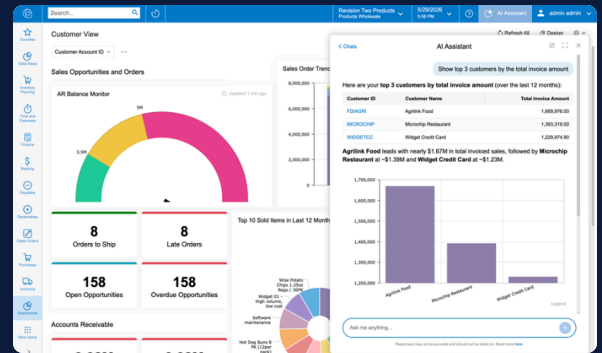


AI Assistant

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



Interact with your data like never before

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

Instant, secure insights. Once Generic Inquiries are configured, getting an answer is as simple as asking. The assistant draws only from your organization's ERP data, and every answer traces back to its exact source. Users see only what they are authorized to view.

Context-aware help. The assistant knows which record you have open, answers "how do I" questions from documentation matched to your version, and tells you plainly what it can and can't do.

Visual, actionable results. Receive answers as tables, charts, or pivot tables, then drag a chart straight from the chat onto a dashboard as a fully configured widget.

Persistent, contextual conversations. Keep multiple threads that persist across sessions and ask follow-ups to explore trends, drill into exceptions, and compare results over time.

Whether your users work in finance, operations, sales, projects, production, or service, they get consistent, data-driven answers without switching tools or waiting on reports.

Key business benefits

Put AI in every user's hands, 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.

The screenshot shows the 'ADVANCED' tab in the Acumatica configuration interface. It includes settings for 'Select Top' (0 Records), 'Records per Page' (0), 'Export Top' (0 Records), and 'Attach Notes To'. There are checkboxes for 'Show Deleted Records' and 'Show Archived Records'. On the right, there are checkboxes for 'Expose via OData', 'Expose to the Mobile Application', 'Detect Anomalies', and 'Expose to AI Assistant' (which is checked). A red box highlights the 'AI Description Up to Date' button.

Related resources

Prepare for AI-Driven Growth Solution Brief

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AI Readiness Checklist for SMBs

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Acumatica's AI-First Product Strategy

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“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

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Capabilities

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

Natural language data queries

Users ask questions about their ERP data in plain language and receive answers as tables, charts, or pivot tables. No report writer, query builder, or separate analytics tool is required.

Persistent conversation threads

AI Assistant keeps context across follow-up questions so users can explore data progressively. Multiple threads persist across sessions, so prior context is always available.

Context-aware answers

The assistant already knows the screen and record a user has open, such as a vendor bill, and answers questions about it without any setup or explanation.

Built-in help agent

Answers “how do I” questions step by step, right in the conversation, drawing on Acumatica documentation matched to the exact version you run.

Traceable, transparent answers

Every answer traces back to its exact source so users can verify it. Asked what it can do, the assistant states plainly what it can help with and where it stops.

Drag-and-drop dashboard widgets

Drag a chart from the chat panel onto a dashboard as a permanent tile, backed by the same Generic Inquiry and filters the assistant used.

Inherited data security

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.

Generic Inquiry integration

The assistant works from a governed set of configured Generic Inquiries. Any Generic Inquiry can be exposed, so its scope grows with your data configurations.

Application-wide availability

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

Chat-driven actions

Field teams and office staff can use natural chat inputs, which the assistant translates into actions in Acumatica, reducing manual data entry.

Multilingual conversation support

Team members ask questions and receive answers in their preferred language, scaling adoption across regions without separate configuration.

The screenshot displays the Acumatica AI Assistant interface. On the left, a dashboard titled 'DETAILS' shows a table with columns: Branch, Inventory ID, Free Item, and Warehouse. The table contains two rows: 'RETAIL' with 'APJAM08' and 'RETAIL' with 'ORANGES'. Above the table are buttons for 'Add Items', 'Add Matrix Items', and 'Add Invoice'. On the right, a chat panel titled 'Show All 5 Widgets' contains instructions: 'To add the widgets to a dashboard, drag them from the chat to the dashboard. Alternatively, create a dashboard first and drag the widgets to it.' Below this, there are two sources: 'Sales Profitability for Last 12 Months' and 'Sales Profitability for Last 12 Months'. The chat panel also includes three buttons: 'Show GoodFood profitability for the last 3 months', 'Show profitability for all customers in the last 6 months', and 'Which item has the highest margin for GoodFood?'. At the bottom of the chat panel is a text input field 'Ask me anything...' and a 'Show Widgets' button.

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](#).