# Modern UI

The Modern UI is the new user interface of Acumatica ERP, which has been released with Version 2025 R2. The topics of this chapter provide an overview of all the functionality and capabilities that are available with the Modern UI.

In This Chapter



In Acumatica ERP 2025 R1, the Modern UI—a new technology of the user interface for Acumatica ERP forms —has been introduced. Key benefits of the Modern UI include the following:

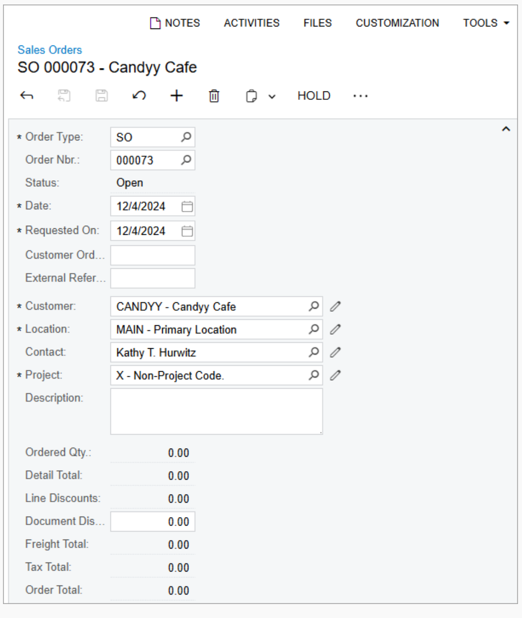
- An improved look and feel, with important information easier to find at a glance
- Faster performance
- The ability to personalize forms to fit your specific workflows and information needs
- A responsive layout that adapts seamlessly to the device you are using

In the following sections, you will find information about the notable improvements to the user experience.

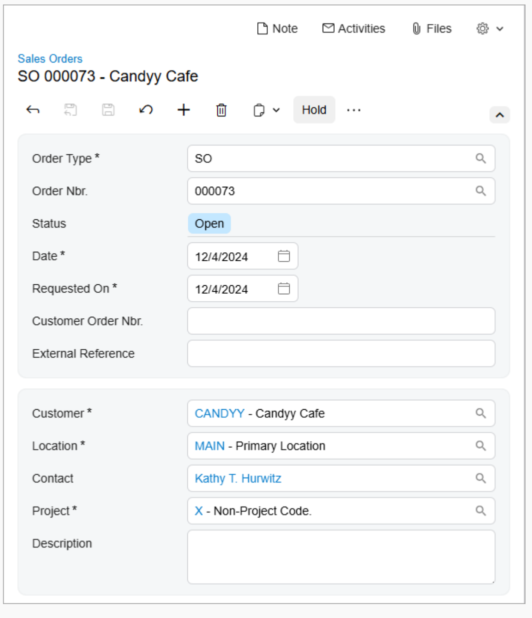
# Modern UI: Changes in UI Elements

## Responsive Layouts

Because more users access Acumatica ERP from mobile devices, the Modern UI was designed to be more mobile-friendly. In the Classic UI, forms have fixed layouts and UI elements have predefined sizes, which may look odd on some devices. The system's appearance in Modern UI is visually appealing on any device because it features flexible layouts, with forms and UI elements to adapted to different screen sizes. The following screenshots demonstrate how the same form looks on tablets in Classic UI and in Modern UI.



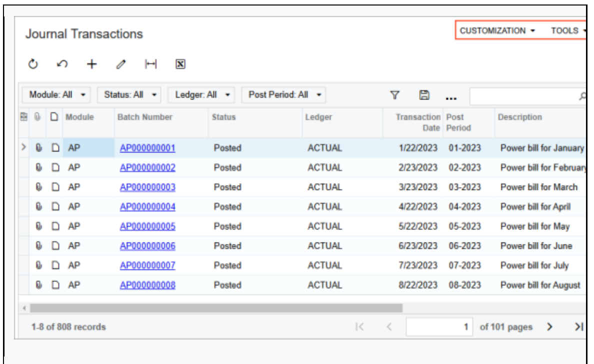

*Classic UI*



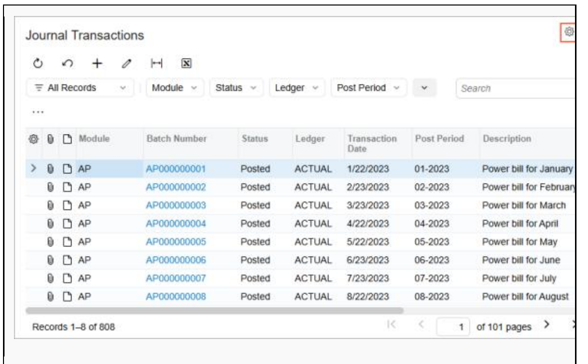

*Modern UI*

## Form Title Bar Menus

Every Acumatica ERP form in the Classic UI displays the **Customization** and **Tools** menus on the form title bar. In the Modern UI, these two menus have been combined into the Settings menu so that you can find the needed menu commands in one place. (See the following screenshots.)



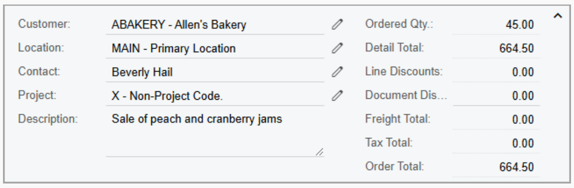

*Classic UI*



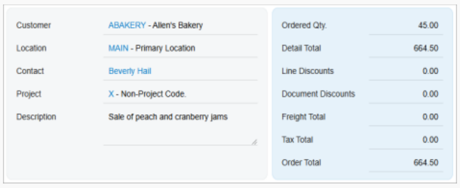

*Modern UI*

# Grouped UI Elements

In the Modern UI, related data entry fields are now visually grouped with color blocks (shown in the second screenshot below), enhancing clarity and making key settings easier to see at a glance. (These color blocks are not used in the Classic UI, as you can see in the first screenshot.)




*Classic UI*

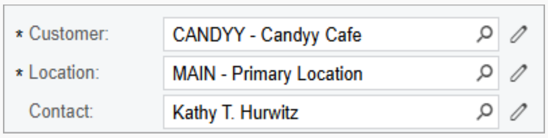



*Modern UI*

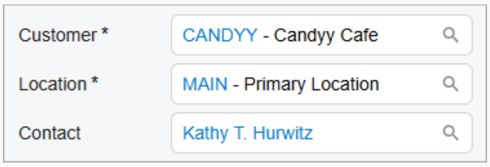
# Elements with Magnifier Buttons

If a box or column has a magnifier button, you can click the magnifier button to open a lookup table and select a value.

If a value has already been selected, you may want to view the selected record on the form where it has been created. In the Classic UI, you did this by clicking the Edit button. In the Modern UI, the system displays the selected value as a link for visual uniformity. When you click the link, the system opens the selected record on the creation form. The following screenshots show these changes.




*Classic UI*

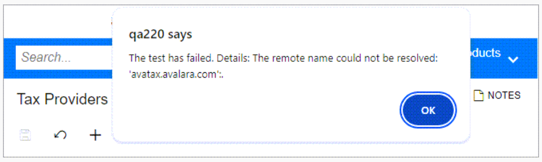



*Modern UI*

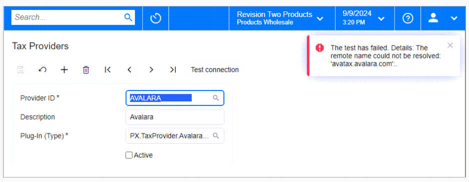
Depending on the control's configuration, the magnifier button, the link, or the Edit button may be hidden.

# Errors, Warnings, and Informational Messages

In the Classic UI, Acumatica ERP displays errors, warnings, and some informational messages by using the browser's modal dialog boxes. The Modern UI displays these messages in the form's upper-right corner. (See the following screenshots.)

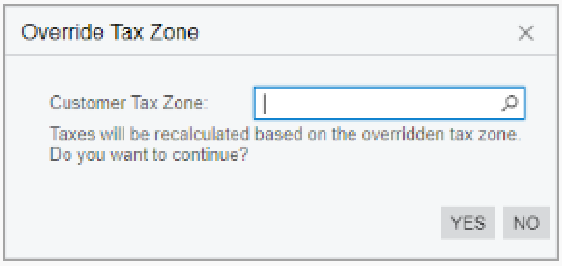



*Classic UI*

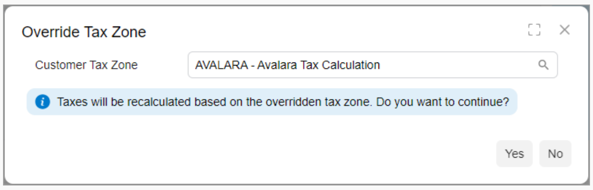



*Modern UI*

In the Classic UI, informational messages are displayed as regular text, as shown below. In the Modern UI, informational messages are now highlighted in color to make them easier to notice (also shown below).




*Classic UI*

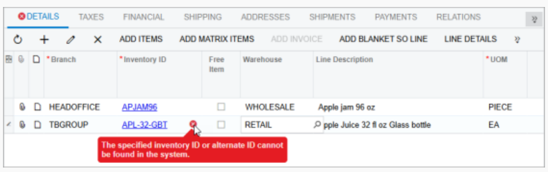



*Modern UI*

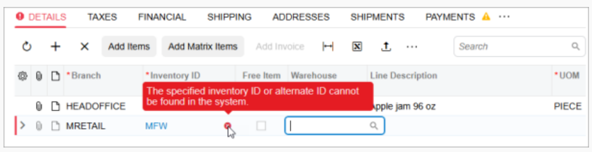
# Errors and Warnings in Table Values

In the Classic UI, when an incorrect value is entered in a table, an error icon appears next to the tab name (if applicable) and beside the cell containing the incorrect value. (See the first screenshot below.) Similarly, if there is a warning related to a cell value, a warning icon will be displayed next to both the tab and the cell. To view the description of the error or warning, you hover over the respective icon.

In Modern UI, when there is an error or warning message related to a table value, the system displays an error or warning icon next to the tab name and beside the cell containing the incorrect value; it also highlights the entire row with the error. To view the description of the error or warning, you hover over the icon or the highlighted row. (See the second screenshot below.)



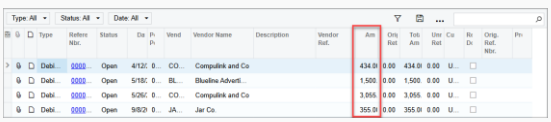

*Classic UI*



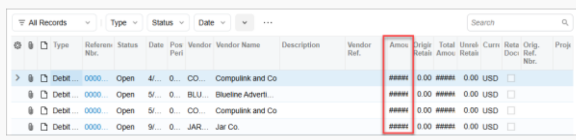

*Modern UI*

# Numeric Columns in Tables

In the Classic UI, numeric values in table cells are truncated to fit the column width (shown in the first screenshot below). In the Modern UI, when a numeric value does not fit the column width, it is replaced with the # characters (shown in the second screenshot). This explicitly indicates that the respective values did not fit. To see the actual value, you hover over the cell, and the value is displayed as a tooltip.



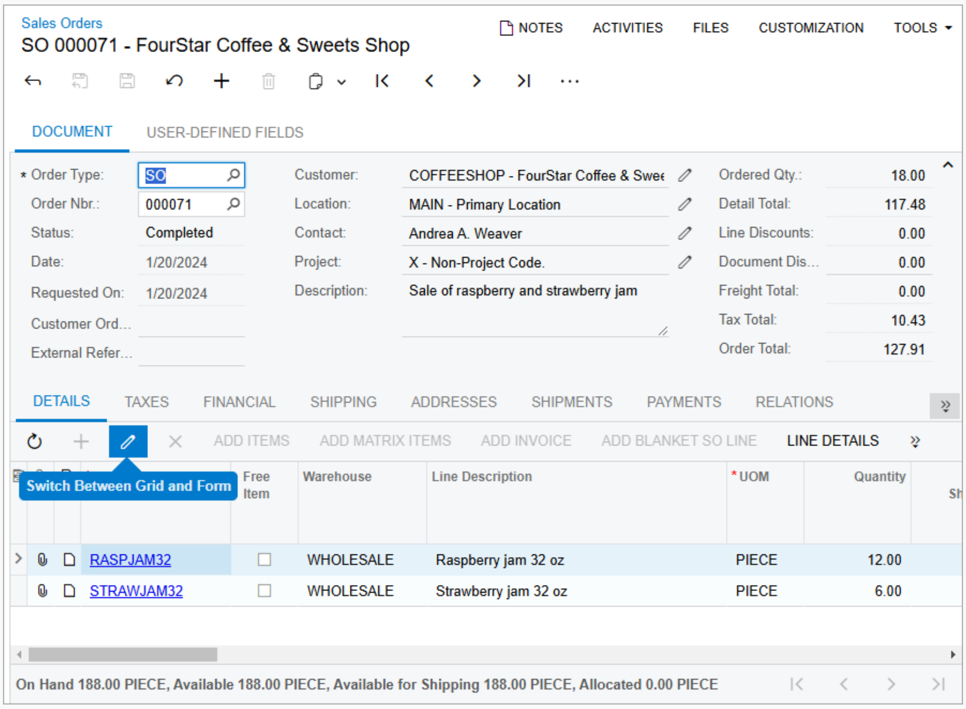
*Classic UI*



*Modern UI*

# A Single View of Data

For some tables, in the Classic UI, you can switch between a grid view and form view of the data, as shown in the following screenshot. The grid view is a standard table view, with all details arranged in a table and each row representing one detail. The form view shows a set of elements intended for only one detail or document row, and you use the navigation buttons to move to a different detail.




*Classic UI*

In Modern UI, for simplicity, this data can be viewed and entered only in the table, as it was designed to be viewed and entered.

# Table Filters

In the Modern UI, table filters have been enhanced to simplify data filtering. To learn more about these improvements, see Modern UI: Filters.

# Multiline Text Boxes

In the Classic UI, when you press Enter in a multiline text box, a new line is inserted.

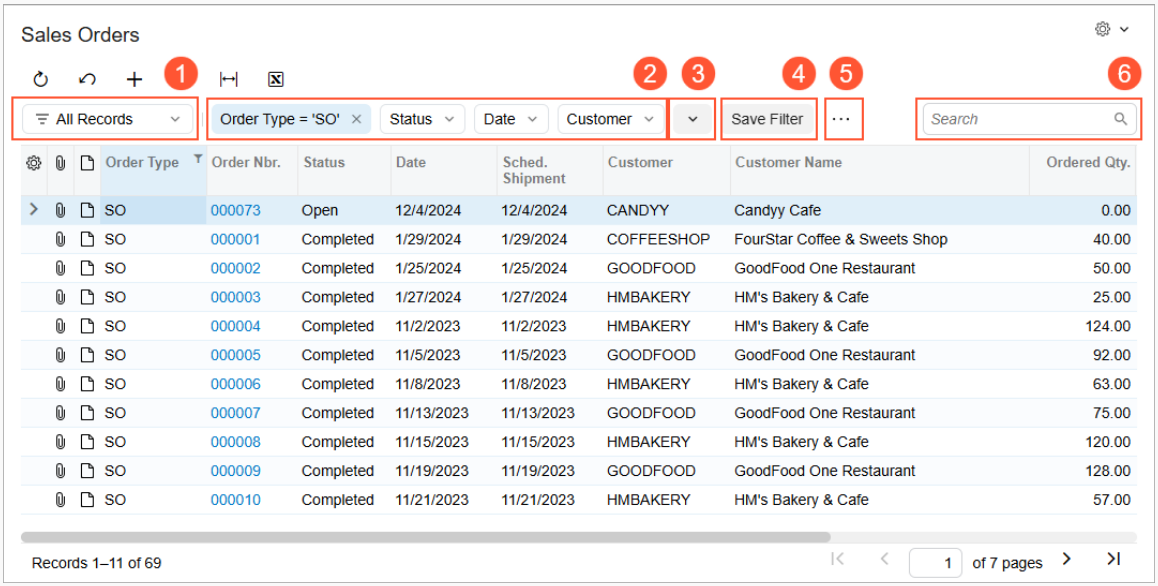
However, in the Modern UI (unless the developer has configured it otherwise), when you press Enter, the system moves the focus to the next control instead. To insert a new line in the Modern UI, you need to press Ctrl+Enter.

# Modern UI: Filters

In the Modern UI, table filters have been enhanced to simplify data filtering. Additionally, a new Advanced Filter editor has been introduced.

> The existing filters for a form will remain effective even after the form is switched to the Modern UI.

Filtering Area
The filtering area of Acumatica ERP tables has been redesigned. The screenshot below shows the basic elements of the filtering area for the Sales Orders (SO3010PL) list of records.

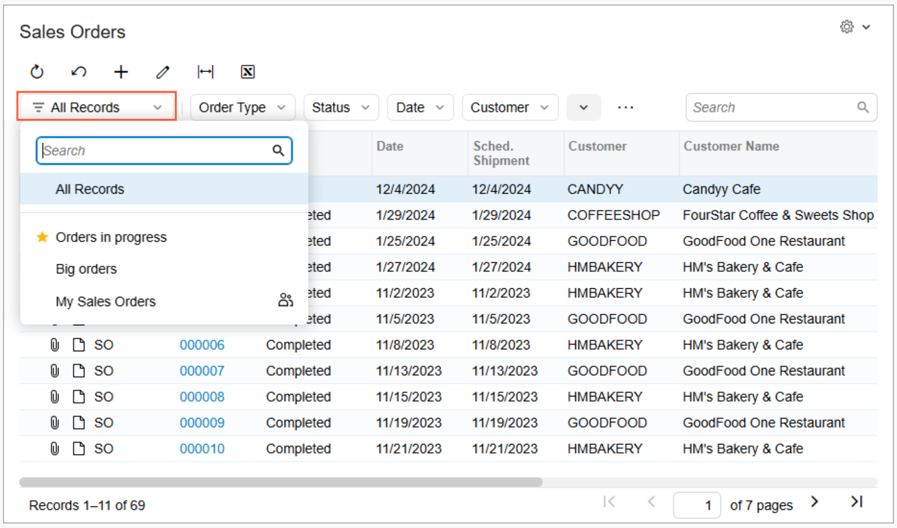



*Basic elements of the filtering area*

1. The Filter List button, which you can click to display a list of saved personal and shared filters.
2. The Quick Filter buttons, which you can click to define quick filter criteria, specify the sorting order, or remove the Quick Filter button for the respective data fields.
3. The **Add Quick Filter** button, which you can click to add more Quick Filter buttons for data fields or to open the Advanced Filter editor.
4. The **Save Filter** button, which you can use to save the filter for future usage. This button is visible only when the current filter has not been saved.
5. The **...** button, which you can click to execute menu commands for managing filters.
6. The Search box, which you can use to enter a string to highlight cell values that include the search term. By default, the maximum length for the search string is 100 characters, and the system uses the *Contains* condition to perform the search.

# Filter List

In the Modern UI, saved personal and shared filters are listed in a special Filter List drop-down menu, instead of as filter tabs as in Classic UI. To open the list of filters, click the Filter List button in the filtering area, as shown in the screenshot below.




*Filter list drop-down menu*

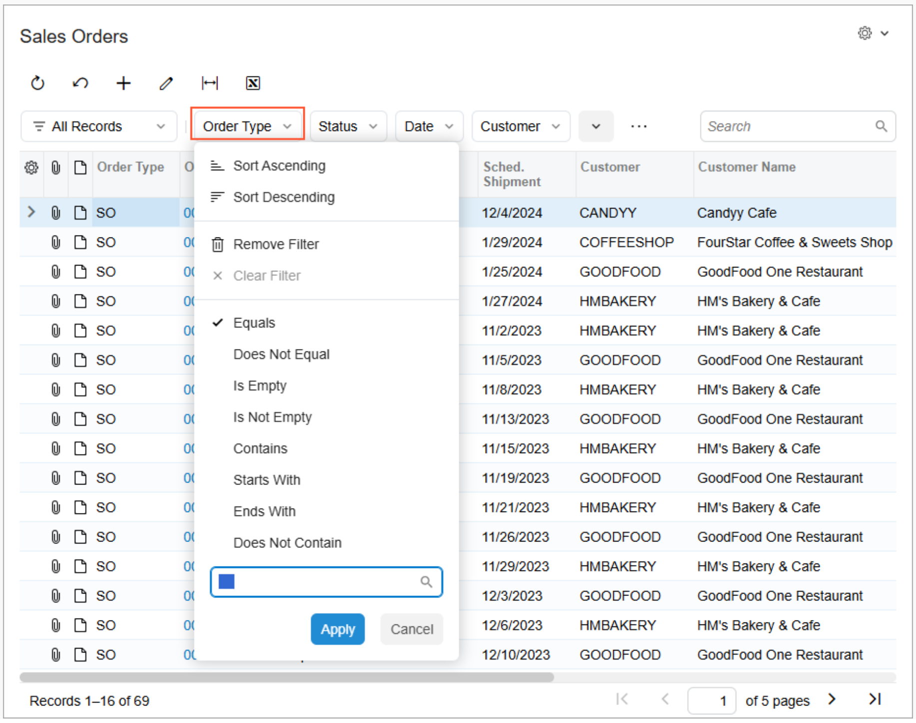
In the Filter List drop-down menu, you can perform basic actions as follows:

- To apply one of the filters, click the filter name in the list.
- To search for a filter, type its name in the search box.
- To mark a filter as a favorite, hover over the filter name and click the star icon. Favorite filters are displayed at the top of the list.

Filters shared between all users of Acumatica ERP are denoted with the icon in the Filter List drop-down menu.

# Quick Filters

A quick filter is a reusable filter that you can apply to data fields in a particular table. You can apply multiple quick filters simultaneously; if you do, you will see multiple Quick Filter buttons in the filter area. If you click one of these buttons, the Quick Filter drop-down menu will open, as shown in the screenshot below.



*Quick Filter drop-down menu*

In the Quick Filter drop-down menu, you can act upon filters as follows:

- To sort the table rows by the values of the selected data field, click **Sort Ascending** or **Sort Descending**.
- To specify filter criteria, select the conditions, specify the desired value (if needed), and click **Apply**. The list of available conditions and values varies depending on the data field type.
- To discard filtering by the respective data field, click **Clear Filter**.
- To remove the Quick Filter button for the selected data field, click **Remove Filter**.

You can also rearrange the order of Quick Filter buttons in the filtering area by dragging the button to the desired position.

To add a Quick Filter button for a particular column, do one of the following:

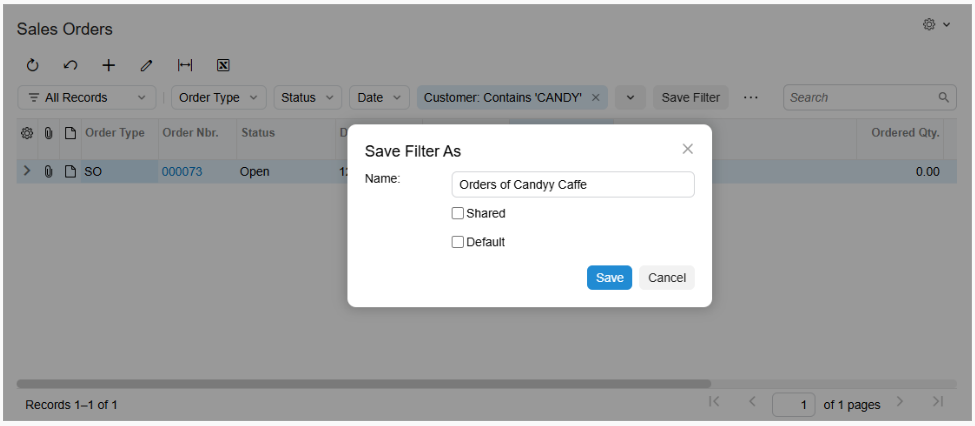
- Drag the column header to the filter area.
- Click the **Add Quick Filter** button, and select the name of the needed data field in the dialog box that opens.
- Click the column header, specify the filter conditions and value, and click **Apply**. This will add the Quick Filter button and apply the specified filter criteria.
- Click within the cell and press Shift+F. This will add the Quick Filter button and filter the contents by the value of the selected cell.

# Operations with Filters

To keep the filter criteria for future usage, or to share the filter with other users, do either of the following:

- Click the **Save Filter** button. This button is visible only when the current filter has not been saved.
- Click the **...** button in the filter area and then click the **Save As** command.

Either of these actions will open the **Save Filter As** dialog box, which is shown in the following screenshot.




*Save Filter As dialog box*

In the dialog box, you specify the name of the filter and click **Save**. Additionally, you can make the system apply this filter each time you open the form by selecting the **Default** check box before you click **Save**. Also, if you have access to the Filters (CS209010) form, you can make the filter available to other users by selecting the **Shared** check box before you click **Save**.

Saved personal and shared filters are listed in the Filter List drop-down menu.

To modify the properties of the existing filter, click the **...** button in the filter area and then click the **Edit Filter** command.

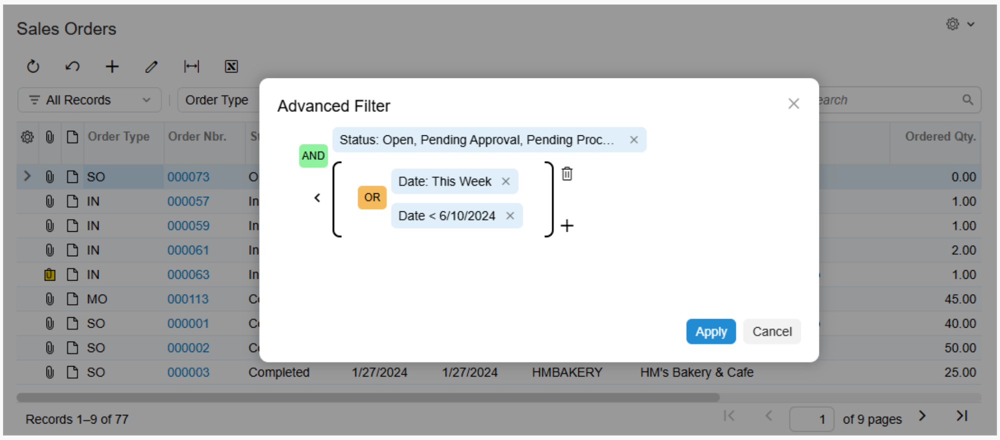
To delete an existing saved filter, click the **...** button in the filter area and then click the **Delete Filter** command.

# Advanced Filter Editor

By using the **Advanced Filter** dialog box, you can visually and intuitively specify complex filtering criteria—that is, one or more simple filtering criteria grouped and joined by logical operators. To open the dialog box, do either of the following:

- Click the **...** button in the filter area and then click the **Open Advanced Filter** command.
- Click the **Add Quick Filter** button and select **Advanced** in the dialog box that opens.

The following screenshot shows the **Advanced Filter** dialog box.

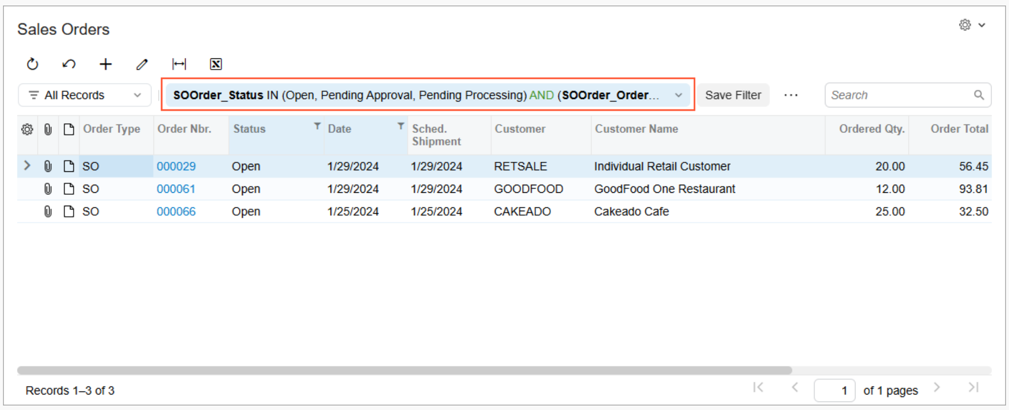



*Advanced Filter editor*

In the editor, you can do the following:

- To define filter criteria, click the name of the desired data field, specify the conditions and the desired values (if needed), and then click **Apply**. The list of available conditions and values varies depending on the data field type.
- To clear filter criteria, click the name of the desired data field and then click **Clear Filter**.
- To delete filter criteria, either click the × icon or click the name of the desired data field and then click **Remove Filter**.
- To add another data field, click the plus icon next to the existing data field and select the name of the needed data field in the dialog box that opens.
- To change the logical operator, click the operator name. Possible operators are *AND* and *OR*.
- To group multiple filter criteria, hover over the logical operator and click the › icon. Groups define the order of logical operations. Grouped criteria are denoted with parentheses.
- To cancel the grouping, hover over the parentheses and click the ‹ icon.
- To delete a group, hover over the parentheses and click the icon.
- To apply the current filter to the table and close the editor, click **Apply**.
- To close the editor without applying the filter, click **Cancel**.

Once the advanced filter has been applied to a table, it is displayed as a row in the filtering area, as shown in the following screenshot.




*Advanced filter applied to a table*

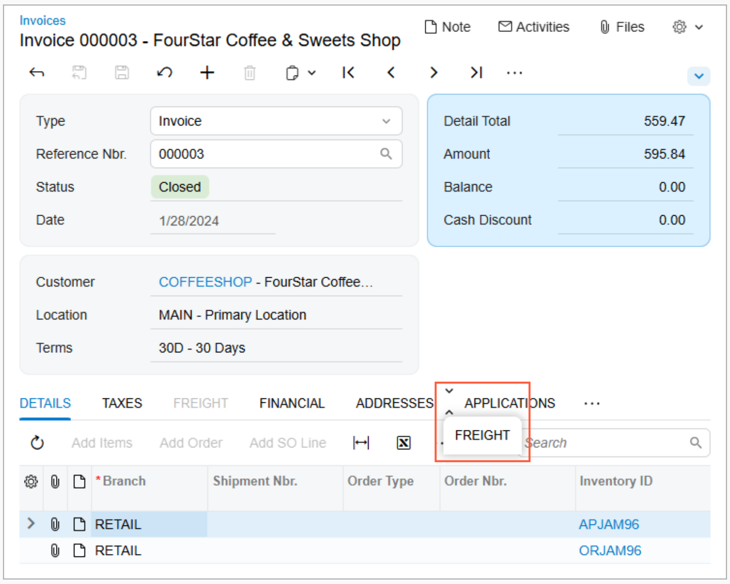
# Modern UI: User Personalization

By using functionality of the Modern UI, you can easily customize the layout of forms. This topic describes various ways that you can adjust the user interface for your own user accounts. In the Modern UI, personal layouts of forms are retained between sessions and apply only to your user account.

## Customizing Tab Controls

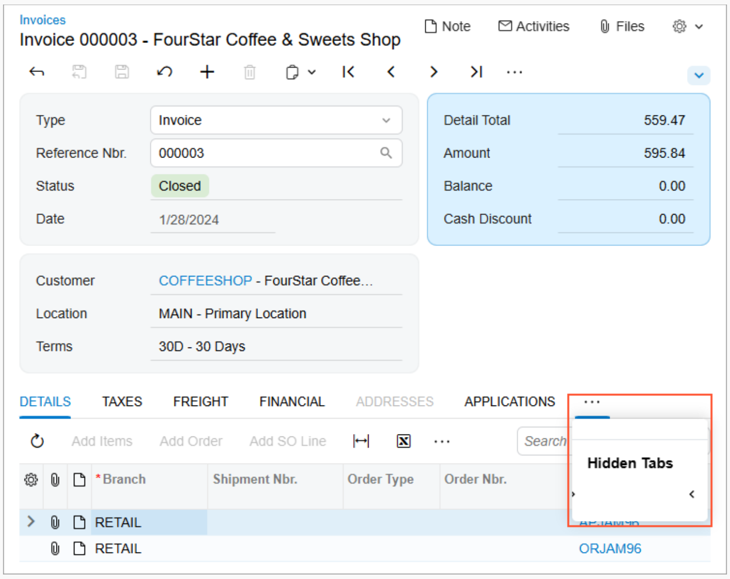
Once a form has been switched to the Modern UI, you can change the order of tabs and hide or display individual tabs. Changes to the tab controls will be applied to the personal layout of the form.

To reorder a tab, click and hold the tab name and then drag it to the desired position (as shown in the screenshot below).




*Reordering tabs*

To hide a tab, click and hold the tab name, drag it first to the More button, and then drag it to the **Hidden Tabs** section (as shown in the screenshot below).



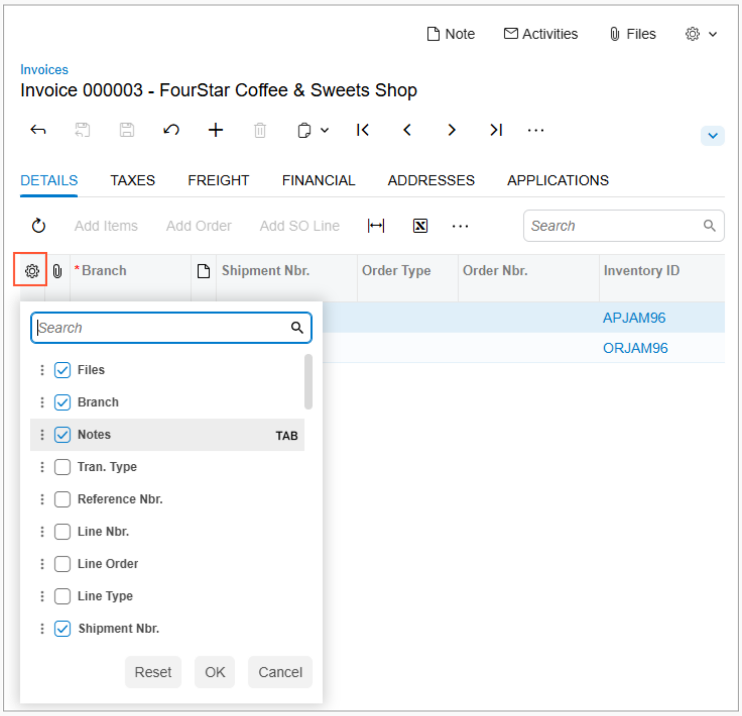

*Hiding tabs*

To display a hidden tab, click the More button and then drag the tab name from the **Hidden Tabs** section to the needed position.

# Customizing Table Controls

In Modern UI, you can customize the appearance and content of table controls: add or remove visible columns, reorder columns, and change any column's width. Changes to the table would be applied to the personal layout of the form.

In the Modern UI the Settings button is displayed in the upper-left corner of the table control. By clicking this button, you can open the Column Configuration dialog box, as shown in the following screenshot.




*Column Configuration dialog box*

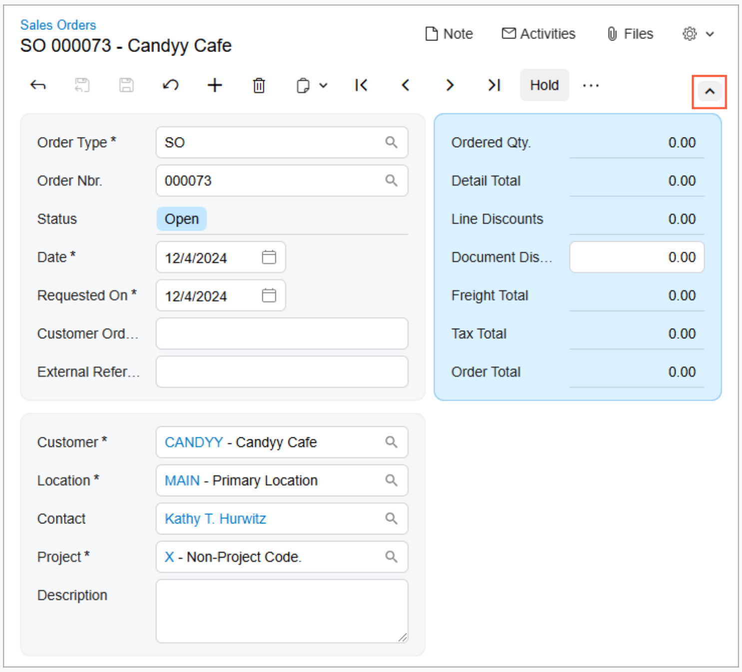
In the Column Configuration dialog box, you can do any of the following:

- To hide or display a column, clear or select the check box next to the column name.
- To modify the order of the columns, drag the column name to the desired position in the list.
- To change whether the column should receive focus when you press Tab, hover over the column name and click **Tab** to change its state (which will cause the word to be crossed out or appear normal).
- To apply the column configuration, click **OK**.
- To cancel the column customization, click **Cancel**.
- To reset the customization and restore the default layout of the table, click **Reset**.

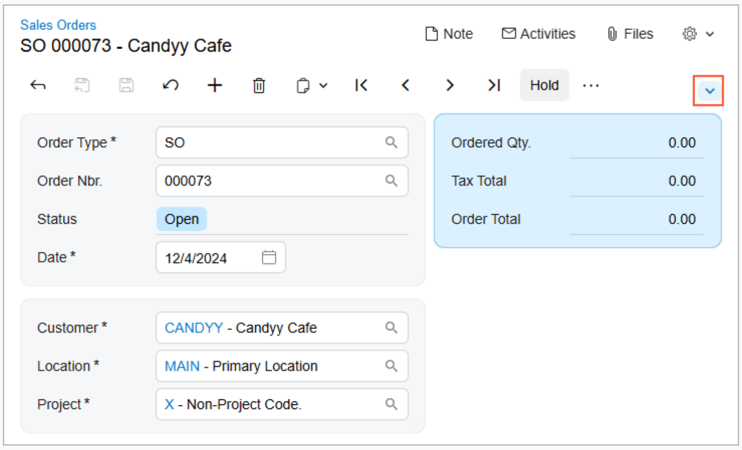
# Customizing Group of UI Elements

You can collapse and expand certain controls to display fewer or more data fields. The collapsed or expanded state of the controls is retained for your user account between sessions.

To expand or collapse a set of data fields, click the arrow icon in the form toolbar, as shown in the screenshots below.




*Expanded group of UI elements*




*Collapsed group of UI elements*

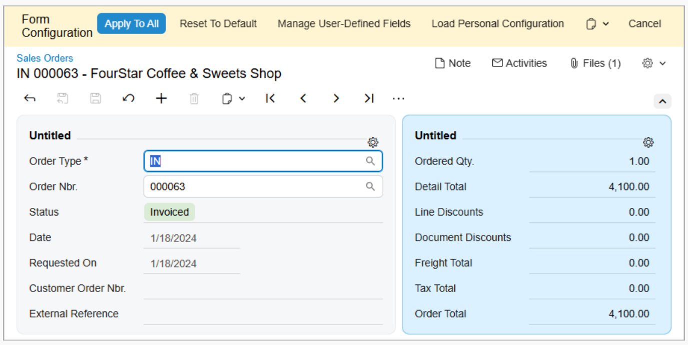
# Modern UI: Site-Wide Personalization

With Modern UI functionality, if you have the appropriate privileges, you can modify and customize the overall appearance of Acumatica ERP forms, including both standard and custom forms. Additionally, you can set a default form layout for the entire site. You can perform this site-wide personalization only if your user account is assigned both the *Administrator* and *Customizer* roles.

Any site-wide modifications you make will be shared among all system users. When you apply these changes, you can choose to either keep or override any personal configurations that system users have made.

# Using Form Configuration Mode

To modify a form's appearance, you click the Settings button on the form title bar and then click **Screen Configuration**. You are now working in Form Configuration mode (as shown in the following screenshot) for the current form; if you navigate to another form, the mode is deactivated, discarding any changes you have made.




*A form in Form Configuration mode*

When Form Configuration mode is active, the system does the following:

- Applies either the default layout of the current form or the layout shared between all users (if one has been configured)
- Displays the Form configuration pane on the top of the form
- Displays the Settings buttons next to each fieldset and tab control

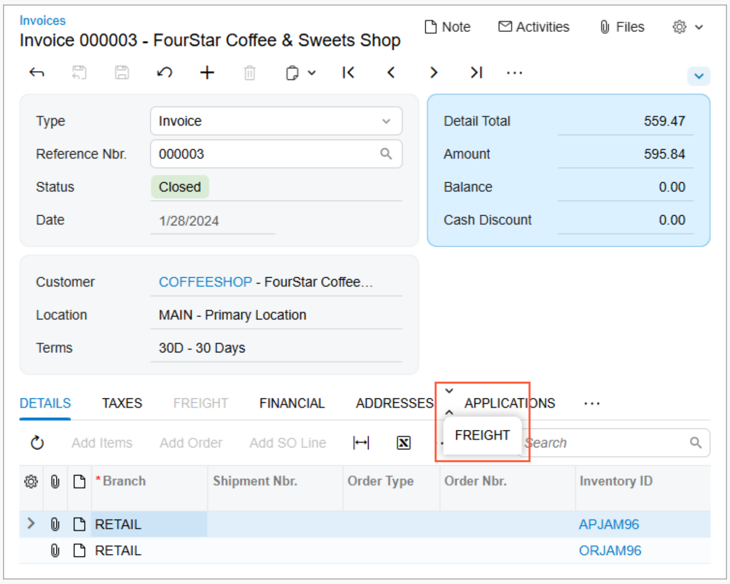
The buttons that appear in the Form Configuration pane are described in the following table.

| Button | Description |
|---|---|
| **Apply to All** | Applies the changes to the layout shared between all users and deactivates Form Configuration mode. The system prompts you about whether it should replace or retain the personalized layouts of individual users. |
| **Reset to Default** | Restores the form to the default layout supplied by Acumatica ERP. |
| **Manage User-Defined Fields** | Opens a dialog box where you can manage user-defined fields associated with the current form. See Modern UI: Managing User-Defined Fields for details. |
| **Load Personal Configuration** | Opens a dialog box that displays other users' customized layouts for the current form and gives you the ability to apply the selected layout to the layout shared between all users. |
| **Export Configuration** | Exports the current form's configuration to an external file. |
| **Import Configuration** | Imports the form's configuration from an external file and applies it to the current form. |
| **Cancel** | Discards all changes and deactivates Form Configuration mode. |

# Customizing Tab Controls

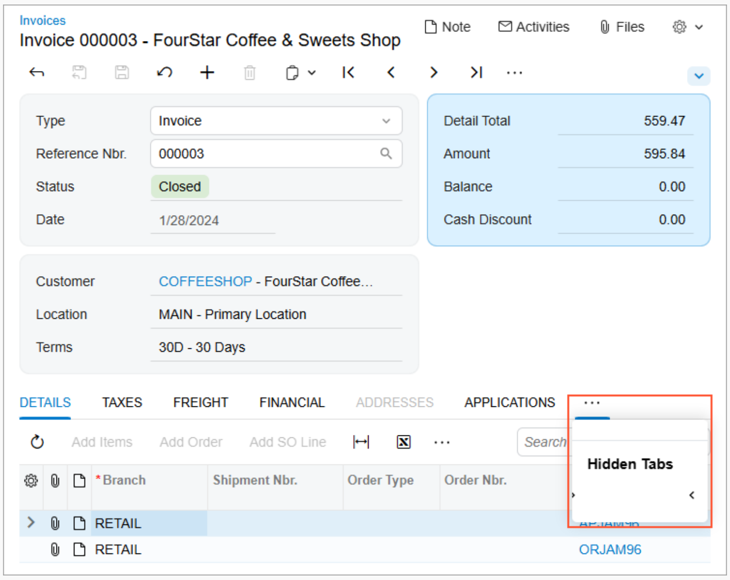
In Form Configuration mode, you can change the order of tabs and hide or display individual tabs. Changes to the tab controls will be applied to form layout shared among all users.

To reorder a tab, click and hold the tab name and then drag it to the desired position (as shown in the screenshot below).




*Reordering tabs*

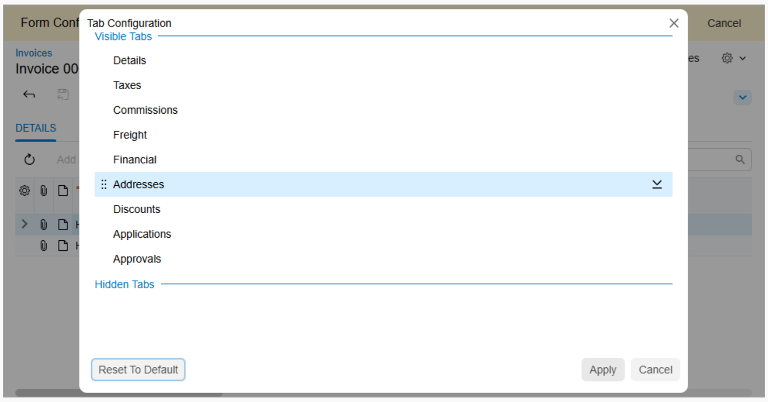
To hide a tab, click and hold the tab name, drag it first to the More button, and then drag it to the **Hidden Tabs** section (as shown in the screenshot below).




*Hiding tabs*

To display a hidden tab, click the More button and then drag the tab name from the **Hidden Tabs** section to the needed position.

Additionally, in Form Configuration mode, Settings buttons appear next to each tab control. If you click one of these buttons, the **Tab Configuration** dialog box opens for the tab, as shown in the screenshot below.




*Tab Configuration dialog box*

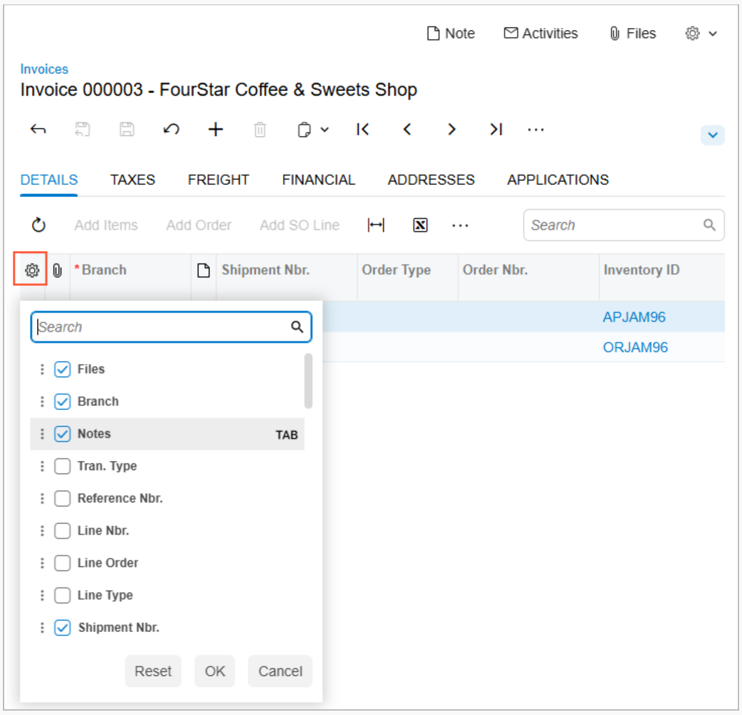
In the **Tab Configuration** dialog box, you can do the following:

- To hide a tab, drag it from the **Visible Tabs** section to the **Hidden Tabs** section, or click the arrow button next to the tab name.
- To display a tab, drag it from the **Hidden Tabs** section back to the **Visible Tabs** section, or click the arrow button next to the tab name.
- To modify the order of the tabs, drag the tab name to the desired position in the list.
- To apply the tab configuration, click **Apply**.
- To cancel the customization of the tab, click **Cancel**.
- To reset the customization and restore the default layout of the tab control, press **Reset to Default**.

# Customizing Tables

In Form Configuration mode, you can add or remove visible columns, reorder columns, and change a column’s width. Any changes you make to the table will be applied to the layout that all users share.

In the Modern UI the Settings button is displayed in the upper-left corner of the table control. By clicking this button, you can open the Column Configuration dialog box, as shown in the following screenshot.




*Column Configuration dialog box*

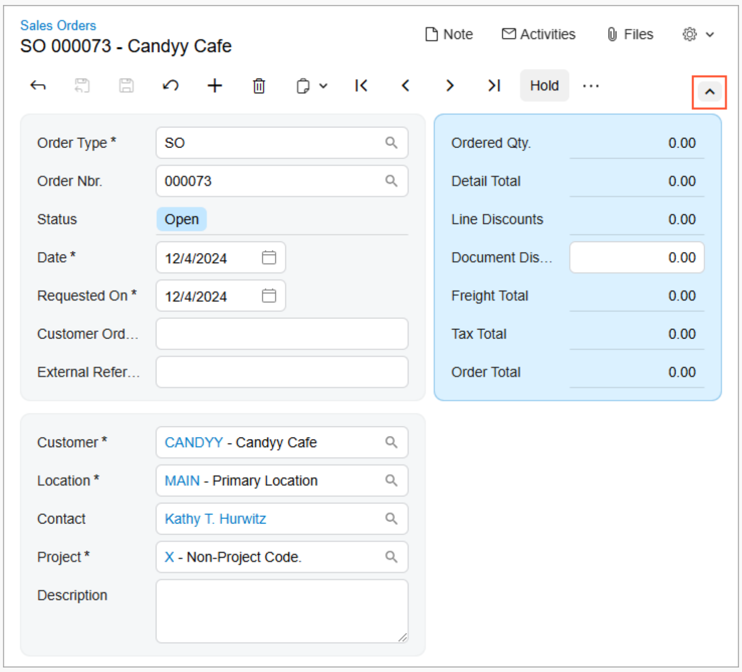
In the Column Configuration dialog box, you can do any of the following:

- To hide or display a column, clear or select the check box next to the column name.
- To modify the order of the columns, drag the column name to the desired position in the list.
- To change whether the column should receive focus when you press Tab, hover over the column name and click **Tab** to change its state (which will cause the word to be crossed out or appear normal).
- To apply the column configuration, click **OK**.
- To cancel the column customization, click **Cancel**.
- To reset the customization and restore the default layout of the table, click **Reset**.

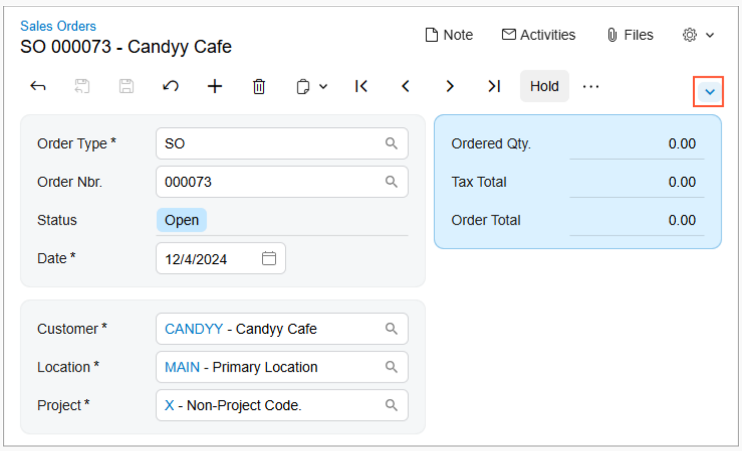
# Customizing Fieldsets

In Form Configuration mode, you can expand and collapse certain controls to display fewer or more data fields. The collapsed or expanded state of the controls would be applied to form layout shared between all users.

To expand or collapse a set of data fields, click the arrow icon in the form toolbar, as shown in the screenshots below.

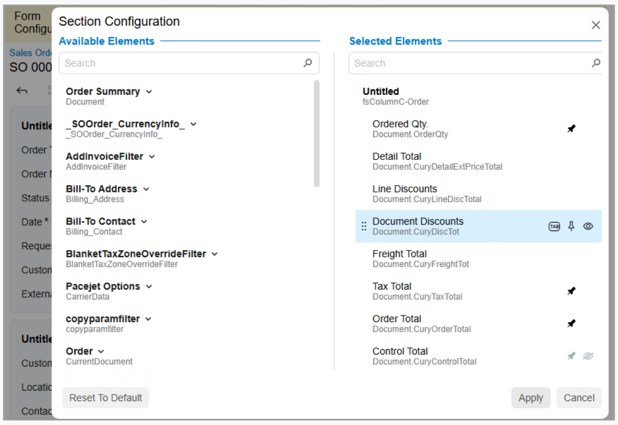



*Expanded group of UI elements*




*Collapsed group of UI elements*

Additionally, when Form Configuration mode is active, the Settings buttons appear in the upper-right corner of the fieldsets. If you click one of these buttons, the **Section Configuration** dialog box opens, as shown in the screenshot below.




*Section Configuration dialog box*

In the **Section Configuration** dialog box, you can perform the following actions:

- To rename the fieldset, hover over the group title in the **Selected Elements** pane, click the **Edit** button, and specify the new name of the fieldset.
- To add a UI element to the fieldset, locate the desired element in the **Available Elements** pane and drag it to the **Selected Elements** pane.
- To remove a UI element from the fieldset, hover over the element name in the **Selected Elements** pane and click the **Delete** button.

Default UI elements cannot be removed; only personalized elements can be.

- To change whether the UI element should receive focus when a user presses Tab, hover over the element name in the **Selected Elements** pane and click **Tab** to change its state (which will cause the word to be crossed out or appear normal).
- To change whether the UI element should be displayed when the fieldset is collapsed, hover over the element name in the **Selected Elements** pane and click **Pin**.
- To hide the UI element, hover over the element name in the **Selected Elements** pane and click the **Visible** button. If all elements in a fieldset are hidden, the entire fieldset becomes hidden.
- To modify the order of UI elements, drag the element name to the desired position in the **Selected Elements** pane.
- To apply the fieldset configuration, click **Apply**.
- To cancel fieldset customization, click **Cancel**.
- To reset the customization and restore the default layout, click **Reset to Default**.

# Modern UI: Managing User-Defined Fields

When personalizing data entry forms across the site in the Modern UI, you can conveniently add user-defined fields directly to these forms. For more information about user-defined fields, see the Managing Attributes and User-Defined Fields chapter.

> You can perform site-wide personalization only if your user account is assigned both the *Administrator* and *Customizer* roles.

## Managing User-Defined Fields of a Form

Adding each user-defined field to a form in the Modern UI involves the following steps:

1. Selecting or creating the attribute that will be used as the user-defined field. User-defined fields are based on predefined and site-specific attributes that have been defined in the system.
2. Associating the selected field with the desired form.
3. Adding the field as a UI element to the desired section of the form.

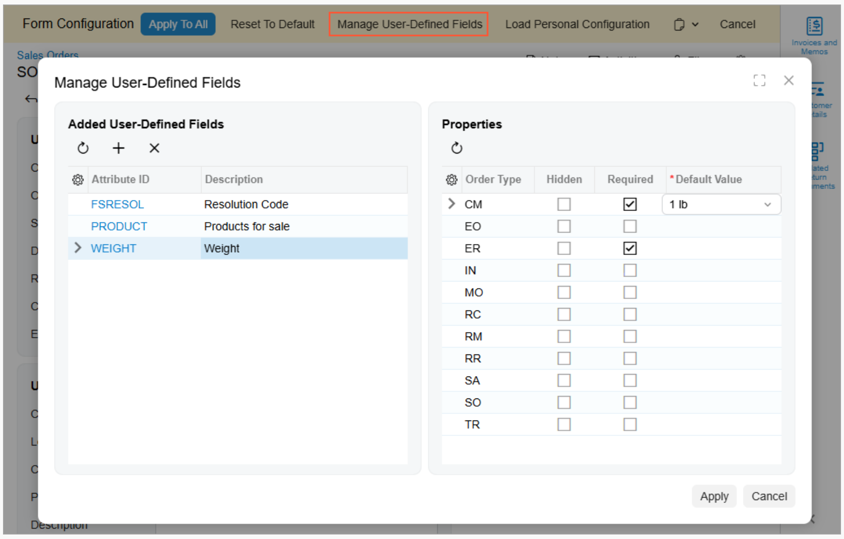
Each of these steps is described in the sections below.

## Choosing Attributes

Before adding any user-defined fields to a form, you should be sure the corresponding attributes have been defined on the Attributes (CS205000) form. These attributes can be either ones already defined in the system or new ones that you create. For instructions on how to create attributes, see To Create an Attribute.

## Associating the Field with the Form

To associate a user-defined field with the form where it will be shown, you open this form and use the **Manage User-Defined Fields** dialog box (shown in the screenshot below). To open the dialog box, you first turn on Form Configuration mode by clicking the Settings button on the form title bar and then clicking **Screen Configuration**. Then you click the **Manage User-Defined Fields** button at the top of the form.




*The Manage User-Defined Fields dialog box*

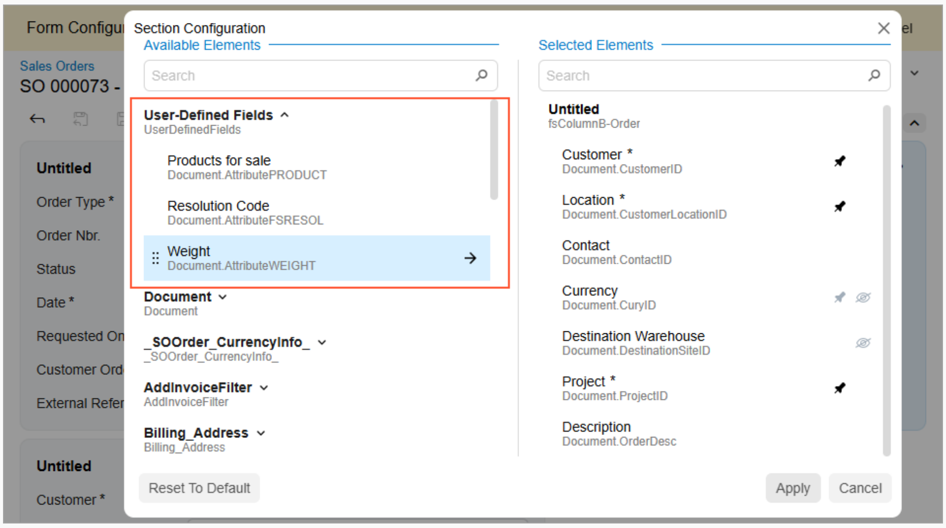
In the **Manage User-Defined Fields** dialog box, you can perform the following actions:

- To associate a user-defined field with the form, click the **Add Row** button in the **Added User-Defined Fields** pane and specify the ID of the attribute in the **Attribute ID** column.
- To remove a user-defined field from a form, first click the row in the **Added User-Defined Fields** pane and then click the **Delete Row** button on the table toolbar.
- To refresh the list of user-defined fields, click the **Refresh** button on the table toolbar of the **Added User-Defined Fields** pane.
- To refresh the list of properties, click the **Refresh** button on the table toolbar of the **Properties** pane.

- To denote that a field should not be displayed on the form, select the desired field and record type (if the form supports multiple types of records) and select the **Hidden** check box.
- To mark a field as mandatory, select the desired field and record type (if the form supports multiple types of records) and select the **Required** check box.
- To specify the field’s default value, select the desired field and record type (if the form supports multiple types of records) and specify the value in the **Default Value** column.
- To close the dialog box and apply the changes to the user-defined fields, click **Apply** in the lower right corner.
- To close the dialog box without saving any changes, click **Cancel** in the lower right corner.

# Adding a Field to the Form

Once user-defined fields are associated with the form, you can add them to any fieldset of the form by using the **Section Configuration** dialog box (shown in the screenshot below). To open the dialog box, you first turn on Form Configuration mode by clicking the Settings button on the form title bar and then clicking **Screen Configuration**. Then you click the Settings button in the top-right corner of the target fieldset.




*User-defined fields in the Section Configuration dialog box*

User-defined fields associated with the form are listed under the **User-Defined Fields** node of the **Available Elements** pane.

To add a field to the fieldset, locate the field in the **Available Elements** pane and drag it to the **Selected Elements** pane.

Once you have added all the needed user-defined fields, click **Apply** to close the **Section Configuration** dialog box. Then click **Apply to All** in the Form Configuration pane to apply the layout changes to the form and turn off Form Configuration mode.

In this way, you can customize any form to display user-defined fields.