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, Private Cloud Subscription (PCS), and Private Cloud Perpetual (PCP, no longer available for new sales effective April 1, 2022). 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.

Any reference to system or software is a reference to Acumatica ERP software or SaaS subscription, unless stated otherwise. This guide covers the various aspects of Acumatica licensing, and it is important to read the document in its entirety to understand the various aspects of your license. While this document is referred to as the Acumatica Licensing Guide, it also covers Acumatica's SaaS offering. Headings or sections that mention "license" or "licensing" may also apply to a SaaS subscription, 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.

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, as applicable.

SaaS Subscription and Licensing

Keys and Entitlements

Acumatica license keys (activation keys) are used to activate Acumatica products. License entitlements are what you are entitled to use based on the licenses you have acquired.

Overview

Acumatica's SaaS subscriptions and licensing are designed to help small and midsize businesses save money by having to acquire only the licensing and services needed for their business areas. As the organization grows or its needs change, added licenses can be acquired as needed. This makes the power and benefits of an Acumatica solution more affordable for all businesses.

The Acumatica ERP solution is made available through one of three models: Software-as-a-Service (SaaS) Subscription (most popular), Private Cloud Subscription (PCS) Licensing and prior to April 1, 2022 Private Cloud Perpetual (PCP) Licensing. Certain editions may not be available in all licensing and subscription models.

SaaS Subscription allows you to use the SaaS service with non-perpetual rights. The SaaS service includes the following: Acumatica's ERP software, the hardware required to host the software, hosting side Internet connectivity, hosting side firewalls, backups, and all costs associated with managing the server environment and with hosting operations. This model lowers the initial licensing costs, eliminates the costs associated with acquiring and maintaining servers for Acumatica ERP software and hosting infrastructure, and provides you with the flexibility to increase your subscription license as your business grows, or even decrease your license at any renewal term. Improvements, as defined in your subscription agreement, are included with your SaaS subscription, allowing the software and associated infrastructure to be kept up to date with the latest enhancements, patches, updates, and upgrades. The SaaS service generally provides the lowest total cost of ownership, the greatest flexibility for the customer, and the highest service availability. Visit https://www.acumatica.com/acumatica-saas-faq/ for SaaS FAQs.

Private Cloud Subscription (PCS) Licensing allows you to use the software with non-perpetual rights, meaning that you can use the software during the term of your subscription. This model lowers initial licensing costs and provides you with the flexibility to increase subscription license counts as your business grows, or even decrease license counts at any renewal term. Software Updates (as defined in your license agreement) are included with your PCS subscription, allowing you to keep the software up to date with the latest enhancements, patches, and upgrades. You can use PCS licensing when you want to have the ERP solution hosted and managed by your partner or any third party. Alternatively, the software may be deployed on your premises and can be self-managed or managed by your Authorized Acumatica Reseller.

Private Cloud Perpetual (PCP) Licensing allows you to use the software with perpetual usage rights, meaning that you can use the licensed version of the software for as long as you choose. All subject to the terms of Acumatica's End User License Agreement (EULA). Software Maintenance, as defined in your license agreement, may be purchased to receive software updates, which allow customers to keep the software up to date with the latest enhancements, patches, and upgrades.

When an organization is selecting Acumatica, there are two components to consider: the product editions and modules that provide specific product functionality, and the licensing or subscription method. There are additional system and module constraints that are related but not directly tied to licensing that will be covered in this guide.

Product Editions

Acumatica Cloud ERP functionality is delivered as editions that contain a collection of modules that are suited for specific industries and company sizes; additional modules can be selected to fit your specific needs. Here is an overview of the organization size groupings, industries, and module availability that make up the various editions.

Company Size

Small Business

All Small Business Editions (SBE) are designed to meet the needs of smaller organizations and include 5 named users. SBEs can optionally be upgraded to 10 named users (20 named users for General Business Edition). The included modules vary based on the industry edition selected. See below for more information on included and optional modules.

SaaS SBE subscriptions started after June 30, 2020 are automatically enrolled in Acumatica Always Current Program (see page 16 for additional information). Customers who need upgrade date options beyond what is included with our standard process may enroll in Acumatica Flex. For more information, contact your Acumatica partner.

Advanced

All Advanced editions are designed for most 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 below for more information on included and optional modules.

SaaS Advanced editions subscriptions started after April 1, 2022 are automatically enrolled in the Acumatica Always Current Program. Customers who need upgrade date options beyond what is included with our standard process may enroll in Acumatica Flex. For more information, contact your Acumatica partner.

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 below for more information on included and optional modules.

Industry Specific Editions

General Business

For organizations that do not fit into one of Acumatica's industry editions, you can purchase the general business edition. Below is a listing of all included and optional modules for the General Business Editions.

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	☑	☑	☑

Feature	Col1	Col2	Col3
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	◸	□	☑
Upgrade to 10 Named Users (For Small Business Edition)	□	⊠	⊠
Secondary License (Separate DB & Site)	⊠	□	□

Manufacturing Modules

Feature	Col1	Col2	Col3
Manufacturing (Includes BOM, Production Management)	⊠	⊠	⊠
MRP (Required when purchasing Manufacturing, except Small Business)	⊠	⊠	⊠
Product Configurator	⊠	⊠	⊠
Estimating	⊠	⊠	⊠
Planning and Scheduling	⊠	⊠	⊠
Engineering Change Control	⊠	⊠	⊠
Manufacturing Data Collection	⊠	⊠	⊠
Arena PLM Integration	⊠	⊠	⊠

Field Service Modules

Feature	Col1	Col2	Col3
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-Commerce Modules

Feature	Col1	Col2	Col3
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

Feature	Col1	Col2	Col3
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

Feature	Col1	Col2	Col3
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

Distribution

Distribution Editions are ideal for wholesale and distribution organizations that need integrated financials and inventory, as well as robust ERP functionality. Below is a listing of all included and optional modules for Distribution Editions.

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

Distribution 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	◹	☐	☑
Upgrade to 10 Named Users (For Small Business Edition)	☐	☒	☒
Secondary License (Separate DB & Site)	☒	☐	☐
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	◹	◹	◹
MRP (Required when purchasing Manufacturing, except Small Business)	☒	◹	◹
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)	◹	◹	◹

	Small Business	Advanced	Enterprise
Field Service Upgrades: add 10, 50, or 250 Techs	⊠	◹	◹
Equipment Maintenance (Requires Service Management)	☐	☐	☐
Route Management (Limited availability, Requires Service Management)	⊠	◹	◹
Retail-Commerce 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

Retail-Commerce

Retail-Commerce Editions are ideal for Internet retailers that need integrated E-Commerce, advanced financials and inventory capabilities, and robust ERP functionality. Below is a listing of all included and optional modules for Commerce Editions.

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

Retail-Commerce 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	◩	☐	✅
Upgrade to 10 Named Users (For Small Business Edition)	☐	☒	☒
Secondary License (Separate DB & Site)	☒	☐	☐
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	☐	☐	☐
MRP (Required when purchasing Manufacturing, except Small Business)	☒	☐	☐
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-Commerce 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

Manufacturing

Manufacturing Editions are ideal for organizations that need to manage manufacturing processes. Below is a listing of all included and optional modules for Manufacturing Editions.

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

Manufacturing 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	△	□	☑
Upgrade to 10 Named Users (For Small Business Edition)	□	☒	☒
Secondary License (Separate DB & Site)	☒	□	□
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	☑	☑	☑
MRP (Required when purchasing Manufacturing, except Small Business)	△	☑	☑
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-Commerce 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			

	Small Business	Advanced	Enterprise
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

Construction

Construction Editions are ideal construction organizations that need to manage construction projects. Below is a listing of all included and optional modules for Construction Editions.

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

Construction 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)	⊠	☐	☐
Upgrade to 10 Named Users (For Small Business Edition)	☐	⊠	⊠
Secondary License (Separate DB & Site)	⊠	☐	☐
Manufacturing Modules			
Manufacturing (Includes BOM, Production Management)	☐	☐	☐
MRP (Required when purchasing Manufacturing, except Small Business)	⊠	☐	☐

	Col 1	Col 2	Col 3
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-Commerce 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

Some Editions may not be available in all licensing and subscription models. Licenses for additional software that may be required to run Acumatica outside of our SaaS environment, such as Microsoft Windows Server and Microsoft SQL Server, are not included and need to be purchased separately. However, they are not required when using Acumatica's Cloud ERP SaaS Subscription.

Module-Specific Licensing

Advanced Expense Management

Advanced Expense Management includes the ability to automatically create expense receipts from images taken with a mobile phone. This feature is available in English in the US and Canada. 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 are available worldwide.

AP Document Recognition

AP Document Recognition is available in English in the US and Canada. The service includes recognition of 1,000 pages per month with the option to purchase additional pages in packs of 5,000 and 25,000.

Business Card Recognition

Business Card Recognition is available in English in the US and Canada. The service includes recognition of 1,000 cards per month with the option to purchase additional packs of 5,000 cards.

Additional Language Packs

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

Commerce Integration

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

Field Service: Scheduled Resources

Field Service 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 an option to switch to technician-based licensing based on the number of scheduled technicians and vehicles. Contact you Acumatica partner for technician-based options.

Portals

Acumatica Portals enable you to create a portal experience where customers and business partners can access their information, as well as create orders or open cases. An Acumatica Portal can be used as a Customer Portal, B2B Portal, B2B Ordering Portal, Case Management Portal, or a Financials Portal. An individual portal license is required for each company it is used with. Each individual portal license supports one portal website URL. Once the individual portal module is licensed, no additional user access licenses are required for that portal. Other modules may be required to expose certain functionality to the portal.

Additional Processing Nodes

As used at Acumatica, a processing node is an application server that is linked to an Acumatica database. When users log into Acumatica, they are connecting to an application server (we can call it the Primary Processing Node). When there are integrations that produce a significant number of web API requests, adding one or more Additional Processing Nodes can help ensure that the web API load does not impact your Acumatica users experience. Another common use for Additional Processing nodes is for high availability and load-balancing configurations. Additional Processing Nodes are generally used in two primary ways:

1. **To increase performance**, to address two general situations

   Heavy loads from Third-party integrations

   Leaving all users who log into Acumatica on the Primary Processing Node and pointing all third-party integrations to the Additional Processing Node. Heavy processing loads from the third-party integrations do not slow down users.

   Power users running reports, imports, or other processes that create heavy loads

   Leaving all regular users on the Primary Processing Node and having all power users use the Additional Processing Node helps ensure consistent performance for all users. This is especially important for companies that run disproportionately higher volumes in compressed timeframes, like if all invoicing occurs in just a few days per month, rather than distributed over the month. Monthly and daily transaction volumes can deviate by up to 30% from the license parameters before impacting performance, beyond these thresholds a processing node is recommended. The daily transaction volumes

are also expected to be distributed over an approximate 10-hour day, processing daily transaction volumes in more compressed timeframes may warrant the need for a processing node.

Processing nodes can be purchased in various sizes (M, L, X and E) either below or up to the size of the customer's license.

2. **To provide load balancing** (by extension redundancy), using two general configurations

Manual Load Balancing

Have a Primary Processing Node and an Additional Processing Node, each with their own URL, and have users and/or third-party integrations use one of the two. If the processing node someone is using is down, users can simply point to the alternate URL. This is easy to setup and to manage technically but requires a conscious change by the user to switch systems should theirs fail. Additionally, it requires that users are manually load balanced between the two systems.

Automatic Load Balancing

The processing nodes (Primary and Additional) are setup in a cluster, utilizing only one URL, and the users and any third-party integrations use the one URL, the loads are automatically balanced between the two systems by the clustering system. This is more difficult to configure and requires more technical expertise to manage (if outside of Acumatica SaaS environment), but it is seamless and transparent to the users and integrations.

Customers can have many processing nodes, they are not limited to a Primary and one Additional Processing Node (example: there could be one Primary and 4 Additional Processing Nodes). Each Additional processing node will have the same parameters as the Primary Processing Node for the number of Web Services API Users, Concurrent Web Services API Requests, and Web Service Requests per Hour (or Minute). Therefore, this will also contribute to throughput capabilities of the overall system (all processing nodes and the database server).

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 have a different software versions and customizations than the linked production environment. This makes Sandboxes useful for testing upgrades, development, load testing, training, and other purposes.

Sandbox Licensing

Sandboxes can be purchased with a different resource level than their linked production version. Sandbox storage is separate from production database storage and is purchased separately.

Licensing Methods

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

Most customers license the ERP solution using Consumption based Transaction Tiers. Customers who purchased the solution prior to April 1, 2018 may utilize the Consumption based Resource Levels. Acumatica offers User

based licensing for Small Business customers (Named Users) who may not be a good fit for the consumption model (Concurrent Users). Some of the modules listed in the Editions tables above have specific ways they are licensed and are covered below.

Transaction Tiers

Transaction-tier licensing is based on monthly Commercial Transaction Volumes (CTV) and monthly ERP Transaction Volumes (ETV). Table 2 shows the various transaction tiers; higher tiers are also available.

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 1: 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: 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 would be 800.

The ERP Transaction Volume is equal to the total number of times an Acumatica object is created or modified (essentially the same as clicking **Save** on an Acumatica form). It is unlikely that ETV would be reached before CTV are reached under normal use of the software by logged-in users. Since Acumatica is used as a platform, ETV is in place to account for custom development that utilizes the Acumatica platform in a manner that has very few CTV, yet the system is used extensively. (An example is someone creates a rental object to track rental transactions and creates 500 rental transactions per day.)

Customers may purchase additional ERP Transactions per Month without increasing their transaction tier level.

For your organization to remain in compliance with CTV and ETV licensing requirements, your monthly CTV and ETV transaction volumes must not exceed your licensed monthly transaction volume for any three (3) months during a trailing twelve (12) month period.

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 2: Included SaaS Data Storage
(for SaaS subscriptions initially purchased after 4/1/2019)

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

Acumatica Always Current and Acumatica Flex Programs

Acumatica Always Current Program. SaaS customers who receive the benefits of the Always Current Program stay on the current release, reduce upgrade costs, and get the latest features. Customers on the Always Current Program can select different upgrade options as described in the table below.

- **Upgrades** contain new features and are generally published two times 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 needing additional upgrade timing flexibility can purchase Acumatica Flex Program to replace the Always Current Program. The Acumatica Flex Program allows customers with non-certified customizations or ISV products which are not Always Current Certified to select an upgrade date prior to the end-of-life of their current version

Edition	Always Current Upgrade Option
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 3: Always Current Upgrade Options

Resource Levels

If you purchased Acumatica ERP prior to April 1, 2018 and/or are using resource-level licensing, please view the Acumatica Licensing Guide Supplement located at http://www.acumatica.com/agreements.

Named Users

Named user licensing is based on the number of individual users licensed to use the Acumatica 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 our SBE.

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

Concurrent Users

Concurrent user licensing is based on the number of simultaneous users accessing the system at a given time. The number of concurrent users licensed would therefore restrict the system to allow only that number of simultaneous users to log in at any given time (see documentation for details).

If you are on a user-based license and an Acumatica offering is only defined for transaction tier licensing, then the following mapping of user-based licensing to transaction tier licensing shall 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

<div align="center">Table 4: Concurrent User to Transaction Tier Mapping for pricing items with Transaction Tier prices</div>

System Recommendations and Constraints

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 model (SaaS or PCS/PCP). Parameters that can impact system responsiveness are addressed in *System Recommendations for Consumption-Based Licensing*, while those that have strict limitations are addressed in *System Constraints*.

Consumption-Based Subscriptions and Licensing

System Recommendations

The system recommendations listed in Table 5 (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 and there will be no violation of the license agreement.

Transaction Tiers	S1	S2	S3	M1	M2	M3	L1	L2	L3	L4	X1	X2	X3	X4	E1	E2	E3	E4	E5	P1	P2	P3+
System Recommendations																						
Concurrent Users		50			100			250				500				1,000					1,500	>1,500
Daily Commercial Transaction Volume		100			300		500		1,000			2,500			7.5K	10K	15K	20K	25K	35K	60K	>60K
Hourly Commercial Transaction Volume		10			30		50		100			250			750	1K	1.5K	2K	2.5K	3.5K	6K	>6K
Daily ERP Transaction Volume		2K			6K		10K		20K			50K			150K	200K	300K	400K	500K	700K	1M	>1M

<div align="center">Table 5: System Recommendations for Consumption-Based Subscriptions and Licensing</div>

System Constraints

The system constraints listed in Table 6 (below) are additional parameters of the Acumatica license agreement. Acumatica's ERP solution will either provide details of the thresholds that are surpassed or prohibit the user from performing operations that would exceed thresholds. These constraints are necessary to ensure normal system behavior and operation.

Transaction Tiers	S1	S2	S3	M1	M2	M3	L1	L2	L3	L4	X1	X2	X3	X4	E1	E2	E3	E4	E5	P1	P2	P3+
System Constraints																						
Lines per Transaction [1]		1,000			1,500			2,000				2,500				3,000				3,000		>3K
Serial Numbers per Document		2,000			5,000			7,500				10,000				10,000				10,000		>10K
Web Services API Users		10			20			30				40				50				75		>75
Concurrent Web Service Requests [2]		1			3			6				10				20				24		>24
Web Services Requests/ Minute [2]		50			100			150				250				500				600		>600

[1] Project module will allow 2 times the number of transactions to accommodate revenue and cost budget lines. [2] Per processing node based on node tier size

<div align="center">Table 6: System Constraints for Consumption-Based Subscriptions and Licensing</div>

User-Based Subscriptions and Licensing

System Recommendations

The system recommendations listed in 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 and there will be no violation of the license agreement.

Number of Users	1-10	11-25	26-50	51-100	101-250	251-500	501+
System Recommendations							
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 7: System Recommendations for User-Based Subscriptions and Licensing

System Constraints

The system constraints listed in Table 8 (below) are additional parameters of the Acumatica license agreement. Acumatica's ERP solution will either provide details of the thresholds that are surpassed or prohibit the user from performing operations that would exceed thresholds. These constraints are necessary to ensure normal system behavior and operation.

Number of Users	1-10	11-25	26-50	51-100	101-250	251-500	501+
System Constraints							
Lines per Transaction[1]	1,000	1,500	2,000		2,500	3,000	3,000
Serial Numbers per Document	2,000	5,000	7,500		1,000	10,000	10,000
Web Services API Users	10	20	30		40	50	75
Concurrent Web Service Requests [2]	1	3	6		10	20	24
Web Services Requests per Minute [2,3]	50	100	150		250	500	600

1 Project module projects will allow 2 times the number shown to accommodate both revenue and cost budget lines. 2 Per processing node. 3 Exceptions possible for PCS/PCP, depending on hardware configuration; however, Acumatica will not guarantee supportability for performance related issues.

Table 8: System Constraints for User-Based Subscriptions and Licensing

When user-based licensing is utilized, an API user license is used for APIs connections; an example would be when connecting using a Web Services API.

Monitoring of Console and License Compliance

Acumatica provides a License Monitoring Console form that is designed to provide one central location for viewing all license information, and to make it simple for customers to know their license usage. By using this real-world usage data, customers can determine if they need to consider increasing, or even possibly decreasing, their license needs.

The console provides license information, which includes the licensed number of monthly CTV and ETV; the recommended maximums for daily CTV, ETV, and number of users, if applicable; and system constraints for number of inventory items, business accounts, and other factors. For SaaS customers, there is also information regarding data storage sizing. You can see detailed statistics of system resource use by month, and by day, and

view the warnings that have appeared when the system has exceeded the limits for resources specified in your license.

If the system is licensed utilizing transaction tiers, it will continue to operate even if the maximum CTV or ETV for a given license is reached. However, the system will log the information and warnings will be displayed on the License Monitoring Console form. If there are three such violations in any trailing 12-month period, the customer will be required to upgrade to a license tier that will accommodate its transaction volumes.

Tenants

Acumatica comes with the ability to have one tenant or multiple tenants. Within a single tenant, you can have an unlimited number of entities. Entities within a single tenant may share customers, vendors, employees, and the chart of accounts. Whereas customers can decide what elements should be separated or shared between entities in different tenants, such as the chart of accounts, vendors, customers, and employees. Additional Tenant license packs are available for all Acumatica Advanced and Enterprise editions. Whether the customer is using consumption-based or user-based licensing, the licensing will be applied to all entities and tenants. No additional licensing will be required as long as the total consumption or user count across all companies and tenants does not exceed the license limits.

Price Protection

Renewal Caps for SaaS and PCS subscriptions

Renewal prices for Acumatica PCS and SaaS subscriptions will not increase by more than 3% per year for customers who purchased their initial subscription prior to April 1, 2022, and the higher of 3% or the most recent change in the United States Consumer Price Index (US City Average for All Items) for customers who purchased their initial subscription after April 1, 2022 (collectively the Price Cap), as applied to the prices listed on the most current Order Form for these subscriptions; discounts listed on the Order Form will not apply to renewals. The Price Cap will apply as long as the customer complies with the terms of its subscription agreements and any related documents, and as long as 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 this change would require access to a higher-level edition or transaction tier, or an increase in the number of users, then the customer's current discount will be applied pro rata for the remaining initial term, toward the standard list price for this new edition or upgrade in transaction tier or number of users.

Renewal Caps for Software Maintenance (PCP Only)

Renewal prices for Software Maintenance, if listed on your Order Form, will not increase by more than 3% per year (Price Cap) from the price listed on your most current Order Form; discounts listed on the Order Form will not apply to renewals. The 3% cap will apply as long as Software Maintenance is purchased each year with no periods without coverage (that is, as long as it is uninterrupted), and the customer complies with the terms of its license agreements and any related documents.

Product Releases

Acumatica's Product Releases are designed to deliver high quality versions of the product on a predictable schedule allowing customers to stay on the most current release of the product, and at the same time have ample time to preview major upgrades before going into production.

Each year we bundle several enhancements into two major releases. In addition to the 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 its 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. At a minimum, customers should plan to upgrade at least once a year to ensure their version does not reach its retirement date, and to benefit from the additional functionality. With each new major release, Acumatica announces the support period for the release along with its expected retirement date. In most cases, each major release is supported for a period of 20 months before the release is retired.