Acumatica ERP 2022 R2 Release Notes: Fixes and Enhancements

Introduction

In this document, you can find fixes and minor enhancements introduced in Acumatica ERP 2022 R2.

Organization and CRM

AC-139229: If a new activity type was added on the *Activity Types (CR102000)* form, a user could not create an activity of this type on the *Cases (CR306000)* form.

AC-151673: On the *Leads BI (CR3010BI)* form, the **Lead Qualification Time** and **Lead Response Time** columns have been moved after the **Created On** column.

AC-152357: If multiple quotes were created for the opportunity and sent to the customer, the email activity related to the primary quote was only displayed on the **Activities** tab of the *Opportunities (CR304000)* form.

AC-154129: The obsolete *Support Activities (CR3061BI)* form was deleted from the **Support** workspace.

AC-154999: On the *Lead Classes (CR207000)* and *Contact Classes (CR205000)* forms, a user could specify the value in the **Opportunity Stage** box, even if the **Opportunity Class ID** box was empty.

AC-155425: On the *Cases (CR306000)* form, if a user created a case, the **Init. Response** setting on the **Additional Info** tab was not updated until the user refreshed the web page.

AC-165870: On the *Email Activity (CR306015)* form, to determine the default email account, the system proceeds as follows until it finds a value:

1. If the email is specified in the **Default Email Account** box on the *User Profile (SM203010)* form, copies this value.
2. If the email is specified in the **Default Email Account** box on the *Lead Classes (CR207000)*, *Contact Classes (CR205000)*, *Business Account Classes (CR208000)*, or *Opportunity Classes (CR209000)* form, copies this value. For a business account, the system also copies the **Mailing & Printing** settings from the following forms: *Customer Classes (AR201000)*, *Vendor Classes (AP201000)*, and *Business Account Classes (CR208000)*.
3. If the email is specified in the **Default Email Account** box on the *Email Preferences (SM204001)* form, copies this value.

AC-172156: The *Sales Quote (CR604500)* report now contains the contact data similar to the *Sales Order (SO641010)* report.

AC-176921: The *Contacts* screen of the Acumatica mobile app did not contain the **Web** field.

AC-192434: On the side panel for the *Business Accounts (CR3030PL)* form, the set of tabs depends on the type of a selected business account. On the side panel for the *Opportunities (CR3040PL)* form, if no business account has been specified in the currently selected opportunity, the **Contacts** tab is not shown.

AC-197470: On the **Duplicates** tab of *Business Accounts (CR303000)* form, if a user tried to merge a duplicate business account with a business account of the *Customer* type, the system displayed the following error message: *Account '14187' cannot be found in the system. Please verify whether you have proper access rights to this object*.

AC-200299: On the **Details** tab of the *Opportunities (CR304000)* form, if a user imported any line by clicking **Load Records from File**, and selected the *Update Existing* mode, and the line had the same ID as the existing line, but a different warehouse, the system updated the existing line.
Fix Description: The **Warehouse** field is now considered a part of the unique key for the line along with the **Inventory ID** field. If an inventory ID is the same, but warehouses are different, a separate line is added. This behavior is similar to the behavior on the *Sales Orders (SO301000)* form.

AC-200775: If a user selected *Leads/Contacts/Employees* in the **Source** box on the **Summary** tab of the *Mass Emails (CR308000)* form, the system did not allow opening the selected records on the **Leads/Contacts/Employees** tab.

AC-204568: On the *User Roles (SM201005)* form, a user could delete the predefined *Financial Supervisor* user role.

AC-208189: On the *Events (CR306030)* form, if a user clicked **Cancel (Esc)** on the form toolbar, the changes were canceled and the form was closed.

AC-214927: In the Acumatica Portal, if on the *Case Details (SP203010)* form, a user closed the case by clicking the **Close Case** button on the form toolbar, the system opened the list of closed cases on the *Closed Cases (SP204010)* form.

AC-217804: If on the *Numbering Sequences (CS201010)* form, the **Manual Numbering** check fox has been selected for sales orders created on the *Sales Orders (SO301000)* form, and an opportunity or a sales quote is converted to a sales order, a user has to specify a number for the sales order in the **Order Nbr.** box of the **Create Sales Order** dialog box. A similar change has been made for invoices created on the *Invoices (SO303000)* form.

AC-218404: If a user selected the *SendGrid* plugin in the **Email Service Plug-In** box in the Summary area of the *System Email Accounts (SM204002)* form, the system did not support the incoming mail processing by default.

AC-226040: On the *Non-Stock Items (IN202000)* form, if the **Divisible Unit** check boxes were cleared for a non-stock item, and a user added this non-stock item on the **Details** tab of the *Opportunities (CR304000)* form, the user could specify decimal quantity for the non-stock item.

AC-226050: If a user deleted a business account, the system deleted all the leads and contacts associated with the business account and all the activities associated with these leads and contacts.

AC-226160: On the *Bills and Adjustments (AP301000)* form, if a user tried to approve a bill associated with a project, and an approver was specified in a user-defined field on the *Projects (PM301000)* form for the associated project, the system did not add a row with the approver's information on the **Approval Details** tab.

AC-226281: If a case had the *Closed* status, and the resolution time specified in the **Resolution Time** box on the **Additional Info** tab of the *Cases (CR306000)* form, and a user created a custom generic inquiry, the resolution time was displayed incorrectly in the generic inquiry.

AC-232907: If on the generic inquiry form used as a source for a dynamic marketing list a contact was excluded from the list by filtering and was no longer displayed on the **List Members** tab of the *Marketing Lists (CR204000)* form, the system still displayed the contact on the *Hubspot Marketing List Members (HS205051)* form even after a user clicked the **Fetch** button.

AC-234349: On the **Activities** tab of the *Opportunities (CR304000)* form, if a user tried to create a task, an event, or an activity, the following error occurred: *"Contact '...' cannot be found in the system"*.

AC-234486: In the mobile app, if a user tapped **Print Quote** on the *Sales Quote* screen, an error occurred.

AC-234953: On the *Task (CR306020)* form, if a task had the *Completed* status, and a user added a note by clicking **Notes** on the form title bar, the date and time in the **Completed At** box on the **Details** tab was changed to the current date and time.

AC-235962: On the *Opportunities (CR304000)* form, if a user uploaded detail lines by using the **Load Records from File** button on the **Details** tab, the **Amount** and **Total** values were calculated incorrectly.

AC-236002: If a user created any email activities for leads, contacts, or business accounts by using the **Add Email** button on the **Members** tab of the *Marketing Campaigns (CR202000)* form, these email activities were not counted in the **Campaign Statistics** section on the **Campaign Details** tab.

AC-236861: If a user set criteria to archive emails on the *Email Preferences (SM204001)* form, the system did not archive all target emails even though the criteria were met.

AC-237295: In the mobile app, a user could not change UOM in a sales quote.

AC-237343: On the *Leads BI (CR3010BI)* form, the **Lead Qualification Time** and **Lead Response Time** columns were located at the end of the table.

AC-240230: In the Default/22.200.001 endpoint version, a developer can populate the **Currency ID** box and change the state of the **Enable Currency Override** check box on the *Business Accounts (CR303000)* form via API calls.

AC-241147: On the *Lead Classes (CR207000)*, *Contact Classes (CR205000)*, *Business Account Classes (CR208000)*, *Opportunity Classes (CR209000)*, or *Case Classes (CR206000)* form, if a default email account was specified and then deleted, a record of a class has been created, and then a user clicked **Create Email** on the More menu of the record's data entry form, the following error was shown: *An error occurred during processing of the field From value 22. Error: The record has been deleted.*

Finance

AC-135686: On the *Master Financial Calendar (GL201000)* form, after the calendar template had been modified, it was possible to generate inconsistent periods for a year before the first existing financial year.

AC-148790: On the *Vendors (AP303000)* form, users experienced issues because of non-sequential tab navigation.

AC-166795: If on the **Billing** tab of the *Customers (AR303000)* form, the *Open Item* statement type was selected for a customer and a payment of the customer had been voided, both the payment and the voided payment were included in the statement generated for the customer even though the statement was expected to contain only documents that were open on the statement date.

AC-175945: On the *Release AP Documents (AP501000)* form, it was possible to release a payment document with an empty value in the **Vendor Ref.** column even if the payment method specified for the AP payment had the **Require Unique Payment Ref.** check box selected on the **Settings for Use in AP** tab of the *Payment Methods (CA204000)* form. No error messages were shown in the **Processing** dialog box.

AC-178416: If on the *Account Payable Preferences (AP101000)* form, the **Enable Early Checks** check box was cleared and a user tried to pay a bill created in a future period, the following unclear error message was displayed: *An error occurred during the processing of the field Reference Nbr.: Error: 'Reference Nbr.' cannot be found in the system.*
Fix Description: Now the message shows the following text: *The {Ref. Nbr.} bill cannot be paid on {business date}, as it is posted in a future period ({Post Period}) and the Enable Early Checks check box is cleared on the Accounts Payable Preferences (AP101000) form.*

AC-179731: Users experienced performance issues when running a process on the *Print Statements (AR503500)* form in large MySQL databases.

AC-185437: The following fields have been added to the `CABatchDetail` database table:

- `CreatedByID`
- `CreatedByScreenID`
- `CreatedDateTime`
- `LastModifiedByID`
- `LastModifiedByScreenID`
- `LastModifiedDateTime`
- `tstamp`

AC-193191: On the *Customer Summary (AR401000)* and *Vendor Summary (AP401000)* forms, an incorrect default period was set in the **Period** box if a business date was in January.

AC-204745: On the *Convert Purchases to Assets (FA504500)* form, it was possible to filter the lines in the upper table by the **Selected Quantity**, **Selected Amount**, and **Open Quantity** columns. Because the values in these columns are recalculated after a line is added to the lower table, both tables were cleared after a new line was added to the lower table.
Fix Description: Filtering by the **Selected Quantity**, **Selected Amount**, and **Open Quantity** columns is now prohibited.

AC-207518: On the *Credit Terms (CS206500)* form, a user could delete a credit terms record if the record had already been used in a document created on the following forms: *Sales Orders (SO301000), Invoices (SO303000)*, or *Invoices and Memos (AR301000)*.

AC-208142: On the *Checks and Payments (AP302000)* form, it was not possible to create the first check if there were already prepayments in the system.

AC-211786: In rare cases, a cash account configured on the *Cash Accounts (CA202000)* form could be linked to a GL account with the **Cash Account** check box cleared on the *Chart of Accounts (GL202500)* form. When a user tried to release a cash transaction, a funds transfer, or a bank deposit for such a cash account, the release process failed with the following error: *Cannot release documents. Please contact support.*
Workaround: Please find the solution in [this knowledge base article](#).

AC-215816: If the *Payment Application by Line* feature was enabled on the *Enable/Disable Features* (CS100000) form, and an attempt was made to create a payment by using the REST API, an error occurred.
Fix Description: The `LineNbr` field has been added to the endpoint.

AC-219582: On the *Payments and Applications (AR302000)* form, users could release an AR payment created for a cash account that had the **Cash Account** check box cleared on the *Chart of Accounts (GL202500)* form. The issue occurred because the cash account was not marked as a cash account in the `Account` table due to a failed update script. This situation lead to data inconsistency between the general ledger and the cash account subledger.
Fix Description: An additional check of data consistency has been added. The following error message has been added: *CA Error: This cash account is mapped to the {account} GL account for which the Cash Account check box is cleared on the Chart of Accounts (GL202500) form.*

AC-221721: On the *Fixed Assets (FA303000)* form, if an asset class was not specified and a user clicked **Save**, the following unclear error message was shown: *An unhandled exception has occurred in the function 'MoveNext'. Please see the trace log for more details.* Now the *Asset Class cannot be empty* error message is shown next to the **Asset Class** box.

AC-222062: On the *Customer Contracts (CT301000)* form, if a user clicked **Run Contract Billing**, AR invoices were generated even if the billed amount was zero.

AC-222070: On the *Bank Transactions History (CA402000)* form, the **Entry Type ID** column was empty.
Fix Description: The **Entry Type ID** column has been removed from the table on the *Bank Transactions History* form, because this column was not used before and is cleared after processing of bank transactions.

AC-222491: Users experienced performance issues when they printed customer statements with the *Balance Brought Forward* type by using the process on the *Print Statements (AR503500)* form.
Workaround: Please find the solution in [this knowledge base article](#).

AC-222790: On the *Process Bank Transactions (CA306000)* form, an unclear error message was displayed if a user tried to process a transaction matched to an invoice with charge, if the entry type of the charge was associated with an account that had an **Account Group** specified on the *Chart of Accounts (GL202500)* form. The project had to be specified and it was not possible on the *Process Bank Transactions* form.
Fix Description: The error message has been corrected to provide a user with a list of actions for issue resolution.

AC-223901: On the *Customers (AR303000)* form, a user could not add contacts for a customer with the *Credit Hold* status.

AC-223968: On the *Budgets (GL302010)* form, when a user deleted a node containing child subarticles, the system deleted only the node itself and left the orphan subarticles in the system. The subarticles were not shown in the table on the *Budgets* form, but due to the issue, the users were not able to compare the budget amounts with the actual numbers on the form.

AC-224864: On the *Invoices and Memos (AR301000)* form, if a user changed an external tax zone to another tax zone that did not contain taxes, original taxes remained unchanged.

AC-225978: On the *Bank Transactions History (CA402000)* form, the amount of the AP batch was not displayed in the **Disbursement** column.
Fix Description: The bank transaction record has been updated with the amount of the matched AP batch to show correct data in the **Matched Disbursement** column.

AC-227173: On the *Import Consolidation Data (GL509000)* form, a user was able to create duplicated consolidation batches for the same consolidation setup.

AC-227430: On the *Process Bank Transactions (CA306000)* form, an unclear error message was displayed when a user was trying to process a matched transaction for a cash account. The error occurred if the cash account was not marked as a cash account in the Account table due to a failed update script.
Fix Description: The error text has been changed to help users locate the issue and correct the data inconsistency.

AC-227892: In the TaxHistorySumManager class, the public static void UpdateTaxHistorySums(PXGraph graph, RoundingManager rmanager, string taxPeriodId, int? revisionId, int? organizationID, int? branchID, Func ShowTaxReportLine = null) method was replaced by the following method: public static void UpdateTaxHistorySums(PXGraph graph, RoundingManager rmanager, string taxPeriodId, int? revisionId, int? organizationID, int? branchID, Func<pxresult, bool> ShowTaxReportLine = null)</pxresult>.
In the TaxReportMaint graph, the public static Dictionary> AnalyseBuckets(PXGraph graph, int BAccountID, int TaxReportRevisionID, string TaxLineType, bool CalcWithZones, Func ShowTaxReportLine = null) method was replaced by the following method: public static Dictionary> AnalyseBuckets(PXGraph graph, int BAccountID, int TaxReportRevisionID, string TaxLineType, bool CalcWithZones, Func<pxresult, bool> ShowTaxReportLine = null)</pxresult>.

AC-228870: On the *Invoices and Memos (AR301000)* form, when a user tried to create a payment for the selected invoice, but the invoice could not be paid for some reason (for example, it was under correction), an irrelevant error message referring to an AP document was displayed.

AC-229442: On the *Convert Purchases to Assets (FA504500)* form, if a value in the **Branch** box was not specified and a user added a new asset line, the following unclear error message was shown: *Nullable object must have a value.*

AC-231150: On the *Tax Adjustments (TX301000)* form, a document created by the copy and paste operation showed incorrect balance if the tax period of the copied document was closed.

AC-231306: In the Acumatica mobile app, the **Branch** field was not exposed in the *Expense Receipt* screen.

AC-233749: If a user processed a customer statement on the *Print Statements (AR503500)* form, the system generated an email from an incorrect default email account.

AC-234254: On the *Tax Categories (TX205500)* form, a user could delete a tax category if this category had already been used as a default tax category for a tax zone.

AC-234892: On the *Journal Vouchers (GL304000)* form, if a transaction with a GL transaction code was added, and the length of the transaction's **Ext. Ref. Number** was longer than 15 characters, once the journal voucher was released and a GL batch was created on the *Journal Transactions (GL301000)* form, only the first 15 characters of the transaction's **Ext. Ref. Number** were copied to the **Ref. Number** column for the GL batch.
Fix Description: Data validation has been added to the *Journal Vouchers* form: if the length of **Ext. Ref. Number** for transactions with a GL transaction code exceeds 15 characters, the system displays an error message and the journal voucher cannot be released until the issue is resolved.

AC-235052: On the *Import Bank Transactions (CA306500)* form, when a user tried to upload `.qbo` files from a particular bank, the system displayed the following error message: *CA Error: Unsupported Encoding or Charset (1) detected in the header.*
Workaround: In the `.qbo` file, manually remove the spaces in the file header.

AC-236115: Users experienced performance issues when running a process on the *Print Statements (AR503500)* form in large MySQL databases.

AC-236579: If access to some GL accounts was restricted on the *GL Account Access (GL104000)* form, the restriction settings were not applied correctly to the cash adjustments specified in the table on the *Funds Transfers (CA301000)* form.

AC-236920: In some cases, if the *Multiple Calendar Support* feature was enabled on the *Enable/Disable Features (CS100000)* form, the *AP Payment Register (AP622500)*, *AP Register Detailed (AP622000)*, and *AP Edit Detailed (AP610500)* reports did not show correct data if a user opened these reports from the following data entry forms: *Bills and Adjustments (AP301000)*, *Checks and Payments (AP302000)*, and *Quick Checks (AP304000)*.

AC-237020: Checks that had the *Pending Approval* status on the *Checks and Payments (AP302000)* form were not displayed on the *Approvals (EP503010)* form.

AC-237083: Users experienced performance issues on the *Payments and Applications (AR302000)* form.

AC-237217: A user could modify the usage of a reason code in the **Usage** box on the *Reason Codes (CS211000)* form even if this reason code had already been specified on the *Accounts Receivable Preferences (AR101000)* form.

AC-237579: On the *Checks and Payments (AP302000)* form, if a user typed the **Payment Ref.** value manually, the system no longer offered a user to override the **AP/PR Last Reference Number** on the *Cash Accounts (CA202000)* or *Payment Methods (CA204000)* form if the **Payment Ref.** value did not end with a digit and thus could not be incremented.

AC-237708: In the `FinPeriodStatusProcess.cs` file, the `PX.Objects.GL.LineBranch` and `PX.Objects.GL.INSiteBranch` DACs have been marked as `PXHidden` and `Obsolete`. Also, these DACs have been removed from the *IN656500.rpx* report.

AC-238504: The **Term Start Date** and **Term End Date** boxes were available on the *Purchase Orders*

(PO301000) form even if the *Deferred Revenue Management* feature was disabled on the *Enable/Disable Features (CS100000)* form.

AC-238650: On the *Payments and Applications (AR302000)* form, when a user voided an AR payment with bank charges, the charge amount from the voided payment was posted to the date of the original AR payment instead of the date of the voided payment.

AC-239004: In AR invoices created via the API it was not possible to suppress recalculation of taxes by using the `ARRegister.IsTaxValid` flag.

AC-240202: The `CATran` table did not support the *Voided* status, so if a related payment or bank deposit was voided, it was not visible on some forms, such as *Cash Account Details (CA303000)*.

AC-240649: On the *Entry Types (CA203000)* form, it was possible to delete an entry type that was used on the *Bank Transaction Rules (CA204500)* form.
On the *Process Bank Transactions (CA501000)* form, if a bank transaction rule referenced in a deleted entry type was applied to a transaction, the following unclear error message was shown: *Error Object reference not set to an instance of an object*.

AC-241243: On the *Process Bank Transactions (CA306000)* form, in rare cases, if on the **Create Payment** tab, a user tried to create a payment with taxes for a transaction, then unmatched the transaction and saved the changes, the following error occurred: *Error: 'TaxZoneID' cannot be empty.*

AC-246761: On the *Entry Types (CA203000)* form, it was possible to delete an entry type that was used on the *Bank Transaction Rules (CA204500)* form.
On the *Process Bank Transactions (CA501000)* form, if a bank transaction rule referenced in a deleted entry type was applied to a transaction, the following unclear error message was shown: *Error Object reference not set to an instance of an object*.

Inventory and Order Management

AC-107055: On the *Process Shipments (SO503000)* form, when a user selected the *Prepare Drop-Ship Invoice* option in the **Action** box, in the lines with purchase receipts, the system did not show the notes that were applied to those purchase receipts on the form title bar of the *Purchase Receipts (PO302000)* form. Also, if the user added a note in the line with a purchase receipt on the *Process Shipments* form, the system did not show this note on the *Purchase Receipts* form for this purchase receipt.

AC-145599: On the *Pick, Pack, and Ship (SO302020)* form, the **Package Content** area, which appeared in Pack mode, took too much space. There was no splitter to regulate the height of the area.
Fix Description: The splitter has been added to the **Package Content** area on the *Pick, Pack, and Ship* form. Now a user can change the height of this area.

AC-162018: It was impossible to process serialized stock items on the *Receive and Put Away (PO302020)* form if the **Auto-Generate Next Number** check box was not selected on the *Lot/Serial Classes (IN207000)* form for their lot/serial classes because the system did not create splits for purchase receipt lines with such items.
Fix Description: In Acumatica ERP 2022 R2, unassigned splits are created for the purchase receipt lines with serialized stock items that have the **Auto-Generate Next Number** check box cleared on the *Lot/Serial Classes* form for their lot/serial classes. Since now it is possible to process the items configured in this way on the

Receive and Put Away (PO302020) form. For each serialized unit, the user will see a separate split, and for the lot-tracked items the user will see the split with the complete quantity to receive.
Workaround: Please find the solution in this knowledge base article.

AC-164843: On the *Inventory Transaction History (IN405000)* form, if the **Include Unreleased** check box was selected, the displayed records were sorted by the **Date** column.
Fix Description: If the **Include Unreleased** check box is selected on the *Inventory Transaction History* form, the displayed records are sorted by the **Release Date** column. Unreleased documents are listed at the end of the report after the released documents and sorted by the **Reference Nbr.** column. The **Release Date** column has been moved to the beginning of the table.

AC-182087: On the *Storage Summary (IN409010)* form, the system did not display lot and serial numbers for items.
Fix Description: On the *Storage Summary (IN409010)* form, the **Location** and **Cart** option buttons have been added, as well as the **Expand by Lot/Serial Number** check box, which allows reviewing inventory by its location and cart, and by lot or serial number.
Workaround: Please find the solution in this knowledge base article.

AC-198395: On the More menu of the *Sales Orders (SO301000)* form, the **Remove Credit Hold** command was moved under the **Reject** command in the **Approval** category.

AC-206477: In some cases, if a customization package was published on an instance, confirming a shipment could lead to data inconsistency, which made it impossible to further process the shipment.
Fix Description: If data is corrupted due to customizations applied to an instance, the system now shows the following error message: *Cannot mark the record as updated because another record with the same key exists in the cache. Contact your Acumatica support provider for the assistance.*

AC-210447: On the *Invoices (SO303000)* form, a user could release a correction invoice or cancellation credit memo when the **Original Document** box in the **Link to GL** section on the **Financial** tab was empty for technical reasons.

AC-215976: When oversold kit stock components were received to the stock, the system used the work-in-progress account as an offset account to balance the posting to the inventory account for oversold components because it was not possible to select a reason code account on the **Stock Components** tab of the *Kit Assembly (IN307000)* form once the original production was released.
On the *Kit Assembly (IN307000)* form, when the user released the production document, the system did not show an error message about the missing reason code account if there were stock components with insufficient quantity and negative quantities were allowed in the item class settings of those components.

AC-219604: On the *Purchase Orders (PO301000)* form, the **Deductible Tax Rate** and **Expense Amount** columns were not shown on the **Taxes** tab.

AC-224472: Sales order types with the *Sales Order*, *Transfer*, *RMA Order*, and *Blanket Order* automation behaviors were available on the *Order Types (SO201000)* form when the *Inventory* feature was not enabled. When a user tried to open those order types, the system showed the following error message: *Cannot open this record for editing: The form SO201000 does not contain it.*

AC-224577: In the error message that was shown on the *Sales Price Worksheets (AR202010)* form because of the missing UOM conversion of items when a user released a sales price worksheet, the system showed the `Inventory ID` database value instead of the `Inventory CD` database value and it was difficult to understand which item the error referred to.

AC-226272: On the *Purchase Orders (PO301000)* form, if a user clicked **Complete Order** for a drop-ship purchase order with lines that were not linked to a sales order, and then reopened it, the **Completed** check box remained selected for the purchase order lines and it was not possible to link the lines to a sales order.
Workaround: Please find the solution in this knowledge base article.
Fix Description: It is possible to clear the **Completed** check box for a line of a drop-ship purchase order if this line meets the following criteria:

- It is not linked to a sales order line.
- It is linked to a sales order line, there are no receipts for this purchase order line, and the linked sales order line is not completed.
- It is partially received and the linked sales order line is not completed.

Also, if the line of the drop-ship purchase order is canceled, it is possible to clear the **Canceled** check box.

AC-226449: If the **Use Shipped-Not-Invoiced Account** check box was selected on the *Order Types (SO201000)* form, in the GL batch posted on release of an SO invoice, inventory issue reference numbers were displayed in the **Ref. Number** column on the *Journal Transactions (GL301000)* form for the lines with the shipped-not-invoiced and COGS accounts.

AC-226865: If for an item in a quote, a user specified an alternate ID that was already used for another item, and then clicked **Copy Order** on the *Sales Orders (SO301000)* form, the system did not copy the line with this item to the sales order.
Workaround: Clear the **Alternate ID** column for the first six lines.
Fix Description: When the user clicks **Copy Order** on the *Sales Orders (SO301000)* form, the system copies the line with the item that has an alternate ID used for another item, clears the **Alternate ID** column, and displays the following error message: *Value 'Alternate_ID' for Alternate ID is already used for another inventory item.*

AC-228635: Performance of calculations has been approved as follows: The `PXFormulaAttribute` attribute now does not call the `SetValueExt` method even if the newly calculated value coincides with the old value. This improvement also excludes additional not-expected validations that may have lead to errors.

AC-231342: On the *Calculate Replenishment Parameters (IN508500)* form, if a user selected the *Calculate* option in the **Action** box and clicked **Process** or **Process All**, in some cases the system showed the following error message: *The number in DemandPerDayMSE does not fit the SQL decimal data type.*

AC-232021: The descriptions of the following DACs have been added: `SOBillingAddress`, `SOShippingAddress`, `SOShipmentAddress`, `SOAddress`, `SOBillingContact`, `SOShippingContact`, `SOShipmentContact`, `SOContact`, `POAddress`, `POContact`, `POShipAddress`, `PORemitAddress`, `POShipContact`, and `PORemitContact`. A user can see these descriptions in the DAC Schema Browser and in the DAC Reference.

AC-232409: Even if DeviceHub was configured for the instance, and a user could mass-print labels for the shipments by selecting the **Print Labels** action in the **Action** box of the *Process Shipments (SO503000)* form, clicking the command with the same name on the *Shipments (SO302000)* form caused the system to open the *Carrier Labels (SO645000)* printed form instead of printing labels via DeviceHub.

Fix Description: If DeviceHub and the printers mapping for the *Carrier Labels* printed form are configured in the system, the labels attached to the shipment are now printed via DeviceHub when the user clicks the **Print Labels** command on the *Shipments* form, together with opening the *Carrier Labels* printed form.

AC-232900: On the *Shipments (SO302000)* form, the **Override Freight Price** check box and the **Freight Price** box were shown on the **Shipping** tab even if the *Sales Order* option was selected in the **Invoice Freight Price Based On** box in the Summary area of the *Shipping Terms (CS208000)* form for the shipping terms of the originating sales order, which means that the freight price in the invoice should be taken from the freight price of the sales order independently from the shipment. The freight price calculated for the shipment was incorrect, and the correct freight price from the sales order was calculated for the created invoice.
Fix Description: The **Override Freight Price** check box and the **Freight Price** box are now hidden on the **Shipping** tab of the *Shipments* form for a shipment if the *Sales Order* option has been selected in the **Invoice Freight Price Based On** in the Summary area of the *Shipping Terms* form for the shipping terms of the originating sales order.

AC-235199: If a sales order or a purchase order was created from a purchase requisition on the *Requisitions (RQ302000)* or *Create Orders (RQ505000)* form, the **Line Type** values for inventory IDs were not copied from the requisition to an order. The system inserted the line type in the sales order and the purchase order from the item.

AC-236754: On the *Sales Orders (SO301000)* form, if a sales order had a confirmed shipment, and then the order was reopened, and a user clicked the **Correct Shipment** command for the shipment on the *Shipments (SO302000)* form, the sales order had the *Open* status instead of the *Shipping* status.

AC-237103: On the *Invoices (SO303000)* form, if the **Hold Invoices on Failed Credit Check** check box was cleared on the *Sales Orders Preferences (SO101000)* form, the system assigned the *Balanced* status to SO invoices that had an application of a credit card payment with the *Capture Failed* status.

AC-238332: On the inventory and order management forms, a user with the *View Only* access rights could put a document on hold.

AC-245973: If the *Customer Discounts* feature was disabled on the *Enable/Disable Features (CS100000)* form and a user entered a value in the **Discount Total** box on the *Sales Orders (SO301000)* form and then changed this value to another one, the Acumatica ERP instance restarted.
Workaround: Please find the solution in this knowledge base article.

System and Platform

AC-170585: If the date field containing the time value was used in the notification template sent by a business event that was triggered by record change, the time value was not converted according to the local timezone.
Workaround: Convert the time value by using the `DATEADD` function in the generic inquiry used for the business event and notification template.
Fix Description: The time value is now converted according to the timezone specified for the *admin* user. If the time zone is not specified, the time value is converted according to the default timezone selected in the instance preferences.

AC-201265: The full-text search functionality could unexpectedly stop working after an upgrade, snapshot restoration, or unsuccessful attempt to copy a company because the full-text search feature became disabled on a

database server.
Workaround: Please find the solution in this knowledge base article.
Fix Description: The system detects that the Full-Text Search feature is disabled on the server and shows a warning message to a user after a global search attempt. The new **Restart Full-Text Search** command has been added on the *Rebuild Full-Text Entity Index (SM209500)* form to restart the full-text search.

AC-212195: On the *Email Templates (SM204003)* form, the width of the **To**, **CC**, and **BCC** boxes was increased.

AC-215993: If a dependency between two fields of a DAC was configured in a customization project, the fields were added as parameters to a generic inquiry on the *Generic Inquiry (SM208000)* form, and the first parameter was assigned a default value, on the inquiry form, for the second parameter, it was not possible to select values corresponding to the initial default value that the system selected for the first parameter.
Workaround: On the inquiry form, change the default value that the system has selected for the first parameter.

AC-219452: An error could occur during the publishing of a customization project if an incorrect screen ID was specified in the action properties for the customized screen that was included in the customization project.
Fix Description: A screen ID can be specified only as a string of 8 characters without dots.

AC-220829: The *Failed to convert parameter value from a String to a Int32* error could occur when a user attempted to open some entities in the system if a UDF of the *Selector* control type was added to the form, its value was filled in for these entities, and then the UDF field was removed from the form and **Schema Field** for the attribute was changed.
Fix Description: All UDF values for a certain form are removed when the UDF is removed from the form.

AC-220969: In some cases, if the system displayed warnings or error messages next to the boxes with incorrect values, then after a user corrected the values in these boxes, the system still displayed the messages for the boxes.

AC-222679: Microsoft Visual Studio 2022 did not support Acumatica Framework Tools.
Workaround: Use Microsoft Visual Studio 2019.

AC-223143: The colors of score/trend cards have been changed to improve the appearance of the widgets.

AC-223781: The code of the *Process Bank Transactions (CA306000)* form has been refactored: A developer can now partially override the `PaymentReclassifyProcess.AddARTransaction()` method. The following methods that can be overridden have been added:

- `APPayment CABankTransactionsMaint.InitializeAPPayment(APPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, IList aAdjustments, bool aOnHold)`
- `void CABankTransactionsMaint.InitializeCurrencyInfo(APPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, APPayment doc)`
- `APAdjust CABankTransactionsMaint.InitializeAPAdjustment(APPaymentEntry graph, ICADocAdjust adjustment)`
- `ARPayment CABankTransactionsMaint.InitializeARPayment(ARPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, bool aOnHold)`
- `void CABankTransactionsMaint.InitializeCurrencyInfo(ARPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, ARPayment doc)`
- `decimal CABankTransactionsMaint.InitializeARAdjustment(ARPaymentEntry graph, ARAdjust adjustment, decimal curyAppliedAmt)`

- `APPayment PaymentReclassifyProcess.InitializeAPPayment(APPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, IList aAdjustments, bool aOnHold)`
- `void PaymentReclassifyProcess.InitializeCurrencyInfo(APPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, APPayment doc)`
- `APAdjust PaymentReclassifyProcess.InitializeAPAdjustment(APPaymentEntry graph, ICADocAdjust adjustment)`
- `ARPayment PaymentReclassifyProcess.InitializeARPayment(ARPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, bool aOnHold)`
- `void PaymentReclassifyProcess.InitializeCurrencyInfo(ARPaymentEntry graph, ICADocSource parameters, CurrencyInfo aCuryInfo, ARPayment doc)`
- `decimal PaymentReclassifyProcess.InitializeARAdjustment(ARPaymentEntry graph, ARAdjust adjustment, decimal curyAppliedAmt)`

AC-224120: If a DAC had legacy fields, an attempt to add a new field to the DAC with the **Customize Selector Columns** dialog box in the Data Class Editor of the Customization Project Editor caused the following error: *Cannot find the BQL field*.
Fix Description: Legacy fields have been deleted.

AC-226325: On *Request Profiler (SM205070)* form, the **Query Hash** column has been added to tables on the **SQL** tab and in the **View SQL** dialog box on the **Requests** tab.
The value of the `QueryHash` field is now calculated based on the `BqlCommand` string representation—that is, the business logic declared in the data member of a graph with the `PXSelect` expression without any restrictions on the `GroupMask`, `CompanyID`, and other parameters. In other cases, `QueryHash` is calculated in the previous way based on the SQL query text with all the restrictions on the `GroupMask`, `CompanyID`, and other parameters.
Also, information about the view name has been added to the `SQLDigest` field. It contains the data member name of a graph for the `PXSelectBase`-type expressions or the method name where the ad-hoc query was run.

AC-231728: On the *Import by Scenario (SM206036)* form, if processing of records failed, the system did not display an error message in each unproccessed line.

AC-231909: On the **History** tab of the *Export by Scenario (SM207036)* form, if a user selected a record in the table and invoked the **Clear Data** command on the form toolbar, the system cleared all the records in the table instead of the selected record and the records that were created after the creation of the selected one.

AC-232081: If a user opened a new window from a side panel of a generic inquiry, and then the user performed some actions in that window that opened another window, the content of the last opened window the system did not display.

AC-232275: Using an excessively long search string for search in the grid could cause extensive memory consumption on the SQL server.
Workaround: Please find the solution in this knowledge base article.
Fix Description: The maximum length of a search string is limited. The default limit is 100 characters and can be configured by the `FastFilterMaxLength` key of the `web.config` file. Starting from Acumatica ERP 2022 R2, the default limit can be changed on the *Site Preferences (SM200505)* form.

AC-232904: If fields have been disabled or hidden by attributes in the code, it is now impossible to enable these fields or make them visible by workflow configuration in the UI or in the code.

AC-234568: Starting in Acumatica ERP 2022 R2 Preview 1, development tools provided with Acumatica Framework are not supported in Visual Studio 2019. In order to use them, migrate to Visual Studio 2022.

AC-235218: It was possible to restrict a number of concurrent logins from different devices or browsers for a specific UI or API user by configuring the limit on the *Users (SM201010)* or *User Types (EP202500)* form. If the UI user was signed out or the API user failed to sign in due to that limit, the error message was the same as in the case of reaching the license limit of concurrent UI or API users so it was not possible to understand the reason. **Fix Description**: On the *Users* and *User Types* forms, the **Allowed Number of Sessions** setting has been renamed to **Max. Number of Cocurrent Logins** to better reflect the meaning of the limit. Also, the error message for the case of reaching this limit has been changed. If UI users exceed the limit, they will be signed out from their device or browser with the latest activity with the following error message: *You have been logged out because the number of concurrent logins specified for your user account on the Users (SM201010) form has been exceeded.* If API users try to sign in and the limit is reached, the followjng error message will be shown: *The number of concurrent API logins specified for your user account on the Users (SM201010) form has been reached.*

AC-236292: In the generated *Project Cost Transaction History Report (PM706230)* report, the system displayed the subtotals and totals without decimals and extra zero symbols in the fractional part despite the `#,###.00` format.

AC-236700: If a user tried to expose data from a generic inquiry that has a period at the end of name in the **Inquiry Title** box, the following error occurred: *OData: Request failed: The remote server returned an error: (500) Internal Server Error. (An error has occurred.)*

AC-236846: If on the *Tenants (SM203520)* form, a user created a snapshot with the **Prepare for Export** check box selected in the **Create Snapshot** dialog box, and the value of the `queryTimeout` parameter in the `web.config` file was greater than 600 ms, the system displayed the following error message when the user tried to restore this snapshot: *Restore snapshot error: Invalid CommandTimeout value -1389934592; the value must be >= 0. Parameter name: CommandTimeout*.

AC-236866: On the *Dashboards (SM208600)* form, the system displayed the *Another process has added the 'RolesInGraph' record. Your changes will be lost.* error message if a user performed the following actions:

1. Selected the **Make Visible on the UI** check box for a dashboard
2. Defined the access rights on the **Visible To** tab
3. Copied and pasted this dashboard
4. For the created dashboard, selected the **Make Visible on the UI** check box
5. Tried to save the created dashboard

AC-237460: On the *Site Map (SM200520)* form, if a user added rows with the same screen ID and different URLs, various problems could occur.

AC-237586: KPI widgets could show incorrect values if a user specified the parameters in the properties of the dashboards and selected these parameters for filtering the widget data.

AC-238330: On the *Sales Orders (SO301000)* form, when a user edited sales orders of the *SO* or *IN* types with a large amount of detail lines and columns with check boxes in Google Chrome, the system response could be slow.

AC-240678: if the row set with the zero height row was defined for a report, the report could be displayed poorly.

AC-241254: On the *Process Data (BC501500)* form, the synchronization of stock, non-stock, and template items with a Shopify store in the cases of big amounts of the inventory could lead to excessive memory consumption. As a result, the process was restarted every two hours.

AC-241662: If a user filtered records in a table on any Acumatica ERP form by using the quick search (that is, by using the Search box located in the filtering area at the top of the table), and then exported the records to an Excel file, the Excel file could be empty or could contain only a part of the filtered records. This issue occurred if the instance was configured to use the *Contains* condition for the table search (this condition can be selected in the **Search Condition** box on the *Site Preferences (SM200505)* form), but the system still used the *Start With* condition for the export to Excel.
Workaround: Please find the solution in this knowledge base article.

AC-246321: If the **Automatically Adjust Height** option was set in the data table widget in the widget properties dialog box on the dashboard, the widget height was not adjusted automatically and had the scrollers.

AC-246686: The number of detail lines on a report page and, accordingly, the number of pages in the report could be changed when switching between PDF and HTML views. This happened because the `PageIndex` variable was not reset when switching to HTML view.
Workaround: Refresh the page or open the report directly in the HTML view.

Web Services API

AC-217294: The frameset API, which is used for the UI implementation, has been moved from ASP.NET Web API to ASP.NET Core. This migration includes the following changes:

- Batching of requests has been eliminated because ASP.NET Core does not support it. Instead of a batch, the requests are now sent one by one.
- The data is now sent to the client in a camel case instead of a pascal case.
- UI controls are made internal instead of public.

AC-220709: It was possible to execute API requests during the scheduled lockout.

AC-237960: When an iOS user signed in to Acumatica mobile app of version 22.050.0 or higher that was used with Acumatica ERP 2022 R2 Preview 1, the following error message was shown: *Preferences for user <User Name> not found*.
Workaround: Specify any preferences for the affected user on the *User Profile (SM203010)* form, e.g. change the email signature.

Mobile

AC-206880: If on the *Task* screen of the Acumatica mobile app, a user selected a date in the **Start Date** field and then saved the task, the system changed to the date of the previous day.

Payroll

AC-187757: On the *Employee Payroll Settings (PR203000)* form, the **Net Pay Minimum** box has been moved from the **General** tab to the **Deductions and Benefits** tab.

AC-205545: In the Summary area of the *Weekly Crew Time Entry (EP307100)* form, the **Week** box has been marked with an asterisk as a mandatory setting.

AC-205778: On the *Work Locations (PR101040)* form, a validation has been added to prevent a user from changing the specified country if the work location is already used in an employee class or employee payroll settings.

AC-210851: On the *Shift Codes (PR103000)* form, the left-side table has been labeled **Shift Codes** and the right-side table has been labeled **Rates**.

AC-211795: On the *Time & Expenses Preferences (EP101000)* form, the **General Settings** tab has been renamed to **General** and the **Custom Week Settings** tab has been renamed to **Custom Week**.

AC-212041: On the *ACA Reporting (PR207000)* form, the **Aggregate Group Information** tab has been renamed to **Aggregate Group**.

AC-218988: On the **Paid Time Off** tab of the *Paychecks and Adjustments (PR302000)* form, the labels of UI elements have been changed as follows:

- **Hours Accrued** to **Total Accrued Hours**
- **Hours Used** to **Total Used Hours**
- **Hours Available** to **Total Available Hours**
- **Total Accrual Hours** to **Paycheck Accrual Hours**
- **Total Disbursement Hours** to **Paycheck Disbursed Hours**
- **Total Accrual Calculation** to **Paycheck Accrual Calculation**
- **Accrual Hours** to **Paycheck Accrual Hours**

On the **Paid Time Off** tab of the *Employee Payroll Settings (PR302000)* form, the labels of UI elements have been changed as follows:

- **Hours Accrued** to **Total Accrued Hours**
- **Hours Used** to **Total Used Hours**
- **Hours Available** to **Total Available Hours**

AC-222397: On the **General Info** tab of the *Employee Payroll Settings (PR203000)* form, if the country of the home address of the selected employee differs from their branch's country, the system will now display a warning that these addresses should have the same country specified.

AC-226996: In the Summary area of the *Paychecks and Adjustments (PR302000)* form, the **Termination Reason** box has been marked with an asterisk as a mandatory setting.

AC-229302: On the **US Tax Settings** tab of the *Deduction and Benefit Codes (PR101060)* form, the **Allow Supplemental Election** check box has been renamed to **Include Supplemental Earnings**.

AC-229479: On the **Certified Project** tab of the *Paychecks and Adjustments (PR302000)* form, the **Deduction and Benefit Packages** button has been renamed to **View Deductions and Benefits**.

AC-229481: On the *Workers' Compensation Codes (PR209800)* form, the **Maximum Insurable Wages** button has been renamed to **View Max Insurable Wages**.

AC-230264: On the *Workers' Compensation Codes (PR209800)* form, the **WCC Code** table has been renamed to **WCC Codes** and the **Rate** table has been renamed to **Rates**.

AC-235525: On the *Weekly Crew Time Entry (EP307100)* form, the week that corresponds to the week of the business date is now displayed at the top of the Week lookup table by default.

AC-237129: On the *Paychecks and Adjustments (PR302000)* form, a user could create, calculate, and release multiple paychecks for the same pay period at the same time. This could lead to issues with deduction, benefit, and tax limits because the other paychecks for the same pay period were not taken into consideration for the limit calculation.

Project and Construction

AC-86970: Due to performance optimization, on the **Balances** tab of the *Projects (PM301000)* form, when a user clicked **Refresh**, values from the database were not re-fetched and, therefore, figures could not be updated. **Workaround**: Click **Cancel** on the form toolbar of the *Projects* form.

AC-94817: The system did not indicate the reason why no pro forma invoice or AR invoice has been generated when a user ran the billing process on the *Projects (PM301000)* or *Run Project Billing (PM503000)* form.

AC-106764: For the project templates that have the *On Hold* status shown on the *Project Templates (PM208000)* form, the *In Planning* status has been displayed on the *Project Templates (PM2080PL)* form.

AC-123160: On the **Time and Material** and **Progress Billing** tabs of the *Pro Forma Invoices (PM307000)* form, the users can now manually change the sales accounts, but only to those accounts that are included in an account group.

AC-169041: The *Pro Forma Invoices (PM307000)* form did not contain the **Customer Order Nbr.** box.

AC-172036: On the *Request for Information (PJ3010PL)* form, the **My RFIS** tab has been renamed to **My Requests**.

AC-197260: If the group account has been deleted from an account group on the *Chart of Accounts (GL202500)* form, users will not be able to release an invoice that has the deleted account specified for the invoice lines on the *Invoices and Memos (AR301000)* form.

AC-205930: On the *Change Requests (PM308500)* form, when a user selects a value in the **Inventory ID** column on the **Estimation** tab for a line, the system now automatically inserts a value in the **Account Group** column for this line according to the stock item's COGS account which is specified on the **GL Accounts** tab of the *Stock Items (IN202500)* form or the non-stock item's Expense account which is specified on the **GL Accounts** tab of the *Non-Stock Items (IN202000)* form.

AC-206242: The system did not prevent a user from deleting or deactivating a branch that was used in pro forma invoices. As a result, after the user has deleted or deactivated the branch on the *Branches (CS102000)* form, the user was not able to process or delete a pro forma invoice with this branch on the *Pro Forma Invoice (PM307000)* form.

AC-213036: The **Allocation Settings** tab of the *Allocation Rules (PM207500)* form contained the **Filter** box, in which users could select only the *Specific Branch* option. However, when users ran the calculations, the system took into account the value in this box, and updated the settings incorrectly.

AC-215000: If an opportunity was copied and pasted on the *Opportunities (CR304000)* form, and then on the *Project Quotes (PM304500)* form, a project quote was created based on that opportunity, the created project quote had a negative amount in the **Total Cost** box in the Summary area.
Fix Description: On the *Project Quotes* form, for project quotes created from opportunities, the system sets the value in the **Total Cost** box to *0*.

AC-219711: If on the *Project Tasks (PM302000)* form, the value in the **Completion Method** box was *Budgeted Amount* or *Budgeted Quantity*, then the value in the **Completed (%)** column on the *Project Tasks (PM3020PL)* form did not coincide with the value in the **Completed (%)** box on the **Summary** tab of the form and was incorrect.

AC-219969: When a user creates a corporate card on the *Corporate Cards (CA202500)* form, the user can now select the branch for which this corporate card is created.

AC-220592: If a common task was configured in the system, with optional boxes left blank, and a user added this common task on the **Tasks** tab of the *Projects (PM301000)* form, then on the *Project Tasks (PM302000)* form for this task, the system updated only the **Allocation Rule** and **Billing Rule** boxes with the default values from the project settings.

AC-222745: On the **Defaults** tab of the *Projects (PM301000)* and *Project Templates (PM208000)* forms, the **Default Values** section has been renamed to **GL Accounts**. Also, on these forms, the **Time Activity Approver** box has been moved to the **Summary** tab.

AC-223715: If the **Accrue Cost** check box on the **Price/Cost** tab of the *Non-Stock Items (IN202000)* form was selected for an item, no project transactions were generated on release of a quick check that was created on release of an expense claim with that non-stock item.

AC-224587: On the *Pro Forma Invoices (PM307000)* form, it was impossible to correct a pro forma invoice if it had been already corrected before, and the corrections had been deleted.

AC-225405: When a user tried to create a change order on the *Projects (PM301000)* form while the **Manual Numbering** check box was selected for the *CHANGEORD* numbering sequence on the *Numbering Sequences (CS201010)* form, the following error occurred: *CS Error: Cannot generate the next number. Manual Numbering is activated for 'CHANGEORD'*.

AC-226722: If on the *Pro Forma Invoices (PM307000)* form, a user performed mass deletion of lines, the system stopped by a timeout.

AC-227278: On the *Projects (PM301000)* form, when a user copied a project with some values specified on the **User-Defined Fields** tab, the system did not paste these values to the new project.

AC-227306: In the **Retainage** section of the **Summary** tab of the *Projects (PM301000)* form, the **Include CO** check box was displayed and was available even if the change order workflow was not enabled for the project, or if the *Change Orders* feature was disabled on the *Enable/Disable Features (CS100000)* form.

AC-227462: If on the *Invoices and Memos (AR301000)* form, a user added a new detail line to an AR invoice, the related project had a default task, and the sales account from the customer record was not mapped to a project account group, the system added an empty detail line when the user saved the project invoice, and did not allow the user to delete this empty detail line.

AC-227769: On multiple Acumatica ERP forms, if a user tried to enter an inventory item ID that contained the underscore character, the system displayed the following error: *'Inventory ID' cannot be found in the system.*

AC-227950: If on the *Enable/Disable Features (CS100000)* form, all multicurrency-related features were disabled, the system displayed the **Currency Rate Type** box on the **Summary** tab of the *Projects (PM301000)* form.

AC-228258: In the *Substantiated Billing - Consolidated (PM650050)* report, the values in the **GL Date** and **Date** boxes were mixed up.

AC-228389: On the *Billing Rules (PM207000)* form, for a step of a billing rule with the *Progress Billing* type, the name of the **Create Lines with Zero Amount** check box has been changed to *Create Lines with Zero Amount and Quantity*.

AC-228669: On the *Projects (PM301000)*, *Project Quotes (PM304500)*, and *Project Templates (PM2080PL)* forms, the **Template ID** column had the wrong header (*Project ID*) in the table in the lookup box.

AC-228677: If a user added the `OrderType` field to a customization project for the *Subcontracts (SC301000)* form, published the project, and then tried to open any subcontract on the *Subcontracts* form, the following error occurred: *An item with the same key has already been added.*

AC-228788: In the *Project WIP Detail (PM652000)* and *Project WIP Detail with Date Range (PM652500)* reports, the headers of the **Commitments** columns had an incorrect spelling.

AC-228791: If a user created a project issue or a request for information via the Acumatica add-in for Outlook, the **Class ID** box was not marked as required. If a user did not select a project management class in this box, the system displayed an error message.

AC-228813: If a user created a request for information by using the Acumatica add-in for Outlook, the **Status** box with the only value available for selection (*New*) was shown.

AC-229714: In some cases, if an AP bill contained lines with the configured account, and the lines were linked to an existing project, the system removed the account from the account group. The system then allowed the users to release the bill without any warnings or errors, and did not generate the project transaction.

AC-230232: The *Common Tasks (PM208030)* form did not contain the **Type** box with the task type.

AC-230556: If on the *Labor Rates (PM209900)* form, a user added a new row, selected *Employee* in the **Labor Rate Type** column, left the default values in other columns, did not save the changes, and then added a new row again and also selected *Employee* in the **Labor Rate Type** column, the following error occurred: *PM Error: A row with the same effective date and similar settings already exists. You may need to change the effective date, review and update the settings specified in this row, or delete the row before saving the changes.* Also, the system deleted the default values in the added row.

AC-230873: If on the *Enable/Disable Features (CS100000)* form, the *Construction* feature was enabled, and a user created a project on the *Projects (PM301000)* form by using a project template created on the *Project Templates (PM208000)* form, the project task types were not inherited from the project template.

AC-231035: If a subcontract with the *Open* status contained lines with the configured account, the lines were linked to an existing project, and the account was removed from the account group, the system allowed a user to create an AP bill without any warnings or errors by doing any of the following:

- Clicking **Enter AP Bill** on the *Subcontracts (SC301000)* form
- Clicking **Add Subcontract** on the **Details** tab of the *Bills and Adjustments (AP301000)* form
- Clicking **Add Subcontract Line** on the **Details** tab of the *Bills and Adjustments (AP301000)* form

If the user then released such a bill, the system did not generate the project transaction.

AC-231106: If on the *Print/Email Lien Waivers (CL502000)* form, a user selected the *Email Lien Waivers* action, selected the unlabeled check boxes in some of the rows, and then clicked **Process**, the following error message appeared: *Sequence contains no matching element.*

AC-231306: In the Acumatica mobile app, the **Branch** field was not exposed in the *Expense Receipt* screen.

AC-231580: In the *Substantiated Billing (PM650000)* report, the system did not display any address information under the project name.

AC-231797: On the *Change Orders (PM308000)* form, it was possible to enter lowercase characters in the **Commitment Nbr.** column of the **Commitments** tab.

AC-232146: The name of the **Track Time** check box has been changed to **Track Time and Costs** on the following forms:

- *Activity (CR306010)* (for activities of any type)
- *Activity Types (CR102000)*
- *Email (CR306015)* (on the **Details** tab)

Also, the project attributes on these forms are now defaulted depending on the form on which an activity is created.

AC-232286: On the *Enable/Disable Features (CS100000)* form, if the *Multiple Base Currencies* feature was enabled, a user could not enable the *Time Management* feature.

AC-232380: In the Acumatica add-in for Outlook, the title of the **Request for Information** box in the **Info** section has been changed to **RFI** to simplify the layout.

AC-232460: If on the **Projects** tab of the *Project Access (PM102000)* form, the check box in the **Included** column was selected for some records, and a user tried to sort records in this column, the system did not perform the sorting.

AC-233418: If on the **Time and Material** tab of the *Pro Forma Invoices (PM307000)* form, a user manually changed the sales account to the account that is not included in any account group, the system did not display an error as it did on the **Progress Billing** tab.

AC-233473: PM transactions with the *Unbilled Remainder* and *Unbilled Remainder Reversal* original document types created on the release of an AR invoice on the *Invoices and Memos (AR301000)* form, inherited the date and post period of the corresponding PM transaction whereas they should contain the same date and period as the AR Invoice on whose posting they were created.

AC-233696: If a user searched for a particular subcontract and tried to open it from the global search results, the newly created subcontract was opened instead of the needed document.

AC-234002: A user was able to select an inactive customer location on the following forms:

- *Project Quotes (PM304500)*
- *Sales Quotes (CR304500)*
- *Projects (PM301000)*
- *Opportunities (CR304000)*
- *Expense Claim (EP301010)*
- *Expense Receipt (EP301010)*
- *Pro Forma Invoices (PM307000)*
- *Project Tasks (PM302000)*
- *Project Transactions (PM304000)*

AC-234213: If the project approval was configured, on the *Projects (PM301000)* form, a user could activate a project before it has been approved.

AC-234247: When a user created a snapshot on the *Tenants (SM203520)* form, in the *Settings and Business Accounts*, *Settings and Business Accounts Without Attachments*, *Settings Except Attachments*, or *Settings Only* export mode, the data from the *Rate Tables (PM206000)*, *Rate Lookup Rules (PM205000)*, *Rate Types (PM204100)*, and *Labor Rates (PM209900)* form was not added to the created snapshot.

AC-235165: If the visibility of a project was restricted for a user on the *Project Access (PM102000)* form, the user could still find and view the restricted project by using search, that is, by entering the project name in the Search box at the top pane of the Acumatica ERP screen.

AC-235464: When a user imported estimation lines from an Excel file on the **Estimation** tab of the *Project Quotes (PM304500)* form, the system did not update the value of the **Total Sales** box in the Summary area.

AC-235647: When a user created a rate code on the *Rate Tables (PM206000)* form and then clicked the **Delete** button to delete this rate code, the system deleted all the rates configured for other rate codes in the **Rate** table.

AC-236292: In the generated *Project Cost Transaction History Report (PM706230)* report, the system displayed the subtotals and totals without decimals and extra zero symbols in the fractional part despite the `#,###.00` format.

AC-236379: Ascending and descending sorting did not work for the **Start Date** column on the **Activities** tab of the *Projects (PM301000)* form.

AC-236468: On the *Payment Methods (CA204000)* form, if a user tried to change the description of a payment method that had a cash account configured for use of corporate credit cards, the system displayed the following error message: *CA Error: You cannot delete the associated cash account because it is configured for corporate cards. If you need to change the payment method for this cash account, please use the Cash Accounts (CA202000) form.*

AC-236581: On the *Projects (PM301000)* form, the **Currency Rate for Budget** box in the Summary area was shown when the *Multicurrency Projects* was not enabled on the *Enable/Disable Features (CS100000)* form.

AC-236853: The system could not import a project budget forecast if `Items.Current` was set to *null*.

AC-236990: The filtering and sorting functionality did not work for the **Owner** column on the **Activities** tab of the *Projects (PM301000)* form.

AC-237034: When a vendor record was inactive on the *Vendors (AP303000)* form, a user was still able to select the vendor in the **Vendor** box on the *Change Requests (PM308500)* form.

AC-237613: In a line added on the **Summary** tab of the *Employee Time Cards (EP305000)* form, a user could select a project task that had the *Canceled* status.

AC-237975: If an inventory ID was specified for a vendor in the **Project Defaults** section of the *Vendors (AP303000)* form, when a user tried to release a change order for this vendor on the *Change Orders (PM308000)* form, the system showed the following error message: *Unit conversion <...> is missing.*

AC-238220: If the **Automatically Post on Release** and **Automatically Release Allocations** check boxes were selected on the *Project Preferences (PM101000)* form, when a project-related paycheck was released on the *Paychecks and Adjustments (PR302000)* form, the generated GL batch was not automatically posted to the general ledger.

AC-238552: On the **Change Requests** tab of the *Change Orders (PM308000)* form, when a user opened the **Select Change Requests** dialog box, selected the lines to be added, and clicked the **Add Change Requests** button multiple times, the system incorrectly increased the values for the change request in the Summary area of the form.

AC-238571: On the *Projects (PM301000)* form, the value of the top attribute line on the **Attributes** tab disappeared when a user deleted and added a new task to the project.

AC-238878: In the *Project Cost Budget Status (PM655000)* report, if there were more than one project task of the same type and with the same ID in multiple projects, and a user tried to review the details by clicking a project task ID, the system opened an incorrect project task on the *Project Tasks (PM302000)* form.

AC-241629: On the *Activities (CR306010)* form, if the **Track Time and Costs** check box was selected in the Summary area and the **Project**, **Project Task**, and **Cost Code** columns had a value specified, the values in these columns were not cleared when the **Track Time and Costs** check box was cleared.

AC-242201: On the *Submittals (PJ306000)* form, if on the **Submittals Workflow** tab, there was a line with the selected **Email To** check box and an email in the **Email** column was specified, then when the user clicked **Email** on the form toolbar, the system did not insert the email address into the **To:** box of the **Email Activity** form. Also, if the user added two lines to the **Submittals Workflow** tab and selected the **Email To** check box for both, and then the user saved the submittal and refreshed the page, only one line preserved the selected state of the **Email To** check box.

AC-242900: On the **Summary** tab of the *Project Tasks (PM302000)*, *Project Template Tasks (PM208010)*, and *Common Tasks (PM208030)* forms, the **Default Values** section has been renamed to **GL Accounts**. Also, on the same forms, the **Tax Category** box has been moved from the **Default Values** section to the **Billing and Allocation Settings** section.

AC-243501: On the *Progress Worksheets (PM303000)* form, when the user clicked the magnifier button in the **Worksheet Nbr.** box, the system showed two duplicating **Worksheet Nbr.** columns in the **Select - Worksheet Nbr.** dialog box.

AC-246588: On the **Details** tab of the *Progress Worksheets (PM303000)* form, the **Current Period Quantity** column did not include the value from the **Completed Quantity** column of the current line if the status of the document was *Closed*.

Manufacturing

AC-221478: On the **Order Types (SO201000)** form, if *Blanket Order* was selected in the **Automation Behavior** box on the **Templates** tab, and if blanket order type was selected for a sales order on the *Sales Orders (SO301000)* form, the manufacturing-related UI elements were shown on forms.

AC-232285: In the instance where vendor visibility was restricted by branch, when a user initiated creation of a purchase order for the vendor that was unavailable for the user on the *Critical Materials (AM401000)* form, the purchase order was not created but the error message describing the cause was not displayed in the **Processing** dialog box.

AC-233536: On the *MRP Display (AM400000)* form, the ability to look up values has been added to the **Related Document**, **Related Parent Document**, **and Related Product Document** boxes in the Selection area.

AC-233714: When a user changed a customer in a sales order on the *Sales Orders (SO301000)* form, the customer was not changed automatically in the estimate linked to the sales order.

AC-234040: In the instance with the **Use Days of Supply to Consolidate Orders** check box selected on the *MRP Preferences (AM100000)* form, when a user created an item class on the *Item Classes (IN201000)* form, specified a value other than 0 in the **Days of Supply** box, and then created a stock item based on the new item class on the *Stock Items (IN202500)* form, the value of the **Days of Supply** box on the **Manufacturing** tab of the *Stock Items* form was 0.

AC-239897: If for a new company whose base currency was different from *USA*, an overhead was created on the *Overhead (AM202500)* form and a specific value was set in the **Cost Rate** column, the value in the **Fixed Overhead** box on the **Totals** tab of the *Production Order Details (AM209000)* form for a created production order with order details that contained the overhead was calculated incorrectly.

AC-239899: On the *Work Centers (AM207000)* form, if a user added a machine to the **Machines** tab of the form, and this machine was created for a warehouse that belonged to a company with a different base currency, the **Standard Cost** column contained the value copied from the settings of a wrong machine.

AC-241269: If the **Forecasts**, **Inventory on Hand**, and **MPS** check boxes were cleared on the **Manufacturing** tab of the *Warehouses (IN204000)* form, the system still used these data in material requirements planning.

AC-242097: If a sales order and a corresponding production order were created, deleting an inventory line or the entire sales order through the *Production Order Maintenance (AM201500)* form did not result in unlinking the sales order from the production order, and an error occurred.

Retail-Commerce

AC-193541: On the *Sync History (BC301000)* form, the **ERP ID** column of the table in the **Sync Record Details** dialog box now displays the link that a user can click to open the entity related to the synchronization record on an Acumatica ERP form.

AC-212787: If a locale other than *en-US* was activated on the *System Locales (SM200550)* form and then selected for a store in the **Locale** box on the **Connection Settings** tab of the *Shopify Stores (BC201010)* form, when the *Template Item* entity was processed for the store on the *Process Data (BC501500)* or *Sync History (BC301000)* form, the system displayed the following error message: *The template item cannot be synchronized because matrix items based on this template item have not been generated. Please generate matrix items*. The error occurred because there was a limitation on getting values from multilingual fields and only fields in the English language were supported.

AC-221696: On the *Prepare Data (BC501000)* form, the following changes have been made:

- The **Prepared Records** column has been renamed to **Ready to Process**. This column shows the number of synchronization records that have the *Prepared* and *Failed* statuses. The synchronization records with these statuses are displayed on the **Ready to Process** tab of the *Sync History (BC301000)* form.
- The **Processed Records** column now shows the number of synchronization records that have the *Processed* status, which is assigned to synchronization records that have been successfully synchronized. In previous versions of Acumatica ERP, this column showed the number of synchronization records with all statuses other than *Prepared* and *Failed*.
- A new **Total Records** column has been added. The column shows the total number of synchronization records created for an entity.

AC-229267: When the *Stock Item* entity was re-prepared in *Full* prepare mode on the *Prepare Data (BC501000)* form, stock items that had the *Deleted* status on the *Sync History (BC301000)* form were not assigned the *Prepared* status.
Fix Description: Now deleted items are assigned the status as follows:

- If the item was never synced and was marked as *Deleted*, then it is assigned the *Prepared* status.
- If the item was previously synced and then marked as *Deleted*, then it is assigned the *Prepared* status only if it was changed in the primary system. If the item was changed in the other system, it keeps the *Deleted* status.
- If the item has been filtered or is invalid, it is assigned the *Filtered* or *Invalid* status, respectively.

AC-229579: Previously, if a sales order had an invoice or invoices prepared, the e-commerce connector could not apply a payment to the invoices during the sync. In the current version, the logic has been enhanced as follows to minimize the sync failure:

- If the sales order has the *Open* status, the payment will be applied to the sales order.
- If the sales order has the *Canceled* status, the payment will be applied to the sales order.
- If the sales order has the *Open* status and the unbilled amount equal to zero, the payment will be applied to the available invoice.

AC-232296: Multiple changes have been made to support asynchronous operations in the retail-commerce connector to improve the performance of synchronization. All main connector methods have been converted to asynchronous. Customization projects that used the previous version of these methods must be updated.

AC-235535: If an item has been synchronized with an external system and then its stock status changes (that is, a non-stock item is converted to a stock item on the *Non-Stock Items (IN202000)* form or a stock item is converted to a non-stock item on the *Stock Items (IN202500)* form), the item's synchronization record is assigned the entity type matching the new stock status (*Stock Item* or *Non-Stock Item*) and its synchronization status changes to *Prepared*.
Additionally, if a *Product Availability* synchronization record exists for a stock item, the system deletes it when the stock item is converted to a non-stock item.

AC-235747: On the *Entities (BC202000)* form, it is now possible to use the `Email` field in filtering conditions for the *Customer* entity, for example, to exclude customers without an email address from synchronization. The *Email* option has been added to the **Source Field / Value** columns for the *Customer -> Main Address* source object.

AC-238162: Previously, when on the *Store Settings (BC201010, BC201000)* form, *Credit Card* payment methods were configured on the **Payment Settings** tab, it was easy to make an error. In the current version, the following types of extra validation have been added:

- If the processing center is specified for the *Credit Card* payment methods
- If the **Integrated Processing** check box is selected for the payment method on the **Settings for Use in AR** tab of the *Payment Methods (CA204000)* form and a processing center is linked to the payment method and activated on the **Processing Centers** tab of the *Payment Methods* form
- If the **Enable Integrated CC Processing** check box on the **General** tab of the *Accounts Receivable Preferences (AR101000)* form is selected
- The processing center is selected in the mapping of the ERP payment method.
  For card-based payment methods, the **Create Payment from Order** check box is cleared and unavailable.
- For payment methods that have the means of payment other than *Credit Card*, if a processing center is selected in the mapping

AC-240982: If on the *Invoices (SO303000)* form, the **Address Line 2** box was empty in the **Ship-To Address** and **Bill-To Address** sections of the **Addresses** tab, empty lines were displayed in the printed version of the SO invoice.

Integrations

AC-127272: On the **Plug-In Parameters** tab of the *Tax Providers (TX102000)* form, the *LOGTRACE* parameter has been added. If the check box is selected for the parameter, the system saves the requests and responses of web calls related to the tax provider to the trace log.

AC-146740: The **Validate Address** command on various forms did not update the addresses as required and displayed the right address over a warning instead.
Fix Description: When the *Address Validation Integration* feature is enabled on the *Enable/Disable Features (CS100000)* form, a built-in address provider, such as *Avalara* or *Vertex*, is selected as the address provider, and the **Override Address Automatically** check box is selected for a country on the *Countries/States (CS204000)* form, then clicking **Validate Address** overrides the existing address and replaces it with the correct address.

AC-154413: On the *Invoices and Memos (AR301000)* form, for calculating taxes for a drop-ship purchase order, the system now uses the customer's ship-to address from the *Sales Orders (SO301000)* form instead of the vendor's address from the *Purchase Orders (PO301000)* form.

AC-166974: The system now allows users to modify the length, width, and height of the packages on the *Shipments (SO302000)* form, in the **Shop for Rates** dialog box of the *Sales Orders (SO301000)* form, and on the *Pick, Pack, and Ship (SO302020)* form in Ship mode.

AC-200627: When a shipment was created with a package box that had zero weight, EasyPost showed the following error message: *Wrong parameter type*. Because there was no way to change the error message handled by EasyPost, the issue was addressed to the EasyPost integration in Acumatica.

AC-201763: On the *Stock Items (IN202500)* form, on the **Packaging** tab, in the **International Shipping** section, the **Tariff Code** box has been renamed to **Commodity Code**, and the new **Commodity Code Type** box has been added. In the **Commodity Code Type** box, a user can specify the commodity code types of the stock items. The commodity code types are available in the list and are the following: *HS, HTS, HSN, NCM, UNSPSC,* and *Service*. Because the **Tariff Code** box was used to store HS codes (6-digit tariff codes that comply with the Harmonized System of tariff nomenclature standardized by the World Customs Organization), during the upgrade, all the existing values that have been entered in this box before the upgrade will be assigned the *HS* type (that will be specified in the **Commodity Code Type** box).
The **Commodity Code Type** and **Commodity Code** boxes have also been added to the **Packaging** tab of the *Non-Stock Items (IN202000)* form to store the commodity codes of the non-stock items.

AC-210760: Vertex Geolocation is the new functionality implemented in Acumatica ERP 2022 R2, which allows a user to enter the geo-coordinates in the **Latitude** and **Longitude** boxes on the **Shipping** tab of the *Shipments (SO302000)* form in order to specify the needed geographical location. With this functionality enabled, the system determines the taxes applicable to the location defined by the specified coordinates, and uses them to calculate tax amounts. This functionality is applicable to all Acumatica ERP forms where the taxes are used. To turn on the functionality, a user should enable the *External Tax Calculation Integration* feature on the *Enable/Disable Features (CS100000)* form.
Limitations: If the geo-coordinates are specified in the **Latitude** and **Longitude** boxes on the **Shipping** tab of the *Shipments (SO302000)* form, the **Confirm Shipment** command cannot be processed successfully because the carriers require the valid ship-to information to be specified in the **Address Line 1**, **Postal Code** and **City** boxes of the **Shipping** tab.

AC-229787: On the *Shipments (SO302000)* form, if a shipment had multiple packages and ShipEngine was used as a carrier service, multiple shipment label requests were sent to the service instead of combining all the packages of the shipment for applicable carriers, such as Fedex or UPS into a single request. As a result, customers were charged for every request that was sent to the carrier service.

AC-243073: If the *UPS* carrier was configured on the *Carriers (CS207700)* form, the *UPS Standard* code was

configured on the *Ship via Codes (CS207500)* form, and a user selected a shipment on the *Pick, Pack, and Ship (SO302020)* form, clicking **Get Return Label** did not create return labels for the respective package in the shipment. Also, clicking **Confirm Shipment** on the *Shipments (SO302000)* form for the same shipment resulted in an error.
Workaround: Please find the solution in this knowledge base article.

Service Management

AC-161938: The cost of a non-stock or stock item (without lot/serial number tracking) in a service order or appointment was not updated from a purchase order if the purchase order was created from the service order or appointment and the cost of the item was changed on the *Purchase Orders (PO301000)* form.

AC-195455: On the *Appointments (FS300200)* form, if an appointment was deleted, and it was the only appointment associated with a service order, then the service order was deleted as well.
Workaround: On the *Appointments* form, cancel the appointment instead of deleting.

AC-213229: When a user tried to search a billing document (such as an SO invoice) generated from an appointment by using the invoice's reference number in the Search box in the top pane of the Acumatica ERP screen, the search results could be empty.

AC-219408: If an appointment was created from a service order on the *Service Orders (FS300100)* form, the pop-up note added to the customer on the *Customers (AR303000)* form was not shown on the *Appointments (FS300200)* form.

AC-220477: If on the *Expense Claims (EP301000)* form, a user modified an expense claim linked to an expense receipt by changing the inventory ID details, then on the *Expense Receipt (EP301020)* form, the system reset the values in the **Field Service Details** section of the **Details** tab (in the **Related Svc. Doc. Type** and **Related Svc. Doc. Nbr.** boxes), and the expense receipt did not display the link to the appointment or the service order.

AC-221119: If on the **Details** tab of the *Appointments (FS300200)* form, a user added items and put the appointment on hold, the rows became non-editable.

AC-226569: If on the *Shipments (SO302000)* form, a user tried to prepare an invoice for replacing a component of an existing model equipment, the following error occurred: *Component Line Nbr. '00002' cannot be found in the system.*

AC-226817: In some cases, users experienced a significant delay and the page time-outs when they attempted to start some appointments.

AC-227869: In the Acumatica ERP mobile app, the ability to add an expense receipt to an appointment by recognizing a photo of the paper receipt has been added.
The following new commands have been added to the **Details** tab of the *Appointments* screen:

- **Capture Expense Receipt**: Allows a user to take photo of a receipt
- **Select from Gallery**: Allows a user to select an existing photo from the gallery

When a user confirms the selection, a new expense receipt is created and linked to the appointment automatically.

AC-238480: In the mobile app, the **Appointments List** tab on the *Services* screen was renamed to **Appointment List**.