Acumatica Integration Documentation For Corfix

Heuristyc
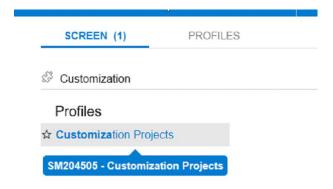
Quick Start
EXT-1860

Introduction:

The integration between Corfix and Acumatica facilitates seamless data synchronization, enhancing communication and operational efficiency between both systems. By configuring the appropriate parameters, preparing data, and processing synchronization tasks, this integration ensures an accurate and smooth workflow.

Customization Package Deployment and License Activation

Before configuring the integration, it is crucial to ensure that the Corfix customization is correctly installed in Acumatica.

Follow these steps to publish the customization package and activate the license:

1. **Log in** to Acumatica using an administrator account.

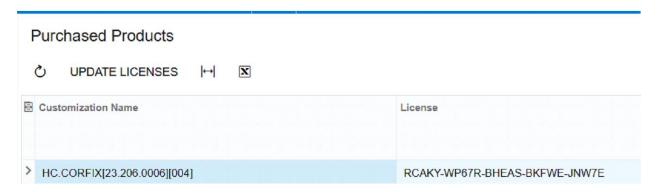2. Navigate to **System Management > Customization > Customization Projects (SM204505)**.

3. **Import** the Corfix customization package.

4. **Select and Publish** the Corfix customization package.

License Verification

5. Once published, go to the **Purchased Products** screen to confirm that the license is active.

Customization Name	License
HC.CORFIX[23.206.0006][004]	RCAKY-WP67R-BHEAS-BKFWE-JNW7E

6. If the license is inactive, enter the activation key provided by the vendor.

Initial Configuration

In the **Corfix Preferences** screen, to ensure a smooth and accurate data import from Corfix to Acumatica, the following fields are required. Below is a description of each field and its purpose:

- **Base URL**: The URL for the Corfix Service.
- **Username:** The Username required to access the Corfix API.
- **Password:** The Username required to access the Corfix API.
- **Company**: The identifier for your Acumatica company.
- **Entities**: Define which entities will be synchronized.
    - Enable or disable synchronization for each entity as necessary.
- **Project Template:**
  Defines a standard structure for new projects, automatically inheriting predefined tasks, financial settings, and default task used when importing time from the Corfix platform. Ensures consistency across imported projects and minimizes manual setup.
- **Project Numbering Sequence:**
  Automatically assigns unique project IDs based on a predefined sequence, ensuring consistency and preventing duplicate entries.
- **Employee Class:**
  Categorizes employees into predefined groups (e.g., full-time, part-time, contractors) to streamline payroll processing and HR management.
- **Workgroup:**
  Specifies the group an employee belongs to within the Acumatica organization.
  Required for employees to log time in the Employee Activities screen.
- **Department:**
  Identifies the employee's organizational division (e.g., Finance, HR, IT, Engineering), assisting in reporting.
- **Employee Numbering Sequence:**
  Assigns unique employee IDs automatically, ensuring consistent identification across the system.
- **Earning Types:**
  Determines the type of earnings applied when entering time in the Employee Time Activities screen:
    - **Earning Type:** Defines the base pay rate for regular work hours.
    - **Overtime Earning Type:** Applies the appropriate pay rate for overtime hours.
    - **Double Earning Type:** Specifies the pay rate for double-time hours, such as holiday work.
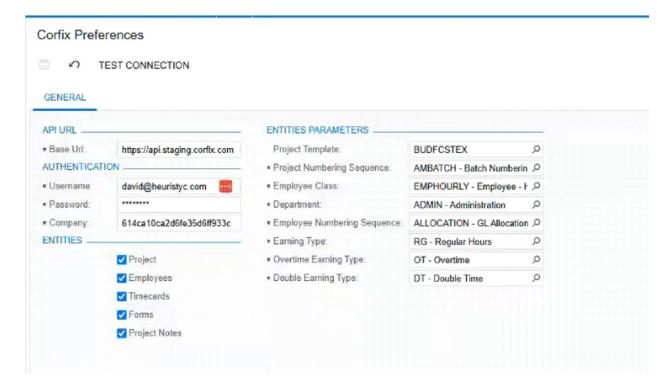
Corfix Preferences

⊟ ↩ TEST CONNECTION

GENERAL

API URL

∗ Base Url:	https://api.staging.corfix.com

AUTHENTICATION

∗ Username:	david@heuristyc.com ⋯
∗ Password:	∗∗∗∗∗∗∗∗
∗ Company:	614ca10ca2d6fe35d6ff933c

ENTITIES

- ☑ Project
- ☑ Employees
- ☑ Timecards
- ☑ Forms
- ☑ Project Notes

ENTITIES PARAMETERS

Project Template:	BUDFCSTEX 🔍
∗ Project Numbering Sequence:	AMBATCH - Batch Numberin 🔍
∗ Employee Class:	EMPHOURLY - Employee - ⊦ 🔍
∗ Department:	ADMIN - Administration 🔍
∗ Employee Numbering Sequence:	ALLOCATION - GL Allocation 🔍
∗ Earning Type:	RG - Regular Hours 🔍
∗ Overtime Earning Type:	OT - Overtime 🔍
∗ Double Earning Type:	DT - Double Time 🔍

By correctly configuring these fields, your system will operate efficiently, ensuring accurate payroll processing and structured project management in Acumatica.

Data Preparation

Before beginning synchronization, data needs to be prepared. This process is managed in the **Corfix Process Data** screen, where users can select the entities to prepare. Since the entities to be processed depend on your configuration, you will see the option to "Select entity(s) to prepare" rather than listing specific entities.

Follow these steps to prepare data for synchronization:

1. Select the entities you wish to prepare.
2. Click **Process** or **Process All**.
3. Confirm that the records appear in the list of data ready for synchronization.

Synchronization Processing

Once data has been prepared, synchronization is performed in the **Corfix Process Data** screen.

Follow these steps to synchronize data:

1. Select the records you wish to synchronize.
2. Click **Process** to initiate synchronization.
3. Verify that the records are successfully reflected in Corfix.

Important: Please note that not all entities support bidirectional synchronization. Some entities only allow data to be pulled from Corfix to Acumatica. Below is a summary of entity synchronization behavior:
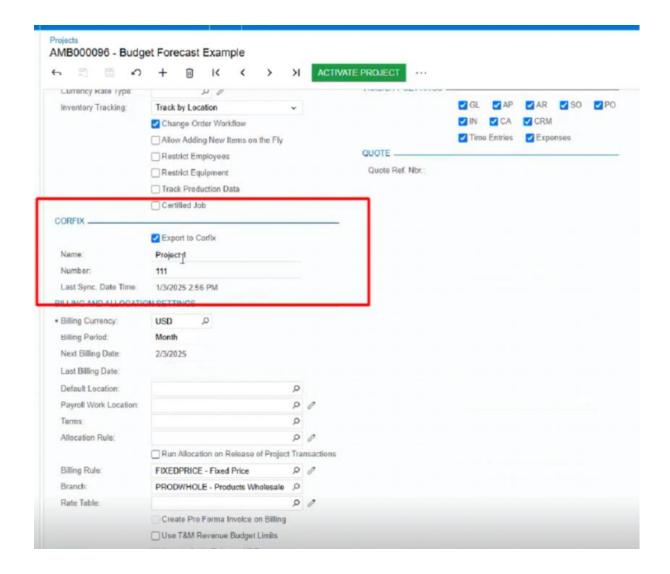
- **Bidirectional (Acumatica ↔ Corfix):**
    - Projects
    - Employees
- **Unidirectional (Corfix → Acumatica):**
    - Forms
    - Notes
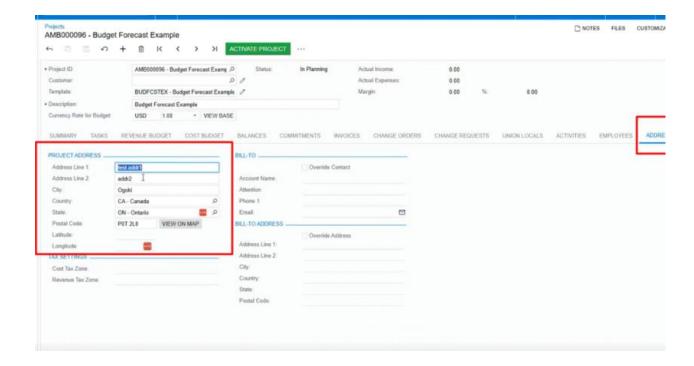   - Employee Time Activities

Verification of Synchronized Data

To ensure that data synchronization has been completed correctly, verification steps should be performed in both Acumatica and Corfix:
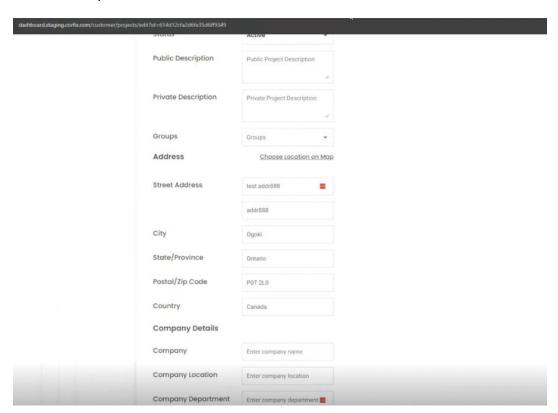
Follow these steps to verify the synchronized data:

1. **In Acumatica:** Navigate to the relevant screen of the synchronized entity and confirm that the data has been properly updated. For example, go to the **Projects screen** as shown below.
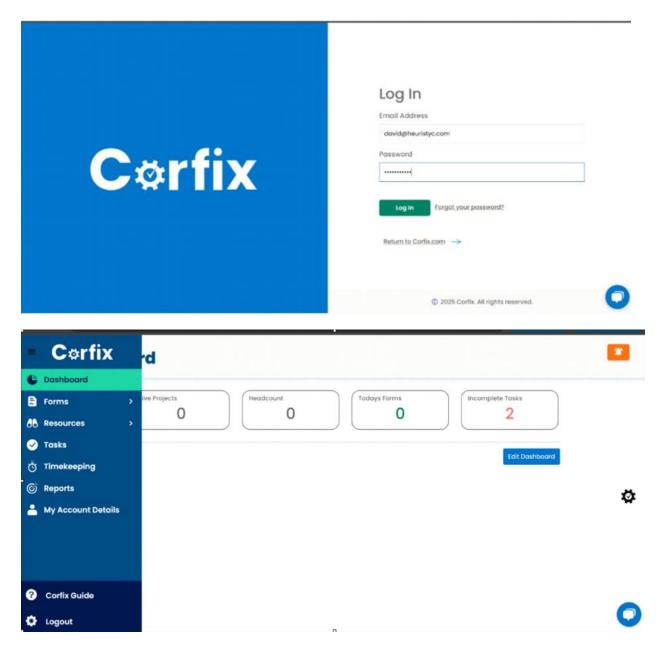
Projects
AMB000096 - Budget Forecast Example

↩   🖫   🖫   ↻   +   🗑   I<   <   >   >I   **ACTIVATE PROJECT**   ...

Currency Rate Type:	◌ ⬚			
Inventory Tracking:	Track by Location ▼			

☑ Change Order Workflow

☐ Allow Adding New Items on the Fly

☐ Restrict Employees

☐ Restrict Equipment

☐ Track Production Data

☐ Certified Job

CORFIX ──────────────────────────

☑ Export to Corfix

Name:	Project1
Number:	111
Last Sync. Date Time:	1/3/2025 2:56 PM

BILLING AND ALLOCATION SETTINGS

• Billing Currency:	USD ◌
Billing Period:	Month
Next Billing Date:	2/3/2025
Last Billing Date:	
Default Location:	◌
Payroll Work Location:	◌ ✎
Terms:	◌
Allocation Rule:	◌ ✎
	☐ Run Allocation on Release of Project Transactions
Billing Rule:	FIXEDPRICE - Fixed Price ◌ ✎
Branch:	PRODWHOLE - Products Wholesale ◌
Rate Table:	◌ ✎
	☐ Create Pro Forma Invoice on Billing
	☐ Use T&M Revenue Budget Limits

Right panel:

☑ GL   ☑ AP   ☑ AR   ☑ SO   ☑ PO

☑ IN   ☑ CA   ☑ CRM

☑ Time Entries   ☑ Expenses

QUOTE ──────────────────────────────

Quote Ref. Nbr.:

2. **In Corfix:** Search for the synchronized records and verify that the information is accurate and up to date.
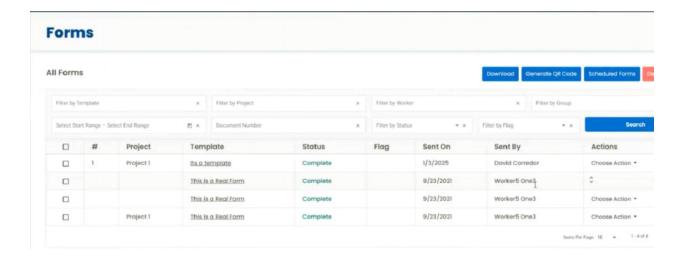
Verification in Corfix

To ensure synchronization accuracy in Corfix, follow these steps:

1. **Log in to Corfix** using your administrator credentials.
2. **Search for synchronized records** by using the search functionality.
3. **Confirm that the information is correct** and matches the data in Acumatica.

Common Issues and Solutions

Here are some common issues you may encounter and their solutions:

- **Records do not synchronize:**
  - **Cause**: The parent entity has not been synchronized.
  - **Solution**: Synchronize the parent entity first and then retry the process.
- **Errors in forms without a linked project:**
  - **Cause**: Mandatory data is missing in Acumatica.
  - **Solution**: Review and complete the required information in Acumatica.
- **Connection issues with the Corfix API:**
  - **Cause**: Incorrect API key or connectivity issues.
  - **Solution**: Verify the API key in Corfix Preferences and test the connection again.

Additional Features and Configurations

Here are some additional features that enhance your integration experience:

- **Auto-assignment of workgroups:**
  - The system now automatically assigns workgroups when importing employee records. This ensures a more efficient categorization of employees.
- **Data import and sequential processing:**
  - Data import now supports sequential processing, ensuring that records are processed in a logical order to avoid inconsistencies.
  - Additionally, the system has been improved to continue processing even if the record state does not exist in Acumatica. This ensures smoother data management and prevents interruptions when importing data from Corfix.

Find below a table that shows the specific fields from Corfix and their corresponding mappings in Acumatica. This should help you locate the relevant forms and sections within both systems:

Fields Mapping Table:

Entity	Corfix UI	Acumatica UI
Projects	Projects> Selected Project> Project Details> Project Name	Projects screen> Summary Tab> Corfix Section> Name
	Projects> Selected Project> Project Details> Project Number	Projects screen> Summary Tab> Corfix Section> Number
	Projects> Selected Project> Project Details> Start Date	Projects screen> Summary Tab> Project Properties Section> Start Date
	Projects> Selected Project> Project Details> Status	Projects screen> Header Section> Status
	Projects> Selected Project> Project Details> Public Description	Projects screen> Header Section> Description
	Projects> Selected Project> Project Details> Street Address	Projects screen> Addresses Tab> Project Address Section> Address Line 1
	Projects> Selected Project> Project Details> Street Address Complement	Projects screen> Addresses Tab> Project Address Section> Address Line 2
	Projects> Selected Project> Project Details> City	Projects screen> Addresses Tab> Project Address Section> City
	Projects> Selected Project> Project Details> Country	Projects screen> Addresses Tab> Project Address Section> Country
	Projects> Selected Project> Project Details> State/Province	Projects screen> Addresses Tab> Project Address Section> State
	Projects> Selected Project> Project Details> Postal/Zip Code	Projects screen> Addresses Tab> Project Address Section> Postal Code
Employees	Workers> Selected Worker> Worker Details> FirstName + LastName	Employees screen> General Tab> Corfix Section> Name
	Workers> Selected Worker> Worker Details> Employee Number	Employees screen> General Tab> Corfix Section> Number
	Workers> Selected Worker> Worker Details> First Name	Employees screen> General Tab> Contact Info Section> First Name
	Workers> Selected Worker> Worker Details> Middle Name	Employees screen> General Tab> Contact Info Section> Middle Name
	Workers> Selected Worker> Worker Details> Last Name	Employees screen> General Tab> Contact Info Section> Last Name
	Workers> Selected Worker> Worker Details> Phone Number	Employees screen> General Tab> Contact Info Section> Phone 1
	Workers> Selected Worker> Worker Details> Personal Phone	Employees screen> General Tab> Contact Info Section> Phone 2
	Workers> Selected Worker> Worker Details> Personal Email	Employees screen> General Tab> Contact Info Section> Email
	Workers> Selected Worker> Worker Details> Date Of Birth	Employees screen> General Tab> Personal Info Section> Date Of Birth

Entity	Corfix UI	Acumatica UI
Project Forms	Forms> Selected Form> Forms Details> Actions> View	Projects screen> Attached Files
Project Notes	Project Notes> Title	Projects screen> Activities Tab> Grid Lines with Note type> Summary
	Project Notes> Selected Note> Notes	Projects screen> Activities Tab> Grid Lines with Note type> Body
	Project Notes> Selected Note> View	Projects screen> Activities Tab> Grid Lines with Note type> Attached files on the activity
Timecards	Timekeeping> Timecards Details> Worker	Employee Time Activities screen> Header Section> Employee
	Timekeeping> Project	Employee Time Activities screen> Header Section> Project
	Timekeeping> Timecards Details> Info	Employee Time Activities screen> Grid Section> Description

This documentation provides a comprehensive guide to successfully implementing and using the Corfix-Acumatica integration. Should you have any questions or require further assistance, please do not hesitate to contact our support team.