Acumatica Licensing Guide

Contents

Using This Guide

This guide is provided to enhance your understanding of Acumatica licensing for Acumatica's Software as a Service (SaaS) Subscription and Private Cloud Subscription (PCS). Any examples presented in this guide are for illustrative purposes only. Acumatica, Inc. reserves the right to update the existing version of this document without advanced notice.

This guide covers all aspects of Acumatica licensing, and it is important to read it in its entirety. Unless otherwise stated, any reference to "system" or "software" in this document is a reference to the Acumatica Cloud ERP software or SaaS Subscription. Headings or sections that mention "license" or "licensing" may also apply to SaaS Subscriptions, where applicable.

Any capitalized words not defined in this document have the meaning as defined in the respective End-User License Agreement or Subscription Agreement.

Acumatica license keys (activation keys) are used to activate Acumatica products. License entitlements are the features and functionalities included in an acquired license, which differ according to license type.

This guide does not supersede, replace, or modify any of the legal documentation covering use rights for Acumatica products or services. Specific product license terms are located at http://www.acumatica.com/agreements.

Subscription Licensing

Overview

Acumatica's SaaS Subscriptions and Licensing are designed to help small and midsize businesses save money by acquiring only the licensing and services they need. As an organization grows and changes, additional features can be licensed. This makes Acumatica's powerful capabilities more affordable for all businesses.

Acumatica Cloud ERP can be implemented through two models: a SaaS Subscription, which is the most popular choice, and a Private Cloud Subscription (PCS). Certain editions may not be available in all licensing and subscription models.

A SaaS Subscription allows licensees to use Acumatica Cloud ERP for the life of the Subscription as defined in the Subscription Agreement. The SaaS licensing fee includes:

- The price of Acumatica's ERP software.
- The costs Acumatica incurs while maintaining the hardware required to host the software.
- The cost of the internet connectivity Acumatica uses to host the software.
- The costs associated with maintaining Acumatica's protective firewalls and backups.
- All other costs involved in managing the server environment and maintaining SaaS hosting operations.

This model eliminates the fees licensees would incur from buying and maintaining their own hosting infrastructure and gives them the flexibility to increase or decrease their license features as their businesses grow and change. Customers can add features to their licenses at any time, but features can only be removed during the license renewal period. Software Updates and Upgrades, as defined in each Subscription Agreement, are included with SaaS subscriptions. So, each licensee has the option to automatically keep the software and associated infrastructure up to date with the latest enhancements, patches, updates, and upgrades. The SaaS service provides the lowest total cost of ownership and the highest service availability. Visit https://www.acumatica.com/acumatica-saas-faq/ for SaaS FAQs (frequently asked questions).

Private Cloud Subscription (PCS) Licensing allows licensees to use Acumatica Cloud ERP for the life of the Subscription as defined in the Subscription Agreement. With a PCS license, customers may deploy and manage the software on their own premises, through their own physical servers. They may also choose to have their software hosted and/or managed by their VARs (Value Added Resellers) or a third party. This model gives licensees the flexibility to increase or decrease their license features as their businesses grow and change. Customers can add features to their licenses at any time, but features can only be removed during the license renewal period. Software Updates and Upgrades, as defined in each Subscription Agreement, are included with PCS Subscriptions. So, each licensee has the option to automatically keep the software up to date with the latest enhancements, patches, and upgrades.

In addition to choosing a deployment method, Acumatica licensees must also determine which product editions and integrable modules they will implement. This guide will cover additional system and module constraints that are related, but not directly tied, to licensing.

Product Editions

Acumatica Cloud ERP is delivered in the form of Industry Editions, each available in different Edition Sizes and able to be connected to a collection of modules suited for specific industries, company sizes, and organizational needs. The following is an overview of the Acumatica Edition Sizes, Industry Editions, the modules they can contain, and how they are configured to best serve companies of varied sizes.

Industry Specific Editions

Distribution

Acumatica Distribution Edition is ideal for wholesale and distribution organizations that need robust ERP functionality with integrated financials and inventory management capabilities. Appendix A: Edition Datasheets lists all included and optional modules for the Distribution Edition.

Retail

The Acumatica Retail Edition is ideal for online retailers that need integrated ecommerce capabilities, advanced financial and inventory management features, and robust ERP functionality. Appendix A: Edition Datasheets lists all included and optional modules for the Retail Edition.

Manufacturing

Acumatica Manufacturing Edition is ideal for organizations that need to manage manufacturing processes. Appendix A: Edition Datasheets lists all included and optional modules for the Manufacturing Edition.

Construction

Acumatica Construction Edition is ideal for construction organizations, including general contractors, land developers, home builders, and more. Appendix A: Edition Datasheets lists all included and optional modules for the Construction Edition.

General Business

Organizations that do not fit into one of Acumatica's Industry Editions can purchase the General Business Edition. Appendix A: Edition Datasheets lists all included and optional modules for the General Business Edition.

Note: With a SaaS Subscription, additional software is not required to run Acumatica Cloud ERP. However, licenses for additional software, such as Microsoft Windows Server and Microsoft SQL Server, may be required to run Acumatica outside of the Acumatica SaaS environment. These licenses are not included and must be purchased separately.

Company Size

Each Industry Edition can be sized to deliver a set of available modules, default resources, and a default maintenance schedule.

Small Business

All Small Business Editions (SBE) are designed to meet the needs of smaller organizations and include space for five named users. SBE can be upgraded to ten named users (20 named users for the General Business Edition). The included modules vary according to the chosen Industry Edition. See Appendix A for more information on included and optional modules.

All SaaS SBE subscriptions initiated after June 30, 2020, are automatically enrolled in the Acumatica Always Current Program. Customers who need upgrade date options beyond what is included with the standard process may enroll in the Acumatica Flex Program. For more information, they should contact their Acumatica partners.

Advanced

All Advanced Editions are designed for mid-market organizations (10–250 employees) that require advanced financial capabilities and more robust ERP functionality. Included modules vary based on the Industry Edition selected. See Appendix A for more information on included and optional modules.

SaaS Advanced Edition subscriptions initiated after April 1, 2022, are automatically enrolled in the [Acumatica Always Current Program](). Customers who need upgrade date options beyond what is included with the standard process may enroll in the [Acumatica Flex Program](). For more information, they should contact their Acumatica partners.

Enterprise

All Enterprise Editions are designed for larger organizations (250+ employees) that require advanced financial and ERP functionality and capabilities. Included modules vary based on the Industry Edition selected. See [Appendix A]() for more information on included and optional modules.

Module-Specific Licensing

Advanced Expense Management

The Advanced Expense Management module automatically creates expense receipts from images taken with a mobile phone. This feature is only available in the US and Canada, in the English language. The service includes 1,000 transactions per month with the option to purchase additional transactions in packs of 5,000 and 25,000. Other features of this module, like Expense Claim Management, are available worldwide.

Accounts Payable (AP) Document Recognition

AP Document Recognition is only available in the US and Canada, in the English language. The service includes recognition of 50 pages per month. If a customer requires more, they have the option to purchase additional pages.

Business Card Recognition

Business Card Recognition is only available in the US and Canada, in the English language. The service includes recognition of 1,000 cards per month, with the option to purchase additional packs of 5,000 cards. Business Card Recognition will be deprecated in the 2023 R2 release and will no longer be supported after December 31, 2023.

Additional Language Packs

Localization packages may include additional language packs. For example, the Canadian Localization Package includes both English and French Canadian.

Commerce Integration

The Commerce Integration allows a single shopping site to be integrated with the Acumatica Cloud ERP system. Additional licenses are required for connectivity to additional shopping sites or shopping platforms.

Field Service: Scheduled Resources

The Field Service module comes with base licensing for up to 1,000 service appointments per month. Additional licenses are available in 1,000-, 5,000-, and 25,000-appointment packs. There is also the option to switch to Technician-based Licensing, which is calculated according to how many scheduled technicians and vehicles the customer has. For information about technician-based options, licensees should contact their Acumatica partners.

Portals

Acumatica Portals enable licensees to create self-service portal experiences through which customers and business partners can access their information, create orders, or open cases. An Acumatica Portal can be used as a Customer Portal, a B2B Portal, a B2B Ordering Portal, a Case Management Portal, or a Financials Portal. One Acumatica Portal license covers only one company and supports only one Portal URL. Additional individual licenses must be acquired to create Portals for multiple companies and multiple URLs. A Portal license comes equipped with user access, but other modules may be required to activate certain Portal functionalities. To acquire an Acumatica Portal license, customers must already have a valid license for the Acumatica Customer Relationship Management (CRM) module.

SaaS Reserved Resources

SaaS Reserved Resources refers to a set of system resources (e.g., CPU units, memory, storage) that are earmarked for a customer. These resources ensure that a foundational level of system performance is always available to the client. SaaS Reserved Resources are available for customers on specific resource tiers or as a paid add-on option on some editions, designed to optimize system performance even during periods of high demand.

Note: Details on the exact size and type of resources reserved for each customer are not publicly disclosed to ensure both competitive advantage and tailored service optimizations. However, the emphasis is that with SaaS Reserved Resources, customers benefit from a higher degree of independence from other traffic in the shared environment, enhancing the overall reliability and performance.

Processing Node

A Processing Node is a logically separated application unit assigned to manage background operations and web requests. This unit is purposefully designed to execute tasks such as oData pulls, web API requests from external integrations, and scheduled batch processing or operations. By segregating these operations, Processing Nodes allow that the primary Acumatica application unit servicing end user requests remain responsive and free from potential lags caused by intensive background tasks. Acumatica offers Processing Nodes in two distinct sizes: L and X. Depending on the chosen resource tier of your Acumatica license, a Processing Node might be included in the package, or they can be added as an optional purchase. Multiple processing nodes can be purchased allowing high scalability of performance regardless of volume of operations.

Dedicated SaaS

Dedicated SaaS is an implementation designed for the specific needs of one customer. This allows high customer control, including customization and integration with other systems on application and database level. Dedicated SaaS solutions can also be tailored to meet specific compliance needs that require full data encryption at rest, tailored disaster recovery metrics, and specialized security configurations. The solution is scalable, allowing for growth and changes in the number of users and added functionality. The architecture of Dedicated SaaS enables the customer to increase usage without affecting other users on the shared infrastructure.

Sandboxes

An Acumatica Sandbox is a separate web application server and database that can be added to a licensed version of Acumatica. SaaS customers may request a free 90-day Sandbox when they upgrade to their next major version of Acumatica.

As a separate Acumatica instance, Sandboxes may use different software versions and customizations than the main Acumatica Cloud ERP software to which they are linked. This makes Sandboxes useful for development, upgrade testing, load testing, training, and other purposes. Sandboxes can be purchased with a different resource level than their linked Acumatica versions. Sandbox storage is separate from the main Acumatica Cloud ERP database storage and is purchased separately.

SaaS Data Storage

SaaS Subscriptions come with a default amount of data storage space; additional space is available for a fee.

Editions	Small Business	Advanced	Enterprise
Data Storage	50 GB	100 GB	500 GB

Table 4: Included SaaS Data Storage
(For SaaS Subscriptions initially purchased after 4/1/2019)

SaaS customers may utilize external storage and system management for file attachments at their own expense. External storage is not maintained by Acumatica, so standard SLAs, data privacy, and performance related to file attachments are the responsibility of the customer, not Acumatica. Acumatica has no responsibility nor service guarantees for a customer's use of external storage.

Licensing Methods

Acumatica provides its customers with the greatest licensing flexibility in the ERP industry. The various means of licensing are meant to give customers, including those with unique requirements, a tailored and affordable solution. In addition, Acumatica offers licensing models designed to allow PCS customers to deploy high-availability configurations without additional Acumatica costs.

Transaction Tier Consumption Licensing

Most customers license Acumatica Cloud ERP via Consumption-based Transaction Tiers, but customers who purchased the solution prior to April 1, 2018, may use Consumption-based Resource Levels. Information about Consumption-based Resource Level Licensing is available in the Acumatica Licensing Guide Supplement located at http://www.acumatica.com/agreements.

Transaction-tier Licensing is based on monthly Commercial Transaction Volumes (CTV) and monthly ERP Transaction Volumes (ETV). Table 4 shows the transaction tiers.

Transaction Tiers	S1	S2	S3	M1	M2	M3	L1	L2	L3	L4	X1	X2	X3	X4	E1	E2	E3	E4	E5	P1	P2	P3+
Transaction Limits																						
Monthly Commercial Transaction Volume	1K	1.5K	2K	3K	4K	5K	7.5K	10K	15K	20K	30K	50K	75K	100K	150K	200K	300K	400K	500K	750K	1M	>1M
Monthly ERP Transaction Volume	20K	30K	40K	60K	80K	100K	150K	200K	300K	400K	600K	1M	1.5M	2M	3M	4M	6M	8M	10M	15M	20M	>20M

Table 4: Transaction Tiers

The Monthly Commercial Transaction Volume is equal to the single highest volume of transactions among these transaction types: sales orders (of any order type), shipments, AR invoices, customer payments, purchase orders, purchase receipts, AP bills, and AP payments.

Here is an example of how CTV is measured for Acme Company for a single month. During that month, Acme Company processed 800 AR invoices, 700 customer payments, 400 AP invoices, 200 vendor payments, and 500 sales orders (300 quotes and 200 orders). The single highest volume for the month was the 800 AR invoices, so Acme Company's Monthly CTV for the given month is 800.

The ERP Transaction Volume in Acumatica is calculated by adding the number of times an object within the platform is created or modified. This happens every time a user clicks "Save" on an Acumatica form. The ETV is in place to protect the health of the system from extra ordinary consumption related to customer specific processes such as custom development projects that use the platform in a way that results in low CTV but still involves many transactions. For instance, a customization may generate many GL (General Ledger) transactions from an external source, without creating commercial transactions. It is important to note that single saves may result in multiple ERP transactions, and customizations may also impact the ETV.

For a company to remain in compliance with CTV and ETV licensing requirements, its monthly CTV and ETV must not exceed the volume allowed by the Subscription Agreement for any three (3) months during a trailing twelve (12) month period. Acumatica provides a License Monitoring Console form as a central location for viewing all license information, making it simple for customers to know their license usage. With this real-world usage data, customers can determine if they need to consider increasing, or even possibly decreasing, their license needs.

Private Cloud Perpetual (PCP)

As of July 2021, Acumatica has discontinued the sale of Private Cloud Perpetual (PCP) licenses. Customers who are currently using PCP Licensing should view the Acumatica Licensing Guide Supplement located at http://www.acumatica.com/agreements.

Concurrent User Licensing

Advanced and Enterprise customers who may not be a good fit for the consumption model can choose User-based Licensing (Concurrent Users).

Concurrent User Licensing is based on the number of simultaneous users accessing the system at a given time. With this licensing, the Acumatica system allows only a set number of users to concurrently log in.

If a customer has chosen Concurrent-User Licensing and an Acumatica offer is only defined for Transaction-tier Licensing (example: free processing node with X1 tier or higher), then use the table below to determine which transaction tier to apply.

Number of Users	1-10	11-25	26-50	51-100	101-250	251-500	501+
Transaction Tiers	S1 – S3	M1 – M3	L1 - L2	L3 - L4	X1 - X4	E1 - E5	P1 - P3
Edition Size	Small	Advanced			Enterprise		

Table 3: Concurrent User and Transaction Tier Licensing Map

Named User Licensing

Small Business Edition customers utilize Named User Licensing.

Named User Licensing is based on the number of individual users licensed to use the Acumatica Cloud ERP system. Each named user must have his or her own username and password; the sharing of usernames by more than one individual is not permitted. This licensing does not limit the number of users that can be created in the system; it only limits the number of users that can be marked as active. This is only available with Small Business Editions.

For each licensed named user, customers receive an API user. API users are not allowed to access the system via the user interface.

System Constraints and Recommendations

In addition to the licensing based on functionality and usage described above, other parameters can affect system performance or access to specialized modules. These may vary depending on the selected licensing mode. Parameters that can impact system performance and responsiveness are addressed in System Recommendations, while those that have strict limitations are addressed in System Constraints.

System Constraints

The system constraints listed in the table below are additional parameters of the Acumatica License Agreement. The constraints for Small Business and Advanced Editions are firm and cannot be extended, which means that additional items beyond the constraints will not be processed or allowed.

Item	Small Business Edition	Advanced Edition	Enterprise Edition	Maximum for Enterprise Edition
Lines per transaction	1,000	2,000	5,000	50,000[1]
Serial numbers per document	2,000	7,500	10,000	50,000[1]
Web API users[2]	10	30	35	Unlimited
Concurrent web API requests[3]	1	3	10	Varies[4]
Max web API requests per minute[3]	50	150	250	Unlimited

Table 1: System Constraints

[1]Can be elevated to these maximums by request for customers on SaaS Reserved Resources or PCS.
[2]With user-based pricing, Web API users cannot exceed the total number of users.
[3]These are only provided as hard limits only. Actual achievement can be lower depending on resource levels available, number of processing nodes licensed, and nature/complexity of operation being performed with requests. Number of web requests the system can accept awaiting processing cannot is limited to 20 for the base license. Processing nodes and reserved resources can impact the maximum number of requests the system can accept awaiting processing.
[4]For PCS only and it should not exceed the number of CPU cores available on the customer server. For SaaS customers, limit can vary based on number of processing nodes and reserved resources level licensed.

Lines per transaction: Lines per transaction constraints apply to all Acumatica screens with multiple detail lines. Examples include Journal Transaction Detail Lines, Shipment Packages, Activities, Sales Order Detail Lines, etc. Project documents can have up to the maximum transaction lines for both Revenue and Cost Budget Lines.

Serial numbers per document: This defines the maximum number of serial numbers allowed in the Detail Lines of Sales Orders, Purchase Orders, Shipments, and other documents.

Web API users: Acumatica allows several simultaneous API connections. When the number of connections exceeds the maximum, the system will prevent additional users from logging in. External applications which fail to logout will continue to take up a Web API user connection.

Concurrent web API requests: While Acumatica can accept many web API requests for processing, only a set number can be processed concurrently. The number of requests the system can accept as well as the number of requests it can process concurrently is dependent on edition size and number of processing nodes licensed. External integrations requiring an elevated level of activity can improve their performance by either submitting fewer requests when the system is busy or by adding one or more Processing Nodes.

Max web API requests per minute: The amount of time Acumatica takes to process requests can vary depending on the nature of the request. Acumatica provides a large constraint value, but a customer's actual throughput could be significantly less depending on the nature of their requests. Adding Additional Processing Nodes improves throughput by providing room for more concurrent requests.

System Recommendations

The system recommendations listed in Table 2 and Table 7(below) are designed to provide customers with guidance to help them achieve optimal performance. Customers surpassing these recommended limits may experience suboptimal operating conditions and a corresponding degradation in performance, but the system will not prevent the limits from being surpassed. Please note that degradation and timeout conditions can occur based on many factors such as complexity of operations being performed, number of processing nodes license, reserved resources licensing, integrations concurrency, resources available, and other factors. Consult with Acumatica on how to best select licensing options to meet your needs when operating in high volume operations.

Transaction Tiers	S1	S2	S3	M1	M2	M3	L1	L2	L3	L4	X1	X2	X3	X4	E1	E2	E3	E4	E5
System Recommendations																			
Concurrent Users	50			100			250				500				1,000				
Daily Commercial Transaction Volume	100			300			500		1,000		2,500				7,500	10,000	15,000	20,000	25,000
Daily ERP Transaction Volume	2K			6K			10K		20K		50K				150K	200K	300K	400K	500K
Inventory Items *	50,000			100,000			200,000				250,000				300,000				
Fixed Assets *	1,000			5,000			10,000				20,000				20,000				
Business Accounts *	50,000			100,000			200,000				250,000				300,000				

* Increasing above these recommendations can significantly impact performance if running reports or processes that query the full set

Table 2: System Recommendation Maximums For Consumption Based Subscriptions

Number of Users	1-10	11-25	26-50	51-100	101-250	251-500	501+
Daily ERP Transaction Volume	2K	6K	10K	20K	50K	300K	500K
Daily Commercial Transaction Volume (CTV)	100	300	500	1K	3K	15K	25K
Hourly Commercial Transaction volume (CTV)	10	30	50	100	300	1,500	2,500

Table 3: System Recommendations for User-Based Subscriptions and Licensing

Product Releases

Acumatica's Product Releases deliver high quality upgrades on a predictable schedule. This means customers can stay on the most current release of the product while having ample time to preview major upgrades before going live with them.

Acumatica bundles several enhancements into its two major, biannual releases. In addition to these major releases, Acumatica delivers regular, minor updates (typically every 2–8 weeks), which primarily contain high severity fixes and changes that do not disrupt existing customizations or integrations. Acumatica uses a standardized process, which allows customers to schedule when and how they will receive major releases and minor updates. While upgrading to each major release is not mandatory, it is highly recommended. Skipping multiple major releases can cause issues with compatibility and support and may require additional effort to upgrade. At a minimum, customers should upgrade at least once a year to benefit from additional functionality and ensure their version of Acumatica does not reach its Retirement Date. For each new major release, Acumatica announces the Support Period for the release and its expected Retirement Date. In most cases, each release is supported for 18 months and is then retired.

Acumatica Always Current and Acumatica Flex Programs

Acumatica Always Current Program. SaaS customers who receive the benefits of the Always Current Program update their systems to each new Acumatica release, which reduces upgrade costs and gives them immediate access to the latest features. Customers on the Always Current Program can select different upgrade options as described in the table below.

Edition	Always Current Upgrade Options
Small Business Edition	Upgrade every 6 months within 120 days of release or purchase Acumatica Flex
Advanced Edition	Upgrade every 6 or 12 months (select which half of year to upgrade) within 120 days of release, or purchase Acumatica Flex
Enterprise Edition	Acumatica Flex included or select any Always Current plan

Table 5: Always Current Upgrade Options

- **Upgrades** contain new features and are published twice per year. Customers on the Always Current Program must upgrade to the most recent version prior to their Scheduled Upgrade Date. Acumatica will automatically upgrade customers who have not upgraded by their Scheduled Upgrade Date.
- **Updates** contain bug fixes and non-breaking changes and are published approximately every two weeks immediately after an Upgrade and then less frequently until the Upgrade reaches end-of-life. Acumatica will automatically apply Updates on the customer's Monthly Maintenance Date.

Acumatica Flex Program. SaaS customers who need more flexible upgrade timing can purchase the Acumatica Flex Program to replace the Always Current Program. With the Flex Program, customers using customizations or products that are not Acumatica Certified can choose their own upgrade date prior to the end-of-life of their current version.

Tenants

Acumatica Cloud ERP allows customers to operate with one tenant or multiple tenants. A single tenant can contain an unlimited number of entities. Entities within a single tenant automatically share customers, vendors, employees, and the chart of accounts. However, customers can decide what elements should be shared or not shared between entities in different tenants. Additional tenant license packs are available for all Acumatica Advanced and Enterprise Editions. Whether the customer is using Consumption- or User-based Licensing, the licensing stipulations will be applied to all entities and tenants. No extra licensing will be required if the total consumption or user count across all companies and tenants does not exceed the license limits.

Price Protection

The Acumatica Price Cap ensures that renewal prices for Acumatica PCS and SaaS Subscriptions will not increase by more than 10% per year. Renewal price increases will be applied to the prices listed on the customer's most current Order Form. However, discounts listed on this Order Form will not apply to renewals, and the Price Cap does not apply to services, support, or Acumatica Marketplace products. The Price Cap will remain in effect if the customer complies with the terms of the Subscription Agreement and any related documents, and if there is no reduction in the customer's edition, transaction tier, or number of users. If the customer's needs change during the initial subscription term, and if this change involves an increase in the number of users and/or requires switching the customer to a higher-level edition or transaction tier, then any currently active discount will be applied pro rata to the standard list price of the upgrade for the remainder of the initial subscription term.

Appendix A: Edition Datasheets

Distribution Edition Datasheet

Acumatica Distribution Edition is ideal for wholesale and distribution organizations that need robust ERP functionality with integrated financials and inventory management capabilities. This Datasheet lists all included and optional modules for the Distribution Edition.

For the chart below: ☑ module included, ☐ module is available, ◪ module can be requested, ☒ module not available.

Distribution Edition	Small Business	Advanced	Enterprise
Acumatica Base System Modules			
Financials	☑	☑	☑
Global Financials	☒	☐	☐
Intercompany Accounting	◪	☐	☐
Deferred Revenue	◪	☐	☐
Contracts (AR Billing for Subscription Contracts, Contract Integration with CRM Cases)	◪	☐	☐
Fixed Assets	☐	☐	☐
Cash Basis Reporting	☐	☐	☐
Monitoring and Automation	☑	☑	☑
Inventory Control (Requires Order Management)	☑	☑	☑
Order Management	☑	☑	☑
Shipping Carrier Integration	☐	☐	☐
Warehouse Management	◪	☐	☐
Project Accounting	◪	☐	☐
Advanced Expense Management*	☐	☐	☐
AP Document Recognition*	☐	☐	☐
CRM (SFA, MA)	☐	☐	☐
Business Card Recognition*	☐	☐	☐
Case Management (Requires CRM)	☐	☐	☐
Portals for CRM	◪	☐	☐
Salesforce Sync (Requires CRM)	☒	☐	☐
Exchange Integration	☒	☐	☐
Outlook Add-in	☐	☐	☐
Storable Integration	☐	☐	☐
Multi-factor Authentication	☑	☑	☑
Advanced Authentication	◪	☐	☐
Included Tenants	1	1	1
Additional Tenant Packs and Consolidation (1 and 5 packs)	☒	☐	☐
Acumatica Flex Program	◪	☐	☑
Upgrade to 10 Named Users (For Small Business Edition only)	☐	☒	☒
Secondary License (Separate DB and Site)	☒	☐	☐
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	◪	◪	◪
MRP (Required when purchasing Manufacturing, except in the Small Business Edition)	◪	◪	◪
Product Configurator	☒	◪	◪
Estimating	☒	◪	◪
Planning and Scheduling	☒	◪	◪
Engineering Change Control	☒	◪	◪
Manufacturing Data Collection	☒	◪	◪
Arena PLM Integration	☒	◪	◪
Field Service Modules			
Field Service Management (Up to 1,000 appointments / month)	☐	☐	☐
Field Service Upgrades: Add 1K, 5K, or 25K appointments / month	◪	☐	☐
Field Service Management (Up to 10 Scheduled Techs [People and Vehicles])	◪	◪	◪
Field Service Upgrades: Add 10, 50, or 250 Techs	☒	◪	◪
Equipment Maintenance (Requires Service Management)	☐	☐	☐
Route Management (Limited availability; requires Service Management)	☒	◪	◪

Retail Modules			
BigCommerce Integration (Single site BigCommerce Connector)	☐	☐	☐
Shopify Integration	☐	☐	☐
Shopify Integration with POS Pro Integration	☐	☐	☐
Additional Site for Commerce Integration	◸	☐	☐
Point of Sale powered by IIG (1 store + 3 workstations)	◸	◸	◸
Additional POS Stores and Registers	◸	◸	◸
Construction Modules			
Construction Features	⊠	⊠	⊠
Construction Project Management	⊠	⊠	⊠
Retainage	⊠	◸	◸
Cost Codes (Requires Project Accounting)	⊠	◸	◸
Property Management (Requires Contracts)	◸	◸	◸
Construction for Other Editions (Requires Project Accounting; includes Cost Codes and Retainage)	◸	◸	◸
US Payroll			
Acumatica Payroll, includes 10 employees	☐	☐	☐
Acumatica Payroll Expansion, additional 10 employees	☐	☐	☐
Acumatica Payroll Expansion, additional 50 employees	◸	☐	☐
Acumatica Payroll Expansion, additional 250 employees	⊠	☐	☐
Localization			
Canada, UK, and Mexico Localizations (Including applicable language packs)	☐	☐	☐
Additional Language Packs (French Canadian, Mexican Spanish)	☐	☐	☐

* Available in limited geographies; see Module-Specific Licensing section for details.

Retail Edition Datasheet

The Acumatica Retail Edition is ideal for online retailers that need integrated ecommerce capabilities, advanced financial and inventory management features, and robust ERP functionality. This Datasheet lists all included and optional modules for the Retail Edition.

For the chart below: ☑ module included, ☐ module is available, ◸ module can be requested, ⊠ module not available.

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Financials	☑	☑	☑
Global Financials	⊠	☐	☐
Intercompany Accounting	◸	☐	☐
Deferred Revenue	◸	☐	☐
Contracts (AR Billing for Subscription Contracts, Contract Integration with CRM Cases)	◸	☐	☐
Fixed Assets	☐	☐	☐
Cash Basis Reporting	☐	☐	☐
Monitoring and Automation	☑	☑	☑
Inventory Control (Requires Order Management)	☑	☑	☑
Order Management	☑	☑	☑
Shipping Carrier Integration	☐	☐	☐
Warehouse Management	◸	☐	☐
Project Accounting	◸	☐	☐
Advanced Expense Management*	☐	☐	☐
AP Document Recognition*	☐	☐	☐
CRM (SFA, MA)	☐	☐	☐
Business Card Recognition*	☐	☐	☐
Case Management (Requires CRM)	☐	☐	☐
Portals for CRM	◸	☐	☐
Salesforce Sync (Requires CRM)	⊠	☐	☐
Exchange Integration	⊠	☐	☐
Outlook Add-in	☐	☐	☐
Storable Integration	☐	☐	☐
Multi-factor Authentication	☑	☑	☑
Advanced Authentication	◸	☐	☐
Included Tenants	1	1	1

	Small Business	Advanced	Enterprise
Additional Tenant Packs and Consolidation (1 and 5 packs)	⊠	□	□
Acumatica Flex Program	△	□	☑
Upgrade to 10 Named Users (For Small Business Edition)	□	⊠	⊠
Secondary License (Separate DB and Site)	⊠	□	□
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	□	□	□
MRP (Required when purchasing Manufacturing, except for Small Business Edition)	⊠	□	□
Product Configurator	⊠	□	□
Estimating	⊠	□	□
Planning and Scheduling	⊠	□	□
Engineering Change Control	⊠	□	□
Manufacturing Data Collection	⊠	□	□
Arena PLM Integration	⊠	□	□
Field Service Modules			
Field Service Management (Up to 1,000 appointments / month)	□	□	□
Field Service Upgrades: Add 1K, 5K, or 25K appointments / month	△	□	□
Field Service Management (Up to 10 Scheduled Techs [People and Vehicles])	△	△	△
Field Service Upgrades: Add 10, 50, or 250 Techs	⊠	△	△
Equipment Maintenance (Requires Service Management)	□	□	□
Route Management (Limited availability; requires Service Management)	⊠	△	△
Retail Modules			
BigCommerce Integration (Single Site BigCommerce Connector)	□	□	□
Shopify Integration	□	□	□
Shopify Integration with POS Pro Integration	□	□	□
Additional Site for Commerce Integration	△	□	□
Point of Sale powered by IIG (1 store + 3 workstations)	△	△	△
Additional POS Stores and Registers	△	△	△
Construction Modules			
Construction features	⊠	⊠	⊠
Construction Project Management	⊠	⊠	⊠
Retainage	⊠	△	△
Cost Codes (Requires Project Accounting)	⊠	△	△
Property Management (Requires Contracts)	△	△	△
Construction for Other Editions (Requires Project Accounting; includes Cost Codes and Retainage)	△	△	△
US Payroll			
Acumatica Payroll, includes 10 employees	□	□	□
Acumatica Payroll Expansion, additional 10 employees	□	□	□
Acumatica Payroll Expansion, additional 50 employees	△	□	□
Acumatica Payroll Expansion, additional 250 employees	⊠	□	□
Localization			
Canada, UK, and Mexico Localizations (Includes applicable language packs.)	□	□	□
Additional Language Packs (French Canadian, Mexican Spanish)	□	□	□

* Available in limited geographies; see Module-Specific Licensing section for additional details.

Manufacturing Edition Datasheet

Acumatica Manufacturing Edition is ideal for organizations that need to manage manufacturing processes. This Datasheet lists all included and optional modules for the Manufacturing Edition.

For the chart below: ☑ module included, □ module is available, △ module can be requested, ⊠ module not available.

Manufacturing Edition	Small Business	Advanced	Enterprise
Acumatica Base System Modules			
Financials	☑	☑	☑
Global Financials	⊠	□	□
Intercompany Accounting	△	□	□
Deferred Revenue	△	□	□
Contracts (AR Billing for Subscription Contracts, Contract Integration with CRM Cases)	△	□	□
Fixed Assets	□	□	□

Cash Basis Reporting	☐	☐	☐
Monitoring and Automation	☑	☑	☑
Inventory Control (Requires Order Management)	☑	☑	☑
Order Management	☑	☑	☑
Shipping Carrier Integration	☐	☐	☐
Warehouse Management	◨	☐	☐
Project Accounting	◨	☐	☐
Advanced Expense Management*	☐	☐	☐
AP Document Recognition*	☐	☐	☐
CRM (SFA, MA)	☐	☐	☐
Business Card Recognition*	☐	☐	☐
Case Management (Requires CRM)	☐	☐	☐
Portals for CRM	◨	☐	☐
Salesforce Sync (Requires CRM)	☒	☐	☐
Exchange Integration	☒	☐	☐
Outlook Add-in	☐	☐	☐
Storable Integration	☐	☐	☐
Multi-Factor Authentication	☑	☑	☑
Advanced Authentication	◨	☐	☐
Included Tenants	1	1	1
Additional Tenant Packs and Consolidation (1 and 5 packs)	☒	☐	☐
Acumatica Flex Program	◨	☐	☑
Upgrade to 10 Named Users (For Small Business Edition)	☐	☒	☒
Secondary License (Separate DB and Site)	☒	☐	☐
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	☑	☑	☑
MRP (Required when purchasing Manufacturing, except Small Business Edition)	◨	☑	☑
Product Configurator	☒	☐	☐
Estimating	☒	☐	☐
Planning and Scheduling	☒	☐	☐
Engineering Change Control	☒	☐	☐
Manufacturing Data Collection	☒	☐	☐
Arena PLM Integration	☒	☐	☐
Field Service Modules			
Field Service Management (Up to 1,000 appointments / month)	☐	☐	☐
Field Service Upgrades: Add 1K, 5K, or 25K appointments / month	◨	☐	☐
Field Service Management (Up to 10 Scheduled Techs [People and Vehicles])	◨	◨	◨
Field Service Upgrades: Add 10, 50, or 250 Techs	☒	◨	◨
Equipment Maintenance (Requires Service Management)	☐	☐	☐
Route Management (Limited availability; requires Service Management)	☒	◨	◨
Retail Modules			
BigCommerce Integration (Single Site BigCommerce Connector)	☐	☐	☐
Shopify Integration	☐	☐	☐
Shopify Integration with POS Pro Integration	☐	☐	☐
Additional Site for Commerce Integration	◨	☐	☐
Point of Sale powered by IIG (1 store + 3 workstations)	◨	◨	◨
Additional POS Stores and Registers	◨	◨	◨
Construction Modules			
Construction Features	☒	☒	☒
Construction Project Management	☒	☒	☒
Retainage	☒	◨	◨
Cost Codes (Requires Project Accounting)	☒	◨	◨
Property Management (Requires Contracts)	◨	◨	◨
Construction for Other Editions (Requires Project Accounting; includes Cost Codes and Retainage)	◨	◨	◨
US Payroll			
Acumatica Payroll, includes 10 employees	☐	☐	☐
Acumatica Payroll Expansion, additional 10 employees	☐	☐	☐
Acumatica Payroll Expansion, additional 50 employees	◨	☐	☐
Acumatica Payroll Expansion, additional 250 employees	☒	☐	☐
Localization			
Canada, UK, and Mexico Localizations (Includes applicable language packs)	☐	☐	☐

| Additional Language Packs (French Canadian, Mexican Spanish) | ☐ | ☐ | ☐ |

* Available in limited geographies; see Module-Specific Licensing section for additional details.

Construction Edition Datasheet

Acumatica Construction Edition is ideal for construction organizations, including general contractors, land developers, home builders, and more. This Datasheet lists all included and optional modules for the Construction Edition.

For the chart below: ☑ module included, ☐ module is available, ◸ module can be requested, ☒ module not available.

Construction Edition	Small Business	Advanced	Enterprise
Acumatica Base System Modules			
Financials	☑	☑	☑
Global Financials	☒	☐	☐
Intercompany Accounting	◸	☐	☐
Deferred Revenue	◸	☐	☐
Contracts (AR Billing for Subscription Contracts, Contract Integration with CRM Cases)	◸	☐	☐
Fixed Assets	☐	☐	☐
Cash Basis Reporting	☐	☐	☐
Monitoring and Automation	☑	☑	☑
Inventory Control (Requires Order Management)	☐	☐	☐
Order Management	☑	☑	☑
Shipping Carrier Integration	☐	☐	☐
Warehouse Management	◸	☐	☐
Project Accounting	☑	☑	☑
Advanced Expense Management*	☐	☐	☐
AP Document Recognition*	☐	☐	☐
CRM (SFA, MA)	☐	☐	☐
Business Card Recognition*	☐	☐	☐
Case Management (Requires CRM)	☐	☐	☐
Portals for CRM	◸	☐	☐
Salesforce Sync (Requires CRM)	☒	☐	☐
Exchange Integration	☒	☐	☐
Outlook Add-in	☐	☐	☐
Storable Integration	☐	☐	☐
Multi-factor Authentication	☑	☑	☑
Advanced Authentication	◸	☐	☐
Included Tenants	1	1	1
Additional Tenant Packs and Consolidation (1 and 5 packs)	☒	☐	☐
Upgrade to 10 Named Users (For Small Business Edition)	☐	☒	☒
Secondary License (Separate DB and Site)	☒	☐	☐
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	☐	☐	☐
MRP (Required when purchasing Manufacturing, except Small Business Edition)	☒	☐	☐
Product Configurator	☒	☐	☐
Estimating	☒	☐	☐
Planning and Scheduling	☒	☐	☐
Engineering Change Control	☒	☐	☐
Manufacturing Data Collection	☒	☐	☐
Arena PLM Integration	☒	☐	☐
Field Service Modules			
Field Service Management (Up to 1,000 appointments / month)	☐	☐	☐
Field Service Upgrades: Add 1K, 5K, or 25K appointments / month	◸	☐	☐
Field Service Management (Up to 10 Scheduled Techs [People and Vehicles])	◸	◸	◸
Field Service Upgrades: Add 10, 50, or 250 Techs	☒	◸	◸
Equipment Maintenance (Requires Service Management)	☐	☐	☐
Route Management (Limited availability; requires Service Management)	☒	◸	◸
Retail Modules			
BigCommerce Integration (Single Site BigCommerce Connector)	☐	☐	☐

Shopify Integration	□	□	□
Shopify Integration with POS Pro Integration	□	□	□
Additional Site for Commerce Integration	◸	□	□
Point of Sale powered by IIG (1 store + 3 workstations)	◸	◸	◸
Additional POS Stores and Registers	◸	◸	◸
Construction Modules			
Construction Features	☑	☑	☑
Construction Project Management	□	□	□
Retainage	☑	☑	☑
Cost Codes (Requires Project Accounting)	☑	☑	☑
Property Management (Requires Contracts)	□	□	□
Construction for other Editions (Requires Project Accounting; includes Cost Codes, Retainage)	⊠	⊠	⊠
US Payroll			
Acumatica Payroll, includes 10 employees	□	□	□
Acumatica Payroll Expansion, additional 10 employees	□	□	□
Acumatica Payroll Expansion, additional 50 employees	◸	□	□
Acumatica Payroll Expansion, additional 250 employees	⊠	□	□
Localization			
Canada, UK, and Mexico Localizations (Includes applicable language packs)	□	□	□
Additional Language Packs (French Canadian, Mexican Spanish)	□	□	□

* Available in limited geographies; see Module-Specific Licensing section for additional details.

General Business Datasheet

Organizations that do not fit into one of Acumatica's Industry Editions can purchase the General Business Edition. This Datasheet lists all included and optional modules for the General Business Edition.

For the chart below: ☑ module included, □ module is available, ◸ module can be requested, ⊠ module not available.

General Business Editions	Small Business	Advanced	Enterprise
Acumatica Base System Modules			
Financials	☑	☑	☑
Global Financials	⊠	□	□
Intercompany Accounting	◸	□	□
Deferred Revenue	◸	□	□
Contracts (AR Billing for Subscription Contracts, Contract Integration with CRM Cases)	◸	□	□
Fixed Assets	□	□	□
Cash Basis Reporting	□	□	□
Monitoring and Automation	☑	☑	☑
Inventory Control (Requires Order Management)	□	□	□
Order Management	□	□	□
Shipping Carrier Integration	□	□	□
Warehouse Management	◸	□	□
Project Accounting	◸	□	□
Advanced Expense Management*	□	□	□
AP Document Recognition*	□	□	□
CRM (SFA, MA)	□	□	□
Business Card Recognition*	□	□	□
Case Management (Requires CRM)	□	□	□
Portals for CRM	◸	□	□
Salesforce Sync (Requires CRM)	⊠	□	□
Exchange Integration	⊠	□	□
Outlook Add-in	□	□	□
Storable Integration	□	□	□
Multi-Factor Authentication	☑	☑	☑
Advanced Authentication	◸	□	□
Included Tenants	1	1	1
Additional Tenant Packs and Consolidation (1 and 5 packs)	⊠	□	□
Acumatica Flex Program	◸	□	☑
Upgrade to 10 Named Users (For Small Business Edition)	□	⊠	⊠

Secondary License (Separate DB and Site)	⊠	☐	☐
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	⊠	⊠	⊠
MRP (Required when purchasing Manufacturing, except Small Business Edition)	⊠	⊠	⊠
Product Configurator	⊠	⊠	⊠
Estimating	⊠	⊠	⊠
Planning and Scheduling	⊠	⊠	⊠
Engineering Change Control	⊠	⊠	⊠
Manufacturing Data Collection	⊠	⊠	⊠
Arena PLM Integration	⊠	⊠	⊠
Field Service Modules			
Field Service Management (Up to 1,000 appointments / month)	⊠	⊠	⊠
Field Service Upgrades: Add 1K, 5K, or 25K appointments / month	⊠	⊠	⊠
Field Service Management (Up to 10 Scheduled Techs [People and	⊠	⊠	⊠
Field Service Upgrades: Add 10, 50, or 250 Techs	⊠	⊠	⊠
Equipment Maintenance (Requires Service Management)	⊠	⊠	⊠
Route Management (Limited availability; requires Service Management)	⊠	⊠	⊠
Retail Modules			
BigCommerce Integration (Single Site BigCommerce Connector)	⊠	⊠	⊠
Shopify Integration	⊠	⊠	⊠
Shopify Integration with POS Pro Integration	⊠	⊠	⊠
Additional Site for Commerce Integration	⊠	⊠	⊠
Point of Sale powered by IIG (1 store + 3 workstations)	⊠	⊠	⊠
Additional POS Stores and Registers	⊠	⊠	⊠
Construction Modules			
Construction features	⊠	⊠	⊠
Construction Project Management	⊠	⊠	⊠
Retainage	⊠	◹	◹
Cost Codes (Requires Project Accounting)	⊠	◹	◹
Property Management (Requires Contracts)	◹	◹	◹
Construction for Other Editions (Requires Project Accounting; includes Cost Codes and Retainage)	◹	◹	◹
US Payroll			
Acumatica Payroll, includes 10 employees	☐	☐	☐
Acumatica Payroll Expansion, additional 10 employees	☐	☐	☐
Acumatica Payroll Expansion, additional 50 employees	◹	☐	☐
Acumatica Payroll Expansion, additional 250 employees	⊠	☐	☐
Localization			
Canada, UK, and Mexico Localizations (Includes applicable language packs)	☐	☐	☐
Additional Language Packs (French Canadian, Mexican Spanish)	☐	☐	☐

* Available in limited geographies; see Module-Specific Licensing section for additional details.

Note: Acumatica reserves the right to modify these Datasheets at any time without prior notice, and the features outlined in these Datasheets are subject to change during the term of any Subscription Agreement.