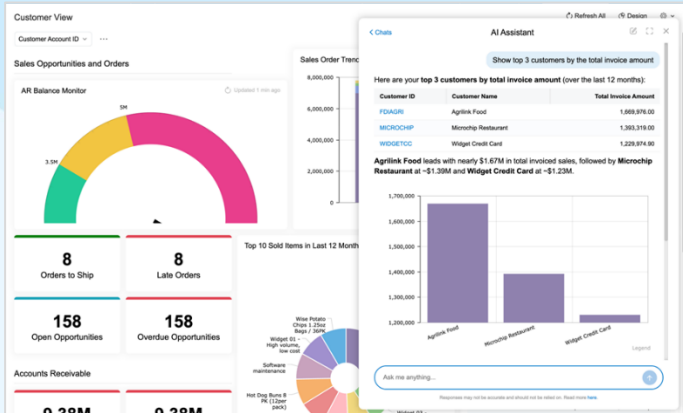




AI Assistant

AI Assistant is a chat interface that enables users to ask questions about their data and receive answers as text, tables, charts, or pivot tables, without writing reports, building queries, or involving IT.

- Ask data questions in plain, natural language
- Build on follow-up questions in persistent threads
- Inherit access rights through Generic Inquiries
- Create dashboard widgets from query results
- Receive answers as tables, charts, or pivots

Key business benefits

- Put AI capabilities directly in the hands of users, with no technical expertise or coding required.
- Catch errors and exceptions before they compound.
- Automate repetitive document processing by letting AI read records, apply your instructions, and write results back.
- Keep sensitive data inside Acumatica with built-in field masking for security control.
- Maintain governance across every AI action with system instructions, controls, and token tracking.

Related resources

- Prepare for AI-Driven Growth Solution Brief > [LEARN MORE](#)
- AI Readiness Checklist for SMBs > [LEARN MORE](#)
- Acumatica's AI-First Product Strategy > [LEARN MORE](#)

Interact with Your Data Like Never Before Using the Acumatica AI Assistant

Bring a natural language interface to all areas of your Acumatica ERP deployment. Empower your team to ask questions about their data and get immediate, accurate answers, turning everyday ERP interactions into fast, informed decisions.

- **Instant, Secure Insights:** Once you configure your Generic Inquiries, getting an answer is as simple as asking a question. The assistant draws exclusively from your organization's actual ERP data, not a general model, so results are always relevant. Users see only what they are authorized to view, with no extra security configuration required.
- **Visual, Actionable Results:** Receive answers as tables, charts, or pivot tables, and save key results as dashboard widgets to keep critical metrics within reach.
- **Persistent, Contextual Conversations:** Maintain multiple conversation threads that persist across sessions. Ask follow-up questions to explore trends, drill into exceptions, and compare results over time through natural conversations.
- **Scalable Intelligence:** Expose any Generic Inquiry to the assistant. As your data configurations grow, so does your capability. The interface is available from anywhere in the application, across all modules and roles.

AI Assistant is designed to meet your team where they already work. Whether your users are in finance, operations, sales, projects, production, or service, they can access consistent, data-driven answers without switching tools or waiting on reports. It is practical intelligence built into the platform, ready to support better decisions every day.

"If the warehouse has low inventory for an item, it is immediately exposed to purchasing to place the order for more. We now have real-time visibility to pertinent data."

—Ben Rothe, GM & CEO, Premier 1 Supplies, LLC

> CUSTOMER STORIES

Natural Language Data Queries

Users ask questions about their ERP data in plain language and receive answers as tables, charts, or pivot tables. When Generic Inquiries are configured, getting an answer requires no report writer, query builder, or separate analytics tool.

Persistent Conversation Threads

AI Assistant maintains context across follow-up questions, letting users explore data progressively within a single conversation. Users can maintain multiple threads, each persisting across sessions, so prior context is always available.

Dashboard Widget Creation

Some query results can be saved as dashboard widgets, turning a useful finding into a reusable view. Widgets surface on existing Acumatica dashboards without requiring a full rebuild.

Inherited Data Security

Defined access rights are inherited from each Generic Inquiry, so users see only the data they are authorized to view. No additional security configuration is required to deploy the assistant.

Generic Inquiry Integration

The assistant works from configured Generic Inquiries, giving teams access to a governed set of data sources. Any Generic Inquiry built in Acumatica can be exposed to AI Assistant, so its scope grows as your organization's data configurations do.

Application-Wide Availability

AI Assistant can be exposed to any role in Acumatica, across every module. Users can ask data questions relevant to their work without leaving the screen they are already on.

Dynamic Voice and Chat Interfaces

Empower your field teams and office staff to execute commands intuitively using natural voice or chat inputs. The assistant translates spoken or typed instructions directly into automated actions within your ERP solution. This capability speeds up daily tasks, improves accessibility, and reduces manual data entry.

Interactive Multiple-Choice Guidance

Simplify complex business processes with an interactive interface that supports multiple-choice actions. The assistant guides users through dynamic workflows where each subsequent step depends on prior outcomes. This ensures your team can make faster, more accurate decisions with minimal training.

Multilingual Conversation Support

Engage users across your global organization with AI Assistant's multilingual chat capabilities. Team members can ask questions and receive answers in their preferred language, removing communication barriers and ensuring every user can access the data insights they need. This makes it easier to scale adoption across regions without requiring separate configurations or additional tools.

The screenshot displays the Acumatica AI Assistant interface. On the left, a 'Customer View' dashboard shows various widgets: 'Sales Opportunities and Orders', 'AR Balance Monitor' (a gauge chart), 'Top 10 Sold Items in Last 12 Months' (a bar chart), 'Orders to Ship' (8), 'Late Orders' (8), 'Open Opportunities' (158), 'Overdue Opportunities' (158), and 'Accounts Receivable' (0.32M). The main chat window on the right shows a conversation with the AI Assistant. The assistant has responded to the query 'List 10 most recent open invoices' with a table of invoice data. Below the chat window, there is a section titled 'AI Assistant Data Processing' which includes a table of data sources and their status.

Reference Nbr.	Customer	Date	Due Date	Amount	Balance	Status
AR015012	USA Bartending School	2025-06-30	2025-07-30	160,000.00	80,000.00	Open
AR014930	Antun's of Westchester	2025-06-30	2025-07-30	2,800.00	2,800.00	Open
AR015019	Artcages	2025-06-30	2025-07-30	33,000.00	33,000.00	Open
AR015022	NY International Beauty School Ltd	2025-06-30				
AR014931	Besttype Image	2025-06-30				
AR014932	Bibimbab Korean Restaurant	2025-06-30				
AR015008	Electronic Importers	2025-06-30				
AR015021	Elevation Computers	2025-06-30				
AR015017	Elite Answering	2025-06-30				
AR015009	Sacramento Industrial Supply	2025-06-30				

Data Source	Site Map Title	Status	Last Upload Date
AP-CashDiscount	Vendor Cash Discount to Take	AI Description Up to Date	5/29/2026 2:36 PM
AP-Checks and Payments	Checks and Payments	AI Description Up to Date	5/29/2026 2:36 PM
AP-UnreleasedDocuments	Unreleased Vendor Docume...	AI Description Up to Date	5/29/2026 2:36 PM
AP-VendorDetails	Vendor Details	AI Description Up to Date	5/29/2026 2:36 PM
AR-Cash Sales	Cash Sales	AI Description Up to Date	5/29/2026 2:36 PM
AR-CreditLimitCustomers	Customers over the Credit L...	AI Description Up to Date	5/29/2026 2:36 PM
AR-CustomerDetails	Customer Details	AI Description Up to Date	5/29/2026 2:36 PM
AR-UnreleasedDocuments	Unreleased Customer Docu...	AI Description Up to Date	5/29/2026 2:36 PM
CA-CashSummary	Cash Summary	AI Description Up to Date	5/29/2026 2:36 PM
CR-BusinessAccounts2018R1	Business Accounts	AI Description Up to Date	5/29/2026 2:36 PM
CR-Campaigns	Marketing Campaigns	AI Description Up to Date	5/29/2026 2:36 PM
CR-Cases2018R1	Cases	AI Description Up to Date	5/29/2026 2:36 PM
CR-Contracts2018R1	Contracts	AI Description Up to Date	5/29/2026 2:36 PM
CR-IncomingEmails	Incoming	AI Description Up to Date	5/29/2026 2:36 PM
CR-Leads2018R1	Leads	AI Description Up to Date	5/29/2026 2:36 PM

Interact with your ERP data as you would with a coworker in an intuitive chat experience embedded within Acumatica.

ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on [LinkedIn](#).