

# Consultant Course

👤 **System Administration**

## S100 System Installation and Maintenance 2025 R1

Revision: 5/9/2025

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Software Version: 2025 R1

Last Updated: 05/09/2025

# How to Use This Course

This course provides a set of lessons that illustrate the Acumatica ERP installation processes in a midsize company. The course consists of lessons that guide you step by step through the examples and explanations of the installation and maintenance processes in Acumatica ERP. After you complete this course, you can proceed with the Acumatica ERP implementation, as described in [Preparing an Instance for Implementation](#).

## What Is in This Guide

The guide includes the *Company Story* topic and configuration and process activities. The *Company Story* topic explains the organizational structure of the company for which you will install the Acumatica ERP Configuration wizard, deploy and maintain the Acumatica ERP application instances. Each of the configuration and process activities of the course is dedicated to a particular user scenario and consists of processing steps that you complete.

## What Is in a Configuration Lesson

A *configuration lesson*—that is, a lesson dedicated to the configuration of system settings and entities—provides a brief overview of the required system configuration and a description of other settings that could affect the configuration workflow.

## What Is in a Process Lesson

A *process lesson*—that is, a lesson dedicated to the performing of a particular business process—includes a brief user scenario and a description of the process workflow. It can also include process diagrams that illustrate the user scenario supported by this process. The lesson also provides a brief overview of the settings that need to be specified and the entities that need to be prepared in the system before you start to perform this business process.

Each process lesson includes at least one process activity that you have to complete in your Acumatica ERP instance to learn how to perform the described business process.

## What Is in a Lesson?

Each lesson provides a story describing a particular user scenario; configuration settings that are related to the described scenario are also listed. The lesson provides a brief overview of the process that should be performed to complete the described scenario, and instructions that guide you through the process in Acumatica ERP.



The completion of a lesson depends on the steps performed in the previous lessons. We recommend that you complete the lessons in the listed order.

## What the Documentation Resources Are

Acumatica ERP provides a wide variety of documentation resources, which you can access from this course, from the system, or from the [Help portal](#). Links to related information are provided at relevant places throughout the course. The complete Acumatica ERP documentation is available on <https://help.acumatica.com/> and is included in the Acumatica ERP instance.

While viewing any form used in the course (or any other Acumatica ERP form), you can click the **Open Help** button in the top pane to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related concepts and activities and to open a reference topic with detailed descriptions of the form elements.

## Which Credentials You Should Use

For lessons of this course in which you sign in to an Acumatica ERP instance, you sign in by using the *admin* username and the password defined for this account in your instance.

## Which License You Should Use

For the educational purposes of this course, you will activate an Acumatica ERP license to access the functionality associated with the *Inventory and Order Management* group of features.

For the production use of this functionality, you have to activate the license your organization has purchased. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP sales policy for details.

# Company Story

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This topic explains the organizational structure and operational activity of the midsize company for which you will install the Acumatica ERP Configuration wizard, deploy and maintain Acumatica ERP instances during this training.

## Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- SweetLife Head Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- SweetLife Store: This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- SweetLife Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

## Operational Activity

The company has been operating starting in the 01-2024 financial period. In November 2024, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. The equipment center began its operations in 01-2025 in response to the company's growth.

The base currency of the company and its subsidiaries is the US dollar (USD). All amounts in documents and reports are expressed in US dollars unless otherwise indicated.

## SweetLife Company Sales and Services

Each SweetLife company's branch has its own business processes, as follows:

- SweetLife Head Office and Wholesale Center: In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- SweetLife Store: In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- SweetLife Service and Equipment Sales Center: This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

## Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For

the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors.

The company also purchases juicers and juicer parts from large juicer vendors, and it either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

# Lesson 1: Preparing for Installing Acumatica ERP

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In this lesson, you will learn about the Acumatica ERP installation and deployment options, the system requirements, and the required configuration of the operating system where the server part of the system will be installed. Once you complete this lesson, the server part of the Acumatica ERP system will be ready for installation.

## Preparation for the Acumatica ERP Installation: General Information

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Acumatica ERP is a web application that users can access from any computer by using a web browser. This web application (the website) interacts with the application server and the database that stores all the data.

You can install Acumatica ERP if your system meets the minimal hardware and software requirements and the installation environment is set up properly.

This lesson provides an overview of the installation and deployment options, system requirements, and environment settings required for the Acumatica ERP installation.

## Learning Objectives

In this lesson, you will do the following:

- Become familiar with the possible deployment configurations of Acumatica ERP
- Recognize the minimum system requirements for installing Acumatica ERP
- Review the settings of your system environment before the Acumatica ERP installation

## Applicable Scenarios

You may need to learn how to install Acumatica ERP if you are a new implementation consultant who needs to install Acumatica ERP for a customer and learn how to set up the system.

## Installation Options

Depending on the company's preferences and requirements, there are three primary options for deploying Acumatica ERP:

- Local, on-premises installation: The company is responsible for the infrastructure (hardware, system software, communication hardware, and software on user devices) and the deployment of the application software (implementation, support, and upgrading).
- Installation in a data center: The service provider manages all or most of the infrastructure that the company uses. If the service company provides the company with a web service where you can launch an operating system with Microsoft SQL Server available, the installation procedure will be the same as it is with a local installation.
- Installation on the Windows Azure platform: The company is responsible for the infrastructure and the deployment of the application software. For details, see [Installing Acumatica ERP in a Data Center](#).

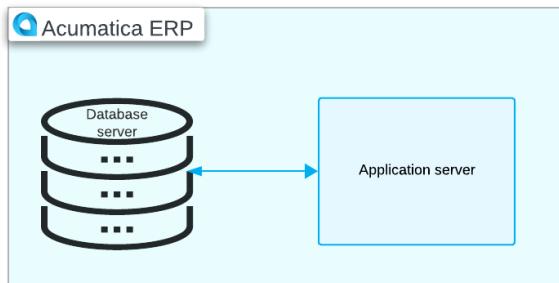
For more information about system requirements for deploying Acumatica ERP, see [System Requirements for the Acumatica ERP Installation](#).

## Deployment Configurations

You can deploy Acumatica ERP in various configurations of application and database servers.

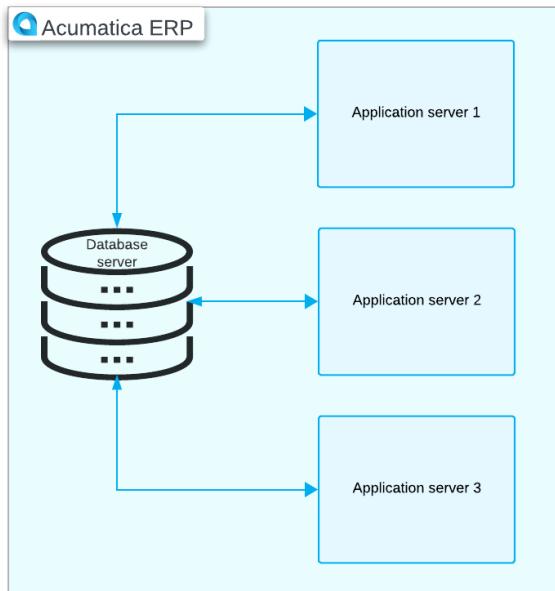
The following diagram shows the recommended configuration with application and database servers installed on separate virtual or physical machines.

#### One application server and one database server



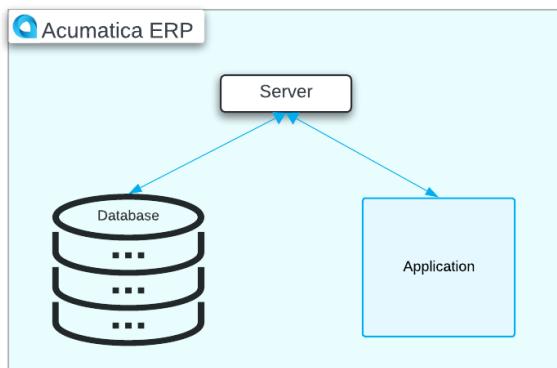
The following diagram shows a scalable configuration with multiple application servers and one database server. This configuration is designed to handle increased workload demands.

#### Multiple application servers and one database server



The following diagram shows a configuration where one server hosts both the application and the database. This setup is commonly used for development, testing, and training purposes.

### One server with hosted application and database



## System Requirements for the Acumatica ERP Installation

An Acumatica ERP system consists of the following parts: the web interface, the server part, and the database. For each of these parts to work properly, the environment where you install and use Acumatica ERP should meet particular requirements, which are described in this topic.



Before you start the installation process, install at least all critical updates (or, preferably, most of the recent updates) for the operating system and the required software. You should also make sure that all required third-party components listed in this topic are properly installed and configured on your computer.

### Workstations

The workstations that are used by the employees of your organization to work with Acumatica ERP should meet the hardware and software requirements listed in the following table.

Hardware/Software	Requirements
Display resolution	<ul style="list-style-type: none"> <li>Minimum 1024 x 768</li> <li>Typical 1920 x 1080</li> </ul>
Adobe Acrobat Reader (to open Acumatica ERP PDF documents)	2022 or later
Microsoft Office (to view documents exported from Acumatica ERP)	<ul style="list-style-type: none"> <li>Office 365</li> <li>2021</li> <li>2019</li> <li>2016</li> </ul>
Web Browsers	
Microsoft Edge	120 or later

Hardware/Software	Requirements
Mozilla Firefox	130 or later
Apple Safari	17 or later
Google Chrome	120 or later

## Server Environment

The environment where you install the server part of Acumatica ERP should meet the hardware and software requirements listed in the following table.

Hardware/Software	Requirements
Operating systems	<ul style="list-style-type: none"> <li>Windows Server 2022 64-bit edition</li> <li>Windows Server 2019 64-bit edition</li> </ul> <div style="border: 2px solid orange; padding: 10px;">  You can install the server part of Acumatica ERP on non-server operating systems, such as Windows 10 64-bit edition, and Windows 11 64-bit edition, but only for testing purposes. For production, you must use a server operating system.       </div>
Microsoft .NET Framework	4.8
Microsoft Internet Information Services	10 <div style="border: 2px solid orange; padding: 10px;">  You must set <b>Enable 32-bit Applications</b> to <i>False</i> in the IIS settings. Acumatica ERP 2025 R1 supports only the Integrated mode of the application pool. Classic mode is not supported. If you try to upgrade an earlier version of Acumatica ERP with Classic mode of the application pool to 2025 R1, the upgrade will not be performed, and a corresponding error message will be displayed.       </div>
Memory	16 GB RAM
CPU	2 cores; 3.5 GHz
Hard disk space	1 GB available hard disk space, plus 200 MB for each additional instance of Acumatica ERP

## Database

You can find the system requirements for the Acumatica ERP database in the following table.

Hardware/Software	Requirements
Microsoft SQL Server	<ul style="list-style-type: none"> <li>2022</li> <li>2019</li> </ul>

Hardware/Software	Requirements
MySQL Community Server	8.0 64-bit edition
Memory	8 GB RAM
CPU	2 cores; 2 GHz
Hard Disk Space	For each database, 1 GB available hard disk space; depending on the number of transactions, additional hard disk space may be required to store large numbers of transactions

## Preparation for the Acumatica ERP Installation: System Environment

Before proceeding with the installation of Acumatica ERP, make sure that the environment configuration on the computer where you plan to install the server software part of Acumatica ERP is properly set up.

This topic provides an overview of the configuration of Internet Information Services (IIS) web server features, the specification of HTTPS settings, and the installation of semantic search for Microsoft SQL Server.

### Configuration of IIS Web Server Features

You need to ensure that the system configuration is suitable for installing the Acumatica ERP server part and that the following features are enabled on the IIS web server:

- **Internet Information Services > Web Management Tools > IIS Management Console**
- **Internet Information Services > World Wide Web Services > Application Development Features:**
  - .NET Extensibility 4.8
  - ASP.NET 4.8
  - ISAPI Extensions
  - ISAPI Filters
  - WebSocket Protocol
- **Internet Information Services > World Wide Web Services > Common HTTP Features:**
  - Default Document
  - Static Content
- **Internet Information Services > World Wide Web Services > Performance Features:**
  - Dynamic Content Compression
  - Static Content Compression
- **Internet Information Services > World Wide Web Services > Security > Request Filtering**



Make sure that for each application pool you are planning to use with Acumatica ERP, the **Enable 32-bit Applications** parameter is set to *False* (the setting is located on the **IIS Manager > Application Pools > Edit Application Pool > Advanced Settings** menu).

In this course, we will use the *DefaultAppPool* application pool.

## Setting Up HTTPS in an IIS Web Server

When configuring your computer's environment, you need to ensure that HTTPS is being used. HTTPS is a secure communication protocol that encrypts the data exchanged between a client computer and a server, ensuring its security during transmission. This secure connection is essential for various functionality within your system.

The use of HTTPS makes it possible for users to export data from Acumatica ERP to Microsoft Excel spreadsheets, facilitating automatic updates of the data. Additionally, HTTPS is required for the implementation of single sign-on (SSO) to Acumatica ERP, which provides users with the ability to access the system seamlessly with their Google or Microsoft accounts.

You need to enable the TLS protocol to establish HTTPS connections in the IIS web server. To do this, you obtain a certificate from a certification authority and then register it with the IIS web server. This certificate is used to encrypt and decrypt the information transferred over the network, ensuring secure communication between the client and the server. For details on enabling the TLS protocol, refer to the IIS documentation.



Acumatica ERP does not support self-signed certificates.

## Enabling Semantic Search for Microsoft SQL Server

Acumatica ERP provides the full-text search functionality with the following capabilities within your instances:

- Performing semantic searches within SQL databases
- Identifying key phrases in text or documents
- Uncovering similar or related documents
- Offering insights into document similarities or relations

You can use this functionality if semantic search is enabled in Microsoft SQL Server.



Semantic search is not enabled by default in Microsoft SQL Server, while in MySQL Server, the semantic search functionality is enabled by default.

If semantic search is not already installed, you can easily add it by installing an update and selecting this feature under **Database Engine Services**. To install semantic search, go to the **Features to Install** page during Microsoft SQL Server setup and select **Full-Text and Semantic Extractions for Search**. For details, see the documentation for Microsoft SQL Server.

## Preparation for the Acumatica ERP Installation: Implementation Activity

In this implementation activity, you will learn how to enable the required Internet Information Services (IIS) web server features and validate the configuration of IIS. This will prepare you to install the server component of Acumatica ERP.



For training and testing purposes, you can install the server part of Acumatica ERP on operating systems that are not server operating systems. The instructions in this activity demonstrate the verification of the IIS web server features and the application pool settings on a computer running Windows 11. If you are using other supported environments and have trouble finding the required features, refer to the corresponding documentation for instructions.

## Story

Suppose that you are the system administrator of the SweetLife Fruits & Jams company, and you need to verify the system environment prior to installing Acumatica ERP.

## Process Overview

In this activity, you will do the following:

1. Enable the required IIS web server features
2. Verify the configuration of the IIS

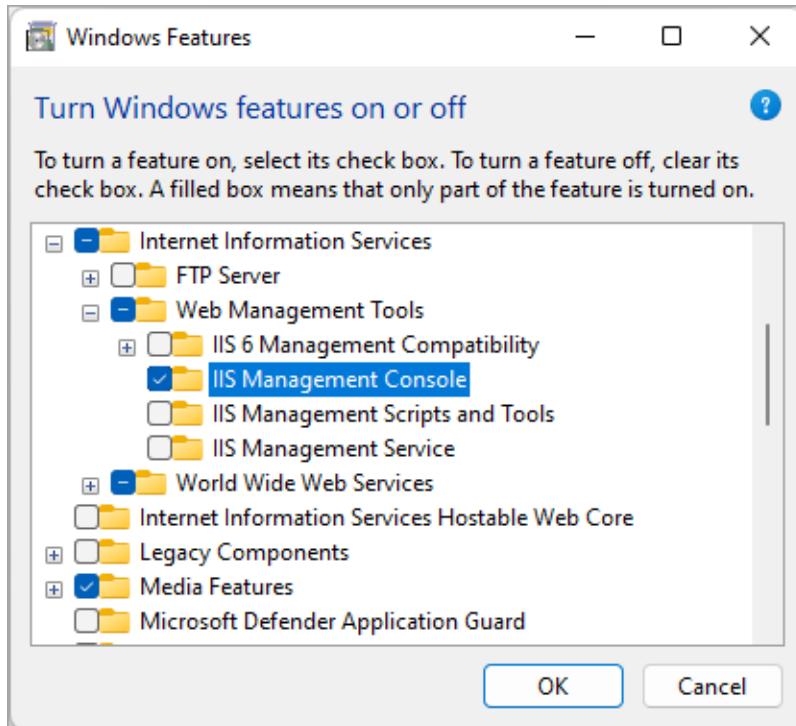
### Step 1: Enabling the IIS Management Console Feature

To enable the IIS Management Console feature, do the following:

1. On the taskbar, click Start to open the Start menu, which contains all your apps, settings, and files.
2. On the Start menu, type Windows Features.
3. Click **Turn Windows features on or off**. The **Windows Features** dialog box opens.
4. Go to **Internet Information Services > Web Management Tools**.
5. Select the **IIS Management Console** check box, as shown in the following screenshot.



If the check box is already selected, go to Step 2.

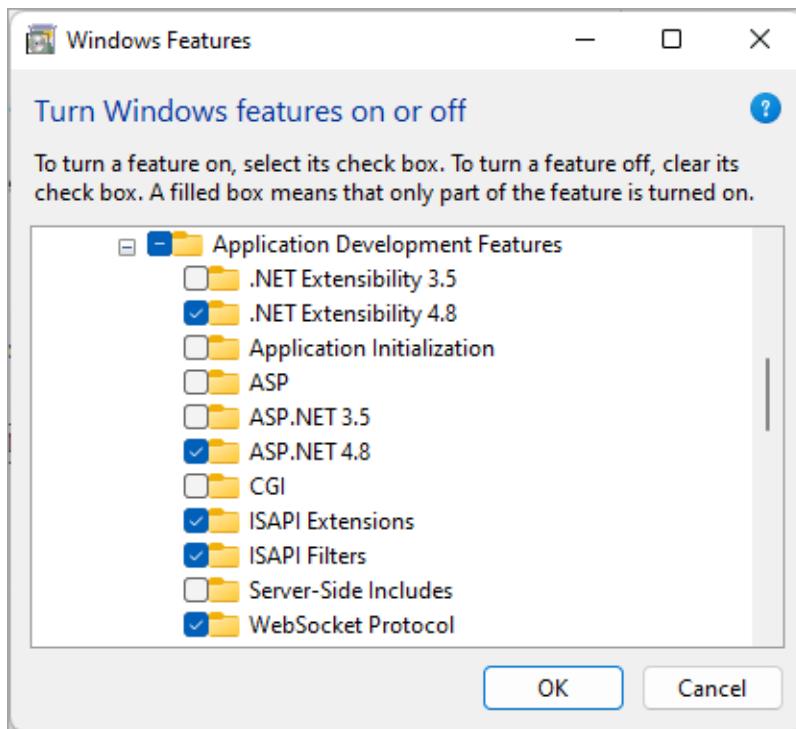


*Figure: The IIS Management Console feature*

## Step 2: Enabling World Wide Web Services Features

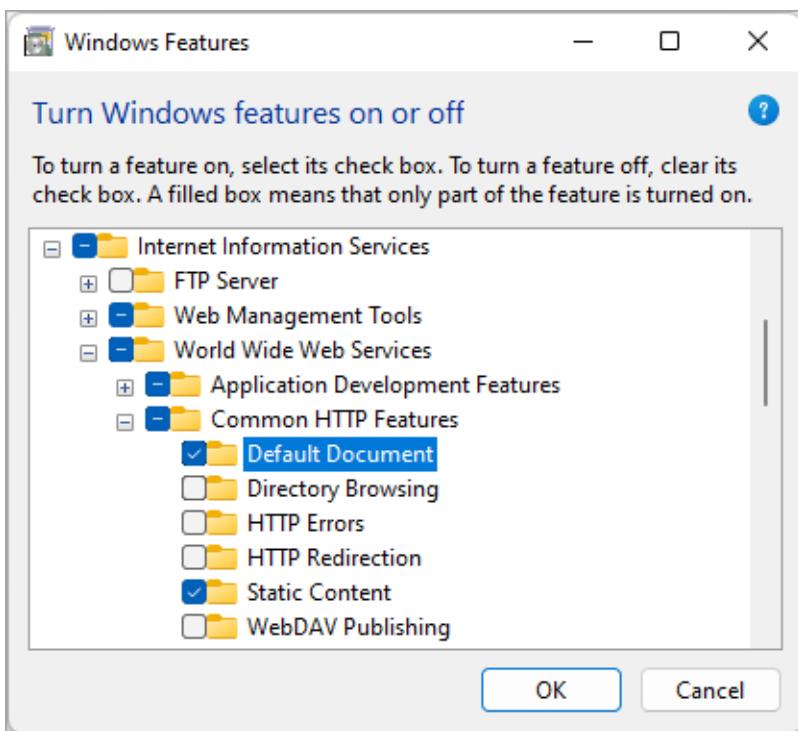
To enable various features that are included in the **World Wide Web Services** group of features, do the following:

1. While you are still viewing the **Windows Features** dialog box, go to **Internet Information Services > World Wide Web Services > Application Development Features**.
2. Select the following check boxes (as shown in the screenshot below):
  - **.NET Extensibility 4.8**
  - **ASP.NET 4.8**
  - **ISAPI Extensions**
  - **ISAPI Filters**
  - **WebSocket Protocol**



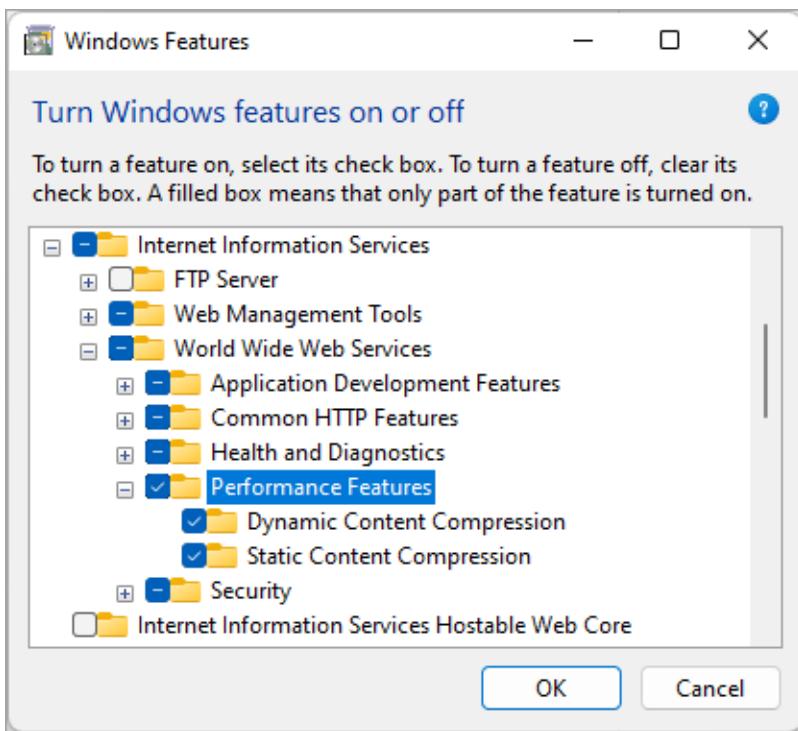
*Figure: Enabling of the Application Development Features*

3. Go to **Internet Information Services > World Wide Web Services > Common HTTP Features**.
4. Select the following check boxes (as shown in the screenshot below):
  - **Default Document**
  - **Static Content**



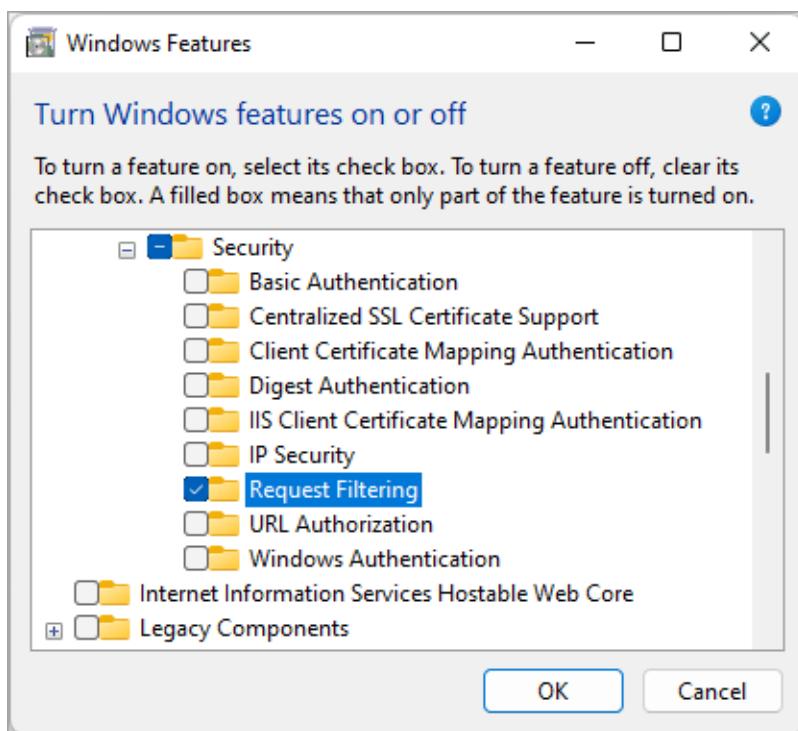
*Figure: Enabling of the Common HTTP Features*

5. Go to **Internet Information Services > World Wide Web Services > Performance Features**.
6. Select the following check boxes (as shown in the screenshot below):
  - **Dynamic Content Compression**
  - **Static Content Compression**



*Figure: Enabling of the Performance Features*

7. Go to **Internet Information Services > World Wide Web Services > Security**.
8. Select the **Request Filtering** check box (as shown in the following screenshot).



*Figure: Enabling of the Request Filtering feature*

9. Click **OK**.



If you have turned on some features, Windows shows an informational message.

### Step 3: Configuring Internet Information Services

To configure Internet Information Services, do the following:

1. On the taskbar, click Start to open the Start menu and click search for **Internet Information Services (IIS) Manager**.
2. In the left **Connections** pane, click **Application Pools**.
3. In the middle pane, in the list of available application pools on the server, right-click the **DefaultAppPool** application pool, which you will use on your website, and select **Basic Settings**.
4. In the **Edit Application Pool** dialog box, which opens, make sure that the following settings are specified, as shown in the following screenshot:
  - **.NET CLR version:** A version configured for .NET Version 4.8



The version number of the .NET Framework does not necessarily correspond to the version number of the CLR it includes. .NET Framework version 4.8 includes CLR Version 4.

- **Managed pipeline mode:** *Integrated*
- **Start application pool immediately:** Selected

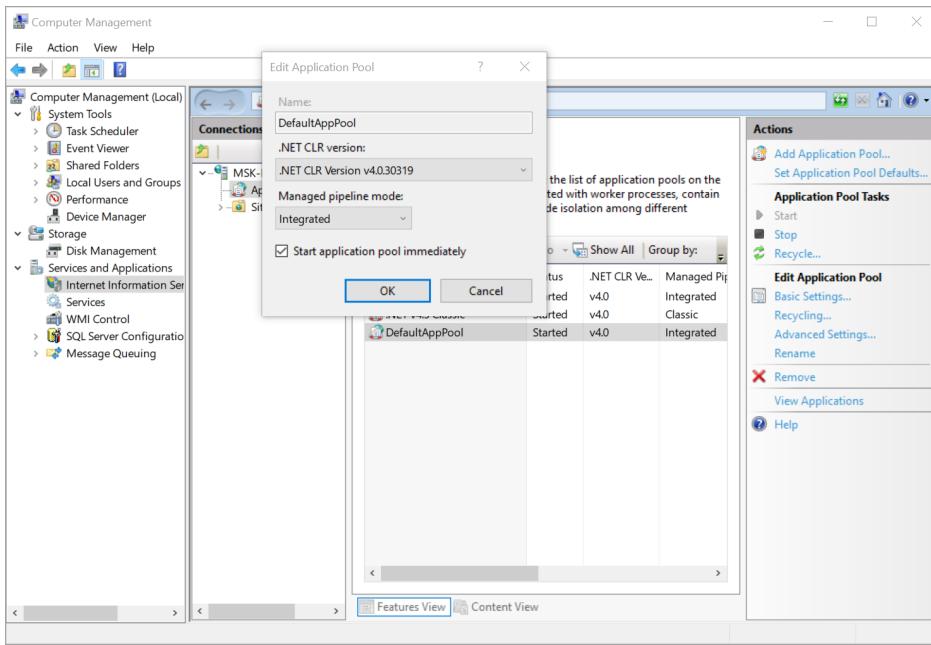


Figure: The settings of the default application pool



We generally recommend that you use a separate application pool for the Acumatica ERP production instance.

5. Click **OK** to close the dialog box.
6. While the **DefaultAppPool** application pool is selected in the middle pane, in the right **Actions** pane, click **Advanced Settings**.
7. In the **Advanced Settings** dialog box, which opens, make sure that *False* is selected as the value of the **Enable 32-Bit Applications** setting (as shown in the following screenshot).

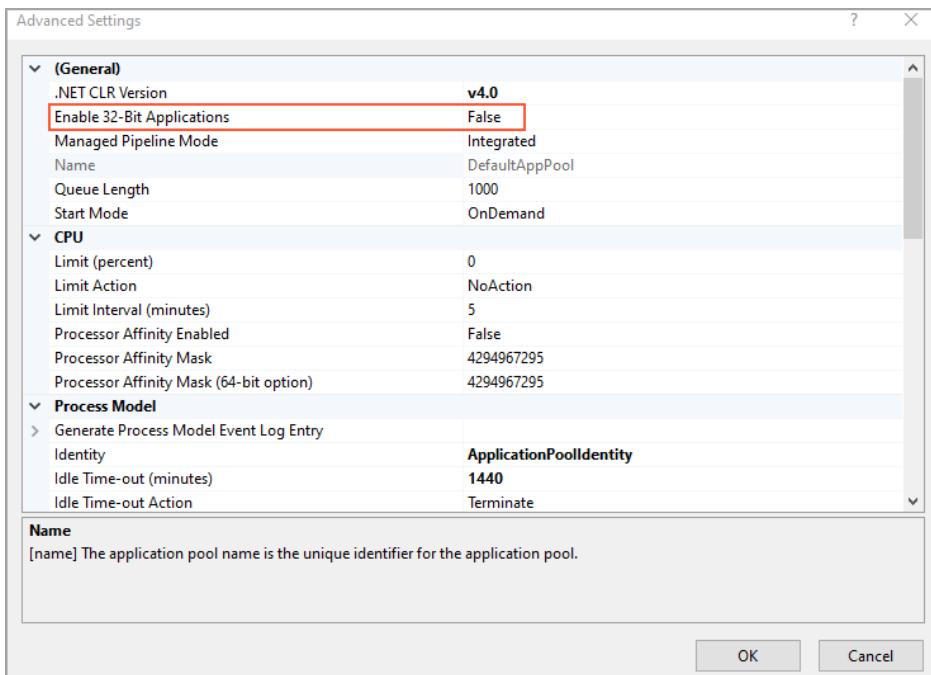


Figure: Advanced Settings of the DefaultAppPool

8. Click **OK** to close the dialog box.

You have verified the Internet Information Services (IIS) configuration and can proceed to installing Acumatica ERP.

# Lesson 2: Installing Acumatica ERP

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In this lesson, you will download and install the Acumatica ERP Configuration wizard. Once you complete this lesson, you will have this application installed on your computer, functioning as a server. Thus, you will be able to deploy the Acumatica ERP application instances.

## Acumatica ERP Installation On-Premises: General Information

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The installation of Acumatica ERP begins with installing the Acumatica ERP Configuration wizard on the server. You can install the Acumatica ERP Configuration wizard with or without the Acumatica ERP Tools.

This topic provides an overview of the Acumatica ERP Configuration wizard and the Acumatica ERP Tools. It describes their functionalities, capabilities, and installation processes.

### Learning Objectives

In this lesson, you will do the following:

- Become familiar with the Acumatica ERP Configuration wizard and its capabilities
- Recognize the Acumatica ERP Tools
- Obtain the Acumatica ERP installation package
- Install the Acumatica ERP Configuration wizard
- Optional: Install the Acumatica ERP Tools

### Applicable Scenario

You may need to learn how to install the Acumatica ERP Configuration wizard if you are an implementation consultant who needs to install the Acumatica ERP Configuration wizard.

### The Acumatica ERP Configuration Wizard

The Acumatica ERP Configuration wizard is the part of software that gives you the ability to deploy an Acumatica ERP application instance. The Acumatica ERP application instance is a website accessed by users in your company for daily tasks.

By using the Acumatica ERP Configuration wizard, you can do the following:

- Deploy multiple application instances
- Create additional tenants
- Perform application, database, and tenant maintenance
- Delete tenants and application instances

### Getting an Acumatica ERP Installation Package

The installation of the Acumatica ERP Configuration wizard is initiated through the installation package. You can find and download the latest version of the installation package from the [Acumatica Community](#) website. On the menu bar of the website, you can click **Product** and select the version of Acumatica ERP whose installation package you want to download. The link to the installation package contains a nine-digit build number that has the XX.XXX.XXXX format. You click the link and download the AcumaticaERPIinstall.msi Windows installer package.



You can download any of the previously released versions from the [builds.acumatica.com](http://builds.acumatica.com) website.

After you have downloaded the installation package, you can start installing the Acumatica ERP Configuration wizard.

## Installation of the Acumatica ERP Configuration Wizard

To install the Acumatica ERP Configuration wizard, you need to run `AcumaticaERPInstall.msi`, which you have downloaded on your computer.

The installation process will guide you through the Acumatica ERP Configuration wizard pages, on which you should perform the following actions:

1. Welcome page: This page opens when you run `AcumaticaERPInstall.msi`. To start the installation process, you should click **Next**.
2. End-User License Agreement page: On this page, you should read the license agreement, select the **I accept the terms in the License Agreement** check box, and click **Next**.
3. Main Software Configuration page: On this page, you can select the necessary software components (that is, the Acumatica ERP Tools) to install along with the Acumatica ERP Configuration wizard. By default, the **Install Acumatica ERP** and **Launch the Acumatica ERP Configuration Wizard** check boxes are selected. To proceed to the next page, you should click **Next**.
4. Destination Folder page: On this page, you should check the path to the default folder to which Acumatica ERP will be installed and change it, if needed. By default, the address of the folder is `C:\Program Files\Acumatica ERP\`. To proceed to the next page, you should click **Next**.
5. Confirmation page: On this page, you should click **Install** to install the Acumatica ERP Configuration wizard.

The Acumatica ERP software starts installing. When the installation process has been completed, you should click **Finish**.

The Acumatica ERP Configuration wizard is automatically started. You can also run the Acumatica ERP Configuration wizard anytime by selecting it on the Start menu.

## The Acumatica ERP Tools

Along with the Acumatica ERP Configuration wizard, the Acumatica ERP installation package includes the Acumatica ERP Tools, which consist of the following components:

- Acumatica Report Designer: This component provides visual tools that you can use to design custom reports. For more information, see [Acumatica Report Designer Guide](#).
- DeviceHub: This application is used to connect hardware devices, such as printers, scanners, and digital scales. You can also configure a set of default printers to streamline the printing of documents for users, regardless of the physical location of the users and printers. For detailed instructions on setting up hardware devices via DeviceHub, see [Implementing DeviceHub](#).
- Debugger Tools: The set of software components that gives you a basic ability to debug the deployed Acumatica ERP instances. For more information, see [To View and Debug Acumatica ERP Source Code](#).

You can install any of these components along with the Acumatica ERP Configuration wizard or at any later time.

If you have already installed the latest version of the Acumatica ERP Configuration wizard without the needed tool selected, you can install this tool in any of the following ways:

- Uninstall the Acumatica ERP Configuration wizard, and then install it with the tool that you need. For details, see [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard](#).



You can uninstall Acumatica ERP by using the standard Windows procedure. For more details, see [Uninstalling of Acumatica ERP: General Information](#).

- Modify the installation settings of Acumatica ERP and select the check box for the tool you need to install. For more details, see [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Tools \(Optional\)](#).

If the Acumatica ERP Configuration wizard, which you have already installed, is not the latest version, you can download and install the next version of it with the Acumatica ERP Tools.

## Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard

In this implementation activity, you will learn how to download an Acumatica ERP version and install the Acumatica ERP Configuration wizard.

### Story

Suppose that you, as the system administrator of the SweetLife Fruits & Jams company, need to download the Acumatica ERP 2025 R1 GA version and install the Acumatica ERP Configuration wizard for this version.

### Process Overview

In this activity, you will do the following:

1. Download the installation package for the needed version of Acumatica ERP
2. Install the Acumatica ERP Configuration wizard

### Step 1: Obtaining an Installation Package for a Specific Acumatica ERP Version

In this step, you will find the build for the Acumatica ERP 2025 R1 GA version and download it.

To find and download the needed Acumatica ERP build, do the following:

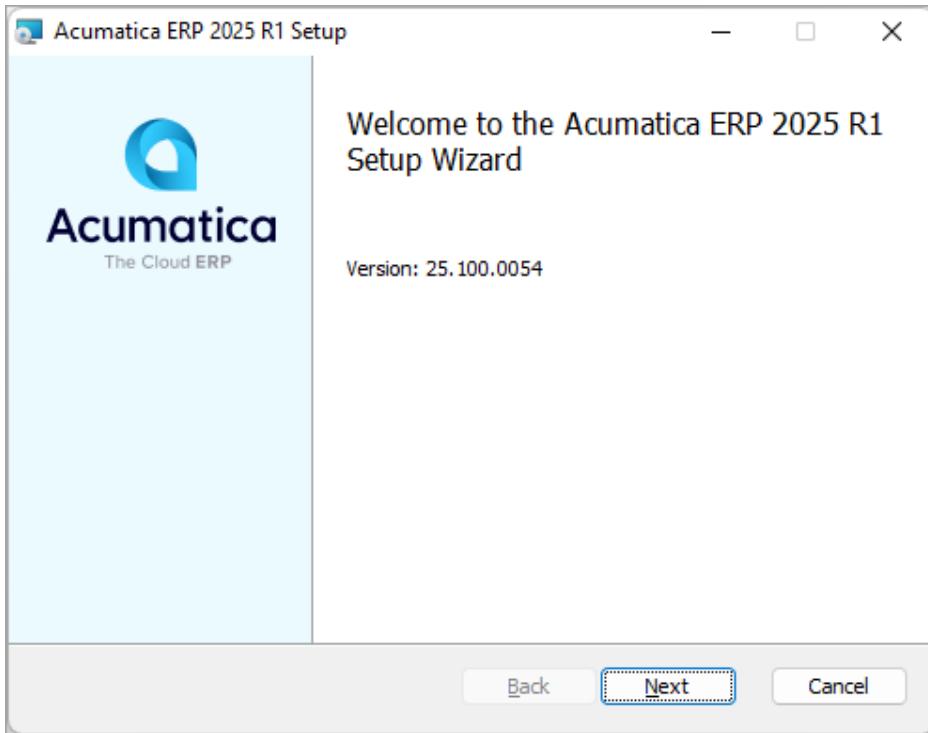
1. Open the [Acumatica Community](#) website.  
You will need your partner username and password to access the site.
2. On the **Product** menu on top of the page, click **2025 R1**.  
The Acumatica ERP 2025 R1 Downloads and Release Notes page opens. On this page, you can find the latest release and prior releases of the selected version; you can also read the release notes.
3. Click the *Show Content* link in the **Prior Releases** section.
4. Click the *Acumatica 2025 R1 GA Build XX.XXX.XXXX* link.  
The page with the release opens.
5. In the **Download Links** section, click the *Acumatica ERP 2025 R1 GA* link to download the AcumaticaERPInstall.msi Windows installer package.  
Wait until the package is downloaded to your computer.

### Step 2: Installing Acumatica ERP

In this step, you will install the Acumatica ERP Configuration wizard on your computer.

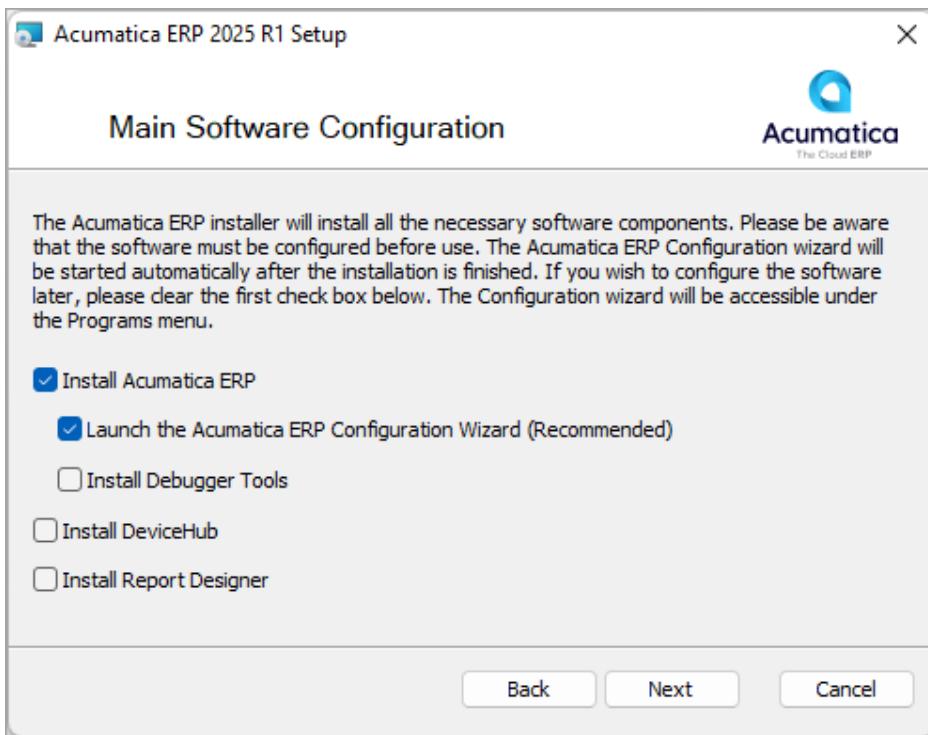
To install the Acumatica ERP Configuration wizard, do the following:

1. Run the AcumaticaERPInstall.msi file that you have downloaded in the previous step.
2. On the Welcome page of the Setup wizard, click **Next**, as shown in the following screenshot.



*Figure: The Welcome page of Acumatica ERP installer*

3. On the End-User License Agreement page, read the license agreement, and select the **I accept the terms in the License Agreement** check box.
4. Click **Next**.
5. On the Main Software Configuration page, which opens, notice that the **Install Acumatica ERP** and **Launch the Acumatica ERP Configuration Wizard (Recommended)** check boxes are selected by default, as shown in the following screenshot.



*Figure: Acumatica ERP components to be installed*



You can also select any of the following check boxes to install the Acumatica ERP Tools:

- **Install Debugger Tools**
- **Install DeviceHub**
- **Install Report Designer**

6. Click **Next**.
7. On the Destination Folder page, check the path to the default folder to which Acumatica ERP will be installed, and change it if needed.

By default, the address of the folder is C:\Program Files\Acumatica ERP\.

8. Click **Next**.
  9. On the confirmation page, click **Install** to install the Acumatica ERP Configuration wizard.
- Wait while the Acumatica ERP software is being installed.
10. When the installation process has completed, click **Finish**.

The Acumatica ERP Configuration wizard is started automatically. You can also run the Acumatica ERP Configuration wizard anytime by clicking it on the Start menu.

Now you can proceed with deploying the Acumatica ERP application instances.

## Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Tools (Optional)

The following activity will walk you through the process of installing the Acumatica ERP Tools separately from the Acumatica ERP Configuration wizard. The activity is optional for this course.

## Story

Suppose that you, as the system administrator of the SweetLife Fruits & Jams company, need to install the Acumatica ERP Tools when the Acumatica ERP Configuration wizard has already been installed.

## Process Overview

In this activity, you will install the Acumatica ERP Tools by modifying the Acumatica ERP installation settings on your computer.

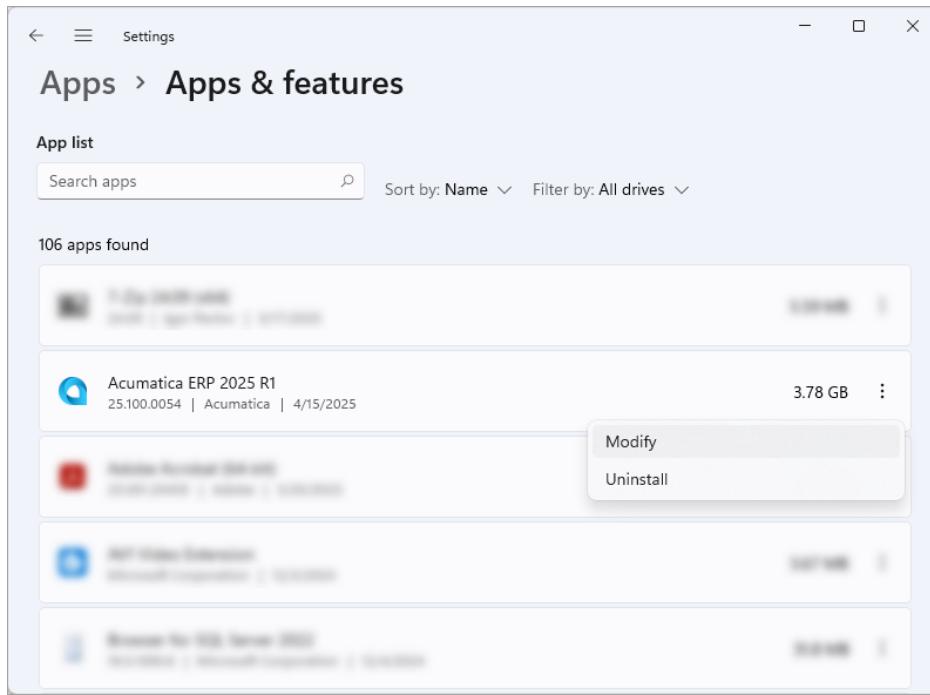
## System Preparation

Before you begin installing the Acumatica ERP Tools, as a prerequisite activity, make sure you have installed the Acumatica ERP Configuration wizard, as described in [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard](#).

## Step: Installing the Acumatica ERP Tools

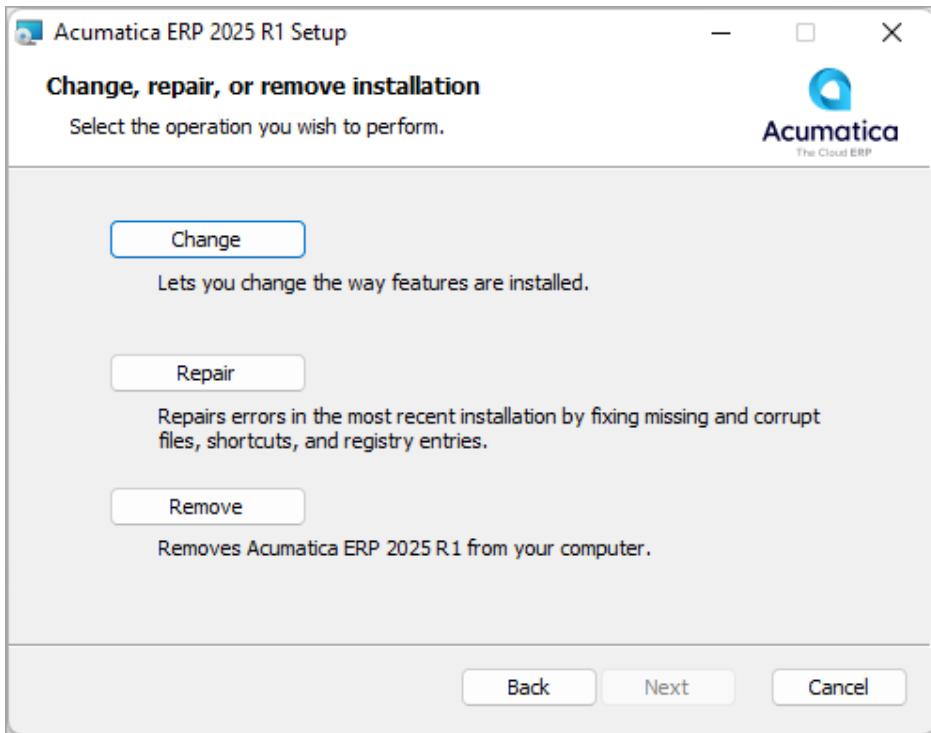
To install the Acumatica ERP Tools, do the following:

1. On the Start menu, click **Settings > Apps > Installed apps**.
2. In the list of installed applications, find Acumatica ERP 2025 R1, and click the **Modify** button, as shown in the following screenshot, which uses the Windows 11 interface as an example.



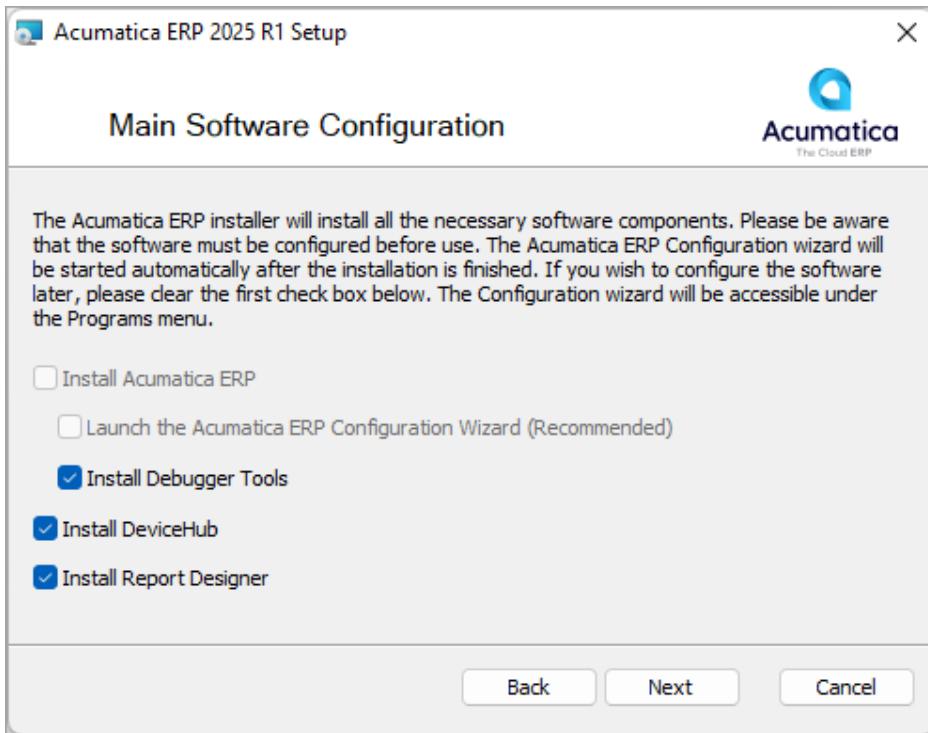
*Figure: The Apps & features page*

3. On the Welcome page of the Acumatica ERP 2025 R1 Setup wizard, which opens, click **Next**.
4. On the Change, Repair, or Remove installation page, click **Change** (see the following screenshot).



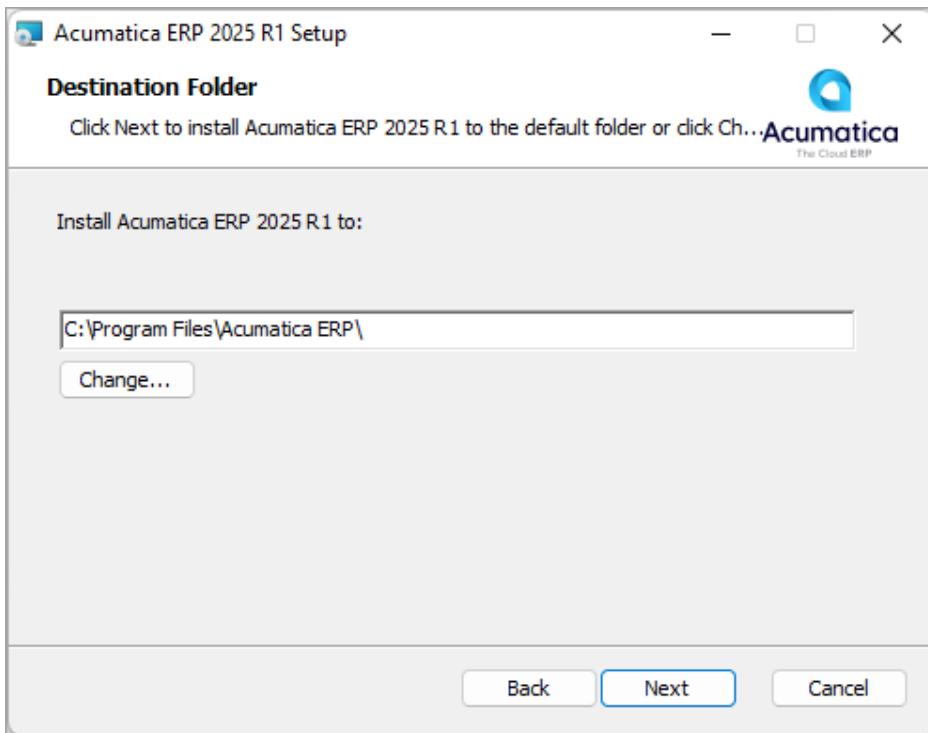
*Figure: The Change, Repair, or Remove installation page*

5. On the Main Software Configuration page, select any of the following check boxes for the Acumatica ERP tool installation (see the screenshot below):
  - **Install Debugger Tools:** Select this check box to install Debugger Tools.
  - **Install DeviceHub:** Select this check box to install DeviceHub.
  - **Install Report Designer:** Select this check box to install Acumatica Report Designer.



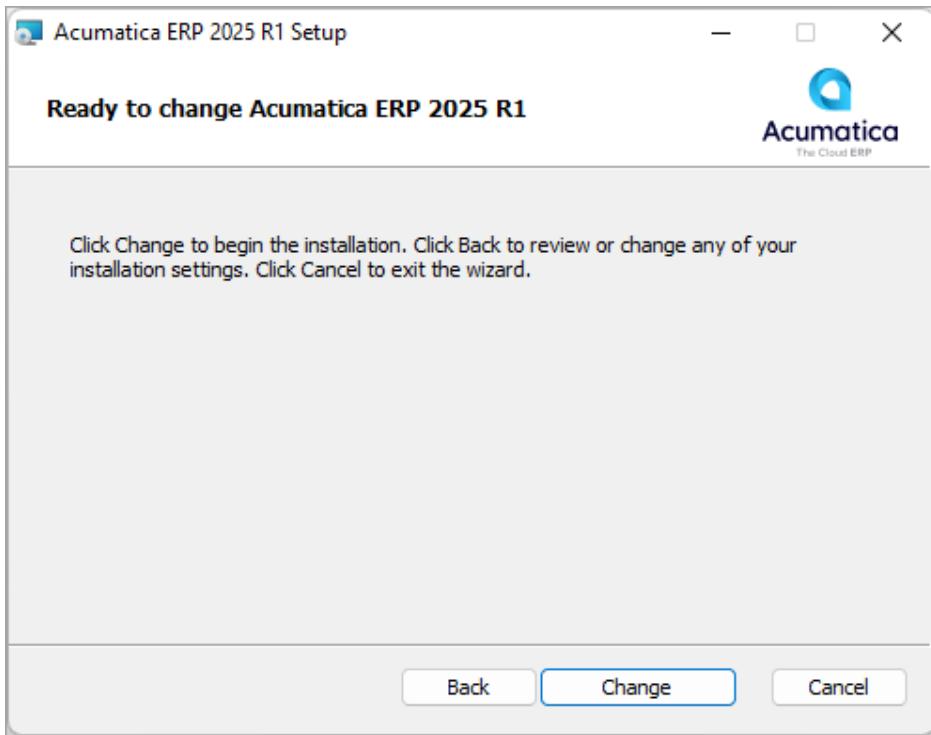
*Figure: The selection of the Acumatica ERP Tools*

6. Click **Next**.
7. On the Destination Folder page, specify the location where you want to install Acumatica ERP Tools, and then click **Next**, as shown in the following screenshot.



*Figure: The Destination Folder page*

8. On the Ready to Change Acumatica ERP 2025 R1 page, click **Change** (see the following screenshot).



*Figure: The Ready to Change Acumatica ERP 2025 R1 page*

9. After the tool installation has been completed, click **Finish**.

# Lesson 3: Deploying Instances

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In this lesson, you will learn how to deploy an Acumatica ERP application instance, sign in to Acumatica ERP for the first time, and activate an Acumatica ERP license.

Once you complete this lesson, you will have two instances installed on your computer. You sign in to one of these instances and perform further configuration.

## Instance Deployment: General Information

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You can deploy an application instance with one tenant or multiple tenants by using the Acumatica ERP Configuration wizard.

This topic provides an overview of an Acumatica ERP instance deployment, as well as tenant creation, and the possible combinations of instances, databases, and tenants.

## Learning Objectives

In this lesson, you will do the following:

- Become familiar with the possible deployment configuration of instances, tenants, and databases
- Review the process of deploying an instance
- Deploy an out-of-the-box instance
- Deploy an instance with a tenant with the demo data
- Change password before the first sign-in to the instance
- Activate the default set of features in the instance
- Activate the product license for the instance
- Review product license details

## Applicable Scenarios

You may need to learn how to deploy an Acumatica ERP application instance in scenarios that include the following:

- You are an implementation consultant who needs to deploy an Acumatica ERP application instance.
- You are a system administrator who needs to deploy an Acumatica ERP application instance for the employees of your company.

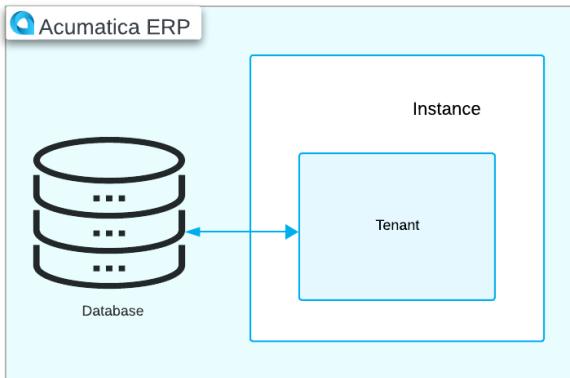
## Application Instances and Tenants

In Acumatica ERP, when you create an application instance, at least one tenant is defined. A tenant represents a separate company. It is not possible to configure an instance without a tenant.

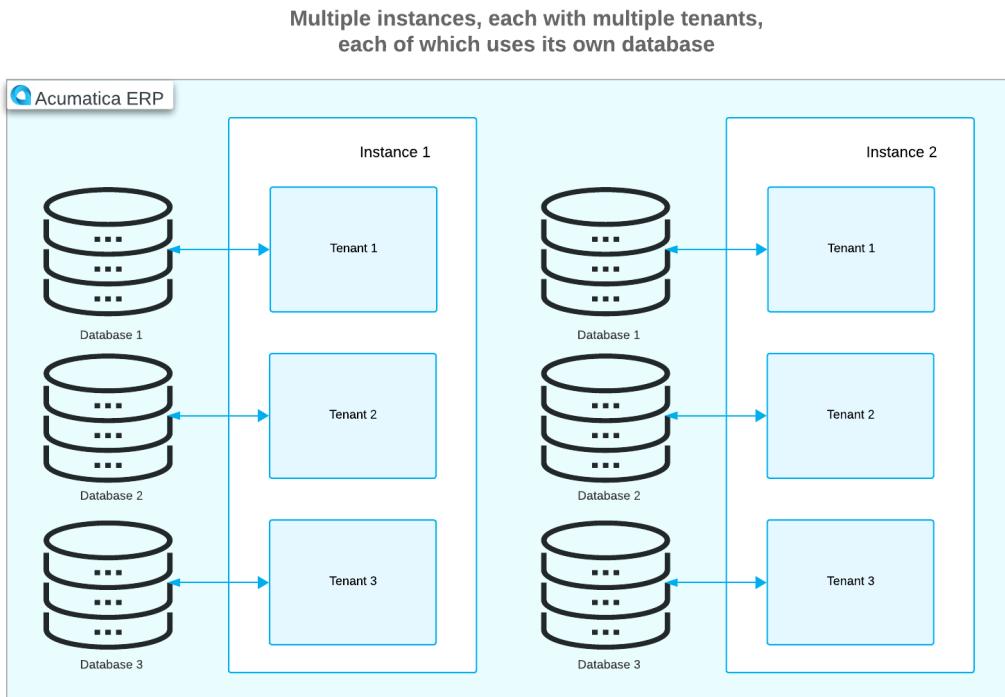
Acumatica ERP is an application with a multitenant architecture, making it possible for a single instance of the application to serve multiple tenants. You can deploy various combinations of instances, databases, and tenants depending on your company's business needs. These combinations are described below.

The following diagram shows an architecture with one application instance, one database, and one tenant.

One instance, one tenant, and one database

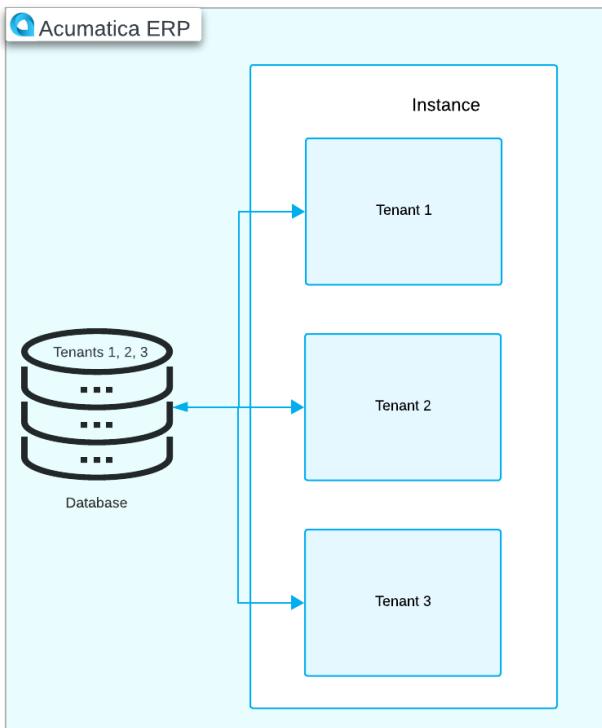


The following diagram shows an architecture with multiple application instances. Each instance has multiple tenants, and each tenant has its own database.



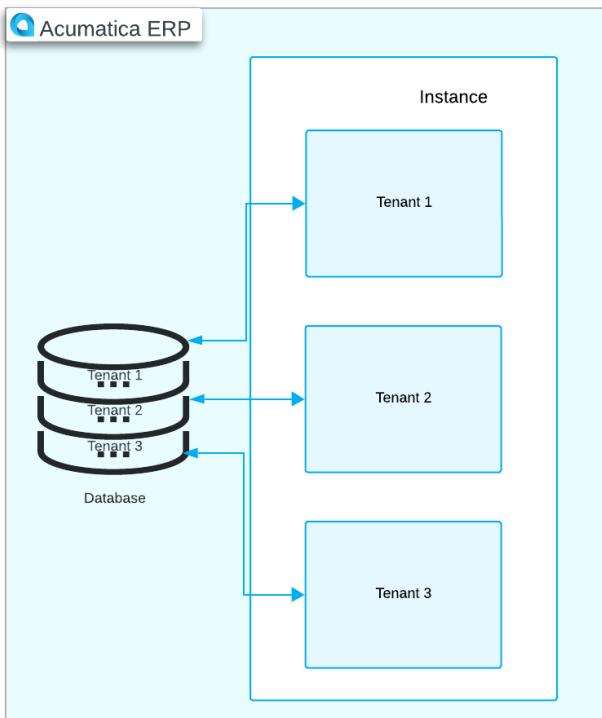
The following diagram shows an architecture with one application instance that has one database and multiple tenants with web access to the same database.

**One instance with multiple tenants and one database**



The following diagram shows an application instance with one database, where multiple tenants use the same database with completely isolated data. Although the application looks identical to all tenants, each tenant has exclusive access to only its own data.

One instance with multiple tenants and one database with isolated data for each tenant



You can deploy an instance with a tenant that does not contain any predefined data and represents an out-of-the-box company. You can also deploy a tenant that contains demo data that you can use for training purposes. For details, see [Instance Deployment: To Deploy an Out-of-the-Box Instance](#) and [Instance Deployment: To Deploy an Instance with Demo Data](#).

## Instance Deployment: Creation of an Instance

You can create a new Acumatica ERP instance by using the Acumatica ERP Configuration wizard, which you have installed on your computer. The procedure for creating an instance is described below.

You can start creating an instance by running the Acumatica ERP Configuration wizard, which you can find on your computer in any of the following ways:

- By clicking **Start > Acumatica > Acumatica ERP Configuration**
- By clicking **Search > Acumatica ERP Configuration**
- By opening the folder in which you have installed Acumatica ERP Configuration wizard. By default, the address of the folder is C:\Program Files\Acumatica ERP\. In the C:\Program Files\Acumatica ERP\Data folder, you can find and run the AcumaticaConfig.exe file.

The Welcome page of the Acumatica ERP Configuration wizard will open.

You can start the deployment of a new instance in one of the following ways:

- By clicking **Deploy a New Acumatica ERP Instance**.
- By clicking **Perform Application Maintenance**.

On the Application Maintenance page, which opens, you then click **Create** to proceed.



You can use this way if at least one Acumatica ERP instance has already been deployed.

The following sections provide an overview of the settings that you need to specify on the pages of the Acumatica ERP Configuration wizard to deploy a new instance.

## Database Server Connection Page

On this page, you should select the database server you want to use for a new instance and the server authentication method. You can do this by using the following UI elements:

- **Server Type:** Select the server type you want to use: *Microsoft SQL Server* or *MySQL Server*.
- **Server Name:** Type the name or address of the server machine.



For a MySQL server, the default port number is 3306. You can specify the custom port number after a comma.

- **Windows Authentication:** Select this option button if you want to use Windows authentication for connecting to the database server.
 

This method works only for a local Microsoft SQL Server or when both application and database servers are members of the same Windows domain.
- **SQL Server Authentication:** Select this option button if you want to use SQL Server authentication for connecting to the database server. You should also specify the username and password for an account with sufficient rights to create or modify databases.
- **Encrypt Database Server Connection:** Select this check box to require encryption from the server. This encryption secures the connection and protects transmitted data.

Note the following about selecting the authentication method:

- You must ensure that the selected authentication method is supported by the database server.
- Windows authentication does not work for MySQL Server.

## Database Configuration Page

On this page, you can either create a new database or connect to an existing one by selecting it from the list of available databases on the server. You should select one of the following option buttons:

- **Create a New Database:** Select this option button if you want to create a new database. You should also specify the name of the new database in the **New Database's Name** box. By default, the database name is *AcumaticaDB*, but you can change it.
- **Connect to an Existing Database:** Select this option button if you want to connect to an existing database. You should select the database in the **Available Databases on the Server** list.



You can also search for a specific database by using the **Database Filter** box.

Depending on the database you have selected, you can also select the relevant check box to update or repair the database, if required. If you want to shrink data after the database maintenance, select the **Shrink Data After Update** or **Shrink Data After Repair** check box, respectively.

## Tenant Setup Page

On this page, you can specify the following settings for the tenant:

- **Tenant Name:** The name of the tenant. The default tenant name is *Company*. If you want to change it, you should double-click the name in the column, type a new tenant name, and press Enter.



This name is used only when multiple tenants are present; otherwise, the Sign-In page will not display a tenant selection box. Due to integration with OData, the name cannot contain the following special symbols: , , ; , : , + , = , ? , ^ , < , > , / , \ , { , } , [ , ] , | , # , \$ , % , & , and @.

- **Insert Data:** The demo data that is used for this tenant. By default, a new tenant does not contain demo data. If you want to fill the database with demo data, you should select *SalesDemo* in the column.



The *U100* and *T100* demo data entries contain demo data that was prepared for the completion of Acumatica training courses.

For each tenant, you can also specify the following settings:

- **Parent Tenant ID:** The identifier of the tenant that will be used as the parent tenant for this tenant. By default, the *System* tenant is specified. For more details about parent tenants, see [Tenant Maintenance: General Information](#).
- **Visible:** The tenant's visibility to users. By default, a new tenant is visible (that is, the check box is selected). For more details about tenant visibility, see [Tenant Maintenance: General Information](#).
- **Advanced Settings:** A check box that indicates the ability to access advanced settings, such as defining parent tenants and inserting demo data, and displaying the *System* tenant if the check box is selected. By default, the check box is cleared.
- **Secure Tenant on the Sign-In Page:** A check box that indicates the ability to display the tenant selection box with all tenants of the instance on the Sign-In page. If the check box is selected, the tenant selection box on the Sign-In page of the instance will not appear until a user enters their username and password. After authorization, the system will display a list of companies allowed for the entered user account. For more details, see [Tenant Maintenance: General Information](#).

On this page, you can also create additional tenants or delete unneeded ones.

## Database Connection Page

On this page, you can select the authentication method for connection to the database. You should select one of the following option buttons:

- **Windows Authentication:** Select this option button if you want to use the default anonymous user account employed by Internet Information Services (IIS).



Windows authentication is not compatible with a MySQL Server.

- **SQL Server Authentication:** Select this option button if you want to use a different account for connecting to the database.

If you select this option, you should also specify the one of the following settings:

- **Create Login Credentials:** Select this option if you want to create a new SQL username.
- **Use Existing Login Credentials:** Select this option if you want to use an existing username and password.



The specified username must have the following minimum rights within the database server:

- For a Microsoft SQL server, *read*, *write*, *execute*, and *ddl\_admin*
- For a MySQL server, *create*, *alter*, *drop*, *select*, *delete*, *insert*, *update*, *create temporary tables*, and *execute*

## Instance Configuration Page

On this page, you can specify the following instance configuration settings:

- **Instance Name:** The Acumatica ERP instance name. By default, the instance name is *AcumaticaERP*. You can change it.
- **Create Acumatica ERP Site:** An option button that you select if you want to create an Acumatica ERP application instance.
- **Create Self-Service Portal:** An option button that you select if you want to create an Acumatica Self-Service Portal site.



The Acumatica Self-Service Portal is designed to be a site where your customers can view relevant information about their interactions with your company as a vendor and perform common activities online. It is a special type of application instance connected to your Acumatica ERP instance but with limited access to functionality. For more details, see [Instance Deployment: Deploying the Acumatica Self-Service Portal](#).

- **Local Path to the Instance:** The path on the local computer to the application instance. By default, it is `C:\Program Files\Acumatica ERP\InstanceName`, but you can change it.

## Website Configuration Page

On this page, you can configure the website and application pool.

In the **Website Settings** section, you specify the following settings:

- **Available Websites:** Select the website that you want to use. By default, the *Default Web Site* is selected.
- **Create Virtual Directory:** Select the check box if you want to create a virtual directory with a name specified in the **Virtual Directory Name** box. To use the URL of the IIS default site (that is, `http://www.domain.com`), clear the **Create Virtual Directory** check box.
- **Compile the Site:** Select this check box if you want to allow the system to load the website faster for the first time.
- **Install RabbitMQ:** Select this check box if you want to install RabbitMQ (if it is not already installed) to support push notification functionality.



If you clear the **Install RabbitMQ** check box, the Acumatica ERP Configuration wizard configures the Acumatica ERP instance to use Microsoft Message Queuing (MSMQ) for push notifications.

- **Install NodeJS:** Select this check box if you want to install the needed version of Node.js for the compilation of the customization code.



If you want to use the version of Node.js that has already been installed in your system, you can clear the **Install NodeJS** check box and add the following key to the `appSettings` section of the `Web.config` file of your instance: `<add key="NodeJs:NodeJsPath" value="C:\Program Files\NodeJs" />`, where `value` specifies the path to the location where Node.js has been installed.

You may want to use a dedicated application pool to better isolate instances and fine-tune resources that are allocated for the instance by IIS. To specify the dedicated application pool, select one of the following options in the **Application Pool Settings** section:

- **Create New Application Pool:** Select this option button if you want to create a new application pool. You should also type the application pool name in the **Application Pool Name** box.

- **Use Existing Application Pool:** Select this option button if you want to use an existing application pool. You should select the name of this application pool in the list of available application pools.
- The list of application pools includes all the application pools you can use to install Acumatica ERP from the list of pools configured in the IIS web server. You can select an application pool that uses either the classic or integrated model of request processing through the web server.



Acumatica ERP employs the application pools that use one of the supported .NET Framework versions. For the list of supported .NET Framework versions, see [System Requirements for the Acumatica ERP Installation](#).

For a production instance, we recommend that you create a new application pool for production deployment.

## Confirmation of Configuration Page

On the last page, you can review and confirm the overall instance configuration.

If you want to save the configuration settings in an XML file on your computer for use with a command-line tool, you should click **Save Configuration**. For details, see [Using the Acumatica ERP Command-Line Tool](#).

If you click **Finish**, the deployment of the Acumatica ERP instance will begin.

## Configuration Wizard Logs

By default, the system saves short logs for changes that have been made in an instance by using the Acumatica ERP Configuration wizard or the command-line tool. These changes are saved in the `Logs` folder, which is located in the folder where you have installed Acumatica ERP.



You have specified the path to this folder on the Destination Folder page of the Acumatica ERP Setup wizard.

If you want to save full logs in the `Logs` folder, you should select the **Full Logging Mode** check box on the Confirmation of Configuration page of the Acumatica ERP Configuration wizard before starting to deploy the instance. You can also use the command-line tool to activate full logging mode. For details, see [Acumatica ERP Command-Line Tool: General Information](#). This mode might be helpful for investigating the cause of any errors that occur in the instance.

For more details about using logs, see [Using Logs](#).

## Instance Deployment: Accessing an Instance for the First Time

When you finish deploying an Acumatica ERP application instance, you need to access it initially to proceed with further configuration.

### Opening a Newly Created Instance

Typically, the Acumatica ERP Configuration wizard completes the deployment of a new instance and returns you to the Welcome page of the wizard so that you can continue working with it. You can use the Acumatica ERP Configuration wizard to open the newly created instance as follows:

1. On the Welcome page, click **Perform Application Maintenance**.
2. On the Application Maintenance page, which opens, in the list of the installed sites, click the instance you want to open, and then click the **Launch** button.

The instance opens in a new tab of your default browser.

If you do not want to use the Acumatica ERP Configuration wizard, you can open the newly created instance in one of the following ways:

- On the Start menu, find the instance, and then click its name.
- In the address line of your web browser, enter the address: `http://localhost:80/Instance_name/`, where `Instance_name` is the name you have specified for your instance.

You can omit the port number (that is, `:80`) in the URL if your server uses the default port 80 to connect to the HTTP protocol. In that case, you enter the following address: `http://localhost/Instance_name/`.

To access the Acumatica ERP instance remotely, as any other user would, you would use the fully qualified domain name (FQDN) of the server instead of `localhost` in the URL.



The instance name is the name that you have specified in the **Virtual Directory Name** box on the Website Configuration page during instance creation.

## Accessing a New Instance

Every Acumatica ERP instance comes with an active default user account (*admin*) that you use to sign in to the system. The password for this user account for the first sign-in is *setup*. You start working with Acumatica ERP by changing the password for this user on the Sign-In page of the application instance.



By default, a password must be at least eight characters and contain characters from three of the following four categories:

- English uppercase characters (A through Z)
- English lowercase characters (a through z)
- Numerals (0 through 9)
- Special characters (such as !, \$, #, and %)

For details, see [Preparing an Instance: System-Wide Security Policy](#).

Before you proceed, you should click the link of the Acumatica User Agreement above the **Sign In** button, read the agreement, and then select the check box to indicate that you have read the terms of the agreement and agree to them.

After that, you can click the **Sign In** button on the Sign-In page. The home page of the Acumatica ERP instance opens.

## Instance Deployment: To Deploy an Out-of-the-Box Instance

In this activity, you will learn how to deploy an Acumatica ERP out-of-the-box application instance (that is, the instance without demo data) and sign in to it for the first time.

### Story

Suppose that you are the system administrator of your company, and you need to deploy the Acumatica ERP out-of-the-box instance.

### Process Overview

In this activity, you will do the following:

1. Deploy the Acumatica ERP out-of-the-box instance
2. Sign in to the Acumatica ERP out-of-the-box instance for the first time

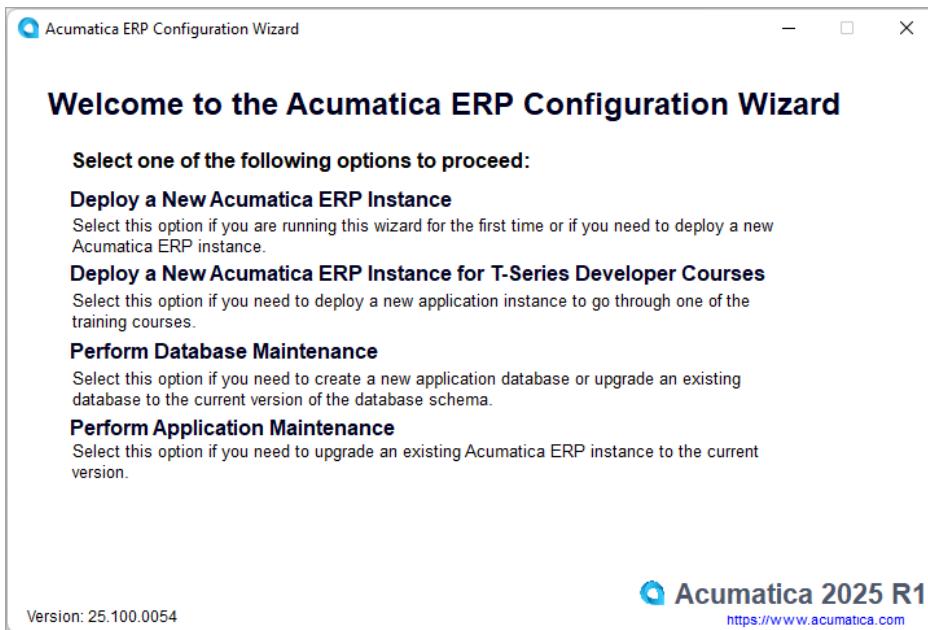
## System Preparation

Before you begin deploying an Acumatica ERP out-of-the-box application instance, make sure you have installed the Acumatica ERP Configuration wizard by performing the following prerequisite activity: [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard](#).

### Step 1: Deploying an Out-of-the-Box Instance

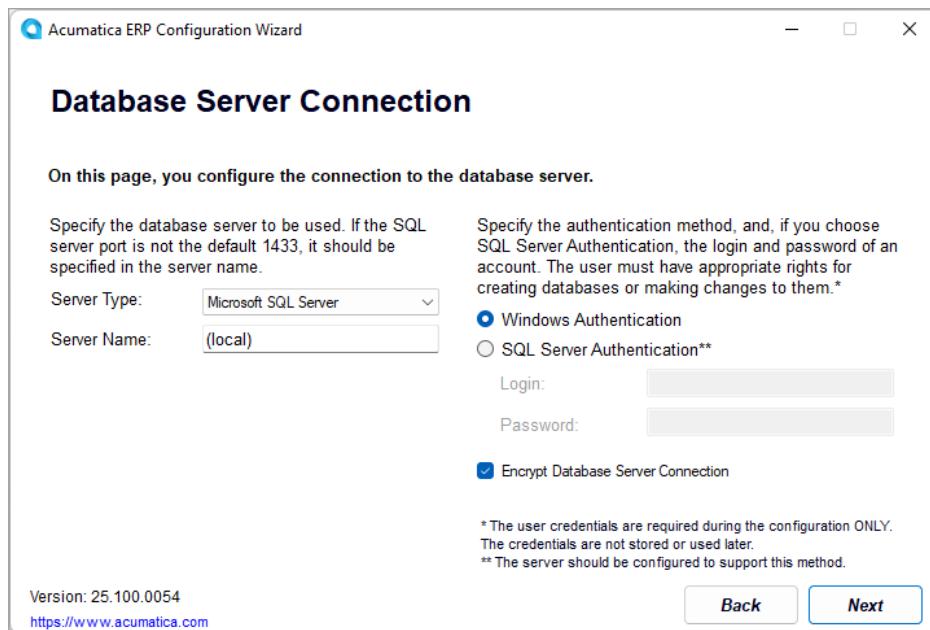
To deploy an Acumatica ERP out-of-the-box instance, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Deploy a New Acumatica ERP Instance**, as shown in the following screenshot.



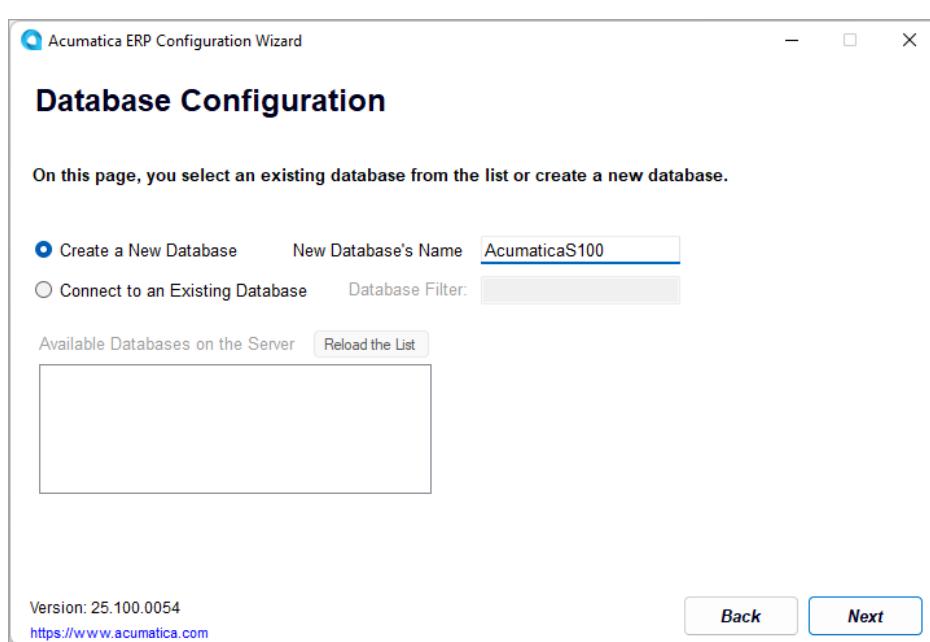
*Figure: The Welcome page of the Acumatica ERP Configuration wizard*

3. On the Database Server Connection page, which opens, specify the following settings, and then click **Next** (see the screenshot below):
    - a. **Server Type:** Microsoft SQL Server
    - b. **Server Name:** (local)
- ! If you are using the Microsoft SQL Server Express edition, enter LOCALHOST \\SQLEXPRESS.
- c. **Windows Authentication:** Selected
  - d. Optionally. **Encrypt Database Server Connection:** Selected



**Figure: The Database Server Connection page**

4. On the Database Configuration page, which opens, enter the following settings to create a new database, and then click **Next** (see the following screenshot):
  - a. **Create a New Database:** Selected
  - b. **New Database's Name:** AcumaticaS100 .



**Figure: The Database Configuration page**

The Tenant Setup page opens. By default, the wizard creates a new tenant with no data preloaded and with the default name **Company** in the **Tenant Name** column. The name specified in this column is displayed on the Sign-in page of the application instance and in the instance's user interface.

5. On the Tenant Setup page, change the tenant name to **MyCompany**, and then click **Next** to go to the next page.

Leave the default values in other boxes, as shown in the following screenshot.

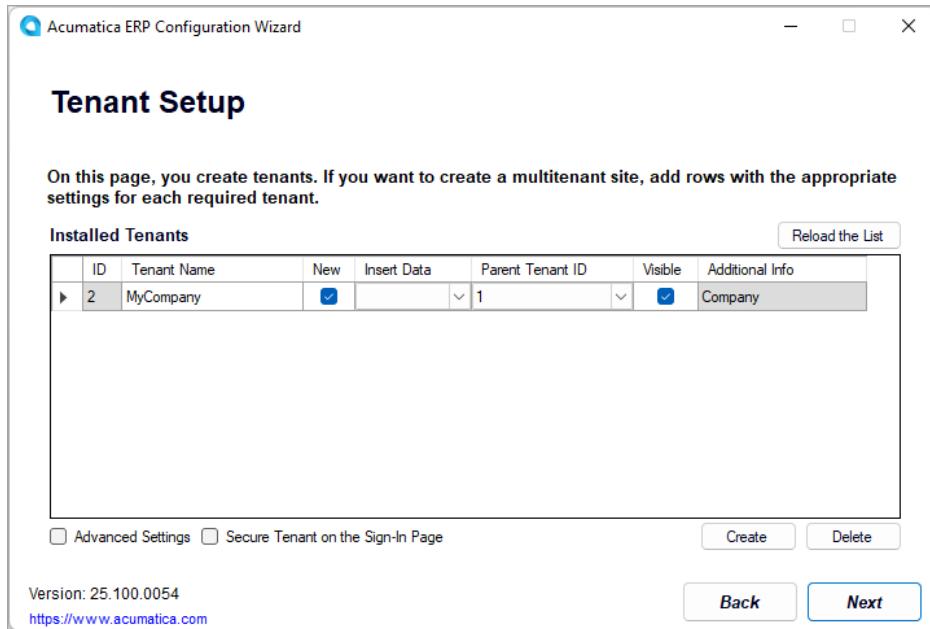


Figure: The Tenant Setup page

6. On the Database Connection page, which opens, leave the default **Windows Authentication** option selected, as shown in the following screenshot, and click **Next**.

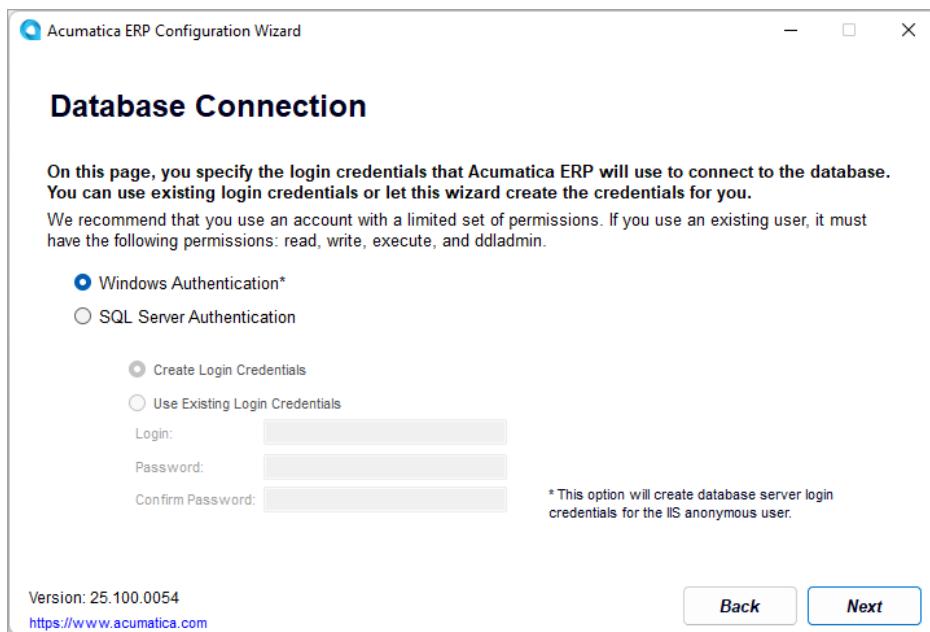


Figure: The Database Connection page

The default anonymous user account used by Internet Information Services, which is *ApplicationPool\identity*, will be used to connect to the database.

7. On the Instance Configuration page, which opens, enter the following settings, and then click **Next**:

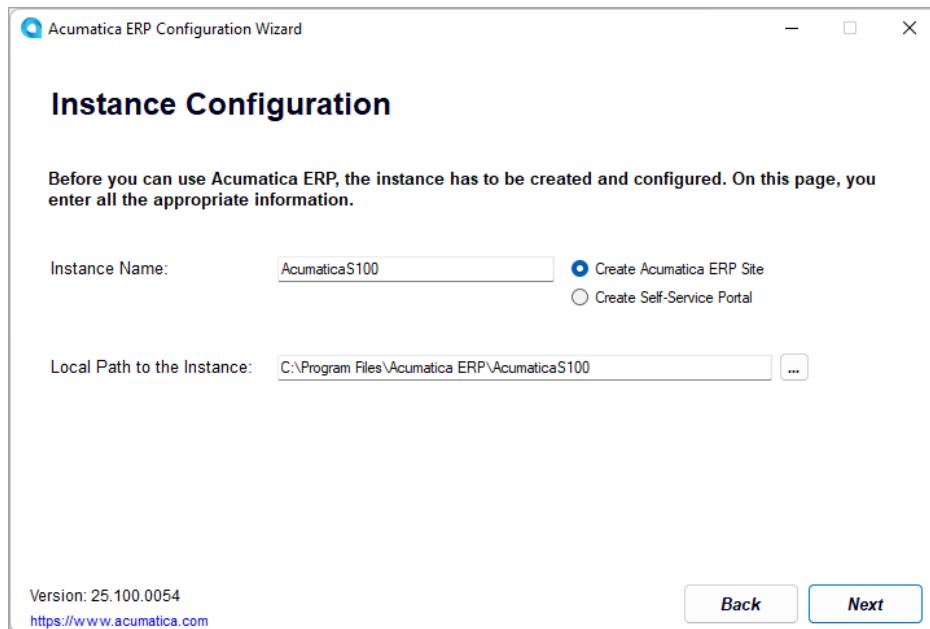
- a. **Instance Name:** *AcumaticaS100*.

By default, this is the name that you have specified for the database. You can change it.

- b. **Create Acumatica ERP Site:** Selected.

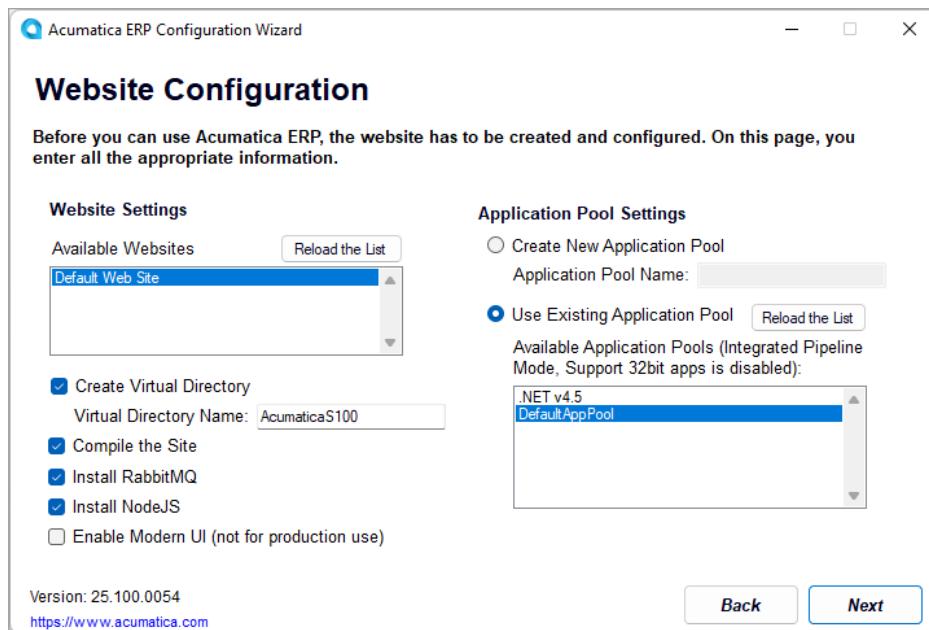
- c. **Local Path to the Instance:** The path on the local computer to the application instance being created.

By default, this is the folder with the instance name, which is located in the folder where the Acumatica ERP Configuration wizard has been installed. The path should have the following format: %Program Files%\Acumatica ERP\AcumaticaS100, as shown in the following screenshot.



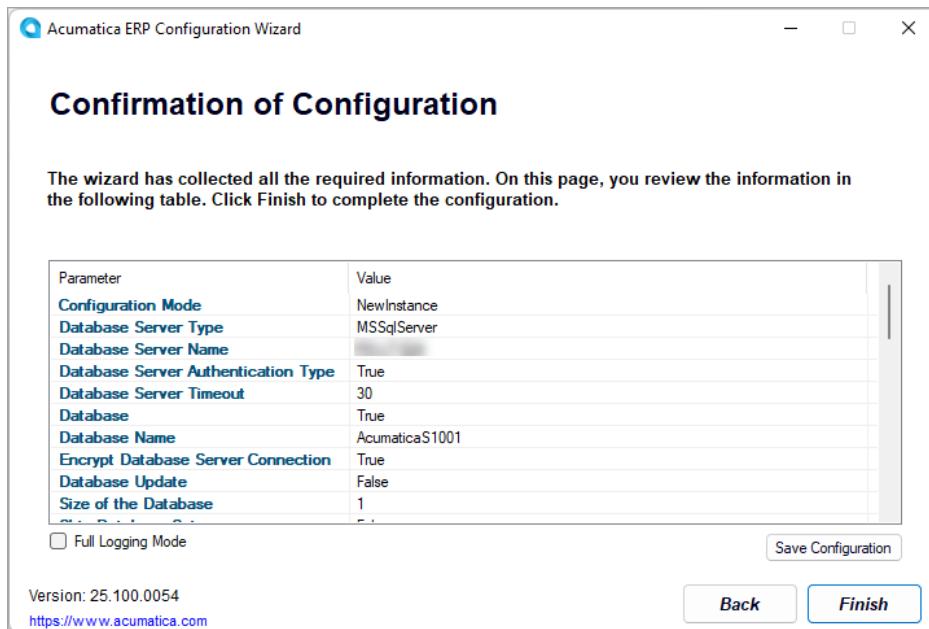
*Figure: The Instance Configuration page*

8. On the Website Configuration page, which opens, specify the following settings, and then click **Next** (see the screenshot below):
  - a. **Available Websites:** *Default Web Site*
  - b. **Create Virtual Directory:** Selected
  - c. **Virtual Directory Name:** Name of the virtual directory, which matches the instance name
  - d. **Compile the Site:** Selected
  - e. **Install RabbitMQ:** Selected
  - f. **Install NodeJS:** Selected
  - g. **Enable Modern UI:** Cleared
  - h. **Use Existing Application Pool:** Selected
  - j. **Available Application Pools:** *DefaultAppPool*



**Figure: The Website Configuration page**

The Confirmation of Configuration page opens, as shown in the following screenshot.



**Figure: The settings of the instance to be created**

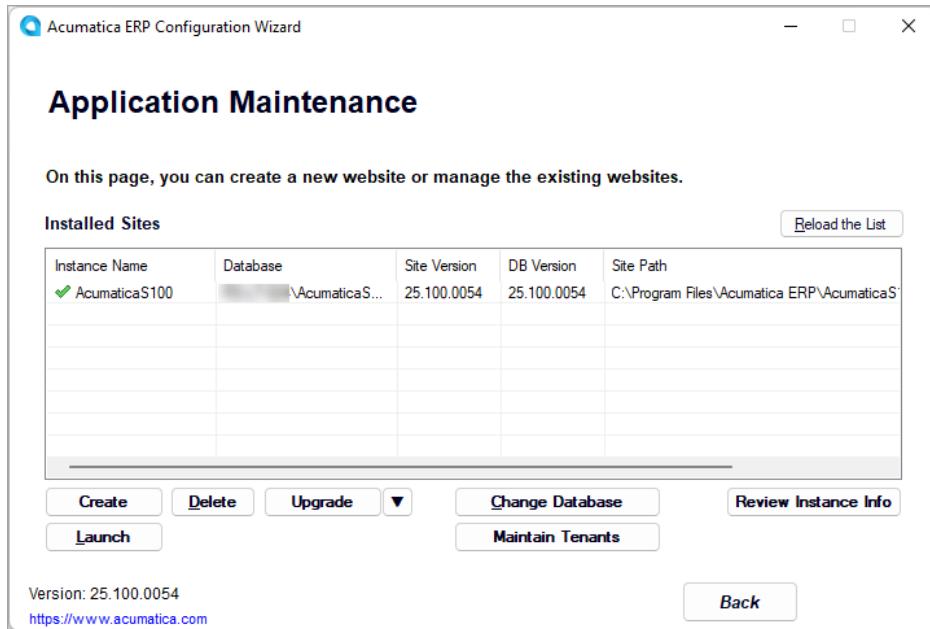
9. Click **Finish**, and wait while the installation process completes.
10. Click **OK** in the dialog box after the installation is complete; the system returns you to the Welcome page of the Acumatica ERP Configuration wizard.

The new Acumatica ERP instance is created, and now you can access it for the first time.

## Step 2: Accessing the Instance for the First Time

To access the *AcumaticaS100* application instance for the first time, do the following:

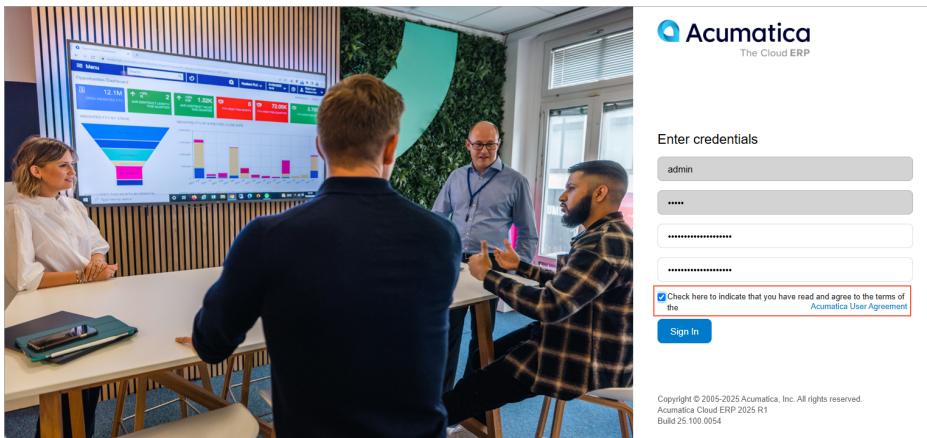
1. While you are viewing the Welcome page of the Acumatica ERP Configuration wizard, click **Perform Application Maintenance**.
2. On the Application Maintenance page, which opens, in the list of installed sites, click the *AcumaticaS100* instance, and then click the **Launch** button, as shown in the following screenshot.



*Figure: The list of the Acumatica ERP installed sites*

The instance opens in a new tab of your default browser.

3. Use the following credentials for the first sign-in:
  - **Username:** admin
  - **Password:** setup
4. Click **Sign In**.  
The system prompts you to enter a new password and confirm it.
5. Type the new password in the **New Password** and **Confirm Password** boxes.  
By default, passwords must be at least 8 characters and contain characters from three of the following four categories:
  - English uppercase characters: A through Z
  - English lowercase characters: a through z
  - Numerals: 0 through 9
  - Special characters: !, \$, #, and %
6. Click the link of the Acumatica User Agreement above the **Sign In** button, read the agreement, and then select the check box to indicate that you have read the terms of the agreement and agree to them, as shown in the following screenshot.



*Figure: Creation of a new password to an application instance*

#### 7. Click **Sign In**.

The home page of the Acumatica ERP instance opens.

## Instance Deployment: Feature Activation and Licensing

After you have deployed an instance, you can start the implementation. You need to activate the instance by enabling the default set of features. Then you apply the license and enable any purchased features that are not in the default set.

In this topic, you will read about the first sign-in to a new instance, license obtainment, feature enabling, and the limitations of trial and license modes.

### First Sign-In to Acumatica ERP

When you sign in to a new Acumatica ERP instance for the first time and attempt to navigate to any form, the system brings up the [Enable/Disable Features](#) (CS100000) form (the only form you can access), which you use to enable the default set of features. After you do this, you can access the [Activate License](#) (SM201510) form, where you can activate your license key if you want to remove the trial mode restrictions. If you want to proceed with the trial mode, you can enable any other features that are available.

### Obtaining of a License

In Acumatica ERP, you can request the purchased license by creating a support case through the [Partner Portal](#). You should specify the following settings in the case:

- **Installation ID:** The installation ID is available in the **About** dialog box of the Acumatica ERP application instance. To open this dialog box, on any Acumatica ERP form, select **Tools > About**.
- **Contract ID:** You can find this ID on your Acumatica ERP sales invoice.

After your license request is processed, you will receive a license key. Acumatica uses a licensing server to validate licenses. If the server where you installed the Acumatica ERP instance has no access to the internet, because of the Acumatica security policy, you may request a license file instead of the key.

You apply the key to your instance by clicking **Enter License Key** on the form toolbar of the [Activate License](#) (SM201510) form, enter the license key in the **Activate New License** dialog box, and click **OK**. The system contacts the licensing server and validates the license online. Each license can be used to activate a predetermined number of instances. If you reach the limit for your license, you generally will not be able to use this license. Alternatively,

depending on your license settings, the system may bring up a prompt asking if you want to deactivate the license from the oldest instance.



To validate your license, the licensing server requires that port 443 be open on the computer that is running the Acumatica ERP instance where you enter the key. You may have to open port 443 if the computer has a firewall enabled.

To apply the license file, you should click **Upload License File** on the form toolbar of the [Activate License](#) form, and then select and upload the license file by using the **Upload New License File** dialog box. If you use a license file, the system validates the license without contacting the licensing server.

## Product Features

Acumatica ERP provides scalable core system functionality and offers a range of add-on features. On the [Enable/Disable Features](#) (CS100000) form, you can view and modify the list of enabled features according to your license limitations.

You must enable a feature to cause all feature-related forms and individual elements to appear in Acumatica ERP. Some features may add only additional elements to the available forms, and others may enable a workspace or a set of workspaces with multiple forms. For example, the **Projects** menu item appears on the main menu only if the *Project Accounting* feature is enabled. If you enable the *Tax Entry From GL Module* feature, it only adds additional elements to the [Journal Transactions](#) (GL301000) form, which is available with the default set of features.

The [Enable/Disable Features](#) form also displays (at the top of the form) the state of the currently selected feature set—that is, the set of functionality available in your instance of Acumatica ERP. The following states are possible:

- *Pending Activation:* The system displays this status when you access the form for the first time to enable the standard set of features. Also, the system displays the status after you click **Modify** on the form toolbar to change the selection of features. This status indicates that the current settings on the form do not reflect the actual set of functionality available in Acumatica ERP.
- *Validated:* The system displays this status when you have enabled the features selected on the form by clicking **Enable** on the form toolbar. With this status, the enabled features on the form reflect the actual functionality available in your instance of Acumatica ERP.

Before you start implementing Acumatica ERP, you may find it helpful to become familiar with the functionality to be implemented and the add-on features your organization has included in the license. For details, see [Preparing an Instance: Acumatica ERP Features](#).



You can also use the [Enable/Disable Features](#) form to disable individual features in Acumatica ERP. We recommend that you *not* disable any feature after it has been enabled and used in the live system; this may cause unexpected results, including data loss.

## Trial and License Modes

By default, Acumatica ERP is installed in trial mode. Although all features are available in this mode, the mode has the following restrictions:

- You can create no more than 10 tenants per instance.
- All tenants that you create are assigned the *Test Tenant* status. For details, see [Tenants: General Information](#).
- A watermark is added to all printed forms and reports.
- Only two conventional users can concurrently use the system.



*Conventional users* are users who can sign in by using their usernames and passwords on the Acumatica ERP Sign-In page, through the mobile application, or via the single sign-on page if SSO with Google or Microsoft Account has been set up.

Each time a third conventional user signs in to Acumatica ERP, one of the current users is forcibly signed out. The following message is displayed at the bottom of each form: *Your product is in trial mode. Only two concurrent users are allowed.* The message is followed by the *Activate* link, which you can click to activate a license.

- Only two API users can concurrently use the system. A third API user cannot sign in to Acumatica ERP and receives an error during the sign-in attempt.



API users are users with client applications that can sign in using the contract-based REST API method, the screen-based SOAP API, or the OAuth 2.0 authorization mechanism for applications.

In trial mode, you can enable and use any feature. For a production site, you should activate the full-product license, thus running the system in license mode. After the license activation, the system hides the features that are not included in your license on the *Enable/Disable Features* (CS100000) form, and you will not be able to enable these features.

When you obtain the license for using Acumatica ERP and apply this license to an instance, the trial mode restrictions are removed. The license defines the license tier (that is, the level of resources that you can use by using the license) and the set of features you can enable for the instance. For details on license tiers, see *Typical Hardware and Virtual Machine Configurations for PCS and PCP Licenses for the Acumatica ERP Installation*.



During licensing and activation, the application instance is restarted. When you apply a license to a non-testing environment, make sure that all users of your website are warned about the restart of the site so that they can save all work in progress.

## Instance Deployment: To Enable Features and Activate the License

In the following activity, you will learn how to enable features in Acumatica ERP, activate the license, and review the license information.

### Story

Suppose that the SweetLife Fruits & Jams company has purchased an Acumatica ERP subscription in Acumatica Business Cloud. The instance has been installed by SaaS engineers.

As a system administrator, you have received the instance URL and the credentials to the *admin* user. Now you need to prepare the instance for implementation. You will be the first one to sign in to the instance, and you will activate and license it with the product key you have obtained from the sales representative.

The company has purchased the S1 license tier with three concurrent users and five tenants. In addition to the default set of features, your company has purchased the basic functionality associated with the *Inventory and Order Management* group of features.

### Process Overview

To begin using the system after the installation, you will use the *Enable/Disable Features* (CS100000) form to enable the standard set of features, which gives you the ability to access the *Activate License* (SM201510) form.

When you enable the features, you will still be in trial mode. To remove the restrictions of the trial mode, you will activate the license and enable the features that you bought in addition to the standard set.

## System Preparation

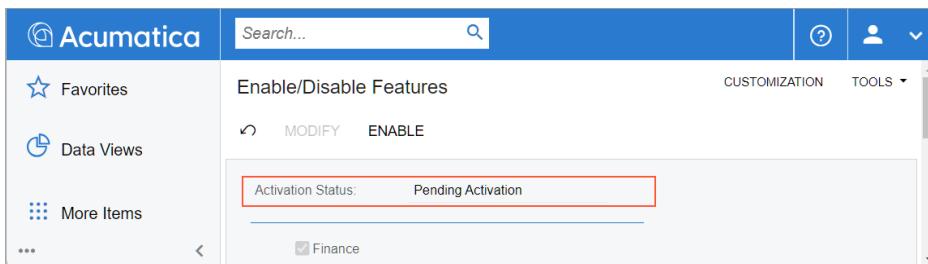
Before you begin enabling features on an Acumatica ERP application instance, make sure that you have performed the following prerequisite activity: [Instance Deployment: To Deploy an Out-of-the-Box Instance](#).

### Step 1: Enabling Features for the First Time

To enable features in Acumatica ERP for the first time, do the following:

1. Launch the *AcumaticaS100* application instance and sign in with the *admin* username and the password that you have specified for this instance.
2. Open the [Enable/Disable Features](#) (CS100000) form.

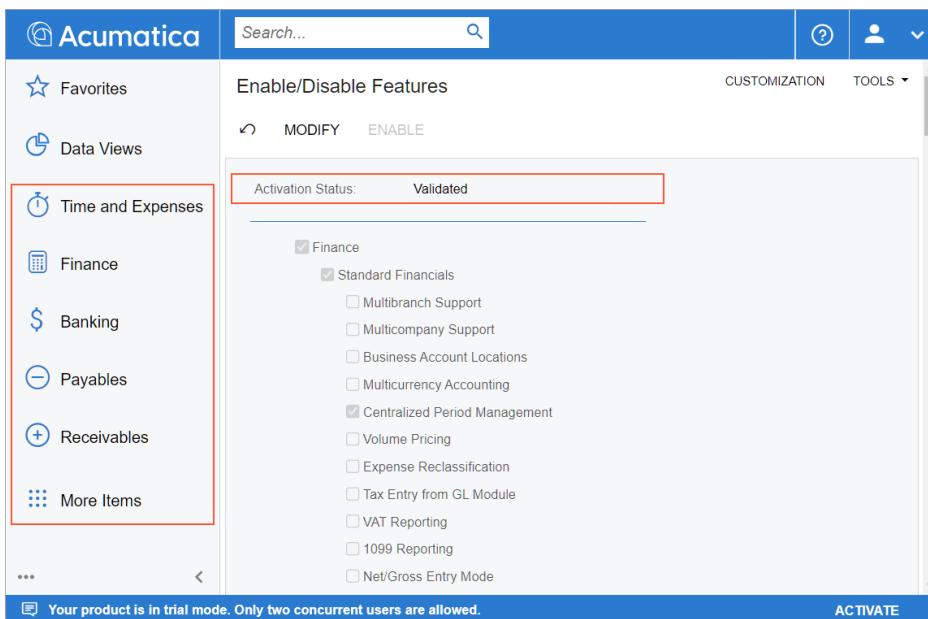
Notice that a number of features are selected by default and the activation status is *Pending Activation*, as shown in the following screenshot.



*Figure: Activation status of initial features*

3. On the toolbar, click **Enable** to activate the selected features.

The activation status of the currently selected feature set is now *Validated*, as the screenshot below shows. On the main menu, notice that new menu items (**Time and Expenses**, **Finance**, **Banking**, **Payables**, and **Receivables**) have appeared (also shown in the screenshot) that correspond to the features you have enabled. You can now click any of these menu items to go to the corresponding workspace and go to the forms within it.



*Figure: The Validated status and the new menu items*

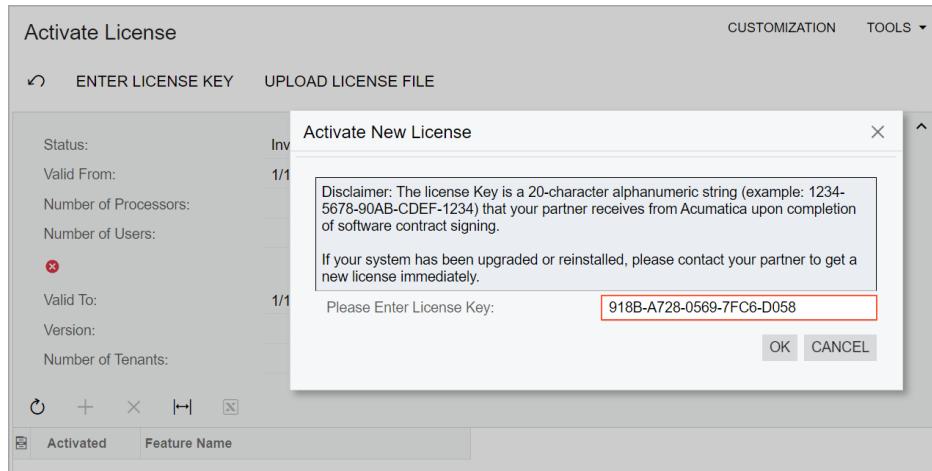
## Step 2: Activating the License

To activate the license, do the following:



Before you proceed with license activation on a real website, make sure that all Acumatica ERP users have saved their work and signed out of the system. During license activation, the Acumatica ERP instance will be restarted, and any unsaved work will be lost.

1. Open the [Activate License](#) (SM201510) form and do the following:
  - a. On the form toolbar, click **Enter License Key**.
  - b. In the **Activate New License** dialog box, enter the 918B-A728-0569-7FC6-D058 license key, as shown in the following screenshot.



**Figure: The license key**

- c. Click **OK** at the bottom of the dialog box.

The system contacts the licensing server and validates the license online.



The license key used in this activity is for training purposes only. The license will be deactivated in 24 hours and the instance will return to the trial mode. The license can be applied to an instance only once.

2. In the **Agree to Proceed** dialog box, which opens, click the link to read the software license agreement. If you agree to the terms, click **Agree** to proceed with activation. The dialog box closes.
3. In the Summary area of the form, review the status of the license (*Valid*), its validity period, and the number of users and tenants, as shown in the following screenshot.

The screenshot shows the 'Activate License' screen in Acumatica. At the top, there are tabs for 'ENTER LICENSE KEY', 'UPLOAD LICENSE FILE', and 'APPLY LICENSE'. Below these are several input fields: 'Status' (Valid), 'Valid From' (6/8/2020 12:00:00 AM), 'Number of Users' (3), 'Valid To' (10/15/2026 12:00:00 AM), 'Version' (grayed out), and 'Number of Tenants' (5). A toolbar below the fields includes icons for refresh, add, delete, and search. Below the toolbar is a table titled 'Activated' with columns 'Activated' and 'Feature Name'. The table lists several features: Business Account Locations, Active Directory and Other External SSO, Acumatica Payments, Address Lookup Integration, Address Validation Integration, Authentication (which is checked), Warehouse Management, and Advanced Integration Engine.

**Figure: The license information**

4. In the table, review the features that this license supports.



You can use the filter for the **Activated** column to filter the activated features.

5. On the form toolbar, click **Apply License** to activate your license, and the system will restart the instance.

### Step 3: Enabling Additional Features

To enable additional features in Acumatica ERP, do the following:

1. Open the [Enable/Disable Features](#) (CS100000) form.

Notice that the list of features is narrowed to the features allowed by the applied license.

2. On the form toolbar, click **Modify**.
3. In the list of features, select the **Inventory and Order Management** check box.
4. On the toolbar, click **Enable** to activate the selected features.

The status of the currently selected feature set is now *Validated*. On the main menu, notice that new workspace menu items (**Sales Orders**, **Purchases**, and **Inventory**) have appeared that correspond to the feature you have enabled. You can now open the forms in these workspaces.

### Step 4: Reviewing the License Information

To review the license information—which includes the license status and limitations, warnings about any exceeded limits, and statistics about commercial transactions and constraints—do the following:

1. Open the [License Monitoring Console](#) (SM604000) form.
2. On the **License** tab, which is shown in the screenshot below, review the information about your license as follows:

- In the **License Status** read-only box, verify that the license status is *Valid*, which means that the instance is licensed and has been activated.
- In the **License Details** section, review the instance limitations.
- In the **Recommended Maximums** section, notice that **Concurrent Users** is set to 3. This means that three users can work in the system at the same time.

The screenshot shows the 'License Monitoring Console' interface. At the top, there are tabs for 'LICENSING', 'STATISTICS', 'WARNINGS', and 'CONSTRAINT HISTORY'. Below the tabs, under 'LICENSING', there's a 'LICENSE STATUS' section with 'License Status: Valid' and 'License Tier: S Series, Tier 1'. A red box highlights this section. Under 'LICENSING DETAILS', there are fields for 'Monthly Number of Commercial Transactions' (1000), 'Monthly Number of ERP Transactions' (20000), and 'Database Storage Included (GB)' (1). A red box highlights the 'License Details' section. Under 'RECOMMENDED MAXIMUMS', there are fields for 'Daily Commercial Transactions' (100), 'Daily ERP Transactions' (2000), and 'Concurrent Users' (3). A red box highlights the 'Recommended Maximums' section. On the right side, under 'SYSTEM CONSTRAINTS', there are several fields with their respective maximum values: 'Maximum Number of Web Services API Users' (10), 'Maximum Number of Concurrent Web Services API Requests' (3), 'Maximum Number of Web Services API Requests per Minute' (50), 'Maximum Number of Lines per Transaction' (1000), 'Maximum Number of Serial Numbers per Document' (2000), and 'Maximum Number of Employees Paid by Month' (0).

*Figure: The License Monitoring Console form*

## Instance Deployment: To Deploy an Instance with Demo Data

In this activity, you will learn how to deploy an Acumatica ERP application instance with demo data.

### Story

Suppose that you are the system administrator of your company, and you need to deploy the Acumatica ERP application instance with the *T100* dataset.

### Process Overview

In this activity, you will deploy the Acumatica ERP application instance with the *T100* dataset.

### System Preparation

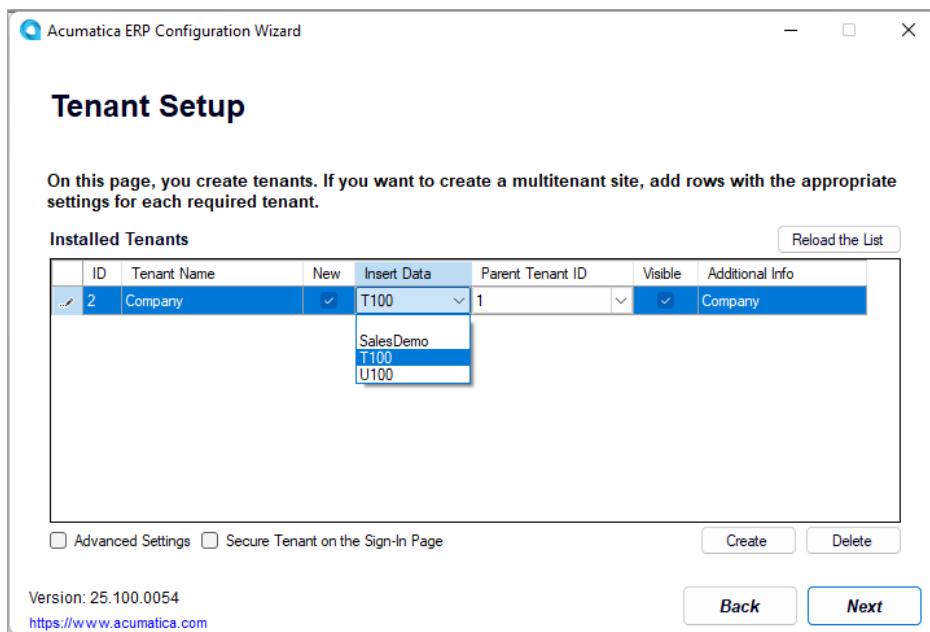
Before you begin deploying an Acumatica ERP application instance, make sure that you have performed the following prerequisite activity: [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard](#).

### Step: Deploying an Instance with the Demo Data

To create an Acumatica ERP instance with the *T100* dataset inserted, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, which opens, click **Perform Application Maintenance**.
3. Below the list of existing application instances, click **Create**.
4. On the Database Server Connection page, specify the following settings, and then click **Next** to go to the next page:
  - **Server Type:** Microsoft SQL Server
  - **Server Name:** (local)

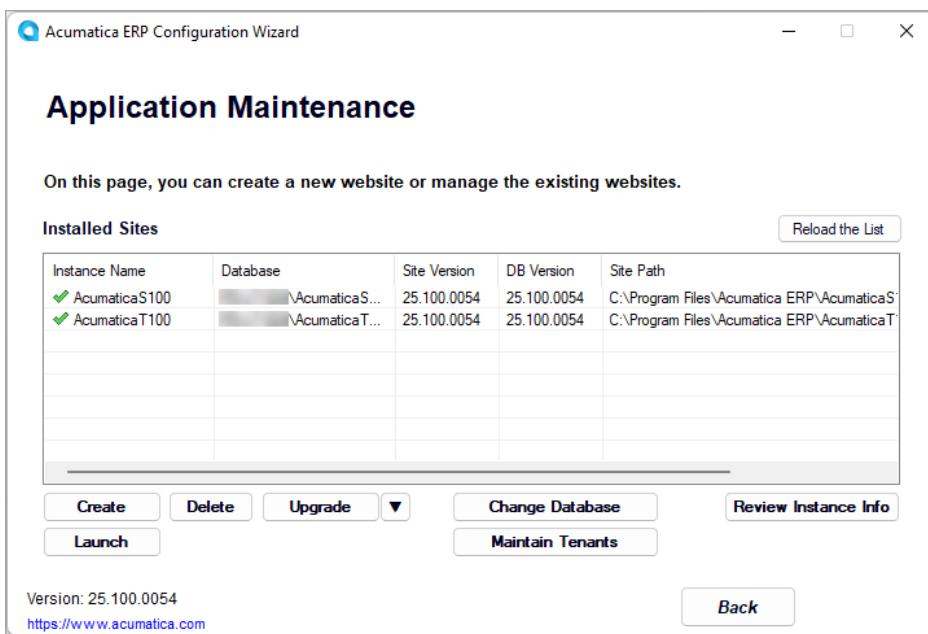
- **Windows Authentication:** Selected
- On the Database Configuration page, specify the following settings, and then click **Next** to go to the next page:
    - **Create a New Database:** Selected
    - **New Database's Name:** AcumaticaT100
  - On the Tenant Setup page, double-click in the **Insert Data** column for the automatically created row with the *Company* tenant name, and select *T100*, as shown in the following screenshot.



*Figure: Selection of a dataset for a new tenant*

- Click **Next** to go to the next page.
- On the Database Connection page, select **Windows Authentication**; click **Next**.
- On the Instance Configuration page, specify the following settings, and then click **Next** to go to the next page:
  - **Instance Name:** AcumaticaT100
  - **Create Acumatica ERP Site:** Selected
  - **Local Path to the Instance:** The path to the application instance on the local computer
- On the Website Configuration page, specify the following settings, and then click **Next** to go to the next page:
  - **Website Settings:** Default Web Site
  - **Create Virtual Directory:** Selected
  - **Virtual Directory Name:** AcumaticaT100
  - **Use Existing Application Pool:** Selected
  - **Available Application Pools:** DefaultAppPool
 Leave the other settings without changes.
- On the Confirmation of Configuration page, review the settings, and click **Finish**. Wait while the new application instance is created.
- After the installation is completed, click **OK** in the dialog box to return to the Acumatica ERP Configuration wizard.
- Click **Perform Application Maintenance**.

On the Application Maintenance page, which opens, the list of existing application instances now contains two sites: *AcumaticaT100* and *AcumaticaS100*, as shown in the following screenshot.



**Figure: The list of the application instances**

14. Click the row with *AcumaticaT100* instance, and then click **Launch**.

The instance opens in a new tab of your default browser.

15. Use the *admin* username and the *setup* password to sign in to the instance for the first time, and change the default password.

The home page of the Acumatica ERP instance opens.

16. To verify that the demo data has been inserted, open the *Employees* (EP203000) form, and make sure that there are six employees (Michael Andrews, Maxwell Baker, Layla Beauvoir, Joseph Becher, Martin Bernia, and Todd Bloom). These employees do not come in the out-of-the-box tenant; they have appeared in the instance because you directed the wizard to insert the demo data.

# Lesson 4: Maintaining Tenants

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In this lesson, you will learn how to add more tenants to an Acumatica ERP instance and remove unneeded ones. Additionally, you will explore various modifications that can be made to tenants to meet your company's requirements.

## Tenant Maintenance: General Information

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Acumatica ERP provides you with the ability to create additional tenants, maintain them, and delete them by using the Acumatica ERP Configuration wizard.

This topic describes the ways of adding tenants by using the Acumatica ERP Configuration wizard, provides an overview of the System and custom parent tenants, and explains various changes that can be made to tenants.

## Learning Objectives

In this lesson, you will do the following:

- Become familiar with the process of adding more tenants
- Become familiar with the System tenant, a custom parent tenant, and the tenant hierarchy
- Create an additional tenant
- Deploy a multitenant Acumatica ERP instance
- Explore the visibility of tenants
- Learn about restrictions on tenant access
- Delete a tenant

## Applicable Scenarios

You may need to learn how to maintain tenants of the Acumatica ERP instance in scenarios that include the following:

- You are an implementation consultant who needs to add an additional tenant to the existing Acumatica ERP instance.
- You are an implementation consultant who needs to know what the System tenant is and how to create a custom parent tenant.
- You are a system administrator who needs to restrict access to some tenants within the Acumatica ERP instance for employees of the company.

## The System Tenant and Tenant Hierarchy

When you deploy an Acumatica ERP application instance, the hidden System tenant is always created automatically. The System tenant has an **ID of 1** in the **Parent Tenant ID** column on the Tenant Setup page of the Acumatica ERP Configuration wizard.

The System tenant contains predefined system data, such as preconfigured roles and numbering sequences, as well as wiki-based documentation. The system data is used by all tenants of the same application instance.

By default, the System tenant is hidden and all user-created tenants inherit the initial configuration and system (predefined) data from the System tenant. That is, in the tenant hierarchy, the System tenant serves as the root tenant and is the parent of all other tenants. All the data available in the System tenant is visible to other tenants in the same database.

When you create a new tenant, its parent tenant must be selected; the System tenant is inserted as a parent by default. If you create a new tenant by using the Acumatica ERP Configuration wizard, you can select any parent tenant for each of the child tenants by specifying its ID in the **Parent Tenant ID** column. If you create a tenant on the [Tenants](#) (SM203520) form, the System tenant is assigned as its parent automatically and you cannot change it. For details, see [Managing Tenants by Using the Web Interface](#).



Users can sign in to only child tenants. If you select an existing tenant to be a parent, users will not be able to sign in to the parent tenant anymore.

You cannot delete the System tenant.

## Creation of Additional Tenants

For an Acumatica ERP instance, you can create additional tenants on the Tenant Setup page of the Acumatica ERP Configuration wizard during or after the initial deployment of an instance.

You can add an additional tenant to the instance by clicking **Create** on the Application Maintenance page of the wizard. For details, see [Tenant Maintenance: To Create an Additional Tenant](#).

Also, you can create tenants and view information about their settings on the [Tenants](#) (SM203520) form. For details, see [Managing Tenants by Using the Web Interface](#).

## A Custom Parent Tenant

An application update or upgrade replaces all the data available in the System tenant, while the data created by users in user-created tenants remains unchanged. If you would like to replace preconfigured data, such as roles and numbering sequences, similarly for multiple new tenants, you can create a *custom parent tenant*: a parent tenant that will be used instead of the System tenant for your new tenants.

To configure a custom parent tenant, you create a new tenant on the Tenant Setup page of the Acumatica ERP Configuration wizard and provide a name that clearly indicates how this tenant will be used (for example, *NewParent* or *MyParent*). This tenant is a child of the System tenant and inherits all its data. In the custom parent tenant, you can override the preconfigured settings as needed and specify other configuration settings to be used in all the new tenants. Then when you create a new tenant by using the Acumatica ERP Configuration wizard, you specify the custom parent tenant as the parent tenant of the new tenant. The new tenant will inherit all the data from the custom parent tenant rather than from the System tenant.

You can create a custom parent tenant that is a child of another parent tenant. Note that users cannot sign in to a parent tenant.



You can create new tenants based on the custom parent tenant only by using the Acumatica ERP Configuration wizard. If you create new tenants on the [Tenants](#) (SM203520) form, the System tenant is assigned as its parent automatically. Due to technical limitations, you can have a maximum of 127 tenants on an Acumatica ERP instance. This includes all types of tenants, irrespective of their statuses.

## Restriction of Access to Tenants

In a multitenant Acumatica ERP instance, the tenant selection box appears on the Sign-In page by default, allowing users to select the tenant to sign in from the list of all available tenants.

If you want to restrict the list of tenants a user can see to only those the user has access to, select the **Secure Tenant on the Sign-In Page** check box on the Tenant Setup page of the Acumatica ERP Configuration wizard.

In this case, the tenant selection box does not appear on the Sign-In page by default, and all users must first authenticate themselves by entering their username and password. Depending on the user, one of the following occurs:

- A user who has access to only one tenant will be automatically signed in to that tenant after entering their username and password.
- A user who has access to multiple tenants and has the same credentials for these tenants must select a tenant in the tenant selection box, which appears after the user has been authenticated and contains the list of tenants available to the user.
- A user who has access to multiple tenants and has different credentials for different tenants is signed in to the tenant whose credentials the user entered on the Sign-In page.
- If a user who has access to multiple tenants and signs in to an Acumatica ERP instance by using single sign-on (SSO) with an external identity provider, the user is signed in to the first tenant that is listed on the [Tenant List](#) (SM203530) form with SSO enabled.



If you are using multiple tenants and SSO authentication and the **Secure Tenant on the Sign-In Page** check box is selected, ensure that all users can sign in to the first tenant listed on the [Tenant List](#) (SM203530) form. If a user cannot sign in to the first listed tenant, they will not be able to select a different tenant to sign in to.

## Visibility of Tenants

You can define the visibility of tenants for users on the Sign-In page of the Acumatica ERP instance. You do this by clearing or selecting the check box in the **Visible** column in the row of the tenant on the Tenant Setup page of the Acumatica ERP Configuration wizard. For details, see [Tenant Maintenance: To Change Tenant Visibility](#)

## Deletion of Tenants

You may need to delete an existing tenant. You can do this by using the Acumatica ERP Configuration wizard. On the Tenant Setup page of the wizard, you can select the tenant you want to remove and click **Delete**. For details, see [Tenant Maintenance: To Delete a Tenant](#).



Because any tenant you see on the Tenant Setup page may be in production, you should create backups before making any changes.

## Tenant Maintenance: To Deploy an Instance with Multiple Tenants

The following activity will walk you through the process of creating an Acumatica ERP application instance with three tenants. You will also make some changes to the tenants of the instance.

### Story

Suppose that you are the system administrator for a group of companies, and you need to deploy the Acumatica ERP application instance with three tenants, one for each of the companies included in the group. You also need to make some changes to the tenants and then delete one of the existing tenants.

### Process Overview

In this activity, you will do the following:

1. Deploy the Acumatica ERP application instance with three tenants.
2. Set up the visibility of a tenant.
3. Delete an existing tenant.

## System Preparation

Before you begin deploying an Acumatica ERP application instance, make sure that you have performed the following prerequisite activity: [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard](#).

### Step 1: Creating an Instance with Multiple Tenants and Changing Tenants' Visibility Settings

To create a multitenant Acumatica ERP instance, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Deploy a New Acumatica ERP Instance**.
3. On the Database Server Connection page, specify the following settings, and then click **Next** to go to the next page:
  - **Server Type:** Microsoft SQL Server
  - **Server Name:** (local)
  - **Windows Authentication:** Selected
4. On the Database Configuration page, specify the following settings, and then click **Next** to go to the next page:
  - **Create a New Database:** Selected
  - **New Database's Name:** AcumaticaMultitenant
5. On the Tenant Setup page, do the following to configure the tenants of the instance:
  - a. Click the **Create** button twice to add two more new tenants in addition to the default new tenant, so that there are three new tenants in the list.

The system automatically assigns the following names to the tenants in the **Tenant Name** column:

- For a tenant with an *ID* of 2: Company
- For a tenant with an *ID* of 3: Company2
- For a tenant with an *ID* of 4: Company3

- b. In the first tenant in the list (the *Company* tenant), double-click in the **Parent Tenant ID** column.

Notice that you can select only the default parent tenant (the *System* tenant, which has an **ID** of 1).

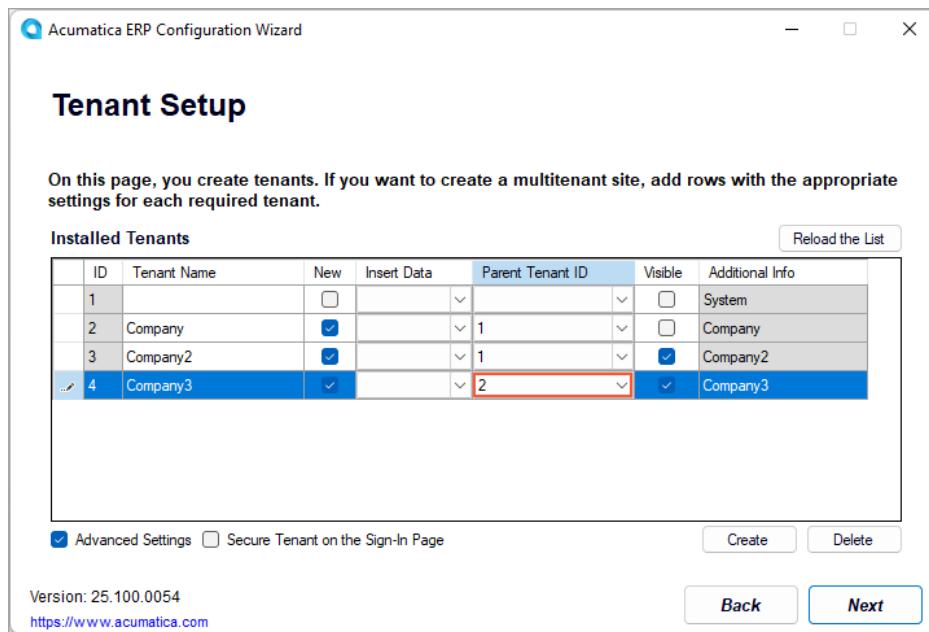
- c. Select the **Advanced Settings** check box below the table.

Now the wizard also displays the *System* tenant in the table. Notice that the **Visible** check box for this tenant is cleared, meaning that users do not see it.

- d. In the row with the *Company* tenant, clear the **Visible** check box.

- e. In the row with the *Company3* tenant, double-click in the **Parent Tenant ID** column and select 2, as shown in the screenshot below.

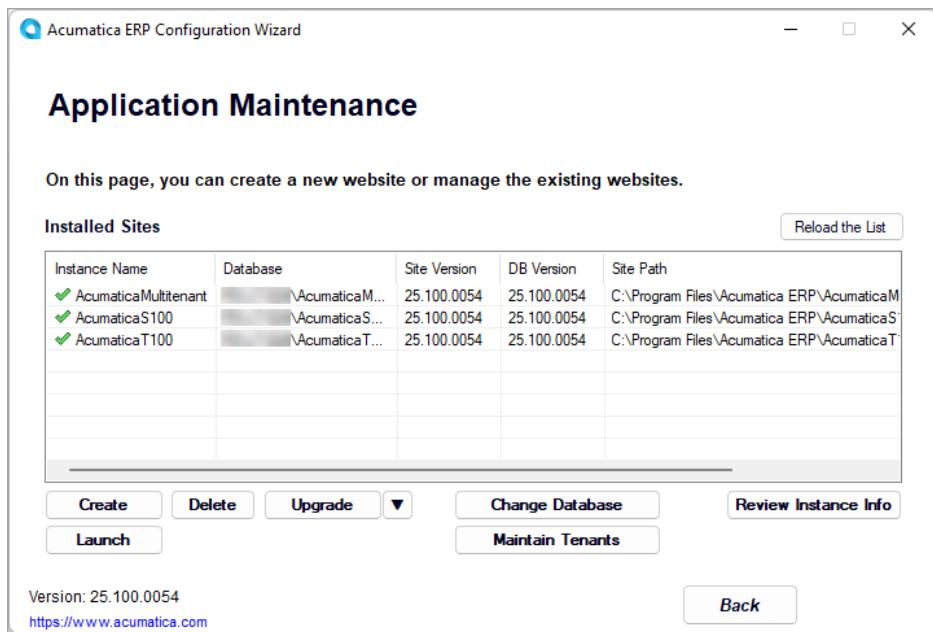
This makes *Company3* the child of *Company*. In this configuration, users will be able to sign in to only *Company2* and *Company3*, because these tenants do not have children.



**Figure: The tenants to be created for the instance**

- f. Click **Next** to go to the next page.
6. On the Database Connection page, select **Windows Authentication**; click **Next**.
7. On the Instance Configuration page, specify the following settings, and then click **Next** to go to the next page:
  - **Instance Name:** AcumaticaMultitenant
  - **Create Acumatica ERP Site:** Selected
  - **Local Path to the Instance:** The path on the local computer to the application instance
8. On the Website Configuration page, specify the following settings, and then click **Next** to go to the next page:
  - **Website Settings:** Default Web Site
  - **Create Virtual Directory:** Selected
  - **Virtual Directory Name:** AcumaticaMultitenant
  - **Use Existing Application Pool:** Selected
  - List of existing application pools: DefaultAppPool
 Leave the other settings without changes.
9. On the Confirmation of Configuration page, click **Finish**, and wait while the new application instance is created.
10. After the installation is completed, click **OK** in the dialog box to return to the Acumatica ERP Configuration wizard.
11. Click **Perform Application Maintenance**.

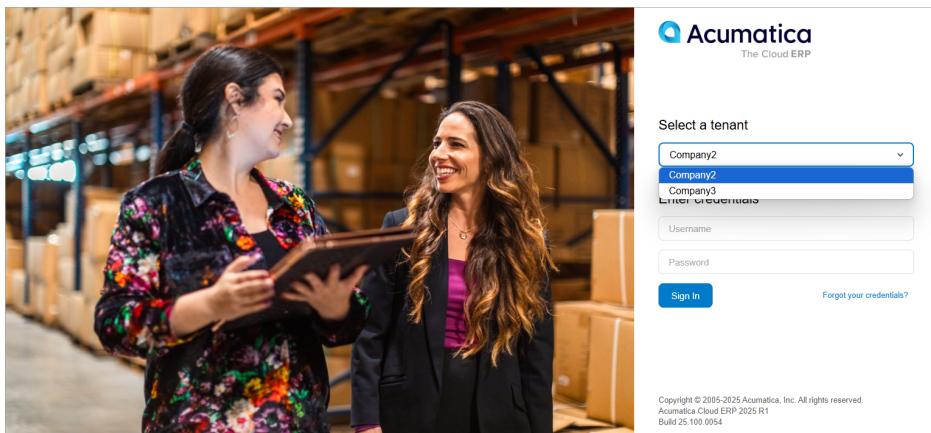
On the Application Maintenance page, which opens, the list of existing application instances now contains three sites: *AcumaticaT100*, *AcumaticaS100*, and *AcumaticaMultitenant*, as shown in the following screenshot.



**Figure: The list of the application instances**

12. Click the row with the *AcumaticaMultitenant* instance, and then click **Launch**.

The instance opens in a new tab of your default browser. Notice that the instance's Sign-In page has the tenant selection box above the **Sign In** button with the *Company2* and *Company3* tenants you have created in this step, as shown in the following screenshot.



**Figure: The Sign-In page with the tenant selection box**

## Step 2: Setting Up Tenant Visibility

To make changes to tenants of the created instance, do the following:

1. Go back to the Acumatica ERP Configuration wizard.
2. On the Application Maintenance page, click the row with the *AcumaticaMultitenant* instance, and click **Maintain Tenants**.
3. In the SQL Server Authentication dialog box, leave **Windows Authentication** selected, and click **OK**.  
The Tenant Setup page is displayed for the selected instance.
4. Click **Create** to add one more tenant to the instance.

The system adds a new row with the *Company4* tenant to the list.

- Select the **Secure Tenant on the Sign-In Page** check box.

This hides the tenant selection box on the Sign-In page until a user enters a username and password. After the user is authorized, the system displays the tenant selection box with the list of tenants to which the user can sign in.

- In the row with *Company3* tenant, clear the check box in the **Visible** column.

This makes the tenant invisible to all users. Only the *Company2* and *Company4* tenants have the **Visible** check box selected, as shown in the following screenshot.

ID	Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
1	Company	<input type="checkbox"/>	<input type="button" value="▼"/>	<input type="button" value="▼"/>	<input type="checkbox"/>	1
2	Company2	<input type="checkbox"/>	<input type="button" value="▼"/>	<input type="button" value="1"/>	<input checked="" type="checkbox"/>	Company2
4	Company3	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>	<input type="button" value="2"/>	<input type="checkbox"/>	Company3
5	Company4	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>	<input type="button" value="1"/>	<input checked="" type="checkbox"/>	Company4

On this page, you create tenants. If you want to create a multitenant site, add rows with the appropriate settings for each required tenant.

Advanced Settings  Secure Tenant on the Sign-In Page

Version: 25.100.0054 <https://www.acumatica.com>

Figure: The restriction of tenant visibility on the Sign-In page

- Click **Next**.

- On the Confirmation of Configuration page, click **Finish**.

- After the application instance is updated, click **OK** in the dialog box to return to the Acumatica ERP Configuration wizard.

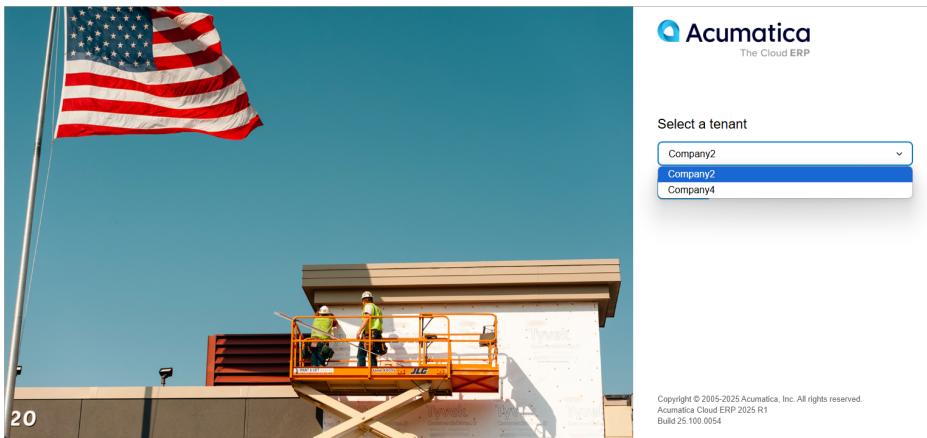
- Click **Perform Application Maintenance**.

- On the Application Maintenance page, click the row with the *AcumaticaMultitenant* instance, and click **Launch**.

The instance opens in a new tab of your default browser. Notice that the instance Sign-In page does not have the tenant selection box.

- Enter the default username and password for the application instance (*admin* and *setup*, respectively).

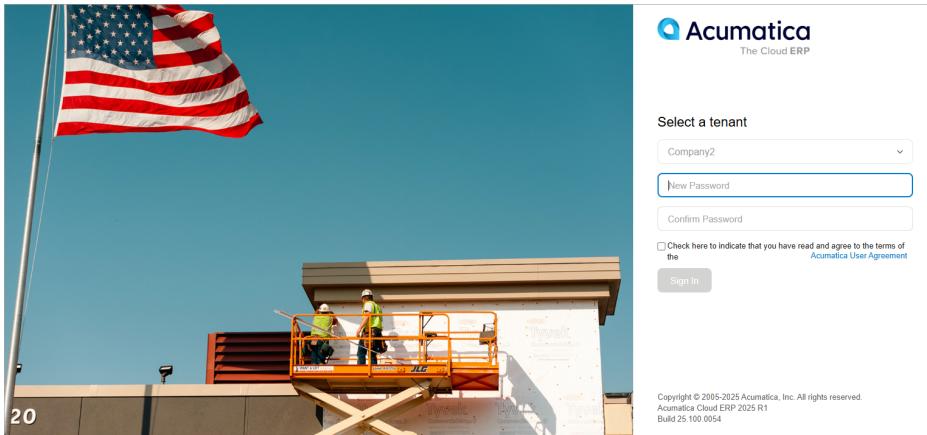
Because the *admin* user has access to all the tenants you have created, the tenant selection box is displayed for the user. Notice that only *Company2* and *Company4* are available for signing in, as shown in the following screenshot.



**Figure: The tenant selection box on the Sign-In page**

**13. Select the *Company2* tenant in the tenant selection box and click **Sign In**.**

The Sign-In page refreshes and shows the read-only tenant selection box with the selected *Company2* tenant. The system prompts you to enter a new password and confirm it, as shown in the following screenshot.



**Figure: Creation of a new password for a tenant in a multitenant instance**

**14. Enter a new password and confirm it.**

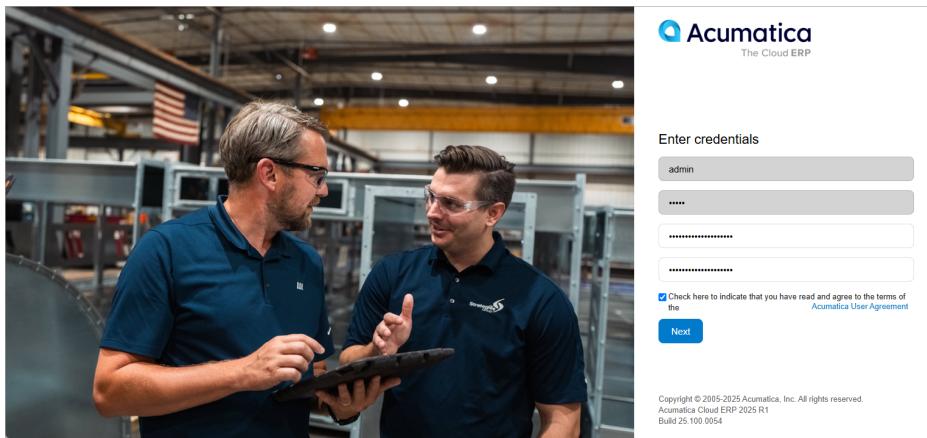
**15. Click the link of the Acumatica User Agreement above the **Sign In** button, read the agreement, and then select the check box to indicate that you have read the terms of the agreement and agree to them.**

**16. Click **Sign In**.**

You have signed in to the *AcumaticaMultitenant* instance. Now you can work within the *Company2* tenant.

**17. Sign out.**

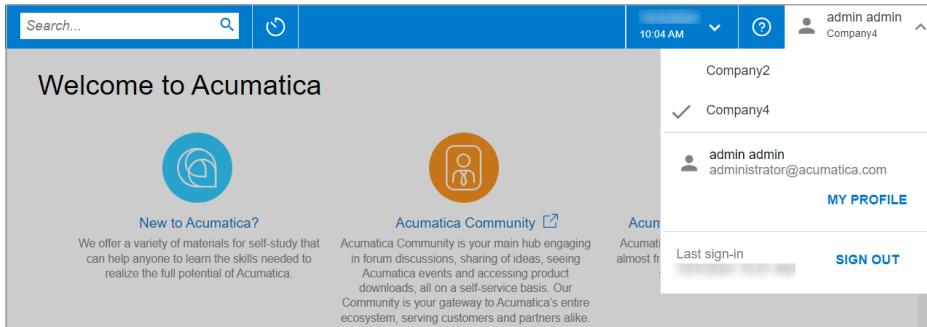
**18. On the Sign-In page, enter the default username and password for the application instance (*admin* and *setup*, respectively) to access the *Company4* tenant. Since the *admin* user has access to all the tenants you have created, the system prompts you to change the default password for the *Company4* tenant, as shown in the following screenshot. Notice that because you have entered the default password, the tenant selection box for the remaining *Company4* tenant does not appear.**



*Figure: Creation of a new password for another tenant in a multitenant instance*

#### 19. Change the password and click **Next**.

You have signed in to the *AcumaticaMultitenant* instance. Now you can work within the *Company4* tenant. You can also switch to the *Company2* tenant in the user menu, as shown in the following screenshot.



*Figure: Access to multiple tenants*

### Step 3: Deleting an Existing Tenant

In this step, you will delete the unnecessary tenant by doing the following:

1. Return to the Acumatica ERP Configuration wizard.
2. While you are viewing the Application Maintenance page, do the following:
  - a. In the **Installed Sites** list, click the row with the *AcumaticaMultitenant* instance.
  - b. Click **Maintain Tenants**.
3. In the **SQL Server Authentication** dialog box, leave **Windows Authentication** selected, and click **OK**.
4. On the Tenant Setup page, select the row with the *Company4* tenant in the **Installed Tenants** list.
5. Click **Delete**.
6. Click **OK** in the confirmation dialog box to delete the tenant.
7. Click **Next**.
8. On the Confirmation of Configuration page, do the following:
  - a. Check the configuration settings you have specified.
  - b. Click **Finish** to delete the tenant.

## Tenant Maintenance: To Explore Tenant Visibility

The following activity will walk you through the process of exploring how tenant visibility affects the existing Acumatica ERP application instance.

### Story

Suppose that you are the system administrator of your company, and you have been asked to add a new tenant to the existing Acumatica ERP application instance. You will explore how to use the visible tenant as a parent tenant. Additionally, you will verify the capability of having an instance where all tenants are invisible.

### Process Overview

In this activity, you will explore the visible capabilities of tenants.

### System Preparation

Before you begin performing the step of this activity, make sure that you have performed the following prerequisite activity: [Instance Deployment: To Deploy an Instance with Demo Data](#).

### Step: Exploring the Capabilities of Tenant Visibility

To explore the capabilities of tenant visibility, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. In the list of existing application instances, select the row with the *AcumaticaT100* instance, and click the **Maintain Tenants** button.
4. In the SQL Server Authentication dialog box, leave the default settings, and click **OK**.  
This opens the Tenant Setup page, which shows the full list of tenants for the selected application instance.
5. Select the **Advanced Settings** check box below the list of tenants.

The system displays the default *System* tenant with an **ID** of 1 in the list of tenants.



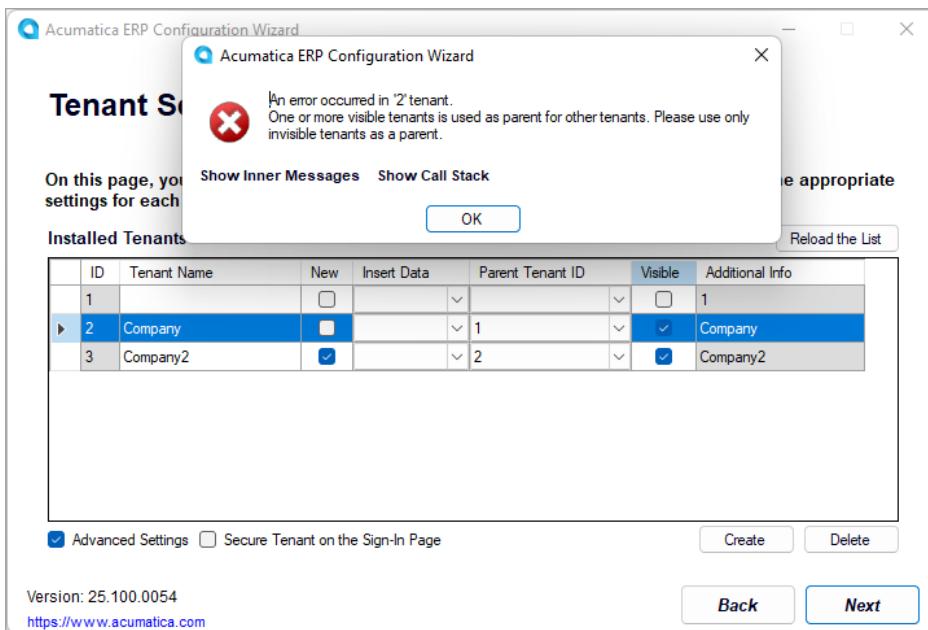
With the **Advanced Settings** check box selected, you can also select a new data template in the **Insert Data** column for an existing tenant. If you finish updating the tenant, the Acumatica ERP Configuration wizard replaces the tenant data with the data of the selected template.

6. Clear the **Visible** check box in the row with the *Company* tenant, and click **Next**.

The system displays a warning informing you that you cannot continue with all the instance's tenants being invisible.

7. In the warning dialog box, click **OK**.
8. On the Tenant Setup page, to which you return, do the following:
  - a. Click **Create** below the list of tenants to add one more tenant.
  - b. For the new tenant, select 2 in the **Parent Tenant ID** column.
  - c. Select the **Visible** check box in the row with the *Company* tenant.
  - d. Click **Next**.

The system displays an error message informing you that you cannot continue because only an invisible tenant can be specified as a parent of another tenant, as shown in the following screenshot.



**Figure: The error message**

9. In the dialog box, click **OK**.

The system automatically clears the **Visible** check box in the row with the *Company* tenant.

10. On the Tenant Setup page, to which you return, do the following:

- a. Make sure that the **Visible** check box is selected only in the row with the new tenant, and that 2 is selected as the **Parent Tenant ID** in this row.
- b. Click **Next**.

11. On the Confirmation of Configuration page, review your changes, and click **Finish**.

12. Wait while the application instance settings are updated, and click **OK**.

# Lesson 5: Maintaining Instances

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In this lesson, you will learn how to perform maintenance tasks with Acumatica ERP instances and their databases.

## Instance Maintenance: General Information

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In Acumatica ERP, you can review and adjust various settings of the instance, such as its name or database.

This topic provides an overview of the adjustments that you can make to existing instances and databases by using the Acumatica ERP Configuration wizard.

### Learning Objectives

In this lesson, you will do the following:

- Check the state of Acumatica ERP application instances and their databases
- View the settings of an Acumatica ERP instance
- Change the name of an Acumatica ERP instance
- Change a database in an Acumatica ERP instance

### Applicable Scenarios

You may need to learn how to make some changes in an Acumatica ERP instance in scenarios that include the following:

- You are a system administrator who needs to link the existing Acumatica ERP instance to a new database.
- You are a system administrator who needs to view some settings of the Acumatica ERP instance and change its name.

### Viewing of an Instance's Settings

You can view the following settings of an existing Acumatica ERP instance on the Instance Information page of the Acumatica ERP Configuration wizard:

- **Instance Name**
- **Instance Type**, which can be *RegularSite* to indicate Acumatica ERP or *CompanyPortal* to indicate the Acumatica Self-Service Portal.
- **Instance File Path**
- **Database**
- **Database Version**
- **Files Version**
- **Instance URL**
- **Website Name**
- **Virtual Directory Name**

You can open the Instance Information page as follows:

1. Run the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. Select the row with the instance whose settings you wish to review.

#### 4. Click **Review Instance Info**.

On the Instance Information page, the instance and virtual directory names can be edited. The Instance Information page also provides quick access to the folder where the files of this instance are stored. Additionally, you can create a shortcut for the instance URL to get quick access to the site.

### Changing of the Instance Database

You can change the database of an existing Acumatica ERP instance—for example, if you want to switch to a backup database. You can also associate the application instance with a new database and create it on the fly. To create a new database, you can use the **Perform Database Maintenance** option on the Welcome page of the Acumatica ERP Configuration wizard. For more details, see [To Perform Database Maintenance](#).

When you connect the application instance to another existing database, the version of the database is checked. The versions of the database and the Acumatica ERP Configuration wizard must be the same. If the database has a lower version, you must update it to correspond to the Acumatica ERP Configuration wizard version. This can be done during the process of changing the database. This will also require you to update the instance site.

### Instance Maintenance: Possible Update Statuses of an Instance

In Acumatica ERP, you can see which instances and databases you need to update.

You can check the update status of your application instances and databases on the Application Maintenance page of the Acumatica ERP Configuration wizard, as shown in the following screenshot.

Instance Name	Database	Site Version	DB Version	Site Path
⚠️ AcumaticaMultitenant	\AcumaticaM...	25.100.0054	25.100.0054	C:\Program Files\Acumatica ERP\AcumaticaM...
✓ AcumaticaS100	\AcumaticaS...	25.101.0090	25.101.0090	C:\Program Files\Acumatica ERP\AcumaticaS...
✗ AcumaticaTraining	\Acumati...	25.100.0...	25.101.0...	C:\Program Files\Acumatica ERP\Acur...

**Figure: The icons indicating the update statuses of instances**

In the list of installed sites, you can see the following icons indicating the update status of each application instance:

- *Green check mark:* The instance and the associated database are up to date. (Also, the versions of the application instance, the database, and the Acumatica ERP Configuration wizard are the same.)

- *Yellow triangle with exclamation point:* The instance and the instance database are outdated. (That is, the version of the application instance is the same as the version of the database and is older than the version of the installed Acumatica ERP Configuration wizard.) The application instance will still work, even if the instance and database are out of date.
- *Red circle with a white X:* The instance or the instance database requires an update; that is, the versions of the instance and the instance's database are different. The application instance does not work, and you must update it, or update only the instance or the instance database if their versions are outdated.

This icon is also displayed when the database of the instance has not been found, or when the version of the instance, the database, or both is higher than the current version of the Acumatica ERP Configuration wizard.

On the Application Maintenance page, you can also see the following information:

- The version of the Acumatica ERP Configuration wizard that is installed on your server. The version is shown in the lower left corner of the page.
- The application instance version, which is displayed in the **Site Version** column for each application instance.
- The database version, which is displayed in the **DB Version** column for each application instance.

Note the following points about versions:

- The site version and the database version must be the same.
- The Acumatica ERP Configuration wizard version cannot be lower than the site or database version. That is, you first upgrade the Acumatica ERP Configuration wizard, and you may then upgrade the site and the database. If you do not upgrade the site and the database, they will continue functioning.
- You can upgrade only the site, only the database, or both the site and the database.
- You cannot use the Acumatica ERP Configuration wizard with a higher version to deploy an application instance with a lower version.
- Versions of the system that are lower than the current version can be installed only by first uninstalling the current version of the Acumatica ERP Configuration wizard and then installing the desired version. The instances with a higher version will remain functional.

## Instance Maintenance: To View the Settings of an Instance

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The following activity will walk you through the process of viewing and modifying the settings of the Acumatica ERP application instance.

### Story

Suppose that you are the system administrator of your company, and you need to review the settings of the existing Acumatica ERP application instance and change its name.

### Process Overview

In this activity, you will review the settings of the *AcumaticaT100* application instance and change the instance name.

### System Preparation

Before you begin performing the step of this activity, make sure that you have performed the following prerequisite activity: [Instance Deployment: To Deploy an Instance with Demo Data](#).

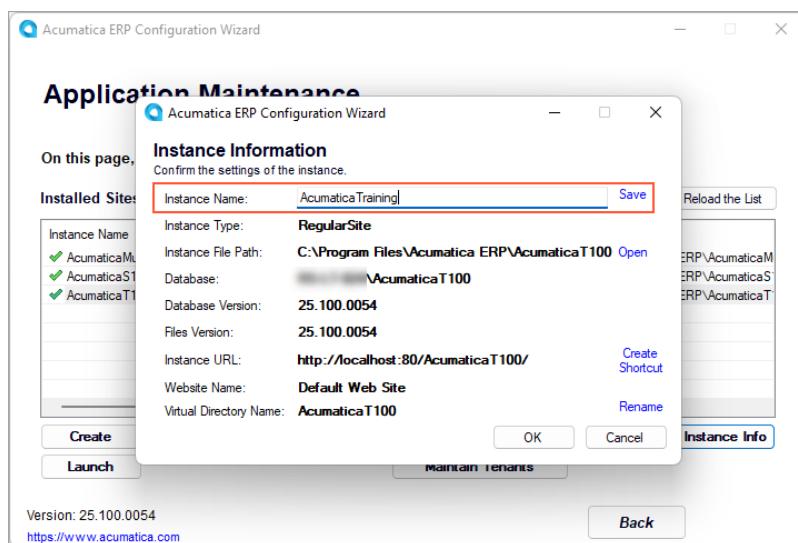
## Step: Changing the Settings of an Application Instance

To review the settings of the instance and change its name, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. In the list of existing application instances, click the row with the *AcumaticaT100* instance, and then click the **Review Instance Info** button.

This opens the Instance Information page.

4. To change the instance name, do the following:
  - a. Right of the **Instance Name** box, click **Rename**.
  - b. Change the name of the instance to *AcumaticaTraining*, as shown in the following screenshot.



*Figure: The updated instance name*

- c. Right of the **Instance Name** box, click **Save**.
5. Right of the **Instance Files Path** box, click **Open**.

This opens the folder where the selected application instance is installed. In particular, this folder contains the `web.config` file of the current instance.

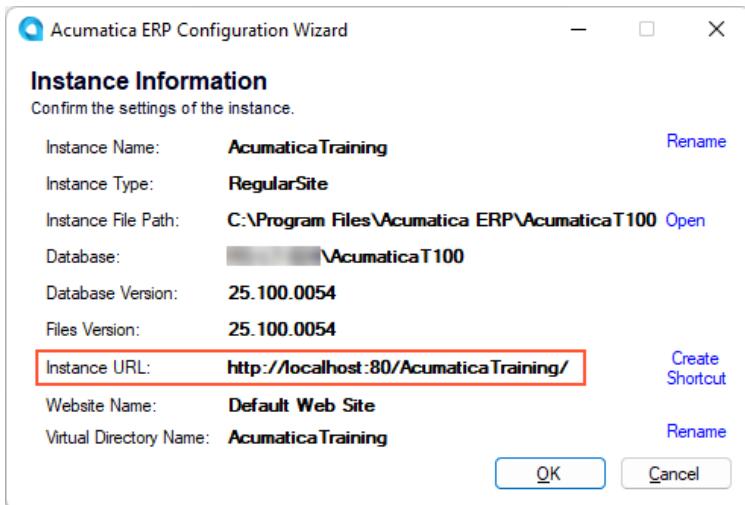
6. To change the virtual directory name, go back to the Acumatica ERP Configuration wizard, and do the following:

- a. Right of the **Virtual Directory Name** box, click **Rename**.
- b. Change the virtual directory name to *AcumaticaTraining*.
- c. Right of the **Virtual Directory Name** box, click **Save**.

7. Click **OK** to save your changes.
8. In the dialog box with the notification message, click **OK**.

This closes the Instance Information page and returns you to the Application Maintenance page.

9. Open the Instance Information page again and notice that the URL of the renamed *AcumaticaTraining* instance has also been updated, as shown in the following screenshot.



*Figure: The updated URL of the instance*

## Instance Maintenance: To Change the Database of an Instance

The following activity will walk you through the process of changing the database for an existing Acumatica ERP application instance.

### Story

Suppose that you are the system administrator of your company, and you need to change the database of the existing Acumatica ERP application instance to perform some maintenance activities on the original database.

### Process Overview

In this activity, you will change the database of the *AcumaticaTraining* application instance and connect the instance to the *AcumaticaS100* database.

### System Preparation

Before you begin performing the step of this activity, make sure that you have performed the following prerequisite activity: [Instance Maintenance: To View the Settings of an Instance](#).

### Step: Changing the Database

To change the database of the existing application instance, do the following:

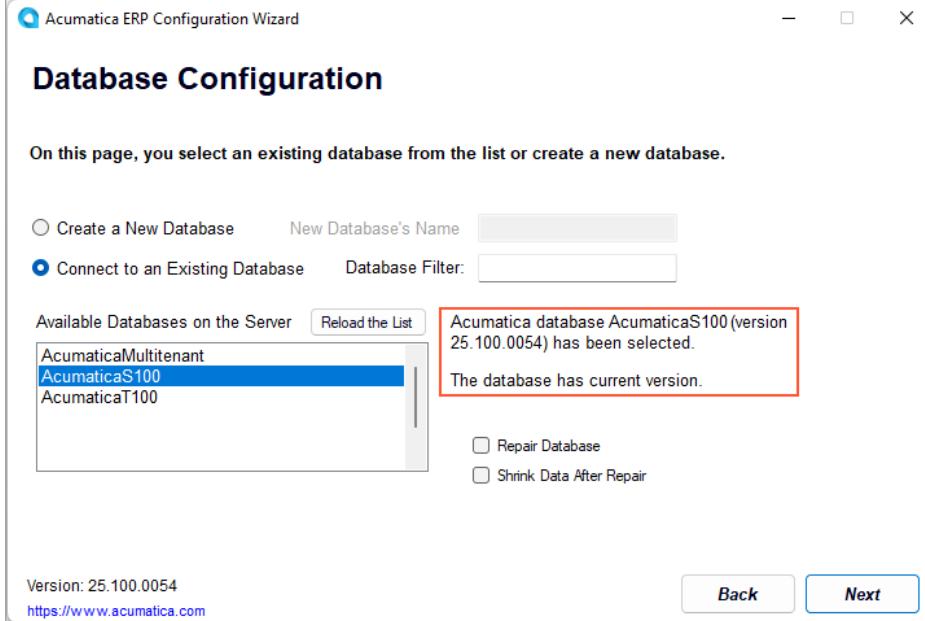
1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. In the list of existing application instances, click the row with the *AcumaticaTraining* instance, and click the **Change Database** button.

This opens the Database Server Connection page, which provides a list of available servers.

4. On the Database Server Connection page, specify the following settings, and click **Next** to go to the next page:
  - **Server Type:** Microsoft SQL Server

- **Server Name:** *(local)*
  - **Windows Authentication:** Selected
5. On the Database Configuration page, specify the following settings, and click **Next** to go to the next page:
- **Connect to an Existing Database:** Selected
  - **Available Databases on the Server:** *AcumaticaS100*

Notice that the version of the selected database is automatically detected (as shown in the following screenshot), and it is the same version that the Acumatica ERP Configuration wizard has.



*Figure: The selection of an existing database*

6. On the Tenant Setup page, click **Next**.
7. On the Database Connection page, click **Next**.
8. On the Confirmation of Configuration page, review your changes (see the following screenshot), and click **Finish**.

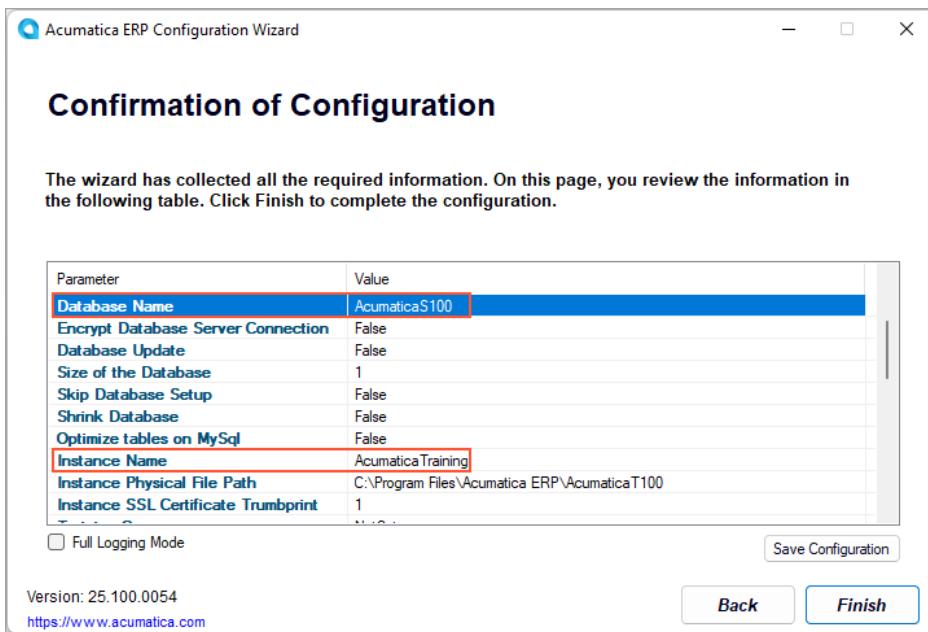


Figure: The changed database

9. Wait while the application instance settings are updated, and click **OK** in the confirmation dialog box.
10. On the Welcome page of the Acumatica ERP Configuration wizard, which opens, click **Perform Application Maintenance**.
11. On the Application Maintenance page, notice the values in the **Database** column. Two instances (*AcumaticaS100* and *AcumaticaTraining*) are now connected to the same *AcumaticaS100* database, as shown in the following screenshot.

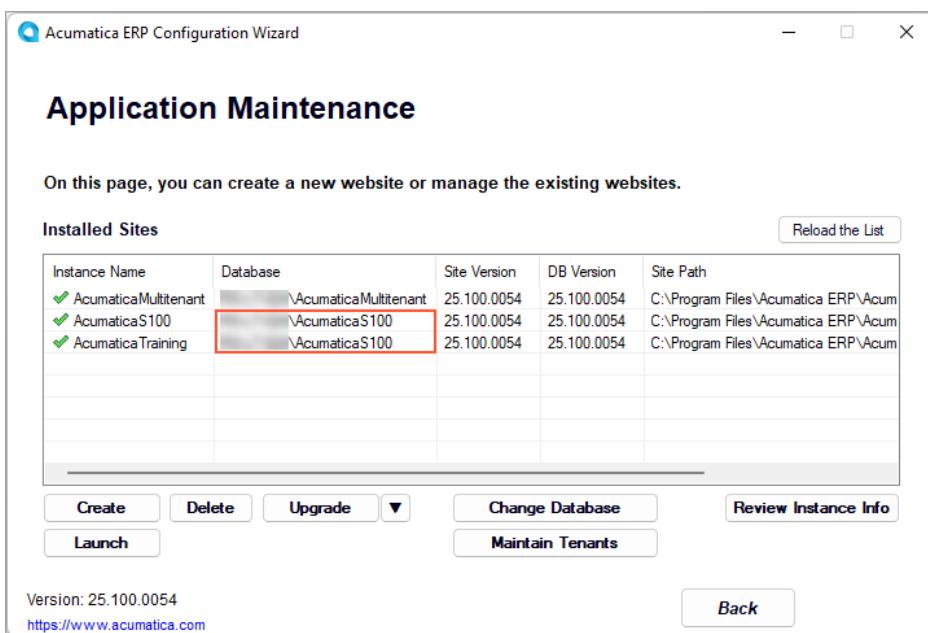


Figure: The connection of the instances to the same database

# Lesson 6: Upgrading Acumatica ERP

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In this lesson, you will learn about upgrading Acumatica ERP.

## Upgrading of Acumatica ERP: General Information

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You can upgrade Acumatica ERP by installing a new major version of the system. You can also update Acumatica ERP by installing an update with a new minor version of the system. A major version provides functional enhancements and new features. A minor version includes fixes for reported issues and occasionally functionality improvements. Both major and minor versions are distributed in builds, which are installation packages of the system. Builds are cumulative—each new build includes everything from the previous builds, along with any new fixes. This eliminates the need to install previous builds before installing the latest one.

To upgrade or update Acumatica ERP, you need to first upgrade or update the Acumatica ERP Configuration wizard to the needed version.

This topic provides an overview of upgrading and updating Acumatica ERP.

### Learning Objectives

In this lesson, you will do the following:

- Install the next version of the Acumatica ERP Configuration wizard
- Update an application instance to the next version of Acumatica ERP

### Applicable Scenarios

You may need to learn how to upgrade or update Acumatica ERP in scenarios that include the following:

- You are a system administrator who needs to upgrade Acumatica ERP to the latest product version.
- You are a system administrator who needs to update one of the Acumatica ERP instances to the next product version.

### Before You Proceed

We strongly recommend that before you upgrade or update Acumatica ERP to a newer product version, you do the following:

1. Back up all configuration files and databases used by the application instances.
2. If you have been replicating the Acumatica ERP database, turn off the replication. (Otherwise, the system cannot be updated.)
3. If you developed a client application by using the screen-based SOAP API, follow the procedure described in [To Update a Client Application that Uses Screen-Based Web Services](#) to prevent a failure of your application that can happen because of the UI changes in the system.
4. On the [Automation Schedule Statuses](#) (SM205030) form, make sure that no processes are scheduled for the update time. If you find any scheduled processes, reschedule them so that they start after the update.
5. On the [Tenants](#) (SM203520) form, click **Optimize Database** to check your Acumatica ERP database for orphaned snapshots, and delete any that the system finds.

## Upgrading Process

The general process of system upgrading (to a major version) or updating (to a minor version) by using the Acumatica ERP Configuration wizard, which has already been installed on the server, is the following:

1. If necessary, notify users about the upcoming upgrade or update and automatically lock out the system for the time of the upgrade or update on the [Apply Updates](#) (SM203510) form, as described in [Upgrading of Acumatica ERP: To Schedule the System Lockout](#). A message alerting users to the system lockout will be displayed on the Sign-In page.



When the lockout is in effect, the following happens in the system:

- Only users that have the *Administrator* role can sign in to the system.
- The system stops all processes that were run by a schedule.

2. Obtain the needed Acumatica ERP build in the [Acumatica Community](#) website. You need to use your partner's username and password to access the site. Download an installation package, and run it to upgrade or update the Acumatica ERP Configuration wizard.

The procedure is the same as the procedure for installing Acumatica ERP Configuration wizard. For details, see [Acumatica ERP Installation On-Premises: General Information](#).

3. Start upgrading or updating the database and the site of your application instance. The system will automatically perform the following actions:

- a. For instances that contain published customization projects, validating the compatibility of the currently published customization code with the code of the new product version. If the validation is successful, the system upgrade or update the database and the site. If the validation fails, the **Validation Failed** window opens to display the list of the executed checks and the discovered errors, and the upgrade process is interrupted. To resolve any issues that were discovered, see [To Resolve an Issue Discovered During the Validation](#).

- b. Upgrading or updating the database and site of the instance.

If you need to upgrade or update the database without upgrading or updating the site or to upgrade or update only the site (without the database), see the next section in this topic.



We strongly recommend that you use the common procedure described in this section for a usual upgrade or update of your Acumatica ERP application instance.

The time required for the upgrade or update depends on the performance of your database server, the differences between the old and current versions of the database schema, the hardware configuration of the server, and the current system load. When the upgrade or update of the instance is finished, the Acumatica ERP Configuration wizard updates the list of instances.

4. If you are upgrading or updating your system from a version that did not include search indexes, you need to build search indexes by using the [Rebuild Full-Text Entity Index](#) (SM209500) form. If the system has search indexes that were built before the upgrade or update, we recommend rebuilding search indexes by using the form. For details, see [Building Search Indexes](#).
5. If you are locked out the system, unlock the system on the [Apply Updates](#) form, as described in [Upgrading of Acumatica ERP: To Unlock an Acumatica ERP Instance](#).

## Separate Upgrade of the Database and the Site

You might need to upgrade or update the Acumatica ERP database without upgrading or updating the site, upgrade or update only the site, or consequently upgrade or update the database and the site.



If you need to upgrade or update the Acumatica ERP application instance and the Self-Service Portal instance that is connected to the database of the Acumatica ERP application instance, you can first upgrade or update the Acumatica ERP application instance (that is, the website and the database) and then the site of the Self-Service Portal. You can also upgrade or update the Self-Service Portal with its database and then upgrade or update only the site of the Acumatica ERP application instance.

To do the divided upgrade or update, you can use the **Upgrade Only Website** and **Upgrade Only Database** commands, which you can find in the drop-down list to the right of the **Upgrade** button on the Application Maintenance page of the Acumatica ERP Configuration wizard. For details, see [Upgrading of Acumatica ERP: To Update the Database of an Acumatica ERP Instance](#) and [Upgrading of Acumatica ERP: To Update an Acumatica ERP Site](#).



When you upgrade or update your Acumatica ERP instance by using the **Upgrade Only Website** or **Upgrade Only Database** commands, the system does not validate the customization compatibility. If you have published customization projects in your Acumatica ERP instance, the instance may stop working after an upgrade or update because of incompatible customization code. For details, see [To Resolve Issues While Upgrading a Customized Website](#).

## Upgrading of Acumatica ERP: To Update an Instance

The following activity will walk you through the process of updating the database and site of an Acumatica ERP application instance to the next minor version by using Acumatica ERP Configuration wizard.

### Story

Suppose that you are the system administrator of your company, and you need to update the existing Acumatica ERP application instance to the next minor version.

### Process Overview

In this activity, you will update the *AcumaticaS100* instance from the previous version to a newer version.

### System Preparation

Before you begin performing the steps of this activity, make sure that you have completed the [Instance Deployment: To Deploy an Instance with Demo Data](#) prerequisite activity.

### Step 1: Obtaining an Installation Package with a Newer Version of Acumatica ERP

To download an installation package with a newer version of Acumatica ERP and install it, do the following:

1. Open the [Acumatica Community](#) website.  
You will need your partner's username and password to access the site.
2. On the **Product** menu at the top of the page, click **2025 R1**.

The Acumatica ERP 2025 R1 Downloads and Release Notes page opens. On this page, you can find the latest release and prior releases of the selected version and read the release notes.

3. To download the Acumatica 2025 R1 Update 1, click the *Show content* link in the **Prior Releases** section.
4. Click the *Acumatica 2025 R1 Update 1 Build XX.XXX.XXXX* link.

The page with the release opens.

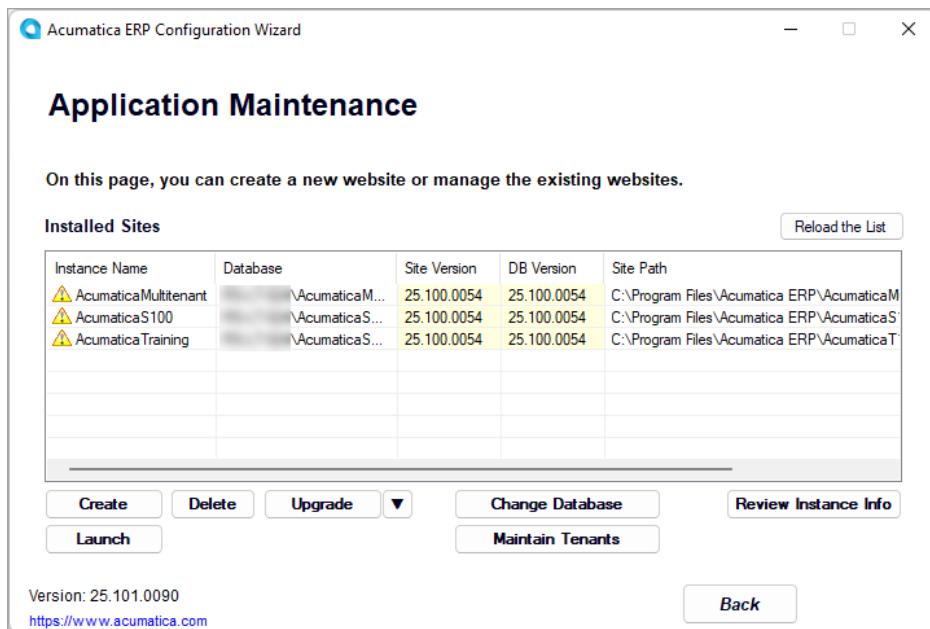
5. In the **Download Links** section, click the *Acumatica ERP 2025 R1 Update 1* link to download the *AcumaticaERPIinstall.msi* Windows installer package.
6. Install the newer version of the Acumatica ERP Configuration wizard, as described in [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard](#).

## Step 2: Updating an Instance

To update the *AcumaticaS100* instance from the previous version to the one you have just installed, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Perform Application Maintenance**.

On the Application Maintenance page, which opens, in the list of existing application instances, notice that all the instances have yellow triangles with exclamation points, as shown in the following screenshot.



*Figure: The list of instances*

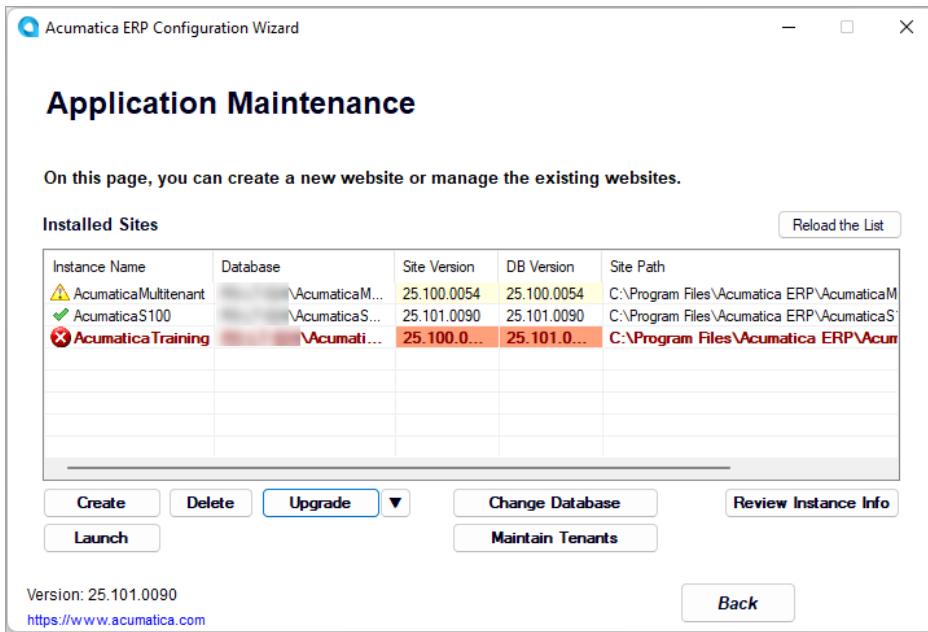
3. In the list of application instances, click the row with the *AcumaticaS100* instance, and click the **Upgrade** button.
4. In the confirmation dialog box, click **Yes** to continue the update.
5. In the **SQL Server Authentication** dialog box, which opens during the upgrade, leave the **Windows Authentication** option button (which is selected by default), and click **OK** to start the update.

The time required for the update depends on the performance of your database server, the differences between the old and current versions of the database schema, the hardware configuration of the server, and the current system load.



During the upgrade or update, the system may ask you to stop the application pool that is used for the instance. If it does, click **Yes** to proceed.

When the update of the instance is finished, the Acumatica ERP Configuration wizard updates the list of instances, as shown in the following screenshot. Notice that the updated instance now has a green check mark, which tells you that it has updated successfully; the instance and the associated database are up to date.



**Figure: The green check mark indicating the successful update of the instance**

The *AcumaticaS100* site and its database have the same version as the Acumatica ERP Configuration wizard does, which is indicated by the green check mark.

The *AcumaticaMultiple* site and its database have the same version, but it is lower than the version of the Acumatica ERP Configuration wizard, which is indicated by an exclamation point in a yellow triangle.

The *AcumaticaTraining* site and its database have different versions because the database is used by the *AcumaticaS100* instance and has been updated. This is indicated by a red circle with a white X.

# Lesson 7: Using the Command-Line Tool

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In this lesson, you will learn about creating an Acumatica ERP instance and performing maintenance tasks on the instance by using the command-line tool.

## Acumatica ERP Command-Line Tool: General Information

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In Acumatica ERP, you can deploy a new application instance and perform database and application maintenance tasks by using the command-line tool.

This topic provides an overview of how you can use the Acumatica ERP command-line tool instead of the Acumatica ERP Configuration wizard.

### Learning Objectives

- Become familiar with the Acumatica ERP command-line tool and its syntax
- Review some examples of using command-line commands to deploy instances and perform maintenance tasks by using the Acumatica ERP command-line tool
- Deploy an out-of-the-box Acumatica ERP instance from a configuration file by using the Acumatica ERP command-line tool

### Applicable Scenario

You may need to learn how to use the Acumatica ERP command-line tool if you are a system administrator who prefers to use command-line commands to deploy a new instance and to perform some maintenance tasks without using the Acumatica ERP Configuration wizard.

### The Acumatica ERP Command-Line Tool

The Acumatica ERP command-line tool is an executable file with the `ac.exe` name. By default, `ac.exe` is located in the folder on the computer that has Acumatica ERP installed, which is `C:\Program Files (x86)\Acumatica ERP\Data\`.

When you run `ac.exe`, you supply a set of command-line parameters, where each parameter must be presented in the following format.

```
-parameter:"parameter value"
```

When you pass a command-line command to the Acumatica ERP command-line tool, you should use the following syntax.

```
ac.exe [-f|-file:"path to configuration file"] [-cm|-configmode:"main scenario"]
[-s|-dbservername:"server name"] [-sw|-dbsrwinauth:"True|False"]
[-u|-dbsrvuser:"username"] [-p|-dbsrvpass:"user password"]
[-d|-dbname:"database name"] [-n|-dbnew:"True|False"]
[-b|-dbupdate:"True|False"] [-dm|-dbmode:"Regular|Template|Demo"]
[-dz|-dbsize:"database size in GB"] [-ds|-dbskip:"True|False"]
[-dc|-dbshrink:"True|False"] [-i|-iname:"instance name"]
[-io|-ioldname:"old instance name"] [-h|-ipath:"instance directory"]
[-is|-vmsize:"Small|Medium|Large|ExtraLarge"]
[-it|-trumbprint:"X.509 thumbprint"] [-w|-swebsite:"Web site name"]
```

```

[-v|-svirtdir:"virtual directory"] [-po|-spool:"application pool"]
[-a|-sactions:"AnonymousUser|SelectedUser"]
[-k|-suser:"username"] [-m|-spass:"user password"]
[-dw|-dbwinauth:"True or False"] [-dn|-dbnewuser:"True|False"]
[-du|-dbuser:"username"] [-dp|-dbpass:"user password"]
[-cs|-securemode:"True|False"] [-c|-company:"[ci|CompanyID=company ID];
[cp|ParentID=parent company ID]
[cv|Visible=True];[ct|CompanyType=True]; [cn|LoginName:username];
[cd|Delete=True]"] [-op|-output:"Normal|Quiet|Forced"]

```

All parameter values in the command-line commands are case-sensitive and must be enclosed in quotation marks. Each parameter for the command line also has a short form that you can use instead of the full parameter name. If you have specified a parameter more than once in a command line, the last parameter value will be used.

You can run `ac.exe` in one of three modes:

- *Command-line*: Parameters are passed to `ac.exe` from the command line.
- *Batch*: The path to the configuration file with parameters is passed to `ac.exe` from the command line.
- *Mixed*: Some parameters are passed to `ac.exe` through the configuration file, while other parameters are passed from the command line. In this mode, command-line parameters have priority over those specified in the configuration file.

For details about possible parameters and their values, see [Acumatica ERP Command-Line Tool: Possible Parameters and Values](#).

## Deployment of an Instance by Using the Acumatica ERP Command-Line Tool

You can use a configuration file to deploy an Acumatica ERP instance with the Acumatica ERP command-line tool. You can create the configuration file with the command-line commands automatically by running the Acumatica ERP Configuration wizard. For details, see [Acumatica ERP Command-Line Tool: To Deploy an Instance by Using the Configuration File](#).

You can also deploy an instance manually by using the command-line commands that you pass to `ac.exe`, as shown in the following examples:

- ```

ac.exe -configmode:"NewInstance" -dbsrvname:"GP" -dbname:"JPMorgan"
-company:"CompanyID=1;CompanyType=;LoginName=;"
-company:"CompanyID=2;CompanyType=;ParentID=1;Visible=Yes; LoginName=JPMorgan;"
-iname:"JP Morgan" -ipath:"C:\Program Files\Program Folder\JP Morgan\\"
-swebsite:"Default Web Site" -svirtdir:"JPMorgan" -spool:"JPMorgan"
-sactions:"SelectedUser" -suser:"GP\Administrator"

```
- ```

ac.exe -cm:"NewInstance" -s:"SM" -d:"InstanceDB" -c:"ci=1;"
-c:"ci=2;cp=1;ct=Demo;cv=True;cn=Company;" -i:"Instance"
-h:"C:\Program Files (x86)\Program Folder\Instance" -w:"Default Web Site"
-v:"Instance" -po:"Classic .NET AppPool" -a:"AnonymousUser"

```

The command in this example also creates an application instance and uses the short forms of the command-line parameters.

## Maintenance of an Instance by Using the Command-Line Commands

You can use the following examples of command-line commands, which you pass to `ac.exe` to perform some maintenance tasks in Acumatica ERP.

The following command updates an existing database.

```
ac.exe -configmode:"DBMaint" -dbsrvname:"SM" -dbnew:"False" -dbname:"DotNet4"
```

```
-dbupdate:"True"
```

The following command updates an existing application instance.

```
ac.exe -cm:"UpgradeSite" -i:"Instance"
```

The following commands can be used to switch on full logging mode and save full logs of instance updates in the Logs folder of the Acumatica ERP installation folder:

- Short parameter name: ac.exe -fl:"Yes"
- Full parameter name: ac.exe -fulllog:"Yes"

For details about full logging mode, see [Instance Deployment: Creation of an Instance](#).

## Acumatica ERP Command-Line Tool: To Deploy an Instance by Using the Configuration File

The following activity will walk you through the process of preparing a configuration file by using the Acumatica ERP Configuration wizard. You will then deploy an Acumatica ERP instance from this configuration file by using the Acumatica ERP command-line tool.

### Story

Suppose that you are the system administrator of your company and you need to deploy an out-of-the-box Acumatica ERP instance from a configuration file by using the command-line tool.

### Process Overview

In this activity, you will create a configuration file by using the Acumatica ERP Configuration wizard. Then you will deploy an out-of-the-box Acumatica ERP instance from this configuration file by using the command-line tool.

### System Preparation

Before you begin performing the step of this activity, you should do the following:

- Make sure that you have completed the [Acumatica ERP Installation On-Premises: To Install the Acumatica ERP Configuration Wizard](#) prerequisite activity.
- Make sure that a command-line utility has been installed on your computer.



You can use Command Prompt, the built-in command-line utility for Microsoft Windows.

### Step 1: Creating the Configuration File by Using the Acumatica ERP Configuration Wizard

To create a configuration file with the settings of an Acumatica ERP instance, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the wizard pages, specify the settings to deploy an out-of-the-box instance, as described in [Instance Deployment: To Deploy an Out-of-the-Box Instance](#).

In the **Instance Name** box on the Instance Configuration page, specify the name of the instance: AcumaticaCLT.

3. On the Confirmation of Configuration page, click **Save Configuration** to save the configuration data.

By default, the name of the configuration file is `InstallConfig.xml`.

4. Save the `InstallConfig.xml` on your computer.

## Step 2: Deploying an Instance by Using the Command-Line Tool

To deploy an out-of-the-box Acumatica ERP instance with the settings specified in the prepared configuration file, do the following:

1. On the Start menu, run as administrator a command-line utility installed on your computer.
2. In the command line, enter a command to navigate to the folder where the Acumatica ERP Configuration wizard is installed and `ac.exe` is stored.

You can use the `cd [path to ac.exe]` command, where `[path to ac.exe]` is the path to the executed file, which is specified in the following format.

```
cd C:\Program Files (x86)\Acumatica ERP\Data\
```

3. In the command line, enter `ac.exe -f:"path to the configuration file"` to start the execution of the configuration file and the deployment of the instance. `[path to the configuration file]` is the path to the configuration file, which is specified in the following format.

```
ac.exe -f:"C:\Program Folder\InstallConfig.xml"
```

4. Press Enter.
- Wait until the deployment of the *AcumaticaCLT* instance has been completed.
5. Open the Acumatica ERP Configuration wizard.
  6. On the Welcome page of the Acumatica ERP Configuration wizard, click **Perform Application Maintenance**. The Application Maintenance page opens.
  7. In the **Installed Sites** table, make sure that the *AcumaticaCLT* instance is in the list.
  8. Select the *AcumaticaCLT* instance, and click **Launch**.

You can access the instance and enable the features for the first time to make sure that it is an out-of-the-box instance, as you have specified in the settings of the configuration file. (For more information about these tasks, see [Instance Deployment: To Deploy an Out-of-the-Box Instance](#) and [Instance Deployment: To Enable Features and Activate the License](#).)

# Lesson 8: Uninstalling of Acumatica ERP

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In this lesson, you will learn how to delete unnecessary Acumatica ERP application instances and how to uninstall the Acumatica ERP Configuration wizard.

## Uninstalling of Acumatica ERP: General Information

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In Acumatica ERP, you can use the Acumatica ERP Configuration wizard to remove an existing application instance. If you no longer need the Acumatica ERP Configuration wizard (for example, if you need another version of the wizard), you can uninstall it.

This topic provides an overview of the processes of deleting instances and uninstalling the Acumatica ERP Configuration wizard.

### Learning Objectives

In this lesson, you will do the following:

- Learn about the deletion of application instances
- Learn about uninstalling the Acumatica ERP Configuration wizard
- Delete an application instance by using the Acumatica ERP Configuration wizard

### Applicable Scenarios

You may need to learn how to delete an application instance or Acumatica ERP Configuration wizard in scenarios that include the following:

- You are a system administrator who needs to remove an unneeded Acumatica ERP application instance.
- You are a system administrator who needs to uninstall the Acumatica ERP Configuration wizard to install an earlier version of Acumatica ERP.

### Deletion of an Instance

Deleting an Acumatica ERP application instance removes this website from Internet Information Services and cleans up the virtual folder related to the website. The instance's database stays untouched—you can delete it by using the database management tools, if needed. Deletion of an instance also does not delete any customized pages or files.

You can delete an application instance by using the Acumatica ERP Configuration wizard. On the Application Maintenance page of the wizard, you select the Acumatica ERP instance that you want to delete and then click **Delete**. For details, see [Uninstalling of Acumatica ERP: To Delete an Instance](#).

### Uninstalling of the Acumatica ERP Configuration Wizard

You might need to uninstall the Acumatica ERP Configuration wizard if you want to install earlier versions of Acumatica ERP. If you uninstall the current version and then install the needed earlier version, you will be able to deploy application instances with earlier versions. Existing application instances or databases will not be removed or altered; instead, the red circle with a white X instead of the green check mark will be shown for them on the Application Maintenance page of the Acumatica ERP Configuration wizard. For details, see [Instance Maintenance: Possible Update Statuses of an Instance](#).

You can uninstall the Acumatica ERP Configuration wizard on the application server by using the standard Windows procedure. The uninstalling process removes only the applications and tools that have been installed by the

Acumatica ERP installer package. All the instances, databases, and customization projects that exist are kept intact and functional.

The general process of completely uninstalling Acumatica ERP from the application server is the following:

1. For each application instance, unpublish any customization projects.
2. Use the Acumatica ERP Configuration wizard to delete all application instances.
3. On the application server computer, uninstall Acumatica ERP Configuration wizard by using the Apps & features tool in Windows.

The relevant registry data will be removed as well as the program group item.

You can also remove Acumatica ERP in one step, also by using Apps & features. You can do this by selecting Acumatica ERP in the list of application, and then clicking the **Modify** button. In the Change, Repair, or Remove Installation page of the Setup wizard, which opens, you click the **Remove** button.



The above procedures do not affect the following entities:

- Databases created by the application: If you need to delete a database, do so manually by using SQL Server tools.
- Directories on the file system used by the application: If needed, manually delete the empty directories on the file system and the program group items.

## Uninstalling of Acumatica ERP: To Delete an Instance

The following activity will walk you through the process of deleting an Acumatica ERP application instance.

### Story

Suppose that you are the system administrator of your company, and need to delete the existing Acumatica ERP application instance.

### Process Overview

In this activity, you will delete the *AcumaticaTraining* application instance.

### System Preparation

Before you begin deleting the Acumatica ERP application instance, make sure you have completed the [Instance Maintenance: To View the Settings of an Instance](#) prerequisite activity.

### Step: Deleting an Application Instance

To delete the *AcumaticaTraining* application instance, do the following:

1. On the Start menu, click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. In the list of existing application instances, click the row with the *AcumaticaTraining* instance, and click **Delete**.
4. In the confirmation dialog box, click **Yes**.
5. Wait while the instance is deleted, and click **OK**.

The application created under the default site in Internet Information Services (IIS) when Acumatica ERP was installed has been deleted. The Application Maintenance page is refreshed, and *AcumaticaTraining* is no longer on the list, as shown in the following screenshot.

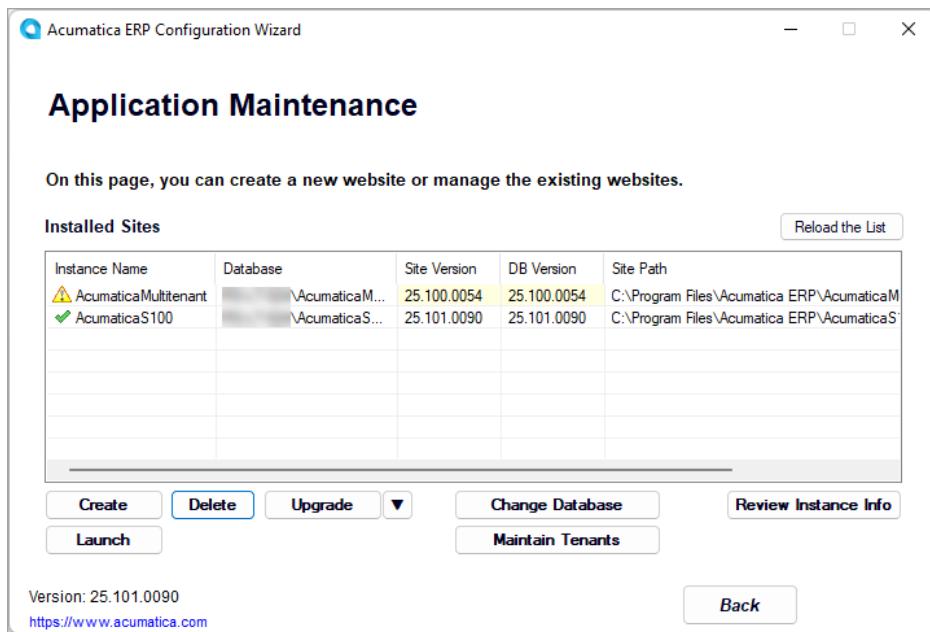


Figure: The updated list of instances