, see *To Add Items to the Shopping Cart* and *Placing Orders*.

Modifying the Contents of the Cart

You can modify the contents of the shopping cart by deleting any added items and changing the quantities of the added items on the *My Cart* (SP700001) form. You can add new items, delete any added items, and change the quantities of the added items on the *Catalog* (SP700000) form.

If you want to remove all items in the cart, you should use the **Clear Cart** button on the *My Cart* form.

For details, see *To Change the Contents of the Cart* and *To Clear Your Cart*.

To Add Items to the Shopping Cart

In this topic, you will learn how to browse the catalog and add selected items to the shopping cart in the Acumatica Self-Service Portal.

> You can view the *Catalog* (SP700000) form and browse a catalog if you are signed in to the Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

To Add Items to the Cart

1. Open the *Catalog* (SP700000) form. In the table, view the list of items in all product categories.
2. In the Selection area, click the **Show Available Items Only** check box to see all items that are currently available to be ordered.

   > This check box is shown if the **Show Available Quantities** check box is selected on the **B2B Ordering Settings** tab of the *Portal Preferences* (SP800000) form.

3. In the table, for every item that you want to add to your cart, do the following :
   a. Select the **Add to Cart** check box.
   b. In the **Qty.** column, specify the quantity of the item that you want to order.
   c. Optional: In the **Warehouse** column, select the warehouse from which you want the item to be shipped. For more information, see *To Browse the Catalog and Select a Warehouse* and *To View an Item's Details*.

   > In the **Selection Total** box of the Selection area, you can see the total cost of the items for which the check box is selected in the **Add to Cart** column of the table.

4. On the table toolbar, click the **Add to Cart** button to add the selected items to the shopping cart.

   When the items have been added to your cart, in the Cart Information area of the *Catalog* form, you can review the quantity and the cost of the items you added to the shopping cart.

You have browsed the catalog and added selected items to the shopping cart. Now you can continue shopping or go to the shopping cart for placing an order in the Self-Service Portal. For more information, see *Placing Orders*.

To Change the Contents of the Cart

In this topic, you will learn how to make changes in your shopping cart in the Acumatica Self-Service Portal.

> You can view the *My Cart* (SP700001) form if you are signed in to the Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

To Make Changes in the Cart

1. In the Self-Service Portal, open the *My Cart* (SP700001) form.

   The items that you have added to your cart are displayed in the table.

2. To change the contents of the shopping cart, do any of the following:

- To change the quantity of an item in the cart, in the **Qty.** column, double-click the quantity of the selected item, type the new quantity, and then press Enter.
- To delete an obsolete item, select its row and click **Delete** on the table toolbar.
- To add new items, click **Continue Shopping** on the form toolbar.

  The *Catalog* (SP700000) form opens. Now you can add new items to the shopping cart. For more information, see *To Add Items to the Shopping Cart*.

You have changed the contents in the shopping cart. Now you can proceed to checkout and place an order in the Self-Service Portal. For more information, see *Placing Orders*.

To Clear Your Cart

In this topic, you will learn how to clear your shopping cart in the Acumatica Self-Service Portal.

You can view the *My Cart* (SP700001) form if you are signed in to the Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

To Clear the Cart

1. In the Self-Service Portal, open the *My Cart* (SP700001) form. In the table, view the items that you have added to the shopping cart.
2. On the form toolbar, click **Clear Cart**.
3. In the **Clear Cart** dialog box, which opens, click **Yes** to confirm that you want to remove all items from the cart.

Your cart is cleared and you can begin the ordering process at your convenience. For more information, see *To Add Items to the Shopping Cart*.

Placing Orders

After you have reviewed the contents of your cart, you can proceed to placing the order in the Self-Service Portal.

This functionality appears in the Self-Service Portal, if the *B2B Ordering* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

Order Placement Process

You can place the order by using the *Checkout* (SP700002) form, which is a wizard that has multiple pages, one for each part of the checkout process. The form opens when you click the **Proceed to Checkout** button on the *My Cart* (SP700001) form.

On the Shipping Details page of the wizard, which is the first page you see, you can review the order details and the shipping information. By default, the shipping information is automatically added from your contact information, but you can select the **Edit Address** check box on the *Checkout* form and enter any location you want. The taxes and the shipping charges are automatically calculated, based on the shipping location, and added to the total cost of the order.

If you need to change the items and their quantities for the order, you should return to your cart by clicking the **Go Back to Cart** button on the form toolbar of the Shipping Details page of the wizard.

You continue placing your order by clicking the **Continue** button on the form toolbar of the Shipping Details page of the wizard. On the Shipping Information Page, which opens, you review and confirm the order information, including the order totals, the shipping information, and the items included in the order.

After you submit your order, a printable version of the created sales order is generated automatically on the Submitted Order Page of the wizard. You can print the sales order or export it to a PDF or to Microsoft Excel.

For detailed instructions, see *To Place an Order*.

Recurring Orders

If you make similar orders regularly, you can copy the contents of an existing order to a new order, as described in *To Copy an Existing Order*.

To Place an Order

In this topic, you will learn how to place an order in the Acumatica Self-Service Portal.

You can view the *My Cart* (SP700001) form if you are signed in to the Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

To Review and Enter Shipping Details

To review the list of items in your cart and enter shipping details for the order, do the following:

1. In the Self-Service Portal, open the *My Cart* (SP700001) form.
2. In the table, view the list of items that you want to order.
3. On the form toolbar, click **Proceed to Checkout**. On the *Checkout* (SP700002) form, the Shipping Details page of the wizard opens.
4. Optional: If you need to change the settings in the **Ship-To Info** section, do the following:
   a. Select the **Edit Address** check box. This gives you the ability to override the default contact information for the shipment.
   b. Do one of the following:
      - To select one of the predefined locations, in the **Location** box, select the location you want the goods to be shipped to.
      - For each setting that needs to be changed, specify the updated information in the needed box.
5. In the **Shipping Information** section, do the following:
   a. In the **Line Total**, **Tax Total**, and **Order Total** boxes, review the order totals calculated for the order you are placing.
   b. In the **Ship Via** box, select a code representing a carrier from the predefined list.
   c. In the **Delivery Date** box, specify the needed delivery date.
   d. Select the **Residential Delivery** check box if the shipment will be delivered to a residential area.
   e. In the **Comment** box, enter any necessary comments.
   f. In the **Ship Complete** box, select the way how shipment should be fulfilled.

If you want to change the contents of the order, click the **Go Back to Cart** button. For more information, see *To Change the Contents of the Cart*.

You have reviewed the list of items and entered shipping details for the order. Now you can proceed to submitting the order.

To Place an Order

To review the shipping information and place the order, while you are still on the Shipping Details page of the wizard, do the following:

1. On the form toolbar, click **Continue**, which opens the Shipping Information page of the wizard. Review the shipping information, totals, and items of the order.

   To make any changes to the order before you submit it, click the **Return to Shipping Detail** button, and then make the necessary changes. For more information, see *To Change the Contents of the Cart*.
2. On the form toolbar, click the **Submit Order** button to place the order in the system. A printable version of the order opens.
3. Review the order information.

   You can review and print the order on the *My Orders* (SP700003) form at any time.

You have reviewed and placed the order in the Self-Service Portal. Now you can proceed to tracking the order. For more information, see *Tracking Orders*.

To Copy an Existing Order

In some cases, you need to quickly create an order based on an existing one in the system.

In this topic, you will learn how to copy the items in an existing order to the shopping cart in the Acumatica Self-Service Portal.

To Copy an Existing Order

1. In the Self-Service Portal, open the *My Orders* (SP700003) form.
2. Click the row with the order you want to copy.
3. On the form toolbar, click **Copy Order to Cart**.

   The system copies the contents of the order to your cart and opens the *My Cart* (SP700001) form. Here you can make additional changes or proceed with placing the order. For more information, see *To Change the Contents of the Cart* and *To Place an Order*.

   You can view the *My Cart* (SP700001) form if you are signed in to the Self-Service Portal with a user account that has the *Customer Admin* or *Customer User* role assigned.

You have copied an order's items to the shopping cart in the Self-Service Portal. Now you can proceed with placing an order. For more information, see *To Place an Order*.

Tracking Orders

After you place an order, you can track the order and its shipments by using the *My Orders* (SP700003) form in the Self-Service Portal.

This functionality appears in the Self-Service Portal, if the *B2B Ordering* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

Tracking an Order

All the orders placed with your company account are displayed on the *My Orders* (SP700003) form.

The status of the order reflects the order processing stage. The order may have one of the following statuses:

- *Open*: The order is processed, but shipment has not yet occurred.
- *Shipping*: At least one shipment for the sales order is confirmed. To learn more, click the row with the order you have placed, and then click **View Shipments** on the table toolbar, to view the shipments and their statuses in the **Shipments** dialog box. For more information, see *To Track a Shipment*.
- *On Hold*: The order processing has been suspended.
- *Credit Hold*: Your account balance has exceeded the credit limit.
- *Back Order*: There is a shortage of at least one item, and the processing of the order may take additional time.
- *Invoiced*: One invoice has been generated (or multiple invoices have been generated) for at least one of the order shipments. The invoices are available on the *My Documents* (SP402000) form. For more information on printing invoices, see *To Print an Invoice or Credit Memo*.
- *Completed*: All invoices have been generated for all related shipments. The invoices are available on the *My Documents* (SP402000) form.
- *Canceled*: The order has been canceled. You may have canceled the order yourself, as described in *To Cancel an Order*.

For details about how to track a particular order, see *To Track an Order*.

Canceling an Order

In the Self-Service Portal, you can cancel an order that has not been processed—that is, an order with the *Open*, *On Hold*, or *On Credit Hold* status. To cancel the order, you select the row with the order and click **Cancel Order** on the table toolbar of the *My Orders* (SP700003) form.

For details, see *To Cancel an Order*.

Tracking Shipments

You can track the shipments for the orders on the *My Orders* (SP700003) form. To do this, you select the row with the order and click **View Shipments** on the table toolbar. In the **Shipments** dialog box, which opens, you can see the shipments associated with the order.

The status of the shipment is changed to one of the following as the shipment is processed:

- *Open*: The shipment is being prepared—that is, items are being picked and packed.
- *On Hold*: The processing of the shipment has been temporarily stopped.
- *Confirmed*: The shipment has been confirmed as shipped.
- *Completed*: The shipment has been delivered and the invoice has been generated for the system.

You can open and print the shipping confirmation by clicking the applicable shipment number in the **Shipment Nbr.** column of the **Shipments** dialog box.

The the printable version of the shipment confirmation includes the company information (on the top left), the ship-to address of the customer, the required shipping information, and the itemized information about the items and the quantities being shipped.

For more information, see *To Track a Shipment*.

To Track an Order

In this topic, you will learn how to track and print an order in the Acumatica Self-Service Portal by using the *My Orders* (SP700003) form. You can view such information as the delivery date, the shipments, the quantities of items, and the total amount of the order.

To Track and Print an Order

1. In the Self-Service Portal, open the *My Orders* (SP700003) form.

   All the orders placed with your company account are displayed in the table.
2. Find the order you want to track, and note its status in the **Status** column.
3. Review the listed settings of the order, such as the date, delivery date, ordered quantity, and total amount of the order. Click the row with the order.
4. On the form toolbar, click **Print Order** to print the order or export it to a PDF or to Microsoft Excel.

To Cancel an Order

In this topic, you will learn how to cancel an order in the Acumatica Self-Service Portal. You can cancel any order that has not been processed—that is, an order with the *Open*, *On Hold*, or *On Credit Hold* status.

To Cancel an Order

1. In the Self-Service Portal, open the *My Orders* (SP700003) form.

   All the orders placed with your company account are displayed in the table.
2. Click the row with the order you want to cancel to select it; it must have the *Open*, *On Hold*, or *On Credit Hold* status.
3. On the form toolbar, click **Cancel Order**.
4. Review the status of the order, which is changed to *Canceled*.

To Track a Shipment

In this topic, you will learn how to track a shipment in the Acumatica Self-Service Portal. You will also print a shipment confirmation.

To Track a Shipment

1. In the Self-Service Portal, open the *My Orders* (SP700003) form.

   All the orders placed with your company account are displayed in the table.
2. Click the row with the necessary order to select it, and then click **View Shipments** to see all shipments associated with the order. The **Shipments** dialog box opens.
3. In the dialog box, review the shipment's number, status, date, and location.

4. In the **Shipment Nbr.** column, click the shipment identifier. On the *Shipment Confirmation* (SO642000) form, the printable version of the shipment confirmation opens.
5. Review the main shipment information, such as the ship-to address, the warehouse from which items are shipped, and the itemized information about the quantities of the items shipped.
6. On the form toolbar, click **Print** to print the shipment confirmation.

   You can export the shipment confirmation to a PDF or to Microsoft Excel by clicking **Export** on the form toolbar.

Self-Service Portal Forms

Each topic in this chapter provides reference information about a particular form related to the Acumatica Self-Service Portal. This information includes details about the use of the form and all of its parts, including areas, tabs, and toolbars. Each user interface element on the form is described, including buttons, commands, boxes, and check boxes.

Case Details

Form ID: (SP203010)

On this form, you can view the details and progress of a case, enter additional information, and close or reopen the case.

In the Self-Service Portal, you can open the current form by clicking a case identifier in the **Case ID** column of the All Cases (GIP00000) list of record.

Form Toolbar

The form toolbar includes standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*. The form-specific buttons are listed below.

Button	Description
Add Comment	Opens the **New Comment** dialog box so that you can enter a comment about the selected case.
Close Case	Closes the selected case. The system changes the case's status to *Open* and the reason to *Pending Closure*. This button appears for a new and open case only.
New Support Case	Goes to the *New Case* (SP203000) form so that you can create and submit a case.
Reopen	Reopens the selected case.

Table: New Comment Dialog Box

This dialog box opens when you click **New Comment** on the form toolbar. You use this dialog box to enter a new comment about the selected case. When you add a comment, the system displays it in the table on the **Activities** tab.

Element	Description
This dialog box has the following elements.	
Summary	A summary of the new comment, which the system composes based on the entered comment. You can see the summary on the **Activities** tab of the current form.

Element	Description
Comment	An unlabeled text area where you can enter your comment about the case. You can see the comment in the bottom part of the **Activities** tab of the current form when you click the row with the comment on this tab.
This dialog box has the following buttons.	
Save and Close	Saves your comment and closes the dialog box.
Close	Closes the dialog box without saving the comment.

Summary Area

In this area, you can specify or modify basic settings of the selected case.

Element	Description
Case ID	The unique identifier the system has assigned to the case.
Reported On	The date and time of the case creation. When you submit the case, the system automatically inserts the current date and time.
Last Activity	The date and time of the most recent activity on the case, that the system inserts automatically.
Assigned To	The support team member the case is assigned to.
Subject	A description of the case.
Class ID	The class the case belongs to.
Business Account	The customer associated with the case, that the system inserts automatically.
Contract	The contract associated with the case.
Contact	The user associated with the case.
Status	The status of the case. This box contains one of the following options: • *New*: The case has been created in the system, but no work has been done on it yet. • *Open*: The case is being worked on by the support team. • *Closed*: Your problem has been resolved, a solution has been found, or no further work is expected to be done on the case. A case with this status has the *Closed on Portal* reason.
Reason	The reason why the status of the case has been changed.
Severity	The severity level of the case. The following options are available: *Low*, *Medium*, and *High*.
Priority	The priority of the case. The following options are available: *Low*, *Medium*, and *High*.

Activities Tab

This tab has a table with the list of the activities associated with the case. When you add a comment, the system displays it in the table. You can click any activity to view the contents of the comment in the lower area of the tab.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar*.

Table: Table Columns

Column	Description
Type	The type of the activity, which can be one of the following: *Note*, *Email*, *Event*, *Chat*, *Message*, or *Phone Call*.
Summary	The brief description of the activity.
Start Date	The start date and time of the activity.
Created At	The date and time when the activity was created.
Created By	The username of the person who created the activity.

Case Description Tab

This tab has a description of the case.

The description appears on the tab of the current form in the following cases:

- When a user created a case and entered the details of the case on the **Details** tab of the *New Case* (SP203000) form.
- When an employee of the support team has entered or overwrote the details of the case on the **Details** tab of the Cases (CR306000) form in Acumatica ERP.

Attributes Tab

On this tab, you can view and update the values for the attributes associated with the case. *Attributes* are elements that hold additional information about the case. The list of available attributes is defined by the case class selected in the **Class ID** box.

Once you select an attribute for the case on this tab, it appears on the **Attributes** tab of the Cases (CR306000) form in Acumatica ERP and can be viewed by the staff member.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Table: Table Columns

Column	Description
Required	A check box that indicates (if selected) that this attribute has been defined as required. That is, a value must be specified.
Attribute	The attribute for this case.
Value	The value of the attribute that has been specified for the case.

Catalog

Form ID: (SP700000)

On this form, you can browse the full list of items, view the descriptions of the items, search for specific items, and add the items you want to buy to your cart.

Form Toolbar

The form toolbar includes a form-specific button.

Button	Description
Open Cart	Goes to the *My Cart* (SP700001) form, which displays the items you have added to your cart and the order's subtotal.

Selection Area

By using this area, you can search for specific items, filter items by category, show or hide the items that are not available in stock, and monitor the amounts of the items you plan to add to your cart.

Element	Description
Cart Information area	An area that displays the quantity of items in your cart and their total cost.
Find Item	A box in which you can start typing part of the item's identifier or description. As you type, the table displays the inventory items whose ID or description contains the string you have typed.
Category	The category whose items you want to view.
Selection Total	The total cost of the items for which the check box is selected in the **Add To Cart** column of the table.
Show Available Items Only	A check box that you select to view only items that are in stock. This check box is visible if the **Show Available Quantities** check box is selected on the **B2B Ordering Settings** tab of the *Portal Preferences* (SP800000) form.

Table

In this table, you can browse the items, view detailed information about available items, and make preliminary selections by selecting the check box in the **Add to Cart** column for any item. When you click the **Add to Cart** button on the table toolbar, the selected items are added to your cart.

You can add inventory items to the cart only if the *Inventory* feature is enabled on the Enable/Disable Features form (CS100000) in Acumatica ERP. If this feature is disabled, you can see the catalog and inventory items in the Self-Service Portal, but when you click the **Add to Cart** button, the system will display a warning message.

Table: Table Buttons

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see *Table Toolbar Overview*. The table-specific buttons are listed below.

Column	Description
Refresh	Updates the information in the table.
Add to Cart	Adds to the cart the items in the table for which you have selected the **Add to Cart** check box and specified a nonzero quantity. When each item is added to the cart, the **Add to Cart** check box is cleared for the item, and the item's quantity is changed to *0.00* again.

Table: Table Columns

Column	Description
Add to Cart	A check box that you select to indicate that the entered quantity of the item should be added to the cart when you click **Add to Cart** on the table toolbar. Note that when you select this check box, it is a preliminary selection until you click the **Add to Cart** button: The item is not yet added to the cart, but the amount in the **Total** column is included in the **Selection Total** in the Selection area.
Qty.	The quantity of units of the item to be added to your cart, measured in the unit of measure specified in the **Unit** column. By default, the column contains *0.00*. You must specify the needed quantity before you add the item to the cart.
Inventory ID	The identifier of the stock or non-stock item available for purchase. You can click the ID to open the **Item Details** dialog box and view the detailed description of the item.
Description	A description of the item.
Price	The price of a single unit of the item.
Unit	The unit of measure (UOM) used for the item. If multiple units are available, you can view the available UOMs and select the one that you need.
Discount Pct, %	The percent of the discount based on the line amount or quantity.
Discount Amt.	The discount amount based on the line amount or quantity.
Total	The amount calculated for the item, which is the unit price multiplied by the quantity.
All Warehouses	The quantity of the item available in all warehouses.
This Warehouse	The quantity of the item that is available in the warehouse specified in the **Warehouse** column. ⚠ This column appears on the form if the *Multiple Warehouses* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

Column	Description
Warehouse	The default warehouse from which the specified item should be delivered. The default warehouse for your company is inserted in this column if both of the following conditions are met on the *Portal Preferences* (SP800000) form (the **B2B Ordering Settings** tab): • The **Include in Warehouse List** check box is selected for the warehouse in the table. • The warehouse is selected as the default one in the **Default Stock Item Warehouse** or **Default Non-Stock Item Warehouse** box (the **General Settings** section). ⚠ These boxes appear on the *Portal Preferences*form if the *Multiple Warehouses* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP. You can select another warehouse in the column from the list of available warehouses. ⚠ This column appears on the form if the *Multiple Warehouses* or *Multiple Warehouse Locations* feature is enabled (or both features are enabled) on the Enable/Disable (CS100000) form in Acumatica ERP.

Table: Item Details Dialog Box

This dialog box has more information about the selected item, which may include images. You can use the dialog box to add the required quantity of the item to the cart. You open this dialog box by clicking the identifier of the item in the **Inventory ID** column of the current form.

Element	Description
The dialog box contains the following areas and elements.	
Image area	An area where you can view any images associated with the item. You can click the arrows to the right and to the left of the image to view additional images. The images for the item are specified in Acumatica ERP in the Image area of the Stock Items (IN202500) or Non-Stock Items (IN202000) form (**Attributes** tab).
Description area	The detailed description of the item. The description of the item is specified in Acumatica ERP on the **Description** tab of the Stock Items (IN202500) or Non-Stock Items (IN202500) form.
The dialog box also has the **Attributes** table, where you can view any attributes that apply to the item and their values. The attributes listed in the table are those specified for the item class, and their values have been specified for the item on the **Attributes** tab of the Stock Items (IN202500) or Non-Stock Items (IN202000) form in Acumatica ERP. This table has the following columns.	
Attribute	The attribute available for this item.
Value	The value of the attribute that has been specified for the item.

Element	Description
The dialog box also has elements you can use to add the item to your cart. You specify the quantity of the item (and the unit of measure, if the item can be purchased in different units); you then click the **Add to Cart** button.	
Qty.	The quantity of this item that you want to add to your cart.
Unit	The unit of measure of the item you are adding to your cart.
Add to Cart	A button that you click to add the item to your cart in the specified quantity and unit of measure.

Checkout

Form ID: (SP700002)

You can use this form, which is a wizard consisting of multiple pages, to review and submit your order.

The form opens when you click the **Proceed to Checkout** button on the form toolbar of the *My Cart* (SP700001) form.

By using the wizard, you can do any of the following:

- Specify or change the shipping information and confirm the order totals
- Submit the order
- Print the submitted order or export it to a PDF or to Microsoft Excel

Shipping Details Page

On this page of the wizard, you specify and review the shipping settings, including the ship-to information and the totals associated with the order. These totals, including the shipping charges and taxes, are calculated in accordance with the shipping terms.

You can open this page by doing either of the following:

- Clicking the **Proceed to Checkout** button on the *My Cart* (SP700001) form. This is the first page you see in the wizard.
- Clicking the **Return to Shipping Details** button on the Shipping Information page of the wizard.

Table: Form Toolbar

The form toolbar includes only form-specific buttons, as listed below.

Button	Description
Continue	Goes to the Shipping Information page of the wizard, where you can confirm the details of your order and submit it.
Go Back to Cart	Closes the current form (that is, the wizard) and opens the *My Cart* (SP700001) form, where you can change the item quantities, delete items, or clear the cart.

Button	Description
Return to Shipping Detail	Returns you to the current page so that you can make any needed changes. This button is available only on the Shipping Information page of the wizard.

Table: Ship-To Info Section

In this section, you can edit the shipping address. By default, the system inserts the contact information that has been entered into the system.

Element	Description
Location	The predefined location where you want the items to be delivered. You can select one of the predefined locations or select the **Edit Address** check box and enter another address.
Edit Address	A check box that you select to override the default contact information.
Account Name	The legal business name of your company, as registered with the appropriate tax agency. This is the name that will appear on the documents of the company.
Attention	The attention line as it is used in your company's business letters, which would be used to direct a letter to the intended recipient of a letter. The box may contain something like *Purchase Orders Department* or the recipient's name.
Phone 1	The phone number of your company.
Email	Your company's email address.
Address Line 1	The first address line of the company's address. The default value is copied from the **Main Address** section of the *Company Profile* (SP408030) form.
Address Line 2	The second address line of the company's address. The default value is copied from the **Main Address** section of the *Company Profile* (SP408030) form.
City	The city of your company's address.
Country	The two-letter code representing the country of your company. You can clear the **Edit Address** check box and select a code representing the country from the predefined list.
State	The state of the company address. You can clear the **Edit Address** check box and select a code representing the state from the predefined list.
Postal Code	The postal code included in the company's postal address.

Table: Shipping Information Section

Element	Description
Line Total	The total amount on all lines of the order.
Freight Price	The freight amount calculated in accordance with the shipping terms.
Tax Total	The total amount of tax calculated for the order.

Element	Description
Document Discounts	The sum of the discounts that are calculated for items.
Order Total	The total amount of the order.
Ship Via	The list of codes to identify the carriers and services to be used for shipping items. You can select a code representing a carrier from the predefined list.
Delivery Date	The date of the planned delivery of the shipment. You can specify another delivery date in the calendar.
Residential Delivery	A check box that you select to indicate that the shipment will be delivered to a residential area.
Use Customer's Account	A check box that you select to indicate to the system that the carrier specified in the order will charge the customer, not your company, for shipping.
Ship Complete	The way the order should be fulfilled for this customer at this location. You can use one of the following options: • *Completely*: The required quantity of all items should be delivered in one shipment. • *What's Available*: The ordered quantity of all items should be delivered in one shipment, but if the ordered quantity is not available, the available quantity is shipped and the remaining quantity is canceled. • *Available and Back Order*: The ordered quantity can be delivered in multiple shipments. If the ordered quantity is not available, the available quantity is shipped, and the remaining quantity (open quantity) can be shipped later. If this option is selected, when the partial quantity has been shipped, the system assigns the order the **Back Order** status.
Comment	Your comments and additional notes to the order.

Shipping Information Page

On this page, you review and confirm the order information, including the order totals, the shipping information, and the items included in the order.

You open the current page by clicking the **Continue** button on the Shipping Details page of the wizard.

Table: Form Toolbar

The form toolbar includes only form-specific buttons, as listed below.

Button	Description
Submit Order	Submits your order and goes to the Submitted Order page, where you can print or export the order.
Return to Shipping Detail	Returns you to the Shipping Details page, where you can review (and correct, if needed) the shipping information.

Table: Shipping Information Section

Element	Description
Text box	This box contains the shipping information: • The shipping address • The name of the company • The Ship Via code • The delivery date

Table: Totals Section

In this section, you can review the order totals.

Element	Description
Cart Total	The total amount on all lines of the order.
Freight	The freight amount, which has been calculated in accordance with the shipping terms.
Tax Total	The total amount of tax calculated for the order.
Discount Total	The sum of the discounts that are calculated for items.
Total	The total amount of the order.

Table: Table

In this table, you can review the contents of the order.

Column	Description
Inventory ID	The unique identifier the system has assigned to the item.
Description	A brief description of the item.
Qty.	The quantity of the item in the cart, measured in the unit of measure specified in the **Unit** column.
Price	The price for a single unit of the specified item.
Unit	The unit of measure of the item.
Discount Amt.	The total amount of the discount that has been calculated for the order.
Total	The total amount of the order.

Submitted Order Page

On this page, the system displays the submitted sales order as a ready-to-print document. The document provides the company information (in the top left), the ship-to and bill-to addresses, the pertinent shipping information, and the itemized information about the items to be shipped.

You can print the sales order or export it to a PDF or to Microsoft Excel.

Also, at any later time, you can review and print the order on the *My Orders* (SP700003) form.

Closed Cases

Form ID: (SP204010)

On this form, you can make quick inquiries about closed cases that had been submitted by your company's users.

You can use the Selection area to specify the criteria of the cases you want to view in the table. You can click any case identifier in the table to open the *Case Details* (SP203010) form and view the details of the case.

Form Toolbar

The form toolbar includes only standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*.

Selection Area

You can use the elements in this area to limit the cases that are listed in the table.

Element	Description
Created By	A box and the **Me** check box, which you can use as follows: • Select the **Me** check box to view those cases that you created. • Clear the **Me** check box and select another user to view those cases that the selected user created. • Leave the box blank and clear the check box to view the closed cases owned by all of your company's users.
Contract	The contract associated with the cases you want to view.

Table

In this table, you can view the list of closed cases that meet the criteria specified in the Selection area.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Case ID	The identifier of the case, which is also a link to the case. If you click the link, the system opens the case on the *Case Details* (SP203010) form.
Subject	The short description of the case that was provided when the case was reported.

Column	Description
Status	The status of the case, which the system assigns automatically based on user (on the Self-Service Portal) or staff member actions (in Acumatica ERP) during the case workflow. The status can be one of the following: • *Closed*: The customer's problem has been resolved, a solution has been found, or no further work is expected to be done on the case. • *Released*: The AR invoice for the work performed has been generated for the customer on the Invoices and Memos (AR301000) form in Acumatica ERP.
Reason	The reason for the status of the case. The reason can be one of the following: • *Closed on Portal*: The user closed the case on the Self-Service Portal. • *Resolved*: The staff member resolved the case in Acumatica ERP.
Contract	The contract the case is associated with.
Severity	The severity level of the case.
Priority	The priority of the case. The following options are available: *Low*, *Medium*, and *High*.
Class ID	The class the case belongs to.
Full Name	The user who created the case.
Last Activity	The date of the last activity on the case.
Contact	The employee of your company who created the case.
Account ID	The ID of the business account associated with the case.
Account Name	The name of the business account associated with the case.

Company Profile

Form ID: (SP408030)

On this form, you can check and update your company's contact information, such as the official website, phone number, and address.

To edit the information on this form, you must be signed in to the Self-Service Portal instance with a user account that has any of the following roles assigned to it: *Customer Admin*, *Administrator*, or *Portal Admin*.

Form Toolbar

The form toolbar includes only standard buttons. For the list of standard buttons, see *Form Toolbar Overview*.

Summary Area

In this area, you can specify or modify the basic settings of your company.

Table: Main Contact Section

This section contains the main contact information of your company, which are initially copied from its record on the Customers (AR303000) form of Acumatica ERP. A user with the *Customer User* role cannot modify these settings.

Element	Description
Account Name	The legal business name of your company, as registered with the appropriate tax agency. This is the name that appears on the documents of the company.
Attention	The attention line as it is used in your company's business letters, which would be used to direct mail to the intended recipient. The box may contain something like *Purchase Orders Department* or the recipient's name.
Email	Your company's email address.
Web	The URL of your company's official website.
Phone 1	The primary phone number of your company.
Phone 2	The secondary phone number of your company.
Fax	The fax number of your company.

Table: Main Address Section

This section contains the main address settings of your company.

Element	Description
Address Line 1	The first address line of your company.
Address Line 2	The second address line of your company.
City	The city of your company.
Country	The two-letter code representing the country of your company. You can select a code from the predefined list.
State	The two-letter code representing the state of your company's address. You can select a code from the predefined list.
Postal Code	The postal code included in your company's address.

Contact

Form ID: (SP408041)

On this form of the Acumatica Self-Service Portal, you can do the following:

- Create a contact of your company and enter or edit the contact's settings.

  Any changes you make to a contact are reflected on the Contacts (CR302000) form of Acumatica ERP when you save these changes.

  > ⚠ Additions or changes to the user settings on this form are reflected on the Users (SM201010) form in Acumatica ERP.

- Enter the settings that cause the system to create a Self-Service Portal user account associated with the contact, including the username and the user type of the user account linked to the contact.
- Enable or disable the user account. Thus, a contact on this form may be a current Self-Service Portal user, a prospective user that has not been enabled, or a former user that has been disabled.

You can open this form in any of the following ways:

- By clicking the **Add New** button on the *Contacts* (SP408040) form.

  > ⚠ The *Contacts* form is available only for users with the *Customer Admin*, *Administrator*, or *Portal Admin* roles.

- By clicking a contact in the **Contact** column of the *Contacts* form.
- By clicking the *Contact* (SP408041) form in the workspace or using the search.

> ⓘ If your user account has the *Customer User* role assigned but none of the administrative roles, you can see contacts on the form, but can edit only your own contact settings.

Summary Area

In this area, you can create a new contact or select an existing contact for editing.

Element	Description
Contact ID	The identifier of the contact, which the system generates automatically when a new contact is saved, based on the entered name and courtesy title. When you create a contact, leave this box blank. You can change the identifier by editing the name information in the **Last Name** box of the **Details** tab, if needed.
Active	A check box you select to activate the contact. You can clear the check box to disable the contact.

Details Tab

On this tab, you can enter, review, and change the basic settings of the contact.

Table: Summary Section

This section contains the summary settings of the contact.

Element	Description
First Name	The contact's courtesy title (which is *Dr.*, *Miss*, *Mr.*, *Mrs.*, *Ms.*, or *Prof.*) and first name.
Last Name	The last name of the contact.

Element	Description
Job Title	The job title or position of the contact in your company.

Table: Contact Section

This section contains the settings used to communicate with the contact.

Element	Description
Email	The email address of the contact.
Web	The website of the contact.
Phone 1	The primary phone number of the contact.
Phone 2	An additional phone number of the contact.
Phone 3	Another phone number of the contact.
Fax	The fax number of the contact.

Table: Address Section

This section contains the contact's address settings.

Element	Description
Same as in Account	A check box that you select to populate the contact's address with the address of your company. If this check box is selected, the system populates the boxes in this section with the address settings that are specified in the **Main Address** section of the *Company Profile* (SP408030) form.
Address Line 1	The first address line of the contact.
Address Line 2	The second address line of the contact.
City	The city of the contact's address.
Country	The two-letter code representing the country of the contact's address. You can select a code from the predefined list.
State	The two-letter code representing the state of the contact's address. You can select a code from the predefined list.
Postal Code	The postal code included in the contact's address.
View on Map	A button you can click to view this address on the map provided by the Google Maps or Azure Maps web map service. The map is opened in a new window.

User Info Tab

On this tab, you can create and manage the user account associated with the contact.

Table: Personal Settings Section

This section contains the time zone of the contact.

Element	Description
Time Zone	The contact's time zone, which will be used to display the time stamps when the contact uses the Self-Service Portal. If a time zone is specified for the user, these time stamps will be converted to the user's specified time zone. If no time zone is specified, documents will be time-stamped by using the time settings on the server.

Table: User Information Section

This section contains the settings of the user account associated with the selected contact.

Element	Description
Status	A box that shows the status of the user account. The following options are available: • *Not Created*: The contact is not associated with any user account. • *Active*: The user account is active. That is, it has been enabled. The user account is assigned this status when you have clicked the **Enable User** button. • *Online*: The user has been enabled and is signed in to the system. • *Disabled*: The user account has been disabled. The system assigns this status to the user account when you have clicked the **Disable User** button. • *Temporarily Locked*: The active user account is temporarily locked out.
User Type	The user type of the user, which determines the set of roles available to the user and the creation rules of the user account. In this box, you select a user type that has been created on the User Types (EP202500) form of Acumatica ERP.
Login	The username for signing in to the Self-Service Portal. If no user account has yet been defined for the contact, the box is empty.
Password	The password the new user should use when initially signing in. This box appears during the creation of the user account. The box is available only if you clear the **Generate Password** check box.
Generate Password	A check box that you select to have the system generate the password automatically. This check box appears only during the creation of a new user account.
Reset Password	A button that you can click to open the **Reset Password** dialog box. You can reset the password for the selected user and enter a new one. The button is available only after the user account has been created.
Enable User	A button that you click to enable the selected user account.
Disable User	A button that you click to disable the selected user account.
Unlock User	A button that you click to unlock the user account if the system temporarily locked it.

Table: Table

In this table, you can assign any number of user roles to the user. The list of available roles is determined by the selected user type.

A user must have at least one role assigned to gain access to the system.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*

Element	Description
Selected	A check box that you select to assign the user role to the selected user.
Role Name	The name of the user role.
Role Description	The description of the user role.

Table: Reset Password Dialog Box

You can use this dialog box, which is opened when you click the **Reset Password** button, to reset the password for the selected user.

The dialog box opens when you click the **Reset Password** button.

Element	Description
The dialog box contains the following elements.	
New Password	The new password for the selected user.
Confirm Password	The new password for the selected user, which you retype to confirm it to the system.
The dialog box has the following buttons.	
OK	Replaces the password with the new one and closes the dialog box.
Cancel	Closes the dialog box without saving any entered settings or resetting the password.

Contacts

Form ID: (SP408040)

On this form, you can see your organization's contacts, which are users that can access the Acumatica Self-Service Portal. These users are defined on the Contacts (CR302000) form in Acumatica ERP. The system inserts the information it copies from the Contacts form of Acumatica ERP by default.

You can click the **Add New** button to open the *Contact* (SP408041) form in the Self-Service Portal and create a contact, as well as a Self-Service Portal user account associated with the new contact.

You can click a contact in a row to open the individual contact on the *Contact* form to view or edit it.

To access the current form, you must be signed in to the Self-Service Portal instance with a user account that has any of the following roles assigned: *Customer Admin*, *Administrator*, or *Portal Admin*.

Form Toolbar

The form toolbar includes standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*. The form-specific button is listed below.

Button	Description
Add New	Opens the *Contact* (SP408041) form, which you can use to enter the settings of the contact and create a user account associated with the contact.

Selection Area

You can use the element in this area to narrow the range of contacts listed in the table.

Element	Description
Selection box	A box in which you can start typing part of a contact's name. As you type, the table displays the contacts whose name contain the string you have typed. You can leave this box blank to view the list of all contacts.

Table

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Contact	The name of the contact and a link that you can click to open the individual contact on the *Contact* (SP408041) form.
Job Title	The job title or position of the contact in your company.
Email	The email address of the contact.
Phone 1	The phone number of the contact.
Login	The username for authorization within the Self-Service Portal. This column is empty if no user account has been created for the contact yet.
User Type	The user type of the user, which determines the set of roles available to the user and the creation rules of the user account. User types are defined on the User Types (EP202500) form of Acumatica ERP.
Active	A read-only check box, which reflects whether the contact is active. You can clear or select the **Active** check box on the *Contact* (SP408041) form to change the status of the contact.

Contract

Form ID: (SP301000)

On this form, in the Acumatica Self-Service Portal, you can view the details of a particular contract that has been created in Acumatica ERP.

The contract settings are provided for your information only; you cannot edit them. Depending on the contract, you may see some or all of the form elements described below.

Some contracts may not be visible to you.

Contract Information Area

In this area, you can select an existing contract and view its primary information.

Element	Description
Contract ID	The identifier of a contract in Acumatica ERP. Select a contract ID in this box to view the details of the contract.
Contract Template	The contract template that this contract was based on. This box appears if your company's customer account is billed for contract items.
Status	The status of the contract, which is one of the following options: • *Draft*: The contract has not been activated and cannot be used. • *Pending Approval*: The contract is in the approval process. • *Pending Activation*: The contract is set up and needs to be activated so that you can start providing services and initiate recurring billing (if required). • *Active*: The contract is activated and should be used as the basis for billing. • *Expired*: The contract has expired. A renewable contract with this status can be renewed within the grace period (the period of time after the expiration date). • *Pending Upgrade*: The contract is being prepared for upgrade and can be edited or billed.
Customer	The customer associated with the contract.
Location	The customer location that is specified in the **Location** box of the Customer Contracts (CT301000) form in Acumatica ERP.
Description	The description of the contract, which includes any related comments.
Balance	The sum of the open invoices associated with the contract. This box appears if the selected customer account is billed for contract services.

Summary Tab

On this tab, you can view the summary settings of the selected contract.

Table: Contract Settings Section

This section holds the basic settings of the selected contract.

Element	Description
Setup Date	The contract setup date.
Activation Date	The contract activation date. This box appears if the selected customer account is billed for this contract.
Expiration Date	The date when the contract expires.
Termination Date	The date when the contract was canceled, if applicable.
Currency	The base currency used in operations with your company, which you can select from the list of currencies defined in the system. This box appears on the form if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.
Grace Period	The period of time after the expiration date when services under the contract are provided and a contract may be concluded for a new term.

Table: Billing Information Section

In this section, you can view the billing information associated with the contract.

Element	Description
Account	The specific business account that is to be billed for the current contract.
Location	Your company's location associated with the contract. This box appears if the customer account is defined to be billed for contract services.

Table: Billing Schedule Section

In this section, you can view the billing schedule information associated with the contract. This section appears if the customer account is billed for contract services.

Element	Description
Billing Schedule Starts On	The start date of the first billing period.
Billing Period	The type of billing schedule, which can be one of the following options: *Week*, *Month*, *Quarter*, *Year*, or *On Demand*. The *On Demand* option means that billing is not scheduled and the contract can be billed on any date. The invoice date is calculated based on the selected option and the contract's start date.
Last Billing Date	The date when the billing was performed most recently.
Next Billing Date	The date of the next billing invoice according to the billing schedule.

Details Tab

On this tab, you can view the contract items provided under the contract.

Table: Details Elements

These elements appear if the customer account is defined to be billed for contract services.

Element	Description
Effective From	The date when the contract was set up.
Promo Code	The code of any discount to be applied.
Pending Setup	The sum of the prices of the included contract items for setup. The box is displayed if the contract has the *Draft* or *Pending Upgrade* status.
Pending Recurring	The sum of the prices of the included contract items that are recurring. The box is displayed if the contract has the *Draft* or *Pending Upgrade* status.
Pending Renewal	The sum of the prices of the included contract items for renewal. The box is displayed for a contract with the *Draft* or *Pending Upgrade* status.
Total Pending	The total amount of the pending contract items. The box is displayed for a contract with the *Draft* or *Pending Upgrade* status.
Current Setup	The sum of the prices of the included contract items for setup. The box is populated on contract activation.
Current Recurring	The sum of prices of the included contract items that are recurring. The box is populated on contract activation.
Current Renewal	The sum of prices of the included contract items for renewal. The box is populated on contract activation.

Table: Table

This table shows the contract items included in the selected contract.
The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Item Code	The identifier of the contract item.
Description	A description of the item.
Included	The quantity of this contract item that is included in the contract by default.
Difference	The quantity difference in case of contract upgrade or downgrade. This box appears if the customer account is defined to be billed for contract services.
Setup Price	The contract item price for setup. This box appears if the customer account is defined to be billed for contract services.
Setup Discount, %	The discount percent applied to the setup price. This box appears if the customer account is defined to be billed for contract services.

Column	Description
Recurring Price	The contract item recurring price. This box appears if the customer account is defined to be billed for contract services.
Recurring Discount, %	The discount percent applied to the recurring price. This box appears if the customer account is defined to be billed for contract services.
Renewal Price	The contract item price for renewal. This box appears if the customer account is defined to be billed for contract services.
Renewal Discount, %	The discount percent applied to the renewal price. This box appears if the customer account is defined to be billed for contract services.

Recurring Summary Tab

This tab lists the contract items that have a recurring price configured. The tab appears if the customer account is defined to be billed for contract services.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Table: Recurring Summary Elements

The tab contains the following elements, which display totals.

Element	Description
Recurring Total	The total sum to be billed during the current billing period.
Extra Usage Total	The total sum to be billed for extra usage during the current billing period.
Total Due	The total amount to be billed during the current billing period.

Table: Table

This table displays the list of contract items with a recurring price specified.
The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Item Code	The identifier of the contract item.
Description	A description of the item.
Inventory ID	The identifier of the non-stock item a customer is billed for on a recurrent basis.
UOM	The unit of measure used for billing.
Billing Type	The item billing policy of the contract item.
Included	The item quantity that is billed for at the recurring price.
Recurring Price	The recurring price of the item.
Recurring Discount, %	The discount percent applied to the recurring price.

Column	Description
Extra Usage Price	The item quantity that the customer is billed for at the extra usage price.
Unbilled	The unbilled item quantity.
Used Total	The item quantity used from contract activation through current business date.

Contract History Tab

The tab displays a list of actions that have been performed during the duration of the contract. This tab appears if the customer account is defined to be billed for contract services.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Action	The action that was performed.
Date	The date when the action was performed.
User	The user who performed the action.
Related Contract	The identifier of the related contract, if applicable. A related contract is either one that derived from the current contract or one that served as a source for the current contract.

AR History Tab

The tab, which displays the list of documents related to the contract, appears if the customer account is defined to be billed for contract services.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Table: Table Columns

Column	Description
Type	The type of accounts receivable document.
Reference Nbr.	The reference number of the document.
Post Period	The financial period to which the document transactions are posted.
Date	The date of the document.
Due Date	The due date of the document.
Status	The status of the document.
Amount	The amount of the document.
Balance	The balance of the invoice, if it has been partially paid.

Column	Description
Payment Method	The default payment method for the customer.

Customer Account

Form ID: (SP408032)

On this form, acting as an employee of the company that uses the Acumatica ERP instance, you can create customer contacts. In the Self-Service Portal, you can open the form by clicking a business account identifier on the *Customer Accounts* (SP408033) form.

Customer contacts are the employees of your company added by the administrator to the *Contacts* (SP408040) form of the Self-Service Portal. *Customer accounts* are business accounts of your customers whose employees (contacts) can be set up to access the Self-Service Portal.

To enter or edit the information on this form, you must be signed in to the Self-Service Portal with a user account that has the *Administrator* role assigned to it.

Form Toolbar

The form toolbar includes standard and form-specific buttons.

For the list of standard buttons, see *Form Toolbar Overview*. The form-specific button is listed below.

Button	Description
Create Contact	Opens the **Create Contact** dialog box, where you can create a contact associated with your customer account and specify the settings of this contact.

Create Contact Dialog Box

In this dialog box, you can create a contact associated with your customer's account and specify the main contact information for this person. This dialog box opens when you click the **Create Contact** button on the form table toolbar of the current form.

Table: Create Contact Dialog Box: Main Tab

On this tab of the dialog box, you specify the details of the contact you are creating and associating with the customer.

Element	Description
First Name	The first name of the new contact.
Last Name	The last name of the new contact. You must specify a value in this box to create a contact.
Account Name	The legal business name of the customer's company, as registered with the appropriate tax agency.
Job Title	The contact's job title or position.

Element	Description
Type and Phone Number	The type and the phone number for the contact; you select the type (which is filled in by default) and then enter the phone number. You select one of the following options as the type of the phone number: *Business 1*, *Business 2*, *Business 3*, *Cell*, *Assistant*, *Fax*, *Home*, or *Home Fax*. There are two elements to enter phone number types and phone numbers for the contact.
Email	The email address of the contact.
Contact Class	The contact class that the contact belongs to. A contact class defines which additional elements appear on the **Attribute** tab of this form, so that you can enter information pertinent to the contact.

Table: Create Contact Dialog Box: Attributes Tab

On this tab of the dialog box, you specify any required attributes of the contact you are creating and associating with the customer.

Attributes are elements that hold additional information about the customer contact.

The table contains the required attributes that have been defined on the **Attributes** tab of the Contact Classes (CR205000) form in Acumatica ERP for the contact class selected in the dialog box. You need to select the attributes' values for the contact you are creating.

Column	Description
Name	The attribute available for this customer contact.
Value	The value of the attribute for the new contact.

Table: Create Contact Dialog Box: User-Defined Fields Tab

If any user-defined fields are defined as required on the Contacts (CR302000) form in Acumatica ERP, the system displays these fields on this tab. In the **Value** column of each row, you need to specify the value of the field.

Column	Description
Name	The name of the user-defined field.
Value	The value of the user-defined field for the new contact.

Table: Create Contact Dialog Box: Buttons

Button	Description
Create and Review	Creates the contact whose settings you have specified. You can review and update the existing information about the contact.
Create	Creates the contact whose settings you have specified. The system closes the dialog box and returns you to the current form.

Button	Description
Cancel	Closes the dialog box and cancels the process of creating a contact associated with the customer account.

Account Summary Area

In this area, you can review the settings of the customer account and edit the account name of your company.

Element	Description
Business Account	The identifier of the customer account.
Account Name	The business name of the customer.
Type	The type of the customer account.

Details Tab

On this tab, you can view contact information for the customer account, including the main address and contact information.

Table: Main Contact Section

This section contains the main contact information for the customer account.

Element	Description
Account Name	The legal business name of your customer company to appear on the documents.
Attention	The attention line as it is used in the business letters of your customer company, which would be used to direct a letter to the intended recipient of a letter. The box may contain something like *Purchase Orders Department* or the recipient's name.
Email	The email address used for the customer account.
Web	The website address of the customer account.
Phone 1	The primary phone number associated with the customer account.
Phone 2	An additional phone number used for the customer account.
Fax	The fax number used for the customer account.

Table: CRM Section

This section contains the class that is used to create the customer account.

Element	Description
Class ID	The class the customer account belongs to. Once you select a class for a new customer, the system populates some elements with default values for the class. The customer class defines which attributes are available on the **Attributes** tab of the current form.

Table: Main Address Section

This section contains the basic address information for the customer account.

Element	Description
Address Line 1	The first line of the customer account's main address.
Address Line 2	The second line of the customer account's main address.
City	The city of your customer.
Country	The two-letter code representing the country of the customer address. You can select a code from the predefined list.
State	The two-letter code representing the state of the customer address. You can select a code from the predefined list.
Postal Code	The postal code included in the address of your customer.
View on Map	A button you can click to view this address on the map provided by the Google Maps or Azure Maps web map service. The map is opened in a new window.

Attributes Tab

On this tab, you can view and update the values of the attributes associated with the customer account.

Attributes are elements that hold additional information about the customer account. This tab contains a list of attributes, which are determined by the class selected for the customer account on the **Details** tab of the current form.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Table: Table Columns

Column	Description
Attribute	The attribute available for this customer account.
Required	A check box that indicates (if selected) that this attribute has been defined as required. That is, a value must be specified.
Value	The value of the attribute for the customer account.

Contacts Tab

On this tab, you can see all customer contacts associated with the selected customer account.

The table toolbar includes standard and table-specific buttons.

Column	Description
Active	A check box that indicates, if selected, that this is an active contact of your customer.
Contact	The name of the contact.
Job Title	The job title or position of the contact person in your customer company.
Primary	A check box that indicates (if selected) that the current contact is considered as a main.
Email	The customer contact's email address.
Phone 1	The customer contact's phone number.
City	The city of the customer contact.

Customer Accounts

Form ID: (SP408033)

On this form, acting as an employee of the company that uses the Acumatica ERP instance, you can see the customer accounts whose contacts can be set up to access the Acumatica Self-Service Portal. On this form, you can create customer contacts for business accounts of your customers (customer accounts).

Customer contacts are the employees of your company added by the administrator to the *Contacts* (SP408040) form of the Self-Service Portal. *Customer accounts* are business accounts of your customers whose employees (contacts) can be set up to access the Self-Service Portal.

To enter or edit the information on this form, you must be signed in to the Self-Service Portal with a user account that has the *Administrator* role assigned to it.

Table

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Business Account	The identifier of the customer's company. You can click the business account identifier to open the *Customer Account* (SP408032) form. On this form, you can create a customer contact, linked to the business account of the customer.
Business Account Name	The business name of the customer.
Type	The type of the business account.
Class	The identifier of the class that the business account belongs to.
Email	The email address of the customer.

Column	Description
Phone 1	The phone number of the customer.
Address Line 1	The address line of the customer.
City	The city of the customer.
Country	The two-letter code representing the country of the customer.

Customer Contact

Form ID: (SP408042)

On this form, you can create new customer contacts.

Customer contacts are employees of your company who may interact with the vendor; optionally, they can be configured to access the Acumatica Self-Service Portal.

Form Toolbar

The form toolbar includes standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*. The form-specific buttons are listed below.

Button	Description
Save and Close	Saves the contact information and closes the form.

Summary Area

In this area, you can review the contact identifier and check the status of the contact.

Element	Description
Contact ID	The unique identifier of the contact, which the system generates automatically when a new contact is saved, based on the entered name and courtesy title.
Active	A check box that indicates (if selected) that the contact is active and the user can access the system.

Details Tab

On this tab, you can view the basic information about the customer contact.

Table: Company Section

This section contains the basic settings of the business account of the new customer contact.

Element	Description
Business Account	The identifier of the business account.

Element	Description
Business Account Name	The name of the business account related to the contact.

Table: Summary Section

This section contains summary settings of the contact.

Element	Description
First Name	The contact's courtesy title (which is *Dr.*, *Miss*, *Mr.*, *Mrs.*, *Ms.*, or *Prof.*) and first name.
Last Name	The last name of the contact.
Job Title	The job title or position of the contact in your company.
Class ID	The business account class that the contact belongs to. Once you select a class, the system populates some elements with default values for the class. The class defines which attributes and their values are listed on the **Attributes** tab of the current form.

Table: Contact Section

This section contains the settings used to communicate with the contact.

Element	Description
Email	The email address of the contact.
Web	The website of the contact.
Phone 1	The primary phone number of the contact.
Phone 2	An additional phone number of the contact.
Fax	The fax number of the contact.

Table: Address Section

This section contains the address settings of the contact.

Element	Description
Same as in Account	A check box that you select to populate the contact's address with the address of the business account.
Address Line 1	The first line of the contact's address.
Address Line 2	The second line of the contact's address.
City	The city of the contact's address.
Country	The two-letter code representing the country of the contact’s address. You can select a code from the predefined list.

Element	Description
State	The two-letter code representing the country of the contact's address. You can select a code from the predefined list.
Postal Code	The postal code included in the contact's address.
View on Map	A button you can click to view this address on the map provided by the Google Maps or Azure Maps web map service. The map is opened in a new window.

Attributes Tab

The tab contains the list of attributes for the contact, which are determined by the class selected for the customer contact on the **Details** tab of the current form.

Attributes are elements that hold additional information about the customer contact. On the current tab, you can view, add, change, or delete attribute values to store additional information about customer contacts.

The table is populated with the required attributes (that is, those for which the **Required** check box is selected) that have been defined on the **Attributes** tab of the Contact Classes (CR205000) form in Acumatica ERP for the contact class selected on the **Main** tab of the current dialog box; you need to select their values for the contact you are creating.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Attribute	The attribute for this customer contact.
Required	A check box that indicates (if selected) that this attribute has been defined as required. That is, a value must be specified.
Value	The value of the attribute that has been specified for the customer contact.

User Info Tab

On this tab, you can create and manage the user account associated with the customer contact.

You can see this tab only when you create a new customer contact.

Table: Personal Settings Section

This section contains the time zone of the customer contact.

Element	Description
Time Zone	The contact's time zone, which will be used to display the time stamps when the contact uses the Self-Service Portal. If a time zone is specified for the user, these time stamps will be converted to the user's specified time zone. If no time zone is specified, documents will be time-stamped by using the time settings on the server.

Table: User Information Section

This section contains the settings of the user account associated with the new customer contact.

Element	Description
Status	The user account status. The following options are available: • *Not Created*: The contact is not associated with any user account. • *Active*: The user account is active. That is, it has been enabled. The user account is assigned this status when you have clicked the **Enable User** button. • *Online*: The user has been enabled and is signed in to the system. • *Disabled*: The user account has been disabled. The system assigns this status to the user account when you have clicked the **Disable User** button. • *Temporarily Locked*: The active user account is temporarily locked out.
User Type	The user type of this user, which determines the set of roles available to the user and the creation rules of the user account. In this box, you select a user type that has been created on the User Types (EP202500) form of Acumatica ERP.
Login	The username for signing in to the Self-Service Portal.
Password	The password the new user should use when initially signing in. This box appears (and is required) during the creation of the user account. The box is available only if you clear the **Generate Password** check box.
Generate Password	A check box that you select to have the system generate the password automatically. This check box appears only during the creation of a new user account. If the check box is selected, the information to sign in will be sent to the user's email address when you save the user account.
Reset Password	A button that you can click to open the **Reset Password** dialog box. You can reset the password for the selected user and enter a new one. The button becomes available after the new customer contact has been created.
Enable User	A button that you click to enable the selected user account.
Disable User	A button that you click to disable the selected user account.
Unlock User	A button that you click to unlock the user account if the system temporarily locked it. ⚠ For example, the system locks the user account if the user has entered the password incorrectly three times in a row.

Table: Table

In this table, you assign roles to the user. The list of available roles is determined by the selected user type.

⚠ A user must have at least one role assigned to gain access to the system.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Element	Description
Selected	A check box that you select to assign the role to the selected user.
Role Name	The name of the user role.
Role Description	The description of the user role.

Table: Reset Password Dialog Box

You can use this dialog box, which is opened when you click the **Reset Password** button, to reset the password for the selected user.

Element	Description
The dialog box contains the following elements.	
New Password	The new password for the selected user.
Confirm Password	The new password for the selected user, which you retype to confirm it to the system.
The dialog box has the following buttons.	
OK	Replaces the password with the new one and closes the dialog box.
Cancel	Closes the dialog box without saving any entered settings or resetting the password.

Customer Contacts

Form ID: (SP408043)

On this form, you can see the contacts of your customer account that can access the Acumatica Self-Service Portal and open their accounts for editing.

Table

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Contact	The name of the contact, which is a combination of the names and the courtesy title. Click the contact name to open the *Customer Contact* (SP408042) form to review and edit the contact information.
Job Title	The job title or position of the contact in your company.
Active	A check box that indicates (if selected) that the contact is active.
Account ID	The identifier of the customer account the contact belongs to.
Account Name	The customer company the user belongs to.

Column	Description
Email	The email address of the contact.
Phone 1	The phone number of the contact.
City	The city of the contact.
Country	The two-letter code representing the country of the contact.

Identity Provider Preferences

Form ID: (SM201065)

By using this form, you can configure and enable single sign-on (SSO) with the supported external identity providers for the users of the Self-Service Portal.

To see this form, you must be signed in to the Acumatica Self-Service Portal instance with a user account that has the *Administrator* role assigned to it.

For more information, see *Integrating Acumatica ERP with OpenID Identity Providers*.

Form Toolbar

The form toolbar includes only standard buttons. For descriptions of standard buttons, see *Form Toolbar Overview*.

Table

In this table, you can see the supported identity providers. You can set up SSO with any number of identity providers, and then enable or disable SSO with them.

Table: Table Columns

Column	Description
Provider Name	The external identity provider. Acumatica ERP supports the following external identity providers: • Google • Microsoft Account
Active	A check box that indicates (if selected) that a user can sign in with the external identity provider credentials. Clear the check box to disable single sign-on with the selected external identity provider.
Realm	The full URL of the Acumatica ERP instance—for example, *https://www.example.com/my_instance*.
Application ID	The client ID provided when you registered your application instance with the external identity provider.

Column	Description
Application Secret	The client secret provided when you registered your application instance with the external identity provider.

My Cart

Form ID: (SP700001)

On this form, you can review and modify the contents of your order and proceed to checkout.

In the Acumatica Self-Service Portal, you can open this form by clicking the **Open Cart** button on the form toolbar of the *Catalog* (SP700000) form.

The amount of the order does not include taxes or any applicable shipping charges.

Form Toolbar

The form toolbar includes only form-specific buttons, as listed below.

Button	Description
Proceed to Checkout	Goes to the *Checkout* (SP700002) form, where you proceed with submitting your order.
Continue Shopping	Goes to the *Catalog* (SP700000) form, where you can add items to the cart or remove them.
Clear Cart	Clears your cart.

Summary Area

In this area, you can see the cart totals.

Element	Description
Number of Items	The quantity of units of items added to your cart.
Subtotal	The calculated amount of the items in the cart, excluding the taxes and the shipping charges. The subtotal of the order does not include taxes or any applicable shipping charges.
Currency	The currency used for the cart totals.

Table

In this table, you can review the items to be ordered, remove superfluous items, and change quantity of the items to be ordered. The table toolbar includes table-specific buttons.

> Some of the columns of this table may not be available to you.

Table: Table Buttons

The table toolbar includes only table-specific button.

Button	Description
Delete	Deletes the items from the cart.

Table: Table Columns

Column	Description
Inventory ID	The identifier of the stock or non-stock item available for purchase. You can click the identifier of the item to open the **Item Details** dialog box and view the detailed description of the item.
Description	A description of the item.
Qty.	The quantity of units of the item in the cart, measured in the unit of measure specified in the **Unit** column. To correct the quantity of units of the item in the order, double-click the quantity, enter the required quantity, and press Enter.
Price	The price of a single unit of the item.
Unit	The unit of measure (UOM) used for the item. If multiple units are available, you can view the available UOMs and select the needed one.
Discount Pct, %	The percent of the discount based on the line amount or quantity.
Discount Amt.	The discount amount based on the line amount or quantity.
Total	The amount calculated for the item, which is the unit price multiplied by the quantity.
This Warehouse	The quantity of the item available in the default warehouse.
Available Quantity	The quantity of the item available in all warehouses. This column is available if the *Multiple Warehouses* feature is disabled on the Enable/Disable (CS100000) form in Acumatica ERP.

Column	Description
All Warehouses	The quantity of the item available in all warehouses. ⚠ This column is available if the *Multiple Warehouses* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.
Warehouse	The default warehouse from which the specified item should be delivered. The default warehouse for your company is inserted in this column if both of the following conditions are met on the *Portal Preferences* (SP800000) form (the **B2B Ordering Settings** tab): • The **Include in Warehouse List** check box is selected for the warehouse in the table. • The warehouse is selected as the default one in the **Default Stock Item Warehouse** or **Default Non-Stock Item Warehouse** box (the **General Settings** section). ⚠ These boxes appear on the *Portal Preferences*form if the *Multiple Warehouses* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP. You can select another warehouse in the column from the list of available warehouses. ⚠ This column appears on the form if the *Multiple Warehouses* or *Multiple Warehouse Locations* feature is enabled (or both features are enabled) on the Enable/Disable (CS100000) form in Acumatica ERP.

Table: Item Details Dialog Box

This dialog box has more information about the selected item, which may include images. You can use the dialog box to add the required quantity of the item to the cart. You open this dialog box by clicking the identifier of the item in the **Inventory ID** column of the current form.

Element	Description
The dialog box contains the following areas and elements.	
Image area	An area where you can view any images associated with the item. You can click the arrows to the right and to the left of the image to view additional images. The images for the item are specified in Acumatica ERP in the Image area of the Stock Items (IN202500) or Non-Stock Items (IN202000) form (**Attributes** tab).
Description area	The detailed description of the item. The description of the item is specified in Acumatica ERP on the **Description** tab of the Stock Items (IN202500) or Non-Stock Items (IN202500) form.
The dialog box also has the **Attributes** table, where you can view any attributes that apply to the item and their values. The attributes listed in the table are those specified for the item class, and their values have been specified for the item on the **Attributes** tab of the Stock Items (IN202500) or Non-Stock Items (IN202000) form in Acumatica ERP. This table has the following columns.	

Element	Description
Attribute	The attribute available for this item.
Value	The value of the attribute that has been specified for the item.
The dialog box also has elements you can use to add the item to your cart. You specify the quantity of the item (and the unit of measure, if the item can be purchased in different units); you then click the **Add to Cart** button.	
Qty.	The quantity of this item that you want to add to your cart.
Unit	The unit of measure of the item you are adding to your cart.
Add to Cart	A button that you click to add the item to your cart in the specified quantity and unit of measure.

My Contracts

Form ID: (SP404000)

On this form, you can see the contracts associated with your company's customer account.

Some of the company's contracts may not be listed on the form because you do not have sufficient access rights to view them.

Selection Area

In this area of the Acumatica Self-Service Portal, you can specify the status of the contracts to be listed in the table.

Element	Description
Status	The status of the contract to be listed in the table. You can select one of the following options: • *All* (default): The table will show all customer contracts created in the system. • *Draft*: The table will show contracts that have not been activated and cannot be used yet. • *Pending Approval*: The table will show contracts that are in the approval process. • *Pending Activation*: The table will show contracts that are set up and need to be activated. • *Active*: The table will show contracts that have been activated; your company will be billed based on these contracts. • *Expired*: The table will show contracts that have expired. • *Pending Upgrade*: The table will show contracts that are being prepared for upgrade.

Table

This table contains the list of contracts.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Table: Table Columns

Column	Description
Contract ID	The identifier of the contract. You can click this identifier to open the *Contract* (SP301000) form and view the settings of the contract.
Status	The status of the contract, which is one of the following: • *Draft*: The contract has not been activated and cannot be used yet. • *Pending Approval*: The contract is in the approval process. • *Pending Activation*: The contract has been set up and needs to be activated. • *Active*: The contract has been activated; your company will be billed based on it. • *Expired*: The contract has expired. A renewable contract with this status can be renewed within the grace period (the period of time after the expiration date). • *Pending Upgrade*: The contract is being prepared for upgrade.
Description	The short description of the contract.
Customer Name	The customer with which the contract was signed.
Account	The specific business account that is to be billed for contract services.
Setup Date	The contract setup date.
Expiration Date	The date when the contract is scheduled to expire.

My Documents

Form ID: (SP402000)

On this form of the Acumatica Self-Service Portal, you can check your company's current balance and prepayment balance and track all the documents associated with your company.

All amounts are displayed in your company’s base currency as defined in its record on the Customers (AR303000) form of Acumatica ERP.

Form Toolbar

The form toolbar includes standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*. The form-specific buttons are listed below.

Command	Description
Aging Report MC	Opens the AR Aging MC (AR631100) report. This report shows your company's released AR documents whose document dates are earlier than or the same as the aging date. You can print the report or export it to a PDF or to Microsoft Excel. The documents in the report are grouped by statement cycle and broken down by aging periods or financial periods, depending on the settings of the statement cycle specified for your company on the **Financial** tab of the Customers (AR303000) form in Acumatica ERP. The amounts are shown in the currency of the document and in the base currency for your company. The balance of the AR documents is calculated as the difference between the original amount of the documents and the application amounts of the documents that were applied no later than the specified aging date.
Aging Report	Opens the AR Aging (AR631000) report. This report displays your company's outstanding balance broken down by days past due. You can print the report or export it to a PDF or to Microsoft Excel. The system uses the business date when calculating the aging categories for the documents. All the amounts are shown in your company's base currency.
Print Account History	Opens the AR Balance by Customer (AR632500) report. This report displays the outstanding balance of your company during the current financial period. You can print the report or export it to a PDF or to Microsoft Excel. The documents are grouped by account–subaccount pair and listed by reference number. You can easily see each document's dates, original amount, and balance after payment application.
Print Invoice/Memo	Opens a ready-to-print document on the Invoice/Memo (AR641000) report. The document provides the company information (in the top left), the ship-to and bill-to addresses, the pertinent shipping information, and the itemized information about the shipped items. You can print the document or export it to a PDF or to Microsoft Excel.

Summary Area

You use the elements in this area to view outstanding balances as well as available credit.

Element	Description
Outstanding Invoices and Memos	The outstanding balance of your company (the sum of its open invoices, credit and debit memos, and overdue charges).
Unapplied Payments	The balance of your company's open payments (the sum of unapplied payments and prepayments).
Net Balance	The total balance of all open documents associated with your company, including the total balance of prepayments.

Element	Description
Outstanding Invoices and Memos (Currency)	Your company's outstanding balance (the sum of open invoices, credit and debit memos, and overdue charges) in the specified currency. ⚠ This box appears on the form only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS101000) form in Acumatica ERP.
Unapplied Payments (Currency)	The balance of your company's open payments (the sum of unapplied payments and prepayments) in the specified currency. ⚠ This box appears on the form only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS101000) form in Acumatica ERP.
Net Balance (Currency)	The total balance of all open documents associated with your company, including the total balance of prepayments, in the specified currency. ⚠ This box appears on the form only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS101000) form in Acumatica ERP.
Credit Limit	The credit limit that is set for your company.
Available Credit	The credit limit that is not used regarding the current balance of your company.
Currency	The currency of the documents to be included in the list. ⚠ This box appears on the form only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS101000) form in Acumatica ERP.

All Records Tab

This tab contains the list of documents associated with your company.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Type	The document's type.
Reference Number	The document's reference number.
Date	The date when the document was created.
Due Date	The date when payment for the document is due.
Status	The status of the document.

Column	Description
Currency	The currency of the document. ⚠ This column appears on the tab only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS101000) form in Acumatica ERP.
Document Total	The original amount of the document before payment application.
Currency Document Total	The original amount of the document in the specified currency before payment application. This column appears on the tab only if the following conditions are met: • The *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS101000) form in Acumatica ERP. • The **Currency** box is cleared in the Summary area of the current form.
Open Balance	The balance of the document if a payment was applied.
Currency Open Balance	The balance of the document in the specified currency if a payment was applied. This column appears on the tab only if the following conditions are met: • The *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS101000) form in Acumatica ERP. • The **Currency** box is cleared in the Summary area of the current form.
Description	The description of the document.
Branch	The branch associated with the document.
Customer	The customer account associated with the document.

My Orders

Form ID: (SP700003)

On this form of the Acumatica Self-Service Portal, you can see your orders associated with your company's customer account, as well as the orders' statuses and totals and the delivery dates of items.

Table

The table toolbar includes standard and table-specific buttons. For the list of standard buttons, see *Table Toolbar Overview*.

The table-specific buttons are listed below. Any of these buttons can be clicked after you select an order in the table.

Button	Description
Print Order	Opens the order you have selected in the row as a print-ready document. The document displays the company information (in the top left), the ship-to and bill-to addresses, the pertinent shipping information, and the information about the quantities of the shipped items. You can print or export the document to a PDF or to Microsoft Excel.
View Shipments	Opens the **Shipments** dialog box, which displays the shipment details.
Copy Order to Cart	Opens the *My Cart* (SP700001) form and copies the items in the selected order to the cart.
Cancel Order	Cancels the selected order. This button is available if the selected order has the *Open* or *On Hold* status.

Table: Table Columns

Column	Description
Order Nbr.	The reference number of the document. Click the number to open the order in a print-ready format. The document provides the company information (in the top left), the ship-to and bill-to addresses, the pertinent shipping information, and the quantities and prices of the shipped items. You can print the document or export it to a PDF or to Microsoft Excel.
Status	The status of the document, which is assigned automatically and can be one of the following options: *Order*, *On Hold*, *Credit Hold*, *Open*, *Back Order*, *Shipping*, *Canceled*, *Invoiced*, or *Completed*.
Date	The date of the document.
Delivery Date	The expected delivery date.
Ordered Qty.	The total quantity of items in the order.
Order Total	The total amount of the document.
Currency	The currency of the document.
Location	The customer location from which the items have been ordered.
Full Name	The user who created the order.
Type	The type of the document.

Table: Shipments Dialog Box

In this dialog box, you can view the shipments generated for the selected order. You can open this dialog box by clicking an order in the table and clicking the **View Shipments** button on the table toolbar.

Button	Description
Shipment Nbr.	The unique reference number of the shipment confirmation. Click the number to open the print-ready form of the document on the *Shipment Confirmation* (SO642000) report. The document provides the company information (in the top left), the ship-to address, the pertinent shipping information, and the information about the quantities of the shipped items.
Status	The status of the document, which can be one of the following options: *On Hold*, *Open*, *Confirmed*, or *Completed*. For details on shipments' statuses, see *To Track a Shipment*.
Shipment Date	The date of the shipment.
Location	The location to receive the shipment.

My Statements

Form ID: (SP404600)

On this form of the Acumatica Self-Service Portal, you can view the statement history of your company's customer account, get new statements, and print statements.

Form Toolbar

The form toolbar includes standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*. The form-specific buttons are listed below.

Button	Description
Print Statement	Opens the statement you have selected (by clicking the row) as a print-friendly document. The document shows the vendor's and your company's contact information (in the top left), due dates and amounts, and the documents based on which the amounts included in the statement have arisen. You can print the statement or export it to a PDF or to Microsoft Excel.

Selection Area

You can use the elements in this area to specify the criteria of the statements you want to view.

Element	Description
From Date	The start date of the date range.
To Date	The end date of the date range.

Table

This table contains the list of the company's statements.

Table: Table Columns

Column	Description
Statement Date	The date of the statement.
Statement Balance	The balance as shown on the statement.
Overdue Balance	The overdue amount on a certain date, which you specified in the **To Date** box of the current form.
Branch	The branch associated with the statement.
Currency	The currency of the statement. This column appears on the form only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.
Currency Statement Balance	The balance of the statement in the specified currency. This column appears on the form only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.
Currency Overdue Balance	The overdue balance of the customer's statement in the specified currency. This column appears on the form only if the *Multicurrency Accounting* feature is enabled on the Enable/Disable (CS100000) form in Acumatica ERP.

New Case

Form ID: (SP203000)

On this form of the Acumatica Self-Service Portal, you can create a case.

Form Toolbar

The form toolbar includes standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*.

The form-specific buttons are listed below.

Button	Description
Submit	Submits the case you have entered, causing it to be saved to the system.

Summary Area

By using this area, you can enter basic information about the new case.

Element	Description
Contract	The contract associated with the case.
Priority	The priority of the case. The following options are available: *Low*, *Medium*, and *High*.
Class ID	The class the case belongs to. Once you select a case class, the system populates some elements with the default values of the class. The case class determines which attributes and their values are available on the **Attributes** tab of the current form.
Subject	A description of the new case.

Details Tab

On this tab, you can describe the new case.

The tab includes the following:

- The formatting toolbar. For more information, see *Formatting Toolbar Overview*.
- The text area, where you enter a detailed description of the case or relevant notes.

Attributes Tab

On this tab, you can select appropriate values for the attributes associated with the new case.

Attributes are elements that hold an additional information about the case. The list of available attributes and their possible values is determined by the case class you have selected in the **Class ID** box of the Summary area.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Table: Table Columns

Column	Description
Required	A check box that indicates (if selected) that this attribute is defined as required. That is, a value must be specified.
Attribute	The attribute for the new case.
Value	The value of the attribute that has been specified for the case.

New Comment

Form ID: (SP500000)

On this form of the Acumatica Self-Service Portal, you can add comments to the selected case.

Form Toolbar

The form toolbar includes standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*. The form-specific buttons are listed below.

Button	Description
Save and Close	Saves the comment and closes the form.
Close	Closes the form without saving the comment.

Text Area

Use this area to add a comment.

Element	Description
Summary	The summary of the comment.
Details	The contents of the comment.

Open Cases

Form ID: (SP204000)

On this form of the Acumatica Self-Service Portal, you can make quick inquiries about open cases. You can view the following:

- The cases you have created
- The cases a user in your company has created
- All cases created by users in your company

Form Toolbar

The form toolbar includes only standard and form-specific buttons. For the list of standard buttons, see *Form Toolbar Overview*.

Selection Area

You can use the elements in this area to specify the criteria of the cases you want to view.

Element	Description
Created By	A box and the **Me** check box, which you can use as follows: • Select the **Me** check box to view cases you have created. • Clear the **Me** check box and select another user to view cases the user has created. • Leave the box blank and clear the **Me** check box to view all cases created by all users of your company.

Element	Description
Contract	The contract associated with the cases you want to view. Leave the box blank to view cases associated with all contracts.

Table

This table lists the cases that meet the criteria specified in the Selection area of the current form.

The table toolbar includes only standard buttons. For the list of standard buttons, see *Table Toolbar Overview*.

Column	Description
Case ID	The identifier of the case, which is also a link you can click to view the settings of the case. If you click the link, the system opens the case on the *Case Details* (SP203010) form.
Subject	The description of the case that was provided when the case was reported.
Status	The status of the case, which can be one of the following options: • *New*: The case has been created in the system, but no work has been done on it yet. • *Open*: The case is being worked on by the support team.
Reason	The reason for last changing the status of the case, which can be one of the following options: • *Unassigned* (default): The new case has not been assigned to an owner. If you select this reason and an owner is specified, the system will not generate a warning or error, so be sure no owner is specified. A case with this reason has the *New* status. • *Assigned*: The case has been assigned to an owner. • *In Process*: The case is being worked on.
Contract	The contract associated with the case.
Severity	The severity level of the case, which is one of the following options: *High*, *Low*, and *Medium*.
Priority	The priority of the case. The following options are available: *High*, *Low*, and *Medium*.
Class ID	The class the case belongs to.
Assigned To	The name of the support representative who is assigned to work on the case.
Last Activity	The date of the last activity on the case.
Contact	The employee of your company who submitted the case.
Account ID	The ID of the business account associated with the case.
Account Name	The name of the business account associated with the case.

Portal Preferences

Form ID: (SP800000)

You use this form to configure your company's Acumatica Self-Service Portal instance. You select the company or branch that the portal user can access, specify the default case settings, select the email templates for automatic mailing, and configure the online ordering.

To access this form, you must be signed in to the Self-Service Portal instance with a user account that has the *Administrator*, *Customer Admin*, or *Portal Admin* role assigned to it.

Form Toolbar

The form toolbar includes only standard buttons. For the list of standard buttons, see *Form Toolbar Overview*.

General Settings Tab

On this tab, you can specify portal and CRM settings for this customer account.

Table: Portal Settings Section

This section contains the settings of the Self-Service Portal.

Element	Description
Portal ID	The ID of the Self-Service Portal to which you are currently signed in.
Portal Name	A description of the portal.
Display Financial Documents	The set of financial documents that can be displayed on the *My Documents* (SP402000), *My Statements* (SP404600), and *My Orders* (SP700003) forms. This setting also affects the visibility of documents in reports that may be opened from these forms, such as Invoice/Memo (AR641000), AR Balance by Customer (AR632500), and AR Aged Past Due (AR631000). This setting also affects the set of documents that are used to determine the **Outstanding Invoices and Memos**, **Unapplied Payments**, and **Net Balance** amounts on the *My Documents* (SP402000) form. The following options are available: • *From All Companies and Branches*: The portal user can see documents associated with any company and branch set up in the system. • *From Company*: The portal user can see documents associated with a particular company (which you select in the **Portal Site Company** box) and its branches. • *From Branch*: The portal user can see documents associated with a particular branch (which you select in the **Portal Site Branch** box).
Portal Site Company	The company whose documents a portal user may see. This box appears if the *From Company* option is selected in the **Display Financial Documents** box.

Element	Description
Portal Site Branch	The branch whose documents a portal user may see. This box appears if the *From Branch* option is selected in the **Display Financial Documents** box.
Home Page	The portal home page. The following options are available: • *Company* node (that is, the top node of the tree): The built-in Welcome to Acumatica page. This page provides links to the Acumatica external resources, such as Acumatica announcements and news, the Acumatica Community, and the Acumatica Development Platform website. • *Knowledge base*: The Welcome Knowledge Base article. • *Self-Service Portal Guide*: The Help topic.

Table: CRM Settings Section

In this section, you specify the default settings for new cases entered through the Self-Service Portal.

This section is available only if the *Case Management on Portal* feature is enabled on the Enable/Disable Features (CS100000) form in Acumatica ERP.

Element	Description
Default Case Class	The case class assigned to a new case by default.
Priority	The default case priority. The following options are available: *Low*, *Medium*, and *High*.
Case Activity Notification Template	The template that is used to send notifications to the case owner about changes customers have made to their cases.
Default Contact Class	The contact class assigned to a new contact by default.

Table: Email Preferences Section

In this section, you select the template that will be used for sending automatic emails.

Element	Description
Portal External Access Link	The URL that will be included in the emails sent to new users and the username and password recovery emails if the user account is marked as a *guest account*. This setting is also available on the *Site Preferences* (SM200505) form in Acumatica ERP.

B2B Ordering Settings Tab

On this tab, you specify the default settings for the online ordering functionality of the Self-Service Portal.

You can specify the warehouses from which the portal users can order items and the default warehouses for stock and non-stock items. You can also select the default sales order type, indicate whether the portal users will be able to view the quantities of items in stock, and upload a default image for the items in the catalog.

> This tab appears on the form if the *B2B Ordering* feature is enabled on the Enable/Disable Features (CS100000) form in Acumatica ERP.

Table: General Settings Section

Element	Description
Default Branch for New Orders	The branch to be associated by default with new sales orders created in the Acumatica Self-Service Portal. If this setting is modified while portal users are shopping, the customer cart on the *My Cart* (SP700001) form becomes cleared for all users. If the *From Branch* option is selected in the **Display Financial Documents** box of the **General Settings** tab of the current form, the branch specified in the **Portal Site Branch** box is automatically inserted in this box and cannot be changed.
Default Stock Item Warehouse	The warehouse from which stock items will be ordered by default. In this box, you select the default warehouse from the list of warehouses. This list of warehouses displays all warehouses that you selected in the **Include in Warehouse List** column of the table below. This box is available if the *Multiple Warehouses* feature is enabled on the Enable/Disable (CS100000) form of Acumatica ERP.
Default Non-Stock Item Warehouse	The warehouse from which non-stock items will be ordered by default. In this box, you select the default warehouse from the list of warehouses. This list of warehouses displays all warehouses that you selected in the **Include in Warehouse List** column of the table below. This box is available if the *Multiple Warehouses* feature is enabled on the Enable/Disable (CS100000) form of Acumatica ERP.
Sales Order Type	The type of sales order that will be generated when the customer submits an order. By default, the system uses the *SO* order type.
Show Available Quantities	A check box that you select to show the quantity of items left in stock. When you select this check box, the **Show Available Items Only** check box becomes visible in the Selection area of the *Catalog* (SP700000) form.
Allow Only Sales Unit for Purchases	A check box that you select so that the customer can order items in only the units of measure specified as the items' sales units.

Table: Default Image Settings Section

In this section, you can upload the default images to be shown when an item in the catalog does not have an image attached.

Element	Description
Browse	A button you click to open the file selection window, where you can select an image to upload.

Element	Description
Upload	A button you click to upload the selected image to the system.
Image	The small version of the uploaded image that is used as a default image. Click on the image to see the large version of it. To upload an image, drag it to the Image area. Alternatively, you can click **Browse** to select an image, and then click **Upload** to upload the selected image. After you have uploaded the images, click **Save** on the form toolbar to save the changes. If you upload multiple images, the image that is displayed when you click **Save** on the form toolbar is used by default. To browse images, click on the arrows under the image.

Table: Table

In this table, you can see the list of warehouses available in your organization.

Element	Description
Include in Warehouses List	A check box that indicates (if selected) that the warehouse is available for selection on the *Catalog* (SP700000) form.
Branch	The branch with which the warehouse is associated.
Company	The company with which the warehouse is associated.
Description	The description of the warehouse.
Warehouse ID	The identifier of the warehouse.

Search Form

Form ID: (SE000050)

Searching in the Self-Service Portal gives you the ability to quickly open a form or find a help topic with the needed information.

Search Form

You start a search by typing a word, form number, or phrase in the **Search** box, which is located in the top pane of the (see the screenshot below). The search results appear on the form specifically designed for searches. The following screenshot shows the **Search** box.

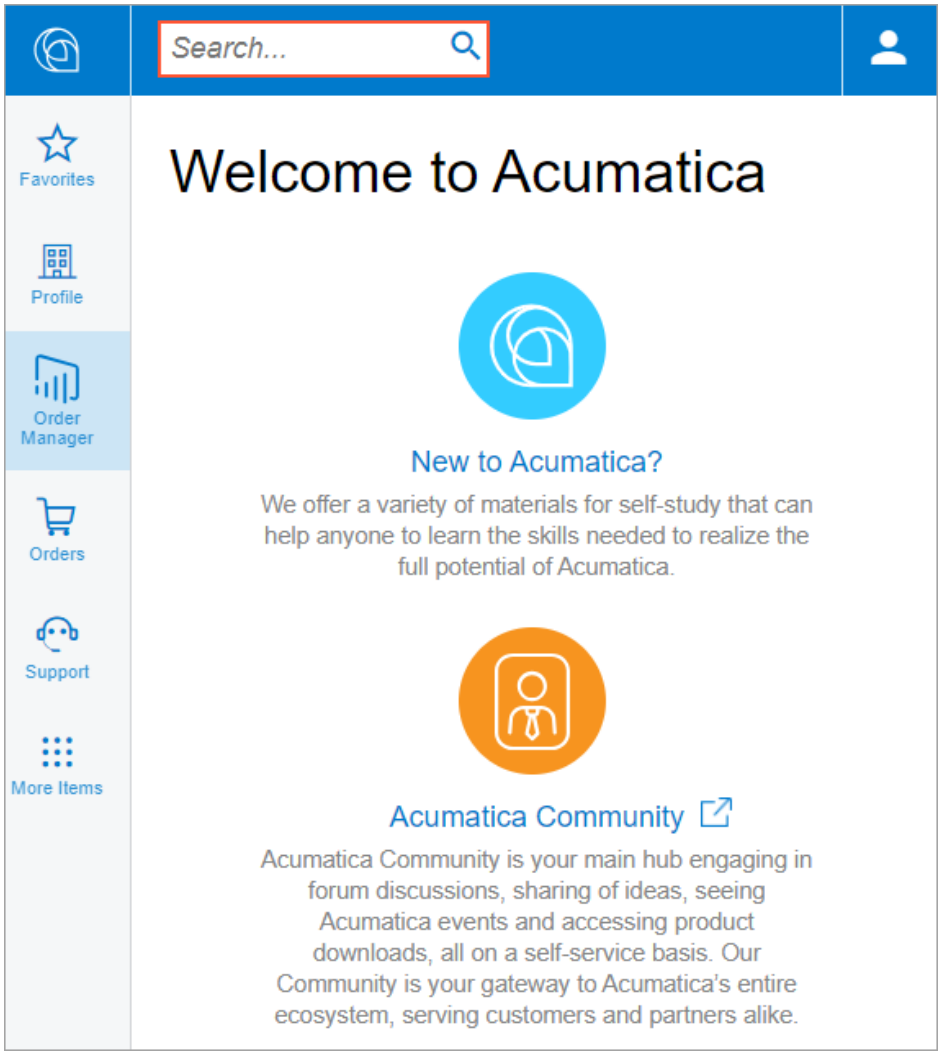


Figure: The Search box

User Profile

Form ID: (SP408045)

On this form of the Acumatica Self-Service Portal, you can enter or edit your contact and user information, including name, email address, phone number, time zone, and password.

The system inserts the information it copies from the Contacts (CR302000) form of Acumatica ERP by default. Any changes you make to your own profile are reflected on the Contacts form of Acumatica ERP when you save these changes.

You can open this form by doing either of the following:

- Clicking your username in the Info area (in the top right corner of the Self-Service Portal screen) and then clicking **My Profile** (for users with any role).
- Clicking the *User Profile* (SP408045) form in the workspace or using the search

Form Toolbar

The form toolbar includes only standard buttons. For the list of standard buttons, see *Form Toolbar Overview*.

Details Tab

On this tab, you can enter or edit your basic contact information.

Table: Summary Section

This section contains information about your name and job title.

Element	Description
First Name	Your courtesy title (which is one of the following options: *Dr.*, *Miss*, *Mr.*, *Mrs.*, *Ms.*, or *Prof.*) and first name.
Last Name	Your last name.
Job Title	Your job title or position in your company.

Table: Contact Section

This section contains your contact information.

Element	Description
Email	Your email address.
Web	Your company's website.
Phone 1	Your primary phone number.
Phone 2	Your additional phone number.
Phone 3	Another phone number where you can be reached.
Fax	Your fax number.

Table: Address Section

This section contains your business address settings.

Element	Description
Same as in Account	A check box that you select to have the system populate your address with the address of the business account. If this check box is selected, the system populates the boxes in the current section with the address settings that are specified in the **Main Address** section of the *Company Profile* (SP408030) form.
Address Line 1	The first address line of your address.
Address Line 2	The second address line of your address.

Element	Description
City	The city of your address.
Country	The two-letter code representing the country of your address. You can select a code from the predefined list.
State	The two-letter code representing the state of your address. You can select a code from the predefined list.
Postal Code	The postal code included in your postal address of the user.
View on Map	A button you can click to view this address on the map provided by the Google Maps or Azure Maps web map service. The map is opened in a new window.

User Info Tab

On this tab, you can view your user information and your status. You can also use this tab to manage your time zone and password.

Table: Personal Settings Section

This section contains the time zone of your user account.

Element	Description
Time Zone	The contact's time zone, which will be used to display the time stamps. If a time zone is specified for the user, these time stamps will be converted to the user's specified time zone. If no time zone is specified, documents will be time-stamped by using the time settings on the server.

Table: User Information Section

This section contains the settings of your user account.

Element	Description
Status	The account status. The following options are available: • *Pending Activation*: The new user account is awaiting activation. • *Active*: The user account is active. • *Online*: The user account is active and the user is signed in to the system. • *Disabled*: The user account is disabled. • *Temporarily Locked*: The user account is temporarily locked out.
User Type	The user type of your user account, which determines the roles available to your user account and the creation rules of the user account.
Login	Your username in the Self-Service Portal.
Password	The masked password to be used to sign in to your account.

Element	Description
Generate Password	A check box that you select to have the system generate the password automatically. If you clear this check box, you must enter a password for the new user in the **Password** box. The information to sign in will be sent to your email address when you save the user account.
Reset Password	A button that you can click to open the **Reset Password** dialog box, in which you can reset your password and enter a new one.

Table: Reset Password Dialog Box

You can use this dialog box to reset your password and enter a new one.

The dialog box opens when you click the **Reset Password** button.

Element	Description
The dialog box contains the following elements.	
New Password	The new password, which must meet the security requirements set for passwords in your company.
Confirm Password	The new password again; enter the same new password you typed above.
The dialog box contains the following buttons.	
OK	Replaces your password with the new one and closes the dialog box.
Cancel	Closes the dialog box without saving any entered settings or resetting your password.

Form Quick Reference

By using this chapter, you can quickly find procedural and conceptual articles related to a particular form of the Self-Service Portal.

Case Details (SP203010)

General Information

Case Management

Form Reference

Self-Service Portal Overview

Case Details (SP203010)

Help Dashboard

Catalog (SP700000)

Procedures

To View an Item's Details

To Browse the Catalog and Select a Warehouse

To Search for Specific Items

To Add Items to the Shopping Cart

Concepts

Browsing the Catalog

Form Reference

Catalog (SP700000)

Help Dashboard

Checkout (SP700002)

Procedures

To Place an Order

Concepts

Self-Service Portal Overview

Placing Orders

Form Reference

Checkout (SP700002)

Help Dashboard

Closed Cases (SP204010)

Activities

To Close a Case

General Information

Self-Service Portal Overview

Case Management

Form Reference

Closed Cases (SP204010)

Help Dashboard

Company Profile (SP408030)

Procedures

To Edit Your Company's Account Information

Concepts

Self-Service Portal Overview

Managing Your Company Account

Your Company's Information

Form Reference

Company Profile (SP408030)

Help Dashboard

Contact (SP408041)

Procedures

To Create a Contact

Concepts

Self-Service Portal Overview

Managing Your Company Account

Your Company's Contacts

Form Reference

Contact (SP408041)

Help Dashboard

Contacts (SP408040)

Procedures

To Create a Contact

Concepts

Self-Service Portal Overview

Managing Your Company Account

Your Company's Contacts

Form Reference

Contacts (SP408040)

Help Dashboard

Contract (SP301000)

Procedures

To View Contract Details

Concepts

Self-Service Portal Overview

Reviewing Contract Settings

Viewing of Contracts

Form Reference

Contract (SP301000)

Help Dashboard

Customer Account (SP408032)

Concepts

Self-Service Portal Overview

Managing Customer Accounts

Managing Customer Accounts

Form Reference

Customer Account (SP408032)

Help Dashboard

Customer Accounts (SP408033)

Concepts

Self-Service Portal Overview

Managing Customer Accounts

Managing Customer Accounts

Form Reference

Customer Accounts (SP408033)

Help Dashboard

Customer Contact (SP408042)

Procedures

To Create a Customer Contact

Concepts

Self-Service Portal Overview

Managing Customer Accounts

Managing Customer Accounts

Form Reference

Customer Contact (SP408042)

Help Dashboard

Customer Contacts (SP408043)

Concepts

Self-Service Portal Overview

Managing Customer Accounts

Managing Customer Accounts

Form Reference

Customer Contacts (SP408043)

Help Dashboard

Identity Provider Preferences (SM201065)

Concepts

Self-Service Portal Overview

Managing Your User Profile

Managing Your Company Account

Form Reference

Identity Provider Preferences (SM201065)

Help Dashboard

My Cart (SP700001)

Procedures

To Change the Contents of the Cart

To Clear Your Cart

To Place an Order

Concepts

Self-Service Portal Overview

Managing Online Orders

Using the Shopping Cart

Form Reference

My Cart (SP700001)

Help Dashboard

My Contracts (SP404000)

Procedures

To View Contract Details

Concepts

Self-Service Portal Overview

Reviewing Contract Settings

Viewing of Contracts

Form Reference

My Contracts (SP404000)

Help Dashboard

My Documents (SP402000)

Procedures

To Print an Invoice or Credit Memo

Concepts

Self-Service Portal Overview

Managing Your Company Account

Your Company's Financial Documents

Form Reference

My Documents (SP402000)

Help Dashboard

My Orders (SP700003)

Procedures

To Track an Order

To Cancel an Order

To Track a Shipment

Concepts

Self-Service Portal Overview

Managing Online Orders

Tracking Orders

Form Reference

My Orders (SP700003)

Help Dashboard

My Statements (SP404600)

Concepts

Self-Service Portal Overview

Your Company's Financial Documents

Form Reference

My Statements (SP404600)

Help Dashboard

New Case (SP203000)

Activities

To Create a Case

General Information

Self-Service Portal Overview

Case Management

Form Reference

New Case (SP203000)

Help Dashboard

New Comment (SP500000)

Activities

To View and Edit Case Details

General Information

Self-Service Portal Overview

Case Management

Form Reference

New Comment (SP500000)

Help Dashboard

Open Cases (SP204000)

Activities

To View and Edit Case Details

To Close a Case

General Information

Self-Service Portal Overview

Case Management

Form Reference

Open Cases (SP204000)

Help Dashboard

Portal Preferences (SP800000)

Concepts

Self-Service Portal Overview

Managing Your User Profile

Managing Your Company Account

Form Reference

Portal Preferences (SP800000)

Help Dashboard

Search Form (SE000050)

Concepts

Portal Interface Guide

Search

Form Reference

Search Form (SE000050)

Help Dashboard

User Profile (SP408045)

Procedures

To Change Your Password

Concepts

Self-Service Portal Overview

Managing Your User Profile

Your User Profile

Form Reference

User Profile (SP408045)

Help Dashboard

Portal Interface Guide

This guide provides an overview of the Self-Service Portal website user interface and navigation options. Although Self-Service Portal webpages have an intuitive point-and-click interface, you might require more information about some elements of the interface. Knowledge of the Self-Service Portal interface and navigation basics will help you perform various tasks more efficiently.

Signing In and Signing Out

This article describes how to start and finish using the Self-Service Portal.

Signing In

To start using the Self-Service Portal, you need to sign in. To do so, perform these steps:

1. Open your browser.
2. In the Address bar, type the URL of the Self-Service Portal instance and press Enter. This opens the Sign-In page.
3. In the **Username** and **Password** boxes, type your username and password, respectively.
4. Optional: In the **Interface Language** box, select the interface language you want to use.
5. Click **Sign In**.

Forgotten Password or Username

If you have forgotten your password, follow these instructions to recover it:

1. On the Sign-In page, click **Forgot your password or username?**.
2. On the **Password recovery** screen, type your username in the **Enter your username** box.
3. Click **Submit**.
4. Check your email for further instructions.
5. In the email, click the password recovery link.

   This opens the Sign-In page for changing your password.
6. In the **New Password** and **Confirm Password** boxes, type your new password.
7. Click **Sign In**.

If you have forgotten your username, follow these steps to recover it:

1. On the Sign-In page, click **Forgot your password or username?**.
2. On the **Password recovery** screen, click **Forgot your username?**.
3. On the **User recovery** screen, type your email address in the **Enter your email address** box.
4. Click **Submit**.
5. Check your email for an email that contains your username.

Signing Out

When you have finished using the Self-Service Portal, remember to sign out to prevent unauthorized users from tampering with the system or your account.

> ⚠ If you are inactive for more than one hour, you will be automatically signed out.

To sign out of the system, do the following:

- In the info area (in the upper-right corner of the screen), click your username and click **Sign Out**.

Self-Service Portal User Interface

In the user interface of the Self-Service Portal, elements provide you with enhanced visualization and flexibility in configuring the navigation items. The user interface makes your work in the system convenient and easy because you can configure it to better fit your working tasks.

This chapter describes the elements of the user interface.

Basic Elements of the User Interface

Every Self-Service Portal screen includes basic elements that users use for navigating the system, viewing and managing data, and performing other basic functions. The following screenshot shows a typical Self-Service Portal screen with the basic elements that appear on it.

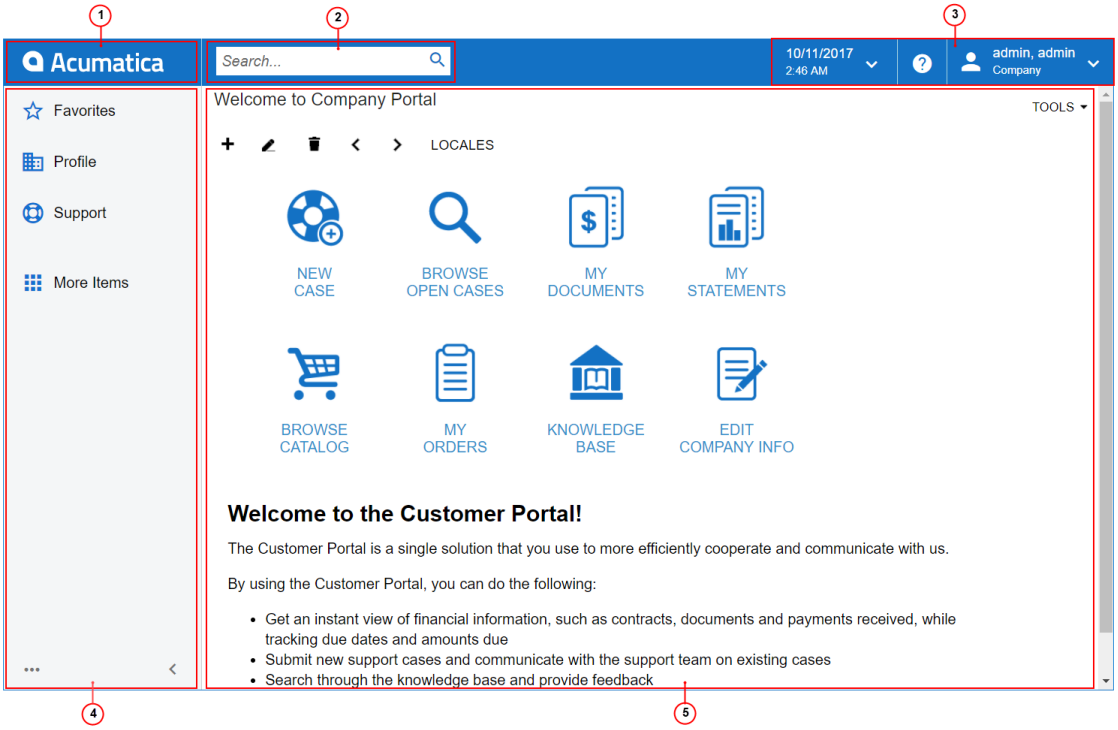


Figure: Basic elements of the user interface

1. Home button
2. Search box
3. Info area
4. Main menu (displayed as a panel)
5. Working area

Home Button

When you click the Home button, which has the Acumatica logo on it by default and is located in the top left corner of the Self-Service Portal screen, you are forwarded to the home page of your instance.

If the main menu is minimized the Home button is displayed to the left of the Info area.

Search Box

By using the **Search** box on the top pane of the Self-Service Portal screen, you can search for a text string in menu items, form titles, help topics, files, notes, and *entities* created using system forms, such as vendors and cases. Additionally, you can search for a form by its title and ID. For details, see *Search*.

Info Area

The info area, in the upper-right corner of the Self-Service Portal screen, contains the menus and buttons that you can use to sign out from the system, change the settings of your account, and view the business date. For more information, see *Info Area*.

Main Menu

The main menu in the Self-Service Portal contains the links to your favorites and workspaces (menus with links to forms). By default, the main menu is a panel located on the left side of the Self-Service Portal screen. You can minimize the menu so that it is displayed as a button in the top left corner of the screen (instead of the Home button). For details, see *Main Menu*.

When you click a workspace item on the main menu, the workspace menu opens. This menu contains the forms dedicated to a particular functional area. For details, see *Workspaces*.

Working Area

The working area, which is the large area on the right side of the screen, may display any of the following:

- Form: The Self-Service Portal has forms of multiple types. For more information, see *Form Overview*.
- The Welcome dashboard: On this dashboard, usually, you can see introductory information about capabilities of the portal. The dashboard is configured by the organization which hosts Self-Service Portal.

Info Area

The info area, in the right corner of the top pane on the Self-Service Portal screen in the user interface, includes a group of menus and buttons, as shown in the screenshot below. These menus and buttons communicate the status of your user account in the system and provide access to certain settings.

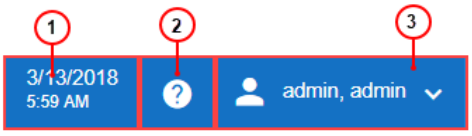


Figure: Info area

1. Business date and time
2. Help button
3. User menu button

You can find more details about these items in the following sections.

Business Date and Time

Business date is used as the default date on Self-Service Portal forms and on documents that you create by using the forms. Business date and time, which you can see in the Info area, is specified in an Acumatica ERP instance to which Self-Service Portal is connected. You cannot change the business date and time on Self-Service Portal.

Help Button

By clicking the Help button, you can open the Help menu, which overlaps the working area. The content of this menu depends on the item displayed in the working area when you click this button. For a detailed description of Help capabilities in Self-Service Portal, see *Help*.

User Menu

The User menu button displays your first and last name (last name first, with the names separated by a comma) and the name of the company to which you signed in if multiple companies are configured in your Self-Service Portal instance. The following screenshot shows the items of the User menu.

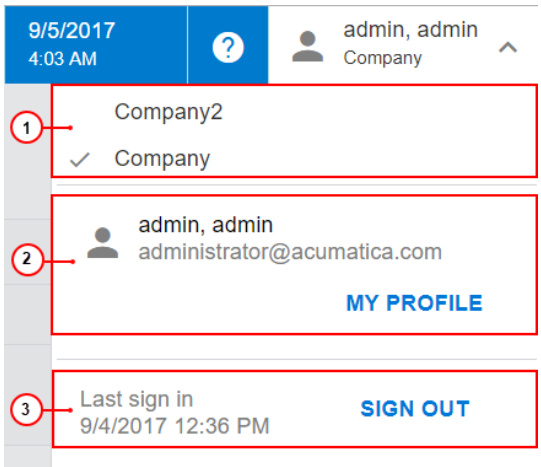


Figure: Items of the User menu

The User menu includes the following sections:

1. Companies
2. My Profile

3. Sign-In

The Companies section of the User menu contains the list of companies to which you can sign in if multiple companies are configured in your Self-Service Portal instance. The company you are currently signed in to is indicated with a check mark. You can switch to a different company by clicking the company name.

The My Profile section contains your username, your email address, and the **My Profile** button, which you click to open the *User Profile* (SP408045) form. For more information about the settings of your profile, see *Managing Your User Profile*.

The Sign-In section contains the date and time of your last sign-in to the system and the **Sign Out** button, which you click to sign out of the system.

Search

By searching in the Self-Service Portal, you can quickly open a form (or a record on a form), find a file, or find a help topic. This topic contains information on performing searches in the Self-Service Portal.

Search Form

To begin a search, you type a text string in the **Search** box. The system opens the Search form in the working area, on top of the page (such as a dashboard or a form) that was opened when you started your search. The form is shown in the following screenshot.

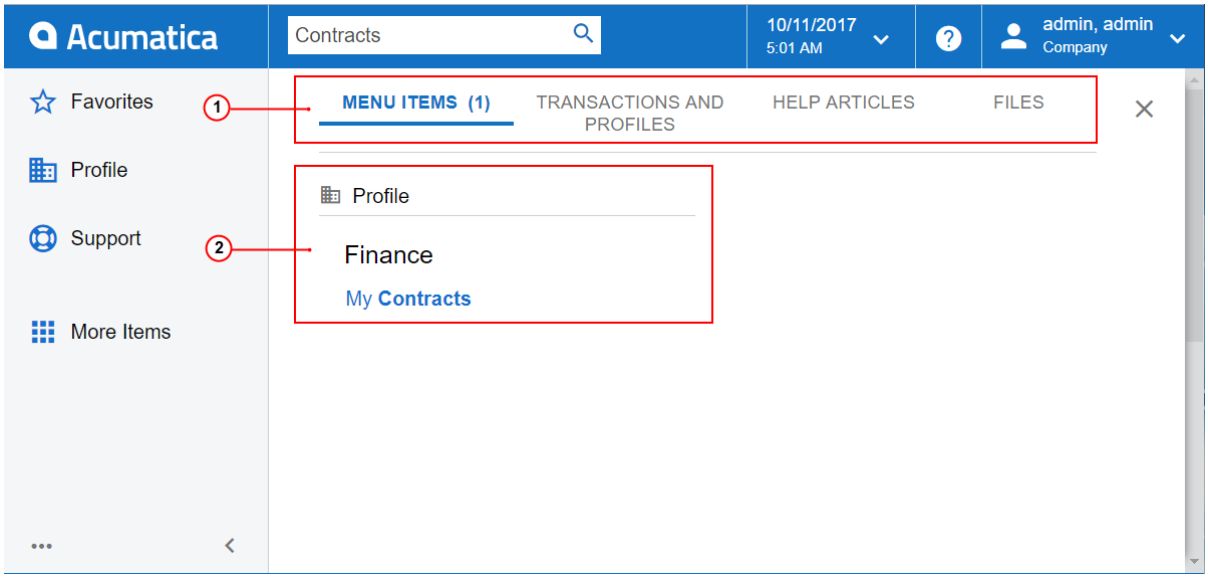


Figure: Search form

1. Search filter tabs
2. Search results

You can look through the search results on the Search form and go back to the page you had opened before you performed the search. For example, you can start to enter data on some Self-Service Portal form, search for some information, and then go back to the form and continue to enter data because your previous changes have been preserved.

Search Filter Tabs

By default, the search in the Self-Service Portal is performed in form titles. You can switch to one of the search filter tabs to change the scope of the search. The following tabs are available:

- **Menu Items**: On this tab, you can scan for specific forms by name or ID.
- **Transactions and Profiles**: On this tab, you can look for specific system records, such as customers, vendors, prospects, employee accounts, and notes attached to records.
- **Help and Support**: This tab lists search results in all guides and help topics. When you click a link to a Help topic, the topic is opened in a separate tab of a browser. If you want to open the Help topic over the working area, you should press Ctrl and click the link.
- **Files**: On this tab, you can view files attached to system records.

When you type a text string in the **Search** box and switch between the search filter tabs, your text string is preserved, and search results are automatically displayed for this text string.

Search Results

In Self-Service Portal, an intelligent search is implemented. The system performs a flexible search, considering all possible forms of the text string that you have entered in the **Search** box, and then lists the search results from the most relevant to the least relevant.

The system narrows the search results based on the access rights of the user who performs the search. If you don't have permissive access rights to particular data (such as contracts), these objects do not appear in the search results, even though they match the search criteria. Your access rights to file attachments are determined by your rights to the entities to which the files are attached.

Search results displayed on the **Transactions and Profiles** tab prioritizes records of the following entity types:

Entity	Data access class
Business account	`PX.Objects.CR.BAccount`
Customer	`PX.Objects.AR.Customer`
Payroll employee	`PX.Objects.PR.PREmployee`
Contact	`PX.Objects.CR.Contact`
Vendor	`PX.Objects.AP.Vendor`
Employee	`PX.Objects.EP.EPEmployee`
Lead	`PX.Objects.CR.CRLead`
Inventory item (stock or non-stock)	`PX.Objects.IN.InventoryItem`

Search Tips

Keep the following tips in mind when you use the search capabilities in the Self-Service Portal:

- To search for all possible forms of a particular word or phrase, you type it as is without any additional characters. For example, if you type *invoice* in the **Search** box, the system displays all strings that contain *invoice*, *invoices*, and *invoiced*.

- To search for an exact match of a particular word or phrase, you enclose it in quotation marks. For example, if you type *"Western Star Trucks"* in the **Search** box, the system returns only the customer with this exact name.
- To search for a particular string everywhere in the system (in form titles, help topics, system entities, and files), you type the string in the **Search** box and then switch to each of the filtering tabs.

Main Menu

The main menu in the user interface of the Self-Service Portal, shown in the following screenshot, includes the **Favorites** menu item, the workspace menu items, the **More Items** menu item, the configuration menu, and the Collapse or Expand button.

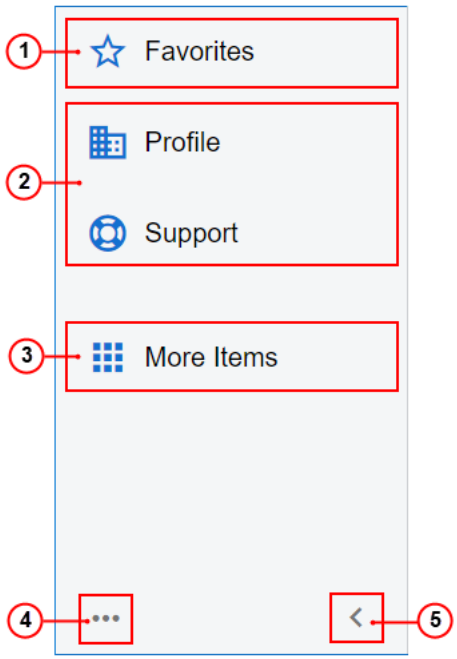


Figure: Main menu

1. **Favorites** menu item
2. Workspace menu items
3. **More Items** menu item
4. Configuration menu
5. Collapse or Expand button

You click the **Favorites** menu item to view your favorite forms. This menu item appears in the main menu if you have at least one form added to your favorites. You click this item to open the list of your favorites.

You click each of the workspace menu items to view the forms of that workspace, which is a particular functional area. By default, the most commonly used workspaces are represented with menu items on the main menu; you can add workspace menu items to the main menu or remove existing menu items. For details on workspaces, see *Workspaces*.

When you click the **More Items** menu item, a menu is opened with tiles, grouped by broader functional areas, that represent all of the possible workspaces. You can pin any of these workspaces to the main menu by pointing to the workspace tile and clicking the Pin ( ) button.

The configuration menu contains commands that you click to configure the location of the main menu and to edit the menu items in the whole system (if you are signed in to an account with the *Administrator* role assigned). The menu commands are listed in the following table.

Table: Menu Commands of the Configuration Menu

Command	Description
Collapse to Top	Collapses the main menu panel and adds the **Menu** button in the top left corner of the screen (the Home button with the Acumatica logo is moved to the left of the Info area). When the main menu is collapsed, the work area expands to cover the area where the main menu had been. This menu command is displayed only when the main menu panel is shown on the left side of the screen.
Expand to Left	Displays the expanded main menu panel on the left side of the screen. This menu command is displayed only when the main menu is collapsed and the **Menu** button is shown in the top left corner of the screen.
Edit Menu	Switches the system to Menu Editing mode. In this mode, authorized users can customize menu items for the whole system. This menu command is displayed only for users with the *Administrator* role assigned. For details, see *Menu Editing Mode*.

By clicking the Collapse button, you can collapse the main menu panel so that it displays only icons, and by clicking the Expand button, you can expand the panel to the full width. By clicking these buttons, you can change the width of the main menu pane when the menu is in both locations—expanded on the left and collapsed to the top.

Workspaces

In the Self-Service Portal, a workspace is a menu that contains links to the forms of a particular functional area of the product. In the following screenshot, the basic elements of a workspace are shown.

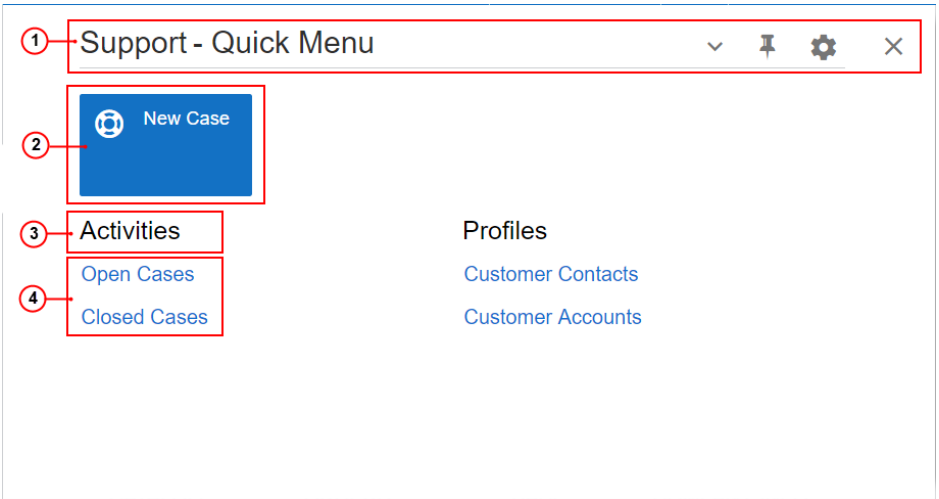


Figure: Workspace elements

1. Workspace title bar
2. Tiles
3. Category
4. Links to forms

The system displays the list of forms in a workspace in one of the following views:

- **Quick Menu** (default; shown in the screenshot above): In this view, the most commonly used forms are displayed.
- **All Items**: In this view, all forms added to the workspace are displayed.

On the workspace title bar, the system displays the view name. To toggle between these views, you click this title bar.

You can personalize the list of forms displayed in the quick menu of a workspace for you (that is, your user account) when you switch to **Configuration** mode. The changes you make affect the current user session and all future sessions. For details, see *Personalizing the Interface*.

If your user account is assigned the *Administrator* role, you can switch to Menu Editing mode and customize the workspaces and menu items for all users in the system. For details on the user interface elements of Menu Editing mode, see *Menu Editing Mode*. For more information about customizing the menu elements in the Self-Service Portal, see **Customizing the User Interface** in the Acumatica ERP System Administration Guide.

Workspace Title Bar

In the workspace title bar, you can find the workspace title, the view in which the list of workspace items are displayed (**Quick Menu** or **All Items**), and workspace title buttons (which are described in the following table).

Table: Workspace Title Bar Buttons

Button	Icon	Description
Pin		Pins the workspace to the main menu panel.
Unpin		Unpins the workspace from the main menu panel.

Button	Icon	Description
Workspace Configuration		Opens the workspace in **Configuration** mode. In this mode, you can select the forms that are displayed on the Quick Menu of the workspace.
Close Workspace		Closes the workspace and displays the page opened in the working area.
Exit		Saves your changes and closes **Configuration** mode for the workspace, returning you to the mode in which you were viewing the workspace. This button appears only if you are viewing a menu in **Configuration** mode.

Tiles

A tile is a special button on a workspace that you click to open a form with predefined settings (or, for a data entry form, with most settings blank so you can define a new entity).

Predefined workspaces contain tiles with the most popular actions and forms for the workspace. You can make a tile your favorite by clicking in the lower right corner of the tile.

If your user account is assigned the *Administrator* role, you can manage the tiles in a workspace for all system users. For details, see **Customizing the User Interface** in the Acumatica ERP System Administration Guide.

Categories

In each workspace, categories are used to group items by type, which makes it easier for users to find needed items. For example, the **Activities** category contains forms you can use to create and view cases. The system provides a predefined group of categories.

If your user account is assigned the *Administrator* role, you can manage the groups of categories in the system. For more information, **Customizing the User Interface** in the Acumatica ERP System Administration Guide.

Favorite Reports and Forms

In the workspace, you can add a form to your favorites by pointing to the form name and clicking to the left of the form name. Forms that you have added to favorites are marked with .

Menu Editing Mode

In the user interface of the Self-Service Portal, you open Menu Editing mode (see the following screenshot) by clicking the **Edit Menu** menu command on the configuration menu of the main menu. The **Edit Menu** menu command is available only to a user with the *Administrator* or *Portal Admin* role. In this mode, you can customize menu items for the whole system. For details, see **Customizing the User Interface** in the Acumatica ERP System Administration Guide.

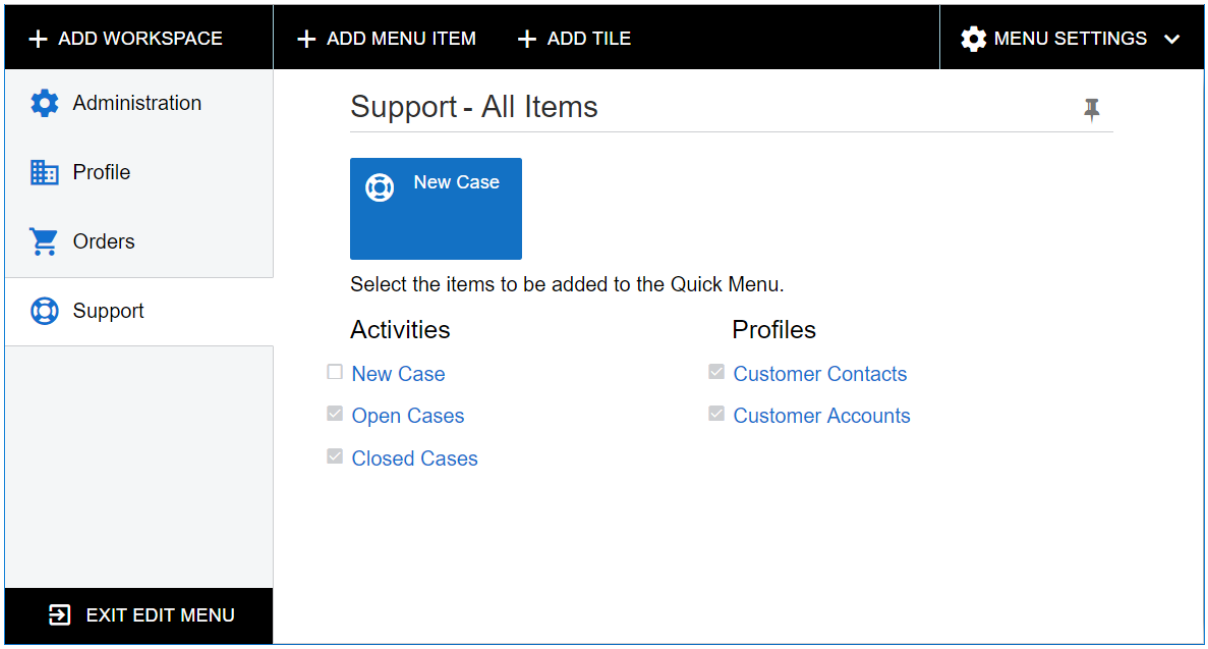


Figure: Menu Editing mode

The buttons that appear in Menu Editing mode are described in the following table.

Table: Buttons of Menu Editing mode

Button	Description
Add Workspace	Opens the *Workspace Parameters Dialog Box* with the boxes blank so you can specify these parameters and add a workspace to the UI.
Add Menu Item	Opens the *Select Forms Dialog Box* for the selected workspace. The button is available when you first select a workspace in Menu Editing mode.
Add Tile	Opens the *Tile Parameters Dialog Box* with the boxes blank so you can specify these parameters and add a tile to the selected workspace. The button is available when you first select a workspace in Menu Editing mode.
Menu Settings	Opens the *Menu Settings* menu.
Exit Menu Editing Mode	Saves your changes and exits Menu Editing mode.

Editing and Deletion of Menu Items

In Menu Editing mode, you can delete or edit the properties of the following items: workspace, category, link to a form, and tile. When you point at an item, the toolbar pops up with the Edit and Delete buttons (see the following screenshot, which shows the toolbar for the workspace title).

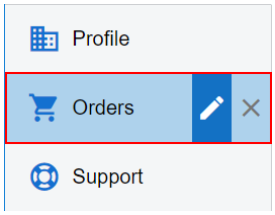


Figure: Workspace pop-up toolbar

In the following tables, you can find descriptions of the pop-up toolbars for each item type.

Table: Workspace Pop-up Toolbar

Button	Description
Edit	Opens the *Workspace Parameters Dialog Box*, which displays the parameters of the workspace.
Delete	Deletes the workspace and the tiles that belong to the workspace from the system. The forms that belong to the workspace remain in the system.

Table: Category Pop-up Toolbar

Button	Description
Edit	Opens the *Category Parameters Dialog Box*, which displays the parameters of the category.
Delete	Deletes the category from the system. The menu items under this category are moved to the **Other** category in each workspace.

Table: Form Pop-up Toolbar

Button	Description
Edit	Opens the *Item Parameters Dialog Box*, which displays the parameters of the form. Changes to the form parameters are visible in all the workspaces to which the form belongs.
Delete	Deletes the link to the form from the current workspace. The form remains in the system.

Table: Tile Pop-up Toolbar

Button	Description
Edit	Opens the *Tile Parameters Dialog Box*, which displays the parameters of the tile.
Delete	Deletes the tile from the system. You cannot restore the tile after it is deleted.

Dialog Boxes of Menu Editing Mode

In this section, you will find descriptions of all dialog boxes that you can open by using the buttons of Menu Editing mode.

Table: Workspace Parameters Dialog Box

In the **Workspace Parameters** dialog box, you can specify the parameters of a new workspace or edit the parameters of an existing workspace. You can invoke this dialog box by clicking **Add Workspace** or by clicking the Edit button on the workspace pop-up toolbar. This dialog box contains the elements described in the following table.

Element	Description
Icon	The icon that is displayed to the left of the workspace title. You can select an icon from the predefined list.
Area	The area under which the workspace is displayed on the **More Items** menu of the main menu. You can select an area from the predefined list.
Title	The title of the workspace. The title of the workspace should be unique among the workspaces in the system. If you type an existing title, the system displays a warning and does not create or update the workspace.
The dialog box contains the following buttons.	
OK	Saves your changes and closes the dialog box.
Cancel	Closes the dialog box without saving your changes.

Table: Select Forms Dialog Box

In the **Select Forms** dialog box, you can select the forms links to which are displayed in the selected workspace. This dialog box contains a list of all forms grouped by areas and categories. To add a form to the workspace, you select the check box to the left of its caption. You can find a form by typing its title or ID in the **Search** box at the top of the dialog box.

In addition to the **Search** box and the listed forms this dialog box contains (at the bottom right of the dialog box) the buttons described in the following table.

Button	Description
Add	Adds to the workspace links to the forms you have selected.
Add & Close	Adds to the workspace links to the forms you have selected and closes the dialog box.
Cancel	Closes the dialog box without adding links to the selected forms to the workspace.

Table: Tile Parameters Dialog Box

In the **Tile Parameters** dialog box, you can specify the parameters of a new tile you are adding to the selected workspace or edit the parameters of an existing tile in the workspace. The elements of this dialog box are described in the following table.

Element	Description
Icon	The icon that is displayed on the tile button. You can select an icon from the predefined list.
Title	The title of the tile. The title of the tile should be unique among the tiles in the system. If you type an existing title, the system displays a warning and does not create or update the tile.

Element	Description
Form	The Self-Service Portal form that is opened when a user clicks the tile. You can select a form from the predefined list. When you are selecting a form, you can type the first characters of the form ID or title, and the system filters the list by these characters.
Parameters	The form-specific parameters of the address line that the system adds to the form link when a user clicks the tile.
The dialog box contains the following buttons.	
OK	Saves your changes to the parameters of the tile and closes the dialog box.
Cancel	Closes the dialog box without saving your changes to the parameters of the tile.

Table: Menu Settings

In the Menu Settings menu, you can add a new category, edit parameters, or delete an existing category. You can also reset the menu to the default state.

The menu contains only the specific buttons described in the following table.

Button	Description
Reset to Default Menu Settings	Resets the settings of the whole menu (the main menu items and the workspace items) to the default settings.
Add Category	Opens the *Category Parameters Dialog Box* with blank boxes.

Table: Category Parameters Dialog Box

In this dialog box, you can specify the parameters of a new category or edit the parameters of an existing category. You can invoke this dialog box by clicking **Add Category** in the Menu Settings menu or by clicking the Edit button on the category pop-up toolbar. Elements of this dialog box are described in the following table.

Element	Description
Title	The title of the category. The title of the category should be unique within the categories defined in the system. If you type an existing title, the system displays a warning and does not create or update the category.
The dialog box contains the following buttons.	
OK	Saves your changes and closes the dialog box.
Cancel	Closes the dialog box without saving your changes.

Table: Item Parameters Dialog Box

In this dialog box, you can edit the parameters of a link to a form. You can invoke this dialog box by clicking the Edit button on the form title pop-up toolbar. Changes to the form parameters are visible in all workspaces to which the item belongs. The elements of this dialog box are described in the following table.

Element	Description
Category	The category under which the form is displayed in the workspace.

Element	Description
Title	The title of the form. You can specify a unique title, or you can specify a form title that exists in the system because forms are identified by their IDs, not titles.
The dialog box contains the following buttons.	
OK	Saves your changes and closes the dialog box.
Cancel	Closes the dialog box without saving your changes.

Help

In the user interface of the Self-Service Portal, you can click the Help button ( ) to view relevant Help information. The specific Help information you view depends on the item displayed in the working area when you click this button, as follows:

- If the working area is displaying a dashboard or a form other than a data entry form or mass-processing form (because forms of types other than data entry and mass processing are not described in documentation), the Help dashboard, which contains cards with descriptions of guides and links to them, is opened in a separate tab of a browser. For details, see *Help Dashboard*.
- If the working area is displaying a Self-Service Portal form, the reference topic that describes this form is opened in a separate tab of a browser.

The Help menu covers part of the working area. You can come back to the page that had been displayed in the working area by clicking the Help button again. The Help dashboard and Help topics are opened in separate tabs of a browser. If you want to open the Help dashboard and Help topics over the working area, you should press Ctrl and click the Help button.

Help Dashboard

The Help dashboard is the main navigation page of Acumatica ERP documentation (see the following screenshot).

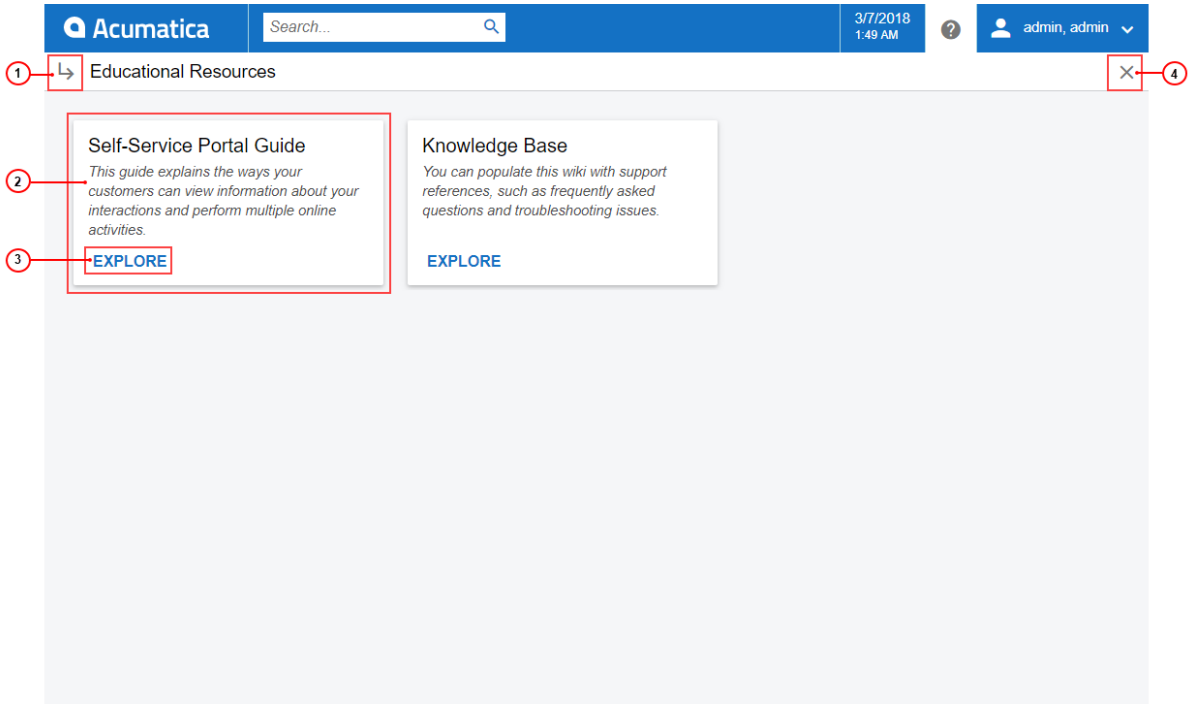


Figure: Help dashboard

1. Topic View button
2. Guide card
3. **Explore** button
4. Close Help button

By clicking the Topic View button, you switch from the Help dashboard to a Help topic. The Help topic that you last viewed in the current session is displayed. If you haven't opened any Help topic yet, you see the list of Help guides in the navigation pane.

The guide card is the card that contains a description of each guide. By clicking the **Explore** button on the guide card, you open the guide.

By clicking the Close Help button, you close the Help dashboard. The form, report, or dashboard that was displayed in the working area before you opened Help becomes visible on the screen.

Help Navigation Toolbar

When you open a Help topic, you can see the navigation toolbar, which has tools you can use to quickly switch between Help topics and to close the Help topic you are viewing (see the following screenshot).

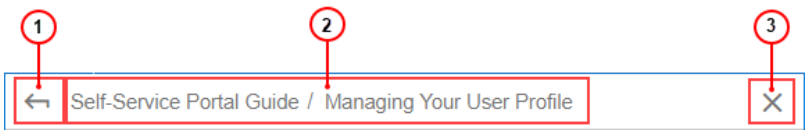


Figure: Help Navigation toolbar

1. Open Help Dashboard button
2. Path to the opened topic in the Help tree
3. Close

By clicking the Open Help Dashboard button, you open the Help dashboard (for example, if you want to switch to another guide).

Each segment of the path to the opened topic is a link to the corresponding Help topic. By clicking the link, you can open a parent topic on any level.

By clicking the Close button, you close the current topic. The form, report, or dashboard that was displayed in the working area before you opened Help becomes visible on the screen.

Search for Help Topics

You can search for information in Help in the following ways:

- By using the Help button: If you are working with a form and have questions related to the form, you can click the Help button to open a reference topic.
- By using the **Search** box: If you want to find information that is not related to the form you are currently working with, you can type a search string in the **Search** box, switch to the **Help Topics** search filter tab, and find the necessary information in the search results.
- By using navigation in Help: If you want to read all information related to a particular functional area (for example, what tools the system provides for cash management), you open the Help dashboard, open a particular guide, and in the Help topic tree, click the title of the chapter you want to read.

Form Overview

Self-Service Portal forms have an intuitive point-and-click interface, described later in this section.

A Self-Service Portal form can include only one part or a combination of parts, depending on the functionality and use of the form. The following screenshot shows a typical Self-Service Portal screen with the parts of a form that appear on it.

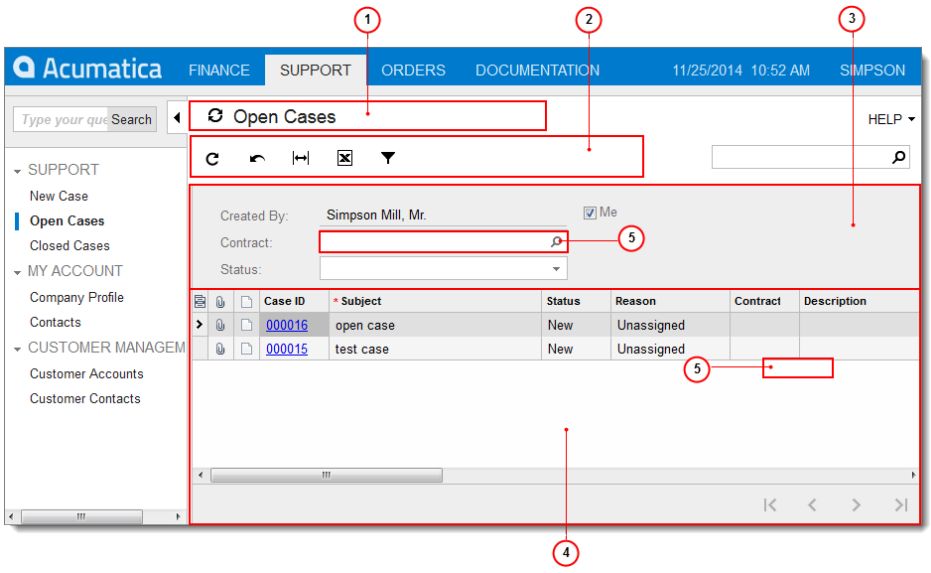


Figure: Form parts

1. Form title bar
2. Form toolbar
3. Summary or Selection area

4. Details area

Table: Form Parts

Element	Description
Form Title Bar	This bar, present on each Self-Service Portal page, includes buttons for managing the form-related information. You can use this bar to navigate to a help topic for the form and view the files and notes attached to form records. For more information, see *Form Title Bar*.
Form Toolbar	This toolbar provides data navigation and processing buttons that apply to the entire form. You can use these buttons on the documents created while using the form (for example, to cancel or save changes you've made). For more information, see *Form Toolbar Overview*.
Summary or Selection Area	The summary or selection area includes a collection of elements of different types, generally arranged in a column or multiple columns. This area may contain a summary of a document if a form contains a document or a variety of selections you can make to determine the information in the details area.
Details Area	The details area contains the data of the object or entity. On some forms, the details area contains a *table*. A table is an arrangement of similar objects or details displayed with the same number of parameters. For more information, see *Table Overview*.

Related Links

- *Table Overview*

Form Title Bar

The form title bar, located on the top of every Self-Service Portal form, includes general buttons you use to attach files and notes to the documents on form.

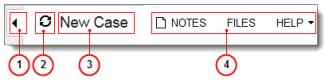


Figure: Form title bar

1. Hide Navigation Pane / Show Navigation Pane
2. Sync Navigation Pane
3. Form title
4. Menu buttons

A form title bar on a particular form includes standard and form-specific buttons.

Table: Standard Form Title Bar Buttons

The following table lists the standard buttons that a form title bar might include.

Button	Description
Show Navigation Pane / **Hide Navigation Pane**	Shows or hides the navigation pane.
Sync Navigation Pane	Displays the position of the current form or article in the main menu and the navigation pane. If you browse the forms by using the main menu and the navigation pane or if you use other navigation options to select the form, the navigation pane would not show the position of the current form. Click **Sync Navigation Pane** to synchronize the panes.
Form Title	Shows the title of the current form. You can click the form title to refresh the form.
Notes	Lets you attach notes to records. For more information, see *Attaching Notes to Records*.
Files	Lets you attach files to the form and manage the attached files. For more information, see *Attaching Files to Records*.
Help	Opens the reference topic for the currently open form. The reference topic contains descriptions of all the elements and explains how to use the form.

Related Links

- *Form Overview*
- *Attaching Notes to Records*
- *Attaching Files to Records*

Form Toolbar Overview

The form toolbar, available on most forms, is located near the top of the form, under the form title bar (see the screenshot below). The form toolbar may include standard and form-specific buttons.

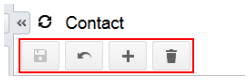


Figure: Form toolbar

You use the standard buttons on the form toolbar to insert or delete an record, save the data you have entered, or cancel your work on the form.

In addition to standard buttons, a form toolbar on a particular form may include form-specific buttons. These buttons usually let you navigate to other forms to quickly review related details and modify or process records on the form.

Standard Form Toolbar Buttons

The following table lists the standard buttons of the form toolbar. A form toolbar may include some or all of those buttons.

Table: Standard Form Toolbar Buttons

Button	Icon	Description
Save		Saves the changes made to the record.
Cancel		Depending on the context, does one of the following: • Discards any unsaved changes you have made to objects or entities and retrieves the last saved version. • Clears all changes and restores default settings.
Add New Record		Clears any values you've specified on the form, restores any default values, and initiates the creation of a new object or entity.
Delete		Deletes the currently selected object or entity, clears any values you've specified on the form, and restores default values. ⚠ You'll be able to delete a document that is not linked with another document.

Related Links

- *Form Overview*

Formatting Toolbar Overview

The formatting toolbar, which is available on forms with the text editor, is located at the top of the text editor area (see the screenshot below). The formatting toolbar may include standard and form-specific buttons.

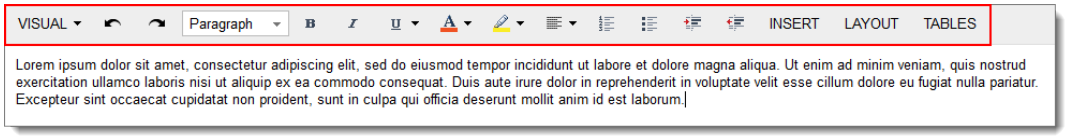


Figure: Formatting toolbar

You use the standard buttons on the formatting toolbar to write and edit text, use the clipboard, and format the text.

Standard Formatting Toolbar Buttons

The following table lists the standard buttons that a formatting toolbar might include.

Button	Icon	Description
Visual		Provides the following options: • *Visual*: Opens the editor view, where you can input and format the text. • *HTML*: Opens the editor in HTML view, where you can input multiple HTML elements. • *Plain text*: Opens the plain text view, in which all the formatting is removed. You can edit the text without formatting. • *Preview*: Opens the preview mode, where you can view the content as it will look.
Undo		Cancels the last changes you made.
Redo		Restores the changes you canceled by clicking **Undo**.
Style		Applies the selected style to the text. The following styles are available: *Paragraph*, *Header1*, *Header2*, *Header3*, *Header4*, *Header5*, *Header6*, *Preformatted*, or *Quote*.
Bold		Marks the selected text in bold style.
Italic		Marks the selected text in italic style.
Underline		Marks the selected text as underlined. You can also use the following options available in the drop-down list: • *Strike Through*: Marks the selected text as strike through. • *Subscript*: Marks the selected text as subscript. • *Superscript*: Marks the selected text as superscript.
Font Color		Changes the color of the selected text to the color you click.
Text Highlight Color		Highlights the selected text in the color you click.
Align Text Left		Aligns the selected text to the left with a ragged right margin. You can also use the following options available in the drop-down list: • *Center*: Centers the selected text. • *Align Text Right*: Aligns the selected text to the right with a ragged left margin. • *Justify*: Aligns the selected text evenly between the left and right margins.
Numbered List		Starts a numbered list or converts the selected text to a numbered list.

Button	Icon	Description
Bulleted List		Starts a bulleted list or converts the selected text to a bulleted list.
Increase Indent		Moves the paragraph farther away from the margin.
Decrease Indent		Moves the paragraph closer to the margin.
Insert		Gives you the ability to insert images, links, attachments, macros, templates, and placeholders.
Insert Image		Opens the **Insert Image** dialog box, which contains the options for inserting the image into the text area (described in the table below).
Insert Link		Opens the **Insert Link** dialog box, which contains the options for inserting the link into the text (described in the table below).
Layout		Contains the following buttons: • **Create Section**: Creates a section in the editing area. • **Remove Section**: Removes a section. • **Section Up**: Moves the section that the cursor is pointing to one level up. • **Section Down**: Moves the section that the cursor is pointing to one level down. • **One section**: Changes the markup layout by uniting a section that was divided earlier into one section. • **Two sections**: Changes the markup layout by dividing the section into two parts (sections). • **Left bar**: Changes the markup layout by dividing the section into two parts. The left part is located closer to the left margin. • **Right bar**: Changes the markup layout by dividing the section into two parts. The right part is located closer to the right margin. • **Three sections**: Changes the markup layout by dividing the section into three equal parts (sections). • **Side bars**: Changes the markup layout by dividing the section into three parts (sections) by creating side bars on the left and on the right.

Button	Icon	Description
Tables		Contains the following options: • **Create Table**: Invokes the dialog box, where you can specify the number of rows and columns and create the table. • **Insert Row Before Selected**: Inserts the row before the selected one. • **Insert Row After Selected**: Inserts the row after the selected one. • **Insert Column Before Selected**: Inserts the column before the selected one. • **Insert Column After Selected**: Inserts the column after the selected one. • **Delete Row**: Deletes the selected row. • **Delete Column**: Deletes the selected column. • **Del. Table**: Deletes the selected table.

Form Elements

In the Self-Service Portal, you use the form elements to enter information or settings to be stored in the database or used as selection criteria for presenting information on the form.

Types of Form Elements

The Self-Service Portal supports the following types of form elements:

- *Data boxes*: These boxes are designed to let you enter dates. For more information, see *Date Boxes*.
- *Lookup boxes*: You use these boxes to select values from a list of predefined values or from another information table from the database. For more information, see *Lookup Boxes*
- *Check boxes*: You select or clear a check box to turn on or turn off an option.

If a box is marked with asterisk (*), you are required to fill it in.

Unavailable Elements

When you enter data on Self-Service Portal forms, you may notice that some elements are unavailable and appear dimmed. Some of these unavailable elements are *info boxes*, read-only boxes that contain system-generated values, such as document statuses and total amounts. Other unavailable elements can be used only if a specific option is selected in another element on this form or another form.

Date Boxes

Date boxes are used specifically to enter dates.

By default, the current date is displayed in the date boxes of a form. To change the date, you can either type a specific date or select it by using the calendar.

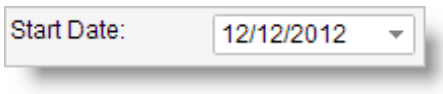


Figure: Date box

Calendar

The calendar dialog box displays the calendar page for the selected date, as shown in the screenshot below. By default, the selected date is the current date specified in the Self-Service Portal.

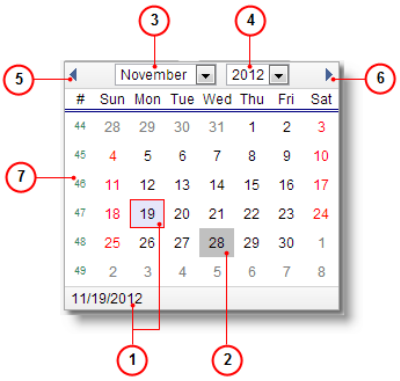


Figure: Calendar

1. Current date
2. Selected date
3. Selected month
4. Selected year
5. Previous month
6. Next month
7. Week number column

To select the date by using the calendar, follow these steps:

1. Click the Date arrow to open the calendar.
2. Browse calendar pages:
   - To change the year, click the selected year, and then click the year you want to view.
   - To change the month, click the selected month, and then click the month you want to view.
   - To view the previous month page, click the previous month arrow.
   - To view the next month page, click the next month arrow.
3. Click the selected day to close the dialog box.

The selected date is now displayed in the Date box.

Related Links

- *Form Elements*

Lookup Boxes

The Self-Service Portal uses two types of lookup boxes:

- *Drop-down list*: The currently selected option is shown in the box. Click the box arrow to see more options.
- *Lookup table*: This lookup box has a selector, indicated with a magnifier icon. Click the selector button to open a lookup table showing objects in the database and information about each object.

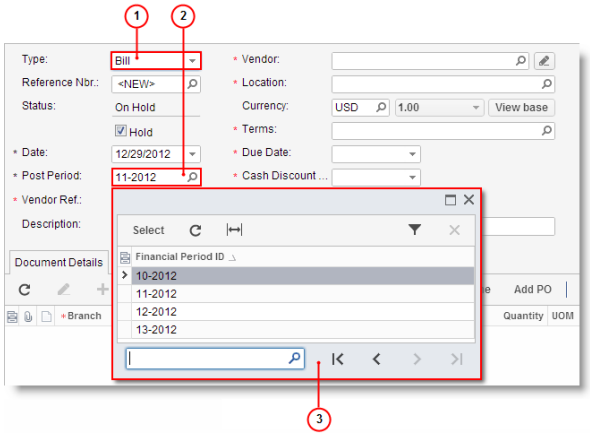


Figure: Lookup box

1. Lookup box with drop-down list
2. Lookup box with lookup table
3. Lookup table

Autocomplete

You can use Autocomplete to enter values into most lookup boxes with lookup table. You start typing in the box, and you get the list of suggestions in the lookup table with the same letters you have typed.

For example, you want to find France in the list of countries. In the **Country** box, you type `fr` and the list of countries is filtered down to include only the countries whose name include the same letters you typed as shown in the screenshot below. Now press Down Arrow key two times and press Enter to select the country.

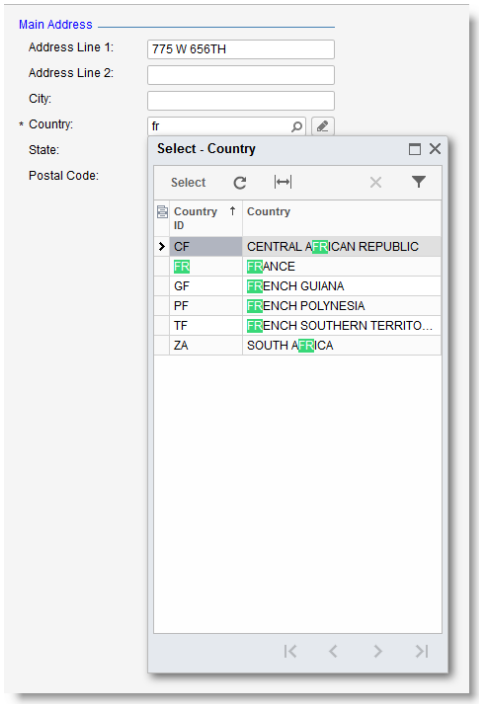


Figure: Autocomplete

How to Select a Value in the Lookup Box

- If you know the value, type it in the box and press Enter.
- If the box supports Autocomplete, start typing the value, and then select the value in the table.
- Click the magnifier icon and select the value in the lookup table.

> ⚠ You can use filtering options to display only documents with specific properties. For more information, see *Filters*.

Related Links

- *Form Elements*

Attaching Files to Records

In the Self-Service Portal, files can be attached to any record that the Self-Service Portal keeps for the objects—such as a case or an opportunity—that users add by using data entry forms. You can attach different files, such as images in various formats and scanned documents.

Attaching Files to Records

To attach a file to a record, do the following:

1. Open the form, and then select the record you want to attach the file to.
2. On the form title bar, click **Files**.
3. In the **Files** dialog box, click **Add File**.
4. In the **File Upload** dialog box, click **Choose File**, browse to the file you want to attach, select the file, and click **Upload**.

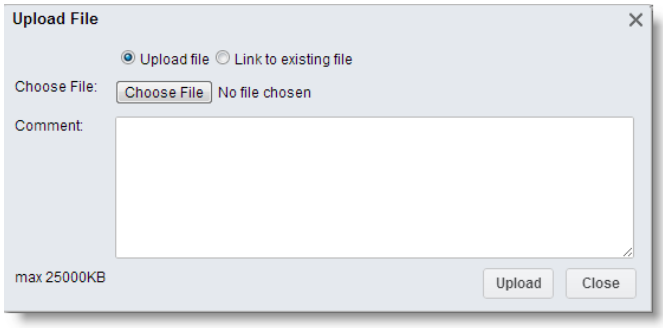


Figure: File Upload dialog box

The file is attached to the record and the counter of files attached to the selected record is incremented.

Related Links

- *Table Overview*

Attaching Notes to Records

In the Self-Service Portal, you can attach text notes to any record that the Self-Service Portal keeps for the objects —such as opportunities and cases—that users add by using data entry forms. You use these notes to communicate key information about the record or record detail to other users.

Attaching a Note to a Record

To attach note to a record, do the following:

1. Open the form, and then select the record you want to attach a note to.
2. On the form title bar, click **Notes**.

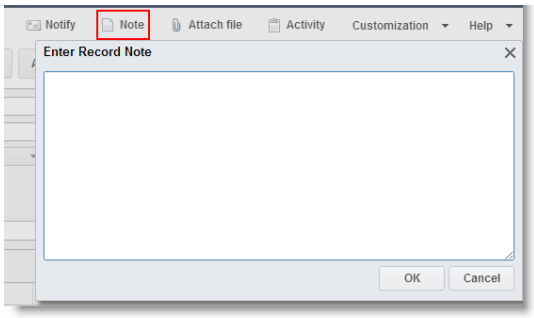


Figure: Attaching a note to a record

3. In the **Enter Record Note** dialog box, type the text of the note.
4. Click **OK**.
5. Verify that the Add Note icon has changed to the Note Attached icon, as shown in the screenshot below.

Figure: Record with attached note

You can read the note if you click **Notes** on the form title bar.

Related Links

- *Table Overview*

Table Overview

On many Self-Service Portal forms, the data is arranged in *table*s, where each row represents an object or detail (for example, an account, a subaccount, a document line, or a journal entry) and each column shows a parameter of each object or detail. The following screenshot shows a typical table.

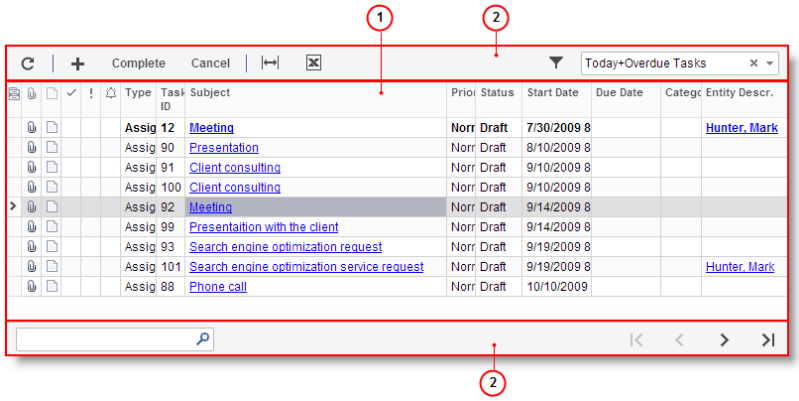


Figure: Table

1. Table
2. Table toolbar

In This Section

- *Table Toolbar Overview*
- *Changing the Table Layout*
- *Exporting to Excel*
- *Attaching Files to Record Details*
- *Attaching Notes to Record Details*

Related Links

- *Form Elements*
- *Table Toolbar Overview*
- *Changing the Table Layout*

Table Toolbar Overview

Each table on a Self-Service Portal form or dialog box has a table toolbar, which contains buttons you can use to work with the details or objects of the table.

The table toolbar buttons are grouped into sections:

- *Action section*: Contains buttons that are specific to the form and standard buttons that most table toolbars have.
- *Filter section*: Contains a box you can use to select a filter (to narrow the range of data you want to view in the table) and related buttons.

The *footer* displays navigation buttons if there are too many details or objects (that is, table rows) to fit on one page.

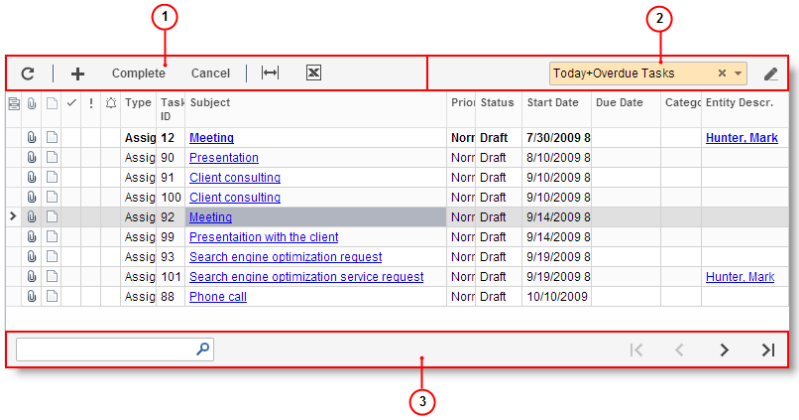


Figure: Table toolbar

1. Action section
2. Filter section
3. Footer

Table Toolbar Action Section

The table toolbar action section, commonly located in the upper-left corner of a table, can contain standard and table-specific buttons. If a table toolbar includes table-specific buttons, they are described in the relevant form reference help topic.

The following table describes the standard table toolbar buttons. A table toolbar may include some or all of those buttons.

Table: Table Toolbar Standard Buttons

Button	Icon	Description
Refresh		Refreshes the data in the table.
Add Row		Appends a new blank row to the table so you can define a new detail or object. A row may contain some default values.
Delete Row		Deletes the selected row.
Fit to Screen		Expands the form to fit on the screen and adjusts the column widths proportionally.
Export to Excel		Exports the data to an Excel file. For more information, see *Exporting to Excel*.

Table Toolbar Filter Section

You can use the filter section of the table toolbar, located in the upper right, to filter the table data. The filter section may contain some or all the elements described below.

Table: Table Toolbar Filter Section Elements

Element	Icon	Description
Add Filter		Opens the **Filter Settings** dialog box, which you can use to define a new filter.
Select Filter		Gives you the ability to select one of the available filters, apply the selected filter to the data, and display only the rows that have values matching the logical expression of the filter.
Clear Filter		Clears the filtering.

For more information about filtering, see the *Filters*.

Footer

You use the footer to search for data or to browse the table pages, if there are too many details (table rows) to fit on one page. You can see this section at the bottom of the table.

Table: Table Toolbar Navigation Section Elements

Element	Icon	Description
Go to First Page		Displays the first page of the table.
Go to Previous Page		Displays the previous page of the table.
Page Number		Opens a particular page of the table.
Go to Next Page		Displays the next page of the table.
Go to Last Page		Displays the last page of the table.

Related Links

- *Filters*

Changing the Table Layout

In the Self-Service Portal, you can adjust any table to meet your information needs. If some columns in the table are unimportant or not useful to you, you can hide them temporarily or permanently. For the remaining columns in the table, you can automatically adjust column width so that all columns fit on the screen, or you can manually adjust column widths. These changes affect only your user account and are not visible to other users.

> ⚠ When you make any changes, the table will display them immediately. If you want to see these changes when you access the form in the future, save the layout of the table.

Hiding or Displaying Columns in Tables

You use the Column Selection button, shown in the screenshot below, to change the columns to be displayed and to save the layout.

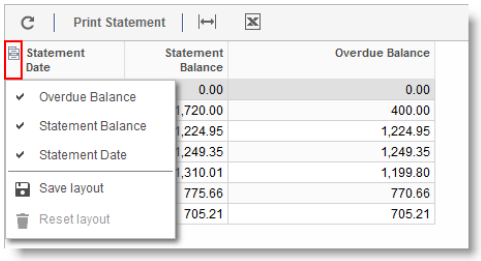


Figure: Changing the table layout

- Column Selection button

To hide or display a column in a table on a form, do the following:

1. In the table, click the Column Selection button (the leftmost icon on the table heading) to open the list of columns available for the table. Note that columns that are displayed in the table are preceded by checkmarks, while columns that are not displayed have no checkmarks.
2. Click each column name you want to display or hide; this adds or removes the checkmark.
3. Optional: When only the columns you want to display are preceded by checkmarks, click **Save Layout** to save the changes.

Adjusting Column Widths

If not all columns fit on the screen and you must scroll the form to the right to view some of them, you can adjust the column width so that you can view all columns on the screen without scrolling. You might not see some column headers in their entirety, if their full text cannot be shown in the reduced column width, but making this adjustment will display all the columns.

To adjust the column width automatically, do the following:

1. On the table toolbar, click **Fit to Screen**. The widths of the columns will be reduced proportionally so that the whole table will fit the screen.
2. Optional: To save the changes, click the Column Selection button, and then click **Save Layout**.

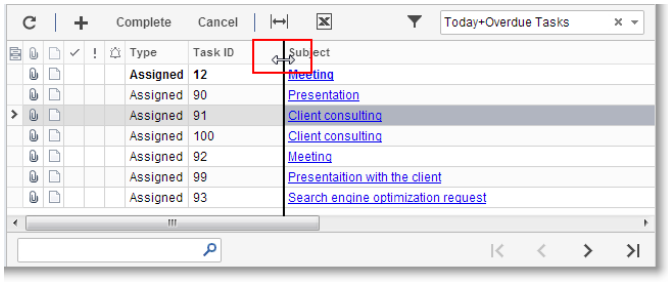


Figure: Adjusting column widths manually

To change the width of certain columns manually, do the following:

1. Move the pointer over the column split line. When the pointer becomes a double-headed arrow, as shown in the screenshot above, drag the pointer to move the line.
2. Repeat this step for each column split line you want to move.
3. Optional: To save the changes, click the Column Selection button, and then click **Save Layout**.

Changing the Order of Columns

At times, you might want to change the order of columns so that the information is grouped to better fit your work and preferences.

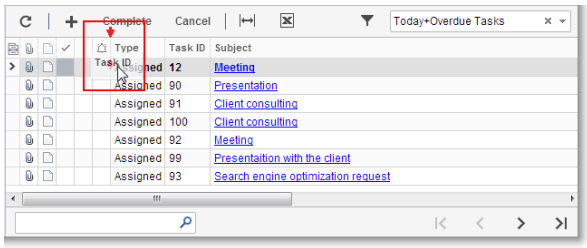


Figure: Moving a column to another position in the table

To move columns to other positions in the table, do the following:

1. In the table header, drag the column heading to the desired position. Note the red arrows (see the screenshot above) that indicate the exact position where you can drop the column between two other columns.
2. Repeat this step for each column you want to move.
3. Optional: To save the changes, click the Column Selection button, and then click **Save Layout**.

Related Links

- *Table Overview*

Working with Tables

Whether you enter new data or view the results of an inquiry, you may need to perform specific operations with tables; typical operations are discussed below.

For instructions on adjusting table layout, see *Changing the Table Layout*.

Switching between Form View and Grid View

On data entry forms, tables can be presented in grid view or form view, as shown in the screenshots below:

- **Grid view**. A standard tabular view, with all details arranged in a table and each row representing one detail or document line.

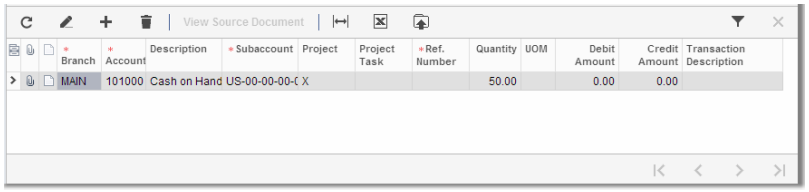


Figure: Table grid view

- **Form view**. A set of elements intended for only one detail or document line; you use the navigation buttons (in the lower left corner of the form) to move from one detail to another.

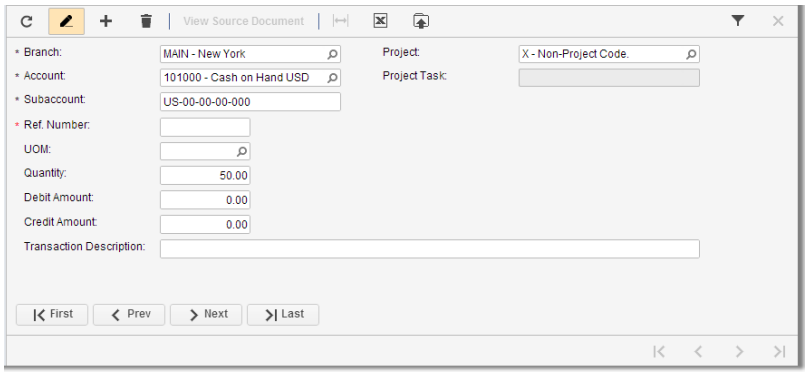


Figure: Table form view

To switch between these two views, you click **Switch Between Grid and Form** on the table toolbar.

Adding a Row to the Table

To add a row to a table, you do one of the following:

- On the table toolbar (in any view), click **Add Row**.
- In the grid view, click anywhere in the table below the existing table rows.
- In the form view, click **Next**.

The system appends a new row to the table, and you can fill out all required boxes (and any optional ones) for a new detail or object. You can click in any box to display its controls. Some boxes have selectors and some have input validation masks; for some boxes, you can type the value directly. For more information about data input, see *Form Elements*.

Deleting a Row from the Table

If you need to delete a row from a table, do the following:

1. Make sure the object specified in the row is not used in the system. For example, if it is a ledger, no transactions should be posted to it; if it is a class, it should have no members; and if it is a document detail line, the document should not be released.
2. In the table, click the row to select it.

3. On the table toolbar, click **Delete**.
4. On the form toolbar, click **Save**.

Selecting Objects in the Table

Some forms have a Select column (with a check box as a header) that you can use as follows to select objects from the table:

- To select particular objects, click the check box in the Select column for each object.
- To select all objects displayed on the current page of the table, click the Select check box in the column header.

Filtering and Sorting

You might find it helpful to narrow and rearrange the range of displayed objects before selecting particular ones. For more information, see *Filters*.

Attaching Files to the Table Rows

You can attach a file or multiple files, such as a scanned image of the original document or its electronic version, to each row. For more information, see *Attaching Notes to Record Details*.

Attaching Notes to the Table Rows

You can attach a note to each row. For more information, see *Attaching Notes to Record Details*.

Exporting to Excel

Many users, having worked with Microsoft Excel for years, prefer to perform detailed financial analysis using an Excel spreadsheet on their desktop. For such users, the Self-Service Portal broadly supports integration with Microsoft Excel.

> The Self-Service Portal uses the spreadsheet format introduced in Microsoft Office 2007, so if you use an earlier version of Microsoft Office, you should install the appropriate plug-in.

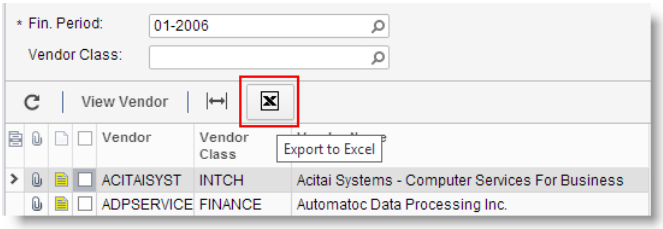


Figure: Export to Microsoft Excel

To Export Data to Microsoft Excel

1. Open the form whose data you want to export.
2. In the summary or selection area (if any), use the form elements or navigation buttons to select the data displayed in the table.

3. Optional: Further select the data for export by filtering. For more information on using filters, see *Filters*.
4. On the table toolbar, click **Export to Excel** ( ).
5. Follow the necessary steps, depending on your browser and settings, to download the Excel file with the exported data.

Updating Excel Files

If you exported the data from an inquiry form to an Excel file, you can update your Excel file from the Self-Service Portal database. You can retrieve the data from the web and update the file contents without again exporting data from the system and repeating all post-export configuration steps.

To update an Excel file, do the following:

1. Open the file.
2. When you're prompted, enable editing and enable external data connections so that Excel can update the file.
3. Refresh the data. Do the following:
   - In Microsoft Excel 2007, 2010, and 2013: On the **Data** tab, in the **Connections** group, click **Refresh All**.
   - In Microsoft Excel 2003: On the **External Data** toolbar, click **Refresh All**.

   When you are prompted to authenticate yourself, enter your Self-Service Portal username and password.

The contents of the file are updated with the filtering criteria you specified on the inquiry form before exporting the data. If the filtering criteria includes the default values, such values will be updated as well. For example, if the filtering criteria includes the current financial period, when the period is changed in the system, it will be automatically updated in the file.

Additionally, you can aggregate data from several forms to one Excel workbook and use the file as you want—for example, as a source for summarizing and analyzing data. Do the following:

1. Export data from the form you want to use.
2. Copy the sheets from the exported files to one Excel workbook and save the resulting file.

Once you have performed these steps, when you refresh data in Excel, the data on all spreadsheets will be updated simultaneously.

Related Links

- *Filters*

Attaching Files to Record Details

In the Self-Service Portal, files can be attached to any record detail, which is a particular line in the record that you add by using data entry forms. You can attach different files, such as images in various formats and scanned documents.

Attaching a File to a Record Detail

To attach a file to a record detail, do the following:

1. Open the form, select the record, and then select the record you want to attach the file to.
2. In the table, at the beginning of the detail row you want to attach the file to, click Attach File ( ), as shown in the screenshot below.

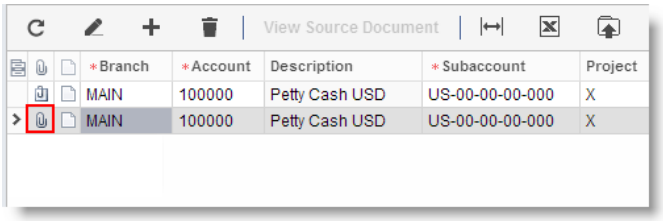


Figure: Attaching a file to a record detail

3. In the **Files** dialog box, click **Add File**.
4. In the **File Upload** dialog box, click **Choose File**, browse to the file you want to attach, select the file, and click **Upload**.

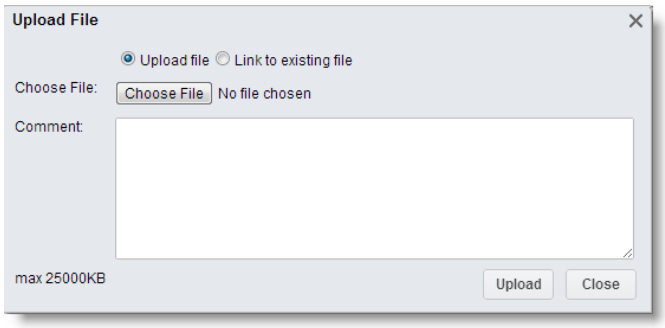


Figure: File Upload dialog box

5. Verify that the Attach File ( ) icon has changed to the File Attached ( ) icon, as shown in the screenshot below.

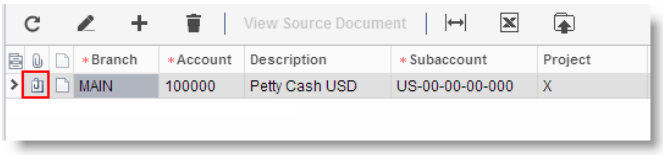


Figure: Record detail with attached file

Related Links

- *Table Overview*

Attaching Notes to Record Details

In the Self-Service Portal, you can attach text notes to any record detail, which is a particular line in the record. By using these notes, you can communicate key information about the record or record detail to other users.

The process of attaching notes, described below, is similar to the process of attaching files.

Attaching a Note to a Record Detail

To attach a note to a record detail, do the following:

1. Open the form, and then select the record you want to attach the note to.
2. In the table, at the beginning of the detail row you want to attach the note to, click Attach Note.

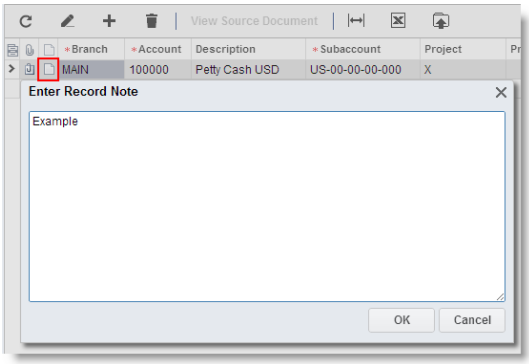


Figure: Attaching a note to a record detail

3. In the **Enter Record Note** dialog box, type the text of the note.
4. Click **OK**.
5. On the form toolbar, click **Save**.
6. Verify that the Add Note button has changed to the Note Attached button, as shown in the screenshot below.

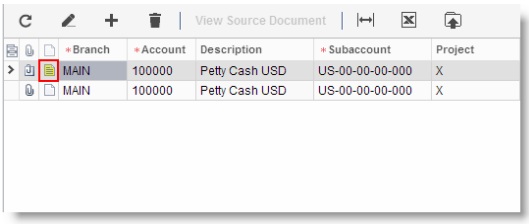


Figure: Record detail with attached note

7. On the form toolbar, click **Save**.

To read the note, open the form, select the record, select the record detail with the note attached, and click Note Attached.

Managing Attached Files

With the Self-Service Portal, you can easily manage and track files and images attached to records and record details for various purposes.

Related Links

- *Table Overview*

Search

Searching in the Self-Service Portal gives you the ability to quickly open a form or find a help topic with required information.

Basic Search

To start a search, type a word, form number, or a phrase in the **Search** box of the navigation pane (see the screenshot below).

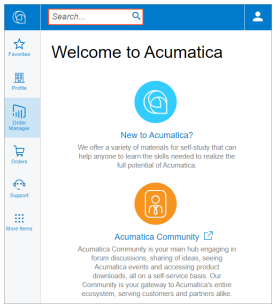


Figure: Search box

Search Results

The search results appear in the **Screen**, **Profiles**, or **Help** tabs.

Click required form or article title to open it.

Related Links

- *Search Form*

Filters

In the Self-Service Portal, forms often use tables to present data in ways that users can easily comprehend. But when a single table becomes several pages long, gleaning needed information from it becomes a challenge. Filters give you a means to display only those records that you want to see at the moment.

The Self-Service Portal has three types of filters, described in this section. The major difference in filter functionality is related to the way the filters can be used:

- *Column Filters and Sorting* (simple filters that are available on most form tables): Quickly add filters and sorting to table columns. Such filters cannot be saved.
- *Ad Hoc Filters* (filters that are available on data entry forms): Create and apply complex filters when you want to; such filters cannot be saved.
- *Advanced Filters* (filters that are available on processing forms): Create and apply complex filters, and save them for future use. You can create such filters for your personal use and for sharing with other users. Also, you can set an advanced filter as the default one. For details, see *Managing Advanced Filters*.

For the description of the filtering by using the **Filter Settings** dialog box, see *Filter Settings Dialog Box*.

Column Filters and Sorting

You can set up a column filter for almost any table to display only table rows for which this column meets particular criteria; you can then sort the data to best meet your information needs. Those filters cannot be saved and then reused at a later time.

To Set Up a Column Filter

1. In the table, click the column heading.
2. Select the filter condition from the list of available conditions.
3. In the box at the bottom of the menu, type the filter value.

4. Click **OK** to apply the filter.

Now in the table you see only the rows that satisfy the filter condition. The column header is highlighted and displays the filter icon ( ).

You can set up filters for any number of table columns.

To Clear a Column Filter

1. In the table, click the column heading, and then click **Clear Filter**.
2. Repeat Step 1 for every filter you want to turn off.

To Turn On Column Sorting

1. In the table, click the column heading.
2. Select the sorting order—ascending or descending (that is, A to Z or Z to A for text, lower to higher or higher to lower for numbers, or newest to latest or latest to newest for dates).

The column heading displays the ascending ( ) or descending ( ) sorting icon.

> You can turn on sorting for only one column.

To Turn Off Column Sorting

- In the table, click the column heading and click the sorting option you'd previously selected.

The column sorting is now turned off.

Filter Conditions

To create a filter, you create conditions for the form the filter will be applied to. A filter may contain just one condition, or it may contain multiple simple condition lines, each on its own row of the table, that you combine into one logical expression by using brackets and logical operators.

Table: Filter Table Columns

Column	Description
Select	An unlabeled check box that you use to select conditions you want to be active. As you specify a condition, it becomes active, with the Select check box automatically selected. To quickly modify the filter, you can clear check boxes for some of the conditions to exclude them from the filter. This check box is not, however, available for reports.
Brackets	A set of opening brackets used to group logical conditions. You can use brackets to form filters with multiple lines.
Property	Required. The property, which you select from a list that includes the properties associated with the particular table the filter will be applied to.

Column	Description
Condition	Required. The logical operation that applies to the value of the selected property, such as *Equals*, *Does Not Equal*, *Is Greater Than*, *Is Less Than or Equal To*, *Contains*, *Starts With*, *Does Not Contain*, *Is Between*, *Is Empty*, or *Is Not Empty*.
Value	The value for the logical condition used to specify the criteria of data you want to view. You can either type a value or select one from the list of possible values for the property.
Second Value	The second value for the logical condition, if the selected logical condition requires a second value. (For example, the *Is Between* logical condition requires a second value.)
Brackets	A set of closing brackets to group logical conditions. You use brackets to form filters with multiple condition lines.
Operator	The logical operator (*And* or *Or*) to be used between groups of logical conditions. You select this operator to join the current condition with the following.

To specify filter conditions, do the following:

1. In the filter conditions table, add a new row.
2. In the table row, specify the condition.
3. Repeat Steps 1 and 2 for each additional condition.
4. Click the Select check boxes in the table rows for the active conditions.

Filter Example

For example, if you want to filter transactions with batch numbers greater than 3800 that were entered in March 2006, you specify the condition rows as shown in the following screenshot.

		Brackets	*Property	*Condition	Value	Second Value	Brackets	Operator
	☑		Batch Number	Is Greater Tha	00003800			And
>	☑		Transaction Date	Is Between	3/1/2006	3/31/2006		

Related Links

- *Ad Hoc Filters*
- *Advanced Filters*

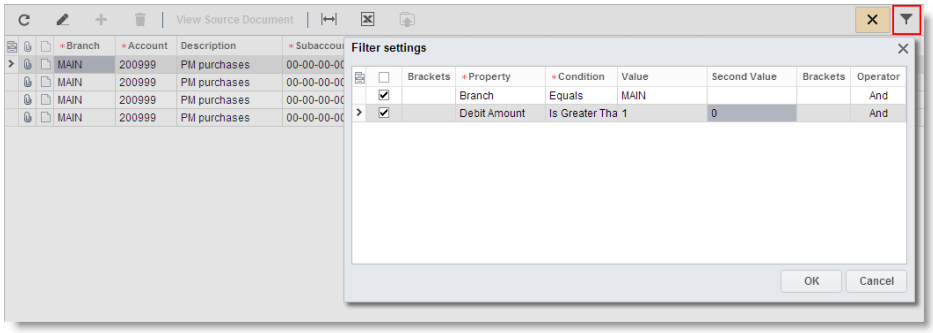
Ad Hoc Filters

On data entry forms, you can set up ad hoc filters, which display only the data you need at the moment. The filters you create on such forms cannot be saved and then reused at a later time.

Ad Hoc Filter on Data Entry Form

Follow these steps to set up an ad hoc filter for a data entry form:

1. Open the data entry form.
2. On the table toolbar, click **Add Filter**.



3. In the **Filter Settings** dialog box (as shown above), click somewhere below the header row or the last row to add a new row.
4. Specify conditions for the filter. For more information about filter conditions, see *Filters*.
5. Click **OK** to apply the filter.

   The **Cancel Filter** button becomes highlighted to indicate that the filter has been applied, and the data you see on the form matches the filter conditions.

To modify the filter conditions, do the following:

1. On the table toolbar, click **Add Filter**.
2. In the **Filter Settings** dialog box, modify the filter conditions:
   - Click the Select check box to specify the active conditions.
   - Modify filter conditions.
   - Add or remove filter condition lines.
3. Click **OK** to apply the filter.

To cancel filtering on the table, do the following:

- On the table toolbar, click **Cancel Filter**.

Related Links

- *Filters*

Advanced Filters

Advanced filters, available on processing forms, are created once and can be reused at a later date. Those filters are form-specific—meaning that a reusable filter can be applied to one specific form.

You can create and manage advanced filters by using the **Filter Settings** dialog box, which you invoke directly from the processing or inquiry form for which the filter is intended.

The filters section of the table toolbar is used to apply and cancel filtering, and to create, delete, and manage your advanced filters for the form. You can see the available filters listed in the **Select Filter** box of the table toolbar. This list includes the system advanced filters, the advanced filters you created, and the advanced filters other users have created and shared.

If a filter has been applied to the table, you can see the name of this filter in the **Select Filter** box on the table toolbar. If the default filter for this form is specified, the name of this filter is displayed in the **Select Filter** box when you open that form.

For more information about the filters section of the table toolbar, see *Table Toolbar Overview*.

Categories of Advanced Filters

Reusable filters have categories that define the use of the filter. For example, if you define a filter as default, this filter is automatically applied to the form when this form is opened.

Table: Filter Categories

Check Box	Description
Default	Indicates that this is the default filter for the selected form.
Shortcut	Indicates that the form with this particular filter applied will be available if you click the link on the dashboard, if the form was added to a dashboard.
Shared	Indicates that the filter will be shared with other users. If it is checked, the filter is shared, no matter who created it.

Managing Filters in Forms

You can manage filters that can be applied to the table of the particular form by using the **Filter Settings** dialog box of that form.

To open the **Filter Settings** dialog box, do the following:

1. Open the form.
2. On the table toolbar, click **Add Filter**.

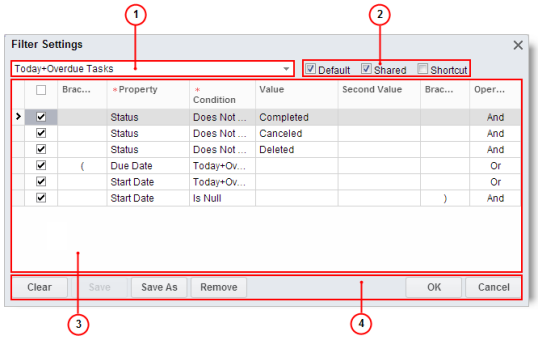


Figure: Filter settings

1. Filter name
2. Categories
3. Filter conditions
4. Buttons

Table: Filter Settings Elements

Element	Description
Filter name box	Lists the names of the filters that can be applied to the currently selected form. You can click the filter name to see the details of the filter.

Element	Description
Categories	Shows the filter usage. You can select the categories for the currently selected filter from the list of available, as described in *Categories of Reusable Filters* section.
Clear	Clears all changes and restores default settings to let you specify a new filter.
Save	Gives you the ability to enter a name for the new filter and saves it, or saves the existing filter after you have modified it.
Save As	Saves the filter under a new name.
Remove	Deletes the filter from the system.
OK	Applies the filter and closes the dialog box.
Cancel	Closes the dialog box without filtering the data.

To create an advanced filter directly from the form to which it would be applied to, do the following:

1. Open the form you want to add a filter to.
2. On the table toolbar, click **Add Filter**.
3. In the **Filter Settings** dialog box, click anywhere in the table below the existing table rows.
4. Specify conditions for the filter. For more information about filter conditions, see *Filters*.
5. Select the filter categories:
   - If you want to use this filter as the default filter for the current form, select the **Default** check box.
   - If you want to share this filter with other users, select the **Shared** check box.
6. Click **Save**.
7. In the **Enter the filter name here** dialog box, type the name of the newly defined filter.
8. Click **OK**.
9. Click **Save** to save the filter.
10. Click **OK** to close the **Filter Settings** dialog box and apply the filter.

To modify an advanced filter in the form that this filter can be applied to:

1. Open the form you want to add a filter to.
2. On the table toolbar, click **Add Filter**.
3. In the **Filter Settings** dialog box, click the filter name box and select the filter.
4. Do any of the following to modify the filter:
   - Click the Select check boxes in the table rows to select the active conditions of the filter.
   - Click below the last condition row to add a new row, and then specify the new condition.
   - Click the categories check boxes to specify the filter categories.
5. Do one of the following to save the changes:
   - If the filter is one of your user-created filters, click **Save**.
   - If the filter is a system filter, then you can't save changes to this particular filter and the **Save** button is unavailable. In this case, click **Save as** and specify the new filter name to create a new filter based on the system filter.
6. Click **OK** to close the dialog box.

To delete an advanced filter from the form this filter can be applied to:

1. Open the form.
2. On the table toolbar, click **Add Filter**.
3. In the **Filter Settings** dialog box, click the filter name box and select the filter.
4. Click **Remove**.
5. Click **OK** or **Cancel** to close the dialog box.

Setting Default Filter

If an advanced filter was selected as a default for a specific form, this filter is applied automatically when you open the form. The name of the default filter is shown in the **Select Filter** box.

To select an advanced filter as the default form filter, do the following:

1. On the table toolbar of the form, click **Add Filter**.
2. In the **Filter Settings** dialog box, click the filter name box and click the filter name.
3. Select the **Default** check box, and then click **Save**.
4. Click **OK** to close the dialog box.

Applying Advanced Filter

To apply one of the available advanced filters to the conditions table displayed on a form, do the following:

- On the table toolbar, click the **Select Filter** arrow and select the filter you want to apply.

An advanced filter may contain active and inactive conditions, and you can easily modify the advanced filter by changing the active status of conditions before applying the filter. To select the active conditions of the advanced filter and apply this filter, do the following:

1. On the table toolbar, click **Add Filter**.
2. In the **Filter Settings** dialog box, click the filter name box and select the filter.
3. Click the Select check boxes to select the conditions you want to use.
4. Click **OK** to apply the filter.

Canceling Filtering

If you want to view a table without filter effects, you need to cancel the filtering.

To cancel the currently applied reusable filter, do the following:

- On the table toolbar, click **Cancel Filter**.

Reports

Once you open the report, the prepared report appears on your screen. You can print the report or export the report to a file.

Report Toolbar

The following table lists report toolbar buttons.

Buttons	Icon	Description
Parameters		Navigates back to the report form to let you change the report parameters.
Refresh		Refreshes the information displayed in the report (if any data changes were made).
Groups		Adds to the report a left pane where the report structure is shown. Click a report node to highlight the pertinent data in the right pane.
View PDF / **View HTML**	/	Displays the report as a PDF, or displays the report in HTML format. The available button depends on the current report view; if you're viewing a PDF, for instance, you will see the **View HTML** button.
First		Displays the first page of the report.
Previous		Displays the previous page.
Next		Displays the next page.
Last		Displays the last page of the report.
Print		Opens the browser dialog box so you can print the report.
Send		Opens the **Email Activity** dialog box, which you use to send the report file (in the chosen format) to the specified email address.
Export		Enables you to export the data in the chosen format (Excel or PDF).

Related Links

- *Filters*
- *Ad Hoc Filters*
- *Reports*

Self-Service Portal Documentation

You can find helpful information in the **Documentation** section of the Self-Service Portal. All the articles are organized in wikis. The Self-Service Portal wiki includes the basic information on using the Self-Service Portal, and the other wikis contain other useful information.

Wiki Overview

Any time you want to, you can refer to the online product documentation supplied with the Self-Service Portal. These materials can be found in the **Documentation** section of the application.

You can locate a wiki article in one of the following ways:

- *By getting the reference article that describes the form you are viewing*: On the form toolbar of the active form, click **Help**.
- *By searching in wikis*: In the navigation pane, in the **Search** box, type a word, part of a word, or a phrase; then click **Search**. You will see the search results in the *Search Form* form; click an article you want to view. For more information, see *Search*.

Knowledge Base Overview

The wikis may contain the information your vendor makes available for you, such as product specifications, surveys, and knowledge base (KB) articles. You can rate the articles and submit feedback if the wiki permits feedback. For more information about KB articles, see *Knowledge Base*.

Related Links

- *Search*
- *Help*

Knowledge Base

The Knowledge Base (KB) wiki is designed to contain support references, such as information on specific solutions, frequently asked questions (FAQ), and common troubleshooting issues and their resolutions. The KB articles are created by our support professionals to ensure that you have access to all useful information.

Viewing a KB Article

A typical KB article includes the following information:

- **Title**: The number and the title of the KB article
- **Category**: The category the article affects
- **Applies to**: The product the article is applied to
- **Last modified**: The date and time of the last modification of the article
- **Views**: The number of times the article has been viewed
- **Rating**: The article rating
- The contents of the article: The symptoms, the cause, and the resolution of the problem
- **Related Links**: Optional; links to additional information you might find useful

Searching for KB Articles

You can browse the wiki by using the navigation pane or search for specific articles. While searching for articles, you can use filters and sorting to get the results more quickly and easily. For more information, see *Search*.

Rating Articles

You can rate the article you are reading to help us assess the quality of the articles, if available.

To rate an article:

- On the feedback bar at the bottom of the article, in the **Rate this article** box, select the rate that corresponds to your thoughts about how helpful the article is, and click **Rate**.

Submitting Feedback

We welcome any feedback you may have to help us improve. Any time you are seeking assistance or just browsing the wiki, you can provide comments. Also, if you don't find the information you are looking for, you can post a suggestion for a new article. The more information you provide about the information you need, the better we will be able to understand and assist you.

To submit feedback:

1. On the feedback bar at the bottom of the article, click **Feedback**.
2. In the **Feedback** dialog box, answer the available questions.
3. Click **Submit** at the top of the dialog box.

Shortcut Keys

You can invoke the most common operations in the Self-Service Portal through keyboard shortcuts, as described in this topic.

Form Toolbar Shortcuts

The following table contains the keyboard shortcuts that you can use to execute form toolbar commands.

Key	Corresponding Toolbar Button
Ctrl+S	**Save**
Esc	**Cancel**
Ctrl+Insert	**Add New Record**
Ctrl+Delete	**Delete**
Page Up	**Go to Previous Record**
Page Down	**Go to Next Record**

Summary Area Shortcuts

The following table contains the keyboard shortcuts you can use for navigating the summary area of any form.

Press This Key	To Do This
Tab	Move forward to the next element (respective to the current placement of the cursor).
Shift+Tab	Move back to the previous element.
F3	Open the lookup table of the element where the cursor is, if applicable, so you can search for a value.

Table Navigation Shortcuts

The following table contains keyboard shortcuts you can use to navigate tables on any forms. The system navigates based on the current location of the cursor.

Press this key	To Do This
Arrow keys	Move one cell up, down, left, or right (depending on the key) in the table.
Home	Go to the first column in the current row.
End	Go to the last column in the current row.
Ctrl+Home	Go to the first row in the same column.
Ctrl+End	Go to the last row in the same column.
Page Up	Go to the first row in the same column.
Page Down	Go to the last row in the same column.
Shift+F	Filter the data in the table.
F5	Refresh the data. (If the cursor is set in a table cell).
Double-click under the last row	Append a new row.
Enter or F2	Switch to editing mode.
F4	Switch between grid and form modes.
F3	Open the lookup table so you can search for a value.
Tab	Move forward through cells.
Shift+Tab	Move back through cells.

Press this key	To Do This
Ctrl+Left Arrow	Move the cursor to the beginning of the next segment of the element if the element has multiple segments (for example, when you enter a subaccount).
Ctrl+Right Arrow	Move the cursor to the beginning of the previous segment of the element if the element has multiple segments (for example, when you enter a subaccount).

Calendar Navigation Shortcuts

When you click the arrow of a date box on a form, the Calendar dialog box is brought up. You can use the Calendar dialog box to select a new date, which will appear in the date box. The following table displays the keyboard shortcuts you can use to navigate the Calendar dialog box on any form.

Press This Key	To Do This
Left Arrow	Move the cursor to the previous day.
Right Arrow	Move the cursor to the next day.
Up Arrow	Move the cursor one week earlier.
Down Arrow	Move the cursor one week later.
Enter	Fill in the date box with the selected date and close the dialog box.

Date Box Shortcuts

Any date consists of the date components—that is, month, day, and year—that you enter to define a calendar date in a date box. The following table displays the keyboard shortcuts you can use to change the selected date once you have clicked in the date box on any form.

Press This Key	To Do This
Up Arrow + + on the numeric keypad	Increase the selected component of the date by 1.
Down Arrow - - on the numeric keypad	Decrease the selected component of the date by 1.
. / . on the numeric keypad / on the numeric keypad Right Arrow	Move the cursor to the next component of the date.

Press This Key	To Do This
Shift + . Shift + / Shift + / on the numeric keypad Left Arrow	Move the cursor to the previous component of the date.