Consultant Guide

Arena Solutions Integration 2026 R1

Acumatica
The Cloud ERP

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Integrating Acumatica ERP with Arena Solutions: General Information

Companies that manufacture complex products or are in regulated industries (such as medicine) need to capture requirements, track compliance, and control changes. To address these challenges, many of these organizations implement product lifecycle management (PLM) systems, such as Arena Solutions. The Acumatica ERP native connector for Arena Solutions streamlines the data synchronization between Arena Solutions and Acumatica ERP.

In this topic, you will find general information about the integration between Arena Solutions and Acumatica ERP.

Product Lifecycle Management Systems

Organizations that use product lifecycle management systems, such as Arena Solutions, usually have engineers who design new products and work with product management and marketing to bring the products to market. Requirements, restrictions (such as environment and regulatory compliance), and decisions must be captured and made available to the engineer as the part of the design process. The engineer needs a PLM system to collaborate, as well as to manage projects. Once a new product is finalized, the PLM system can provide a streamlined mechanism to push revisions to the ERP system in which production orders will be created for product manufacturing. The set of product requirements and components managed by using a PLM system is called the *engineering bill of material* (*EBOM*).

PLM systems are typically deployed by companies in the following industries:

- Aerospace and defense
- Automotive and other transport
- Electronics and high-tech (high-tech consumer devices, semiconductors, telephony and satellites, and medical devices)
- Fabrication and assembly
- Process and consumables (pharmaceutical and food and beverage)
- Construction and shipbuilding)
- Utilities

Engineering Change Control

Both Acumatica ERP Manufacturing Edition and Arena Solutions support controlling changes in products. The engineering change control functionality in Acumatica ERP Manufacturing Edition provides the ability to manage changes in bills of material and supports approvals of changes. Arena Solutions provides the additional features listed in the following table.

You can use either Acumatica ERP Manufacturing Edition or Arena Solutions for the engineering change control functionality. If on the *Enable/Disable Features* (CS100000) form, the *Arena PLM Integration* feature is enabled, you cannot enable the *Engineering Change Control* feature.

Table: Comparison of Features Supported by Acumatica ERP Manufacturing Edition and Arena Solutions

Feature	Acumatica ERP Manufacturing Edition	Arena Solutions
Change request management	+	+
Change approval control	+	+

Feature	Acumatica ERP Manufacturing Edition	Arena Solutions
BOM compare and redline	+	+
Demand analysis	+	+
Where-use reporting	+	+
Requirements management	-	+
New product introduction	-	+
Item revision management	-	+
Compliance tracking	-	+
Supplier access and assembly sharing	-	+
Quality tracking (cause analysis, correction, and prevention of quality issues)	-	+
Training plans	-	+

Data Ownership

When Acumatica ERP and Arena Solutions are integrated, the following entities are managed in Arena Solutions and imported into Acumatica ERP:

- Stock items and their attributes
- Vendors specified in item settings
- Sales categories specified in item settings
- Bills of material

The following entity is managed in Acumatica ERP and exported to Arena Solutions: vendors.

On the following diagram, you can see the data ownership and flow directions.

Figure: Data ownership

Changes in Acumatica ERP

When integration with Arena Solutions is implemented, the functionality of Acumatica ERP is changed as follows:

1. The *Engineering Change Control* feature cannot be enabled on the *Enable/Disable Features* (CS100000) form.
2. Users cannot create stock items of the classes specified on the **Other** tab of the *Arena Integration* (BCAR2010) form.
3. Users can add to operations of a bill of material only materials specified in the engineering bill of material in Arena Solutions. Material settings—such as quantities, units of measure, and reference designators—are also managed in Arena Solutions and are unavailable for editing in Acumatica ERP.
4. Vendors specified on the **Vendor Details** tab of the *Stock Items* (IN202500) form cannot be added or deleted for stock items that are synched with Arena Solutions.
5. Users cannot change the following settings of a stock item synched with Arena Solutions on the *Stock Items* form: inventory ID, item status, description, attributes, and sales categories.

Integration Limitations

The following capabilities are outside of the scope of the current implementation of the integration:

- Support of the Arena Solutions quality module
- Initial export of items, vendors, and sales categories from Acumatica ERP
- Attribute synchronization
- Bills of material that contain phantom items
- The ability to assign rank and split values to suppliers in Acumatica ERP
- Import of files and documents from Arena Solutions
- Export of item costs from Acumatica ERP
- Export of changes in vendor contacts from Acumatica ERP
- Item revision synchronization
- Import of changes in item numbers in Arena Solutions

Initial Configuration of Acumatica ERP and Arena Solutions

When you integrate Acumatica ERP and Arena Solutions, you first need to prepare both systems properly and perform an initial sync of the data. In this chapter, you will find details about the initial configuration of Acumatica ERP and Arena Solutions and the initial data synchronization.

Initial Configuration: General Information

When you initially configure integration between Acumatica ERP and Arena Solutions, you need to set up an Arena Solutions workspace, establish a connection between the Acumatica ERP instance and Arena Solutions, and perform the initial data synchronization.

Learning Objectives

In this chapter, you will learn how to do the following:

- Prepare an Arena Solutions tenant for integration
- Prepare an Acumatica ERP instance for integration
- Perform initial data synchronization between the systems

Applicable Scenarios

You implement the integration of Acumatica ERP and Arena Solutions when your organization uses both systems and would like to manage product lifecycles in Arena Solutions and use Acumatica ERP for managing financial information related to manufacturing.

General Steps for Establishing the Connection and Performing the Initial Configuration

In order to connect the Acumatica ERP instance to Arena Solutions, you perform the following general steps:

1. You prepare an Arena Solutions tenant.
2. You prepare an Acumatica ERP instance.
3. You perform the initial synchronization of data between Acumatica ERP and Arena Solutions.

Each of these general steps is described in more detail in the following sections.

Arena Solutions Preparation

You should make sure that the following actions have been done in Arena Solutions before you set up integration with Acumatica ERP:

1. If you do not have access to Arena Solutions, you request a demo instance.
2. Sign in to Arena Solutions, you open the workspace and copy the workspace ID in the URL of your instance. You will need the ID later when setting up connection in Acumatica ERP.
3. You do the following in the Arena Solutions workspace:
   a. You specify workspace settings in the **Summary > Settings** view.
   b. You create users in the **Users > Access** view.

c. You specify the needed item settings in the **Items** view.

d. You define item attributes in the **Attributes > Items** view.

> These attributes will not be created automatically in Acumatica ERP during data synchronization, so you need to create attributes in both Arena Solutions and in Acumatica ERP. Attribute names must match in both systems.

e. You define the item categories and default attributes in the **Categories > Items** view.

f. Optional: You define units of measure for items in the **Lists > Units of Measure** section.

> If the units of measure were defined in Arena Solutions before you have up integration with Acumatica ERP, you need to create a substitution list on the *Substitution Lists* (SM206026) form to map the units of measure in Arena Solutions to those in Acumatica ERP. If the units of measure were not specified in Arena Solutions, you create them in Arena Solutions with the same names they have as in Acumatica ERP. In this case, you do not need to create a substitution list.

g. Make sure that the items and the engineering bills of material to be imported have been created.

Acumatica ERP Preparation

To prepare an Acumatica ERP instance for integration with Arena Solutions, you need to do the following:

1. You install Acumatica ERP 2026 R1.
2. You download the customization package that provides integration from *Acumatica Community*.
3. You import and publish the customization package.
4. On the *Enable/Disable Features* (CS100000) form, you do the following:
   - Enable the *Arena PLM Integration* feature.
   - Make sure that the *Manufacturing* and *Retail Commerce* features are enabled.
   - Make sure that the *Engineering Change Control* feature is disabled.

   > You can review the feature states after you publish the customization package.
5. Optional: On the *Substitution Lists* (SM206026) form, you create a substitution list for units of measure.

   > You need to create the substitution list for units of measure only if the units of measure were defined in Arena Solutions before you have set up integration with Acumatica ERP and their names differ from those defined in Acumatica ERP.
6. On the *Arena Integration* (BCAR2010) form, you establish the connection between the systems, activate the entities to be synchronized, and specify synchronization settings.
7. On the *Entities* (BC202000) form, you specify filters for entities, such as vendors, stock items, and bills of material. (Filters are conditions according to which the system will include entities in synchronization or exclude them from synchronization.)

   > We recommend that you add the following filters:
   > - For categories to be imported; this filter prevents the import of inactive categories
   > - For vendors; this filter limits the vendors exported to Arena Solutions

8. If any items or bills of material have attributes assigned (such as color or size), on the *Attributes* (CS205000) form, you create the attributes to be used for stock items and bills of material.

   > ⚠ The attribute description in Acumatica ERP must match the attribute label in Arena Solutions.

You can find the detailed instructions for setting up the Acumatica ERP instance in *Initial Configuration: To Set Up Acumatica ERP*.

Initial Data Synchronization

During the initial data synchronization of the systems, you do the following:

1. You sync sales categories to import the categories from Arena Solutions to Acumatica ERP.
2. You sync vendors to export vendors from Acumatica ERP to Arena Solutions.
3. You sync stock items, bills of material, and vendor details to import the data from Arena Solutions to Acumatica ERP.

For detailed instructions, see *Initial Configuration: To Initially Sync Data*.

Initial Configuration: To Set Up Acumatica ERP

In the following implementation activity, you will learn how to prepare an Acumatica ERP instance for integration with Arena Solutions. You can use any tenant of Acumatica ERP with manufacturing functionality configured, or you can install the *SalesDemo* dataset, in which manufacturing functionality is preconfigured.

> ⚠ Before you start setting up an Acumatica ERP instance, you should obtain access to Arena Solutions, copy the workspace ID, and configure all required entities that will be synced.

Story

Suppose that you are an implementation consultant who needs to prepare an Acumatica ERP instance for integration with Arena Solutions. You will establish the connection between the systems, specify integration settings, and specify filters for the entities that will be synced between the systems—in this example, vendors, stock items, and bills of material (BOMs).

Suppose that based on the business processes of your organization, you need to configure Acumatica ERP so that it does the following:

- Creates sales categories that exist in Arena Solutions but are absent in Acumatica ERP
- If a supplier (vendor) in Arena Solutions specified in the settings of an item does not exist in Acumatica ERP, uses a specific default vendor
- Automatically creates a stock item for a new item revision in Arena Solutions
- Copies operations and materials from the previous revision of a bill of material to a new revision
- Copies materials from an engineering BOM (added in Arena Solutions) to a BOM in Acumatica ERP
- Assigns the *Inactive* status to items that are marked as deprecated or obsolete in Arena Solutions

You will also specify the default operation number and work center for new bills of material that are created in Acumatica ERP during data synchronization.

Also, suppose that you need to include in data synchronization only vendors assigned to a particular vendor class and stock items with an effective date starting from a particular date; you also need to exclude a particular bill of material from data synchronization.

Process Overview

In this activity, you will establish the connection with Arena Solutions, activate the entities that will be synced between the systems, and specify the needed integration settings by using the *Arena Integration* (BCAR2010) form. Then you will create filters for the vendor class and stock item to be included in the data sync and a filter for the bill of material to be excluded from data sync by using the *Entities* (BC202000) form.

System Preparation

Before you start preparing the system to integration with Arena Solutions, do the following:

1. Download, import, and publish the customization package that provides the integration from *Acumatica Community*.
2. On the *Enable/Disable Features* (CS100000) form, make sure that the *Manufacturing* and *Retail Commerce* features are enabled.
3. Optional:On the *Substitution Lists* (SM206026) form, create a substitution list for units of measure.

Step 1: Establishing the Connection

To establish the connection between Acumatica ERP and Arena Solutions, do the following:

1. Open the *Arena Integration* (BCAR2010) form.
2. In the Summary area, do the following:
   a. In the **Tenant Name** box, type the URL of your Arena Solutions tenant.
   b. Make sure that the **Active** and **Default** check boxes are selected.
3. On the **Connection Settings** tab, specify the following:
   - **Email**: The email you use to sign in to the Arena Solutions tenant
   - **Password**: The password you use to sign in to the Arena Solutions tenant
   - **Workspace ID**: The identifier of the Arena Solutions workspace, which you copied from the workspace URL
4. On the form toolbar, click **Save**.
5. On the form toolbar, click **Test Connection**. Make sure that the connection has been established successfully.

Step 2: Activating Entities

To activate the entities that will be synced, do the following while you are still viewing the *Arena Integration* (BCAR2010) form:

1. On the **Entity Settings** tab, select the check boxes in the **Active** column for each row.
2. Optional: In the **Max. Number of Failed Attempts** column, change the number of failed attempts the system will make to synchronize the entity before it stops.
3. On the form toolbar, click **Save**.

Step 3: Specifying Integration Settings

To specify integration settings, while you are still viewing the *Arena Integration* (BCAR2010) form, do the following:

1. In the **Sync Settings** section of the **Other** tab, specify the following settings:

- **Action for Invalid Category**: *Create on fly*
- **Action for Invalid Supplier**: *Use Default Supplier*
- **Vendor**: A vendor created in Acumatica ERP that the system will use as the default vendor
- **Create Item for New Revision**: Selected
- **Delimiter**: The delimiter that will be used by the system to add a revision number to the inventory ID of each new item created for a new item revision
- **Copy Data of Latest BOM Revision to New BOM Revision**: Selected
- **Create Operation and Copy EBOM Materials**: Selected

2. In the **Default Settings** section, specify the following settings:
   - **BOM Operation ID**: The default operation number that the system will use to create a bill of material routing in Acumatica ERP
   - **BOM Work Center**: The default work center that the system will use to create a bill of material routing in Acumatica ERP
   - **Default Item Class**: The default item class that the system will use to create an item in Acumatica ERP
   - **Status of Deprecated Item**: *Inactive*
   - **Status of Obsolete Item**: *Inactive*
3. In the **Arena PLM Item Classes** section, do the following:
   a. Add rows to the table for the sales categories imported into Acumatica ERP from Arena Solutions that will be used in data synchronization.
   b. If you want to assign a particular item class to a sales category, in the **Item Class ID** column, select the item class. The system will use this item class when it is creating items in Acumatica ERP during data synchronization if the sales category is assigned to the item in Arena Solutions.
   c. If you want to assign a particular work center to a sales category, in the **Work Center ID** column, select the work center. The system will use this work center when it is adding operations to a BOM in Acumatica ERP during data synchronization if material items of the operation have the sales category assigned in Arena Solutions—

Step 4: Adding Filters for Entities

To add filters for a vendor class, stock item, and bill of material, do the following:

1. Open the *Entities* (BC202000) form.
2. Add a filter for the vendor class as follows:
   a. In the **Entity** box of the Summary area, select *Vendor*.
   b. On the **Export Filtering** tab, click **Add Row** on the table toolbar.
   c. In the row, specify the following:
      - **Active**: Selected
      - **Field Name**: *Vendor Class*
      - **Condition**: *Equals*
      - **Value**: The vendor class in Acumatica ERP whose vendors you want to export in the integration
   d. On the form toolbar, click **Save**.
3. Add a filter for the stock items to be included in data synchronization as follows:
   a. In the **Entity** box of the Summary area, select *Stock Item*.
   b. On the **Import Filtering** tab, click **Add Row** on the table toolbar.
   c. In the row, specify the following:
      - **Active**: Selected

- **Field Name**: *EffectiveDateTime*
- **Condition**: *Is Greater Than*
- **Value**: The starting effective date in the *dd/mm/yy hh:mm:ss AM* format

d. On the form toolbar, click **Save**.

4. Add a filter for the bill of material to be excluded from data synchronization as follows:
   a. In the **Entity** box of the Summary area, select *Bill of Material*.
   b. On the **Import Filtering** tab, click **Add Row** on the table toolbar.
   c. In the row, specify the following:
      - **Active**: Selected
      - **Field Name**: *Name*
      - **Condition**: *Does Not Equal*
      - **Value**: The name of the bill of material
   d. On the form toolbar, click **Save**.

You have successfully prepared Acumatica ERP for integration with Arena Solutions. Now you can perform initial data synchronization.

Initial Configuration: To Initially Sync Data

In the following implementation activity, you will learn how to initially sync data between Acumatica ERP and Arena Solutions.

Story

Suppose that you are an implementation consultant who needs to integrate Acumatica ERP with Arena Solutions. Further suppose that you have already established the connection between the systems and specified the synchronization settings; now you need to initially synchronize the data between the systems.

Process Overview

In this activity, you will perform the following steps:

1. On the *Prepare Data* (BC501000) form, prepare the sales category data for import.
2. On the *Process Data* (BC501500) form, import the prepared sales category data.
3. On the *Prepare Data* form, prepare the vendor data for export.
4. On the *Process Data* form, export the prepared vendor data.
5. On the *Prepare Data* form, prepare the stock item, bill of material, and vendor detail data for import.
6. On the *Process Data* form, import the prepared stock item, bill of material, and vendor detail data.
7. On the *Sync History* (BC301000) form, review the synchronized data.

System Preparation

As a prerequisite activity, in the company to which you are signed in, make sure you have set up your Acumatica ERP instance for integration with Arena Solutions, as described in *Initial Configuration: To Set Up Acumatica ERP*.

Step 1: Preparing the Sales Category Data for Import

To prepare the sales category data for import, do the following:

1. Open the *Prepare Data* (BC501000) form.
2. In the **Tenant** box of the Selection area, make sure that your Arena Solutions tenant is selected.
3. In the **Entity** box, select *Sales Category*.
4. In the **Prepare Mode** box, select *Full*.
5. Clear the **Start Date** box to prepare all records, regardless of the date of the changes.
6. In the **Sync Direction** column, notice that *Import* is specified. This means that sales categories will be imported from Arena Solutions to Acumatica ERP.
7. In the row with the *Sales Category* entity, select the **Selected** check box, and on the form toolbar, click **Prepare**.
8. In the **Processing** dialog box, which opens, review the results of the processing, and click **Close** to close the dialog box.

   Notice that the **Prepared Records** column shows the number of records that have been prepared and are ready to be processed.

Step 2: Importing the Prepared Sales Category Data

To import the sales category data that you have prepared, do the following:

1. While you are still viewing the *Prepare Data* (BC501000) form, in the row with the *Sales Category* entity, click the link in the **Prepared Records** column.

   The *Process Data* (BC501500) form opens with the Arena Solutions tenant and the *Sales Category* entity selected in the Selection area. The table displays all synchronization records of the *Sales Category* entity, which you prepared in Step 1.
2. On the form toolbar, click **Process All** to import all records displayed in the table.
3. In the **Processing** dialog box, which opens, review the results of the processing, and click **Close** to close the dialog box.

Step 3: Preparing the Vendor Data for Export

To prepare the vendor data for export, do the following:

1. Open the *Prepare Data* (BC501000) form.
2. In the **Tenant** box of the Selection area, make sure that your Arena Solutions tenant is selected.
3. In the **Entity** box, select *Vendor*.
4. In the **Prepare Mode** box, select *Full*.
5. Clear the **Start Date** box.
6. In the **Sync Direction** column, notice that *Export* is specified. This means that vendors will be exported from Acumatica ERP to Arena Solutions.
7. In the row with the *Vendor* entity, select the **Selected** check box, and on the form toolbar, click **Prepare**.
8. In the **Processing** dialog box, which opens, review the results of the processing, and click **Close** to close the dialog box.

Notice that the **Prepared Records** column shows the number of records that have been prepared and are ready to be processed.

Step 4: Exporting the Prepared Vendor Data

To export the vendor data that you have prepared, do the following:

1. While you are still viewing the *Prepare Data* (BC501000) form, in the row with the *Vendor* entity, click the link in the **Prepared Records** column.

   The *Process Data* (BC501500) form opens with the Arena Solutions tenant and the *Vendor* entity selected in the Selection area. The table displays all records of the *Vendor* entity that you prepared in Step 3.
2. On the form toolbar, click **Process All** to export all records displayed in the table.
3. In the **Processing** dialog box, which opens, review the results of the processing, and click **Close** to close the dialog box.

Step 5: Preparing the Other Data for Import

To prepare the stock item, bill of material, and vendor detail data for import, do the following:

1. Open the *Prepare Data* (BC501000) form.
2. In the **Tenant** box of the Selection area, make sure that your Arena Solutions tenant is selected.
3. Make sure that the **Entity** box is empty.
4. In the **Prepare Mode** box, select *Full*.
5. Clear the **Start Date** box.
6. In the **Sync Direction** column, notice that *Import* is specified for all entities. This means that the records will be imported from Arena Solutions to Acumatica ERP.
7. In the rows with the *Stock Item*, *Bill of Material*, and *Vendor Details* entities, select the **Selected** check box, and on the form toolbar, click **Prepare**.
8. In the **Processing** dialog box, which opens, review the results of the processing, and click **Close** to close the dialog box.

   Notice that the **Prepared Records** column shows the number of records that have been prepared and are ready to be processed.

Step 8: Importing the Other Prepared Data

To import the stock item, bill of material, and vendor detail data you have prepared, do the following:

1. Open the *Process Data* (BC501500) form.
2. Make sure that the Arena Solutions tenant is selected in the **Tenant** box.
3. Make sure that the table displays all records that you prepared in Step 7.
4. On the form toolbar, click **Process All** to import all records displayed in the table.
5. In the **Processing** dialog box, which opens, review the results of the processing, and click **Close** to close the dialog box.

Step 9: Reviewing the Synchronization Results

To review the results of the synchronization, do the following:

1. Open the *Sync History* (BC301000) form.

2. In the Summary area of the form, specify the following settings:
   - **Store**: The Arena Solutions tenant with which you are synchronizing data
   - **Entity**: *Empty*
3. Open the **Synchronized** tab.

   The tab shows the items that have been synchronized with the Arena Solutions tenant. In the **Local ID** column, the identifiers of the entities in Acumatica ERP are displayed. The **Last Operation** column displays either *Inserted Locally* (for the entities with the *Import* sync direction) or *Inserted Externally* (for the *Vendor* entity records, which have the *Export* sync direction). The time stamp in the **Last Attempt** column shows the date and time when you ran data processing on the *Process Data* (BC501500) form for the entities.

You have successfully performed the initial synchronization of data between Acumatica ERP and Arena Solutions.

Importing Items

When integration with Arena Solutions is implemented, the items that are used in manufacturing—both finished goods and components—are managed only in Arena Solutions and imported into Acumatica ERP during data synchronization.

In this chapter, you will find information about the synchronization of item data.

Item Import: General Information

If you have integrated Acumatica ERP with Arena Solutions, you manage items in Arena Solutions. To make the changes available in Acumatica ERP, you need to import the items, as described in this topic.

Learning Objectives

In this topic, you will learn how to import items into Acumatica ERP that have been created or changed in Arena Solutions.

Applicable Scenarios

You import items into Acumatica ERP in the following cases:

- When you have created any items in Arena Solutions and would like to process manufacturing documents containing the items in Acumatica ERP
- When you have changed item settings in Arena Solutions and would like to make these changes available in Acumatica ERP

Creation of an Item in Arena Solutions

When you create an item in Arena Solutions, you need to do the following to make the item ready to be imported into Acumatica ERP:

1. You create the item.
2. You create an engineering bill of material for the item.
3. You release the item to design.
4. You release the item to production.

You can import into Acumatica ERP only items that have been released to production in Arena Solutions.

Item Import

In Acumatica ERP, you do the following to import new items and changes in the existing items from Arena Solutions:

1. On the *Prepare Data* (BC501000) form, you prepare the *Stock Item* and *Bill of Material* entities for import.

We recommend that you select the *Incremental* prepare mode so that the systems syncs only entities with changed data. This will decrease the synchronization time.

2. On the *Process Data* (BC501500) form, you import the prepared records.

   > ⚠
   > - If any filters have been created for the entities on the *Entities* (BC202000) form, the system will process the entities according the filter conditions.
   > - If any records are processed unsuccessfully, the system marks these entities as failed. You can investigate these records and reprocess them later.

3. Optional: On the *Sync History* (BC301000) form, you view the imported records.
4. On the *Stock Items* (IN202500) form, you open each of the imported or changed stock items and specify additional settings, if needed.
5. On the *Bill of Material* (AM208000) form, you open each of the imported bills of material and reconcile them, as described in *Import of Bills of Material: General Information*.

Item Import: Synchronization Details

You create and manage the stock items used in manufacturing (finished goods and components) in Arena Solutions, and then you import the items into Acumatica ERP during data synchronization. In this topic, you will find information about the synchronization of item records between Arena Solutions and Acumatica ERP.

Item Revisions in Arena Solutions

Arena Solutions supports item revisions; that is, if the item settings have to be changed significantly, an engineer can create a new item revision. Because item revisions are not supported in Acumatica ERP, the identifier of the item revision imported from Arena Solutions is displayed in the **PLM Revision ID** box on the **Manufacturing** tab of the *Stock Items* (IN202500) form and is unavailable for editing.

When you are importing item data from Arena Solutions, for a new item revision, the system either creates a new item to represent the revision or updates the settings of the existing item being revised, depending on the state of the **Create Item for New Revision** check box on the **Other** tab of the *Arena Integration* (BCAR2010) form.

> ⓘ
> If you want each item revision to be managed separately in Acumatica ERP, you should select the **Create Item for New Revision** check box so that the system creates an item for each revision.

Item Synchronization

Only items that are in production in Arena Solutions can be imported into Acumatica ERP. When you start importing item data by using the *Process Data* (BC501500) form, the system syncs the data as follows:

- If an item does not exist in Acumatica ERP, the system will create the item on the *Stock Items* (IN202500) form.
- If the shared settings of the current item revision have been changed in Arena Solutions, the system updates the changed item settings.
- If a new item revision has been added in Arena Solutions, the system behaves as follows, depending on the state of the **Create Item for New Revision** check box on the **Other** tab of the *Arena Integration* (BCAR2010) form:
  - If the check box is selected, the system creates a stock item for the new revision. The system will append the revision number to the inventory ID of the item to make it unique by using the character specified in the **Delimiter** box on the *Arena Integration* form.
  - If the check box is cleared, the system will update the shared settings of the existing item.

- If the status of the item has been changed to *Obsolete* in Arena Solutions since the last sync, the system will change the status of the stock item in Acumatica ERP to the value specified in the **Status of Obsolete Item** box of the **Other** tab on the *Arena Integration* form.
- If the status of the item has been changed to *Deprecated* in Arena Solutions since the last sync, the system will change the status of the stock item to the value specified in the **Status of Deprecated Item** box of the **Other** tab on the *Arena Integration* form.

Item Mapping

The following table shows the mapping of Acumatica ERP elements to Arena Solutions elements that is used during the import of item data from Arena Solutions. In Arena Solutions, you can find item settings in the **Item** world. In Acumatica ERP, you can find the item settings on the *Stock Items* (IN202500) form.

Table: Item Mapping

Arena Solutions Element Name	Acumatica ERP Element Name
Item Name	**Inventory ID** box (Summary area)
Description	**Description** box (Summary area)
Revision	**Revision ID** box (**Manufacturing** tab)
Unit of Measure	**Base Unit** box (**General Settings** tab)
Owner	**Product Manager** box (Summary area)
Additional Attributes	**Attributes** table (**Attributes** tab)

If items have attributes assigned and you would like to import changes in attributes from Arena Solutions, you must first ensure that the attribute **Label** in Arena Solutions must match the attribute **Description** in Acumatica ERP for successful data synchronization.

Importing Bills of Material

When integration with Arena Solutions is implemented, engineering bills of material (and their settings, such as the list of materials and the quantities required to produce a finished item) are managed in Arena Solutions and imported into Acumatica ERP during data synchronization.

In this chapter, you will find information about the synchronization of bill of material data.

Import of Bills of Material: General Information

If you have integrated Acumatica ERP with Arena Solutions, you create and manage engineering bills of material (EBOMs) in Arena Solutions. To make the changes to EBOMs available in Acumatica ERP, you need to import the EBOMs and reconcile them, as described in this topic.

Learning Objectives

In this chapter, you will learn how to do the following:

- Import engineering bills of material data from Arena Solutions into Acumatica ERP
- Reconcile bills of material in Acumatica ERP

Applicable Scenarios

You import bills of material from Arena Solutions in the following cases:

- When you have created any number of engineering bills of material in Arena Solutions and would like to make them available in Acumatica ERP
- When you have made changes to any engineering bills of material in Arena Solutions and would like to make the changes available in Acumatica ERP

Settings that Affect the Import of Bills of Material

You can configure the system to import bills of material from Arena Solutions to your specifications by specifying the synchronization settings on the **Other** tab of the *Arena Integration* (BCAR2010) form. You can make the system do the following during the import of BOMs into Acumatica ERP:

- Copy operations and materials from the previous revision of a bill of material in Acumatica ERP: You select the **Copy Data of Latest BOM Revision to New BOM Revision** check box.
- Copy materials from an EBOM to an operation: You select the **Create Operation and Copy EBOM Materials** check box.
- Add an operation with the specified number to a BOM: You specify the operation number in the **BOM Operation ID** box.

  You must specify the default operation if either (or both) of the **Copy Data of Latest BOM Revision to New BOM Revision** or **Create Operation and Copy EBOM Materials** check boxes are selected.

- Add a specific work center to an operation: You specify the work center in the **BOM Work Center** box.

> ⚠ You must specify the default work center if either (or both) of the **Copy Data of Latest BOM Revision to New BOM Revision** or **Create Operation and Copy EBOM Materials** check boxes are selected.

Creation of an EBOM Revision in Arena Solutions

When you create an engineering bill of material in Arena Solutions, you do the following to make it available to be imported into Acumatica ERP:

1. You create the EBOM (technically, you create the first revision of the EBOM).
2. You add all needed components to the EBOM.
3. You make the revision of the EBOM effective.

When you have made changes to an existing EBOM, you make the revision a working revision, make the required changes, and make the revision effective.

Import of Engineering Bills of Material

You import new and changed engineering bills of material into Acumatica ERP as follows:

1. On the *Prepare Data* (BC501000) form, you prepare the *Bill of Material* entity for import.

   > ⓘ We recommend that you select the *Incremental* prepare mode so that the systems syncs only entities with changed data. This will decrease the synchronization time.

2. On the *Process Data* (BC501500) form, you import the prepared records.

   > ⚠
   > - If any filters have been created for the entities on the *Entities* (BC202000) form, the system will process the entities according the filter conditions.
   > - If any records are processed unsuccessfully, the system marks these entities as failed. You can investigate these records and reprocess them later.

3. Optional: On the *Sync History* (BC301000) form, you view the imported records.

Then you need to reconcile the imported bills of material.

Reconciliation of Bills of Material

When you have imported the bills of material, you need to reconcile them on the *Bill of Material* (AM208000) form as follows:

1. On the **Engineering BOM** tab, you view the list of materials in the engineering BOM. The **Unreconciled Qty.** column shows the quantity of the material that you must add to a BOM operation.
2. On the **Operations** tab, make sure that all necessary operations are displayed. If not, you can do any of the following:
   - If this is a new bill of material, you click **Copy from EBOM** on the table toolbar to make the system add the operation specified in the **BOM Operation ID** box on the **Other** tab of the *Arena Integration* (BCAR2010) form and copy materials from the engineering BOM to the list of materials for this operation.
   - If this is a new revision of an existing bill of material, you click **Create from Last Revision** on the form toolbar to make the system copy operations and materials from the previous BOM revision.
   - You add the operation or operations manually.
3. You review and correct the list of materials for each operation as follows:

a. You click the operation on the **Operations** tab.

b. On the **Materials** tab, you review the list of materials and correct the quantities, if required. You can remove or add materials. The total quantity of the material in all operations must be equal to the quantity specified in the **Unreconciled Qty.** column of the **Engineering BOM** tab.

> ⚠ You can add only materials listed on the **Engineering BOM** tab.

c. On the other tabs of the Operation Details area, review or add the required information, such as steps or tools.

4. On the **Engineering BOM** tab, you make sure that the **Unreconciled Qty.** column contains zero values for all materials.
5. In the Summary area, you make sure that the **Reconciled** check box is selected.

Import of Bills of Material: Synchronization Details

You create and manage the engineering bills of material in Arena Solutions, and then you import the settings of the engineering bills of material into Acumatica ERP during data synchronization. These settings are applied to a linked bill of material used for producing items. In this topic, you will find information about the synchronization of bill of material (BOM) records between Arena Solutions and Acumatica ERP.

BOM Data Ownership

When Acumatica ERP is integrated with Arena Solutions, you manage the following in engineering bills of material in Arena Solutions and then import them into Acumatica ERP:

- The list of materials (stock items) used to produce the finished good
- The quantity of each material required for the production of the finished good
- Reference designators

In Acumatica ERP, you specify the following additional settings of bills of material:

- Operations and their settings
- Work centers
- Steps
- Tools
- Overhead costs
- Outside processing information

> ⚠ Only engineering bills of material that have been made effective in Arena Solutions can be synced with Acumatica ERP.

BOM Synchronization Specifications

When you start importing BOM data by using the *Process Data* (BC501500) form, the system syncs the data as follows:

- If the imported item with the specified engineering BOM does not have a default BOM ID specified on the **Manufacturing** tab of the *Stock Items* (IN202500) form, then the system does the following during synchronization:
  - Creates a bill of material with the settings copied from the engineering BOM on the *Bill of Material* (AM208000) form. (The bill of material is assigned the *On Hold* status.)

    - If the default operation number and work center are specified on the *Arena Integration* (BCAR2010) form, adds these values to the bill of material.
    - Creates material transactions for all the material items on the *Materials* (AM300000) form.
- If the imported item with the specified engineering BOM has a default BOM ID specified on the **Manufacturing** tab of the *Stock Items* form, then the system does the following during synchronization:
    - If the engineering BOM revision has been changed in Arena Solutions, creates the BOM revision by coping the settings of the current BOM revision and then makes changes to the list of materials according to the changes made in the engineering BOM.
    - If the BOM revision has not been changed in Arena Solutions, makes changes to the list of materials in the current BOM revision based on the changes made in the engineering BOM.

BOM Mapping

The following table shows the mapping of Acumatica ERP elements to Arena Solutions elements that is used during the import of bill of material data from Arena Solutions. In Arena Solutions, you can find BOM settings in the **Bill of Material** view of the **Item** world. In Acumatica ERP, you can find the engineering BOM settings on the **Engineering BOM** tab of the *Bill of Material* (AM208000) form.

Table: BOM Mapping

Arena Solutions Element Name	Acumatica ERP Column Name
Item Name	**Inventory ID**
Revision	**PLM Item Revision**
Quantity	**Quantity**
Reference Designators	**Reference Designator(s)**
Notes	**Notes**

Exporting Vendors

When integration with Arena Solutions is implemented, vendors are managed in Acumatica ERP and exported to Arena Solutions during data synchronization.

In this chapter, you will find information about the synchronization of vendor data.

Vendor Export: General Information

If you have integrated Acumatica ERP with Arena Solutions, you create vendors in Acumatica ERP and then export them to Arena Solutions, as described in this topic.

Learning Objectives

In this chapter, you will learn how to export vendors created in Acumatica ERP to Arena Solutions.

Applicable Scenarios

You export vendors to Arena Solutions when you have created any number of vendors in Acumatica ERP and would like to specify the new vendor in item settings in Arena Solutions.

Export of Vendors from Acumatica ERP

When you have created any number of vendors on the *Vendors* (AP303000) form of Acumatica ERP and would like to export the vendors to Arena Solutions, you do the following in Acumatica ERP:

1. On the *Entities* (BC202000) form, you make sure that the new vendor appears in the list of records for export.
2. On the *Prepare Data* (BC501000) form, you prepare the *Vendor* entity for export.

   We recommend that you select the *Incremental* prepare mode so that the systems syncs only entities with changed data. This will decrease the synchronization time.

3. On the *Process Data* (BC501500) form, you export the prepared records.

   - If any filters have been created for the entities on the *Entities* (BC202000) form, the system will process the entities according the filter conditions.
   - If any records are processed unsuccessfully, the system marks these entities as failed. You can investigate these records and reprocess them later.

4. Optional: On the *Sync History* (BC301000) form, you view the exported records.

When you export changes made for an existing vendor, be aware that contact data, such as address and phone number, will not be updated due to the limitations of the Arena Solutions API. You will need to make these changes manually in Arena Solutions.

Specification of the Exported Vendor in Item Settings in Arena Solutions

When you have exported a vendor to Arena Solutions, you can add the vendor (or supplier) to the settings of an item. You do the following in Arena Solutions:

1. You make sure that the imported vendor has appeared in the list of suppliers.

2. You specify the exported vendor in the item settings.
3. You enter the other supplier-related details, such as number, name, type, description, UOM, and procurement type.

Vendor Export: Synchronization Details

You create and manage the vendors that supply items for manufacturing in Acumatica ERP and then you export the vendors to Arena Solutions during data synchronization. In this topic, you will find information about the synchronization of vendor records between Arena Solutions and Acumatica ERP.

Vendor Synchronization Specifications

When you select the *Incremental* prepare mode on the *Prepare Data* (BC501000) form, the system exports vendor data if the following changes have occurred on the *Vendors* (AP303000) form:

- A new vendor is added
- The account name of the vendor is updated in the **Account Name** box on the **General** tab
- Primary contact data is added to the **Primary Contact** section of the **General** tab

When you export changes made for an existing vendor, be aware that contact data, such as address and phone number, are not updated due to limitation of the Arena Solutions API. You will need to make these changes manually in Arena Solutions.

Vendor Mapping

The following table shows the mapping of Acumatica ERP elements to Arena Solutions elements that is used during the export of vendor data to Arena Solutions. In Arena Solutions, you can find these supplier settings in the **Suppliers** world. In Acumatica ERP, you can find vendor settings on the *Vendors* (AP303000) form.

Table: Vendor Mapping

Acumatica ERP Element Name	Arena Solutions Element Name
Vendor ID box (Summary area)	**Company Name** box (**Profile** view)
Account Name box (**General** tab)	**Description** box (**Profile** view)
Account Address section (**General** tab)	**Addresses** table (**Profile** view)
Phones in the **Additional Account Info** section (**General** tab)	**Phone Numbers** table (**Profile** view)
Primary Contact section (**General** tab)	**Supplier Contacts** table (**Contacts** view)

Importing Vendor Details of Items

When integration with Arena Solutions is implemented, the vendor details of stock items are managed only in Arena Solutions and imported into Acumatica ERP during data synchronization.

In this chapter, you will find information about the synchronization of data with vendor details of stock items.

Import of Vendor Details of Items: General Information

If you have integrated Acumatica ERP with Arena Solutions, you manage the vendor details of stock items in Arena Solutions. To make the changes to vendor details of items available in Acumatica ERP, you need to import the details, as described in this topic.

Learning Objectives

In this chapter, you will learn how to import vendor details of an item in Arena Solutions.

Applicable Scenarios

You import vendor details of an item that have been changed in Arena Solutions when you want to update the vendor details in Acumatica ERP.

Settings that Affect the Import of Vendor Details

Because the vendors involved in manufacturing are managed in Acumatica ERP, there may be a situation when a vendor specified in the settings of an item in Arena Solutions does not exist in Acumatica ERP. On the **Other** tab of the *Arena Integration* (BCAR2010) form, you set up the default system behavior to be used during import when the settings of an item contain a vendor that does not exist in Acumatica ERP:

- If you want the system to display an error message, you select *Display an Error and Stop Sync* in the **Action for Invalid Supplier** box.
- If you want the system to use a specific vendor to replace the vendor that does not exist in the item settings, you select *Use Default Supplier* in the **Action for Invalid Supplier**, box and select the vendor in the **Vendor** box.

Update of Vendor Details in Arena Solutions

Updating the vendor details in Arena Solutions entails creating new vendors for component items. You update these vendor details as follows:

1. For a component item, you create a new vendor item in the sourcing details.
2. You make sure the vendor item has the *Approved* status.

Import of Vendor Details

You import changes in vendor details for items into Acumatica ERP as follows:

1. On the *Prepare Data* (BC501000) form, you prepare the *Vendor Detail* entity for import.

We recommend that you select the *Incremental* prepare mode so that the systems syncs only entities with changed data. This will decrease the synchronization time.

2. On the *Process Data* (BC501500) form, you import the prepared records.

   > ⚠
   > - If any filters have been created for the entities on the *Entities* (BC202000) form, the system will process the entities according the filter conditions.
   > - If any records are processed unsuccessfully, the system marks these entities as failed. You can investigate these records and reprocess them later.

3. Optional: On the *Sync History* (BC301000) form, you view the imported records.
4. On the *Stock Items* (IN202500) form, you open each stock item whose vendor details have been updated.
5. On the **Vendor Details** tab, you make sure that the row for the vendor has appeared in the table and the **Approved** check box is selected in the row.

Import of Vendor Details of Items: Synchronization Details

Although you manage vendors in Acumatica ERP and export them to Arena Solutions, the details about the vendors that supply a particular stock item are specified in Arena Solutions and then imported into Acumatica ERP during data synchronization. In this topic, you will find information about the synchronization of the vendor details of stock items between Arena Solutions and Acumatica ERP.

Synchronization Specifications for Vendor Details of Items

When you are importing the vendor details of stock items from Arena Solutions into Acumatica ERP, the system does the following:

- When a vendor is added to the list of approved item suppliers in Arena Solutions, adds a new row to the **Vendor Details** tab of the *Stock Items* (IN202500) form and selects the **Approved** check box.
- If a vendor added as the approved item supplier does not exist in Acumatica ERP, behaves as follows:
  - Displays an error message if *Display an Error and Stop Sync* is selected in the **Action for Invalid Supplier** box on the **Other** tab of the *Arena Integration* (BCAR2010) form.
  - Adds a row to the **Vendor Details** tab for the vendor specified in the **Vendor** box on the **Other** tab of the *Arena Integration* form if *Use Default Supplier* is selected in the **Action for Invalid Supplier** box.
- When a vendor is removed from the list of approved item suppliers in Arena Solutions, clears the **Approved** check box.

Mapping of Vendor Detail Data

The following table shows the mapping of Acumatica ERP elements to Arena Solutions elements that is used during the import of vendor detail data from Arena Solutions. In Arena Solutions, you can find these vendor details in the **Sourcing** view of the **Item** world. In Acumatica ERP, you can find the vendor details on the **Vendor Details** tab of the *Stock Items* (IN202500) form.

> ⚠ The **Split** and **Rank** values are not imported because these settings are not supported in Acumatica ERP.

Table: Vendor Details Mapping

Arena Solutions Element Name	Acumatica ERP Element Name
Item Name	**Inventory ID** box (Summary area)
Vendor	**Vendor ID** column (**Vendor Details** tab)

Arena Solutions Element Name	Acumatica ERP Element Name
Approved status	**Approved** check box (**Vendor Details** tab)

Importing Sales Categories

When integration with Arena Solutions is implemented, sales categories for items used in manufacturing are managed only in Arena Solutions and are imported to Acumatica ERP during data synchronization.

In this chapter, you will find information about the synchronization of sales category data.

Import of Sales Categories: General Information

If you have integrated Acumatica ERP with Arena Solutions, you manage the item categories (referred to as *sales categories* in Acumatica ERP) specified in stock item settings in Arena Solutions. To make the changes to the list of categories available in Acumatica ERP, you need to import them, as described in this topic.

Learning Objectives

In this chapter, you will learn how to import sales categories from Arena Solutions.

Applicable Scenarios

You import changes to the list of item categories made in Arena Solutions when you what to update the sales categories in the item settings in Acumatica ERP.

Settings that Affect the Import of Sales Categories

During the synchronization of the sales categories that are specified in item settings in Arena Solutions, a sales category that does not exist in Acumatica ERP may be specified for an item. On the **Other** tab of the *Arena Integration* (BCAR2010) form, you set up the default system behavior to be used during import when the settings of an item contain a sales category that does not exist in Acumatica ERP as follows:

- If you want the system to display an error message, you select *Display an Error and Stop Sync* in the **Action for Invalid Category** box.
- If you want the system to create the sales category on the *Item Sales Categories* (IN204060) form, you select *Create on fly* in the **Action for Invalid Category** box.

Creation of a Category in Arena Solutions

When you create category in Arena Solutions, you need to do the following in the **Categories** view of the **Workspace Settings** page to make the category ready to be imported into Acumatica ERP:

1. You create the category and specify its place in the hierarchy.
2. You activate the category.

Only active categories can be imported into Acumatica ERP.

Import of Sales Categories

In Acumatica ERP, you do the following to import new categories from Arena Solutions:

1. On the *Prepare Data* (BC501000) form, you prepare the *Sales Category* entity for import.

> We recommend that you select the *Incremental* prepare mode so that the systems syncs only entities with changed data. This will decrease the synchronization time.

2. On the *Process Data* (BC501500) form, you import the prepared records.

> - If any filters have been created for the entities on the *Entities* (BC202000) form, the system will process the entities according the filter conditions.
> - If any records are processed unsuccessfully, the system marks these entities as failed. You can investigate these records and reprocess them later.

3. Optional:On the *Sync History* (BC301000) form, you view the imported records.
4. On the *Item Sales Categories* (IN204060) form, you view the imported sales categories.
5. In the **Sales Categories** table of the **Attributes** tab on the *Stock Items* (IN202500) form, you specify the imported sales categories for the needed items.

Import of Sales Categories: Synchronization Details

You create and manage the categories used for stock items in Arena Solutions, and then you import the categories into Acumatica ERP during data synchronization. In this topic, you will find information about the synchronization of sales category records between Arena Solutions and Acumatica ERP.

Synchronization Specifications for Sales Categories of Items

When you start importing sales categories by using the *Process Data* (BC501500) form, the system syncs the data as follows:

- Only active categories are imported.
- If a category does not exist in Acumatica ERP, the system does the following:
  - Displays an error message if *Display an Error and Stop Sync* is selected in the **Action for Invalid Category** box on the **Other** tab of the *Arena Integration* (BCAR2010) form.
  - Creates the category on the *Item Sales Categories* (IN204060) form if *Create on fly* is selected in the **Action for Invalid Category** box.
- If a category that exists in Acumatica ERP has been deactivated in Arena Solutions, it will be removed from the *Item Sales Categories* (IN204060) form.

Mapping of Sales Categories

The following table shows the mapping of Acumatica ERP elements to Arena Solutions elements that is used during the import of category data from Arena Solutions. In Arena Solutions, you can find categories in the **Categories** view of the **Workspace Settings** page. In Acumatica ERP, you can find the sales categories on the *Item Sales Categories* (IN204060) form.

Table: Sales Category Mapping

Arena Solutions Element Name	Acumatica ERP Element Name
Name box	**Description** box
Parent box	**Parent Category** box

Arena Solutions Integration: Form Reference

The topics in this section describe the UI elements on forms that are specific to integration with Arena Solutions.

Arena Integration

Form ID: (BCAR2010)

You use this form to set up connection to Arena Solutions, specify settings for the synchronization of entities, and specify general settings for the integration.

This form is available only if the *Retail Commerce* and *Arena PLM Integration* features are enabled on the *Enable/Disable Features* (CS100000) form.

Form Toolbar

The form toolbar includes the buttons described below.

Button	Description
Test Connection	Tests the ability to connect to Arena Solutions by using the information specified on the **Connection Settings** tab.

Summary Area

In this area, you specify the basic settings of a particular Arena Solutions tenant, or select a tenant to view and edit its settings.

Element	Description
Connector	A read-only box that contains *Arena*, the name of the connector configured on this form.
Tenant Name	The name of the Arena Solutions tenant to which the connection is being configured. The tenant name is specified when the connection is first configured; you cannot change it later.
Active	A check box that indicates (if selected) that the tenant configuration is active and that the entities activated and configured for this tenant are synchronized between Acumatica ERP and Arena Solutions. For inactive tenants, you can modify the tenant settings on the current form, but entities are not synchronized; you can see the history of the synchronization of entities on the *Sync History* (BC301000) form.

Element	Description
Default	A check box that you select to indicate that this tenant is the default tenant in Acumatica ERP. If multiple tenants have been configured on this form, when you open other integration-related forms, the tenant you have defined as the default is automatically inserted in the **Tenant** box on these forms. The system requires a tenant to be defined as the default tenant. When you are defining the first tenant in the system on this form, this check box is selected automatically. When you define another tenant, this check box is cleared by default; if you select this check box for the tenant being defined, the system clears this check box for the tenant that was previously defined as the default tenant.

Connection Settings Tab

The **Connection Settings** tab includes the path and connection details that are used to connect Acumatica ERP to Arena Solutions.

Table: Tenant Settings Section

Element	Description
Email	The email address that you use to sign in to the Arena Solutions tenant.
Password	The password you use to sign in to the Arena Solutions tenant.
Workspace ID	The identifier of the workspace in the Arena Solutions tenant. You can find the identifier in the URL when the workspace is opened in Arena Solutions.
Workspace Name	A read-only box that displays the name of the workspace in the Arena Solutions.

Entity Settings Tab

The rows of this tab are automatically populated with the entities that can be synchronized between Acumatica ERP and the Arena Solutions tenant. You can activate the entities that you need to synchronize between the systems; you can also view and specify synchronization settings for these entities.

The table toolbar has only standard buttons.

Table: Table Columns

Column	Description
Active	A check box that indicates (if selected) that the entity is synchronized between Acumatica ERP and the Arena Solutions tenant. ⚠ If an entity requires other entities to be synchronized along with this entity, the system also selects the **Active** check box for these related entities when you select this check box.

Column	Description
Entity	The entity that can be synchronized between Acumatica ERP and the Arena Solutions tenant, which is one of the following: • *Stock Item* For information about the synchronization details and the standard mapping of fields, see *Item Import: Synchronization Details*. • *Sales Category* For information about synchronization details and standard mapping of fields, see *Import of Sales Categories: Synchronization Details*. • *Bill of Material* This option is displayed only when the *Manufacturing* feature is enabled on the *Enable/Disable Features* (CS100000) form. For information about synchronization details and standard mapping of fields, see *Import of Bills of Material: Synchronization Details*. • *Vendor* For information about synchronization details and standard mapping of fields, see *Vendor Export: Synchronization Details*. • *Vendor Details* For information about synchronization details and standard mapping of fields, see *Import of Vendor Details of Items: Synchronization Details*. You can click the link with each entity name to open the *Entities* (BC202000) form in a pop-up window and specify the mapping and filtering settings for the entity.
Sync Direction	The direction in which the entity should be synchronized. The direction can be one of the following: • *Export*: Data is exported from Acumatica ERP to the Arena Solutions tenant. • *Import*: Data is imported into Acumatica ERP from the Arena Solutions tenant. The direction of the synchronization for all entities is predefined by the system and cannot be changed. For more information, see *Integrating Acumatica ERP with Arena Solutions: General Information*.
Primary System	The system that is used as the source of data during the synchronization of entities. The primary system can be either of the following: • *Local* (that is, Acumatica ERP) • *External* (that is, Arena Solutions) The primary system is determined based on the **Sync Direction** setting as follows: • For *Export*, *Local* is set to be the primary system and cannot be changed. • For *Import*, *External* is set to be the primary system and cannot be changed.

Column	Description
Real-Time Import	The status of the real-time import for the entity. The status can be one of the following options: • *Stopped*: Real-time synchronization has not been started for the *Import* direction. • *Running*: Real-time synchronization has been started for the *Import* direction. • *Not Supported*: Real-time synchronization cannot be started for the *Import* direction.
Real-Time Export	The status of the real-time export for the entity. The status can be one of the following: • *Stopped*: Real-time synchronization has not been started for the *Export* direction. • *Running*: Real-time synchronization has been started for the *Export* direction. • *Not Supported*: Real-time synchronization cannot be started for the *Export* direction.
Max. Number of Failed Attempts	The maximum number of errors allowed during the import or export of data before the synchronization record is skipped (that is, excluded from further synchronization). By default, the column contains *5*: That is, the system allows 5 failed attempts before excluding the synchronization record from further processing.

Other Tab

On this tab, you specify general settings related to integration with Arena Solutions.

Table: Sync Settings Section

In this section, you can specify data synchronization settings.

Element	Description
Action for Invalid Category	The action that the system performs when a sales category being imported from Arena Solutions does not exist in Acumatica ERP. You can select any of the following options: • *Display an Error and Stop Sync*: The system displays an error message and stops synchronization. • *Create on fly*: The system creates the sales category in Acumatica ERP dynamically.
Action for Invalid Supplier	The action that the system performs when a vendor (referred to as a supplier in Arena Solutions) being imported from Arena Solutions does not exist in Acumatica ERP. You can select any of the following options: • *Display an Error and Stop Sync*: The system displays an error message and stops synchronization. • *Use Default Supplier*: The system uses the default vendor specified in the **Vendor** box.
Vendor	The default vendor the system uses if the *Use Default Supplier* option is selected in the **Action for Invalid Supplier** box.

Element	Description
Create Item for New Revision	A check box that indicates (when selected) that the system will create a stock item during data synchronization if a new item revision was created in Arena Solutions. If the check box is cleared, the system will update the settings of the existing stock item with the revision settings.
Delimiter	The character that the system uses to add an item revision number to the inventory ID to make it unique when creating a stock item for a new item revision. This box is available only when the **Create an Item for New Revision** is selected. You can specify any character as the delimiter; you cannot use a space.
Copy Data of Latest BOM Revision to New BOM Revision	A check box that indicates (if selected) that the system will copy operations and materials from the previous BOM revision (if it exists) to the new BOM revision during data processing on the *Process Data* (BC501500) form. If the check box is cleared, the system will create the BOM revision without copying operations and materials from the previous BOM revision, and a user will have to add the operations and materials manually on the *Bill of Material* (AM208000) form. This element is displayed only if the *Material Requirements Planning* or *Distribution Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.
Create Operation and Copy EBOM Materials	A check box that indicates (if selected) that the system will copy materials from an engineering bill of material (EBOM) in Arena Solutions to the operation of the corresponding bill of material specified in the **BOM Operation ID** box when creating a bill of material during data processing on the *Process Data* form. If the check box is cleared, the system will not copy materials from the EBOM and a user will need to add materials manually on the *Bill of Material* form. This element is displayed only if the *Material Requirements Planning* or *Distribution Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.
UOM Substitution List	The name of the substitution list that has been created for mapping units of measure in Arena Solutions and Acumatica ERP on the *Substitution Lists* (SM206026) form. You need to create a substitution list if the names of units of measure differ in Arena Solutions and Acumatica ERP.

Table: Default Settings Section

In this section, you can specify and view the default settings that the system will use during data synchronization.

Element	Description
BOM Operation ID	The operation identifier that the system will add to all new bills of material created on the *Bill of Material* (AM208000) form during data processing on the *Process Data* (BC501500) form. This element is displayed only if the *Material Requirements Planning* or *Distribution Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.
Default Item Class	The item calls that the system will use when creating stock items during data processing on the *Process Data* (BC501500) form. You cannot create items of the item class in Acumatica ERP; they can be created only in Arena Solutions and imported into Acumatica ERP.

Element	Description
BOM Work Center	The work center that the system will add to the new bill of material created on the *Bill of Material* form during data processing on the *Process Data* form. This element is displayed only if the *Material Requirements Planning* or *Distribution Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.
Status of Deprecated Item	The default status that will be assigned to stock items that were deprecated in Arena Solutions when the system processes data on the *Process Data* (BC501500) form. You can select any of the following options, based on the business processes of your organization: • *Active* • *No Sales* • *No Purchases* • *No Request* • *Inactive* • *Marked for Deletion* For details on status descriptions, see *Stock Items*.
Status of Obsolete Item	The default status that will be assigned to stock items that were defined as obsolete in Arena Solutions when the system processes data on the *Process Data* (BC501500) form. You can select any of the following options, based on the business processes of your organization: • *Active* • *No Sales* • *No Purchases* • *No Request* • *Inactive* • *Marked for Deletion* For details on status descriptions, see *Stock Items*.

Table: Arena PLM Item Classes Section

In the table of this section, you can add and view the sales categories that will be used in the integration. You can also view the item classes and work centers assigned to each sales category and change the assignments if needed. The table toolbar has only standard buttons.

Column	Description
Active	A check box that indicates (if selected) that the sales category is used for data synchronization with Arena Solutions. You can clear this check box to exclude the sales category from the synchronization process.
Sales Category	The sales category that is used in the integration.

Column	Description
Item Class ID	The identifier of the item class that is assigned to the sales category. The system uses the item class when it creates items in Acumatica ERP during data synchronization as follows: If an item imported from Arena Solutions has the category in this row assigned to it, then the system copies the default settings specified for the item class on the *Item Classes* (IN20100) form to the item settings in Acumatica ERP. ⚠ You cannot create items of the item class in Acumatica ERP; they can be created only in Arena Solutions and imported into Acumatica ERP.
Description	The description of the item class, which is copied from the *Item Classes* form.
Work Center ID	The identifier of a work center that is assigned to the sales category. During data synchronization, the system uses the work center when it adds items as materials to an operation of a bill of material as follows: If an EBOM being imported contains a material item with the category assigned, on the *Bill of Material* (AM208000) form, the system adds an operation with the number specified in the **BOM Operation ID** box, adds the material item to the materials list, and specifies the work center assigned to the sales category of the item in the row with the operation. This element is displayed only if the *Material Requirements Planning* or *Distribution Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.
Description	The description of the work center selected in the **Work Center ID** box, which is copied from the *Work Centers* (AM207000) form. This element is displayed only if the *Material Requirements Planning* or *Distribution Requirements Planning* feature is enabled on the *Enable/Disable Features* (CS100000) form.

UI Elements Specific to Integration with Arena Solutions

In this topic, you will find a list of the UI elements added to Acumatica ERP forms in order to support integration with Arena Solutions.

These UI elements are displayed only when the *Arena PLM Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Stock Items (IN202500) Form

On the **Manufacturing** tab, the following section and boxes have been added.

Table: PLM Integration Section

Button	Description
PLM Revision ID	A read-only box with the revision identifier of the stock item in Arena Solutions.
PLM Release Date	A read-only box with the effective date of the stock item in Arena Solutions.

On the **Vendor Details** tab, the following check box has been added to the table.

Table: PLM Integration Section

Button	Description
Approved	A check box that indicates (if selected) that the vendor is regarded as an approved supplier in Arena Solutions. The system selects or clears this check box during data synchronization with Arena Solutions.

Bill of Material (AM208000) Form

On the *Bill of Material* (AM208000) form, multiple UI elements have been added to support integration with Arena Solutions.

Table: Summary Area

Element	Description
PLM Item Revision	A read-only box with the revision identifier of the stock item, which is selected in the **Inventory ID** box, in Arena Solutions.
Reconciled	A check box that indicates (if selected) that the bill of material has been fully reconciled with the engineering bill of material in Arena Solutions. This check box is selected automatically when you add all materials from the engineering bill of material to the bill of material. ⚠ You cannot remove the bill of material from hold until this check box is selected.

Table: Operations Tab

The following buttons have been added to the toolbar of the Operations table.

Button	Description
Copy from EBOM	Copies materials from the engineering bill of material.
Create from Last Revision	Copies operations and materials from the last revision of the bill of material.

Table: Engineering BOM Tab

On this tab, you can view the data copied from the engineering bill of material in Arena Solutions during data synchronization. All information in the table is read-only.

The table toolbar has only standard buttons.

Element	Description
Inventory ID	The identifier of a stock item that represents a material in Arena Solutions.
PLM Item Revision	The item revision in Arena Solutions.
Line Number	The number of the material line in the engineering bill of material.
Quantity	The quantity of the material required for the finished item.

Element	Description
Unreconciled Qty.	The quantity of the material not added to any operations of the bill of material.
Reference Designator(s)	The reference designators assigned to the material in Arena Solutions.
Notes	Any notes that have been added for the material in Arena Solutions.