Acumatica Licensing Guide
for products introduced on or after April 2024

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.
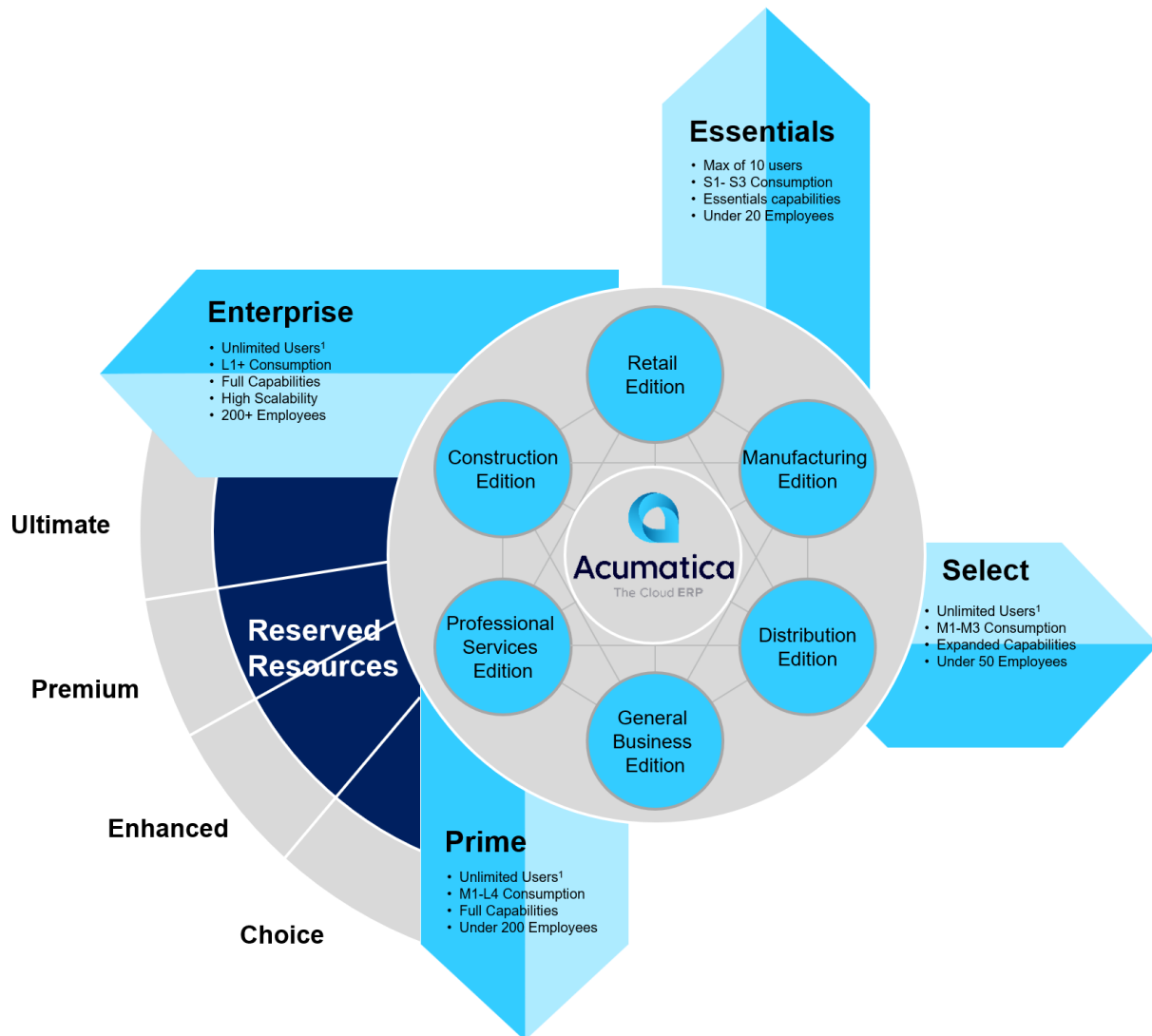
This model eliminates the fees licensees would incur from buying and maintaining their own hosting infrastructure and gives them the flexibility to increase or decrease their license features as their businesses grow and change. Customers can add features to their licenses at any time, but features can 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.

Acumatica Products

Acumatica Cloud ERP is delivered in the form of Industry Editions, each available in different Configuration 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 Configuration Sizes, the Industry Editions, the modules they can contain, and how they are configured to best serve companies of varied sizes.

Essentials
- Max of 10 users
- S1- S3 Consumption
- Essentials capabilities
- Under 20 Employees

Enterprise
- Unlimited Users[1]
- L1+ Consumption
- Full Capabilities
- High Scalability
- 200+ Employees

Select
- Unlimited Users[1]
- M1-M3 Consumption
- Expanded Capabilities
- Under 50 Employees

Prime
- Unlimited Users[1]
- M1-L4 Consumption
- Full Capabilities
- Under 200 Employees

Ultimate
Premium
Enhanced
Choice

Reserved Resources

Retail Edition
Construction Edition
Manufacturing Edition
Professional Services Edition
Distribution Edition
General Business Edition

Acumatica
The Cloud ERP

Products for Varying Company Sizes and Needs

Acumatica products are designed to deliver varying capabilities and are sized to meet the demands of varying organizational workloads.

Acumatica Essentials

All Essentials Editions are designed to meet the needs of smaller organizations and include access for five named users. Acumatica Essentials can be upgraded to ten named users. The included modules vary according to the chosen Industry Edition. See Appendix A for more information on included and optional modules.

Acumatica Select

All Select Editions are designed for small business organizations (typically up to 50 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.

The number of users using the system is assumed to be fewer than 50% of the employees, with an even mix of regular and casual users.

Acumatica Prime

All Prime Editions are designed for lower mid-market organizations (up to 200 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.

The number of users using the system is assumed to be fewer than 50% of the employees, with an even mix of regular and casual users.

Acumatica Enterprise

All Enterprise Editions are designed for any size organization that requires advanced financial and ERP functionality and capabilities in a reserved resource environment. Included modules vary based on the Industry Edition selected. See Appendix A for more information on included and optional modules.

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.

Professional Services

Acumatica Professional Services Edition is designed to help small and midsized professional services firms -- such as engineering, architecture, and IT services -- thrive in today's digital economy. It empowers firms to efficiently manage projects, optimize resources, and ensure accurate billing. Appendix A: Edition Datasheets lists all included and optional modules for the Professional Services 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.*

Other Products

Acumatica may introduce new products, including variations of existing offerings, and entirely new products or editions. Such new products may not include all the modules available in other Acumatica products or editions. You should contact Acumatica for additional product-specific information.

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, UK, and Canada, in the English language. The service includes 1,000 transactions per month with the option of purchasing 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.

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.

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 (SRR) refers to a set of additional system resources that are earmarked for a customer. SRRs ensure that this extra set of resources is always available to the client, regardless of the overall demand by other customers in the standard cloud environment.

SRRs come in varying sizes to meet the individual needs for different types of performance workloads. In addition to making more resources available, SRRs also increase Parallelism and Concurrency capabilities for increased throughput and interactions capacity.

These capabilities combined allow SRRs to significantly boost the volume of Daily ERP Transactions that can be processed and the number of Web Services API requests that can be processed per minute for individual customers that license SRRs.

	Transactions Max Boost[1]	Parallelism Included	Parallelism Max[2]	Concurrency (Queue Size)	Processing Nodes Included
Choice	2X	4	8	20	0
Enhanced	3X	8	12	40	1
Premium	4X	8	24	80	1
Ultimate	6X	16	Scalable	80+/Scalable	1

Table 1. SRR Features

[1] Multiple applied to recommended maximum of daily EPR transactions and Web Services API requests per minute. See Acumatica Licensing Guide for more details. Additional processing nodes may be required, depending on workload.

[2] Processing nodes increase Parallelism based on size and number of processing nodes added.

In summary, customers with high volume workloads utilizing SRRs benefit from additional resources and a high degree of resource independence from other traffic in the standard SaaS environment. This provides enhanced performance, higher thresholds for Daily ERP transactions, and increased throughput for Web API operations.

SRR availability varies by product, as shown in the table below.

	Essentials	Select	Prime	Enterprise
Choice	X	Optional	Optional	X
Enhanced	X	X	Optional	Included
Premium	X	X	X	Optional
Ultimate	X	X	X	Optional

Table 2. SRR Availability by Product

Processing Nodes

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 separating these operations, Processing Nodes ensure that the primary Acumatica application unit servicing end user requests remains responsive and free from potential lags caused by intensive background tasks.

Depending on the product you are using, or if you have subscribed to specific SaaS Reserved Resources offerings, an embedded Processing Node may be included for enhanced performance. While Embedded Processing Nodes are also a logically separated application unit, they do share certain system resources such as memory and computing power with the primary Acumatica application unit servicing end user requests.

Separately licensed Reserved Resource Processing Nodes do not share any memory and computing resources with the Primary application unit, thereby providing an extra layer of protection against resource shortages.

Acumatica offers several Processing Node sizes. Customers are recommended to only use processing nodes that offer equal or higher level of parallelism of their base system.

Acumatica Enterprise can be scaled using multiple Processing Nodes, allowing improved 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 an 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	Essentials	Select	Prime	Enterprise
Data Storage	50 GB	50 GB	100 GB	500 GB

Table 3: Included SaaS Data Storage

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

Transaction Tier Licensing is based on monthly Commercial Transaction Volumes (CTVs).

Transaction Tiers	S1	S2	S3	M1	M2	M3	L1	L2	L3	L4	X1	X2	X3	X4	E1	E2	E3	E4	E5	P1	P2	P3+
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

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.

For a company to remain in compliance with CTV licensing requirements, its monthly CTV 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 tier to match their needs.

Note: Essentials is available as a Consumption License but is limited to only Named Users as described in Table 5 below.

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.

API connections are accounted for separately, and the number included varies by product. API connections or users designated as API users are not allowed to access the system via the user interface. The table below illustrates the number of named users and API connections included in, and the maximum number of named users allowed for each product under the Named User Licensing model.

	Essentials	Select	Prime	Enterprise
Named Users Included	5	10	10	35
Maximum Named Users	10	30	100	Unlimited
Web API Connections Included	5	5	10	10

Table 5. Named Users and API Connections

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 each Product are firm and cannot be extended, which means that additional items beyond the constraints will not be processed or allowed.

Constraint Maximums	Essentials	Select	Prime	Enterprise
Named Users	10[5]	Unlimited[1]	Unlimited[1]	Unlimited[1]
Lines per transaction	1,000	2,000	2,500	50,000
Serial numbers per document	2,000	4,000	7,500	50,000
Web API Connections	5	10	20	Scalable
API Concurrency[2,3] (Max queue size)	5	10	20	40
Parallelism[2,3]	1	2	3	8
Web API requests per minute[2,3,4]	50	100	150	300
Processing Nodes	0	1	1	Scalable

Table 6. System Constraints

[1] While Acumatica does not limit the number of users who can utilize the system on consumption-based subscriptions, the number of users actively using the system can impact performance and user experience. See product descriptions for recommendations on max number of regular and light users for each product. For named user licensing the number of users is limited to the number of users licensed and should not exceed the limits set for the specific product line, as specified in Table 5.

[2] SaaS reserved resources can increase the noted constraint maximums. (See SaaS Reserved Resources for additional info.)

[3] Processing Nodes can increase the noted constraint maximums. (See Processing Nodes for additional info.)

[4] Many factors can contribute to the actual achievable Web API requests per minute. The numbers shown are at the highest consumption tier available for the selected product, assume basic operations without other activities running, and may require Reserved Resources and 1 or more Processing Nodes.

[5] Essential Users are always Named Users

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

API Concurrency: Concurrency refers to accepting multiple requests from various sources simultaneously and the maximum number of requests that can be accepted and await processing. This is also known as the total number of requests in queue waiting for processing. Higher concurrency allows a higher number of integrations to work more efficiently and reduces the number of denials.

Parallelism: Parallelism refers to how many awaiting requests can be processed simultaneously. While Acumatica can accept many web API requests for processing, only a set number can be processed in parallel. Parallelism can help increase throughput and reduce wait times. The number of requests the system can accept and the number of requests it can process concurrently depend on the product and the number of Processing Nodes licensed. The performance of external integrations requiring an elevated level of activity can be improved by either submitting fewer requests when the system is busy or by adding one or more Processing Nodes.

Web API requests per minute: The amount of time Acumatica takes to process requests can vary depending on the nature of the request. Adding Reserved Resources and additional Processing Nodes improves throughput by providing more resources and parallelism.

Processing Nodes: The maximum number of processing nodes permitted varies by product. Processing Nodes are logically separated application units 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 ensure that the primary Acumatica application unit servicing end user requests remains responsive and free from potential degradation caused by intensive background tasks.

System Recommendations

The system recommendations listed in Table 7 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. Please note that degradation and timeout conditions can occur based on many factors, such as the complexity of the operations being performed, the number of Processing Nodes licensed, reserved resources licensed, integration concurrency, available resources, and other factors. Consult with Acumatica on how to best select licensing options to meet your needs for high volume operations.

Recommended Maximums[1,2]	Essentials	Select	Prime	Enterprise
Inventory items	10,000	50,000	100,000	Scalable[4]
Active fixed assets	1,000	5,000	10,000	20,000
Customers with open balances	1,000	5,000	10,000	20,000
Integrations	3	5	10	20
Users[3]	10	25	100	Scalable[4]
Daily ERP Transactions[5]	2,000	5,000	12,000	Scalable[4]
Daily Commercial Transactions[6]	100	250	750	Scalable[4]

Table 7: System Recommendation Maximums

[1] Exceeding the recommended maximums can result in performance degradation, poor user experience due to slower application responsiveness, and noncompliance with the Acumatica Fair Use Policy. The system may increasingly delay processing of ERP transactions as maximums are exceeded.

[2] SaaS reserved resources, where available, can increase this level. (See SaaS Reserved Resources for additional info.)

[3] The number of active users shown is at the highest consumption tier available for the product. This assumes an even mix of casual vs. regularly active users, as well as a limited number of lightweight integrations and customizations.

[4] Scalable based on Consumption Tier, Reserved Resources, and number of Processing Nodes licensed.

[5] Many factors can contribute to the actual achievable daily ERP Transactions without performance degradation. The numbers shown are at the highest consumption tier available for the selected product, and assume single line non-inventory transactions with minimal number of users and processes utilizing the system.

[6] Many factors can contribute to the actual achievable daily Commercial Transactions without performance degradation. The numbers shown are at the highest consumption tier available for the selected product, and assume single line non-inventory transactions with minimal number of users and processes utilizing the system.

Daily ERP Transactions: The ERP Transaction Volume (ETV) measures the number of save operations performed across all the distinct types of application entities throughout the Acumatica system. Application entities are closely related to data entry screens in Acumatica. When the system needs to save information, it must create or update a set of records related to the operation being performed. This results in at least one ERP transaction for simple operations, but there can be a few more if the save process must create or update multiple application-level entities. ERP transactions occur any time the system needs to write to the database, and not just when a user presses a "save" button. ERP transactions will also result from automated schedules that execute batch processes.

ERP transactions are a relatively good indicator of resource consumption. ERP transactions being processed more than the daily recommendations for the product being used can result in significant performance degradation and lead to poor user experience.

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, or Upgrades. In addition to these major releases, Acumatica delivers regular, minor Updates (typically every 2–8 weeks), which primarily contain high-severity fixes. Acumatica performs due diligence to ensure customizations do not break due to these changes. Acumatica provides two options for SaaS customers to keep their versions up to date: Always Current and FLEX. 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 later. 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.

Always Current

Always Current allows all SaaS customers to automatically receive the benefits of the Always Current Program, which updates their systems to each new Acumatica release, 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 Table 8 below.

Flex Program

SaaS customers using Acumatica Prime or Acumatica Enterprise who need more flexible upgrade timing have the option to purchase the Acumatica Flex Program, which would replace the Always Current Program. With the Flex Program, customers have more options about their upgrade timing and their major releases that they want to adopt, so long as the version is still under current support. Flex is only available for Acumatica Prime, and Acumatica Enterprise. Please Table 8 for more details.

- **Upgrades** contain new features and are released twice per year. Customers on the Always Current Program can choose to 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 released approximately once a month, 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 for Always Current and upon request for Flex.
- **Patches** contain fixes to high severity critical bugs and are released as they are discovered and fixes made available. Patches are automatically applied to customers' instances.

Flex and Always Current Upgrade Options

Each SaaS model has upgrade frequency options that customers can chose from. Please see Table 8 below for details.

Product	Always Current	Flex Program
Essentials	**Upgrades:** Every 6 months within 120 days of release **Updates:** Monthly **Patches**: N/A	N/A
Select	**Upgrades**: Every 6 or 12 months (select which half of year to upgrade) within 120 days of release **Updates**: Monthly **Patches**: N/A	N/A
Prime & Enterprise	**Upgrades**: Every 6 or 12 months (select which half of year to upgrade) within 120 days of release **Updates**: Automatically applied, monthly **Patches**: High severity patches applied automatically as they arise	**Upgrades**: Choose your own upgrade date, ensure date is prior to end-of-life of your current version **Updates**: Available monthly and are applied by request **Patches**: High severity patches applied automatically as they arise

Table 8: Flex and Always Current Upgrade Options

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 Select, Prime, and Enterprise Editions. Whether the customer is using Consumption, or User-based Licensing, the licensing stipulations will be applied to the total consumption or user count across all companies and tenants.

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.

Acumatica SaaS Fair Use Policy

The Acumatica SaaS Fair Use Policy aims to ensure a consistent and reliable experience for Acumatica SaaS customers throughout their subscription term. To achieve this, Acumatica monitors customer resource usage patterns across many factors, including, but not limited to, ERP and commercial transactional counts, API integrations, batch processes, business events, push notifications, import/export scenarios, customizations, 3rd party solutions, and other interfaces. Each of the usage factors and interfaces impacts common consumption metrics such as CPU utilization, query response time, network bandwidth usage, the frequency of web requests, and many others.

Acumatica's monitoring systems can identify instances when consumption levels exceed the levels that Acumatica, at its sole discretion, determines as reasonable. When unaddressed, such excessive consumption levels could result in degradation and reduce overall stability of the shared SaaS service. In such an event, Acumatica will engage with the customer and allow the customer to cure the excessive consumption by either making appropriate changes to its (the customer's) usage patterns that will eliminate the excessive resource consumption or by purchasing an appropriate subscription upgrade, as directed in each case by Acumatica, prior to utilizing its further rights. If the issue is not addressed within fifteen (15) days, Acumatica reserves the right to take appropriate action, such as suspension, non-renewal, or termination.

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. Inventory Control, and Order Management capabilities. This Datasheet lists all included and optional modules for the Distribution Edition.

Symbols used in the chart below: ✓ included   + available   x not available   * geo limitations

Distribution Edition	Essentials	Select	Prime	Enterprise
Acumatica Base System Modules				
Financials	✓	✓	✓	✓
Global Financials	x	+	+	+
Intercompany Accounting	x	+	+	+
Deferred Revenue	x	+	+	+
Contracts (AR Billing for Subscriptions, Integration with CRM Cases)	+	+	+	+
Fixed Assets	+	+	+	+
Acumatica Payments*	✓	✓	✓	✓
Customer Portal for Acumatica Payments	+	+	+	+
Monitoring and Automation	✓	✓	✓	✓
Inventory Control (Requires Order Management)	✓	✓	✓	✓
Distribution Requirements Planning	x	+	+	+
Order Management	✓	✓	✓	✓
Shipping Carrier Integration	+	+	+	+
Warehouse Management	+	+	+	+
Project Accounting	+	+	+	+
Advanced Expense Management*	+	+	+	+
AP Document Recognition*	✓	✓	✓	✓
CRM (SFA , MA)	+	+	+	+
Case Management (requires CRM)	+	+	+	+
Customer Portal (CRM required, price per portal)	+	+	+	+
Salesforce Sync (requires CRM)	x	+	+	+
Exchange Integration	x	x	+	+
Outlook and Gmail plugins	+	+	+	+
Multi-Factor Authentication	✓	✓	✓	✓
Advanced Authentication	x	+	+	+
Included Tenants	+	+	+	+
Acumatica Flex	x	x	+	+
Manufacturing				
Manufacturing Foundation	+	+	+	+
Discrete Manufacturing (can be replaced with eWorkplace Process Man	+	+	+	+
MRP (requires Manufacturing Foundation)	+	x	x	x
Product Configurator	x	+	+	+
Estimating	x	x	x	x
Finite Planning and Scheduling	x	+	+	+
Engineering Change Control	x	x	x	x
Manufacturing Data Collection	x	+	+	+
Arena PLM Integration	x	x	x	x
Commerce				
BigCommerce Integration	+	+	+	+
Shopify Integration	+	+	+	+
Shopify Integration with Shopify POS Pro Integration	+	+	+	+
Amazon Integration	+	+	+	+
Additional Site for Commerce Integration	x	+	+	+
Construction				
Construction Foundation	+	+	+	+
Construction Project Management	+	+	+	+
Property Management (Requires Contracts)	+	+	+	+
Field Service Management	+	+	+	+
Equipment Management (Requires Service Management)	+	+	+	+
Resource Management	+	+	+	+
Resource Management powered by ProjectManager **Marketplace Item	+	+	+	+
Resource Management Quickstart (required for new customer), powered	+	+	+	+
Acumatica Payroll				
Payroll Expansion, additional 50 employees	x	+	+	+
Payroll Expansion, additional 250 employees	x	+	+	+
Localizations				
Canadian Localization	+	+	+	+
French Canadian Language (included with Canadian localization)	+	+	+	+
UK Localization	+	+	+	+
Mexican Localization (ISV)	+	+	+	+
Spanish Language (included with Mexican localization)	+	+	+	+

Retail Edition Datasheet

The Acumatica Retail Edition is ideal for online retailers that need integrated ecommerce capabilities, Financials, Inventory Control, Order Management, and robust ERP functionality. This Datasheet lists all included and optional modules for the Retail Edition.

Symbols used in the chart below: ✓ included + available x not available * geo limitations

Retail Edition	Essentials	Select	Prime	Enterprise
Acumatica Base System Modules				
Financials	✓	✓	✓	✓
Global Financials	x	+	+	+
Intercompany Accounting	x	+	+	+
Deferred Revenue	x	+	+	+
Contracts (AR Billing for Subscriptions, Integration with CRM Cases)	+	+	+	+
Fixed Assets	+	+	+	+
Acumatica Payments*	✓	✓	✓	✓
Customer Portal for Acumatica Payments	+	+	+	+
Monitoring and Automation	✓	✓	✓	✓
Inventory Control (Requires Order Management)	✓	✓	✓	✓
Distribution Requirements Planning	x	+	+	+
Order Management	✓	✓	✓	✓
Shipping Carrier Integration	+	+	+	+
Warehouse Management	+	+	+	+
Project Accounting	+	+	+	+
Advanced Expense Management*	+	+	+	+
AP Document Recognition*	✓	✓	✓	✓
CRM (SFA , MA)	+	+	+	+
Case Management (requires CRM)	+	+	+	+
Customer Portal (CRM required, price per portal)	+	+	+	+
Salesforce Sync (requires CRM)	x	+	+	+
Exchange Integration	x	x	+	+
Outlook and Gmail plugins	+	+	+	+
Multi-Factor Authentication	✓	✓	✓	✓
Advanced Authentication	x	+	+	+
Included Tenants	+	+	+	+
Acumatica Flex	x	x	+	+
Manufacturing				
Manufacturing Foundation	+	+	+	+
Discrete Manufacturing (can be replaced with eWorkplace Process Mar	+	+	+	+
MRP (requires Manufacturing Foundation)	+	+	+	+
Product Configurator	x	+	+	+
Estimating	x	+	✓	✓
Finite Planning and Scheduling	x	+	+	+
Engineering Change Control	x	+	✓	✓
Manufacturing Data Collection	x	+	+	+
Arena PLM Integration	x	x	x	x
Commerce				
BigCommerce Integration	+	+	+	+
Shopify Integration	+	+	+	+
Shopify Integration with Shopify POS Pro Integration	+	+	+	+
Amazon Integration	+	+	+	+
Additional Site for Commerce Integration	x	+	+	+
Construction				
Construction Foundation	+	+	+	+
Construction Project Management	+	+	+	+
Property Management (Requires Contracts)	+	+	+	+
Field Service Management	+	+	+	+
Equipment Management (Requires Service Management)	+	+	+	+
Resource Management	+	+	+	+
Resource Management powered by ProjectManager **Marketplace Item	+	+	+	+
Resource Management Quickstart (required for new customer), powered	+	+	+	+
Acumatica Payroll				
Payroll Expansion, additional 50 employees	x	+	+	+
Payroll Expansion, additional 250 employees	x	+	+	+
Localizations				
Canadian Localization	+	+	+	+
French Canadian Language (included with Canadian localization)	+	+	+	+
UK Localization	+	+	+	+
Mexican Localization (ISV)	+	+	+	+
Spanish Language (included with Mexican localization)	+	+	+	+

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.

Symbols used in the chart below: ✓ included   + available   x not available   * geo limitations

Manufacturing Edition	Essentials	Select	Prime	Enterprise
Acumatica Base System Modules				
Financials	✓	✓	✓	✓
Global Financials	x	+	+	+
Intercompany Accounting	x	+	+	+
Deferred Revenue	x	+	+	+
Contracts (AR Billing for Subscriptions, Integration with CRM Cases)	+	+	+	+
Fixed Assets	+	+	+	+
Acumatica Payments*	✓	✓	✓	✓
Customer Portal for Acumatica Payments	+	+	+	+
Monitoring and Automation	✓	✓	✓	✓
Inventory Control (Requires Order Management)	✓	✓	✓	✓
Distribution Requirements Planning	x	x	x	x
Order Management	✓	✓	✓	✓
Shipping Carrier Integration	+	+	+	+
Warehouse Management	+	+	+	+
Project Accounting	+	+	+	+
Advanced Expense Management*	+	+	+	+
AP Document Recognition*	✓	✓	✓	✓
CRM (SFA , MA)	+	+	+	+
Case Management (requires CRM)	+	+	+	+
Customer Portal (CRM required, price per portal)	+	+	+	+
Salesforce Sync (requires CRM)	x	+	+	+
Exchange Integration	x	x	+	+
Outlook and Gmail plugins	+	+	+	+
Multi-Factor Authentication	✓	✓	✓	✓
Advanced Authentication	x	+	+	+
Included Tenants	+	+	+	+
Acumatica Flex	x	x	+	+
Manufacturing				
Manufacturing Foundation	✓	✓	✓	✓
Discrete Manufacturing (can be replaced with eWorkplace Process Mar	✓	✓	✓	✓
MRP (requires Manufacturing Foundation)	+	✓	✓	✓
Product Configurator	x	+	+	+
Estimating	x	✓	✓	✓
Finite Planning and Scheduling	x	+	+	✓
Engineering Change Control	x	✓	✓	✓
Manufacturing Data Collection	x	+	+	✓
Arena PLM Integration	x	x	x	x
Commerce				
BigCommerce Integration	+	+	+	+
Shopify Integration	+	+	+	+
Shopify Integration with Shopify POS Pro Integration	+	+	+	+
Amazon Integration	+	+	+	+
Additional Site for Commerce Integration	x	+	+	+
Construction				
Construction Foundation	+	+	+	+
Construction Project Management	+	+	+	+
Property Management (Requires Contracts)	+	+	+	+
Field Service Management	+	+	+	+
Equipment Management (Requires Service Management)	+	+	+	+
Resource Management	+	+	+	+
Resource Management powered by ProjectManager **Marketplace Item	+	+	+	+
Resource Management Quickstart (required for new customer), powered	+	+	+	+
Acumatica Payroll				
Payroll Expansion, additional 50 employees	x	+	+	+
Payroll Expansion, additional 250 employees	x	+	+	+
Localizations				
Canadian Localization	+	+	+	+
French Canadian Language (included with Canadian localization)	+	+	+	+
UK Localization	+	+	+	+
Mexican Localization (ISV)	+	+	+	+
Spanish Language (included with Mexican localization)	+	+	+	+

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.

Symbols used in the chart below: ✓ included   + available   x not available   * geo limitations

Construction Edition	Essentials	Select	Prime	Enterprise
Acumatica Base System Modules				
Financials	✓	✓	✓	✓
Global Financials	x	+	+	+
Intercompany Accounting	x	+	+	+
Deferred Revenue	x	+	+	+
Contracts (AR Billing for Subscriptions, Integration with CRM Cases)	+	+	+	+
Fixed Assets	+	+	+	+
Acumatica Payments*	✓	✓	✓	✓
Customer Portal for Acumatica Payments	+	+	+	+
Monitoring and Automation	✓	✓	✓	✓
Inventory Control (Requires Order Management)	+	+	+	+
Distribution Requirements Planning	x	+	+	+
Order Management	✓	✓	✓	✓
Shipping Carrier Integration	+	+	+	+
Warehouse Management	+	+	+	+
Project Accounting	✓	✓	✓	✓
Advanced Expense Management*	+	+	+	+
AP Document Recognition*	✓	✓	✓	✓
CRM (SFA , MA)	+	+	+	+
Case Management (requires CRM)	+	+	+	+
Customer Portal (CRM required, price per portal)	+	+	+	+
Salesforce Sync (requires CRM)	x	+	+	+
Exchange Integration	x	x	+	+
Outlook and Gmail plugins	+	+	+	+
Multi-Factor Authentication	✓	✓	✓	✓
Advanced Authentication	x	+	+	+
Included Tenants	+	+	+	+
Acumatica Flex	x	x	+	+
Manufacturing				
Manufacturing Foundation	+	+	+	+
Discrete Manufacturing (can be replaced with eWorkplace Process Mar	+	+	+	+
MRP (requires Manufacturing Foundation)	+	+	+	+
Product Configurator	x	+	+	+
Estimating	x	✓	✓	✓
Finite Planning and Scheduling	x	+	+	+
Engineering Change Control	x	✓	✓	✓
Manufacturing Data Collection	x	+	+	+
Arena PLM Integration	x	x	x	x
Commerce				
BigCommerce Integration	+	+	+	+
Shopify Integration	+	+	+	+
Shopify Integration with Shopify POS Pro Integration	+	+	+	+
Amazon Integration	+	+	+	+
Additional Site for Commerce Integration	x	+	+	+
Construction				
Construction Foundation	✓	✓	✓	✓
Construction Project Management	+	+	+	+
Property Management (Requires Contracts)	+	+	+	+
Field Service Management	+	+	+	+
Equipment Management (Requires Service Management)	+	+	+	+
Resource Management	+	+	+	+
Resource Management powered by ProjectManager **Marketplace Item	+	+	+	+
Resource Management Quickstart (required for new customer), powered	+	+	+	+
Acumatica Payroll				
Payroll Expansion, additional 50 employees	x	+	+	+
Payroll Expansion, additional 250 employees	x	+	+	+
Localizations				
Canadian Localization	+	+	+	+
French Canadian Language (included with Canadian localization)	+	+	+	+
UK Localization	+	+	+	+
Mexican Localization (ISV)	+	+	+	+
Spanish Language (included with Mexican localization)	+	+	+	+

Professional Services Edition Datasheet

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

Symbols used in the chart below: ✓ included   + available   x not available   * geo limitations

Professional Services Edition	Essentials	Select	Prime	Enterprise
Acumatica Base System Modules				
Financials	✓	✓	✓	✓
Global Financials	x	+	+	+
Intercompany Accounting	x	+	+	+
Deferred Revenue	x	+	+	+
Contracts (AR Billing for Subscriptions, Integration with CRM Cases)	+	+	+	+
Fixed Assets	+	+	+	+
Acumatica Payments*	✓	✓	✓	✓
Customer Portal for Acumatica Payments	+	+	+	+
Monitoring and Automation	✓	✓	✓	✓
Inventory Control (Requires Order Management)	+	+	+	+
Distribution Requirements Planning	x	+	+	+
Order Management	+	+	+	+
Shipping Carrier Integration	+	+	+	+
Warehouse Management	+	+	+	+
Project Accounting	✓	✓	✓	✓
Advanced Expense Management*	x	✓	✓	✓
AP Document Recognition*	✓	✓	✓	✓
CRM (SFA , MA)	x	✓	✓	✓
Case Management (requires CRM)	+	+	+	+
Customer Portal (CRM required, price per portal)	+	+	+	+
Salesforce Sync (requires CRM)	x	+	+	+
Exchange Integration	x	x	+	+
Outlook and Gmail plugins	+	+	+	+
Multi-Factor Authentication	✓	✓	✓	✓
Advanced Authentication	x	+	+	+
Included Tenants	+	+	+	+
Acumatica Flex	x	x	+	+
Manufacturing				
Manufacturing Foundation	+	+	+	+
Discrete Manufacturing (can be replaced with eWorkplace Process Man	+	+	+	+
MRP (requires Manufacturing Foundation)	+	+	+	+
Product Configurator	x	+	+	+
Estimating	x	✓	✓	✓
Finite Planning and Scheduling	x	+	+	+
Engineering Change Control	x	✓	✓	✓
Manufacturing Data Collection	x	+	+	+
Arena PLM Integration	x	x	x	x
Commerce				
BigCommerce Integration	+	+	+	+
Shopify Integration	+	+	+	+
Shopify Integration with Shopify POS Pro Integration	+	+	+	+
Amazon Integration	+	+	+	+
Additional Site for Commerce Integration	x	+	+	+
Construction				
Construction Foundation	✓	✓	✓	✓
Construction Project Management	✓	✓	✓	✓
Property Management (Requires Contracts)	+	+	+	+
Field Service Management	+	+	+	+
Equipment Management (Requires Service Management)	+	+	+	+
Resource Management	+	+	+	+
Resource Management powered by ProjectManager **Marketplace Item	✓	✓	✓	✓
Resource Management Quickstart (required for new customer), powered	+	+	+	+
Acumatica Payroll				
Payroll Expansion, additional 50 employees	x	+	+	+
Payroll Expansion, additional 250 employees	x	+	+	+
Localizations				
Canadian Localization	+	+	+	+
French Canadian Language (included with Canadian localization)	+	+	+	+
UK Localization	+	+	+	+
Mexican Localization (ISV)	+	+	+	+
Spanish Language (included with Mexican localization)	+	+	+	+

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.

Symbols used in the chart below: ✓ included   + available   x not available   * geo limitations

General Business Edition	Essentials	Select	Prime	Enterprise
Acumatica Base System Modules				
Financials	✓	✓	✓	✓
Global Financials	x	+	+	+
Intercompany Accounting	x	+	+	+
Deferred Revenue	x	+	+	+
Contracts (AR Billing for Subscriptions, Integration with CRM Cases)	+	+	+	+
Fixed Assets	+	+	+	+
Acumatica Payments*	✓	✓	✓	✓
Customer Portal for Acumatica Payments	+	+	+	+
Monitoring and Automation	✓	✓	✓	✓
Inventory Control (Requires Order Management)	+	+	+	+
Distribution Requirements Planning	x	+	+	+
Order Management	+	+	+	+
Shipping Carrier Integration	+	+	+	+
Warehouse Management	+	+	+	+
Project Accounting	+	+	+	+
Advanced Expense Management*	+	+	+	+
AP Document Recognition*	✓	✓	✓	✓
CRM (SFA , MA)	+	+	+	+
Case Management (requires CRM)	+	+	+	+
Customer Portal (CRM required, price per portal)	+	+	+	+
Salesforce Sync (requires CRM)	x	+	+	+
Exchange Integration	x	x	+	+
Outlook and Gmail plugins	+	+	+	+
Multi-Factor Authentication	✓	✓	✓	✓
Advanced Authentication	x	+	+	+
Included Tenants	+	+	+	+
Acumatica Flex	x	x	+	+
Manufacturing				
Manufacturing Foundation	x	x	x	x
Discrete Manufacturing (can be replaced with eWorkplace Process Man	x	x	x	x
MRP (requires Manufacturing Foundation)	x	x	x	x
Product Configurator	x	x	x	x
Estimating	x	x	x	x
Finite Planning and Scheduling	x	x	x	x
Engineering Change Control	x	x	x	x
Manufacturing Data Collection	x	x	x	x
Arena PLM Integration	x	x	x	x
Commerce				
BigCommerce Integration	x	x	x	x
Shopify Integration	x	x	x	x
Shopify Integration with Shopify POS Pro Integration	x	x	x	x
Amazon Integration	x	x	x	x
Additional Site for Commerce Integration	x	x	x	x
Construction				
Construction Foundation	x	x	x	x
Construction Project Management	x	x	x	x
Property Management (Requires Contracts)	+	+	+	+
Field Service Management	x	x	x	x
Equipment Management (Requires Field Service Management)	x	x	x	x
Resource Management				
Resource Management powered by ProjectManager **Marketplace Item	+	+	+	+
Resource Management Quickstart (required for new customer), powered	+	+	+	+
Acumatica Payroll				
Payroll Expansion, additional 50 employees	x	+	+	+
Payroll Expansion, additional 250 employees	x	+	+	+
Localizations				
Canadian Localization	+	+	+	+
French Canadian Language (included with Canadian localization)	+	+	+	+
UK Localization	+	+	+	+
Mexican Localization (ISV)	+	+	+	+
Spanish Language (included with Mexican localization)	+	+	+	+

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.