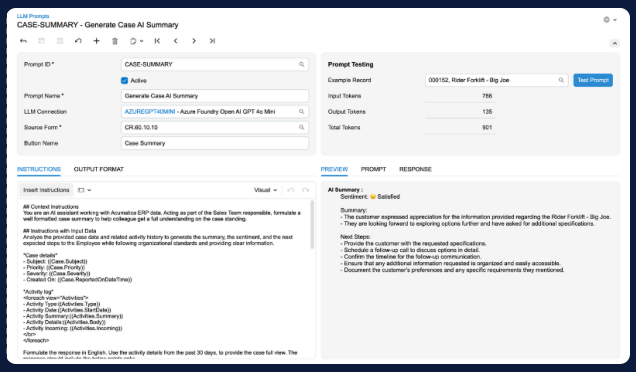
Acumatica
The Cloud ERP

AI Automation

Agents that act on your records

AI Automation lets administrators build agents from plain-text prompts and tools that read, update and validate Acumatica records and run inside business events and workflows, all under governance rules you define once.



From answering questions to taking action

Empower your finance, operations, sales and service teams to work faster and more consistently. AI Automation uses large language models for context-aware judgment, so your ERP can classify cases, standardize unstructured input and update fields without manual rework.

One-step execution

Agents can act on multiple records and run in the background, with no user in front of the screen.

- Read the current record and write results back to header fields or detail lines
- Pull supporting data from other screens through generic inquiries

Automation that starts on its own

Agents run inside the processes you already have.

- Invoke agents from business events, import scenarios and workflows
- Use the value an agent writes back to drive the next step
- Keep routine work moving without a user clicking a button

Secure data control and provider choice

Governance is built in, and you choose the model.

- Mask sensitive fields before data leaves your ERP and restore them in the result
- Connect Anthropic, AWS, Azure or OpenAI
- Available with Acumatica Select, Prime and Enterprise licenses with Modern UI enabled

Key business benefits

Eliminate repetitive updates by letting agents apply instruction-driven changes to records and lines.

Automate end to end by triggering agents from business events, imports and workflows.

Protect sensitive data with field-level masking that keeps PII, pricing and account details inside Acumatica.

Keep AI consistent with default and reusable system instructions applied to every agent.

Control cost and choice by tracking token use and sending data only to the provider you select.

Related resources

Watch the AI Automation Video

> LEARN MORE

AI Readiness Checklist for SMBs

> LEARN MORE

Acumatica's AI-First Product Strategy

> LEARN MORE

> "Automation is going to be the thing that allows us to grow, but what it is really going to do is give us greater efficiency and allow us to focus on important work versus manual work, turning our workforce into knowledge workers as opposed to task workers."
>
> – Zane Zietsman, Chief of Strategy and Digital Officer, Digital Planet

> CUSTOMER STORIES

Capabilities

What administrators can configure, govern and monitor.

AI-driven field updates

Configure actions on supported screens that read the record and write results to document fields in one step, in the screen where the user works.

Agents with tool calling

Agents read the current record and update its detail lines, for example repricing lines from one warehouse or applying a discount to selected lines.

Generic inquiry tools

Agents pull context from other screens through generic inquiries, so decisions draw on live ERP data from across the system, within the access you grant.

Agentic workflows

Business events, import scenarios and automation workflows can invoke an agent, and the value it writes back drives the next step.

Multiple automations per document

Configure several independently triggered automations per document type, each with its own prompt, target fields and instructions.

Pre-built agent library

Ready-to-use prompts include Case Summary, Closure Notes, Opportunity Summary, Customer Reply Refinement and Stock Item Description. Use them as is or tailor the tone.

Built-in agent testing

Test against a sample record and review the exact prompt and response before activating an automation for end users. Processing logs record provider-reported input, output and total tokens per test.

Data masking with full restore

Designated fields are replaced with placeholders before the model sees them, and real values are restored in the response.

Default and reusable system instructions

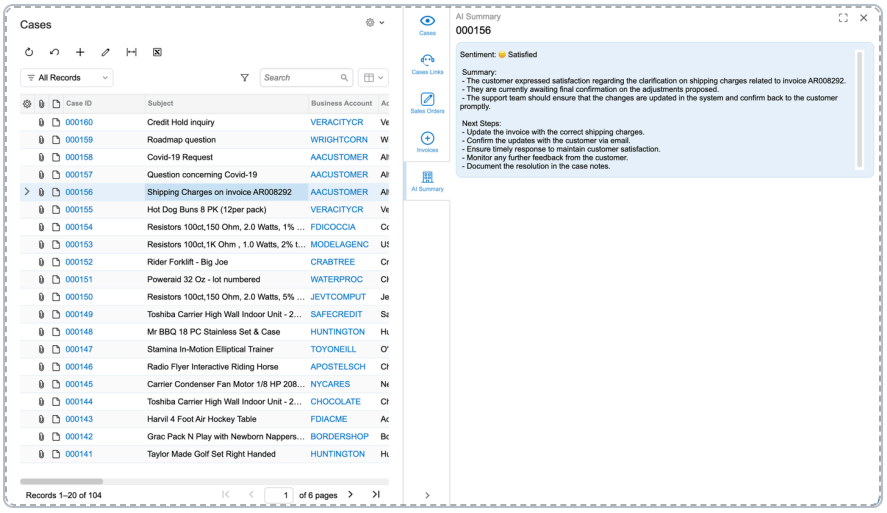
Built-in execution-rules and data-masking instructions are added to every new agent. Define governance rules, output formats and tone once, then attach them to any automation so new agents inherit the baseline.

Bring-your-own-LLM support

Choose Anthropic, AWS, Azure or OpenAI. Acumatica manages data collection, masking, agent execution and response handling.

AI Automation History and usage warnings

AI Automation History records each agent run with token information per run.



Leverage system instructions and pre-built prompts to automatically summarize support case sentiment using Acumatica's native AI Automation capabilities.

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**.

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