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General Hardware and Software Requirements

You are required to bring a laptop to the training class to be able to perform exercises.

You should install Acumatica ERP on the Windows environment. If you have Mac OS, you can install and use any virtualization application that supports Windows OS. For instance, Parallels Desktop.

Acumatica ERP requires the use of the local SQL Server. If you do not have the installed server, you can download Microsoft SQL Server Express from here and install it.

If you use Windows versions up to Windows Vista, you can install SQL Server Express 2012.

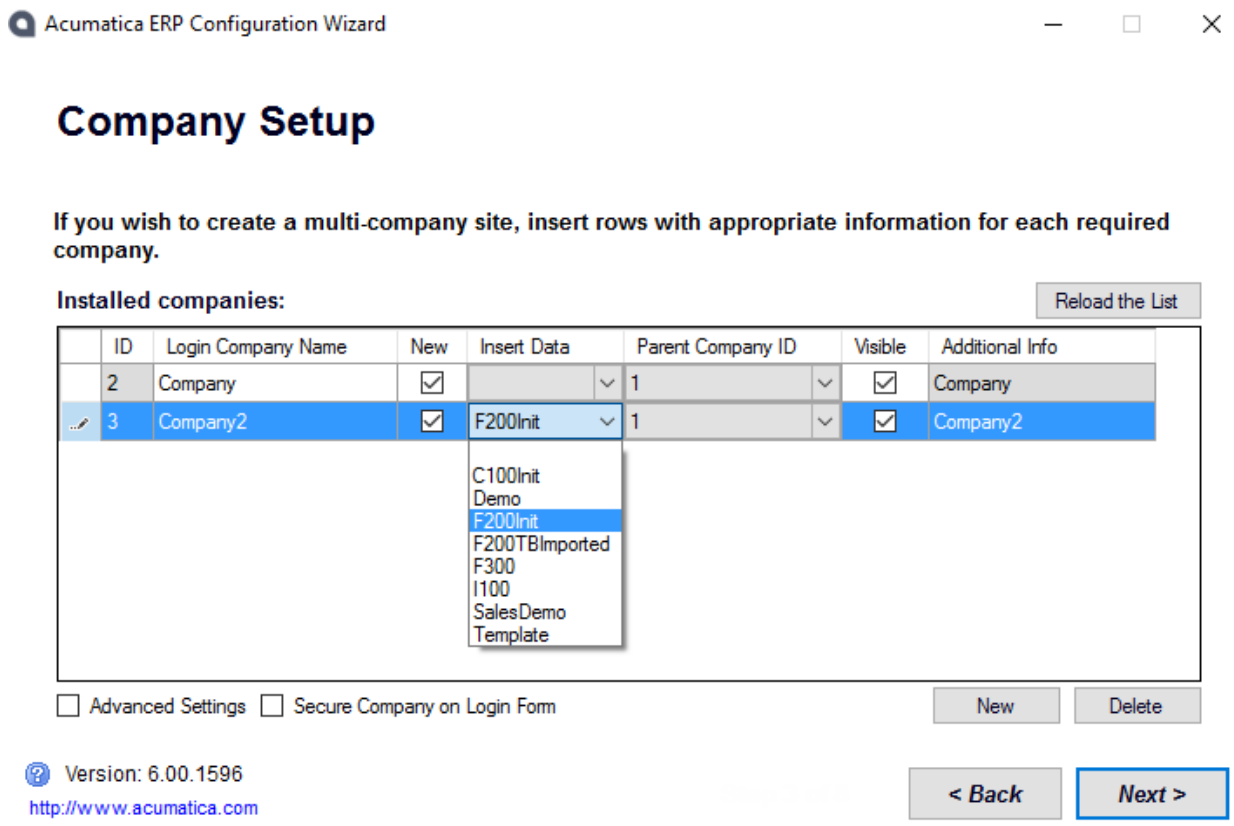
Please contact Acumatica Education at training@acumatica.com in case you have any questions.

Financial Intermediate and ARM Reports

Prior to coming to the Financial Intermediate and ARM Reports class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1596). If you have **Acumatica ERP 6.00.1596** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP. In the new instance, create two companies for your training with the following data preloaded (see the screenshot below):
   1. (no value) - an out-of-the box company
   2. *F200Init* - a company with the *F200Init* data preloaded



Click **Next**, and on the **Confirm Configuration** page, click **Finish**.

The system will add new companies to the Acumatica ERP instance and preload the selected data. The first login is *admin* and the password is *setup*. When you log in, you will be asked to change the password as needed.

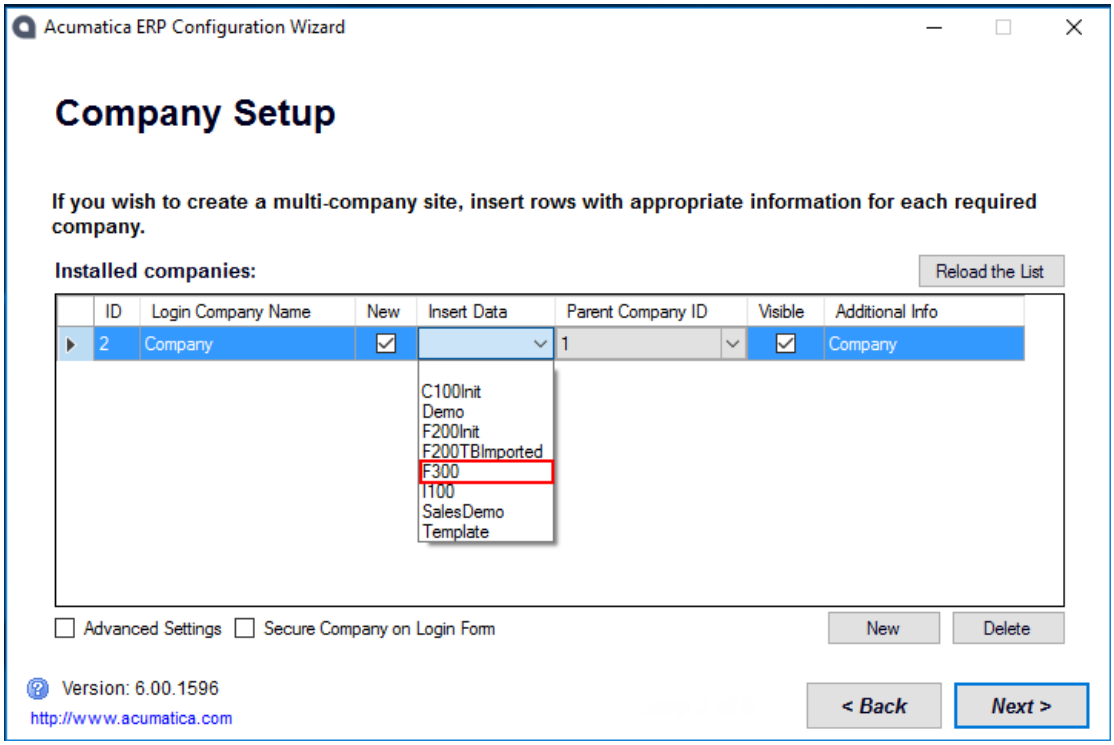
5. Prepare the files (training materials) for use in the class.
6. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

Distribution Basics

Prior to coming to the Distribution Basics class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1596). If you have **Acumatica ERP 6.00.1596** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP. In the new instance, create a company for your training with the *F300* data preloaded (see the screenshot below).



Click **Next**, and then, on the Confirm Configuration page, click **Finish**.

The system will add a new company to the Acumatica ERP instance and preload the selected data. Use *admin: setup* as initial credentials to sign in to the new company; then you will be asked to change the password.

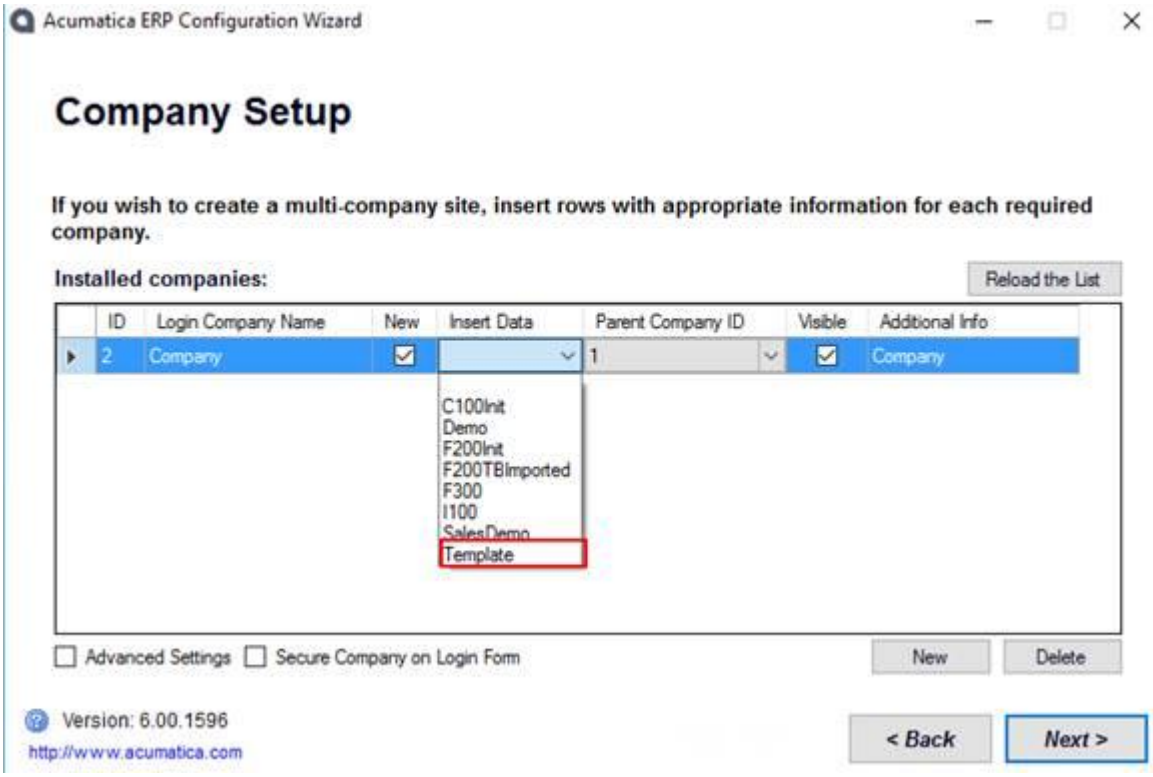
5. Prepare the files (training materials) and bring your PC for use in the class.
6. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

Project Accounting

Prior to coming to the Project Accounting class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1596). If you have **Acumatica ERP 6.00.1596** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP with the *Template* data preloaded.



Click **Next**, and on the **Confirm Configuration** page, click **Finish**.

The system will add new companies to the Acumatica ERP instance and preload the selected data. The first login is *admin* and the password is *setup*. When you log in, you will be asked to change the password as needed.

5. Prepare the files (training materials) for use in the class.
6. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

Web Services and Overview of Mobile Framework

Prior to coming to the Web Services and Overview of Mobile Framework class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. You need a computer that meets the following minimum hardware and software requirements:
    - RAM: 4 GB or more
    - Free hard disk space: 60 GB or more
    - **Oracle VM VirtualBox** 5.1.12 or higher is installed
2. Download and import the Web_Services_Mobile_Framework.ova image file of the virtual machine (~18 GB).
3. Prepare the files (training materials) for use in the class.

You are ready. Do not start doing the exercises by the guides. You will be using the guide with the instructor in the class.

Customization Platform

Prior to coming to the Customization Platform class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. You need a computer that meets the following minimum hardware and software requirements:
    - RAM: 4 GB or more
    - Free hard disk space: 60 GB or more
    - **Oracle VM VirtualBox** 5.1.12 or higher is installed
2. Download and import the Customization_Platform_Training.ova image file of the virtual machine (~18 GB).
3. Prepare the files (training materials) for use in the class.

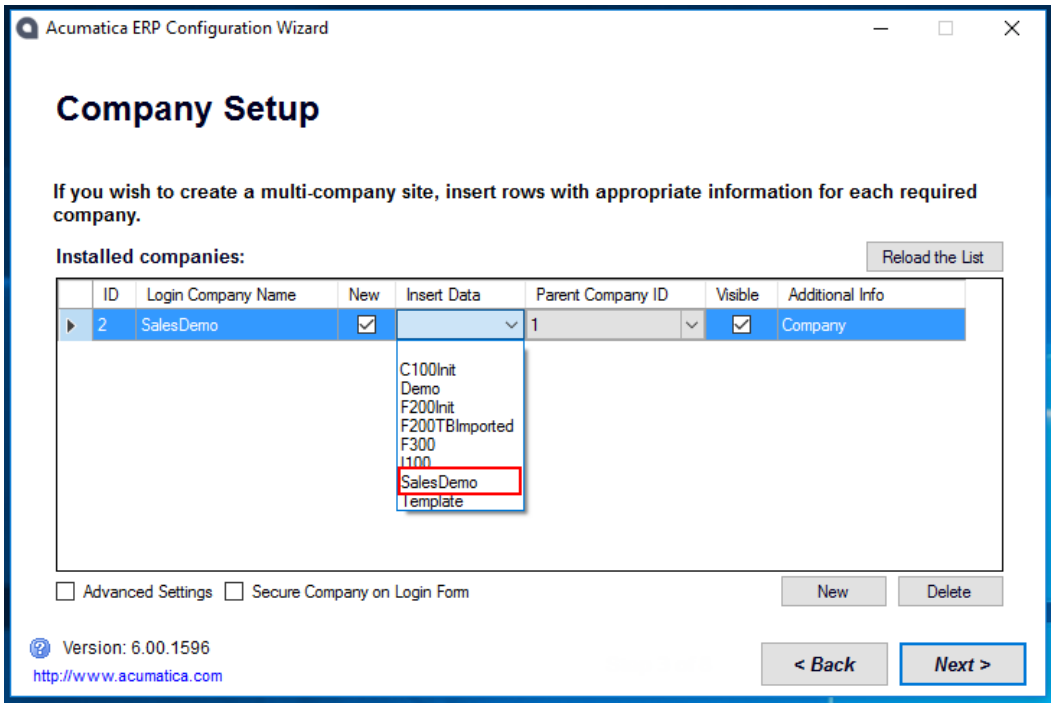
You are ready. Do not start doing the exercises by the guides. You will be using the guide with the instructor in the class.

Financial Reports, Data Query, and Data Analysis for End-Users

Prior to coming to the Financial Reports, Data Query, and Data Analysis for End-Users class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1596). If you have **Acumatica ERP 6.00.1596** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP. On the **Company Setup** page:
   I. Specify the following parameters (see the screenshot below).
      - **Login Company Name**: SalesDemo
      - **Insert Data**: SalesDemo
      - **Parent Company ID**: 1
      - **Visible**: Selected



   II. Click **Next**.

III. On the **Database Connection** page, specify the credentials for connecting to the database, and click **Next**.
IV. On the **Instance Configuration** page, specify **Instance Name** as InstanceName, and click **Next**
V. On the **Web Site Configuration** page, do the following:
    - Select a website.
    - Select the **Create Virtual Directory** check box.
    - Specify the application pool.
VI. Click **Next**, and on the **Confirm Configuration** page, click **Finish**.

The system will create a new Acumatica ERP instance, add a new company, and load the selected data.

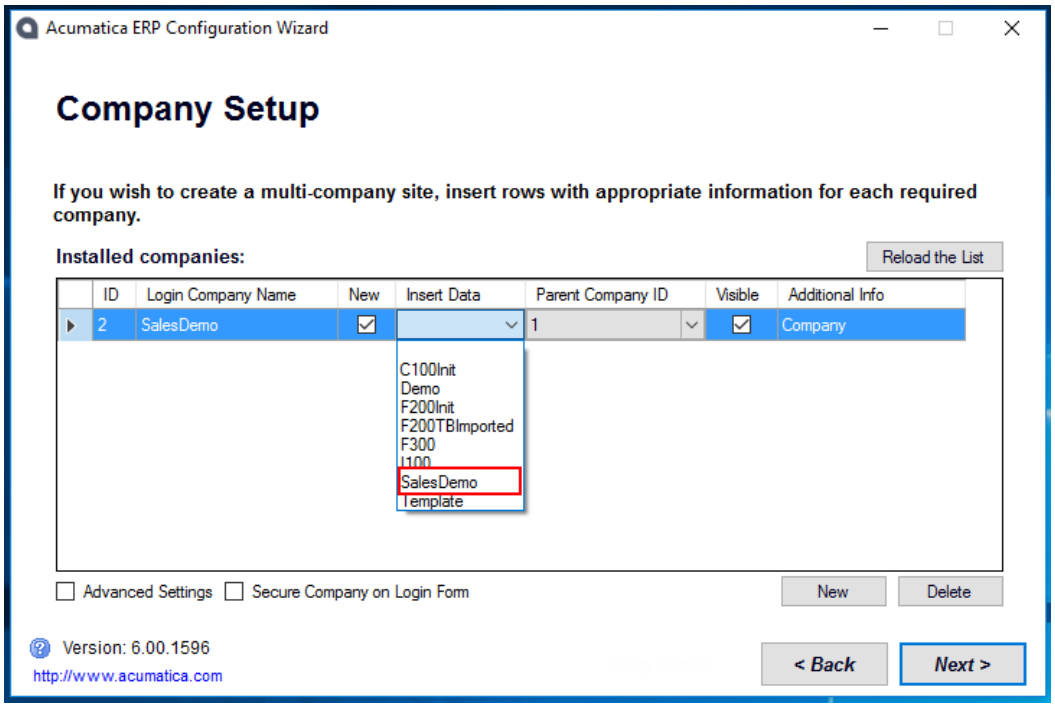
5. You are ready.

Writing Reports and Integration Scenarios

Prior to coming to the Writing Reports and Integration Scenarios class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1596). If you have **Acumatica ERP 6.00.1596** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP. On the **Company Setup** page:
   I. Specify the following parameters (see the screenshot below).
      - **Login Company Name**: SalesDemo
      - **Insert Data**: SalesDemo
      - **Parent Company ID**: 1
      - **Visible**: Selected



   II. Click **Next**.

III. On the **Database Connection** page, specify the credentials for connecting to the database, and click **Next**.
IV. On the **Instance Configuration** page, specify **Instance Name** as InstanceName, and click **Next**
V. On the **Web Site Configuration** page, do the following:
   - Select a website.
   - Select the **Create Virtual Directory** check box.
   - Specify the application pool.
VI. Click **Next**, and on the **Confirm Configuration** page, click **Finish**.

The system will create a new Acumatica ERP instance, add a new company, and load the selected data.

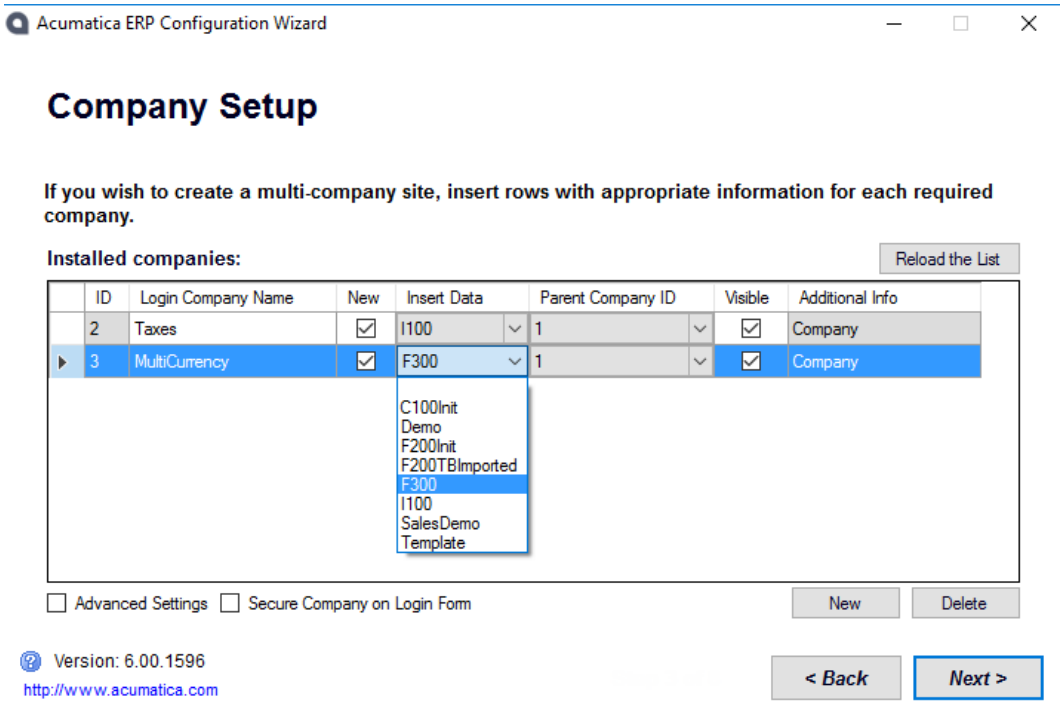
5. Prepare and bring the files for use in the class (training materials).
6. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

Financials Advanced: Taxes and Multi-Currency Accounting

Prior to coming to the Financials Advanced: Taxes and Multi-Currency Accounting class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1596). If you have **Acumatica ERP 6.00.1596** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP. In the new instance, create two companies for your training with the following data preloaded (see the screenshot below):
   1. a company with the *I100* data
   2. a company with the *F300* data



Click **Next**, and then, on the Confirm Configuration page, click **Finish**.

The system will add new companies to the Acumatica ERP instance and preload the selected data. Use *admin: setup* as initial credentials to sign in to the new company; then you will be asked to change the password.

5. Prepare the files (training materials) for use in the class.
6. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

Acumatica Framework Fundamentals

Prior to coming to the Acumatica Framework Fundamentals class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. You need a computer that meets the following minimum hardware and software requirements:

    - RAM: 4 GB or more
    - Free hard disk space: 60 GB or more
    - **Oracle VM VirtualBox** 5.1.12 or higher is installed

2. Download and import the Acumatica_Framework_Fundamentals_Training.ova image file of the virtual machine (~18 GB).
3. Prepare the files (training materials) for use in the class.

You are ready. Do not start doing the exercises by the guides. You will be using the guide with the instructor in the class.

System Administration

Prior to coming to the System Administration class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please make sure that you have a laptop meeting the requirements below with operating system and database server installed:

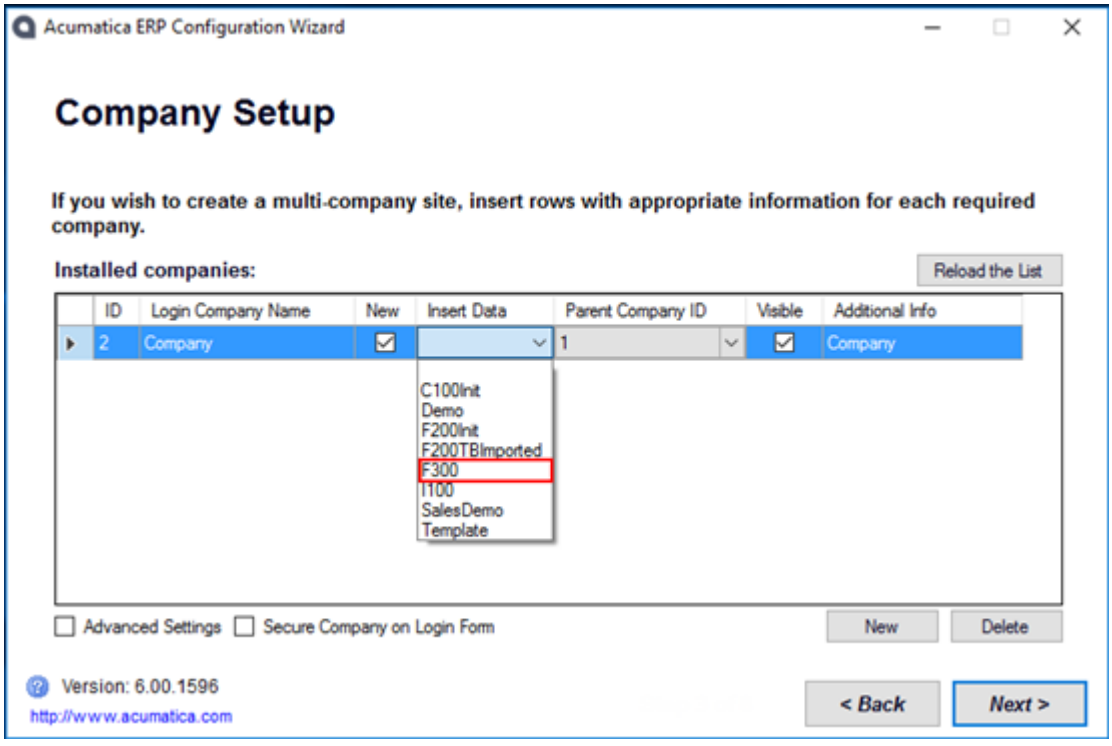
1. Your laptop must meet the minimum hardware and software requirements below:
   I. Hardware requirements:
      - 64-bit CPU: Dual or Quad-core CPU
      - RAM: 4GB or more
      - Hard disk space: minimum 25GB free
   II. Software requirements:
      - Windows 10 system with IIS. (Earlier Windows operating system with IIS 7.0 or later will also work)
      - SQL Server 2012 Express Edition (http://www.microsoft.com/en-us/download/details.aspx?id=29062) Note: Acumatica can be installed on SQL Server 2005/2008/2008 R2/2012 any edition
      - .NET framework version 4.5.1 or later
      - Acumatica ERP 6.0 (version 6.00.1596)
2. You must ensure IIS is working on your system using http://localhost with IIS Manager installed. Following IIS features must be turned on:
   - Web Management Tools > IIS Management Console
   - World Wide Web Services > Application Development Features > .NET Extensibility
   - World Wide Web Services > Application Development Features > ASP.NET
   - World Wide Web Services > Application Development Features > ISAPI Extensions
   - World Wide Web Services > Application Development Features > ISAPI Filters
   - World Wide Web Services > Common HTTP Features > Default Document
   - World Wide Web Services > Common HTTP Features > Static Content
   - World Wide Web Services > Performance Features > Dynamic Content Compression
   - World Wide Web Services > Performance Features > Static Content Compression
   - World Wide Web Services > Security > Request Filtering
3. You must ensure you have SQL Server Management Studio installed and can connect to SQL instance.
4. Prepare the files (training materials) for use in the class
5. After you ensure that all requirements are met, you are ready for the class.

Distribution Intermediate

Prior to coming to the Distribution Intermediate class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1596). If you have **Acumatica ERP 6.00.1596*** installed, skip the steps 1 and 2, and proceed with the step 3.
   * Note that step 4 requires exactly this version of Acumatica ERP.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP. In the new instance, create a company for your training with the *F300* data preloaded (see the screenshot below).



Click **Next**, and then, on the Confirm Configuration page, click **Finish**.

The system will add a new company to the Acumatica ERP instance and preload the selected data.

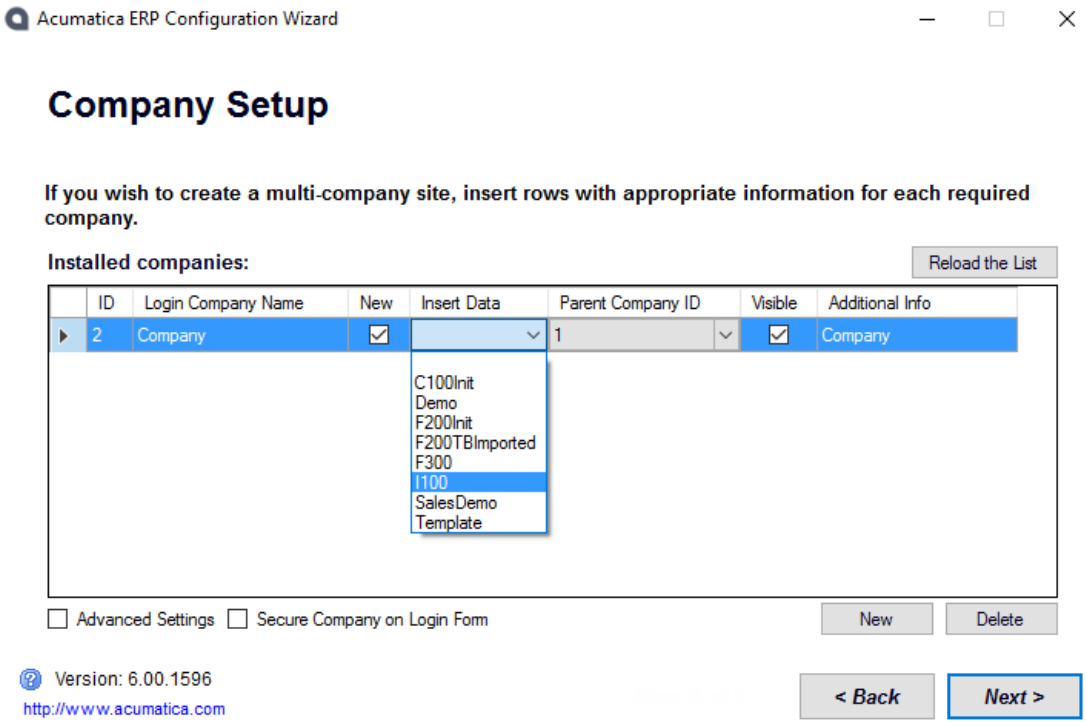
5. Log in to the new company (initial credentials *admin:setup*), and import and restore the D200_Init_Snapshot_6.00.1596.ZIP snapshot into the system. Note that the snapshot is version-specific, and you should have exactly 6.00.1596 version of the Acumatica ERP instance to import the snapshot. For detail instructions on how to import and restore the snapshot, search **Help** for **Managing Snapshots** article in your instance.
6. Prepare the files (training materials) and bring your laptop for use in the class.
7. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

Service Management in Acumatica

Prior to coming to the Field Service: Service Management class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 15 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1686). If you have **Acumatica ERP 6.00.1686** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP with the following settings:
   - On the **Database Server Connection** step of the configuration wizard (step 1), set **Server type** to *Microsoft SQL Server*.
   - On the **Company Setup** step of the configuration wizard (step 3), install a company with the *I100* data preloaded, as shown in the following screenshot.



5. Launch the instance you have created. The first login is *admin* and the password to log in to the new company is *setup*; then change the password to *123*.

6. Download Acumatica Field Services customization (version 1.3.51 for Acumatica 6.00.1686).
7. In the created instance, open the Customization Projects form (SM204505; System > Customization > Manage).
8. On the form toolbar, click **Import > Import New Project** and in the dialog, which opens, select the downloaded ServiceManagement_1_3_51_60.zip project, then click **Upload**.
9. Select the unlabeled check box in the line with the *ServiceManagement135160* project, and on the toolbar, click **Publish > Publish to Multiple Companies**.
10. In the dialog, which opens, do the following and then click **OK**:
    1. Select the company with ID set to *2*.
    2. Select the **Publish with Cleanup - Disable scripts optimization** check box
11. Wait for the customization to validate, then in the **Compilation** dialog click the **Publish** button, when prompted.
12. After the publication has completed, close the **Compilation** dialog and refresh the browser window.
    The Service suite appears in the main menu.
13. Prepare the files (training materials) for use in the class.
14. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

The following steps are not required for the training, but it is recommended to have them completed for the additional demonstration purposes:

1. Download an Android/iPhone emulator, for example this free Android emulator http://www.bluestacks.com/.
2. Install Bluestack or any other emulator.
3. Run the emulator and open the Google Play / App Store.
4. Search and download Acumatica mobile app (version 5.30.190).
    - The iOS application is available on Apple App Store.
    - The Android application is available on the Google Play Store.
5. Download Service Management Mobile App (version 1.3.51).
6. Extract the downloaded archive and copy the following files to the Acumatica ERP instance folder on your PC:

File Name	Origin	Destination
SD400101.xml.inc	Mobile\includes	.\[InstanceRootFolder]\App_Data\Mobile\includes
SD403900.xml.inc	Mobile\includes	.\[InstanceRootFolder]\App_Data\Mobile\includes
SD300200.xml.inc	Mobile\includes\hidden	.\[InstanceRootFolder]\App_Data\Mobile\includes\hidden
SD304000.xml.inc	Mobile\includes\hidden	.\[InstanceRootFolder]\App_Data\Mobile\includes\hidden

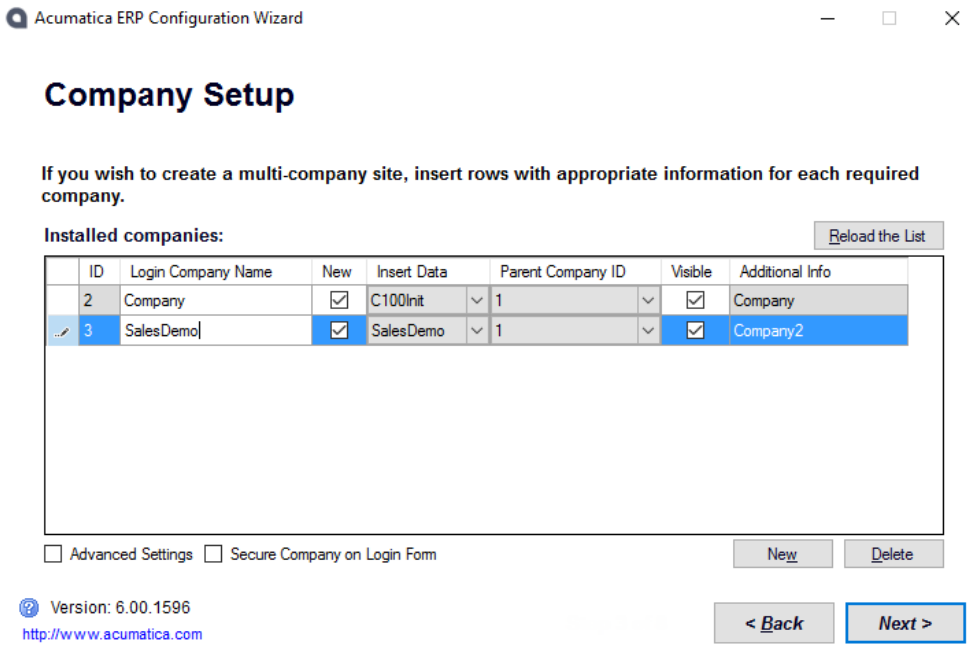
7. Replace the mobilesitemap.xml file at this destination .\[InstanceRootFolder]\App_Data\Mobile with the file with the same name you have downloaded.

CRM

Prior to coming to the Customer Relationship Management class, you should perform some advance preparations on your laptop that is required to bring to the training class.

Please perform the following technical preparation steps, which might take about 10 minutes to complete:

1. Make sure that your computer meets General Hardware and Software Requirements.
2. Download Acumatica ERP 6.0 (version 6.00.1686). If you have **Acumatica ERP 6.00.1686** installed, skip the steps 1 and 2, and proceed with the step 3.
3. Run the downloaded .msi to install the Acumatica ERP Configuration Wizard.
   For the detailed steps on how to install the wizard and deploy the application instance, see **Installing Acumatica ERP** and **Deploying an Acumatica ERP Instance** in the Acumatica ERP Installation Guide.
4. By using the **Acumatica Configuration Wizard**, deploy a new instance of Acumatica ERP with the following settings:
   I. On the **Database Server Connection** step of the configuration wizard (step 1), set **Server type** to *Microsoft SQL Server*.
   II. On the **Company Setup** step of the configuration wizard (step 3), install two companies for your training with the following data preloaded (see the screenshot below):
      1. a company with the *C100Int* data
      2. a company with the *SalesDemo* data



5. Specify the following parameters for the company with *SalesDemo* data preloaded:
   - Login Company Name: SalesDemo
   - Insert Data: SalesDemo
   - Parent Company ID: 1
   - Visible: Selected

   Click **Next**, and on the Confirm Configuration page, click **Finish**.

   The system will add a new company to the Acumatica ERP instance and preload the selected data. The initial login and password to sign in to the new company are *admin* and *setup*, respectively. After you enter this login and password, you will be asked to change the password.
6. As part of the training you need to have a Gmail account already setup (either personal or created for training purposes). You will need the email address and password to access the account.
7. Bring the files to the training class, as they will be used to complete some of the exercises.
8. You are ready. Do not start doing the exercises by the guide. You will be using the guide with the instructor in the class.

Sales Methodology

No preparation is needed for this class.

Pre-Sales Training and Workshop

Please contact Tom Costa (tcosta@acumatica.com) for details.

Commerce/Magento Sales and Integration
Please contact Rahul Gedupudi (rgedupudi@kensium.com) for details.

JAAS Advanced Manufacturing Software (JAMS) for Acumatica
Please contact Merrilee Schlemmer (mschlemmer@jaas.net) for details.