End-User Course

System Administration

Self-Service Portal Administration 2025 R1

Revision: 5/22/2025

Acumatica
The Cloud ERP

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Copyright

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How to Use This Course

This end-user course introduces configuration and maintenance of the Self-Service Portal in Acumatica ERP.

What Is in This Guide

The guide includes the *Company Story* topic and implementation activities. The *Company Story* topic explains the organizational structure of the company preconfigured in the *U100_SSP_Admin_2025 R1* dataset, as well as the company's business processes and requirements. Each implementation activity of the course is dedicated to a particular implementation scenario, and consists of steps that you complete.

Which Training Environment You Should Use

The lessons of the course should be completed on the following instances:

- An instance of Acumatica ERP 2025 R1 GA with the *U100_SSP_Admin_2025 R1* snapshot restored; this snapshot provides the predefined settings and entities you will need as you complete the activities of this course.

  You or your system administrator should first prepare this instance and add a tenant with the *U100_SSP_Admin_2025 R1* dataset, as described in the *How to Create a Tenant with the Needed Data* section below.
- The Self-Service Portal application instance that has been deployed in the same database as the Acumatica ERP application instance.

  You or your system administrator should prepare the Self-Service Portal instance, as described in *Instance Deployment: To Deploy a Self-Service Portal Instance*.

What Is in a Lesson

Each lesson provides a story describing a particular user scenario and an overview of the relevant features that have been enabled in the system; 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 and the Self-Service Portal.

> 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

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, you can click the **Open Help** button in the top pane of the Acumatica ERP screen to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related information and activities and to open a reference topic with detailed descriptions of the form elements.

How to Create a Tenant with the Needed Data

Before you complete this course, you need to add a tenant with the *U100_SSP_Admin_2025 R1* dataset to an existing Acumatica ERP instance. You will then prepare the tenant for completing the activities.

These instructions describe the process of creating a new tenant in the Acumatica ERP instance with a predefined dataset (for example, *U100*). There may be differences in the process if you are creating a new tenant in the Acumatica ERP instance and deploying it without a predefined dataset.

To complete this preparation, perform the following instructions:

1. In Open University (*https://openuni.acumatica.com/courses/*), download the *U100_SSP_Admin_2025 R1* dataset from the files for training.
2. Launch the Acumatica ERP instance and sign in to the system as system administrator by using the *admin* username and the *setup* password.
3. Change the *setup* password to *123*.

    The password you are entering is for training purposes only. In a production environment, you would create a complex password.

4. Open the *Tenants* (SM203520) form, and click **Add New Record** on the form toolbar.
5. In the **Tenant Name** box, type the name to be used on forms that show the site map tree.
6. In the **Login Name** box, type the name to be used for the tenant. The name to be displayed in the info area (in a multitenant system) and on the Sign-In page.
7. On the form toolbar, click **Save**. The system creates the tenant and signs out of the current tenant.
8. Sign out from the system and on the Sign-In page, sign in to the tenant you have just created by using the *admin* username and the *123* password.
9. 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.

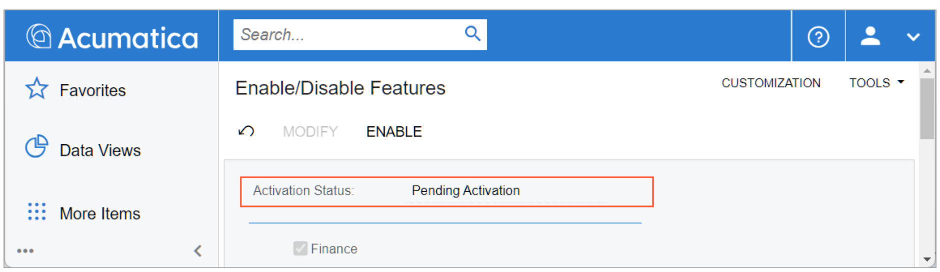
    

    Figure: Activation status of the selected features

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

    The activation status of the currently selected feature set is now *Validated*.

11. In Acumatica ERP, on the **Snapshots** tab of the *Tenants* form, click **Import Snapshot**.
12. In the **Upload Snapshot Package** dialog box, select the *U100_SSP_Admin_2025 R1* file, which you have downloaded, and click **Upload**.

    The system uploads the snapshot and lists it on the **Snapshots** tab of the *Tenants* form.

13. On the form toolbar, click **Restore Snapshot**.
14. In the **Restore Snapshot** dialog box, click **Open** to activate the maintenance mode.

    For more information, see *Platform: Other Improvements*.

15. On the **Apply Updates** (SM203510) form, which opens, click **Schedule Lockout**.
16. In the **Schedule Lockout** dialog box, specify the date, time, and reason of the lockout and click **OK**.

17. On the *Tenants* form, make sure the new tenant is selected in the **Tenant ID** box. On the **Snapshots** tab, click the line with the snapshot you have imported and then click **Restore Snapshot** on the form toolbar.
18. If the **Warning** dialog box appears, click **Yes**.
19. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded, and click **OK**. The system will restore the snapshot.
20. On the **Apply Updates** (SM203510) form, click **Stop Lockout**.
21. Sign out from the system and on the Sign-In page, sign in to the tenant you have just created.

Which Credentials You Should Use

To complete the lessons, sign in as the following users:

1. Lesson 1: *gibbs*
2. Lesson 2: *gibbs*, *tonya@storehut.example.com*, and *ray.newman@storehut.example.com*
3. Lesson 3: *gibbs* and *tonya@storehut.example.com*
4. Lesson 4: *gibbs* and *ray.newman@storehut.example.com*
5. Lesson 5: *gibbs*, *ray.newman@storehut.example.com*, and *tonya@storehut.example.com*

The password for each user is *123*.

Which License You Should Use

For the educational purposes of this course, you use Acumatica ERP under the trial license, which does not require activation and provides all available 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 licensing policy for details.

Company Story

This topic explains the organizational structure and operational activity of the company you will work with 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. Because the company has grown, the equipment center has begun its operations in *01-2025*.

In *01-2025*, the company management decided to set up the Self-Service Portal to provide SweetLife customers with access to the products and services that the company sells and to give customers the ability to submit and track support cases.

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: Configuring the Self-Service Portal

This lesson explains how you can obtain and activate the license for using the Acumatica Self-Service Portal, and how you can specify the general settings for the Self-Service Portal.

Configuring the Self-Service Portal: General Information

The Acumatica Self-Service Portal provides tools that you can use to configure and maintain your Self-Service Portal instance.

Learning Objectives

In this lesson, you will do the following:

- Activate the license of the Self-Service Portal
- Delete the license of the Self-Service Portal
- Specify the general settings of the Self-Service Portal

Applicable Scenarios

You may need to configure the Self-Service Portal in the following cases:

- You want to create a special site for your customers for better communication and to work with them.
- You want each customer to have access to the customer's own documents, such as sales orders, invoices, credit memos, and statements.

Administration of the Self-Service Portal

By using the system management tools of the Self-Service Portal, you can activate the license of your Self-Service Portal instance, specify the default settings, configure access to the functionality, set up single sign-on (SSO) with the supported identity providers, and customize your Self-Service Portal instance.

To access the system management functionality of the Self-Service Portal, you must sign in to your Self-Service Portal instance with a user account to which the *Administrator* or *Portal Admin* role is assigned.

Roles for Self-Service Portal Management

In Acumatica ERP, you configure all access by using roles. For your company's internal users to perform configuration and management tasks in the Self-Service Portal, these users must have sufficient access rights to the Self-Service Portal. Generally, the users who work with the Self-Service Portal need access rights to do the following:

- Configure and manage the Self-Service Portal instance: You assign these users the *Portal Admin* role, which has been specifically designed for those users who will configure and manage the Self-Service Portal.
- Initially configure the Self-Service Portal instance: You can assign these users the *Administrator* role, which gives these users full access to all system objects.

  > We recommend that you assign this role to users only during the initial Self-Service Portal setup. After the setup, you should assign the role to users only in extraordinary cases.

For more information on Acumatica ERP roles, see *Managing User Access*.

Licensing of the Self-Service Portal

The Acumatica Self-Service Portal is a separate application instance that requires licensing. The Self-Service Portal instance and the standard Acumatica ERP instance use different types of licenses.

By default, the Self-Service Portal is installed in trial mode, which means that only two users may concurrently use the system. Each time a third user signs in to the Self-Service Portal, one of the current users is forcibly signed out.

You use the *Activate License* (SM201510) form to enter a product key or upload a license file and then activate the system. When you obtain and activate the license for using the Self-Service Portal, the trial mode restrictions are removed.

External Identity Provider for the Self-Service Portal

The Acumatica Self-Service Portal supports single sign-on (SSO) with external identity providers. With SSO enabled, any user of the Self-Service Portal who specified their account with the identity provider for their user account in the Self-Service Portal will be able to sign in with their external account.

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

Configuring the Self-Service Portal: To License the Self-Service Portal Instance

In the following activity, you will learn how to activate a license for the Acumatica Self-Service Portal, as well as how to delete the license.

Story

Suppose that the SweetLife Fruits & Jams company has decided to create a Self-Service Portal instance, which will be used by SweetLife's customers. Acting as system administrator, you need to configure the system before these users can use it.

In this activity, you will perform the first step of this configuration: activating the instance of the Self-Service Portal.

> During production use of the Self-Service Portal, you activate your license and enable the needed features. During testing, however, you work in trial mode, where you can enable and use any feature. Thus, in the second step of this activity, you will delete the license so that you can continue working in trial mode while performing other activities that involve working with the Self-Service Portal.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  > This deployment is outside of the scope of this course.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.

Process Overview

In this activity, you will do the following:

1. Activate your license on the *Activate License* (SM201510) form of the Self-Service Portal.
2. Delete the Self-Service Portal license to return to trial mode for testing purposes.

System Preparation

Before you apply a license key to the Self-Service Portal instance, you should do the following:

1. Make sure that the port 443 is opened on the computer running the Acumatica ERP instance. You may have to open port 443 if the computer has a firewall enabled.
2. Launch the Self-Service Portal instance that uses the same database as Acumatica ERP.
3. Sign in to a company with the *U100_SSP_Admin_2025 R1* dataset preloaded as system administrator by using the *gibbs* username and the *123* password.

Step 1: Activating the Self-Service Portal License

To activate the Self-Service Portal license, do the following:

1. In the Self-Service Portal, open the *Activate License* (SM201510) form.
2. On the form toolbar, click **Enter License Key**.
3. In the **Activate New License** dialog box, which opens, enter the `918B-A728-0569-7FC6-D058` license key and click **OK**.

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

   > The license key used in this activity is for training purposes only. It includes a limited number of features. 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.

4. In the **Agree to Proceed** dialog box, which opens, click the link to read the software license agreement. If you agree to the terms of the agreement, click **Agree** to proceed with activation. The dialog box is closed.
5. In the Summary area, review the license's status (*Valid*), its validity period, and the number of users and tenants.
6. On the form toolbar, click **Apply License** to activate your license.

   The system restarts the instance. In the table, notice the list of the features activated by the license.

Step 2: Deleting the Self-Service Portal License

In this step, to restore trial mode for testing purposes, you will delete the Self-Service Portal license. (These actions would not be performed in production use of the portal.) Do the following:

1. While you are still viewing the *Activate License* (SM201510) form, on the form toolbar, click **Delete License**.
2. In the **License** dialog box, which opens, click **OK**. Wait for the system to complete the operation.

   The system restarts the instance. Notice that now the instance is in trial mode again.

Configuring the Self-Service Portal: To Specify the General Settings of the Self-Service Portal

In the following implementation activity, you will specify the general settings of the Acumatica Self-Service Portal instance.

Story

Suppose that SweetLife Fruits & Jams has decided to create a Self-Service Portal instance, which will be used by SweetLife customers. Acting as system administrator, you need to configure the system before these users can use it. You also need to specify the general settings for the Self-Service Portal.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  > This deployment is outside of the scope of this course.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.

Process Overview

In this activity, you will specify the general settings of the Self-Service Portal instance on the Portal Preferences (SP800000) form.

System Preparation

Before you start specifying the general settings of the Self-Service Portal, do the following:

1. Launch the Acumatica ERP instance that uses the same database and tenant as the Self-Service Portal instance to be configured.
2. Sign in to a company with the *U100_SSP_Admin_2025 R1* dataset preloaded as system administrator by using the *gibbs* username and the *123* password.
3. On the *Enable/Disable Features* (CS100000) form, enable the *Customer Portal* feature.

Step: Specifying the General Settings of the Self-Service Portal

To specify the general settings of the Self-Service Portal, perform the following instructions:

1. Sign in to a Self-Service Portal as system administrator by using the *gibbs* username and the *123* password.
2. Open the Portal Preferences (SP800000) form.
3. On the **General Settings** tab (**Portal Settings** section), do the following:
   a. In the **Portal Name** box, type the portal name, such as `SweetLife Online Shop`.

b. To restrict the visibility of financial documents, in the **Display Financial Documents** box, select *From Company*. With this option selected, the Self-Service Portal users will see the financial documents associated with a particular company (tenant) and its branches.

> The **Display Financial Documents** box may be unavailable for editing, which depends on your Acumatica ERP license. If the box is unavailable for editing, make sure that you have deleted the license that you activated in the Self-Service Portal (see *Configuring the Self-Service Portal: To License the Self-Service Portal Instance*).

c. In the **Portal Site Company** box, which appears, select *SWEETLIFE*.

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

You have specified the general settings of the Self-Service Portal instance.

Lesson 2: Managing Access to the Self-Service Portal

This lesson explains how to create user roles and types that give users access to the Acumatica Self-Service Portal instance. You will learn how to create user accounts and assign these user roles to users.

Managing Access to the Self-Service Portal: General Information

The Acumatica Self-Service Portal is a site designed to give the users of your customers' organizations limited access to your Acumatica ERP instance.

To control access to the Self-Service Portal, you assign these users *roles*: sets of access rights designed for users with similar responsibilities. These roles are assigned access rights to the appropriate system objects and functionality, so users can access only the information they need.

To ease the process of setting up roles, Acumatica ERP provides a set of predefined roles; you can make changes to any existing role, create your own role from the ground up (which we do not recommend), or copy an existing role and make changes to the copy. To give contacts in the customer's company the ability to access the Self-Service Portal instance, you can assign the predefined *Portal User* role (or a similar role that you create) to these contacts. When you create a user account associated with a contact, you assign the needed role to this user.

Also, by applying the default *Portal User* access rights, you can give administrative users in the customer's organization the access rights to add, delete, and manage user accounts for the contacts of their organization.

Learning Objectives

In this lesson, you will do the following:

- Create user roles for the Self-Service Portal users
- Create user types for the Self-Service Portal users
- Create user accounts for contacts

Applicable Scenarios

You may need to create user roles, user types, and user accounts for the Self-Service Portal in the following cases:

- You want to give access to the Self-Service Portal to your customers' employees.
- You want users of your customers to be able to create contact and user accounts in the Self-Service Portal, on their own.

Portal User Role

Acumatica ERP provides a predefined role, *Portal User*, designed to be assigned to users that may have access to the Self-Service Portal. A user with this role assigned can sign in to the Self-Service Portal and review the information pertaining to the business account associated with the user account, including the following:

- View and edit the company's contact information and address.
- Add, delete, and manage the contacts within the organization.
- View the contracts in the organization.
- View and print customer's documents, such as sales orders, shipments, statements, invoices, or credit memos.

If you use the predefined *Portal User* role, you can change the default role settings by using the *Access Rights by Role* (SM201025) form of the Acumatica ERP instance or the Self-Service Portal. You can also create your own role for portal users by copying the *Portal User* role and modifying the access rights in the new role.

For more information about creating a role for portal users, see *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*.

External User Types

In Acumatica ERP, *user types* provide default settings for new users that you create, including which entity type (an internal employee or an external contact) is associated with the user type and which roles can be associated with the user accounts to which the user type is assigned.

On the *User Types* (EP202500) form, each user type for portal users must have the *contact* entity type selected in the **Linked Entity** box of the Summary area and the *Portal User* role (or any other custom portal role that you might have created for portal users) listed on the **Allowed Roles** tab.

For more information, see *User Access: Linked Entities and User Types*.

User Accounts for Contacts

You can add a user account to a contact account in one of the following ways:

- By using the *Contacts* (CR302000) form to open the contact for editing, and then adding the user account information on the **User Info** tab.
- By using the *Users* (SM201010) form to create a user account and linking it with the existing contact account.

When you create a user account, you must select a contact-related user type and assign the user the *Portal User* role, or any other role created for the portal user. For details, see *Managing Access to the Self-Service Portal: To Create User Accounts for Contacts*.

Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees

Acumatica ERP provides the predefined *Portal User* role, which allows users to view and work with the company profile and company documents, including contracts and financial documents. A user with this role can create, modify, or delete contacts associated with the company. These are powerful access rights that you might want to avoid assigning to everyone in a customer's company. You can create another role with restricted access to contact creation.

In the following implementation activity, you will create two roles for the Self-Service Portal (*Customer Admin* and *Customer User*); both roles are based on copies of the existing *Portal User* role.

Story

Suppose that your company wants to have different access rights for users of the Self-Service Portal. You need to create two user roles for the Self-Service Portal users: one for administrators of the customer (*Customer Admin*), and another for users of the customer (*Customer User*).

Acting as system administrator, you need to create user roles based on a copy of the existing *Portal User* role and specify the proper access rights to some of the forms.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.

Process Overview

In this activity, you will copy an existing role on the *Access Rights by Role* (SM201025) form to create new roles. For one of the new roles, on the same form, you will modify the access rights to forms and specific records in the system.

System Preparation

Before you start creating user roles, sign in to the Self-Service Portal instance with the *U100_SSP_Admin_2025 R1* dataset preloaded as system administrator by using the *gibbs* username and the *123* password.

Step 1: Creating Roles by Copying an Existing Role

To create the needed new roles by copying the existing *Portal User* role, do the following:

1. In the Self-Service Portal, open the *Access Rights by Role* (SM201025) form.
2. In the **Role Name** box of the Summary area, select *Portal User*.
3. On the form toolbar, click **Copy Role**.
4. In the **New Role Name** box of the **New Role** dialog box, which opens, type `Customer Admin` and click **Copy**.

   The system closes the dialog box, creates a new role on the *Access Rights by Role* form (to which you return), and populates the new role with the settings of the role you have copied (except for the role name, for which the system inserts the new role name that you entered in the dialog box).
5. On the form toolbar, click **Save**.
6. On the form toolbar, click **Copy Role**.
7. In the **New Role Name** box of the **New Role** dialog box, which opens, type `Customer User` and click **Copy**. The system closes the dialog box, creates a new role on the *Access Rights by Role* form (to which you return), and populates the new role with the settings of the role you have copied (except for the role name).
8. On the form toolbar, click **Save**.

In the following step, you will change this role's access to some of the forms to give the role fewer privileges.

Step 2: Defining the Proper Access Rights for the Customer User Role

In this step, you will make changes to the *Customer User* role, which you have created. While you are still viewing the *Customer User* role on the *Access Rights by Role* (SM201025) form, do the following:

1. In the left pane, click the **Administration** node (below the tenant node). The right pane displays the list of the forms available in the **Administration** workspace with the level of access rights the role has to each form.
2. In the right pane, in the row with *Portal Preferences* in the **Description** column, select *Revoked* in the **Access Rights** column.

3. On the form toolbar, click **Save**.
4. In the left pane, select **Profile**.
5. In the right pane, in the row with *Company Profile* in the **Description** column, select *View Only* in the **Access Rights** column.
6. In the row with *Contacts* in the **Description** column, select *Revoked* in the **Access Rights** column.
7. On the form toolbar, click **Save**.

You have created two user roles by copying an existing role. You have also changed the access rights of one of the new roles to some Self-Service Portal forms.

Managing Access to the Self-Service Portal: To Create User Types for User Accounts

In the following implementation activity, you will create user types to be used for contacts that will have access to the Acumatica Self-Service Portal. When a user type is specified for a newly created user, it causes the system to insert default settings, including the entity type (an external contact for a Self-Service Portal user) associated with the user type and the roles that can be associated with the user account.

Story

Suppose that SweetLife Fruits & Jams wants to give access to the Self-Service Portal for users of customers' companies. To start configuring the access, you need to create specific user types first. You will need to create the *Customer Admin* and *Customer User* user types, which you will use for the *Customer Admin* and *Customer User* user roles, respectively.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  > This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.

Process Overview

In this activity, you will do the following on the *User Types* (EP202500) form of Acumatica ERP:

1. Create the *Customer User* and the *Customer Admin* user types.
2. Select the role that can be assigned to the newly created user accounts with the selected user type and make it default role.

System Preparation

Before you start creating user types, do the following:

1. Launch the Acumatica ERP instance that uses the same database and tenant as the Self-Service Portal to be configured.
2. Sign in as system administrator by using the *gibbs* username and the *123* password.
3. Make sure that you have performed the following prerequisite activity: *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*.

Step 1: Creating a User Type for Customers' Users

In this step, you will create the *Customer User* user type, which will be selected for the Self-Service Portal users in the customers' companies who are not being given administrative access rights.

To add the *Customer User* user type, do the following in the Acumatica ERP instance:

1. In Acumatica ERP, open the *User Types* (EP202500) form.
2. In the **User Type** box of the Summary area, type `Customer User`.
3. In the **Linked Entity** box, select *Contact*. This setting indicates that *Customer User* is a contact-related user type: a user type associated with a contact in your system.
4. In the **Description** box, type `Customer user`.
5. Select the **Allow This Type for Contacts** check box.
6. On the **Allowed Roles** tab, click **Add Row**.
7. Specify the following settings for this row:
   - **Role Name**: *Customer User*
   - **Assigned by Default**: Selected

     With this check box selected, this role will be automatically assigned to any new user for which the user type is selected.
8. On the **Login Rules** tab, select the **Use Email as Username** check box. This indicates that the email address of a contact will be used as the username of the contact for a new user of this user type.
9. On the form toolbar, click **Save**.

Step 2: Creating a User Type for Customers' Administrators

In this step, you will add a special user type because none of the existing types allows a user to manage user accounts in the Self-Service Portal. To add the *Customer Admin* user type, do the following:

1. While you are still viewing the *User Types* (EP202500) form, click **Add New Record** on the form toolbar.
2. In the **User Type** box of the Summary area, type `Customer Admin`.
3. In the **Linked Entity** box, select *Contact*. This setting indicates that *Customer Admin* is a contact-related user type: a user type associated with a contact in your system.
4. In the **Description** box, type `Customer admin`.
5. Select the **Allow This Type for Contacts** check box.
6. On the **Allowed Roles** tab, click **Add Row**.
7. Specify the following settings for this row:
   - **Role Name**: *Customer Admin*
   - **Assigned by Default**: Selected
8. On the **Login Rules** tab, select the **Use Email as Username** check box.
9. On the **Managed User Types** tab, do the following:

   a. Click **Add Row**.

b. In the **User Type** column, select *Unrestricted External User*.

c. Click **Add Row**.

d. In the **User Type** column, select *Customer User*.

With these types listed on the tab, a user with the *Customer Admin* user type can create, manage, and delete user accounts that are associated with the user types listed on this tab.

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

You have created user types, which will be then assigned to the Self-Service Portal users.

Managing Access to the Self-Service Portal: To Create User Accounts for Contacts

In the following implementation activity, you will create user accounts by using the *Users* (SM201010) and *Contacts* (CR302000) forms of Acumatica ERP.

Story

Suppose that your company has decided to provide the Self-Service Portal for users of customers' companies. As system administrator, you have already created user roles and user types. Now you need to create two user accounts in the Self-Service Portal for the following customer contacts of Storehut (a chain of supermarkets):

- A customer administrator (Tonya Lawrence, a buyer) who will have the access rights to manage other user accounts of this customer in the Self-Service Portal and update company's profile. The *Tonya Lawrence* contact has already been created on the *Contacts* (CR302000) form of Acumatica ERP, and you need to create a corresponding user account.
- A customer user (Ray Newman, an assistant buyer) who will have restricted access to company profile modification and company contacts. No contact or user account exists for Ray Newman in Acumatica ERP, and you will create both a contact and a user account.

You will then verify that the created users have the proper access rights in the Self-Service Portal.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.
- In Acumatica ERP, the *STORE* contact class—for the employees of supermarkets and other stores—has been defined on the *Contact Classes* (CR205000) form.

  For the case classes that should be available for selection to customer contacts in the Self-Service Portal, the **Internal** check box in the Summary area of the *Contact Classes* (CR205000) form should be cleared.

- In Acumatica ERP, the *Tonya Lawrence* contact has been created on the *Contacts* (CR302000) form and associated with the *STOREHUT* business account, which has been created on the *Business Accounts* (CR303000) form and extended to be a customer.

Process Overview

For the two Storehut employees to whom you want to give access to the Self-Service Portal, you will create user accounts.

For Ray Newman, who does not have a related contact in Acumatica ERP, you will first create a contact on the *Contacts* (CR302000) form. You will then specify the settings to cause the system to create Ray's user account.

For Tonya Lawrence, a contact already exists in Acumatica ERP, and you will use the *Users* (SM201010) form to create Tonya's user account.

System Preparation

Before you start creating user accounts for the Self-Service Portal, do the following:

1. Make sure that you have performed the following prerequisite activities:
   a. *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*
   b. *Managing Access to the Self-Service Portal: To Create User Types for User Accounts*
2. Launch the Acumatica ERP instance that uses the same database and tenant as the Self-Service Portal to be configured.
3. Sign in as system administrator by using the *gibbs* username and the *123* password.

Step 1: Creating a User Account for a Contact

To create a user account for Tonya Lawrence, who already has a contact defined in the system, do the following:

1. In Acumatica ERP, open the *Users* (SM201010) form.
2. In the **Login** box of the Summary area, type `tonya@storehut.example.com`, which will be used as the username of the new user account.
3. Clear the **Generate Password** check box.
4. In the **Password** box, type `1234`.
5. In the **User Type** box, select the *Customer Admin* user type. For this user type, *Contact* is selected in the **Linked Entity** box on the *User Types* (EP202500) form, making *Customer User* a contact-related user type: a user type associated with a contact in your system.

   The system displays a warning dialog box asking you to verify that you want to proceed.
6. In the warning dialog box, click **Yes**. You are proceeding because this temporary issue will be resolved when you select a linked entity.
7. In the **Linked Entity** box, select `Tonya Lawrence`.

   The system automatically populates the appropriate elements on the form with the contact's name and email address.
8. To select the security policies to be applied to the user account according to your company's policy, specify the following settings:
   - **Allow Password Recovery**: Selected
   - **Allow Password Changes**: Selected
   - **Password Never Expires**: Cleared
   - **Force User to Change Password on Next Login**: Selected

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

The system has created the user account for the *Tonya Lawrence* contact on the *Users* form.

Step 2: Creating a Contact and a User Account for This Contact

To create a contact, *Ray Newman*, for the *STOREHUT* customer and create a user account of the *Customer User* type for this contact, do the following:

1. On the *Contacts* (CR302000) form, add a new record.
2. In the **Business Account** box of the Summary area, select *STOREHUT*.
3. On the **Details** tab, do the following:
   a. In the **First Name** box of the **Contact** section, type `Ray`.
   b. In the **Last Name** box, type `Newman`.
   c. In the **Job Title** box, type `Assistant buyer`.
   d. In the **Email** box, type `ray.newman@storehut.example.com`.
   e. In the **Address** section, clear the **Override** check box. Based on the address information specified in the *STOREHUT* business account, the system fills in the address boxes with the company's address information.
4. On the **CRM Info** tab, in the **Contact Class** box, select *STORE*.
5. On the form toolbar, click **Save**.
6. On the **User Info** tab, do the following:
   a. In the **User Type** box, select *Customer User*.
   b. In the **Login** box, make sure that the *ray.newman@storehut.example.com* email address is inserted.
   c. Clear the **Generate Password** check box. You will instead enter a password for this user.
   d. In the **Password** box, type `123`.
7. On the form toolbar, click **Save**.

> In a production environment, if the system email account is configured in the Acumatica ERP instance, when you have added the user account for a contact and saved your changes, an email containing the username and password would be sent to the user's email account.

Step 3: Reviewing the Customer Administrator's Access to the Self-Service Portal

To verify that the customer administrator user account you created has access rights to create contacts and edit company profile information in the Self-Service Portal, do the following:

1. Sign in to the Self-Service Portal instance as the customer administrator you have defined by using the *tonya@storehut.example.com* username and the *1234* password.

   The system immediately displays boxes for the new password because the **Force User to Change Password on Next Login** check box was selected on the *Users* (SM201010) form when you created the user account for this user.
2. In the New Password and Confirm Password boxes, type `123`; click **Sign In**.
3. Open the Company Profile (SP408030) form.
4. Verify that you can edit company information by copying the phone number in the **Phone 1** box and inserting it in the **Fax** box.
5. On the form toolbar, click **Save**.

6. Open the Contacts (SP408040) form.
7. Verify that the **Add New** button is available on the form toolbar.

> The user account of a customer administrator that you have created in this activity can create user accounts for contacts to access the Self-Service Portal instance for the specific customer. The customer administrator creates contacts directly in the Self-Service Portal. This process of creating contacts, which is similar to this process in the Acumatica ERP instance, is outside of the scope of this training.

8. Sign out of the Self-Service Portal.

Step 4: Reviewing the Customer User's Access to the Self-Service Portal

To verify that the customer user that you created can sign in to the Self-Service Portal and does not have access to modify the company's information, do the following:

1. Sign in to the Self-Service Portal instance by using the *ray.newman@storehut.example.com* username and the *123* password.
2. Open the Company Profile (SP408030) form. Make sure that the data on the form is unavailable for editing.
3. Search for the Contacts (SP408040) form, and make sure that the form does not appear in the search results, indicating that it is not accessible.
4. Sign out of the Self-Service Portal.

In Acumatica ERP, you have created two user accounts by using the *Users* (SM201010) and *Contacts* (CR302000) forms. For these user accounts, you have specified different user types, which caused different user roles to be assigned to them. Because of these differences, the created users have different levels of access rights to the same forms in the Self-Service Portal instance.

Lesson 3: Managing the Inventory Catalog in the Self-Service Portal

This lesson explains how you can configure order management in the Acumatica Self-Service Portal and create an inventory catalog to be used by customers in the Self-Service Portal.

Managing the Inventory Catalog in the Self-Service Portal: General Information

With the inventory catalog functionality in the Acumatica Self-Service Portal, you provide your customers with access to the products and services that your company sells. You use your Acumatica ERP instance to create the catalog and manage the product and service descriptions and images. In the Self-Service Portal, your customers can then add the products and services in the catalog to the cart and create orders.

Learning Objectives

In this lesson, you will do the following:

- Develop an understanding of the tasks that must be performed for the configuration of the inventory catalog
- Configure order management in the Self-Service Portal
- Update descriptions and images for inventory items included in the catalog
- Create sales categories for the inventory catalog
- Manage sales categories for inventory items
- View the inventory items in the catalog and add an item to the cart in the Self-Service Portal

Applicable Scenarios

You may need to configure order management and the inventory catalog in the Self-Service Portal in the following cases:

- You want to provide your customers with online and up-to-date access to the catalog of products or services that your company sells.
- You want to receive orders that customers create in the Self-Service Portal.

Workflow of the Configuration of the Inventory Catalog in the Self-Service Portal

To prepare the system for customers to use the inventory catalog and place orders in the Self-Service Portal, you perform the following general steps:

1. You perform the initial configuration of the Self-Service Portal. For details, see *Configuring the Self-Service Portal: General Information*.
2. You set up access for users to the Self-Service Portal. For details, see *Managing Access to the Self-Service Portal: General Information*.
3. In Acumatica ERP, on the *Enable/Disable Features* (CS100000) form, you enable the following features:
   - *Customer Portal*
   - *B2B Ordering*
   - *Financials on Portal*

4. In Acumatica ERP, on the *Contact Classes* (CR206000) form, you make sure that the needed contact classes have been created.

   For the contact classes that should be available for selection to users in the Self-Service Portal, the **Internal** check box in the Summary area of the form must be cleared.

5. In Acumatica ERP, on the *Business Account Classes* (CR208000) form, you make sure that the needed business account classes have been created.

   For the business account classes that should be available for selection to customer administrators in the Self-Service Portal, the **Internal** check box in the Summary area of the form must be cleared.

6. In Acumatica ERP, you configure order management with inventory, as described in *Order Management with Inventory*.
7. In the Self-Service Portal, on the **B2B Ordering Settings** tab of the Portal Preferences (SP800000) form, you specify the settings for order management, as illustrated in *Managing the Inventory Catalog in the Self-Service Portal: Implementation Activity*.
8. In the Self-Service Portal, you create a catalog of products and services that will be available for ordering to the customers by adding items for sale to the catalog, as described in the following sections and as illustrated in *Managing the Inventory Catalog in the Self-Service Portal: Implementation Activity*.

Sales Categories of Inventory Items

On the *Item Sales Categories* (IN204060) form of Acumatica ERP, a user with *Administrator* rights can create a hierarchical structure of sales categories that will be available for selection to the users on the Catalog (SP700000) form in the Self-Service Portal.

In the **Category** box of this form, a portal user can click the magnifier button to view the catalog structure, select a sales category, and view inventory items in the selected sales category.

Creation of the Catalog of Products and Services in the Self-Service Portal

With order management in the Self-Service Portal, you can add items for sale (which have been created in Acumatica ERP) to the catalog in the Self-Service Portal. These items for sale are inventory items.

You can add to the catalog both stock items created on the *Stock Items* (IN202500) form and non-stock items created on the *Non-Stock Items* (IN202000) form.

In Acumatica ERP, on the *Item Sales Categories* (IN204060) form, a user with *Administrator* rights can create sales categories for inventory items and use these categories to classify the products and services that your company sells. (For example, categories could use such phrases as *T-Shirts*, *Spare Car Parts*, *Laptops*, *Repair of Washing Machines*, or *Webinars*.)

Then in the Self-Service Portal, you add to the categories items for sale, which will be available in the catalog on the Catalog (SP700000) form.

Inventory items that do not have a sales category are not displayed in the catalog on the Catalog (SP700000) form in the Self-Service Portal and are unavailable for selection to the portal users.

For more details on managing inventory items, see *Inventory Management*.

Descriptions and Images of Inventory Items

In Acumatica ERP, all inventory items include settings: identifier, description, image, price, cost, unit of measure (UOM), default warehouse, and default vendor information. On the Catalog (SP700000) form, a portal user can view the quantity, description, price, discount, and warehouse for each item. The user can click an item and in the **Item Details** dialog box, which opens, view additional item settings, such as the image and any attributes of the inventory item.

Managing the Inventory Catalog in the Self-Service Portal: Implementation Activity

In the following implementation activity, you will set up the Acumatica Self-Service Portal for your customers to order online. You will also learn how to manage your online catalog in Acumatica ERP.

Story

Suppose that you are Kimberly Gibbs, system administrator at the SweetLife Fruits & Jams company. You need to configure the Self-Service Portal to provide your customers with access to the products that SweetLife sells.

In your Acumatica ERP instance, you need to create new sales categories, add new items to these categories, which gives customers the ability to order these items in the Self-Service Portal.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  > This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.
- On the *Item Classes* (IN201000) form, the *FOOD* and *JCRCFGPRT* (parts of configurable juicers) item classes have been defined.
- On the *Item Sales Categories* (IN204060) form, a few sales categories have been created, including the *Certificates* category.
- On the *Stock Items* (IN202500) form, the inventory items of the *FOOD* and *JCRCFGPRT* (parts of configurable juicers) item classes have been created.

Process Overview

In this activity, you will do the following:

1. Sign in to Acumatica ERP. In Acumatica ERP, on the *Enable/Disable Features* (CS100000) form, you will enable the features needed for order management and inventory catalog.
2. In the Self-Service Portal, on the Portal Preferences (SP800000) form, specify the settings for order management and the inventory catalog.
3. In Acumatica ERP, do the following:
   a. On the *Stock Items* (IN202500) form, you will add a description and an image to an inventory item.

   b. On the *Item Sales Categories* (IN204060) form, you will create and manage sales categories for inventory items, add items to sales categories, and remove an item from a sales category.

4. Sign in to the Self-Service Portal. On the Catalog (SP700000) form, you will verify that the catalog contains the newly added items. Then you will verify that inventory catalog in the Self-Service Portal has been correctly configured.

System Preparation

Before you start configuring the order management and inventory catalog in the Self-Service Portal, do the following:

1. Launch the Acumatica ERP instance with the *U100_SSP_Admin_2025 R1* dataset preloaded.
2. Sign in as system administrator Kimberly Gibbs by using the *gibbs* username and the *123* password.
3. In Acumatica ERP, make sure that on the *Business Accounts* (CR303000) form, for the *STOREHUT* business account, *STORE* is selected in the **Business Account Class** box.
4. Make sure that you have performed the following prerequisite activities:
   a. *Configuring the Self-Service Portal: To License the Self-Service Portal Instance*
   b. *Configuring the Self-Service Portal: To Specify the General Settings of the Self-Service Portal*
   c. *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*
   d. *Managing Access to the Self-Service Portal: To Create User Types for User Accounts*
   e. *Managing Access to the Self-Service Portal: To Create User Accounts for Contacts*
5. Download the *red_delicious.jpg* and *sweetlife.jpg* files.

> To be sure that the needed workspaces, forms, reports, and dashboards will be available in the Self-Service Portal, before completing the activity, add the following key to the appSettings section of the `web.config` file located in the folders of the Acumatica ERP and Self-Service Portal websites.
>
> ```
> <add key="IsMultiSiteMode" value="true" />
> ```
>
> You should also reload the webpages of the Acumatica ERP instance and the Self-Service Portal. Synchronization of the Acumatica ERP and Self-Service Portal instances may take some time.

Step 1: Enabling the Needed Features

To enable the features needed for order management and inventory catalog, in Acumatica ERP, do the following:

1. Open the *Enable/Disable Features* (CS100000) form.
2. On the form toolbar, click **Modify**.
3. Under the *Customer Portal* group of features, select the following check boxes:
   - **B2B Ordering**
   - **Financials on Portal**
4. On the form toolbar, click **Enable** to enable the features.

Step 2: Specifying the Settings for Order Management in the Self-Service Portal

To specify the settings for online order management in the Self-Service Portal, do the following:

1. Launch the Self-Service Portal instance that uses the same database as the Acumatica ERP instance. You should sign in as system administrator by using the *gibbs* username and the *123* password.

2. Open the Portal Preferences (SP800000) form.
3. In the **General Settings** section of the **B2B Ordering Settings** tab, do the following:
   a. In the **Default Branch for New Orders** box, select *HEADOFFICE*.
   b. In the **Sales Order Type** box, make sure that *SO* is selected.

      This value determines the type of a sales order to be generated when a customer creates a sales order in the Self-Service Portal.
4. In the table, in the **Include in Warehouses List** column, select the check box in the row that has *WHOLESALE* in the **Warehouse ID** column.
5. On the form toolbar, click **Save**.
6. In the **General Settings** section, do the following:
   a. In the **Default Stock Item Warehouse** box, select *WHOLESALE*, which is the warehouse to be used by default for ordering stock items.
   b. In the **Default Non-Stock Item Warehouse** box, select *WHOLESALE*. This warehouse will be used by default for ordering non-stock items.
   c. Clear the **Show Available Quantities** check box. This setting causes the quantities of items available in the warehouses to be displayed in the catalog on the Catalog (SP700000) form. You do not need the customers to see these quantities.
   d. Make sure that the **Allow Only Sales Unit for Purchase** check box is selected. With this setting, items can be added to the purchase orders in only the unit of measure (UOM) that has been specified as the sales unit in the item's settings on the *Stock Items* (IN202500) or *Non-Stock Items* (IN202000) form.
7. In the **Default Image Settings** section, upload the image to be used as the default image when an inventory item does not have any images attached. Do the following:
   a. Click **Browse**.
   b. Select the `sweetlife.jpg` file, which you have downloaded while preparing the system.
   c. Click **Upload**.
8. On the form toolbar, click **Save**.
9. Sign out of the Self-Service Portal.

Step 3: Adding the Description and the Image for an Inventory Item

If descriptions and images have been added for the inventory items in Acumatica ERP, customers can view these descriptions and images in the online catalog on the Catalog (SP700000) form of the Self-Service Portal.

To add the description and the image for the *APPLES* inventory item, do the following:

1. In Acumatica ERP, sign in to the system as system administrator by using the *gibbs* username and the *123* password.
2. On the *Stock Items* (IN202500) form, open the *APPLES* record.
3. In the **Description** box, update the description by typing `Fresh Red Delicious apples 1 lb`.
4. Add the image to the stock item by doing the following:
   a. On the **Attributes** tab, right of the **Image** box, click **Browse**.
   b. Select the `red_delicious.jpg` file, which you have downloaded earlier.
   c. Click **Upload** to add the image to the stock item record.

The images that you upload on the **Attributes** tab of the *Stock Items* form are displayed in the **Item Details** dialog box in the online catalog on the Catalog (SP700000) form of the Self-Service Portal, which a user can open by clicking the link in the **Inventory ID** column.

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

Step 4: Creating New Sales Categories and Subcategories for Inventory Items

To add new sales categories and subcategories to be used for inventory items in the catalog, do the following:

1. While you are still signed in to Acumatica ERP, open the *Item Sales Categories* (IN204060) form.
2. Create the *Fruits* sales category as follows:
   a. In the **Categories** pane, click the tenant name.
   b. On the **Categories** pane toolbar, click **Add Category**.
   c. At the top of the right pane, in the **Description** box, type `Fruits` (the name of the new category).
   d. On the form toolbar, click **Save**.
3. Create the *Spares* sales category as follows:
   a. In the **Categories** pane, click the tenant name.
   b. On the **Categories** pane toolbar, click **Add Category**.
   c. At the top of the right pane, in the **Description** box, type `Spares`.
   d. On the form toolbar, click **Save**.
4. Create the subcategories of the *Fruits* category as follows:
   a. In the **Categories** pane, click *Fruits*.
   b. On the pane toolbar, click **Add Category**.
   c. At the top of the right pane, in the **Description** box, type `Exotic Fruits`.
   d. On the form toolbar, click **Save**.
   e. In the **Categories** pane, click *Fruits*.
   f. On the pane toolbar, click **Add Category**.
   g. At the top of the right pane, in the **Description** box, type `Seasonal Fruits`.
   h. On the form toolbar, click **Save**.

Step 5: Renaming a Sales Category

You can rename sales categories for inventory items by changing their descriptions.

While you are still viewing the *Item Sales Categories* (IN204060) form, to rename the *Spares* category (which you created in the previous step), do the following:

1. In the **Categories** pane, click the *Spares* category.
2. In the right pane, in the **Description** box, type `Spare Parts`.
3. On the form toolbar, click **Save**.

Step 6: Rearranging Sales Categories

You can rearrange sales categories for inventory items by changing their order in the list of categories. Suppose that you need to place the *Certificates* category to the highest position for better visibility.

To rearrange the categories, do the following:

1. While you are still viewing the *Item Sales Categories* (IN204060) form, in the **Categories** pane, click the *Certificates* category (which has been predefined in the *U100_SSP_Admin_2025 R1* dataset).
2. On the pane toolbar, click **Move Node Up** to change the position of the category in the list. Click **Move Node Up** until the *Certificates* category is the first listed category.
3. On the form toolbar, click **Save**.

Step 7: Adding Inventory Items to the Sales Categories

Your customers can view and add to their cart items from the online catalog on the Catalog (SP700000) form of the Self-Service Portal if these inventory items have been added to sales categories in Acumatica ERP.

To add inventory items to sales categories, do the following:

1. While you are still viewing the *Item Sales Categories* (IN204060) form, in the **Categories** pane, click the *Fruits* category, to which you will add inventory items.
2. Add an inventory item to the *Fruits* category as follows:
   a. In the right pane, on the table toolbar of the **Category Members** table, click **Add Row**.
   b. In the **Inventory ID** column, select the *GINGER* item.
3. Add all inventory items of the *FOOD* item class to the *Fruits* category as follows:
   a. In the right pane, on the table toolbar of the **Category Members** table, click **Add Items**.
   b. In the **Add Items** dialog box, which opens, do the following:
      a. In the **Add Items** box, select *By Class*.
      b. In the **Item Class** box, select *FOOD*.
      c. Click **Add** to add the items to the category and close the dialog box.
4. Add all inventory items of the *JCRCFGPRT* (parts of configurable juicers) item class to the *Spare Parts* category as follows:
   a. In the left pane, click the *Spare Parts* category, to which you will add inventory items.
   b. In the right pane, on the table toolbar of the **Category Members** table, click **Add Items**.
   c. In the **Add Items** dialog box, which opens, do the following:
      a. In the **Add Items** box, select *By Class*.
      b. In the **Item Class** box, select *JCRCFGPRT*.
      c. Click **Add** to add the items to the category and close the dialog box. The system saves your changes automatically.

      > You can add an inventory item to multiple categories, if needed.

Step 8: Removing an Inventory Item from the Catalog

If you remove an item from a particular sales category, it will no longer be shown under that category in the Self-Service Portal. To remove an item from a category, do the following:

1. While you are still viewing the *Item Sales Categories* (IN204060) form, in the **Categories** pane, select the *Fruits* category, from which you want to remove the *GINGER* item.
2. In the right pane, in the **Category Members** table, select the unlabeled check box in the row with the *GINGER* item.
3. On the table toolbar, click **Delete Row**.
4. On the form toolbar, click **Save**.

   You can see the modified list of sales categories for inventory items in the following screenshot.

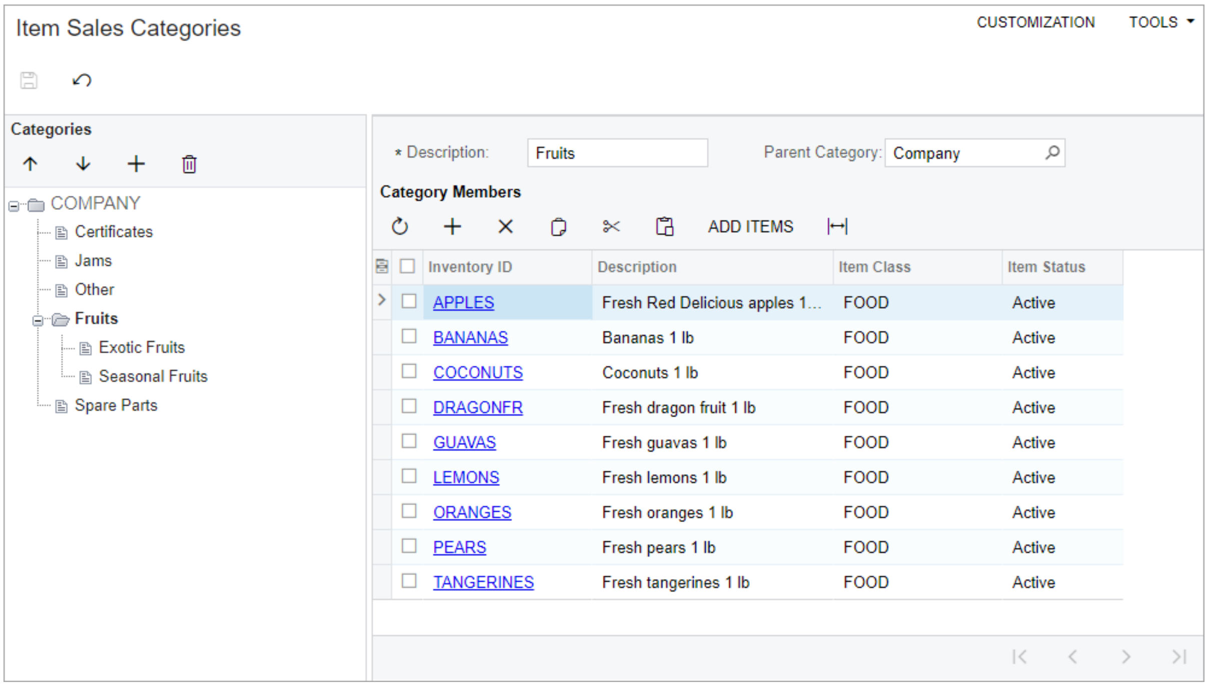


   Figure: The sales categories for inventory items

5. Sign out of the system.

Step 9: Reviewing the Inventory Catalog in the Self-Service Portal

To verify that the changes you have made to the sales categories are reflected in the catalog in the Self-Service Portal, do the following:

1. Sign in to the Self-Service Portal as Tonya Lawrence by using the *tonya@storehut.example.com* username and the *123* password.
2. In the **Orders** workspace, click **Catalog**. The Catalog (SP700000) form opens.
3. In the **Category** box of the Selection area, click the magnifier button to open the list of sales categories for inventory items.
4. Make sure that you can see the *Fruits* and *Spare Parts* categories, which you have added in this activity. In the *Fruits* category, make sure that you can see the *Exotic Fruits* and *Seasonal Fruits* subcategories, which you have also created.

5. Double-click *Fruits*. The system inserts the value in the **Category** box and closes the list of sales categories.
6. In the table, make sure that you can see the inventory items that you have added in this activity (except *GINGER*, which you have deleted).
7. In the **Inventory ID** column, click the *APPLES* link. In the **Item Details** dialog box, which opens, view the image that you have uploaded in this activity. Close the dialog box.
8. In the row that has *APPLES* in the **Inventory ID** column and *Fresh Red Delicious apples 1 lb* in the **Description** column, do the following:
   - In the **Qty.** column, type `5`.
   - Select the **Add to Cart** check box.

   Notice that the description is the updated one you specified earlier in the activity.
9. On the table toolbar, click **Add to Cart**. Under the form toolbar, notice that a message about the item in the cart is shown. (See the following screenshot.)

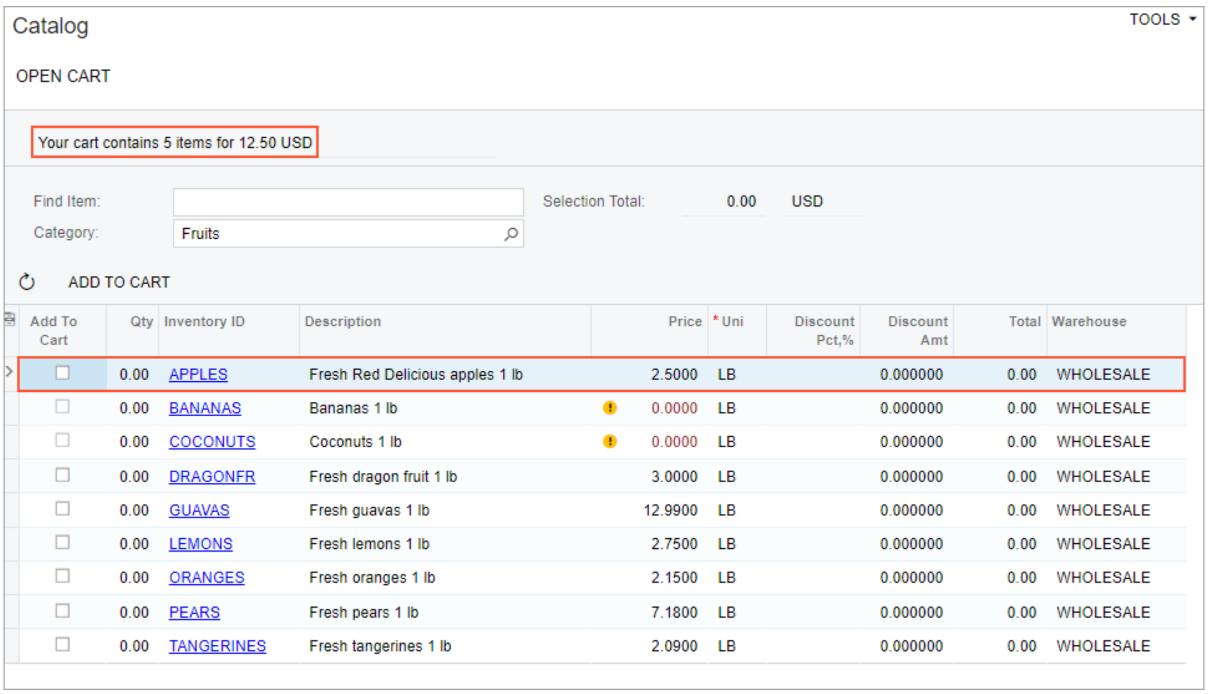


Figure: The items and the message about the items in the cart on the Catalog form

You have reviewed the catalog of inventory items in the Self-Service Portal.

Lesson 4: Configuring Case Management in the Self-Service Portal

This lesson explains how you can configure case management functionality in the Self-Service Portal.

Configuring Case Management in the Self-Service Portal: General Information

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

This lesson provides information about configuring case management in the Self-Service Portal and the flow of data between the Self-Service Portal and Acumatica ERP instances.

Learning Objectives

In this lesson, you will do the following:

- Become familiar with case processing in the Self-Service Portal
- Develop an understanding of the tasks that must be performed for the configuration of case management in the Self-Service Portal
- Configure basic case management functionality in the Self-Service Portal
- Verify that the case management functionality in the Self-Service Portal has been correctly configured

Applicable Scenarios

You may need to configure case management in the Self-Service Portal in the following cases:

- You are an implementation consultant, and you need to initially configure the Acumatica ERP instance and the Self-Service Portal.
- You are an implementation consultant who has already implemented the Acumatica ERP instance and the Self-Service Portal. You need to configure case management in the Self-Service Portal because this is a new process in your company.

Workflow of the Case Management Implementation in the Self-Service Portal

To prepare the system for case management implementation, you perform the following general steps:

1. You perform the initial configuration of the Self-Service Portal. For details, see *Configuring the Self-Service Portal: General Information*.
2. You set up access for users to the Self-Service Portal. For details, see *Managing Access to the Self-Service Portal: General Information*.
3. In Acumatica ERP, on the *Enable/Disable Features* (CS100000) form, you enable the following features:
   - *Case Management*: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
   - *Case Management on Portal*: This feature gives your customers the ability to add cases and track case processing through the Self-Service Portal.

- *Financials on Portal*: This feature gives your customers the ability to view the documents associated with their company accounts in Acumatica ERP.

4. In Acumatica ERP, on the *Case Classes* (CR206000) form, you make sure that the needed case classes have been created. For the case classes that should be available for selection to customer contacts in the Self-Service Portal, the **Internal** check box in the Summary area has been cleared.
5. In Acumatica ERP, on the *Contact Classes* (CR205000) form, you make sure that the needed contact classes have been created. For the contact classes that should be available for selection to customer administrators in the Self-Service Portal, the **Internal** check box in the Summary area of the form has been cleared.
6. In Acumatica ERP, on the *Business Account Classes* (CR208000) form, you make sure that the needed business account classes have been created. For the business account classes that should be available for selection to customer administrators in the Self-Service Portal, the **Internal** check box in the Summary area of the form has been cleared.
7. In Acumatica ERP, on the *Attributes* (CS205000) form, you make sure that the needed attributes for case classes have been created. For the attributes that should be available for selection to customer contacts in the Self-Service Portal, the **Internal** check box in the Summary area of the form has been cleared.
8. In the Self-Service Portal, on the Portal Preferences (SP800000) form, you specify the basic case management settings, as described in *Configuring Case Management in the Self-Service Portal: Implementation Activity*.

Case Processing in the Self-Service Portal

In the Self-Service Portal, the customer contacts can do the following while working with the cases:

- Create a case on the New Case (SP203000) form.
- View the information provided in a case, check the progress of the case, enter additional information, and close the case on the Case Details (SP203010) form.
- View the list of open cases on the Open Cases (SP204000) form. A customer contact can narrow the range of open cases listed by the creator and the contract (if applicable).
- View the list of closed cases on the Closed Cases (SP204010) form. A customer contact can narrow the range of closed cases listed by the creator and the contract (if applicable).

In the Self-Service Portal, as a case is processed, the case may be assigned one of the following statuses:

- *New*: A customer has submitted the new case to the support team.
- *Open*: The support team is working on the case.
- *Pending Customer*: The support team is waiting for information or a response from the customer who has reported the case.
- *Closed*: The support team has resolved and closed the case.
- *Released*: The support team has resolved the case and released it, which causes a case-related invoice to be created.

Support teams usually process cases based on their priority. A case may be assigned to a case owner (that is, the representative of a support team who is responsible for resolving the case). The system inserts the status of the case based on actions by the customer or the support team members. When a case owner starts working on a case, the owner changes the status of a case from *New* to *Open*. You can see the status of a particular case in the Summary area of the Case Details (SP203010) form, and the statuses of cases in the tables on the Open Cases (SP204000) and Closed Cases (SP204010) forms.

When a case is updated or a support representative requests additional information, the contact who has reported the case will get an email notification if notifications have been configured in Acumatica ERP by system administrator. Also, a customer contact can monitor the case by using the Open Cases (SP204000) form.

When a case has the *Open* status, on the Case Details (SP203010) form, the customer contact can add any new or additional information to the case at any time, if needed. The customer contact clicks the **Add Comment** action on the form toolbar to open the **New Comment** dialog box, in which the customer contact can add comments and attach files. When the customer contact saves a new comment, the system lists the comment on the **Activities** tab of the form. The **Case Description** tab is unavailable for editing.

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

A customer contact can close the case in the Self-Service Portal, if needed.

Closing of a Case in the Self-Service Portal

When a support team finishes working on a case, they set the case status to *Closed*. The case can be closed with one of the following reasons, which a Self-Service Portal user can view on the Case Details (SP203010) form or the Closed Cases (SP204010) form:

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

Template-Based Emails Related to Cases

You can configure Acumatica ERP to automatically send template-based emails related to cases. For example, you might set up the system to send an email to a customer who has submitted a case when the case has been closed. For details, see *Business Events: Subscribers*.

Configuring Case Management in the Self-Service Portal: Implementation Activity

In the following implementation activity, you will configure the case management functionality in the Acumatica Self-Service Portal.

Story

Suppose that you are Kimberly Gibbs, system administrator at the SweetLife Fruits & Jams company. You need to configure the case management functionality in the SweetLife Self-Service Portal to give customers the ability to submit and track cases.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.
- On the *Contact Classes* (CR205000) form, the *STORE* contact class has been created.
- On the *Case Classes* (CR206000) form, the *DELIVERY* and *JREPAIR* (repair of juicers) case classes have been created.
- On the *Cases* (CR306000) form, the *Cleaning and maintenance of juicers* case has been created and assigned to Jeffrey Vega.

Process Overview

In this activity, you will do the following:

1. Sign in to Acumatica ERP. In Acumatica ERP, on the *Enable/Disable Features* (CS100000) form, enable the features needed for case management.
2. Sign in to the Self-Service Portal. On the Portal Preferences (SP800000) form, specify the basic settings for case management. You will then select a notification template that the system will use for sending email notifications to the case owners about new comments in cases.
3. In the Self-Service Portal, verify that a user can create a case.
4. In Acumatica ERP, verify that a case owner receives an email notification about a new comment in a case.

System Preparation

Before you start configuring case management in the Self-Service Portal, do the following:

1. Launch the Acumatica ERP website with the *U100_SSP_Admin_2025 R1* dataset preloaded and sign in as system administrator by using the *gibbs* username and the *123* password.
2. In Acumatica ERP, for the *STOREHUT* business account on the *Business Accounts* (CR303000) form, make sure that the *STORE* business account class is selected in the **Class** box.
3. Make sure that you have performed the following prerequisite activities:
   a. *Configuring the Self-Service Portal: To License the Self-Service Portal Instance*
   b. *Configuring the Self-Service Portal: To Specify the General Settings of the Self-Service Portal*
   c. *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*
   d. *Managing Access to the Self-Service Portal: To Create User Types for User Accounts*
   e. *Managing Access to the Self-Service Portal: To Create User Accounts for Contacts*

Step 1: Enabling the Needed Features

To enable the features needed for case management, do the following:

1. Open the *Enable/Disable Features* (CS100000) form.
2. On the form toolbar, click **Modify**.
3. Make sure that under the *Customer Management* group of features, the **Case Management** check box is selected.
4. Under the *Customer Portal* groups of features, select the **Case Management on Portal** check box.

5. Make sure that the **Financials on Portal** check box is selected.
6. On the form toolbar, click **Enable** to enable the features.

Step 2: Specifying the Basic Case Management Settings

To specify the basic settings for case management in the Self-Service Portal, do the following:

1. Launch the Self-Service Portal and sign in to the system as system administrator by using the *gibbs* username and the *123* password.
2. Open the Portal Preferences (SP800000) form.
3. In the **CRM Settings** section of the **General Settings** tab, do the following:
   a. In the **Default Case Class** box, select *JREPAIR* (the case class defined for cases for the repair of juicers). This class will be inserted by default when a user creates a new case, but the user can change the case class.
   b. In the **Priority** box, make sure that the *Medium* is selected.
   c. In the **Default Contact Class** box, select *STORE*. This class will be inserted by default when a user creates a new contact, but the user can change the contact class.
4. On the form toolbar, click **Save**.

Step 3: Setting Up Email Notifications About a New Comment in a Case

You can set up the Self-Service Portal so that each time a user creates a new comment in a case, an email notification will be sent to the case owner (an employee of your company).

To set up these email notifications, do the following:

1. While you are still viewing the Portal Preferences (SP800000) form, in the **Case Activity Notification Template** box, select *New Case Comment from Portal*. This template will be used in an email to a case owner if a new comment has been added to the case.

   This template is among the predefined notification templates that are provided with Acumatica ERP.

2. On the form toolbar, click **Save**.
3. Sign out of the Self-Service Portal.

Step 4: Verifying That a User Can Create a Case in the Self-Service Portal

To create a case in the Self-Service Portal for testing purposes, do the following:

1. Sign in to the Self-Service Portal as Ray Newman by using the *ray.newman@storehut.example.com* username and the *123* password.
2. On the main menu panel, click **Support** to open the **Support** workspace.
3. Click *New Case*.
4. In the Summary area of the New Case (SP203000) form, which opens, do the following:
   a. In the **Priority** box, select *Medium*.
   b. In the **Class ID** box, select *DELIVERY*.
   c. In the **Subject** box, type `Delivery of the missing 5 jars of apple jam`.
5. On the **Details** tab, in the text area, describe the issue, as shown in the following example:

```
Hi! The order of 15 jars each of pear, plum, and apple jam was not
delivered in full because only 10 jars of apple jam were provided. Please
deliver the missing 5 jars of apple jam.
```

6. On the **Attributes** tab, in the **Value** column of the only row, select *Apple jam 32 oz*.
7. On the form toolbar, click **Submit**.

   The system saves the case, closes the New Case (SP203000) form, and opens the Case Details (SP203010) form with the case you have created. On the **Case Description** tab of this form, you can view the details of the case.

   > You use the New Case (SP203000) form only when you enter and submit a case; once the case has been submitted, you view the case and its information on the Case Details (SP203010) form.

You have verified that a portal user can create cases in the Self-Service Portal.

Step 5: Adding a Comment to a Case

To add a comment to the *Cleaning and maintenance of juicers* case, do the following:

1. On the main menu panel, click **Support**. The **Support** workspace opens.
2. Click *Open Cases*. The Open Cases (SP204000) form opens.
3. In the Selection area, clear the **Me** check box. Now you can see all the cases created by the employees of Storehut.
4. In the row with *Cleaning and maintenance of juicers* in the **Subject** column, click the link in the **Case ID** column. The case opens on the Case Details (SP203010) form. Notice that in the **Assigned To** box of the Summary area, *Jeffrey Vega* is specified.
5. On the form toolbar, click **Add Comment**.
6. In the **New Comment** dialog box, which opens, do the following:
   a. In the **Summary** box, type `Appointment`.
   b. In the text area, type your comment, such as the following:

      ```
      You can come on Monday or Tuesday, anytime from 9 AM to 4 PM. Thanks!
      ```
   c. On the dialog box toolbar, click **Save & Close**.

The system has added your comment as an activity of the *Note* type on the **Activities** tab of the form. Now you can verify that Jeffrey Vega, a technician at SweetLife and the owner of the case, has received an email notification about the new comment in the case.

Step 6: Verifying Receipt of the Email Notification About a New Comment in the Case

To make sure that the case owner *Jeffrey Vega* has received an email notification about a new comment in the case, do the following:

1. Sign in to Acumatica ERP as system administrator Kimberly Gibbs by using the *gibbs* username and the *123* password.
2. On the *Cases* (CR306000) form, open the *Cleaning and maintenance of juicers* case.
3. On the **Activities** tab, notice that a row with the *Note* type has been added to the table.
4. Open the *All Emails* (CO409070) form.
5. On the **All Records** tab, open the *New comment on Case #000014* email, and verify that it contains the text defined in the previous step of the current activity.

The case number may be different depending on the number of cases you submitted.

Lesson 5: Tailoring the Self-Service Portal

This lesson explains how you can modify generic inquiries, design dashboards, add widgets based on generic inquiries as well as other widgets to the dashboards, and create and modify workspaces in the Acumatica Self-Service Portal.

Tailoring the Self-Service Portal: General Information

You can tailor the Self-Service Portal based on the business processes of your customer's organization. You can modify or design a dashboard for your customers, add or change a workspace, and create a generic inquiry, which can be used for a widget on a dashboard.

Learning Objectives

In this lesson, you will do the following:

- Create a generic inquiry in the Self-Service Portal
- Create and design a dashboard in the Self-Service Portal
- Create a workspace in the Self-Service Portal

Applicable Scenarios

You may need to tailor the Self-Service Portal in the following cases:

- You are an implementation consultant and you need to create a generic inquiry in the Self-Service Portal according to your company's business needs.
- You are an implementation consultant and you need to change a Self-Service Portal workspace or create a new workspace according to your customer's business needs.
- You are an implementation consultant and you need to design a dashboard in the Self-Service Portal to display data related to your customer's business.

Generic Inquiries

Acumatica ERP includes predefined generic inquiries, whose settings can be viewed on the *Generic Inquiry* (SM208000) form. These predefined generic inquiries are stored in the system data—that is, the data of the *System* tenant, which is the tenant installed by the system. The generic inquiries are also available in the Self-Service Portal.

Users can also create or modify generic inquiries without programming. For details on working with generic inquiries, see *Tailoring the Self-Service Portal: Creation and Modification of Generic Inquiries*.

Workspaces in the Self-Service Portal

A *workspace* is a menu that displays links to forms, reports, and dashboards of a particular functional area. A workspace may also contain tiles for frequently accessed forms (optionally with key settings filled in) and categories for grouping the links, such as **Profiles**, **Reports**, and **Preferences**. For more details about the UI elements of a workspace, see *Learning About the Acumatica ERP UI*.

For details on configuring workspaces, see *Tailoring the Self-Service Portal: Creation and Modification of Workspaces*.

Dashboards

A *dashboard* is a collection of widgets that are displayed on a single screen. With Acumatica ERP dashboards, you can monitor current financial, operational, and organizational information of your company, and analyze real-time trends that relate to your job. On dashboards, different types of information can be displayed in various presentation forms—such as text, charts, graphs, and tables—depending on your preferences and the specific type of data you want to see.

Acumatica ERP dashboards support various types of widgets, which have drill-down capabilities. By using the drill-down capabilities, a customer contact can navigate directly from a dashboard widget to the source of the data you are viewing, so that this contact can learn more about and take actions on the data that is highlighted on the dashboard. This data might be, for example, the number of cases in progress or orders placed.

For details on designing dashboards, see *Tailoring the Self-Service Portal: Creation and Design of Dashboards*.

Tailoring the Self-Service Portal: Creation and Modification of Generic Inquiries

A generic inquiry collects the data from the Acumatica ERP database based on the settings you specify when you design the inquiry. It then sorts, filters, and displays the inquiry results according to the settings specified for the inquiry on the *Generic Inquiry* (SM208000) form, so that a user does not have to perform all these steps manually. Because generic inquiries provide so much flexibility, the inquiry design process depends on your organization's specific business needs.

Acumatica ERP provides a number of predefined generic inquiries to address common needs for information. If any predefined generic inquiry provides similar results to those requested by users, you can make a copy of the predefined generic inquiry and modify the copy to meet the company's specific needs.

You can also build generic inquiries from the ground up. The design of a generic inquiry may include the following general steps, which are described further in this topic:

1. Preparation for creation of a generic inquiry
2. Creation of the generic inquiry
3. Preview of the generic inquiry
4. Refinement of the generic inquiry
5. Publication of the generic inquiry
6. Specification of access rights to the generic inquiry
7. Modification of the published generic inquiry

Preparation for the Creation of a Generic Inquiry

To design a generic inquiry in Acumatica ERP, you need to have general knowledge of data access classes (DACs). In Acumatica ERP, the data is stored in a database, but users do not access the database directly; instead, they access it through data access classes. When building inquiries, you retrieve data from the data access classes rather than working with the database tables directly.

Before you begin creating the generic inquiry, you gather the needed information by doing the following:

1. *Identifying the DACs to be used for the inquiry*: The data to be used in a generic inquiry is available through DACs, which represent specific data from the system database. Based on the business needs the inquiry will meet, you need to decide what general type of data you want to collect from the system database in order to list it in the results grid of the inquiry form. Thus, you need to know on which form this data is entered.

2. *Inspecting UI elements to find the DACs and data fields*: Based on the data you will use in the generic inquiry, you have to open the data entry forms where the data is entered and explore the user interface elements of the forms to find out which classes and data fields you can use to access this data.

   For example, to discover the data access class that provides access to the sales order numbers, you need to inspect the form elements of the *Sales Orders* (SO301000) form.

For more information, see *DAC Discovery: General Information*.

Copying and Modification of a Predefined Generic Inquiry

Based on a request for a generic inquiry to be created, you may decide that modification of a predefined generic inquiry would be faster than designing and creating the generic inquiry from the ground up. In this case, you should work with a copy of the predefined generic inquiry rather than modifying it directly.

If you were to directly modify any predefined generic inquiries in the system, the system would not update the settings of any predefined generic inquiries that you have modified. That is, after an upgrade, any predefined generic inquiries that you have changed would not include any changes that may have been made to the system data with this upgrade. For example, if a database table previously included in the generic inquiry was removed in the system data of a newer version of Acumatica ERP, after an upgrade to this version, the modified generic inquiry that includes this table will no longer work.

Thus, we strongly recommend that instead of directly modifying a predefined generic inquiry, you make a copy of the predefined inquiry and modify the copy. This approach is shown in *Tailoring the Self-Service Portal: To Create a Generic Inquiry*.

Creation of a Generic Inquiry

To create a generic inquiry, you perform the following general steps:

1. Creating a generic inquiry: You create a generic inquiry on the *Generic Inquiry* (SM208000) form. For easier navigation between inquiries, we recommend that your organization define and follow naming conventions for the inquiry titles that you will enter in the **Inquiry Title** box.

   > On the *Generic Inquiry* form, if you define user-selectable parameters that give users the ability to narrow the inquiry results, you can optionally specify the number of columns in which the inquiry parameters will be arranged on the resulting generic inquiry form, the maximum number of records to be displayed in the inquiry results, and the number of records to be displayed on every page of the inquiry results.

2. Specifying DACs: On the **Data Sources** tab of this form, you select the DACs (which are referred to as *tables* in most user interface elements) to be used in your generic inquiry. For each table, you specify a value in the **Alias** column. This value will be used in SQL statements to designate the table. You can type the value in the **Alias** column manually or leave it empty; if you do not specify a value, the value from the **Source Name** column will be used instead.

3. Configuring the results grid: On the **Results Grid** tab of the form, you select the column values from the DACs to display data. On this tab, you can specify how the results of the search in the database tables should be displayed, with each row on this tab corresponding to a column in the results grid of the inquiry form. You can specify formulas in the **Data Field** column to calculate the values of columns in the results grid by using the Formula Editor dialog box. In this dialog box, the formula can be entered directly in the formula editing area or composed by selecting fields and using operators and functions. For details, see *Modification of Inquiry Results: General Information* and *Formulas in Inquiry Results: General Information*.

Previewing of the Generic Inquiry

After you have completed the basic steps of creating the generic inquiry on the *Generic Inquiry* (SM208000) form and saved the settings that you have specified on the form, you can preview the generic inquiry form to make sure it meets your expectations. You can preview an inquiry directly from this form by clicking the eye icon on the side panel of the *Generic Inquiry* form. In this case, the system displays the resulting generic inquiry form on the panel of the form in the same browser tab. You can also preview an inquiry by clicking the **View Inquiry** button on the form toolbar. In this case, the system displays the resulting generic inquiry form in a new browser tab.

You can preview an inquiry form by clicking the eye icon on the side panel of the form except in the following cases:

- The *Side Panel* option is selected in the **Window Mode** column of any row on the **Navigation Targets** pane of the **Navigation** tab of the *Generic Inquiry* form.
- Advanced filters have been created on the resulting inquiry form.

Refinement of the Generic Inquiry

The creation of a generic inquiry can involve additional specifications, based on the business needs of the users. In this case, you can use other tabs of the *Generic Inquiry* (SM208000) form to achieve the needed results, previewing the refined inquiry form as you make changes.

To further refine the generic inquiry you are designing, you can make changes to the following:

- Table relations: You can specify table relations between data access classes on the **Relations** tab, so that the system can generate SQL requests to get the required data from the tables involved. In the **Table Relations** area of this tab, you can specify the relations between **Parent** and **Child** tables by selecting a **Join Type**. In the **Data Field Links for Active Relations** area of this tab, for each pair of related tables, you can specify the link condition between the columns of the tables. For more details about table relations, see *Data from Multiple Data Sources: General Information*.
- Parameters: On the **Parameters** tab, you select and configure the parameters to be placed in the Selection area of the generic inquiry form. The user can make selections in this area to filter the data displayed in the table. For more details about parameters and conditions, see *Conditions and Parameters: General Information*.
- Conditions: You can use the **Conditions** tab to specify conditions that filter the data to be displayed. For example, an inquiry displaying a customer's balance, based on the specified conditions, can hide invoices with a balance of zero. For more details about parameters and conditions, see *Conditions and Parameters: General Information*.
- Grouping: You can group inquiry data by specifying grouping conditions on the **Grouping** tab. For example, you can group sales orders by date and status to get the count of sales orders and their total and average amounts for each day and each status.
- Sorting: You can use the **Sort Order** tab to specify how the inquiry data is sorted—that is, the default order in which the results should be displayed on the inquiry form. For more details about the sorting and grouping, see *Sorting and Grouping: General Information*.
- Entry point: By using the **Entry Point** tab, you can optionally define the generic inquiry to be an entry point (that is, a substitute form) instead of the existing primary Acumatica ERP form. If you do this, when a user clicks the name of the primary form while navigating or searching, the system will open the generic inquiry form containing the list of records, and when the user clicks the name of a record in the list, the primary form will open with that record selected. For more details about making a generic inquiry an entry point, see *Generic Inquiry as a Substitute Form: General Information*.
- Navigation: On the **Navigation** tab, you can optionally configure inquiry columns to contain links to forms and webpages. For details, see *Navigation Configuration: General Information*.

You might also want to change the inquiry title you have initially specified. To do this, you click **Change Inquiry Title** on the More menu of the *Generic Inquiry* form. In the dialog box that opens, you enter the new inquiry title for the generic inquiry and click **OK**. If this inquiry title is not unique, the system displays an error; you can enter another inquiry title. If the title is unique, the dialog box is closed and the new title is inserted in the **Inquiry Title** box. You need to save your changes to the generic inquiry for this new title to be saved to the database.

Publication of the Generic Inquiry

When the inquiry has been created and all the necessary settings have been specified, you can preview and then publish it, so that it can be used by other users. To publish the generic inquiry form, on the form toolbar of the *Generic Inquiry* (SM208000) form, you click the **Publish to the UI** button. In the **Publish to the UI** dialog box, which opens, you can change the default settings of the title, workspace, and category. Also, you can change the automatically assigned screen identifier.

In the **Access Rights** section of the dialog box, you select one of the following option buttons to indicate which access rights should be specified for the newly added form:

- **Set to Granted for All Roles**: The system will set the access rights for this form to *Granted* for all user roles in the system.
- **Set to Revoked for All Roles**: The system will set the access rights for this form to *Revoked* for all user roles in the system.
- **Copy Access Rights from Screen** (default): The system will copy the set of the access rights from the specified form.

To complete the publication process, you click **Publish** in the **Publish to the UI** dialog box.

> For details on the publication of a generic inquiry that is configured as a substitute form, see *Generic Inquiry as a Substitute Form: General Information*.

After you specify the needed settings and click **Publish** in the dialog box, the generic inquiry is published. That is, it is assigned a screen identifier and becomes available in the specified workspace. Also, the system adds the new site map node for this form to the site map and applies the appropriate access rights to this site map node.

The system assigns the inquiry form an automatically generated screen ID in a format similar to that of the screen IDs of other forms in the system. The ID consists of the following:

- The *GI* module code
- A six-digit number that is one greater than the numerical part of the most recently assigned screen ID for a generic inquiry

In the Summary area of the *Generic Inquiry* form, the system fills in the default workspace (that is, *Data Views*) and the default category (*Inquiries*) for this inquiry form, but you can override these settings at any time. For details on the automatic assignment of a workspace and category, see *Categories and Workspaces for Entities of Specific Forms*.

> The screen ID, site map title, workspace, and category of an inquiry can also be modified on the *Site Map* (SM200520) form in Acumatica ERP.

Specification of Access Rights to the Generic Inquiry

After you have published the generic inquiry, you can manage access rights to it. On the *Access Rights by Screen* (SM201020) form, you select a role and one of the predefined levels of access rights. For more information, see *Access Rights to Generic Inquiries: General Information*.

Modification of the Published Generic Inquiry

Users of the published generic inquiry form or their supervisors may request changes to the form.

> In some cases, you will modify the generic inquiry directly. In other situations, including when you work with predefined generic inquiries, you will leave the original inquiry intact, copy it, and make changes to a copy of it.

If you want to modify a generic inquiry form, you can temporarily hide it (that is, make it not visible to other users). To temporarily hide the inquiry, you clear the values of the **Workspace** and **Category** boxes on the *Site Map* (SM200520) form in Acumatica ERP or on the *Generic Inquiry* (SM208000) form in the Self-Service Portal.

Tailoring the Self-Service Portal: To Create a Generic Inquiry

In the following implementation activity, you will create a generic inquiry in the Acumatica Self-Service Portal.

Story

Suppose that you are Kimberly Gibbs, system administrator who also handles generic inquiries at the SweetLife Fruits & Jams company. You need to create a generic inquiry that will display the list of cases for the business account associated with the user. There is a predefined generic inquiry in Acumatica ERP that provides similar functionality. You need to copy it and adjust it for the Self-Service Portal users. This inquiry will be used in the future for building a dashboard.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  > This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.
- On the *Business Accounts* (CR303000) form, the *STOREHUT* business account has been created.
- On the *Cases* (CR306000) form, a few cases for the *STOREHUT* business account have been created.

Process Overview

In this activity, you will do the following:

1. Copy the *CR-Cases* inquiry on the *Generic Inquiry* (SM208000) form
2. Change the needed settings of the copied inquiry
3. Verify that the customer user has access to the created generic inquiry
4. Verify that the customer user can see the cases associated with the business account of the customer user

System Preparation

Before you start creating a generic inquiry in the Self-Service Portal, do the following:

1. Launch the Acumatica ERP instance with the *U100_SSP_Admin_2025 R1* dataset preloaded.

2. Sign in to the system as system administrator Kimberly Gibbs by using the *gibbs* username and the *123* password.
3. On the *Enable/Disable Features* (CS100000) form, make sure that the following features have been enabled:
   - *Customer Portal*
   - *B2B Ordering*
   - *Case Management on Portal*
   - *Financials on Portal*
4. Make sure that you have performed the following prerequisite activities:
   a. *Configuring the Self-Service Portal: To License the Self-Service Portal Instance*
   b. *Configuring the Self-Service Portal: To Specify the General Settings of the Self-Service Portal*
   c. *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*
   d. *Managing Access to the Self-Service Portal: To Create User Types for User Accounts*
   e. *Managing Access to the Self-Service Portal: To Create User Accounts for Contacts*
   f. *Configuring Case Management in the Self-Service Portal: Implementation Activity*
5. Launch the Self-Service Portal website with the *U100_SSP_Admin_2025 R1* dataset preloaded.
6. Sign in to the system as system administrator Kimberly Gibbs by using the *gibbs* username and the *123* password.

Step 1: Copying the Generic Inquiry

To copy the existing generic inquiry, do the following:

1. In the Self-Service Portal, acting as system administrator Kimberly Gibbs, open the *Generic Inquiry* (SM208000) form.
2. In the **Inquiry Title** box of the Summary area, click the magnifier button and search for the *CR-Cases* inquiry.
3. Double-click the record to select it.
4. On the form toolbar, click the **Clipboard** button and then click **Copy**.
5. On the form toolbar, click **Add New Record**.
6. In the **Inquiry Title** box, type `PortalCases`.
7. Press the Tab key or move the focus to any other box on the form.
8. On the form toolbar, click **Clipboard > Paste**. The system inserts and replaces the values on the tabs of the form.

   > The system displays errors on the **Entry Point** and **Navigation** tabs because the copied generic inquiry has a link to the form that does not exist in the Self-Service Portal. You will fix that in the next step.

9. On the **Navigation** tab, in the **Navigation Targets** pane, do the following for each row:
   a. In the **Link** column, click the row.
   b. On the table toolbar, click **Delete Row**.
10. On the **Entry Point** tab, in the **Entry Screen** box (the **Entry Screen Settings** section), click the magnifier button, and double-click *Case Details* in the list of the available forms.
11. On the form toolbar, click **Save**.

You have created a new generic inquiry by copying a predefined inquiry that is available in Acumatica ERP. The created inquiry currently contains data about all cases existing in Acumatica ERP.

You need to restrict access to this information for the Self-Service Portal users so that they can see only those cases that are related to their business account (*STOREHUT*). In the next several steps, you will configure the inquiry to have the proper information in it.

Step 2: Adding DACs to the Created Generic Inquiry

In this step, you will add new DACs to the inquiry. While you are still on the *Generic Inquiry* (SM208000) form with the *PortalCases* inquiry selected, do the following:

1. On the table toolbar of the **Data Sources** tab, click **Add Row**.
2. In the **Source Name** column of the added row, select *PX.Objects.CR.Contact*.

   > The list has about 600 DACs, so in the lookup table, you should use the Search box (upper right) to find the DAC.

3. In the same row, in the **Alias** column, type `CustomerUser`.
4. Add a new row.
5. In the **Source Name** column of the added row, select *PX.Objects.CR.CRCaseClass*.
6. In the same row, in the **Alias** column, type `CaseClass`.
7. On the form toolbar, click **Save**.

Step 3: Specifying Relations in the Generic Inquiry

Now you will specify the relations of the added DACs. While you are still on the *Generic Inquiry* (SM208000) form with the *PortalCases* inquiry selected, on the table toolbar of the **Relations** tab, do the following:

1. On the table toolbar of the **Table Relations** table, click **Add Row**.
2. In the **Parent Table** column of the added row, select *CRCase*.
3. In the **Child Table** column of the same row, select *CustomerUser*.
4. In the same table, click **Add Row**.
5. Specify the following settings for the added row:
   - **Parent Table**: *CRCase*
   - **Child Table**: *CaseClass*
6. On the form toolbar, click **Save**.
7. In the **Table Relations** table, click the row with *CustomerUser* in the **Child Table** column.
8. On the table toolbar of the **Data Field Links For Active Relation** table (which is below the **Table Relations** table), click **Add Row**.
9. In the **Parent Field** column of the added row, select *CustomerID*.
10. Leave the *Equals* value in the **Condition** column of the row.
11. In the **Child Field** column of the same row, select *BAccountID*.
12. On the form toolbar, click **Save**.
13. In the **Table Relations** table of the **Relations** tab, click the row with *CaseClass* in the **Child Table** column.
14. On the table toolbar of the **Data Field Links For Active Relation** table, click **Add Row**.
15. In the **Parent Field** column of the added row, select *CaseClassID*.

16. Leave the *Equals* value in the **Condition** column.
17. In the **Child Field** column of the same row, select *CaseClassID*.
18. On the form toolbar, click **Save**.

Step 4: Adding Conditions to the Generic Inquiry

Now you need to add conditions that will filter the data. While you are still on the *Generic Inquiry* (SM208000) form with the *PortalCases* inquiry selected, do the following:

1. On the table toolbar of the **Conditions** tab, click **Add Row**.
2. In the **Data Field** column of the added row, select *CustomerUser.UserID*.
3. In the **Condition** column, leave the default *Equals* value.
4. In the **From Schema** column, select the check box.
5. In the **Value 1** column, type `@me`.
6. On the table toolbar, click **Add Row**, and in the row, specify the following settings:
   a. **Data Field**: *CaseClass.IsInternal*
   b. **Condition**: *Does Not Equal*
   c. **From Schema**: Selected
   d. **Value 1**: Selected
7. On the form toolbar, click **Save**.

Step 5: Editing Navigation to the Case Details Form

You can add navigation to a specific form by adding a link to the generic inquiry form. With this navigation in place, in the resulting inquiry form, a user can click any case ID and the system will open the Case Details (SP203010) form in a new tab with the details of the selected case.

While you are still on the *Generic Inquiry* (SM208000) form with the *PortalCases* inquiry selected, do the following:

1. Open the **Navigation** tab.
2. On the **Navigation Targets** pane, for the row that has *SP203010 - Case Details* in the **Link** column, select *New Tab* in the **Window Mode** column.
3. On the form toolbar, click **Save**.
4. On the **Results Grid** tab, in the **Navigate To** column of the row with the *CaseCD* data field selected, select *SP203010 - Case Details*. This is the form the system will open if the user clicks a particular case ID in the resulting inquiry form.
5. On the form toolbar, click **Save**.

Step 6: Making the Generic Inquiry Visible for Self-Service Portal Users

Now that you have changed the needed settings of the inquiry, you will make it visible for Self-Service Portal users. While you are still on the *Generic Inquiry* (SM208000) form with the *PortalCases* inquiry selected, do the following:

1. On the form toolbar of the *Generic Inquiry* (SM208000) form, click the **Publish to the UI** button. The **Publish to the UI** dialog box opens.
2. In the dialog box, specify the following settings:
   a. **Site Map Title**: `All Cases`
   b. **Workspace**: *Support*

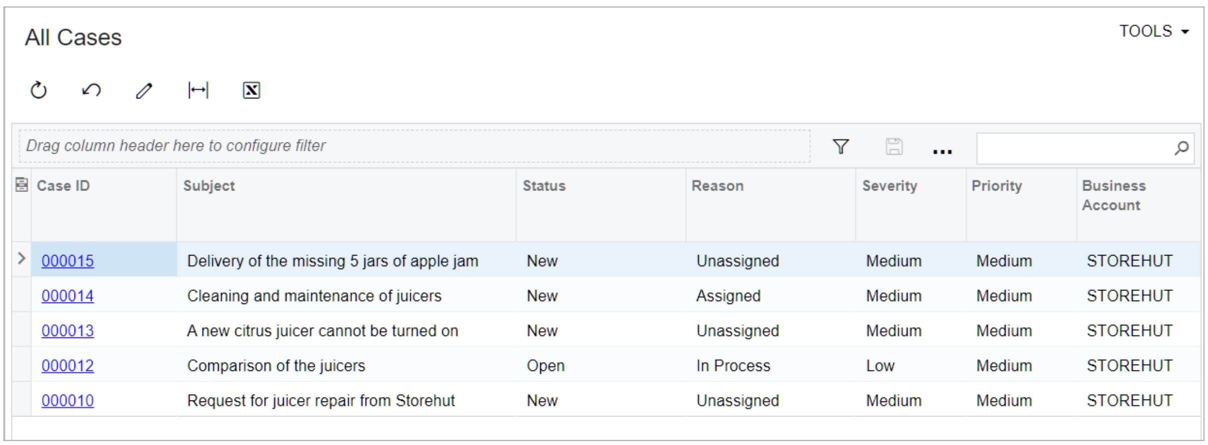
c. **Category**: *Inquiries*

3. In the **Access Rights** section of the dialog box, select the **Set to Granted for all Roles** option button. You might need to specify the roles needed to access this inquiry.
4. Click **Publish** to complete the publication process.
5. Sign out of the Self-Service Portal.

Step 7: Verifying a Customer User's Access to the Generic Inquiry Form

In this step, you will verify that customer users have access to the inquiry by signing in to Ray Newman's user account. Do the following.

1. Sign in to the Self-Service Portal as Ray Newman by using the *ray.newman@storehut.example.com* username and the *123* password.
2. On the main menu, click **Support** to open the **Support** workspace.
3. Under the **Inquiries** category, click *All Cases* to open the generic inquiry.
4. Verify that you can see the list of the cases related to the *Storehut* business account only, as shown in the following screenshot.



All Cases

TOOLS

Drag column header here to configure filter

Case ID	Subject	Status	Reason	Severity	Priority	Business Account
000015	Delivery of the missing 5 jars of apple jam	New	Unassigned	Medium	Medium	STOREHUT
000014	Cleaning and maintenance of juicers	New	Assigned	Medium	Medium	STOREHUT
000013	A new citrus juicer cannot be turned on	New	Unassigned	Medium	Medium	STOREHUT
000012	Comparison of the juicers	Open	In Process	Low	Medium	STOREHUT
000010	Request for juicer repair from Storehut	New	Unassigned	Medium	Medium	STOREHUT

Figure: The All Cases generic inquiry

5. In the row with *Comparison of the juicers* in the **Subject** column, click the link in the **Case ID** column. Make sure that the case opens on the Case Details (SP203010) form in a new browser tab.

Tailoring the Self-Service Portal: Creation and Design of Dashboards

With dashboards, users can monitor current financial, operational, and organizational information, and analyze real-time trends that relate to their job. On dashboards, different types of information can be displayed in various presentation forms—such as text, charts, graphs, and tables.

You can create dashboards and share them with other users as forms. That is, you can place any dashboard in a workspace by adding it to the Acumatica ERP site map and specifying different access levels to the dashboard for the user roles available in the system.

Creation of a Dashboard

You can create a dashboard if you have access to the *Dashboards* (SM208600) form. For details on managing dashboards, see *Administering Dashboard Forms*. For details on designing dashboards, see *Designing Dashboard Contents*.

To add a new dashboard, on the *Dashboards* form, you perform the following steps:

1. Creation: You add the new dashboard, enter its name, and specify the role for the owner of this dashboard. A user with the specified role assigned will be able to populate the dashboard with widgets, modify the dashboard layout, and edit widget properties.
2. Publication: You click the **Publish to the UI** button and make the needed changes to the default values in the **Site Map Title**, **Workspace**, and **Category** boxes. Also, the system assigns the dashboard an automatically generated ID in a format similar to the format of screen IDs of other dashboards, with *DB* as the two-letter module code: *DB000000*. When the ID is assigned, the system adds the dashboard to the site map. This setting controls whether the dashboard is published on the Acumatica ERP site.

   In the **Access Rights** section of the dialog box, you select one of the following option buttons to indicate which access rights should be specified for the newly added form:

   - **Set to Granted for All Roles**: The system will set the access rights for this form to *Granted* for all user roles in the system.
   - **Set to Revoked for All Roles**: The system will set the access rights for this form to *Revoked* for all user roles in the system.
   - **Copy Access Rights from Screen** (default): The system will copy the set of the access rights from the specified form.

   After you specify the needed settings and click **Publish** in the dialog box, the dashboard is published. That is, it is assigned a screen identifier and becomes available in the specified workspace. Also, the system adds the new site map node for this form to the site map and applies the appropriate access rights to this site map node.

   After the dashboard has been published you can adjust access to the dashboard on the **Visible To** tab of the form.

   These settings control whether the dashboard is published on the Acumatica ERP site and where users can find it.
3. Visibility configuration: On the **Visible To** tab of the form, you can modify the access levels for the roles defined in the system. To give the access, you select the *Granted* access level for those roles for which the dashboard should be available.
4. Configuration of additional settings: During this step, you can do any of the following:
   - Allow users who can view the dashboard to create personal copies of the dashboard and to design these copies by selecting the **Allow Users to Personalize** check box. For a newly created dashboard, the check box is selected by default.
   - Select **Expose to the Mobile Application** if the dashboard should be displayed in the Acumatica mobile app connected to your Acumatica ERP site.
   - Specify the parameters for which elements should be displayed in the Selection area of the dashboard on the **Parameters** tab of the form. For example, you can add a date-relative parameter with the default *@WeekStart* value. In this case, the dashboard widgets will display data relevant to the first day of the current week by default. A user can change the parameter value at any time.

After you have created the dashboard, a user with the owner role can populate it with the planned widgets.

> If you will be designing this dashboard, be sure to select a role that you are assigned to as the owner role. Otherwise, you will be working with your personal copy of the dashboard, and other users will not see any widgets that you add to the dashboard.

Types of Widgets

A *widget* is a dashboard component that provides a particular type of information, such as a real-time data view or a wiki article.

Before you create or modify a dashboard, you need to plan how many widgets and which types the dashboard will have. We recommend that you add no more than seven widgets to a particular dashboard. If a dashboard is cluttered with too many widgets, the users viewing the dashboard cannot understand the data quickly and easily.

In the **Add Widget** dialog box, you click one of the following widget types:

- **Chart**: A graphical representation of data from an Acumatica ERP form. You can use charts of various types, such as bar charts and line charts.
- **Data Table**: A systematic display of data from an Acumatica ERP form, with data arranged into rows and columns.
- **Embedded Page**: A document or an image that is stored on an external resource, such as cloud storage.
- **Header**: A title that can be added to the widget section.
- **Key Performance Indicator (KPI)**: A statistical record that measures progress or achievement toward a set performance indicator by showing parameters that are important to the business processes of your organization and should be monitored daily. The following visualization types are available for the widget:
  - *Scorecard*: Data is presented in the form of a card with a single parameter.
  - *Meter*: Data is presented in the form of a gauge with normal, warning, and alarm levels.
- **Link**: A link to an Acumatica ERP form, report, or dashboard.
- **Pivot Table**: A data table organized to filter, sort, count, total, or give the average of data from an Acumatica ERP inquiry, displaying the summarized results in a separate table.
- **Power BI Tile**: A chart, scorecard, or other analytical information that is represented on a Power BI dashboard designed by your organization.
- **Trend Card KPI**: A statistical record showing parameters whose dynamic change is important to the business processes of your organization.
- **Wiki Page**: A reference topic, procedure, business plan, or other content that is frequently consulted by Acumatica ERP users.

Tailoring the Self-Service Portal: To Create and Design a Dashboard

In the following implementation activity, you will configure a dashboard in the Acumatica Self-Service Portal.

Story

Suppose that you are Kimberly Gibbs, system administrator who also handles dashboards at the SweetLife Fruits & Jams company. You need to create the new *Case Activities* dashboard based on a request from a SweetLife customer, the Storehut chain of supermarkets in New York. On the dashboard, the customer's managers should be able to monitor cases reported to SweetLife and have quick access to orders.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

> This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.

Process Overview

In this activity, you will do the following:

1. Create the *Case Activities* dashboard
2. Set up user access rights to the dashboard
3. Add the *Data Table*, *Link*, and *KPI* widgets to the dashboard
4. Select the dashboard layout template
5. Verify that the dashboard has been correctly configured

> The dashboard configuration shown in the screenshots in this activity may slightly differ in its layout from the dashboards that you configure in your system. These differences do not affect the process flow.

System Preparation

Before you start creating and designing a dashboard in the Self-Service Portal, do the following:

1. Sign in to Acumatica ERP as system administrator Kimberly Gibbs by using the *gibbs* username and the *123* password.
2. On the *Enable/Disable Features* (CS100000) form, make sure that the following features have been enabled:
   - *Customer Portal*
   - *B2B Ordering*
   - *Case Management on Portal*
   - *Financials on Portal*
3. Make sure that you have performed the following prerequisite activities:
   a. *Configuring the Self-Service Portal: To License the Self-Service Portal Instance*
   b. *Configuring the Self-Service Portal: To Specify the General Settings of the Self-Service Portal*
   c. *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*
   d. *Managing Access to the Self-Service Portal: To Create User Types for User Accounts*
   e. *Managing Access to the Self-Service Portal: To Create User Accounts for Contacts*
   f. *Managing the Inventory Catalog in the Self-Service Portal: Implementation Activity*
   g. *Configuring Case Management in the Self-Service Portal: Implementation Activity*
   h. *Tailoring the Self-Service Portal: To Create a Generic Inquiry*
4. Launch the Self-Service Portal website with the *U100_SSP_Admin_2025 R1* dataset preloaded.
5. Sign in to the system as system administrator by using the *gibbs* username and the *123* password.

Step 1: Creating a Dashboard

To create the *Case Activities* dashboard, do the following:

1. In the Self-Service Portal, open the *Dashboards* (SM208600) form.
2. In the Summary area, do the following:
   a. In the **Name** box, type `Case Activities`.
   b. In the **Owner Role** box, select *Portal Admin*.
   c. Clear the **Allow Users to Personalize** check box. Portal users should not be given the ability to make personalized copies of the dashboard.
3. On the form toolbar, click the **Publish to the UI** button. The **Publish to the UI** dialog box opens.
4. In the dialog box, specify the following settings:
   a. **Site Map Title**: `Case Activities`
   b. **Workspace**: *Support*
   c. **Category**: *Dashboards*
5. In the **Access Rights** section of the dialog box, select the **Copy Access Rights from Screen** option button. Make sure that *Dashboards* is selected in the box right of the option button.
6. Click **Publish** to complete the publication process.

You have created an empty dashboard. In the next step, you will set up access rights for users to this dashboard.

> The system assigns the dashboard an automatically generated ID in a format similar to that of the screen IDs of other dashboards, with *DB* as the two-letter module code: *DB000000*. When the ID is assigned, the system adds the dashboard to the site map. Because a workspace and category have been specified, a user with the *Portal Admin* role can access the dashboard through the workspace.

Step 2: Setting Up User Access Rights for an Administrator to the Dashboard

Now you need to change the access rights to the dashboard so that users with the *Portal Admin* role can add widgets to the dashboard and users with *Customer Admin* and *Customer User* roles can view the dashboard.

While you are still viewing the *Case Activities* dashboard on the *Dashboards* (SM208600) form in the Self-Service Portal, do the following:

1. On the **Visible To:** tab, in the row that has *Portal Admin* in the **Role** column, make sure that the *Granted* option is selected in the **Access Rights** column.

   > You can type the name of the role into the Search box in the lower part of the tab to quickly find the role.

   With these access rights, the *gibbs* user can view the dashboard because *Portal Admin* is the owner role you specified for the dashboard.
2. In the row that has *Customer Admin* in the **Role** column, select *Granted* in the **Access Rights** column.
3. On the form toolbar, click **Save**.
4. In the row that has *Customer User* in the **Role** column, select *Granted* in the **Access Rights** column.
5. On the form toolbar, click **Save**.
6. On the form toolbar, click **View**. The *Case Activities* dashboard opens. The dashboard is empty because you have not yet added any widgets to it.

7. On the dashboard title bar, make sure that the **Design** button is displayed. This indicates that the user can modify the dashboard.

You have set up access rights for the Self-Service Portal administrator and users and verified that you have correctly set up the access rights for the administrator. Now you can populate the dashboard with widgets, which you will do in the next steps of this activity.

Step 3: Adding a Data Table Widget to the Dashboard

To add a *Data Table* widget to the dashboard in the Self-Service Portal, do the following:

1. While you are still viewing the *Case Activities* dashboard, on the dashboard title bar, click the **Design** button to switch to design mode.
2. In the widget placeholder in the upper part of the screen, click *Add a new widget*. The **Add Widget** dialog box opens.
3. In the **Add Widget** dialog box, click **Data Table**.
4. Click **Next**.
5. In the **Inquiry Screen** box of the **Widget Properties** dialog box, which opens, click the magnifier button. The lookup table opens.
6. In the Search box, type `cases`.
7. In the **Title** column, double-click *Open Cases*, which closes the lookup table and fills in the **Inquiry Screen** box of the dialog box.
8. Click **Inquiry Parameters**.
9. In the **Inquiry Parameters** dialog box, which opens, do the following:
   a. Clear the **Me** check box.
   b. Click **OK**.
10. In the **Widget Properties** dialog box (which you return to after closing the **Inquiry Parameters** dialog box), select the **Automatically Adjust Height** check box.
11. Click **Column Settings**.
12. In the **Column Settings** dialog box, which opens, move columns from the **Selected Columns** list to the **Available Columns** list by selecting each needed column and then clicking the arrow pointing left. The **Selected Columns** list should contain only the following columns:
    - **Subject**
    - **Status**
    - **Reason**
    - **Severity**
    - **Priority**
    - **Contact**
13. Click **OK**. The **Column Settings** dialog box is closed.
14. In the **Caption** box of the **Widget Properties** dialog box (to which you return), type `open cases` to specify the title of the widget.
15. Click **Finish** to create the widget with the settings you have specified, save it, and add it to the dashboard.
16. On the dashboard title bar, click the **Design** button to switch to view mode.

Step 4: Adding a Link Widget to the Dashboard

To add a *Link* widget to the dashboard in the Self-Service Portal, do the following:

1. While you are still viewing the *Case Activities* dashboard, on the dashboard title bar, click the **Design** button to switch to design mode.
2. In the widget placeholder in the right part of the screen, click *Add a new widget*. The **Add Widget** dialog box opens.
3. In the dialog box, click **Link**.
4. Click **Next**.
5. In the **Widget Properties** dialog box, which opens, do the following:
   a. In the **Icon** box, select the *visibility* icon, which will be displayed in the widget.

      You can begin typing the name of the icon into the box to quickly find the icon.

   b. In the **Form** box, do the following:
      a. Click the magnifier button.
      b. In the lookup table that opens, in the Search box, type `orders`.
      c. In the **Title** column, double-click *My Orders*, which closes the lookup table and fills in the **Form** box of the dialog box.
   c. In the **Caption** box, type `My Orders`.
   d. Click **Finish** to save your changes and close the dialog box.

      The widget is added to the workspace.
6. On the dashboard title bar, click the **Design** button to switch to view mode.

You can see the *Case Activities* dashboard with the *Open Cases* and *My Orders* widgets in the following screenshot.

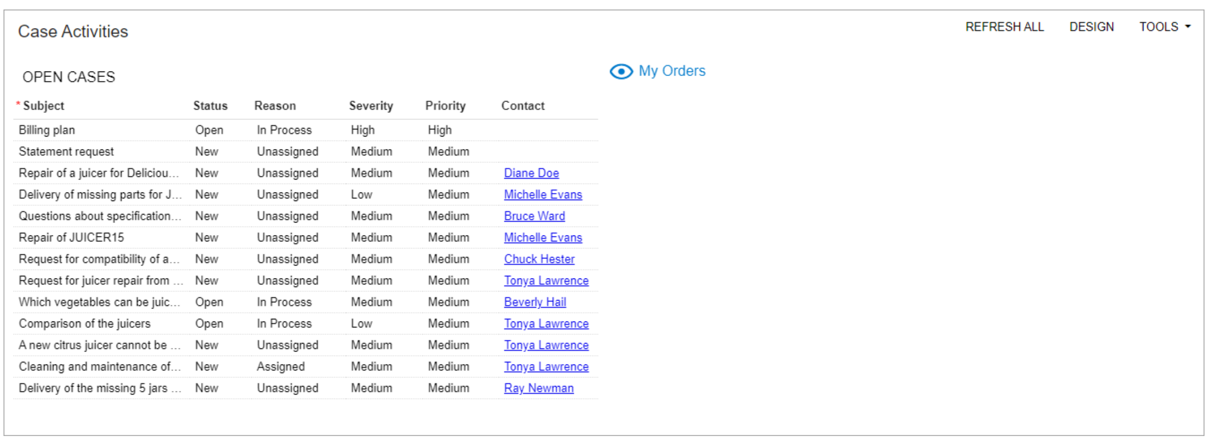


Figure: The Case Activities dashboard with the Data Table and Link widgets

Step 5: Adding a KPI Widget of the Meter Visualization Type to the Dashboard

In this step, in the Self-Service Portal, you will create a *Key Performance Indicator (KPI)* widget based on the *All Cases* generic inquiry. This widget will display the total number of cases and their level in the number of cases. To add the *KPI* widget to the dashboard, do the following:

1. While you are still viewing the *Case Activities* dashboard, on the dashboard title bar, click the **Design** button to switch to design mode.
2. In the widget placeholder in any part of the screen, click *Add a new widget*. The **Add Widget** dialog box opens.
3. In the dialog box, click **Key Performance Indicator (KPI)**.

4. Click **Next**.
5. In the **Widget Properties** dialog box, which opens, do the following:
    a. In the **Inquiry Screen** box, select the *All Cases* inquiry, which will be used as a base for the widget.
    b. In the **Field to Aggregate** box, select *Case ID*.
    c. In the **Aggregate Function** box, make sure the *Count All* is selected.
    d. In the **Normal Level Type** box, leave the default *Fixed Value*.
    e. In the **Normal Level** box, specify `10`.
    f. In the **Alarm Level Type** box, select *Percent Value*.
    g. In the **Alarm Level** box, specify `140`. We specify 150% to revert the levels. 10 cases will be a normal level, from 11 to approximately 15 cases will be a warning level, and from 16 to 20 cases will be an alarm level.
    h. Define the colors as follows:
        - **Normal Color**: *Green*
        - **Warning Color**: *Orange*
        - **Alarm Color**: *Red*
    j. In the **Visualization Type** box, select *Meter*.
    k. In the **Caption** box, type `case volume`.
    l. Click **Finish** to save your changes and close the dialog box.

        The widget is added to the workspace.
6. On the dashboard title bar, click the **Design** button to switch to view mode.

You can see the *Case Activities* dashboard with the *Case Volume* widget in the following screenshot.

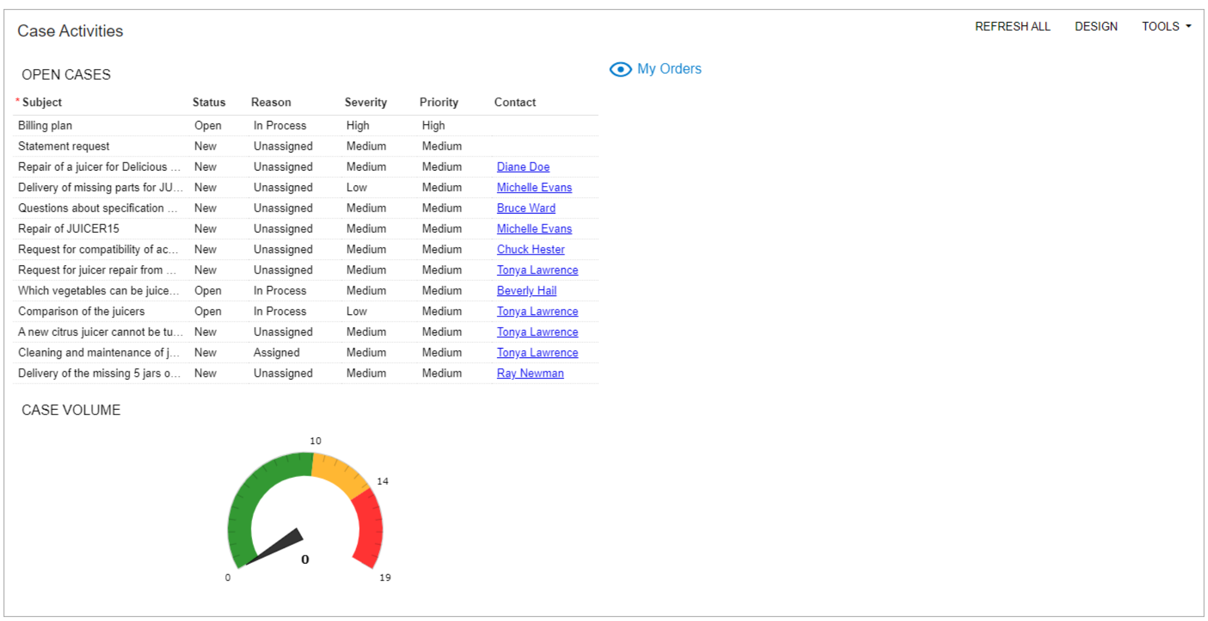


Figure: The Case Activities dashboard with the KPI widget of the Meter visualization type

Step 6: Adding KPI Widgets of the Scorecard Visualization Type to the Dashboard

In this step, in the Self-Service Portal, you will create two *Key Performance Indicator (KPI)* widgets based on the *All Cases* generic inquiry.

You will create the *Case Volume* widget and change the parameters of new widgets. To add *KPI* widgets to the dashboard, do the following:

1. While you are still viewing the *Case Activities* dashboard, on the dashboard title bar, click the **Design** button to switch to design mode.
2. Point at the *Case Volume* widget and on the widget title bar, click the Clipboard button to copy the settings of the widget.
3. In the widget placeholder in any part of the screen, click *Paste from clipboard*. The system inserts the copied widget.
4. On the title bar of the created widget, click the Edit button. The **Widget Properties** dialog box opens.
5. Click the **Filter Settings** button.
6. In the **Filter Settings** dialog box, which opens, do the following:
   a. On the table toolbar, click **Add Row**.
   b. In the **Data Field** column of the added row, select *Status*.
   c. In the **Conditions** column leave the default value: *Equals*.
   d. In the **Value 1** column, select *New*.
   e. On the table toolbar, click **Add Row**.
   f. In the **Data Field** column of the added row, select *Reason*.
   g. In the **Conditions** column leave the default value: *Equals*.
   h. In the **Value 1** column, select *Unassigned*.
   j. Click **OK** to save your changes.
7. In the **Normal Level** box, specify `2`.
8. In the **Visualization Type** box, select *Scorecard*.
9. In the **Icon** box, select *access time*.
10. In the **Caption** box, type `unassigned cases`.
11. Click **Finish** to save your changes and close the dialog box.

    The widget is added to the dashboard.
12. Point at the *Unassigned Cases* widget and on the widget title bar, click the Clipboard button to copy the settings of the widget.
13. In the widget placeholder in any part of the screen, click *Paste from clipboard*. The system inserts the copied widget to the dashboard.
14. On the title bar of the created widget, click the Edit button. The **Widget Properties** dialog box opens.
15. Click the **Filter Settings** button.
16. In the **Filter Settings** dialog box, which opens, do the following:
    a. In the row with *Reason*, change **Value 1** column, select *Assigned*.
    b. Click **OK** to save your changes.
17. In the **Icon** box, select *arrow drop down circle*.
18. In the **Caption** box, type `assigned cases`.
19. Click **Finish** to save your changes and close the dialog box.

    The widget is added to the dashboard.
20. On the dashboard title bar, click the **Design** button to switch to view mode.

You can see the dashboard with the *KPI* widgets in the following screenshot.

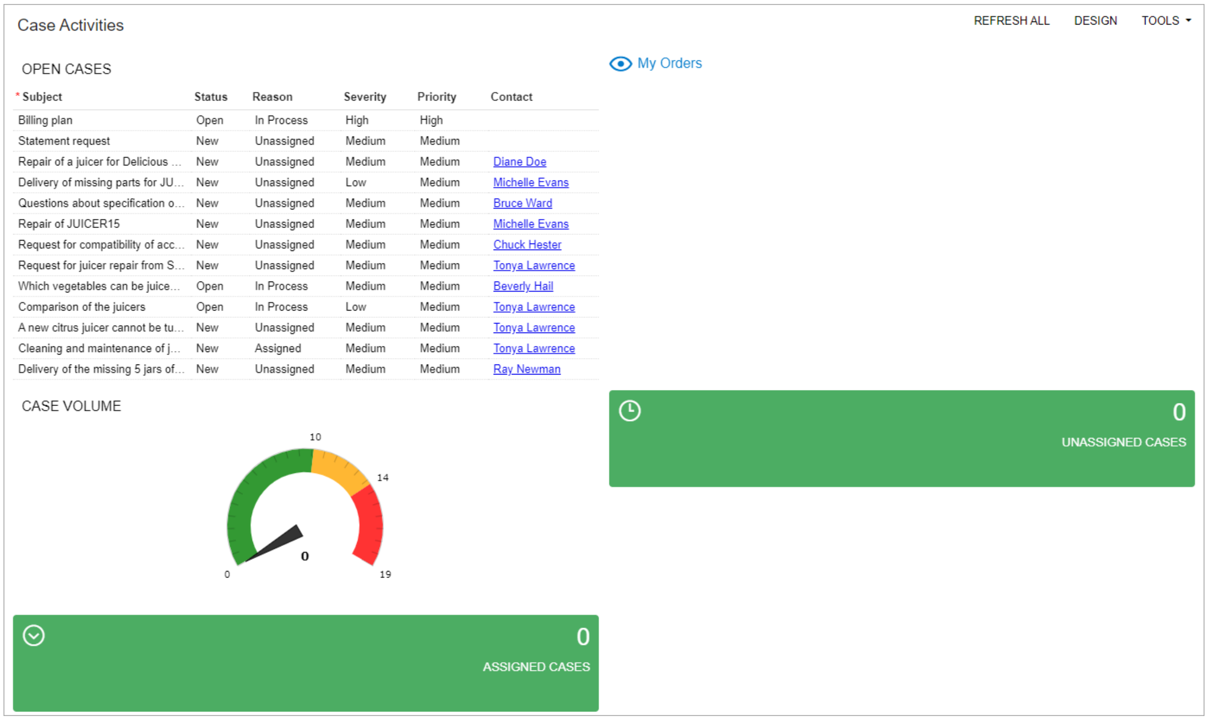


Figure: The Case Activities dashboard with the KPI widgets

Step 7: Selecting a Template for the Dashboard Layout

Suppose that you want to arrange the widgets on the dashboard so that the left column takes two-thirds of the width of the working area. With this layout, the *Open Cases* widget on the dashboard will be larger and easier to see and the *My Orders* widget will be smaller. Further suppose that you want to place the *Unassigned Cases* and *Assigned Cases* widgets above the *Open Cases* widget and the *Case Volume* widget under the *My Orders* widget.

To select a dashboard layout template, do the following:

1. While you are still viewing the *Case Activities* dashboard in view mode, click the **Design** button on the dashboard title bar to switch to design mode.
2. On the dashboard title bar, click the **Edit Layout** button.
3. In the **Dashboard Layouts** dialog box, which opens, do the following:
   a. Select the layout template that has a wide left column (two-thirds of the working area) and a narrow right column (one-third of the working area).
   b. Click **OK**. The dialog box is closed, and the dashboard widgets are arranged within the selected layout.
4. Drag the *My Orders* widget to the right.
5. Drag the right border of the *Open Cases* widget to the right so that the widget takes two-thirds of the working area.

   > If the content of each widget's column is not fully displayed, you can drag the right border of the needed column.

6. Make your dashboard look similar to the dashboard in the screenshot below. Rearrange the widgets on the dashboard as follows:
   a. *Open Cases* under *Unassigned Cases* and *Assigned Cases*
   b. *Case Volume* under *My Orders*

> You can drag and drop all the widgets on the dashboard as you need. Widgets are resizable, and you can change their size as well by dragging a widget by its corner.

7. On the dashboard title bar, click the **Design** button to switch to view mode.

   You can see the dashboard with the new layout in the following screenshot.

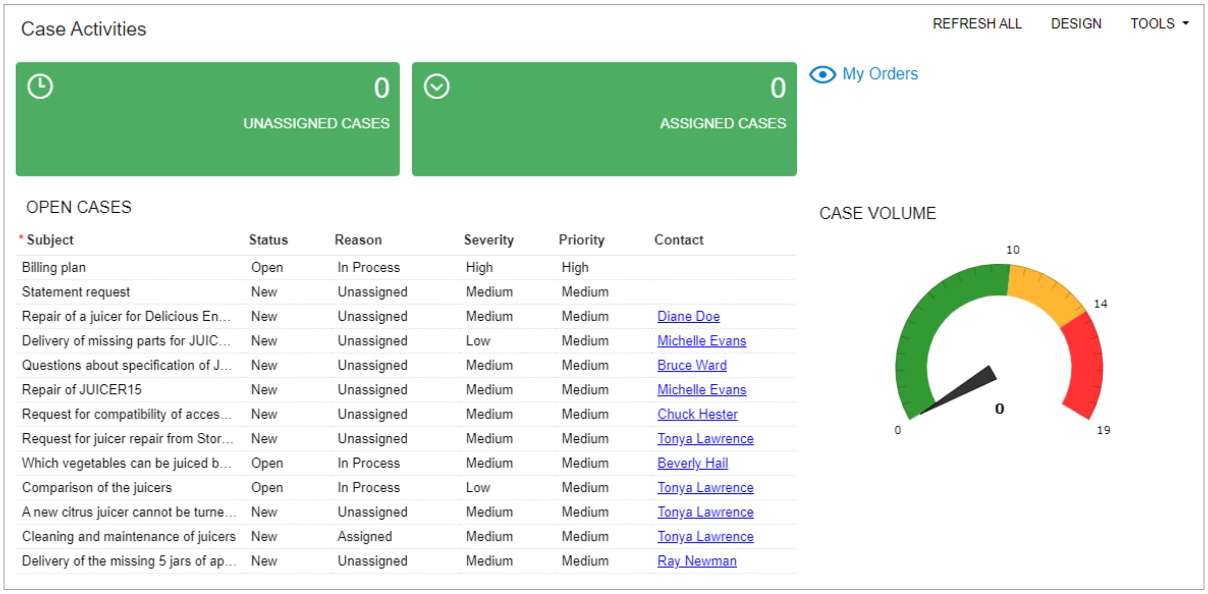


Figure: The new layout of the Case Activities dashboard

8. Sign out of the Self-Service Portal.

Step 8: Verifying That the Dashboard Has Been Correctly Configured

To make sure that portal users can use the newly created *Case Activities* dashboard in the Self-Service Portal and that it has been configured correctly, do the following:

1. Sign in to the Self-Service Portal as the customer's contact Tonya Lawrence by using the *tonya@storehut.example.com* username and the *123* password.
2. On the main menu panel, click **Support** to open the **Support** workspace.
3. In the **Dashboards** category, click *Case Activities* to open the dashboard.
4. Make sure that the *Open Cases* and *My Orders* widgets, which you have added to the dashboard in the previous steps, are correctly displayed on the dashboard, as shown in the following screenshot.

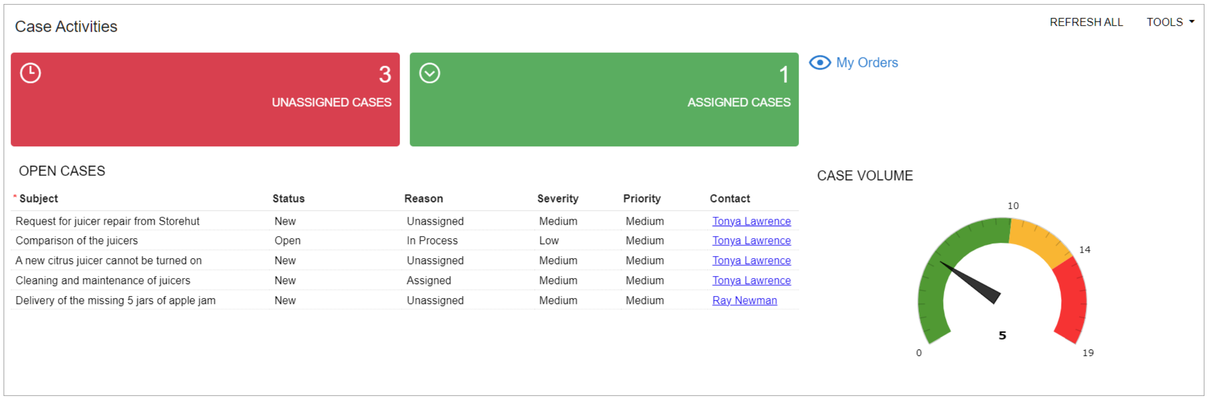


Figure: The Case Activities dashboard (viewed by a portal user)

5. Sign out of the Self-Service Portal.

Tailoring the Self-Service Portal: Creation and Modification of Workspaces

You arrange and configure workspaces in Menu Editing mode, which can be switched on for the main menu panel and workspaces. To switch to this mode, on the main menu panel, you click **Open Configuration Menu > Edit Menu**.

You can manage workspaces as follows:

- Add workspace menu items to the main menu panel and remove menu items from the main menu panel.
- Reorder the list of the workspace menu items on the main menu panel by dragging them.
- Delete a predefined workspace: If you delete a workspace, the system deletes the tiles and the links to forms, reports, and dashboards that were added to the workspace. You can add links to these forms, reports, and dashboards to other workspaces, if needed.
- Add a custom workspace. If your customer's organization needs to have access to specific forms, reports, and dashboards in a particular workspace, you can create a workspace and add a menu item for it to the main menu panel.

You can modify a workspace as follows:

- Rename a predefined workspace.
- Add new tiles and links to forms, reports, and dashboards.
- Delete the predefined tiles and links to forms, reports, and dashboards.
- Reorder tiles.
- Reorder categories.
- Regroup links to forms, reports, and dashboards: You can reorder the links in a category, move a link to a different category, or create a new category that fits your customer's business needs and add links to this category.

If you have modified a workspace and want to cancel all your changes, you can restore the default main menu panel and all workspaces. Changes in the following menu elements will be canceled:

- The list of workspaces that are items on the main menu panel and on the **More Items** menu
- Items in each workspace, such as tiles, and links to forms, reports, and dashboards
- Items in the quick menu of each workspace for all users of the system (which is a view of the workspace with a smaller number of frequently accessed links)
- Workspaces pinned to the main menu panel and unpinned from the main menu panel for all users of the system

Tailoring the Self-Service Portal: To Configure a Workspace

In the following implementation activity, you will configure a workspace in the Acumatica Self-Service Portal.

Story

Suppose that you are Kimberly Gibbs, system administrator who also manages workspaces, at the SweetLife Fruits & Jams company. Your colleague David Chubb has received a request from a customer, the Storehut chain of supermarkets in New York, about the customization of SweetLife's Self-Service Portal.

You need to create a workspace for Storehut's purchase managers in SweetLife's Self-Service Portal to give the managers the ability to monitor detailed information about their orders.

Configuration Overview

For the purposes of this activity, the following tasks have been performed:

- The Acumatica ERP application instance with the *U100_SSP_Admin_2025 R1* dataset preloaded and the Self-Service Portal application instance have been deployed in the same database.

  > This deployment is outside of the scope of this training.

- In the *U100_SSP_Admin_2025 R1* dataset, on the *User Roles* (SM201005) form of Acumatica ERP, the *Portal Admin* role has been assigned to the *gibbs* user account. The user account is associated with Kimberly Gibbs, the system administrator in the SweetLife Fruits & Jams company. The role provides full administrative privileges in the Self-Service Portal.

Process Overview

In this activity, you will do the following:

1. Create the **Order Management** workspace
2. Rename the workspace
3. Rearrange menu items on the main menu panel
4. Add form links to the workspace
5. Add a tile to the workspace
6. Create a new category in the workspace
7. Add links to the new category
8. Rearrange links in the workspace category
9. Delete a link from the workspace
10. Verify that the workspace has been correctly configured
11. Delete the workspace

System Preparation

Before you start configuring a workspace in the Self-Service Portal, do the following:

1. Launch the Acumatica ERP website with the *U100_SSP_Admin_2025 R1* dataset preloaded.

2. Sign in to the system as system administrator Kimberly Gibbs by using the *gibbs* username and the *123* password.
3. On the *Enable/Disable Features* (CS10000) form, make sure that the following features have been enabled:
   - *Customer Portal*
   - *B2B Ordering*
   - *Case Management on Portal*
   - *Financials on Portal*
4. Make sure that you have performed the following prerequisite activities:
   a. *Configuring the Self-Service Portal: To License the Self-Service Portal Instance*
   b. *Configuring the Self-Service Portal: To Specify the General Settings of the Self-Service Portal*
   c. *Managing Access to the Self-Service Portal: To Create User Roles for a Customer's Employees*
   d. *Managing Access to the Self-Service Portal: To Create User Types for User Accounts*
   e. *Managing Access to the Self-Service Portal: To Create User Accounts for Contacts*
   f. *Configuring Case Management in the Self-Service Portal: Implementation Activity*
   g. *Tailoring the Self-Service Portal: To Create a Generic Inquiry*
   h. *Tailoring the Self-Service Portal: To Create and Design a Dashboard*
5. Launch the Self-Service Portal website with the *U100_SSP_Admin_2025 R1* dataset preloaded.
6. Sign in to the system as system administrator by using the *gibbs* username and the *123* password.

Step 1: Creating a Workspace

To create a workspace, do the following:

1. In the Self-Service Portal, switch to Menu Editing mode as follows:
   a. On the main menu panel (in the lower left corner of the screen), click the **Open Configuration Menu** (···) button.
   b. Click **Edit Menu**.
2. On the top toolbar (in the upper left corner of the screen), click **Add Workspace**.
3. In the **Workspace Parameters** dialog box, which opens, specify the following settings:
   a. In the **Icon** box, select *powerbi*; this icon will be displayed in the title of the workspace.

      You can begin typing the name of the icon into the box to quickly find the icon.

   b. In the **Area** box, select *Operations*. This is the functional area for which the workspace will be displayed.
   c. In the **Title** box, type `Order Management`.
   d. Click **OK** to save your changes and close the dialog box.

   The empty **Order Management** workspace has been created. In Menu Editing mode, you can see the title of the newly created workspace on the main menu panel.

   An empty workspace that does not have any links to the forms, reports, or dashboards, is not displayed on the main menu panel in view mode.

4. In the lower left corner of the screen, click **Exit Menu Editing** to save your changes and stop working in Menu Editing mode.

Step 2: Renaming the Workspace

Suppose that the customer has requested to rename the **Order Management** workspace to **Order Manager**.

To rename the workspace, do the following:

1. Switch to Menu Editing mode.
2. On the main menu panel, point at the **Order Management** workspace title.
3. Click **Edit Workspace Parameters** (the Edit button right of the workspace title).
4. In the **Workspace Parameters** dialog box, which opens, do the following:
   a. In the **Title** box, type `Order Manager`.

   > You can change the icon and area of a workspace by selecting a new value in the corresponding box.

   b. Click **OK** to save your changes. The dialog box is closed. The workspace has been renamed.

Step 3: Rearranging Workspace Menu Items on the Main Menu Panel

To place the **Order Manager** menu item before the **Orders** menu item, do the following:

1. While you are still in Menu Editing mode, on the main menu panel, drag the **Order Manager** menu item before the **Orders** menu item.
2. In the lower left corner of the screen, click **Exit Menu Editing** to save your changes.

Step 4: Adding Links to the Workspace

To add links to the **Order Manager** workspace, do the following:

1. Switch to Menu Editing mode.
2. On the main menu panel, click the **Order Manager** title of the workspace.
3. On the top toolbar, click **Add Menu Item**.
4. In the **Select Forms** dialog box, which opens, select the check boxes left of the following form and dashboard names to add the links to the workspace:

   > You can begin typing the name into the Search box to quickly find the form.

   - Case Activities
   - Catalog
   - Company Profile
   - Contract
   - Contact
   - My Documents
   - User Profile
5. Click **Add & Close** to save your changes and close the dialog box.
6. In the upper right corner of the workspace title bar, click the **Pin to Main Menu Panel** () button to add the new workspace to the main menu panel.

7. In the lower left corner of the screen, click **Exit Menu Editing** to save your changes.

   Notice that the **Order Manager** workspace is now displayed on the main menu panel. The links to the forms that you have added are grouped in categories. You can move any link to a different category, which you will be doing further in this activity.

Step 5: Adding a Tile to the Workspace

Suppose that you need to add the **My Orders** tile to the **Order Manager** workspace. This tile opens the My Orders (SP700003) form.

To add the **My Orders** tile to the workspace, do the following:

1. Switch to Menu Editing mode.
2. On the main menu panel, click the **Order Manager** title to open the workspace.
3. On the top toolbar, click **Add Tile**.
4. In the **Tile Parameters** dialog box, which opens, do the following:
   a. In the **Icon** box, select the *visibility* icon that will be displayed in the tile.
   b. In the **Title** box, type `My Orders`.
   c. In the **Form** box, select *SP700003 - My Orders* (the form that opens if a user clicks the tile).

      You can begin typing the name of the form into the box to quickly find the form.

   d. Click **OK** to save your changes and close the dialog box.

      The tile is added to the workspace.
5. In the lower left corner of the screen, click **Exit Menu Editing** to save your changes.

You can see the **Order Manager** workspace in the following screenshot.

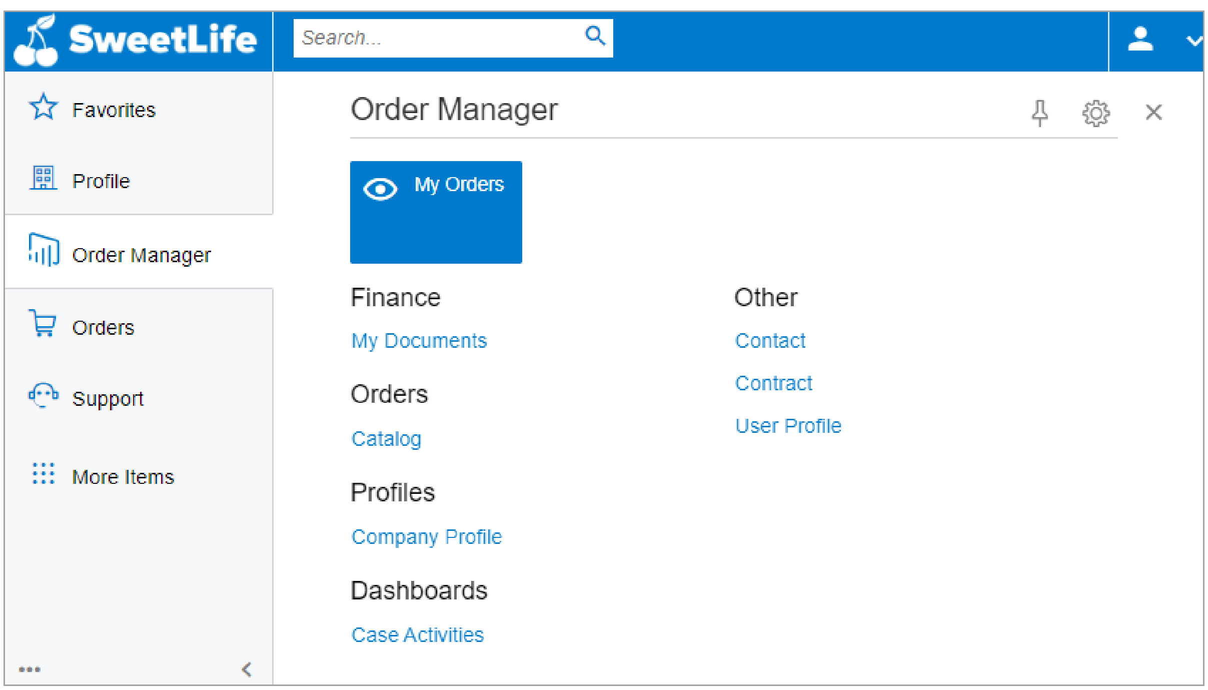


Figure: The Order Manager workspace

You have configured a workspace. Notice that the links to the forms and the dashboard are grouped into the predefined categories. You can create new categories and add links to these categories, which you will be doing in the following steps.

Step 6: Creating a Category in the Workspace

In a workspace, forms, reports, and dashboards are grouped into categories, to make it easier for users to find the needed links. You can create categories, add the links (to forms, reports, and dashboards) to these categories, and move the links to different categories.

In this step, you will create the **Contacts** category in the Self-Service Portal.

To create the category, do the following:

1. Switch to Menu Editing mode.
2. Add the **Contacts** category to the workspace as follows:
   a. On the top toolbar (in the upper right corner of the screen), click **Menu Settings** to open the Categories menu.
   b. On the menu title bar, click **Add Category**.
   c. In the **Category Parameters** dialog box, which opens, do the following:
      a. In the **Title** box, type `Contacts`.
      b. Click **OK** to save your changes. The dialog box is closed.

      Any category you add is available for all workspaces. If you delete a category on the Categories menu, the category will be deleted from all workspaces where it has been added.

   d. In the upper right corner of the screen, click **Menu Settings** to close Menu Editing mode.

Step 7: Adding Links to the Workspace Category

In this step, you will add the *Contact*, *User Profile*, and *Company Profile* links to the **Contacts** category, which you have created in the previous step.

To add the links to the **Contacts** category in the Self-Service Portal, do the following:

1. While you are still in Menu Editing mode, select the **Order Manager** workspace.
2. Point at the *Contact* link and click the **Edit Link Parameters** button.
3. In the **Item Parameters** dialog box, which opens, do the following:
   a. In the **Category** box, select *Contacts*.
   b. Click **OK** to save your changes. The dialog box is closed.

      The *Contact* link has been added to the **Contacts** category.

      If you have multiple links in a category, you can rearrange the links within the category by dragging them.

4. Drag the *User Profile* link to the **Contacts** category.
5. Drag the *Company Profile* link to the **Contacts** category.
6. In the lower left corner of the screen, click **Exit Menu Editing** to save your changes. The **Order Manager** workspace opens in the view mode.

The *Contact*, *User Profile*, and *Company Profile* links are now displayed under the **Contacts** category. Notice that the **Profiles** category is no longer displayed in the workspace because no other links from this category remain in the workspace.

Step 8: Rearranging Links in the Workspace Category

Suppose that you need to arrange the links in the **Contacts** category to be displayed in alphabetical order.

To rearrange the links in the category, do the following:

1. Switch to Menu Editing mode.
2. Drag the *Company Profile* link before the *Contact* link.

Step 9: Deleting a Link from the Workspace

Suppose that your customer no longer needs the *Contract* link in the **Order Manager** workspace.

To delete the link from the workspace in the Self-Service Portal, do the following:

1. While you are still in Menu Editing mode, in the **Other** category, point at the *Contract* link.
2. Click **Delete Link**.
3. In the dialog box that opens, click **OK** to delete the *Contract* link. The dialog box is closed; the link has been deleted. Notice that the **Other** category is no longer displayed in the workspace because no other links from this category remain in the workspace.
4. In the lower left corner of the screen, click **Exit Menu Editing** to save your changes.

   You can see the **Order Manager** workspace in the following screenshot.

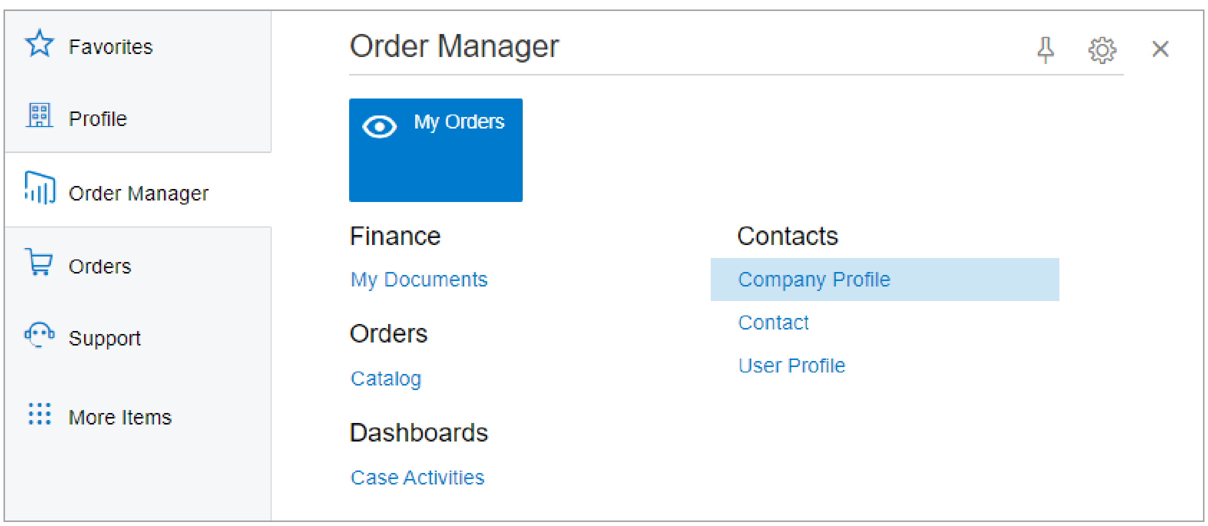


   Figure: The Order Manager workspace with the new category and rearranged links

5. Sign out of the Self-Service Portal.

Step 10: Verifying That the Workspace Has Been Correctly Configured

To make sure that customers can use the newly created **Order Manager** workspace, do the following:

1. Sign in to the Self-Service Portal as customer Tonya Lawrence by using the *tonya@storehut.example.com* username and the *123* password.

2. On the main menu panel, click **Order Manager** to open the **Order Manager** workspace.
3. Make sure that the workspace items that you have added in the previous steps are displayed in the workspace.
4. In the **Dashboards** category, click *Case Activities* to view the dashboard.
5. Sign out of the Self-Service Portal.

Step 11: Deleting the Workspace

Suppose that the customer no longer needs the **Order Manager** workspace. To delete the workspace, do the following:

1. Sign in to the Self-Service Portal as system administrator Kimberly Gibbs by using the *gibbs* username and the *123* password.
2. Switch to Menu Editing mode.
3. On the main menu panel, point at the **Order Manager** workspace title.
4. Click **Delete Workspace**.

> If you delete a workspace, its tiles and links to forms, reports, and dashboards are deleted. However, all included forms, reports, and dashboards remain in the system. The categories that you have created also remain the system; you can delete them by using the Categories menu.

5. In the dialog box that opens, click **OK** to delete the workspace. The system closes the dialog box and deletes the workspace.