

Customer Relationship Management Training Guide

C100 Customer Relationship Management

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Introduction

This course introduces the basic functionality of the Customer Management module of Acumatica ERP. The course is based on a set of examples intended for different groups of users, such as marketing personnel, salespersons, and support specialists. The course consists of lessons that guide you step by step through the basics of the configuration and use of the Customer Management module. You will start from the very basis of registering new leads in the system, and then move to managing the qualification process, running marketing campaigns, nurturing contacts, and tracking sales opportunities. Finally, you will learn to manage service issues, which includes creating cases and tracking related activities.

After you complete the course, you will have an understanding of how to manage your customer relationships by using Acumatica ERP.

How to Use This Course

You will start learning how to use the Customer Management module of Acumatica ERP with very simple business processes. To complete the course:

1. Complete the [Course Prerequisites](#).
2. Complete the lessons in the order in which they are presented.

The course begins with the *Company Story* topic that explains the business scenario in which you are going to use Acumatica ERP in the lessons. Each lesson consists of steps that outline the procedures you are completing and describe the related concepts you are learning. At the end of each step, under the *Related Links* section, you can find links to detailed information about the concepts and forms used in this step. At the end of each lesson, the *Additional Information* article provides links to additional concepts that you might be interested in but that are outside of the scope of the course.



All the links refer to the documentation available on our Partner Portal <http://partner.acumatica.com/> (login required). The same documentation is included in the Acumatica ERP instance and can be found under the **Help** menu.

3. Complete the course assessment on Acumatica University.

Course Prerequisites

To complete this course, you need an understanding of the general principles of customer relationship management (CRM), including leads and opportunities, marketing campaigns and mailing lists, support service cases, and financial documents, such as invoices and sales orders.

You need to have an active Gmail account (either personal or created specifically for training purposes) that you will set up as the system email account.

To go through this course, you need to perform the following actions:

1. [Deploy an out-of-the-box instance](#) of Acumatica ERP that will be used by a single company (see the deployment parameters below).
2. [Restore a snapshot](#) into the deployed instance.

Setting the Parameters to Deploy an Acumatica ERP Instance for the Training Course

The course requires an Acumatica ERP 4.20.0723 instance. On the **Company Setup** screen of the Acumatica Framework Configuration Wizard, specify only one company with no data inserted into the database by setting the following parameters:

- **Login Company Name:** MyCompany
- **New:** Selected
- **Insert Data:** Empty
- **Parent Company ID:** 1
- **Visible:** Selected

Restoring a Snapshot

Before you begin the restore procedure, make sure that you have downloaded the snapshot package file. To restore the snapshot, proceed as follows:

1. On the **Enable/Disable Features** (CS.10.00.00; **Configuration > Common Settings > Licensing**) form, click **Enable** on the toolbar to activate the default set of features. (You do not have to first select any additional features.)
2. On the **Snapshots** tab of the **Companies** (SM.20.35.20; **System > Management > Manage > Companies**) form, click **Import Snapshot** on the table toolbar.
The **Upload Snapshot Package** dialog box opens.
3. Click **Browse**, find and select the *MyCompanyCRMBasic.zip* file, and then click **Upload**.
A row with the snapshot data appears in the table.
4. Select the snapshot, and click **Restore Snapshot** on the form toolbar.
5. In the **Restore Snapshot** dialog box, click **OK**.
6. Log off, and then log back in to make user that the site map has been updated.

It takes a moment for the company snapshot to be restored. After the snapshot has been restored, the company has the following configuration:

- The following features are enabled: *Organization, Customer Management, Finance, Misc, and Notification Module*.
- One branch is created: *MYCOMPANY*.
- One actual ledger is created: *ACTUAL*.

- In the chart of accounts, the minimum required accounts are configured.
- All financial periods for year 2014 are active.
- The General Ledger module is configured and ready for use.
- The Cash Management module is configured and ready for use with the following cash accounts available:
 - *Cash on Hand*, whose payment method is *CASH*
 - *Regular Checking Account*, whose payment method is *CHECK*
- The Accounts Payable module is configured and four vendors are added.
- The Accounts Receivable module is configured and four customers are added.
- Non-stock items defining various services can be used; they all have a base price of 60 USD per hour. Also, the LABOREXP non-stock item can be used for labor expenses.
- The following credit terms are defined: *Net 30 days* and *3/7, n/30*.
- One lead assignment map and two import scenarios are added.
- Required dashboards and generic inquiries are configured.
- The company tree is configured.
- The minimum required number of employees are added.

Company Story

In this course, you will simulate the process of customer relationship management used by a small consulting company, MyCompany. This company is a single business entity that has no branches or subsidiaries and is located in one city in the United States.

MyCompany provides organizations with consulting services in such areas as the following: budgeting, financial analysis, financial strategies, forecasting, performance improvement, pre-audit support, risk management, and turnaround management.

MyCompany needs to handle a large number of customers, both current and potential, to maximize sales opportunities. All MyCompany customers can be divided into the following two types:

- End customers: Organizations that use MyCompany's services.
- Referral partners: Partner organizations that endorse MyCompany's services.

Potential customers of each type should be analyzed and processed differently, in accordance with the qualification process adopted by the company.

In pursuit of new potential customers, the marketing department of MyCompany generates a host of leads from various sources: It uses a marketing automation tool that yields lists of uncategorized leads; it purchases lists of leads from third parties; it receives direct phone calls and emails from leads attracted by marketing campaigns or referrals; finally, the company's web site invites any user who is interested in the offered services to fill in a form, which results in yet more leads. Thus, organizing information in a meaningful manner is among the company's highest priorities.

Furthermore, MyCompany needs to facilitate the process of assigning leads to telemarketing staff for qualification. Because telemarketing employees exhibit various degrees of competence, and each employee is responsible for just a particular area of business, at first all leads get sorted by specific criteria, and after that an appointed employee processes only those leads that can be related to his or her area of knowledge.

During qualification, some leads may show interest in the offered services—this will make them qualified prospects; others may express their readiness to buy immediately—such leads will become qualified opportunities; yet others might appear to be unprepared for any conversation at the moment or not quite interested in the current range of MyCompany's services—such leads will be put aside for the time being, and marketing employees will contact them again in a few days (or when the range of services is sufficiently expanded). In the latter case, it might be a challenge to keep track of all these leads and to contact them again in time.

To increase repeated sales and to nurture the leads who are not yet ready to buy, MyCompany needs to be able to mass-email regular newsletters and special offers. Also, MyCompany runs frequent marketing campaigns to promote its services, and it is important that the company could estimate the efficiency of these campaigns—for instance, it needs to know how many new leads have been generated as a result of a particular campaign.

By and large, MyCompany aims to create as many opportunities as possible, and then bring these opportunities to actual sales. On its way to becoming a closed deal, an opportunity goes through different stages, and each stage can be characterized by a certain probability that the opportunity will result in sales. The company wants to improve traceability of opportunities so that the chief sales officer could easily collect all relative data from sales representatives and estimate future revenue based on sales probabilities for a particular financial period.

Finally, MyCompany has a support team that needs to handle customer requests without delays and on a high professional level. Support specialists want to be able to quickly access any registered case, route it to the person that can best address the issue, and keep customers informed of the progress of their service request.

In this course, you will use the Customer Management module of Acumatica ERP to help MyCompany perform all these tasks with considerable ease and efficiency.

Customer Relationship Management in Acumatica ERP

Customer relationship management (CRM) systems help business owners organize information to maximize new leads, repeat sales, improve customer service, cut costs, and integrate information from external sources.

In Acumatica ERP, the Customer Management module plays the role of a full-featured CRM system. With the Customer Management module, your marketers can perform the following tasks (see Lessons 2 to 4):

- Import lists of leads of any origin by using import scenarios
- Automatically assign leads for qualification to appropriate employees by using assignment maps
- Keep track of important tasks and activities by using automatic notifications
- Classify leads and contacts in a most meaningful manner by using classes and attributes
- Monitor the progress that leads make through the qualification process by using customized dashboards and inquiries
- Quickly convert leads to confirmed contacts, prospects, or opportunities
- Nurture leads by running marketing campaigns and sending personalized emails in bulk
- Estimate the efficiency of your marketing campaigns by processing email responses

By using the Customer Management module, the Sales Department can perform the following tasks (see Lesson 5):

- Classify opportunities by using classes and attributes
- Assign opportunities to appropriate sales persons
- Prepare initial proposals
- Update proposals while negotiating prices and discounts
- Convert contacts to prospect business accounts that can be converted to customers
- Create sales orders and invoices based on opportunities
- Monitor performance of opportunity owners
- Estimate future revenue for each financial period

Finally, the Customer Management module enables support specialists to complete the following tasks (see Lesson 6):

- Register new cases in the system, which includes manual entry and automatic creation of cases as a result of incoming mail processing
- Assign cases to most appropriate specialists
- Process and resolve cases
- Register associated activities
- Release cases, which results in invoicing related customers
- Monitor support efficiency

The Customer Management module is tightly integrated with the General Ledger, Accounts Receivable, Email, and Communication modules. You can also configure its interaction with other modules, such as Distribution, Project Management, Time & Expenses, or Contract Management (see the diagram below).

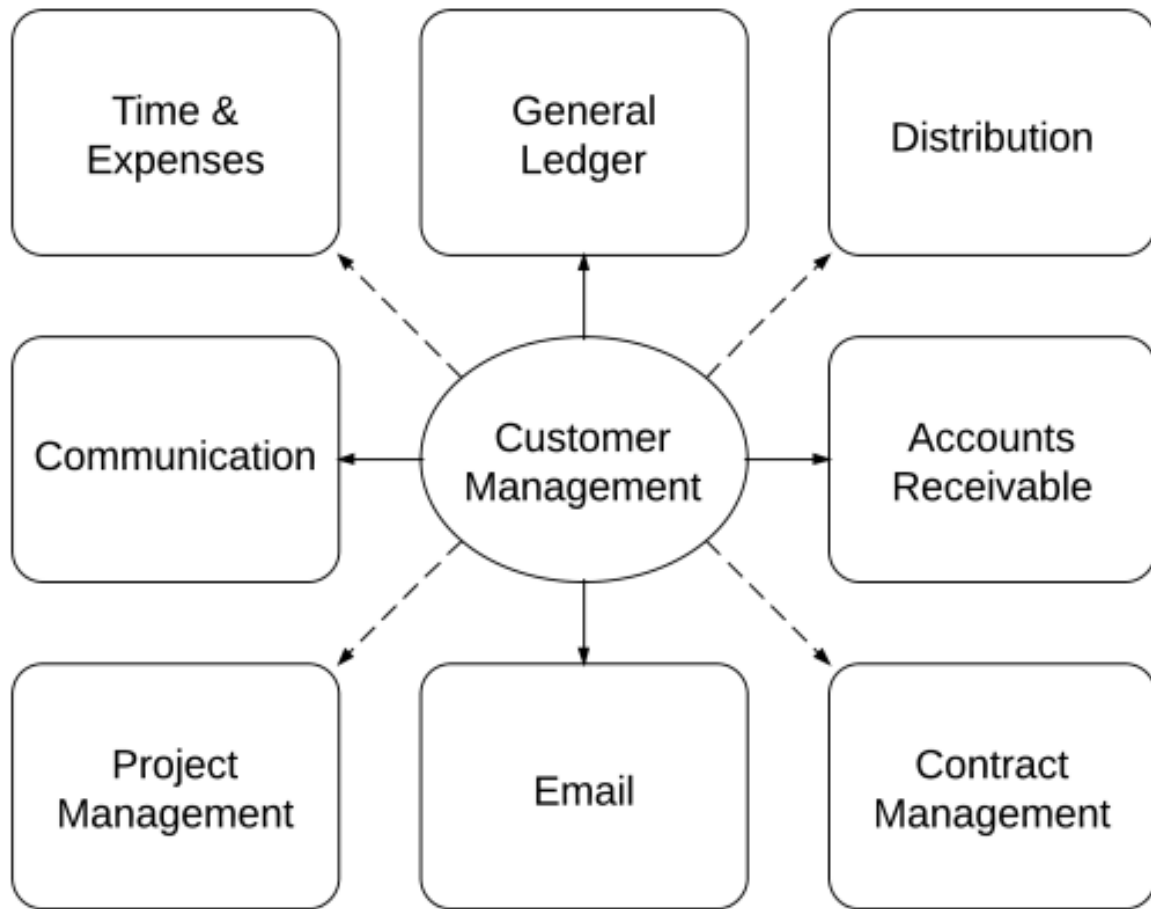


Figure: Customer Management in Acumatica ERP

Lesson 1: Initial Configuration

In Acumatica ERP, a company represents a business unit of an organization that uses certain features of the Acumatica ERP instance. Normally, if you want to start using the Customer Management module, you have to activate the *Customer Management* feature on the **Enable/Disable Features** (CS.10.00.00) form. However, the snapshot that you have restored for MyCompany has been pre-configured so that you could start using the Customer Management module immediately.

Still, you need to adjust the company's configuration so that it best fits MyCompany's needs. In this lesson, you will perform the following tasks:

1. Prepare for meaningful classification of your records by creating classes and attributes (see [Step 1.1: Defining Attributes and Classes](#)).

In Acumatica ERP, a class is a group of records—such as leads, opportunities, business account, or cases—that share at least one common characteristic. In this course, you will create two lead classes: one for potential end customers (that is, organizations that are interested in MyCompany's services), and the other for potential referral partners (that is, partner organizations that endorse MyCompany's services). Then, you will create similar classes for business accounts. Finally, you will create two opportunity classes: one for direct sales, and the other for partner sales.

For each class, you can specify a number of attributes. An attribute is a quality or characteristic (for instance, age or industry) that gives your company specific information that will help it promote its services to potential customers. The attributes that you will define in this lesson will be used in all classes to distinguish between organizations of various sizes and the kinds of services that your company can provide.

2. Configure the system email account (see [Step 1.2: Configuring the System Email Account](#)).

In order to use the automatic notification functionality, as well as to be able to send and receive emails when you work with the Customer Management module (for example, as a part of the lead nurturing process), you need to configure the outgoing and incoming email servers; this involves knowing the names of the servers and their server ports.

Lesson Objectives

In this lesson, you will learn the basic configuration steps required for work with the Customer Management module. You will do the following:

- Define classes and attributes for effective classification of your records
- Configure the system email account

Step 1.1: Defining Attributes and Classes

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. *Define attributes* that will be used in classes.
2. *Define two lead classes.*
3. *Define two business account classes.*
4. *Define two opportunity classes.*

1. Define Attributes for Lead Classes

To define the attributes that you will use in lead classes, open the **Attributes** (CS.20.50.00; **Configuration > Common Settings > Common Settings > Attributes**) form and do the following:

1. Click **Add New Record** on the form toolbar, and in the **Attribute ID** box, type `ORGSIZE` to create an attribute that will describe an organization's size.
2. For the `ORGSIZE` attribute, specify the respective values from the table below.
3. Click **Save** on the form toolbar to save the attribute to the database.

Similarly, create the `INTERESTED` attribute, whose values are also shown in the following table.

Attribute ID	Attribute Description	Control Type	Value ID	Value Description	Sort Order
ORGSIZE	Organization size	Combo	SMALL	1-100 employees	1
			MEDIUM	100-500 employees	2
			LARGE	Over 500 employees	3
INTERESTED	Interested in	Multi Select Combo	STRATEGY	Financial strategies	4
			RISKMGMT	Financial risk management	5
			IMPROVE	Performance improvement	8
			BUDGET	Budgeting	1
			FORECAST	Forecasting	2
			ANALYSIS	Financial analysis	3
			PREAUDIT	Pre-audit support	6
			TURNRND	Turnaround management	7
OTHER	To follow up	9			

The *Combo* control type indicates that you will select an attribute value in a drop-down combo box. With the *Multi Select Combo* control type, you can select multiple values in a drop-down box by selecting check boxes. In the **Sort Order** column, you type the numbers that define the order in which attribute values will be listed in the drop-down combo box. If you do not want to define your own order, leave this column empty—the **Value ID** values will then be displayed in alphabetical order.

2. Define Lead Classes

To create a lead class for potential end customers, do the following:

1. Open the **Contact & Lead Classes** (CR.20.70.00; **Organization > Customer Management > Configuration > Setup > Contact & Lead Classes**) form.
2. On the form toolbar, click **Add New Record**, and then, in the Summary area, specify the following information (refer to the screenshot below):
 - **Class ID:** ENDCUST
 - **Description:** End customers
 - **Active:** Selected
 - **Internal:** Selected

The **Internal** check box indicates, when selected, that the class is hidden from Self-Service Portal users, and only internal users can use it.

3. On the **Details** tab, specify the following information (as shown in the screenshot below):
 - **Default Workgroup:** *Marketing 1*
 - **Copy Ownership from Lead to Business Account:** Selected
 - **Copy Ownership from Lead to Opportunity:** Selected

All new leads of the class will have the workgroup specified by default.

The selected check boxes indicate that business accounts and opportunities converted from a lead of this class will inherit the lead's owner, if an owner has been specified for the lead.

The screenshot shows the 'Contact & Lead Classes' form. At the top, there is a toolbar with icons for back, refresh, save, add, delete, and navigation. The form fields are as follows:

- * Class ID:** ENDCUST (with a search icon) Active Internal
- Description:** End customers
- Details** (selected) / Attributes
- Data Entry Settings:**
 - Default Source:** (empty dropdown)
 - Default Workgroup:** Marketing 1 (with a search icon)
 - Default Owner to Creator
 - Default Workgroup to Default Owner Workgroup
- Convert Lead Settings:**
 - Copy Ownership from Lead to Business Account
 - Copy Ownership from Lead to Opportunity
- Email Settings:**
 - Default Email Account:** (empty search field)

Figure: ENDCUST lead class

4. On the **Attributes** tab, do the following:
 - a. Click **Add Row** on the table toolbar, and then, in the **Attribute ID** column, select the *ORGSIZE* attribute.
 - b. Similarly, click **Add Row**, and select the *INTERESTED* attribute in the **Attribute ID** column.
5. Click **Save** on the form toolbar to save the class information to the database.

On the same form, create another class, for potential referral partners, as follows:

1. On the form toolbar, click **Add New Record** and then, in the Summary area, specify the following information (as shown in the screenshot below):
 - **Class ID:** REFPART
 - **Description:** Referral partners
 - **Active:** Selected
 - **Internal:** Selected
2. On the **Details** tab, select the following check boxes (see the screenshot below):
 - **Default Workgroup:** Marketing 2
 - **Copy Ownership from Lead to Business Account**
 - **Copy Ownership from Lead to Opportunity**

« ↻ Contact & Lead Classes ☆

* Class ID:

Description:

Data Entry Settings

Default Source:

Default Workgroup:

Default Owner to Creator
 Default Workgroup to Default Owner Workgroup

Convert Lead Settings

Copy Ownership from Lead to Business Account
 Copy Ownership from Lead to Opportunity

Email Settings

Default Email Account:

Figure: REFPART lead class

3. On the **Attributes** tab, do the following:
 - a. Click **Add Row** on the table toolbar, and then, in the **Attribute ID** column, select the *ORGSIZE* attribute.
 - b. Similarly, click **Add Row**, and select the *INTERESTED* attribute in the **Attribute ID** column.
4. On the form toolbar, click **Save** to save the class information to the database.

When specifying an attribute, you can mark the attribute as required by selecting the **Required** check box. If you do so, the user must specify a value for this attribute for each new lead of the class in order to save the lead record.

3. Define Business Account Classes

To create a business account class for end customers, do the following:

1. Open the **Business Account Classes** (CR.20.80.00; **Organization > Customer Management > Configuration > Setup > Business Account Classes**) form.
2. On the form toolbar, click **Add New Record**, and then, in the Summary area, specify the following information:
 - **Business Account Class ID:** ENDCUST

- **Description:** End customers
- **Internal:** Selected

The **Internal** check box indicates, when selected, that the class is hidden from Self-Service Portal users, and only internal users can use it.

3. In the grid, add the following attributes: *ORGSIZE* and *INTERESTED*.
4. On the form toolbar, click **Save** to save the class information to the database.

On the same form, create another class, for potential referral partners, as follows:

1. On the form toolbar, click **Add New Record**, and then, in the Summary area, specify the following information:
 - **Business Account Class ID:** *REFPART*
 - **Description:** *Referral partners*
 - **Internal:** Selected
2. In the grid, add the following attributes: *ORGSIZE* and *INTERESTED*.
3. On the form toolbar, click **Save** to save the class information to the database.

When specifying an attribute, you can mark the attribute as required by selecting the **Required** check box. If you do so, the user must specify a value for this attribute for each new business account of the class in order to save the record.

4. Define Opportunity Classes

To create an opportunity class for direct sales, do the following:

1. Open the **Opportunity Classes** (CR.20.90.00; **Organization** > **Customer Management** > **Configuration** > **Setup** > **Opportunity Classes**) form.
2. On the form toolbar, click **Add New Record**, and then, in the Summary area, specify the following information:
 - **Opportunity Class ID:** *DIRECT*
 - **Description:** *Direct sales*
 - **Internal:** Selected

The **Internal** check box indicates, when selected, that the class is hidden from Self-Service Portal users, and only internal users can use it.

3. On the **Attributes** tab, add the following attributes: *ORGSIZE* and *INTERESTED*.
4. On the form toolbar, click **Save** to save the class information to the database.

On the same form, create another class, for partner sales, as follows:

1. On the form toolbar, click **Add New Record**, and then, in the Summary area, specify the following information:
 - **Opportunity Class ID:** *PARTNER*
 - **Description:** *Partner sales*
 - **Internal:** Selected
2. On the **Attributes** tab, add the following attributes: *ORGSIZE* and *INTERESTED*.
3. On the form toolbar, click **Save** to save the class information to the database.

When specifying an attribute, you can mark the attribute as required by selecting the **Required** check box. If you do so, the user must specify a value for this attribute for each new opportunity of the class in order to save the record.

Related Links

[Classes and Attributes](#)

[Attributes \(CS.20.50.00\)](#)

[Contact & Lead Classes \(CR.20.70.00\)](#)

[Business Account Classes \(CR.20.80.00\)](#)

[Opportunity Classes \(CR.20.90.00\)](#)

Step 1.2: Configuring the System Email Account

In this step, you will use a Gmail account (either personal or created specifically for training purposes) to be set up as the system email account in Acumatica ERP. You will perform the following tasks, which are described in detail in the following sections:

1. [Create a new email account](#)
2. [Set up the default email account](#)
3. [Create the Send and Receive Email schedule](#)

1. Create a New Email Account

To create a new email account that will be used as the default system account in Acumatica ERP, on the **System Email Accounts** (SM.20.40.02; **Configuration** > **Email** > **Manage** > **System Email Accounts**) form, create a new record and do the following:

1. In the **Account Name** box, type `Admin` to create an administrative email account.
2. In the **Email Address** and **Reply Address** boxes, type the name of your personal Gmail account (for example, `sample.name@gmail.com`).
3. On the **Servers** tab, specify the following settings (see the screenshot below):
 - **Incoming Mail Protocol:** `Pop3`
 - **Outgoing Mail Server:** `smtp.gmail.com`
 - **Group Mails:** `0`
 - **Username:** The name of your personal Gmail account (for example, `sample.name`)
 - **Password:** The password to your Gmail account

<< ↻ **System Email Accounts** ☆

[Save] [Refresh] [Add] [Clipboard] [Trash] [Back] [Left] [Right] [Forward]

Email Account ID: <NEW>

* Account Name: admin

* Email Address: [.....]@gmail.com

Reply Address: [.....]@gmail.com

Servers | **Advanced Settings** | Incoming Mail Processing | Content

Server Information

Incoming Mail Protocol: Pop3

Root Folder (on server):

Incoming Mail Server:

* Outgoing Mail Server: smtp.gmail.com

Group Mails: 0

Logon Information

Username: [.....]

Password: *****

Figure: Server settings of the system email account

4. On the **Advanced Settings** tab, specify the settings (as shown in the screenshot below):
- **My outgoing server requires authentication:** Selected
 - **Log on using:** Selected
 - **Username:** The name of your personal Gmail account
 - **Password:** The password to your Gmail account
 - **My outgoing server validates From field:** Selected
 - **Incoming server port (POP3/IMAP):** 995
 - **Incoming server requires encrypted connection (SSL):** Selected

- **Outgoing server port (SMTP):** 587
- **Outgoing server encrypted connection:** *TLS*

The screenshot shows the 'Advanced Settings' tab for a system email account. The 'Security' section is expanded, showing the following options:

- My outgoing server requires authentication
- Log on using
- Username: [.....]
- Password: [*****]
- My outgoing server validates From field

The 'Server Port Numbers' section is also expanded, showing the following settings:

- Incoming server port (POP3/IMAP): 995
- Incoming server requires encrypted connection (SSL)
- Outgoing server port (SMTP): 587
- Outgoing server encrypted connection: TLS

Figure: Advanced settings of the system email account

5. On the form toolbar, click **Save**, and then click **Test** to test your email account settings. When the process completes successfully, a green check mark appears next to the **Actions** menu.

2. Set Up the Default Email Account

To make the email account you have just created the default system account in Acumatica ERP, do the following:

1. Open the **Email Preferences** (SM.20.40.01; **Configuration > Email > Configure > Email Preferences**) form.
2. In the **Default Email Account** box, select your Gmail address.
3. Click **Save** on the form toolbar to save the changes.

Now your email account will be used as the default system account. All emails sent on behalf of Acumatica ERP will be sent from this address.

3. Create the Send and Receive Email Schedule

In Acumatica ERP, you can schedule the process of sending and receiving emails to run every 5 minutes. On the **Send and Receive Email** (SM.50.70.10; **Configuration** > **Email** > **Schedule** > **Send and Receive Email**) form, do the following:

1. In the **Action** box, select *Send/Receive All*.
2. On the form toolbar, click **Schedules** > **Add**, as shown in the screenshot below.

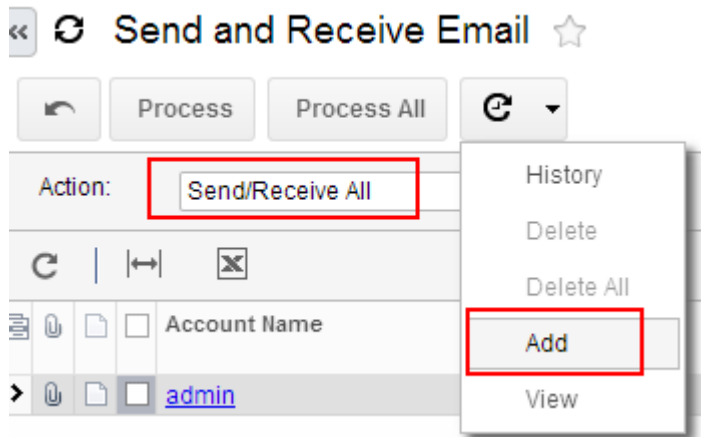


Figure: Add option of the Schedules menu

The **Automation Schedules** (SM.20.50.20) form opens in a pop-up window.

3. In the Summary area of the **Automation Schedules** form, specify the following settings (see the following screenshot):
 - **Screen ID:** *Send and Receive Email*
 - **Description:** *Send and Receive Email Schedule*
 - **Active:** Selected
 - **No Execution Limit:** Selected
 - **Starts On:** Current date
 - **No Expiration Date:** Selected

Automation Schedules Notes Files Customization

Save & Close [Undo] [Add] [Delete] [Previous] [Next] View Screen

* Screen ID: Send and Receive Email	Execution Limit: 0	<input checked="" type="checkbox"/> No Execution Limit
Schedule ID: <NEW>	Executed: 0 Times	
* Description: Send and Receive Email Schedule	* Starts On: 6/10/2014	<input checked="" type="checkbox"/> No Expiration Date
* Action Name: Process All	Expires On:	
<input checked="" type="checkbox"/> Active	Last Executed On:	

Figure: Summary area settings

4. On the **Dates** tab, specify the following settings (as shown in the screenshot below):
 - **Schedule Type:** *Daily*
 - **Next Execution Date:** Current date

- **Every** (in the **Daily** section): 1 Day(s)

The screenshot shows the 'Dates' tab with the following settings:

- Schedule Type:** Daily
- * Next Execution Date:** 6/10/2014
- By Financial Period:** Every: 1 Period(s), Start of the Period selected.
- Weekly:** Every: 1 Week(s), Sunday selected.
- Monthly:** Every: 1 Month(s), On Day selected, 1st, Sunday.
- Daily:** Every: 1 Day(s)

Figure: Dates tab

5. On the **Hours** tab, in the **Every** box, type 00:05, as the screenshot below illustrates.

The screenshot shows the 'Hours' tab with the following settings:

- Starts On:** [Empty]
- Stops On:** [Empty]
- Every:** 00:05
- * Next Execution Time:** 11:29 AM

Figure: Hours tab

6. On the **Filter Values** tab, specify the following settings (as shown in the screenshot below):
 - **Active:** Selected
 - **Field Name:** Action
 - **Is Relative:** Cleared
 - **Value:** Send All
 - **Ignore Error:** Cleared

Active	* Field Name	Is Relativ	* Value	Ignore Error
<input checked="" type="checkbox"/>	Action	<input type="checkbox"/>	Send All	<input type="checkbox"/>

Figure: Filter Values tab

7. Click **Save & Close** on the **Automation Schedules** form toolbar to apply these schedule settings.

Related Links

[Email Management](#)

[Incoming Mail Processing](#)

[System Email Accounts \(SM.20.40.02\)](#)

Email Preferences (SM.20.40.01)
Send and Receive Email (SM.50.70.10)

Additional Information

You can use the following information for additional reading, but these concepts are outside of the scope of this course.

Companies

Multiple companies, or *tenants*, can work independently from one another in the same instance of Acumatica ERP, or they can be organized into a hierarchy and have shared data access. In this course, you have deployed the Acumatica ERP instance for use by the only company, and therefore have defined just one company in the instance configuration. For more information about companies and multi-company configuration, see [Support of Multiple Companies](#) in the Acumatica ERP User Guide.

Branches

If a company has a hierarchical structure, you can enable multi-branch support in the system and create multiple branches for company headquarters, subsidiaries, and locations, depending on your reporting needs. All branches share some financial data—that is, they share the chart of accounts and use the same base currency and financial periods. The branches can operate independently or use inter-branch transactions that are automatically generated by the system. Multi-branch support is allowed in Acumatica ERP if the corresponding feature is enabled. In this course, the company has the only branch. For more information on the use of multiple branches, see [Multiple Branch Support](#) in the Acumatica ERP User Guide.

Lesson Summary

In this lesson, you have completed the initial configuration of Acumatica ERP, which enables you to use the Customer Management module according to your company's needs. You have learned how to define classes and attributes in the system. Also, you have set up the system email account. Now the Customer Management module is ready for use—that is, you can register in the system all leads that originate from various sources, and then qualify them according to the qualification process adopted by your company.

Lesson 2: Lead Registration

MyCompany uses multiple sources of leads, such as purchased lists, lists of web contacts, and phone inquiries. These newly generated leads look like a lot of unsorted records that need to be put in order and somehow classified before being assigned to telemarketers for qualification. Thus, you need a tool which you can use to store all records in a single place and organize them. For these purposes, you can use the Customer Management module of Acumatica ERP.

However, first of all, you have to register all new leads in the system. In Acumatica ERP, you can do this in any of the following ways:

- Entering leads manually one at a time on the **Leads** (CR.30.10.00) form
- Importing lists of leads (for instance, purchased lists) by using import scenarios on the **Import by Scenario** (SM.20.60.36) form
- Importing leads automatically by enabling integration with web services on the **Web Services** (SM.20.70.40) form
- Creating leads automatically by activating the functionality of incoming mail processing on the **System Email Accounts** (SM.20.40.02) form

In this lesson, you will perform the following tasks:

1. Import a purchased list by using an import scenario (see [Step 2.1: Importing a Purchased List](#)).

Regardless of the source from which the list originates, the import procedure is similar for all lists: you create an import scenario, and then apply it to a particular list.



The same procedure can be used when a company switches to using Acumatica ERP: Lists of leads can be exported from the previously used CRM application and then imported from the resulting files to Acumatica ERP.

Acumatica ERP supports import from MS Excel and from .csv files. For different lists, you have to use different import scenarios. For this task, you will use a predefined import scenario and a list with the *Purchased List* value specified as its source.

2. Create a schedule to import on a regular basis lists generated by a marketing automation tool (see [Step 2.2: Importing Lists Generated by a Marketing Automation Tool](#)).

A marketing tool is capable of generating large lists of leads of rather dubious quality. To minimize the time that you might spend on importing these leads, you will organize the process as follows: Every day, a new list will be uploaded to an ftp server, and then the list will be automatically imported by schedule.

For this task, you will use another predefined import scenario and a list with the *Other* value specified as its source.

3. Enter leads manually (see [Step 2.3: Registering Leads Manually](#)).

MyCompany receives phone calls and emails from leads attracted by advertisements or referrals. You will learn how to register such leads manually.

Lesson Objectives

In this lesson, you will learn how you can register leads that originate from various sources. You will do the following:

- Import a purchased list of leads
- Set up scheduled import of leads generated by a marketing automation tool
- Enter leads manually

Step 2.1: Importing a Purchased List

In this step, you will use a predefined import scenario to import a purchased list of leads. (Before you begin, find the *PurchasedLeads.xlsx* file that is provided with this course.) On the **Import by Scenario** (SM.20.60.36; **System > Integration > Process > Import by Scenario**) form, proceed as follows:

1. In the **Name** box, select the *Import Leads from Purchased List* scenario.
2. On the form title bar, click **Files** (see the screenshot below).

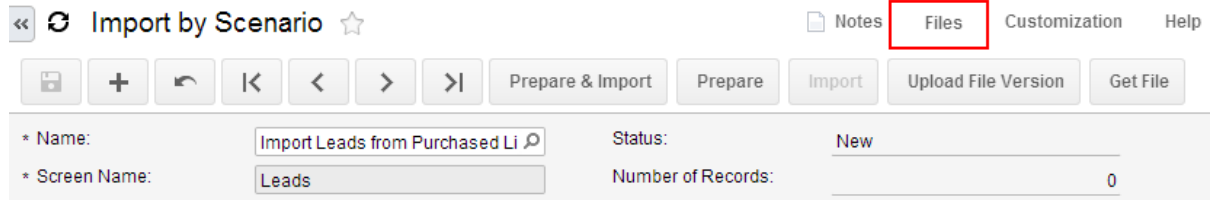


Figure: The button to open the Files dialog box

The **Files** dialog box opens.

3. On the toolbar, click **Add File** and upload the *PurchasedLeads.xlsx* file.
After the file has been successfully uploaded, close the **Files** dialog box.
4. On the form toolbar, click **Prepare**.

The grid on the **Prepared Data** tab becomes populated with the data from the uploaded file, with each row corresponding to a lead. In the Summary area of the form, in the **Number of Records** read-only box, you can see the total number of listed records. The system has changed the status of the scenario to *Prepared*.

At this stage, you can select which records in the list you want to exclude from import by clearing the respective check boxes in the **Active** column.

5. On the form toolbar, click **Import** to initiate import of the selected records.

A green check mark appears on the form toolbar when the process is successfully completed, and the imported records are marked by selected check boxes in the **Processed** column of the grid. The system changes the status of the scenario to *Processed*.

All the imported records have their source specified as *Purchased List*.

Related Links

[Import by Scenario \(SM.20.60.36\)](#)

Step 2.2: Importing Lists Generated by a Marketing Automation Tool

In this step, you will schedule periodic execution of a predefined import scenario to import on a regular basis lists generated by a marketing automation tool. In MyCompany, an updated list is uploaded to an ftp server every day; you will imitate this process by putting the *MarketingLeads.xlsx* file, that is provided with this course, in a shared folder on your local machine. You will perform the following tasks, each of which is described in detail in the following sections:

1. [Configure synchronization](#) between an existing file that contains a list of leads and an external file that will be regularly updated by the marketing automation tool used by MyCompany.
2. [Schedule periodic execution of an import scenario](#).

Configure File Synchronization

Before you begin, put the *MarketingLeads.xlsx* file in a shared folder on your local machine. On the **Import by Scenario** (SM.20.60.36; **System** > **Integration** > **Process** > **Import by Scenario**) form, proceed as follows:

1. In the **Name** box, select the *Import Leads from Marketing Automation Tool* scenario.
2. On the form title bar, click **Files**.
The **Files** dialog box opens.
3. On the toolbar, click **Add File** and upload the *MarketingLeads.xlsx* file.
4. After the file has been successfully uploaded, click **Edit** next to the name of the file (see the screenshot below).

The **File Maintenance** form opens.



Figure: The Edit link to open the File Maintenance form

5. On the **Synchronization** tab, specify the following information and save the changes:
 - **Synchronize:** Selected
 - **Synchronization Type:** *Shared folder*
 - **Path:** Network path to the *MarketingLeads.xlsx* file in the shared folder (including the name of the file)
 - **Login:** Your network login in the following format: `<username>@<domain>`
 - **Password:** Your network password
 - **Synchronize Folder Content:** Cleared
6. On the form toolbar, click **Synchronization** > **Import File**.

A green check mark appears on the form toolbar when the synchronization process is successfully completed.

Schedule Lead Import

On the **Import Scenarios** (SM.20.60.35; **System** > **Integration** > **Schedule** > **Import Scenarios**) form, proceed as follows:

1. In the Selection area of the form, in the **Operation** box, select *Prepare & Import*.
2. In the grid, select the check box next to the *Import Leads from Marketing Automation Tool* scenario.
3. On the form toolbar, click **Schedule** > **Add**.

The **Automation Schedules** (SM.20.50.20) form opens in a pop-up window.

4. In the Summary area of the **Automation Schedules** form, specify the following settings (see the following screenshot):
 - **Screen ID:** *Import Scenarios*
 - **Description:** *Import Leads from Marketing Automation Tool Schedule*
 - **Active:** Selected
 - **No Execution Limit:** Selected
 - **Starts On:** Current date
 - **No Expiration Date:** Selected

The screenshot shows the 'Automation Schedules' form with the following settings in the summary area:

- Screen ID: Import Scenarios
- Schedule ID: <NEW>
- Description: Import Leads from Marketing Autom
- Action Name: Process All
- Active:
- Execution Limit: 0
- Executed: 0 Times
- Starts On: 7/15/2014
- Expires On: (empty)
- Last Executed On: (empty)
- No Execution Limit:
- No Expiration Date:

Figure: Summary area settings

5. On the **Dates** tab, specify the following settings:
 - **Schedule Type:** *Daily*
 - **Next Execution Date:** Current date
 - **Every** (in the **Daily** section): 1 Day(s)
6. On the **Hours** tab, in the **Starts On** box, select *6:00 AM*.
7. On the form toolbar, click **Save & Close** to apply these schedule settings.
8. On the toolbar of the **Import Scenarios** (SM.20.60.35) form, click **Process**.

As a result, the current version of the list is imported to the system. After that, every day at 6:00 AM, updated lists will be accessed at the shared location that you have specified and imported automatically.

Related Links

[Import by Scenario \(SM.20.60.36\)](#)

[Import Scenarios \(SM.20.60.35\)](#)

[File Synchronization \(SM.20.25.30\)](#)

Step 2.3: Registering Leads Manually

In this step, you will manually create five lead records. Two of these leads have discovered MyCompany through a referral, and three leads have been generated by a phone inquiry. On the **Leads** (CR.30.10.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Leads**) form, proceed as follows:

1. Click **Add New Record** on the form toolbar, and then, on the **Details** tab, specify the data related to Lead #1 (John Elbow), which is shown in the table below.
2. Click **Save** on the form toolbar.

Similarly, create records for all other leads for which data is shown in the following table.

	Lead #1	Lead #2	Lead #3	Lead #4	Lead #5
Title	Mr	Mrs	Mr	Empty	Mr
First Name	John	Andrea	Leslie	Mag	Joseph
Last Name	Elbow	Tinkler	Graff	Darrow	Clapton
Position	CEO	Accountant	Credit Manager	Accountant	Auditor
Company Name	Advogent Group, Inc.	United Utilities Networks Ltd	Airgas, Inc.	Data Source Software Corp	IDF Global
Email	jelbow@advogent.con	atinkler@uun.con	lgraff@airgas.con	mdarrow@dss.con	jclapton@idf.con
Source	Referral	Referral	Phone Inquiry	Phone Inquiry	Phone Inquiry
Country	US	US	US	US	US

Now, all these leads have a status of *New* and the reason set to *Assign*—this means that the leads are ready to be assigned to owners for qualification.

Related Links

[To Create a Lead Leads \(CR.30.10.00\)](#)

Additional Information

You can use the following information for additional reading, but these concepts are outside of the scope of this course.

Import Scenarios

You can seamlessly import data from a third-party application or an external file of a specific type by creating and executing import scenarios. Also, you can edit the lead import scenario to import lead attributes if the list of leads that you have exported from the previous CRM system contains attributes that you want to keep. For details on how to work with import scenarios, see [Scenarios for Data Import](#).

File Synchronization

You can use automation schedules to perform periodic synchronization between a file on an Acumatica ERP site and a file on a local computer or network. For more information, see [How to Set Up Automatic File Synchronization](#).

Scheduled Processing

With Acumatica ERP, you can set up automated processing for most processing forms instead of initiating the processing manually. For details on how you can use automation schedules, see [Scheduled Processing](#).

Lesson Summary

In this lesson, you have learned the basics of registering leads in the system by using the Customer Management module. You have learned how to perform such essential procedures as importing leads in bulk by using import scenarios and registering leads manually. Also, you have learned how to maximally automate import of leads generated by a marketing automation tool.

Now you are ready to learn how to qualify leads and which methods to use for monitoring the qualification process.

Lesson 3: Lead Qualification

MyCompany has adopted a qualification process that includes the following tasks (see the diagram below):

1. After leads have been registered in the system, they all should be assigned to telemarketers.
2. Telemarketers should validate lead information and perform initial classification.
3. The results of the qualification process should be monitored by a manager to prevent leads from being left unattended for too long.



Figure: The diagram of the qualification process adopted by MyCompany

In this lesson, you will learn which tools of Acumatica ERP you can use to perform these tasks (see the following diagram that illustrates how this process can be implemented in Acumatica ERP). You will do the following:

1. Assign all new leads to owners (see [Step 3.1: Assigning Leads to Owners](#)).

In Acumatica ERP, an owner is an employee who has been assigned to a record and is responsible for its processing. In our case, lead owners are telemarketing employees whose primary task is to verify lead information.

You can make the assignment process fast and reliable if you split it into the following consecutive routines:

1. Mass-assigning leads by using an assignment map.

In Acumatica ERP, an assignment map is a set of rules and conditions that define the process of automatic distribution of work items (in this case, leads) between employees.

In this course, you will use a predefined assignment map to assign leads basing on their source.

2. Manually assigning the leads that have missed the assignment map criteria.

To be able to do that, you will have to create an inquiry that will help you find all unassigned leads.

You will also set up email notifications so that an owner, when assigned to a lead, received a notification by email.

2. Qualify leads (see [Step 3.2: Qualifying Leads](#)).

During the lead qualification process, lead owners can perform any of the following operations:

- Discard leads that are fake or have no contact information.
- Convert leads to prospects if they showed interest in the company's current offer.

A lead that showed interest in the offered services qualifies as a prospect; this lead can be converted to a new business account with some data automatically copied from lead details to the business account record. Simultaneously, the lead is converted to a contact that becomes associated with the new business account.

In Acumatica ERP, business accounts are used to store information related to prospects, customers, and vendors. One business can be both your customer and your vendor; however, vendors are out of the scope of this course.



One business account can be associated with multiple contacts. You can create a business account by using the **Business Accounts** (CR.30.30.00) form, and then associate it with as many contacts as needed by using the **Contacts** tab on this form.

- Convert leads to opportunities if they are ready to buy any of the currently offered services.

In Acumatica ERP, an opportunity represents a potential sale to a new or existing customer.

A lead that becomes immediately interested in the offer and displays an intention to buy as soon as possible can be regarded as a qualified opportunity. In Acumatica ERP, you can convert such a lead to a new opportunity with some data automatically copied from lead details to the opportunity record. At the same time, the lead is converted to a contact that becomes associated with the new opportunity.

- Suspend leads until repeated qualification if they are not yet ready for conversation.

For instance, if an owner has failed to contact a lead or if a lead has been busy and asked the owner to call again a few days later, the lead can be temporarily suspended.

- Convert leads to contacts if they are not interested in the company's current offer but would like to learn about future offers.

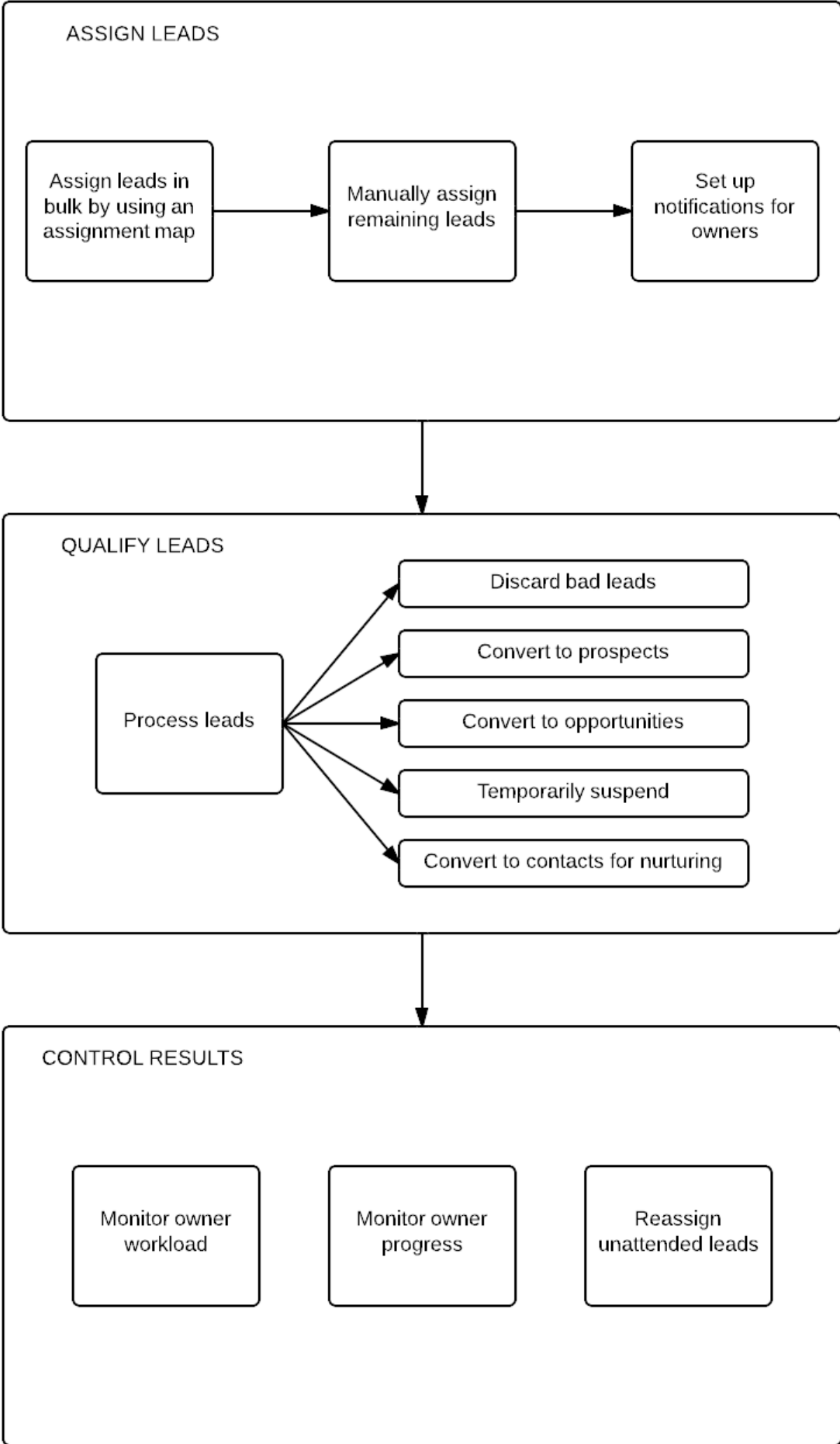
If a lead has been contacted and the lead's information has been validated but the contacted person has shown no immediate interest in the offered services, you can convert this lead to a contact. Contacts are records for confirmed individuals whose contact information has been retained for future use. Contacts can be associated with business accounts (when they qualify as potential customers or vendors) or sales opportunities (when they express immediate interest in the offered services); a business account can have multiple contacts associated with it. Of course, if you want to create a record for a confirmed individual, you do not have to create a lead and then convert the lead to a contact; instead, you can create a contact right from the start by using the **Contacts** (CR.30.20.00) form.

To keep track of all details relative to each lead, owners should create associated activities. In Acumatica ERP, an activity is something you do that relates to an entity (in this case, to a lead) with which the activity record becomes associated in the system. Activities can be of various types, such as phone calls, emails, and notes.

Also, telemarketers can perform initial classification of leads. A telemarketer, when converting a lead to a contact, a prospect, or an opportunity, should associate it with a class and specify attribute values, if possible. A class may contain information about the default workgroup that can deal with records of this class; thus, the record may become reassigned to a sales specialist for further processing.

3. Control the results of the lead qualification process (see [Step 3.3: Monitoring the Qualification Process](#)).

When the number of new leads assigned to an owner grows faster than the owner is capable to deal with, some leads may remain unattended for a considerably long time. To make sure that you will not lose any of these leads, you need to reassign their owners. To be able to control such issues, you need to use customized inquiry forms that have been pre-configured for the snapshot used in this course.



Lesson Objectives

In this lesson, you will learn the basic procedures that will help you organize the lead qualification process. You will do the following:

- Assign leads to owners
- Set up email notifications for owners
- Convert leads to contacts, prospects, or opportunities
- Reassign unattended leads to other owners

Step 3.1: Assigning Leads to Owners

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. *Assign leads in bulk by using an assignment map.*
2. *Manually assign the leads* that have missed the assignment map criteria.
3. *Set up email notifications.*

1. Assign Leads by Using an Assignment Map

The snapshot that you have restored includes one pre-configured lead assignment map. Before you start mass-assigning leads, on the **General Settings** tab of the **Customer Management Preferences** (CR.10.10.00; **Organization** > **Customer Management** > **Configuration** > **Setup** > **Customer Management Preferences**) form, specify the lead assignment map that will be used by the system during the mass assignment process (as shown in the following screenshot), and save the changes.

« ↻ Customer Management Preferences ☆



General Settings

Opportunity Probabilities

Campaign Types

Numbering Sequence

- * Opportunity Numbering Sequence: OPPORTUNITY
- * Case Numbering Sequence: CASE
- * Mass Mail Numbering Sequence: MMAIL
- * Campaign Numbering Sequence: CAMPAIGN

Classes

- Default Lead Class:
- Default Contact Class:
- Default Business Account Class:
- Default Opportunity Class:
- Default Case Class:

Assignment Map

- Lead Assignment Map: Lead Assignment Map
- Contact Assignment Map:
- Business Account Assignment Map:
- Opportunity Assignment Map:
- Case Assignment Map:

General

- Verify Activity Source
- Show Author's Email Address
- Copy Notes
- Restrict Email Recipients
- Copy Attachments

Purge Settings

- Purge Unconverted Leads that Are Older than: 6 Months
- Purge Inactive Contacts with No Activities for More than: 9 Months

After that, open the **Assign Leads** (CR.50.30.10; **OrganizationCustomer ManagementProcessesMass ProcessesAssign Leads**) form, and proceed as follows:

1. In the grid, click the header of the **Owner** column and select the *Is Null* filter condition, as shown in the screenshot below.

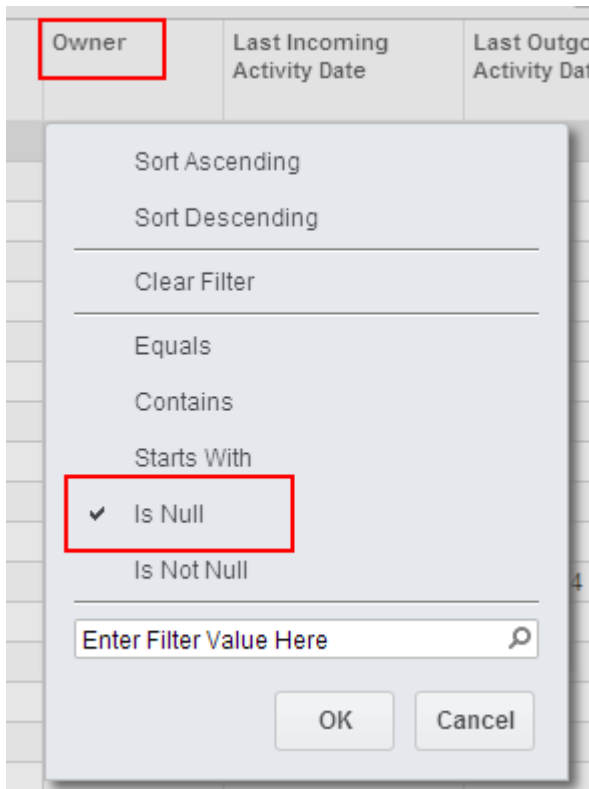


Figure: Filter to show leads with no owner

Now only the leads without an owner are listed in the grid.

2. On the form toolbar, click **Process All**.

If you have a large list of leads, the processing can take a considerable amount of time.

A green check mark appears on the form toolbar when the process is successfully completed. A small green check mark also appears for each row in the grid to indicate that the record has been successfully processed.

As a result, all leads that have met the criteria of the assignment map are assigned, depending on the source of their origin, to different owners. The leads without any source specified, or with source values that are not covered by the assignment map, can be assigned manually.

2. Manually Assign Leads to Owners

Before you start assigning leads manually, you may want to estimate the workload of lead owners. Navigate to the Acumatica ERP home page and use the **Lead Summary by Owner** dashboard to find out which owner is assigned to the smallest number of leads.

To assign lead owners manually, open the **Leads** (CR.40.10.00; **Organization > Customer Management > Work Area > Explore > Leads**) form, and do the following:

1. In the table toolbar, click the Filter icon (as shown in the screenshot below).

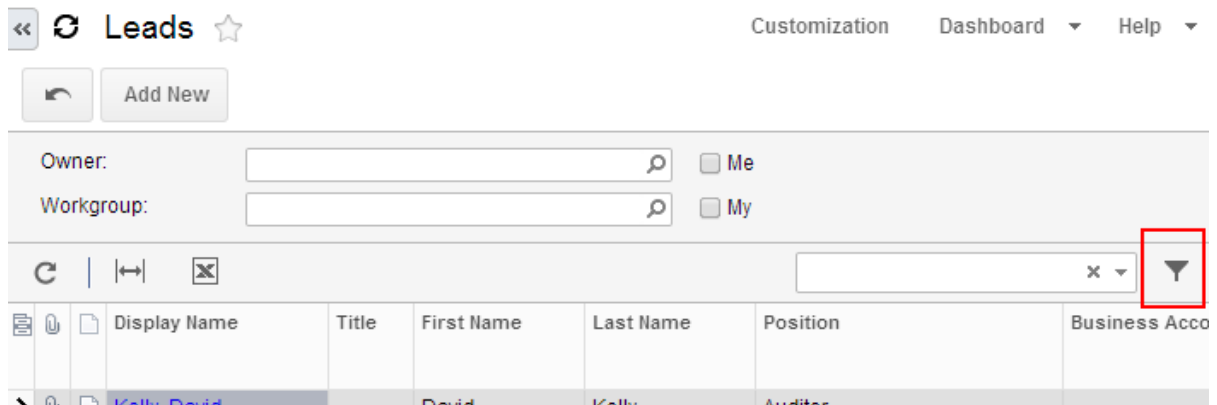


Figure: Filter icon

The **Filter Settings** dialog box opens.

2. In the grid, add a row with the following information specified:
 - **Property:** *Owner*
 - **Condition:** *Is Null*
3. Click **Save** at the bottom of the dialog box, and when a new dialog box opens, enter the filter name: *Unassigned Leads*.
4. In the Selection area of the dialog box, select the **Shared** check box, and then click **OK** to save the reusable filter—from now on, you will be able to reuse this filter anytime by selecting it in the filter box.

As a result, the filter is applied, and now only unassigned leads are listed in the grid.

5. Click the first name in the list.

The **Leads** (CR.30.10.00) form opens in a pop-up window. The form is filled in with the data of the selected lead.

6. In the Summary area of the form, in the **Owner** box, select the employee with the least workload.
7. In the **Status** box, select *Open*.

You can use the *Open* status to indicate that the lead has been assigned an owner and is ready for the qualification process. The value in the **Reason** box automatically changes to *In Process*.

8. On the form toolbar, click **Save & Close**.
9. Repeat instructions 2 to 5 for each of the remaining unassigned leads.

3. Set Up Email Notifications

Each time, when assigned to a new lead, an owner should receive a notification by email. To set up notifications, open the **Automation Notifications** (SM.20.50.40; **System > Automation > Manage > Automation Notifications**) form, and proceed as follows:

1. In the Summary area of the form, specify the following information:
 - **Screen ID:** *Leads (Organization>Customer Management>Work Area>Enter>Leads)*
 - **Description:** *New Lead Owner Assigned*
 - **Active:** Selected
 - **Public:** Cleared

- **Subject:** You have been assigned to a new lead
 - **Data Source:** *None*
2. On the **Message** tab, in the text area, type the following message:
Dear ((Lead.OwnerID)),
You have been assigned to a new lead: ((Lead.DisplayName))
Lead source: ((Lead.Source))
Please start processing
Sincerely yours, [your name]
The owner will see this message in the body of the notification email, with relative data automatically specified in place of placeholders.
 3. On the **Conditions** tab, add a row with the following information:
 - **Active:** Selected
 - **Field Name:** *Owner*
 - **Condition:** *Is Not Null*
 4. On the **Addresses** tab, edit the existing row as follows:
 - **Active:** Selected
 - **Source:** *Document*
 - **Email:** *Owner->Default Contact->Email*
 5. On the **Fields** tab, add a row with the following information:
 - **Active:** Selected
 - **Field Name:** *Owner*
 6. On the form toolbar, click **Save**.

Related Links

[Assignment Rules](#)

[Customer Management Preferences \(CR.10.10.00\)](#)

[Assign Leads \(CR.50.30.10\)](#)

[Leads \(CR.40.10.00\)](#)

[Automation Notifications \(SM.20.50.40\)](#)

Step 3.2: Qualifying Leads

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. *Close recently imported leads* that have neither email addresses nor phone numbers, because you have no way to contact them. For this purpose, you will use the mass-update functionality.
2. Convert a lead that has showed interest in the current offer *to a prospect*, and create an associated phone call activity.
3. Convert a lead that is ready to buy your services *to an opportunity*, and create an associated phone call activity.
4. *Suspend a lead* that is not yet ready for conversation until repeated qualification, and create an associated phone call activity.
5. Convert a lead that is not interested in the company's current offer *to a contact*, and create an associated phone call activity.

1. Discard Leads

To close leads in bulk, open the **Update Leads** (CR.50.30.20; **Organization > Customer Management > Processes > Mass Processes > Update Leads**) form, and proceed as follows:

1. In the table toolbar, click the Filter icon.
The **Filter Settings** dialog box opens.
2. In the grid, add four rows, whose information is show in the table below.

Row	Property	Condition	Operator
1	<i>Email</i>	<i>Is Null</i>	<i>And</i>
2	<i>Phone 1</i>	<i>Is Null</i>	<i>And</i>
3	<i>Phone 2</i>	<i>Is Null</i>	<i>And</i>
4	<i>Phone 3</i>	<i>Is Null</i>	<i>And</i>

3. Click **Save** at the bottom of the dialog box, and when a new dialog box opens, enter the filter name: `Leads to discard`.
4. In the Selection area of the dialog box, select the **Shared** check box, and then click **OK** to save the reusable filter—from now on, you will be able to reuse this filter anytime by selecting it in the filter box.
As a result, the filter is applied, and now only leads that can be discarded are listed in the grid.
5. On the form toolbar, click **Process All**.
The **Values for Update** dialog box opens.
6. In the **Values for Update** dialog box, do the following (see the screenshot below):
 - a. Select the check box next to the **Status** box.
 - b. In the **Value** column for the **Status** box, select *Closed*.

Values for Update ✕

Step 1 of 2 - Please select the fields you want to update

<input type="checkbox"/>	Name	Value
<input type="checkbox"/>	Position	
<input type="checkbox"/>	Business Account	
<input type="checkbox"/>	Parent Business Account	
<input checked="" type="checkbox"/>	Status	Closed
<input type="checkbox"/>	Reason	
<input type="checkbox"/>	Class ID	
<input type="checkbox"/>	Source	
<input type="checkbox"/>	Workgroup	
<input type="checkbox"/>	Owner	
<input type="checkbox"/>	Campaign ID	
<input type="checkbox"/>	Contact Method	

Figure: Selection of the Status box

- c. Click **Next**, and then click **Finish**.

A green check mark appears on the form toolbar when the process is successfully completed. A small green check mark also appears for each row in the grid to indicate that the record has been successfully processed.

2. Convert a Lead to a Prospect

On the **Leads** (CR.30.10.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Leads**) form, do the following:

1. In the Summary area of the form, in the **Lead ID** box, select *Mag Darrow*.
2. On the form toolbar, click **Actions** > **Convert to Business Account** (as shown in the screenshot below).

The screenshot shows the 'Leads' form with the following fields: Lead ID: Darrow, Mag; Status: Open; Reason: In Process. The 'Actions' dropdown menu is open, and the 'Convert to Business Account' option is highlighted with a red box.

Figure: Convert to Business Account action

The **New Account** dialog box opens; the company name is copied from lead details (as illustrated in the screenshot below).

The 'New Account' dialog box is shown with the following fields: Business Account ID (empty), Company Name: Data Source Software Corp (highlighted with a red box), and buttons for 'Create' and 'Cancel'.

Figure: New Account dialog box

3. In the **Business Account ID** box of the **New Account** dialog box, type `DATASOURCE`, and then click **Create**.

The **Business Accounts** (CR.30.30.00; **Organization > Customer Management > Work Area > Manage > Business Accounts**) form opens; it is filled in with the data of the lead record.

Newly created business accounts are considered to be prospects, as indicated by the **Type** value (see the screenshot below); they can be converted to customers or vendors.

The 'Business Accounts' form is shown with the following fields: Business Account: DATASOURCE; Business Account Name: Data Source Software Corp; Status: Active; Workgroup: (empty); Owner: (empty); Type: Prospect (highlighted with a red box).

Figure: Business account type

4. On the **Details** tab, in the **Class ID** box, select `ENDCUST`.
5. On the **Attributes** tab, specify the following information:
 - *Interested in: Performance improvement*
 - *Organization size: Over 500 employees*
6. On the form toolbar, click **Save**.

As a result, the lead record is converted to a contact, a new business account is created, and the contact becomes associated with the business account.

7. On the table toolbar of the **Activities** tab, click **Add Activity** > **Add Phone Call**, as shown in the screenshot below.

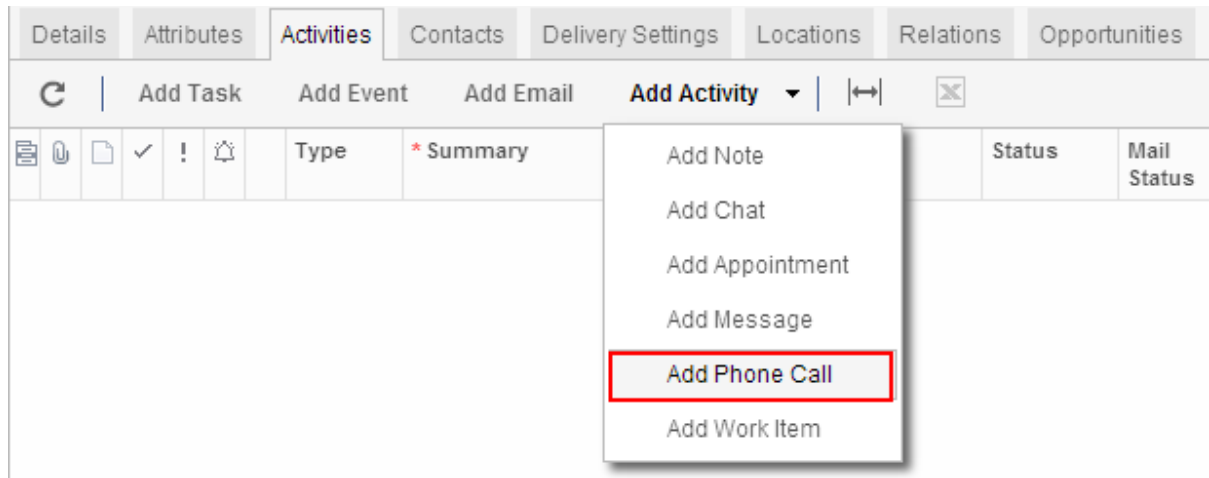


Figure: Add Activity menu on the table toolbar

The **Activity** form opens in a pop-up window.

8. Create a record by specifying the following settings and saving the record:

- **Summary:** Mag Darrow: Lead Qualified
- **Date:** Current date

The description that you type in the **Summary** box can be used as the identifier of the activity when you search for it or use filters on the **Activities** (EP.40.43.00) form.

The empty **Owner** box indicates that the activity does not require further processing.

9. In the editor area of the **Activity** form, type your comments about the phone call—such as the following:

Ms Darrow belongs to a large corporation. They are interested in performance improvement. They will consider our offer.

10. Click **Save & Close** on the form toolbar.

As a result, a phone call activity is created and associated with the prospect; the activity is listed for this prospect in the grid on the **Activities** tab of the **Business Accounts** (CR.30.30.00) form.

3. Convert a Lead to an Opportunity

On the **Leads** (CR.30.10.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Leads**) form, do the following:

1. In the Summary area of the form, in the **Lead ID** box, select *Leslie Graff*.
2. On the form toolbar, click **Actions** > **Convert to Opportunity** (as shown in the screenshot below).

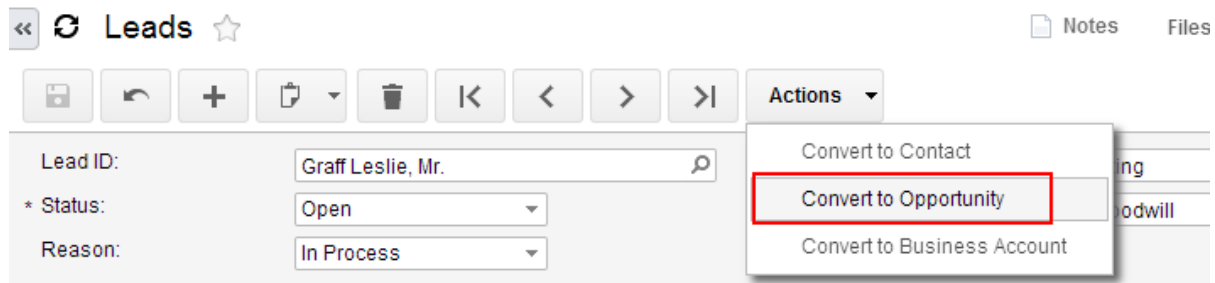


Figure: Convert to Opportunity action

The **Opportunities** (CR.30.40.00) form opens; it is filled in with the data of the lead record.

3. In the Summary area of the form, specify the following information:
 - **Class ID:** *DIRECT*
 - **Status:** *New*
 - **Stage:** *Prospect*
 - **Subject:** *Airgas, Inc - Ready for financial strategy consulting*
4. On the **Attributes** tab, specify the following information:
 - *Interested in: Financial strategies*
 - *Organization size: 100-500 employees*

5. On the form toolbar, click **Save**.

As a result, the lead record is converted to a contact, a new opportunity is created, and the contact becomes associated with the opportunity.

6. On the **Activities** tab, create a *Phone Call* activity and specify all the relative information.

4. Suspend a Lead

On the **Leads** (CR.30.10.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Leads**) form, do the following:

1. In the Summary area of the form, specify the following information:
 - **Lead ID:** *Bill Coleans*
 - **Status:** *Suspended*

The **Reason** value is automatically set to *Nurture*. You can filter leads by this value (or by status) when you search for temporarily suspended leads by using the **Leads** (CR.40.10.00) form.

2. On the form toolbar, click **Save**.
3. On the **Activities** tab, create a *Phone Call* activity and specify all the relative information.

5. Convert a Lead to a Contact

On the **Leads** (CR.30.10.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Leads**) form, do the following:

1. In the Summary area of the form, in the **Lead ID** box, select *Joseph Clapton*.
2. On the form toolbar, click **Actions** > **Convert to Contact**, as shown in the screenshot below.

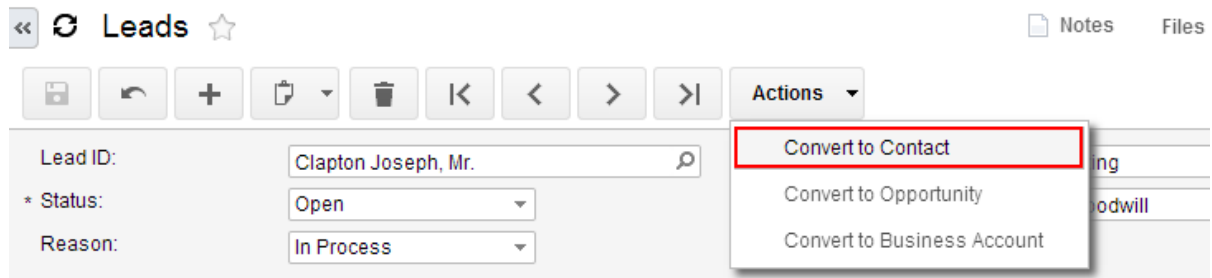


Figure: Convert to Contact action

The **Contacts** (CR.30.20.00; **Organization > Customer Management > Work Area > Manage > Contacts**) form opens; it is filled in with the data of the lead record. The type of the record changes from *Lead* to *Contact*.

3. On the **Details** tab, in the **Contact Class** box, select *ENDCUST*.
4. On the **Attributes** tab, specify the following information:
 - *Interested in: Other*
 - *Organization size: 1-100 employees*
5. On the form toolbar, click **Save**.

As a result, the lead record is converted to a contact, which can be further processed and converted to a business account or associated with an opportunity.

6. On the **Activities** tab, create a *Phone Call* activity and specify all the relative information.

Related Links

[Lead Conversion](#)

[Business Accounts](#)

[Tasks, Events, and Activities](#)

[Leads \(CR.30.10.00\)](#)

[Contacts \(CR.30.20.00\)](#)

[Business Accounts \(CR.30.30.00\)](#)

[Opportunities \(CR.30.40.00\)](#)

[Update Leads \(CR.50.30.20\)](#)

Step 3.3: Monitoring the Qualification Process

To complete this step, you need to log in to Acumatica ERP as Jim Goodwill, the marketing manager. Use the following credentials:

- **Username:** Jim
- **Password:** 123

To control the results of the lead qualification process, proceed as follows:

1. Navigate to the Acumatica ERP home page and click **View all** at the bottom right-hand corner of the **Lead Summary by Owner** dashboard.

The **Lead Summary by Owner** customized inquiry form opens.

2. For each of the listed employees, compare the numbers in the **Workload** column with the numbers in the **Open Leads** column.

The **Workload** column displays the total number of leads assigned to an employee (excluding closed or discarded leads).

The **Open Leads** column displays the number of new (unqualified) leads that were created over a month ago.

If, for a particular employee, the numbers in these columns are sufficiently close to each other, then the employee works with low efficiency and makes poor progress on the qualification task.

3. Navigate back to the Acumatica ERP home page and click **View all** at the bottom right-hand corner of the **Unattended Leads** dashboard.

The **Unattended Leads** customized inquiry form opens.

4. In the Selection area of the form, specify the following information:

- **No activities for more than:** *One Month*
- **Show leads older than:** *One Month*

In the grid, only those leads are listed that were created over a month ago and haven't had any associated activities for over a month.

To prevent leads from being left unattended for too long (and to minimize the possibility of losing potential opportunities), you can reassign the owner by doing the following:

1. Click a name in the list.
The **Leads** (CR.30.10.00) form opens in a pop-up window. The form is filled in with the data of the selected lead.
2. In the Summary area of the form, in the **Owner** box, select another employee.
3. On the form toolbar, click **Save & Close**.
4. Repeat instructions 1 to 3 for each of the remaining unattended leads.

Related Links

[Assignment Rules](#)

[Leads \(CR.30.10.00\)](#)

Additional Information

You can use the following information for additional reading, but these concepts are outside of the scope of this course.

Assignment Maps

Acumatica ERP provides a flexible mechanism for automatic assignment of work items (leads, cases, and so forth) to employees for processing. For more information on the rules of creating assignment maps, see [Assignment Rules](#).

Automation Notifications

In Acumatica ERP, you can set up automatic notifications on record changes. Record change notifications are emails the system generates and sends when specific changes are made to particular documents. For details, see [Notifications About Changes](#).

Generic Inquiries

In Acumatica ERP, you can create inquiries to get the information you want to view. See [How to Design an Inquiry in the Inventory Module](#) for an example of how an inquiry can be created.

Dashboards

A dashboard is a collection of widgets that are displayed on a single page and are designed to give you needed information at a glance. For details on which typical tasks you can perform with dashboards, see [Working with Dashboards](#).

Lesson Summary

In this lesson, you have learned how to use assignment maps to assign leads to owners. Also, you have learned how to qualify leads, which includes converting leads to contacts, prospects, or opportunities, suspending leads for nurturing, and discarding bad leads. Finally, you have learned which tools you can use to monitor the qualification process.

Now you are ready to start nurturing confirmed contacts.

Lesson 4: Contact Nurturing

MyCompany needs to keep in touch with confirmed contacts who are not yet ready to buy any of the currently offered services, but might be interested in future offers (or their attitude might change in course of time). Thus, contacts should be constantly reminded of MyCompany which includes the company's sending newsletters and promotional emails and running marketing campaigns. The purpose of these activities is to stimulate feedback from contacts and boost their transition to real sales opportunities, or to encourage repeat sales.

In this lesson, you will perform the following tasks:

1. Create a marketing list that will be used as a source of email addresses for the company's mass emails (see [Step 4.1: Creating a Marketing List](#)).

A marketing list is a list of contacts that might share particular characteristics or form a special audience. In Acumatica ERP, you can create as many marketing lists as you need. Based on a marketing list, you can create mailing lists for mass-mailing of newsletters, special offers, or other periodically sent information. Maintaining marketing lists is an effective way to advertise products and services.

2. Prepare a marketing campaign, which includes defining campaign types and campaign members (see [Step 4.2: Preparing a Marketing Campaign](#)).

A campaign is a specific set of marketing activities that are aimed at contacts and undertaken to achieve a particular marketing goal, such as stimulating demand, boosting name recognition, or generating revenue.

MyCompany is going to launch a new marketing campaign to promote its services. During a two-week period, each of the company's contacts will have an opportunity to try any of its services at half-price. You need to prepare for the campaign and then use Acumatica ERP tools to automate the process. You will use the mass emailing feature for this campaign.

Before you start creating an email marketing campaign, you should do the following preparatory work: First, prepare a list of campaign members. After that, estimate the revenue you expect to receive as a result of the campaign and the planned budget; this information will be useful when you analyze campaign results. Also, you have to define in Acumatica ERP the campaign types that your company uses.

3. Configure the functionality of incoming mail processing (see [Step 4.3: Setting Up Mail Replies Processing](#)).

To process replies to mass email, you can use the built-in automatic processing of incoming emails without additional configuring. As part of this processing, the system forwards incoming emails to employees in accordance with tracked email history. You can adjust this processing to your business needs by using a number of parameters located on the **Incoming Mail Processing** tab of the **System Email Accounts** (SM.20.40.02) form. In this lesson, you will activate only the base processing feature.

4. Send a mass email to selected contacts (see [Step 4.4: Sending a Mass Email](#)).

In Acumatica ERP, you can prepare a mass email and send it to the intended audience (selected contacts, mailing list members, or campaign members). To personalize emails, you can insert the recipient's data into the text of the email by using placeholders. You can create an email from scratch, or you can use a personal or shared predefined template from the Notification Templates Wiki. (Using predefined templates can save time.) Before sending the mass email, you can test it by sending a preview email to one of your email accounts.

In this lesson, you will prepare and send a mass email to the members of the previously created marketing campaign.

Lesson Objectives

In this lesson, you will learn how to automate nurturing of confirmed contacts by using the Customer Management module of Acumatica ERP. You will do the following:

- Create a marketing list
- Prepare a marketing campaign
- Set up mail replies processing
- Send a mass email

Step 4.1: Creating a Marketing List


In this step, you will perform the following tasks, which are described in detail in the following sections:

1. [Create a marketing list](#) that will be used for distribution of your company's newsletters.
2. [Add members to the marketing list](#).

1. Create a Marketing List

To create a marketing list, on the **Marketing Lists** (CR.20.40.00; **Organization > Customer Management > Work Area > Manage > Marketing Lists**) form, proceed as follows:

1. In the Summary area of the form, specify the following settings:
 - **Marketing List ID:** NEWS
 - **Name:** Company News
 - **Active:** Selected
2. On the **Configuration Options** tab, do the following:
 - a. In the **Contact Method** box, select *Email* to indicate that you will use this marketing list as a source of addresses for mass emailing.
 - b. Select the **Self-Managed** check box, so that you can manually edit the marketing list. You will be able to add and remove list members, or make them active according to your needs or preferences.



If you want the list to be formed automatically according to a set of solid rules, you can select the **Dynamic List** check box instead. If you do, the **List Members** tab disappears, and you have to specify the selection rules for list members on the **Selection Criteria** tab. All existing or newly added records that meet these criteria will be automatically included in the list.
 - c. In the **Exclude Contacts Marked As** area, select the **Do Not Email** check box. If you have contacts with the **Do Not Email** check box selected on the data entry form (because they specified that they do not want to receive emails from you), these contacts will be ignored when mass emails are sent to the members of the marketing list.

You can check your settings against those in the screenshot below.

Marketing Lists

* Marketing List ID: NEWS Active Workgroup:

* Name: Company News Owner:

Configuration Options | List Members | Selection Criteria

Contact Method: Email

Dynamic List

Self Managed

Exclude Contacts Marked As _____

Do Not Fax Do Not Mail No Marketing

Do Not Call Do Not Email No Mass Mail

Figure: Marketing list settings

3. On the form toolbar, click **Save**.

2. Add Marketing List Members

To add members to a self-managed marketing list, on the **Marketing Lists** (CR.20.40.00) form, you can use one of the following methods:

- On the **List Members** tab, click **Add Row** on the table toolbar and select the contact you need. Do this for each member you want to add to the list.
- On the **Selection Criteria** tab, do the following (see the screenshot below):
 1. In the table, click the header of the **Type** column, and filter the records by selecting the *Contact* type.
 2. Make sure that in the **Select an Action** box, the *Add Members* action is selected.
 3. On the table toolbar, click **Process All**.

As a result, all records that are listed in the table are included in the marketing list. Note that records without email addresses are also included in the list; such contacts will be ignored when mass emails are sent to the members of the marketing list, but they will start receiving emails as soon as email addresses are specified for them.

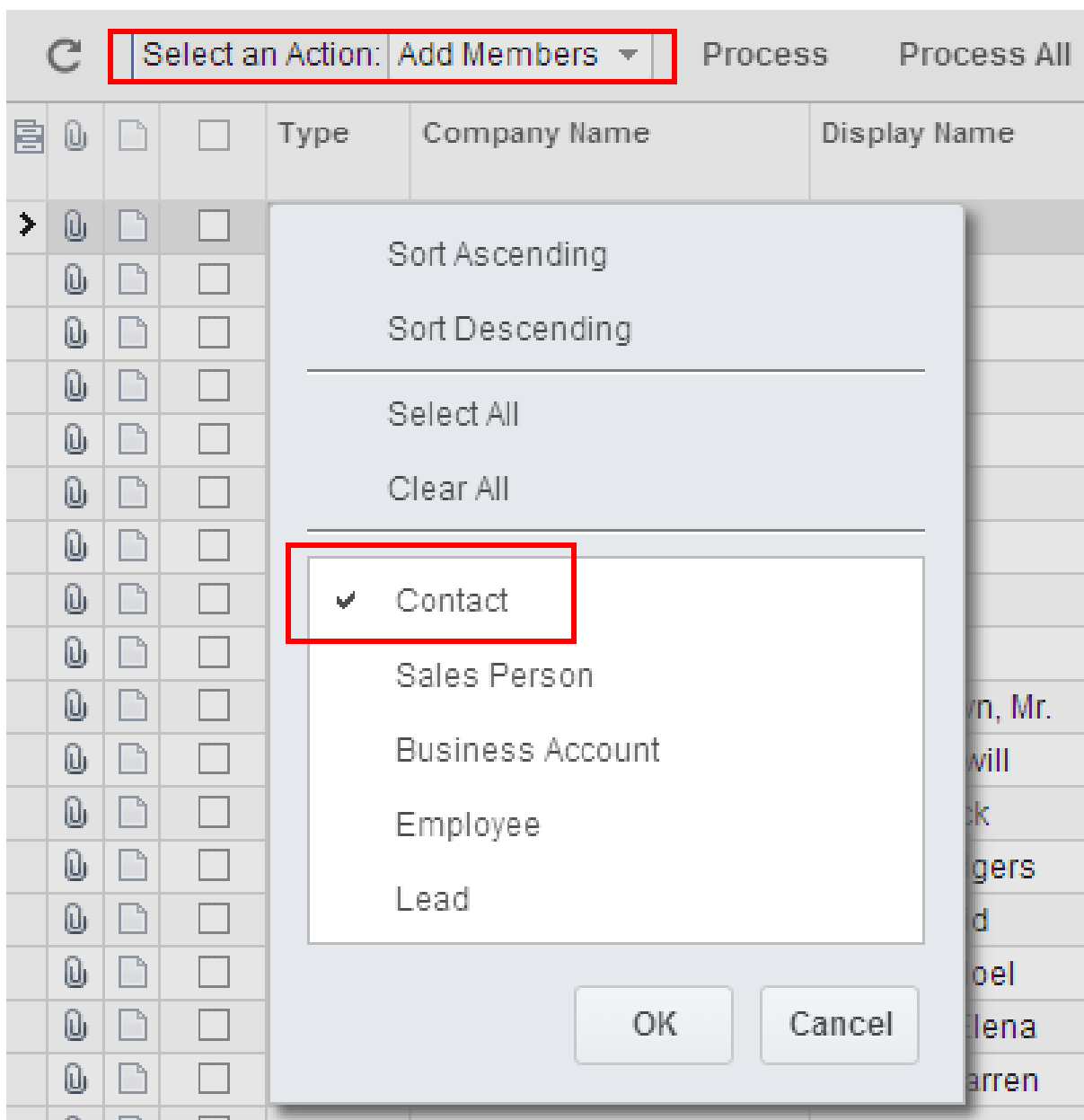


Figure: Grid selection on the Selection Criteria tab

On some occasions, you might need to temporarily exclude a particular contact from the marketing list. In this case, you do not have to remove the contact from the list of members; instead, on the **List Members** tab, you should clear the **Activated** check box in the row that contains the contact's details.

Related Links

[Managing Marketing Lists and Subscriptions](#)

[Marketing Lists \(CR.20.40.00\)](#)

Step 4.2: Preparing a Marketing Campaign

In this step, you will prepare a new campaign in Acumatica ERP by performing the following tasks, which are described in detail in the following sections:

1. *Define marketing campaign types* that your company is going to use for upcoming campaigns
2. *Create a new marketing campaign*
3. *Add campaign members*

1. Define Marketing Campaign Types

You will define the following campaign types that your marketing team plans to use for upcoming campaigns:

- Email marketing (mass-mailing promotional messages)
- Social media marketing (marketing through such social networking outlets as Facebook, Twitter, LinkedIn, and Youtube)

To define the campaign types, on the **Customer Management Preferences** (CR.10.10.00; **Organization > Customer Management > Configuration > Setup > Customer Management Preferences**) form, on the **Campaign Types** tab, add two rows by using the information from the table below, and save the changes.

Type	Description
EMAILMKT	Mass-mailing promo messages
SOCIALMKT	Marketing in social networks

2. Create a Marketing Campaign

To create a marketing campaign, do the following:

1. On the **Marketing Campaigns** (CR.20.20.00; **Organization > Customer Management > Work Area > Manage > Marketing Campaigns**) form, in the **Campaign Name** box, type *Services at Half-Price*.
2. On the **Campaign Details** tab, specify the following settings (see the screenshot below):
 - **Campaign Type:** *EMAILMKT*
 - **Default Member Status:** *Selected*
 - **Start Date:** Current date
 - **End Date:** Two weeks in the future
 - **Expected Revenue:** Type your estimate (for instance, *1000000*)
 - **Planned Budget:** Type your estimate (for instance, *10000*)

The screenshot shows the 'Marketing Campaigns' form. At the top, there are navigation icons (back, refresh, home, add, delete, left arrow, right arrow) and a 'Notes' icon. The form fields include:

- Campaign ID: <NEW>
- Active:
- Status: Prepared
- Campaign Name: Services at Half-Price

Below the form fields, there are two tabs: 'Campaign Details' and 'Members'. The 'Campaign Details' tab is active, showing the following settings:

* Campaign Type:	EMAILMKT - Mass-emailing prom	Leads Generated:	0
Default Member Status:	Selected	Leads Converted:	0
* Start Date:	4/14/2014	Contacts:	0
End Date:	4/27/2014	Responses:	0
Expected Revenue:	1,000,000.00	Opportunities:	0
Planned Budget:	10,000.00	Won Opportunities:	0
Actual Cost:	0.00	Opportunities Value:	0.00
Expected Response:	0	Won Opportunities Value:	0.00
Mails Sent:	0		
* Promo Code:			

Figure: Marketing campaign settings



In the future, if you launch a second campaign for the members who responded to the first campaign, you may set the **Default Member Status** to *Responded*. You do not have to use this setting, but it might help you distinguish between members that are at different stages of the nurturing process.

3. Make sure that the **Active** check box is selected, and click **Save** on the form toolbar.

Now you can add members to the prepared campaign.

3. Add Campaign Members

You can choose which form to use when you start adding members to a campaign; use one of the following methods:

- Open the **Marketing Campaigns** (CR.20.20.00; **Organization > Customer Management > Work Area > Manage > Marketing Campaigns**) form, select the *Services at Half-Price* campaign. On the **Members** tab, click **Add New Members** (see the screenshot below).

Marketing Campaigns ☆

Notes

Campaign ID: 000001 - Services at H: Active * Status: Prepared

* Campaign Name: Services at Half-Price

Campaign Details Members

Add New Members
 Delete Selected

<input type="checkbox"/>	Contact ID	Position	Email	Phone 1
<input checked="" type="checkbox"/>	Elbow John, Mr.	CEO	jelbow@advogent-grou...	
<input type="checkbox"/>	Tinkler Andrea, Mrs.	Accountant	atinkler@uun.con	
<input type="checkbox"/>	Clapton Joseph, Mr.	Chief Auditor & Credit ...	jclapton@idf.con	



Figure: Add New Members button on the table toolbar

This action opens the **Process Campaign Members** (CR.50.20.00) form (see below).

- On the **Process Campaign Members** (CR.50.20.00; **Organization > Customer Management > Processes > Mass Processes > Process Campaign Members**) form, select the *Services at Half-Price* campaign (see the screenshot below).



« ↻ Process Campaign Members ☆

↶ Process Process All


* Campaign ID: 000001 - Services  

Action: Add Members ▾

▾ Default Shared

↻ | ⇄ |  + 

<input type="checkbox"/>	Brac	* Property	* Condi	Value	Value2	Brac	Ope
<input type="checkbox"/>							

↻ | ⇄ | 













		<input type="checkbox"/>	Display Name	Position	Company Name
		<input type="checkbox"/>	Broekman Rik, Mr.	Manager	N.V. Nationale Borg-Maatschappij
		<input type="checkbox"/>	Coleans Bill, Mr.		Advanced Concepts Of Engineer...
		<input type="checkbox"/>	Coudane Benedicte	Network manager	S.G. Daedalus
		<input type="checkbox"/>	Darrow Mag, Mrs.	Client Services Manager	deVere and Partners (UK) Ltd
		<input type="checkbox"/>	Ehardt Thomas, Mr.	CEO	Advogent Group, Inc.

Figure: Process Campaign Members form

On the **Process Campaign Members** (CR.50.20.00) form, proceed as follows:

1. In the **Action** box, select *Add Members*.
2. In the Filter area, add a row with the following information, and click **Apply**:
 - **Property:** *Type*
 - **Condition:** *Equals*
 - **Value:** *Contact*
3. On the form toolbar, click **Process All** to add all contacts that are listed in the grid.

Related Links

[Managing Campaigns](#)

[Marketing Campaigns \(CR.20.20.00\)](#)

[Process Campaign Members \(CR.50.20.00\)](#)

Step 4.3: Setting Up Mail Replies Processing

In this step, you will activate automatic processing of incoming mail, which will enable your employees to effortlessly keep track of contacts' replies to mass emails. Open the **System Email Accounts** (SM.20.40.02; **Configuration > Email > Manage > System Email Accounts**) form, and proceed as follows:

1. In the Summary area of the form, in the **Email Account ID** box, select the system email account that you created in [Step 1.2: Configuring the System Email Account](#).
2. On the **Incoming Mail Processing** tab, select the **Activate Incoming Processing** check box.
3. On the form toolbar, click **Save**.

As a result, incoming emails will be automatically forwarded to particular employees based on email history tracked by the system.

Related Links

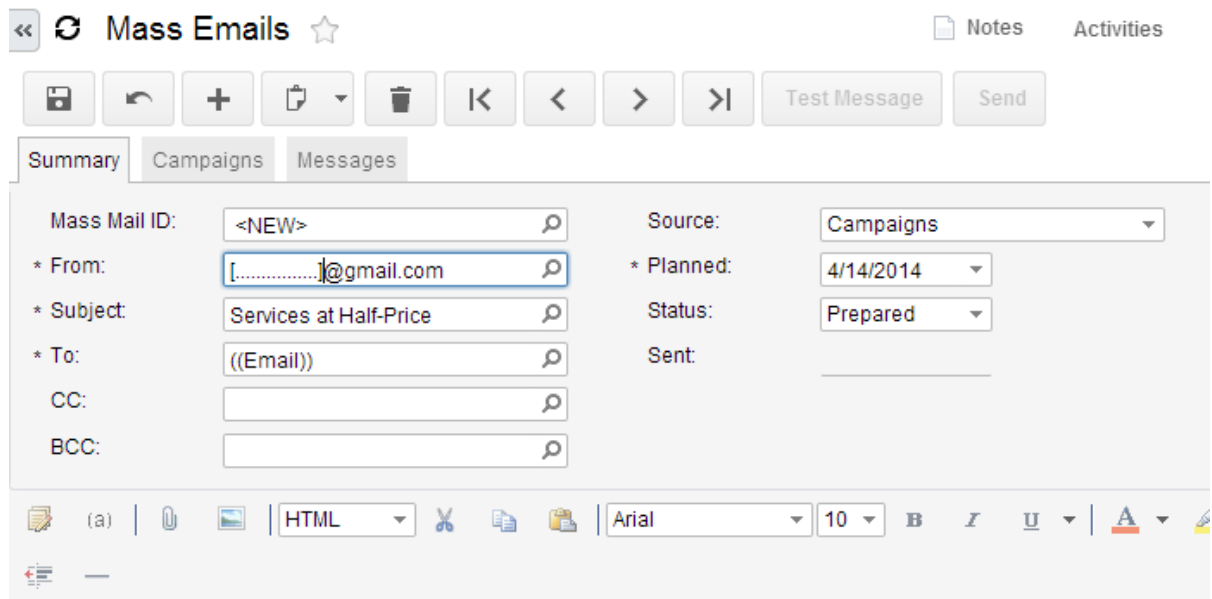
[Incoming Mail Processing](#)

[System Email Accounts \(SM.20.40.02\)](#)

Step 4.4: Sending a Mass Email

In this step, you will prepare and send a mass email to the members of a marketing campaign. On the **Mass Emails** (CR.30.80.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Mass Emails**) form, do the following:

1. On the **Summary** tab, specify the following settings (as shown in the screenshot below):
 - **From:** System email account
 - **Subject:** *Services at Half-Price*
 - **Source:** *Campaigns*
 - **Planned:** Current date
 - **Status:** *Prepared*



Mass Emails

Summary Campaigns Messages

Mass Mail ID: <NEW>

* From: [.....]@gmail.com

* Subject: Services at Half-Price

* To: ((Email))

CC:

BCC:

Source: Campaigns

* Planned: 4/14/2014

Status: Prepared

Sent:

HTML

Arial 10

Dear ((FirstName)) ((LastName)),

During the next two weeks, you can purchase any of our services at half-price.

Figure: Mass email settings

2. In the text editor area, type a message such as the one shown below.

Dear ((FirstName)) ((LastName)),

During the next two weeks, you can purchase any of our services at half-price.

Sincerely yours, [your name]
3. On the **Campaigns** tab, select the check box next to the *Services at Half-Price* campaign, as shown in the screenshot below.

Summary		Campaigns	Messages
		Campaign ID	Campaign Name
	<input checked="" type="checkbox"/>	000001	Services at Half-Price
			EMAILMKT

Figure: Campaign selection

By selecting this check box, you create a mailing list based on the list of the selected campaign's members.

When you have many different campaigns listed in the table and you select a few, each contact that is included in multiple marketing campaigns receives the message only once. The same is true for marketing lists. Also, if multiple contacts have identical email addresses, the message is sent to only one of them.

4. On the form toolbar, click **Save**, and then click **Send**.

If you have selected too many recipients, mass emailing may require significant time. When you click **Send**, emails are only generated but are not sent. To initiate the actual process of sending emails, you could use the **Send and Receive Email** (SM.50.70.10; **Configuration > Email > Schedule > Send and Receive Email**) form. However, you have already scheduled this process to be executed every 5 minutes.

Related Links

[Mass Mail](#)

[Mass Emails \(CR.30.80.00\)](#)

Lesson Summary

In this lesson, you have learned which tools you can use to nurture confirmed contacts. You have created marketing campaigns and marketing lists. Also, you have prepared and sent a mass email to selected recipients.

Now you know all basic principles of how you can optimize marketing by using the Customer Management module of Acumatica ERP.

Lesson 5: Work with Opportunities

MyCompany needs as many opportunities as possible to result in actual sales. The company also wants to be able to control the process of their transition toward closed deals. As a large number of opportunities are moving through different stages, each stage being characterized by a certain probability of ending in actual sales, MyCompany needs to estimate future revenue with reasonable accuracy for each financial period.

In this lesson, you will use the Customer Management module of Acumatica ERP to perform the following tasks:

1. Assign new opportunities to owners (see [Step 5.1: Assigning Opportunities to Owners](#)).

You will distribute opportunities among two sales teams: one responsible for sales to small and medium-sized companies, and the other responsible for sales to large companies. You can use an assignment map to automatically assign all opportunities based on the value of the *Organization size* attribute, but in this lesson, you will only manually assign one opportunity to an owner.

After that you will set up email notifications so that an owner, when assigned to an opportunity, received a notification by email.

2. Process opportunities, which includes preparing initial proposals, negotiating prices and discounts, closing deals, and creating a sales order or invoice (see [Step 5.2: Processing Opportunities](#)).

In Acumatica ERP, you can manually specify the expected amount of the opportunity and the amount of the discount that you are going to apply (as shown in the following screenshot). This is an acceptable practice if you want to obtain accurate forecasts of sales revenue. However, you can specify a list of services or products that are the subject of the potential deal, together with their prices, quantities, and discount amounts; such efforts enable you to easily track all necessary information about the deal and, if needed, create sales orders or invoices based on the products you have associated with the opportunity.

The screenshot shows the Acumatica ERP interface for the 'Opportunities' form. The form is titled 'MAIN - Opportunities' and includes various fields for opportunity details. A red box highlights the 'Manual Amount' section on the right side of the form, which contains the following data:

	Manual Amount
Amount:	2,000.00
Discount:	1,000.00
Total:	1,000.00

Other visible fields in the form include Opportunity ID (000011), Status (New), Reason (Assign), Stage (Qualify), Source, * Class ID (DEFAULT - Default opportunity class), Business Account (DATASOURCE - Data Source Software), Location (MAIN - Primary Location), Contact (Darrow, Mag), Currency (USD), and * Subject (Data Source Software Corp - Performance improvement).

Figure: Manually specified opportunity amount and discount

In this lesson, you will add information about 40 hours of the *Financial Strategies* service that Leslie Graff's company wants to purchase at half-price while your marketing campaign is still running. Then you will close the deal and create an invoice.

An opportunity can be either won or lost. Winning an opportunity means that you have successfully negotiated with the prospect all aspects of the deal and can proceed with creating an invoice based on the opportunity; to be able to do this, you will convert the associated contact to a prospect, and then convert the prospect to a customer.



You can create a sales order based on an opportunity if the *Distribution* feature has been enabled on the **Enable/Disable Features** (CS.10.00.00) form.

In Acumatica ERP, business accounts are used to store information related to prospects, customers, and vendors. One business can be both your customer and your vendor; however, vendors are out of the scope of this course.

A customer account stores all customer-related information you need to conduct business. It includes addresses, locations, contacts and payment methods as well as financial, billing, delivery and mailing settings.



One business account can be associated with multiple contacts. You can create a business account by using the **Business Accounts** (CR.30.30.00) form, and then associate it with as many contacts as needed by using the **Contacts** tab on this form.

You will record information about all your actions by creating associated activities. You will also set up email notifications so that the chief financial officer received a notification by email each time a new invoice has been created.

3. Control the results of opportunity processing (see [Step 5.3: Controlling the Processing Results](#)).

You will monitor the progress that sales employees make in processing opportunities. You will estimate future revenue based on probabilities of current opportunities. Also, you will use a set of dashboards that will help you analyze the process and decide whether any part of it can be improved.

The diagram below illustrates how you can perform processing of opportunities in Acumatica ERP.

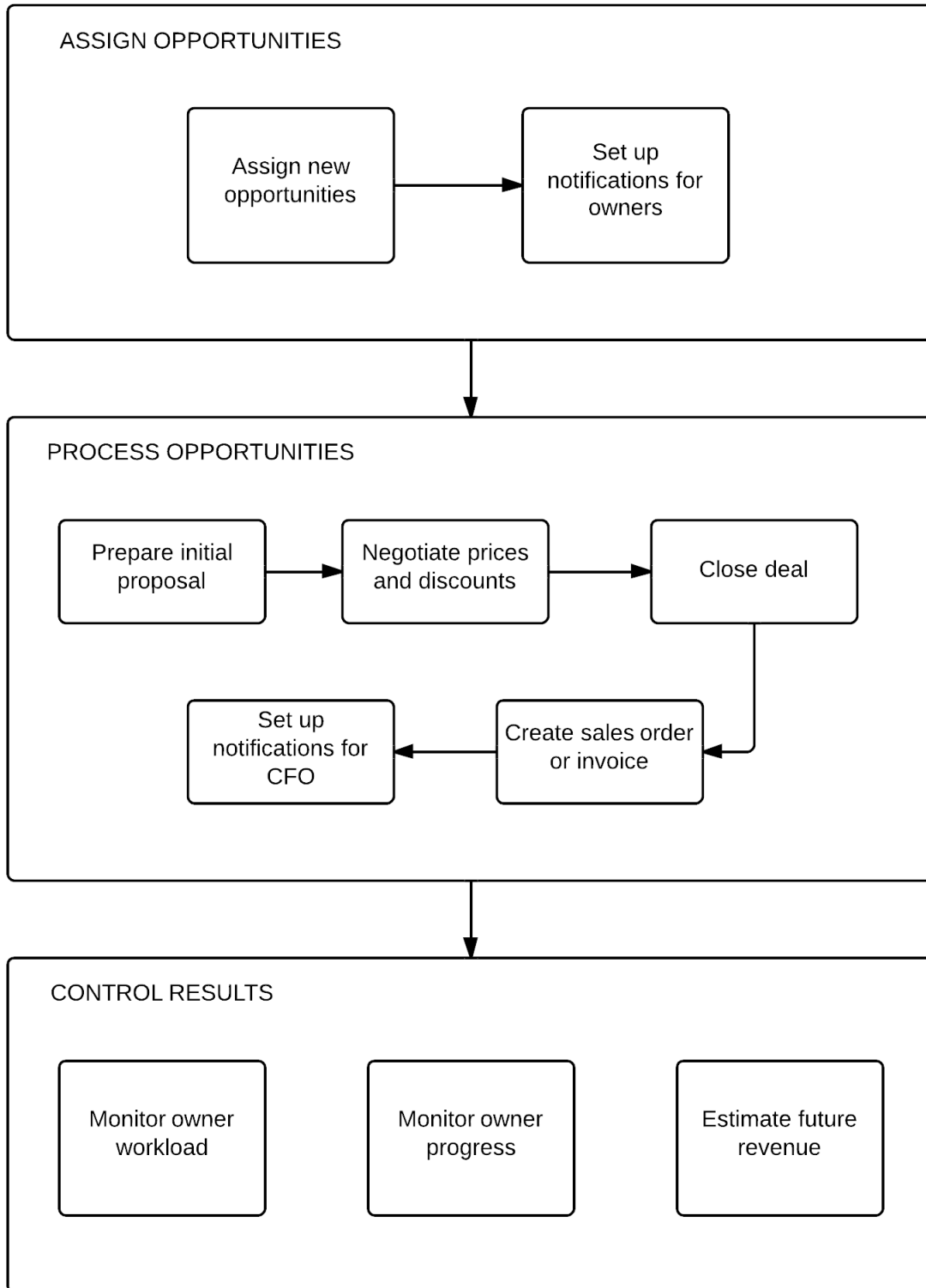


Figure: Opportunity processing diagram

Lesson Objectives

In this lesson, you will learn the basic procedures of working with opportunities. You will do the following:

- Assign opportunities to owners
- Set up email notifications
- Create a list of products associated with an opportunity
- Win an opportunity
- Convert a prospect to a customer
- Create an invoice based on a won opportunity

Step 5.1: Assigning Opportunities to Owners

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. [Manually assign an opportunity to an owner](#)
2. [Set up email notifications](#) for owners

Assign an Opportunity to an Owner

Open the **Opportunities** (CR.30.40.00; **Organization > Customer Management > Work Area > Enter > Opportunities**) form, and proceed as follows:

1. In the Summary area of the form, specify the following information:
 - **Opportunity ID:** *Airgas, Inc - Ready for financial strategy consulting*
 - **Status:** *Open*
 - **Reason:** *Qualify*
2. On the **Attributes** tab, view the value of the *Organization size* attribute (see the screenshot below).
100-500 employees means that you are dealing with a medium-sized organization—thus, you will assign this opportunity to an employee from *Sales Team 1* that specializes in sales to small and medium-sized companies.
3. On the **Details** tab, select the following values, and then save the changes:
 - **Workgroup:** *Sales Team 1*
 - **Owner:** *Harry Grant*



On the **Details** tab, in the **Probability** read-only box, you can see a percentage value that defines the probability of closing the sale at the current stage (see the screenshot below).

The screenshot shows the 'Opportunities' form with the following details:

- Opportunity ID:** 000002
- Status:** Open
- Reason:** In Process
- Stage:** Qualify (highlighted with a red box)
- Source:** Phone Inquiry
- * Subject:** Airgas, Inc - Ready for financial strategy consulting
- * Class ID:** DIRECT - Direct Sales
- Contact:** Graff Leslie, Mr.
- Estimation:** 7/23/2014
- Probability:** 10 (highlighted with a red box)
- Wgt. Total:** 0.00

The 'Details' tab is selected, and the 'Probability' field is highlighted with a red box. The 'Stage' field is also highlighted with a red box.

Figure: Opportunity stage and probability

Set Up Email Notifications

Each time, when assigned to a new opportunity, an owner should receive a notification by email. To set up notifications, open the **Automation Notifications** (SM.20.50.40; **System > Automation > Manage > Automation Notifications**) form, and proceed in a way similar to that described in [Step 3.1: Assigning Leads to Owners](#) (see section 3: [Set Up Email Notifications](#)).

Related Links

[Assignment Rules](#)

[Opportunity Stages](#)

[Opportunities \(CR.30.40.00\)](#)

[Automation Notifications \(SM.20.50.40\)](#)

Step 5.2: Processing Opportunities

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. Prepare an initial proposal by *adding products to an opportunity*
2. *Convert the contact to a prospect business account* to associate the opportunity with the business account
3. *Convert the prospect business account to a customer*
4. Close the deal by *winning the opportunity*
5. *Create an invoice* based on the opportunity
6. *Set up email notifications*

1. Add Products to an Opportunity

On the **Opportunities** (CR.30.40.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Opportunities**) form, do the following:

1. In the Summary area, in the **Opportunity ID** box, select *Airgas, Inc - Ready for financial strategy consulting*.
2. On the **Products** tab, add a new row with the following information (as shown in the screenshot below), and then save the changes:
 - **Inventory ID:** STRATEGY
 - **Free Item:** Cleared
 - **Quantity:** 40
 - **Discount:** 50
 - **Manual Discount:** Selected

Details		Attributes		Activities		Relations		Products		Tax Details		Discount Details	
<div style="display: flex; align-items: center; gap: 10px;"> ↻ + 🗑️ ↔️ 🔍 </div>													
Inventory ID	Free Item	Quantity	UOM	Unit Price	Ext. Price	Discount	Discount Amount	Manual Discount	Amount	Tax Category	Transaction Description		
SERVICE	<input type="checkbox"/>	40.000000	HOURL	50.00	2,000.00	50.000000	1,000.00	<input checked="" type="checkbox"/>	1,000.00	EXEMPT	Service		

Figure: Products tab

In this step, you provide the 50 percent discount because you are running a marketing campaign that offers your services at half-price. You can specify discounts in any of the following ways:

- By typing the discount percentage in the **Discount** box on the **Products** tab (in this case, the value in the **Discount Amount** box is calculated automatically)
- By typing the discount amount in the **Discount Amount** box on the **Products** tab (in this case, the value in the **Discount** box is calculated automatically)
- By typing the discount amount in the **Discount** box in the Summary area of the form



The first two methods should be applied to each row individually; the last method defines the discount amount applied to the summarized amount of all included products and services.

2. Associate a Business Account with the Opportunity

Open the **Opportunities** (CR.30.40.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Opportunities**) form, and proceed as follows:

1. In the Summary area, in the **Opportunity ID** box, select *Airgas, Inc - Ready for financial strategy consulting*.
2. Click the Edit icon next to the **Contact** box (as shown in the following screenshot).

The screenshot shows the 'Opportunities' summary form. The 'Contact' field is highlighted with a red box, indicating the edit icon. The form contains the following information:

Opportunity ID:	000002	* Class ID:	DIRECT - Direct Sales	Amount:
Status:	Won	Business Acco...:		Discount:
Reason:	Price	Location:		Total:
Stage:	Close	Contact:	Graff Leslie, Mr.	
Source:	Phone Inquiry			
* Subject:	Airgas, Inc - Ready for financial strategy consulting			

Figure: Edit icon

The **Contact** (CR.30.20.00) form opens in a pop-up window. The form is filled in with information related to the associated contact (*Leslie Graff*).

3. On the form toolbar, click **Actions** > **Convert to Business Account** (as shown in the screenshot below).

The screenshot shows the 'Contact' form. The 'Actions' dropdown menu is open, and the 'Convert to Business Account' option is highlighted with a red box. The form contains the following information:

Contact ID:	Graff Leslie, Mr.
Type:	Contact
Active:	<input checked="" type="checkbox"/>

The 'Actions' menu includes the following options:

- Add Opportunity
- Add Case
- Copy from Company
- Convert to Business Account**

Figure: Convert to Business Account action

The **New Account** dialog box opens; the company name is copied from contact details (as illustrated in the screenshot below).

New Account

* Business Account ID:

* Company Name:

Create Cancel

Figure: New Account dialog box

- In the **Business Account ID** box of the **New Account** dialog box, type `AIRGAS`, and then click **Create**.

The **Business Accounts** (CR.30.30.00) form opens; it is filled in with the data of the contact record.



Newly created business accounts are considered to be prospects, as indicated by the **Type** value; they can be converted to customers or vendors.

- Leave all data as it is, and click **Save** on the form toolbar.

As a result, a new business account is created, and the contact becomes associated with the business account.

- In the Summary area of the **Opportunities** (CR.30.40.00) form, in the **Business Account** box, specify `AIRGAS`, and then save the changes.

3. Convert the Prospect Business Account to a Customer

On the **Business Accounts** (CR.30.30.00; **Organization > Customer Management > Work Area > Manage > Business Accounts**) form, do the following:

- In the Summary area of the form, in the **Business Account** box, select `AIRGAS`.
- On the form toolbar, click **Actions > Convert to Customer** (as shown in the screenshot below).

Business Accounts ☆

Notes

Save Undo Add Copy Delete Previous Next

* Business Account:

* Business Account Name:

* Status:

Details Attributes Activities Contacts Delivery Settings Locations

Main Contact

Company Name:

Attention:

Email:

Actions

- View Customer
- View Vendor
- Convert To Customer
- Convert To Vendor
- Add Contact
- Add Opportunity
- Add Case
- Change ID

Prospect Cases

Figure: Convert to Customer action

The **Customers** (AR.30.30.00) form opens; it is filled in with the data of the business account.

3. Leave all data as it is, and click **Save** on the form toolbar.

As a result, a new customer is created, and the business account, whose type has changed from *Prospect* to *Customer*, enables you to create an invoice based on the won opportunity.

4. Win the Opportunity

On the **Opportunities** (CR.30.40.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Opportunities**) form, do the following:

1. In the Summary area, specify the following information (as shown in the screenshot below), and then save the changes:
 - **Opportunity ID:** *Airgas, Inc - Ready for financial strategy consulting*
 - **Status:** *Won*
 - **Reason:** *Price*
 - **Stage:** *Close*

The screenshot shows the 'Opportunities' form in a software application. At the top, there are navigation icons (back, refresh, star) and 'Notes' and 'Files' tabs. Below is a toolbar with icons for save, undo, add, copy, delete, and navigation arrows, along with 'Actions' and 'Inquiries' dropdown menus. The main form area contains several fields:

- Opportunity ID: 000002
- * Class ID: DIRECT - Direct Sales
- Status: Won (highlighted in a red box)
- Reason: Price (highlighted in a red box)
- Stage: Close (highlighted in a red box)
- Source: Phone Inquiry
- * Subject: Airgas, Inc - Ready for financial strategy consulting
- Business Account, Location, and Contact fields are empty.
- Amount, Discount, and Total fields are empty.

Figure: Won opportunity settings

The *Price* reason indicates that the customer has accepted the deal because of the attractive price you have offered; you specify the reason value for information purposes. The stage also needs to be specified, because when you are analyzing sales efficiency, you may prepare, for instance, a chart of opportunities won at different stages.

2. On the **Activities** tab, create a *Note* activity and specify information about price and discount negotiations that you have conducted.

After you have saved the changes, you can create a financial document—that is, an invoice—based on the opportunity.

5. Create an Invoice

On the **Opportunities** (CR.30.40.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Opportunities**) form, do the following:

1. In the Summary area, in the **Opportunity ID** box, select *Airgas, Inc - Ready for financial strategy consulting*.
2. On the form toolbar, click **Actions** > **Create Invoice** (see the screenshot below).

Opportunity ID: 000018 * Class ID: DIRECT - Di
 Status: Won Business Account: AIRGAS - Air
 Reason: Price Location: MAIN - - Prim
 Stage: Prospect Contact: Graff Leslie, Mr.

Actions: Create Account, Create Sales Order, **Create Invoice**

Figure: Create Invoice action

The **Invoices and Memos** (AR.30.10.00) form opens; it is filled in with the data from opportunity details.

As a result, a new invoice is created; you can adjust its details and further process it according to the workflow used in your company.

6. Set Up Email Notifications

Each time a new invoice is created, the company's chief financial officer, *Joseph White*, should receive a notification by email. To set up notifications, open the **Automation Notifications** (SM.20.50.40; **System > Automation > Manage > Automation Notifications**) form, and proceed in a way similar to that described in [Step 3.1: Assigning Leads to Owners](#) (see section 3: [Set Up Email Notifications](#)).

Related Links

[Managing Opportunities](#)

[Lead Conversion](#)

[Business Accounts](#)

[Opportunities \(CR.30.40.00\)](#)

[Invoices and Memos \(AR.30.10.00\)](#)

[Automation Notifications \(SM.20.50.40\)](#)

Step 5.3: Controlling the Processing Results

To complete this step, you need to log in to Acumatica ERP as Chris Black, the sales manager. Use the following credentials:

- **Username:** Chris
- **Password:** 123

To control the results of opportunity processing, proceed as follows:

1. Navigate to **Organization > Customer Management > Work Area > Enter > Opportunities > Opportunity Summary**.

The **Opportunity Summary** customized inquiry form opens.

2. For each listed employee, analyze the following values:
 - **Open Opportunities:** This is the number of opportunities that the owner is currently processing. When this number is unreasonably large, it indicates that the employee is either too loaded with work, or neglects assigned opportunities.
 - **Open Opportunities Average Probability:** This is the mean probability value of all open opportunities assigned to a certain owner.
 - **Total of Open Opps:** The summarized expected total of all open opportunities assigned to a certain owner.
 - **Weighted Total of Open Opps:** The summarized expected total of all open opportunities assigned to a certain owner multiplied by probability; calculated for each opportunity, and then summed up.
 - **Number of Closed Deals:** The number of deals that a certain employee has closed during the last month.
 - **Closed Deals Total Amount:** The total amount of sales based on opportunities won during the last month.

Related Links

[Assignment Rules](#)

[Opportunities \(CR.30.40.00\)](#)

Additional Information

You can use the following information for additional reading, but these concepts are outside of the scope of this course.

Sales Orders

When the *Distribution* feature is enabled for your company, you can create sales orders based on your opportunities. To learn more about sales orders, see [Sales Order Types](#).

Invoices

When you win an opportunity and close the deal, you can create an invoice based on the opportunity. This is one of the aspects of how the Customer Management and Accounts Receivable modules integrate. For more information on invoices in the Accounts Receivable module, see [Invoices and Memos](#).

Lesson Summary

In this lesson, you have learned how to assign new opportunities to owners. You have associated an opportunity with a customer account, specified the services that are the subject of the potential deal, and closed a deal by winning an opportunity. Also, you have learned how to create an invoice associated with a won opportunity. Finally, you have learned which tools you can use to monitor performance of opportunity owners and to forecast future revenue for any financial period.

Now you know how you can use the Customer Management module of Acumatica ERP to optimize your sales and maximize revenue.

Lesson 6: Support Cases

MyCompany needs to be able to quickly access information about any incident, route it to the person that can best address the issue, and keep customers informed of the progress of their service request.

In Acumatica ERP, cases (also known as tickets) are used to record customer requests, problems, complaints, and other inquiries received by email, phone, fax, or any other medium.

In Acumatica ERP, each request can be characterized by a wide variety of related information, such as the following:

- **Basic information:** This information includes the customer, the contact, the case class, the status of the case, a subject and description of the case, and the date the case is reported.
- **Ownership details:** The case can be assigned to both a workgroup and an individual owner within the group.
- **Contract:** Contract cases require specifying the contract on entry. In this lesson, we do not use contracts.
- **Timing information:** The person working on the case can enter an estimate of the time to be spent on the case. Actual hours spent (broken down into work hours, overtime hours, billable work hours, and billable overtime hours) can be recorded later.
- **Severity and priority:** The severity assigned to the case may also relate to a time requirement—the reaction time and SLAs defined by the case class. In this course, you will not define the reaction time. Priorities are generally used to escalate the processing of the cases. If you assign a color code to each priority level, the cases will be displayed on the user dashboard highlighted according to their priorities.
- **Related cases and relations:** A case might have other related cases. It might also have employees and customers assigned who take part in making decisions concerning the case.

In this lesson, you will perform the following tasks:

1. Define a class for support cases and specify it as the default case class in the Customer Management module preferences (see [Step 6.1: Defining a Case Class](#)).

A case class, as with other classes used in Acumatica ERP, is a tool for grouping and classifying cases by common characteristics. Also, you use case classes as templates when you create new cases.

2. Register a new case in the system (see [Step 6.2: Registering a Case](#)).

In order to reduce expenses, *Airgas Inc.*, MyCompany's customer, has followed the recommendations of MyCompany's consultants and reduced its staff by half, but the results are not satisfactory. Now they want your specialists to analyse the situation and to conclude whether other improvements can be made in their organizational processes.

In this lesson, you will manually register their request as a support case by using the **Cases** (CR.30.60.00) form.



You can register a case by using the **Cases** tab on the **Contacts** (CR.30.20.00) or **Business Accounts** (CR.30.30.00) forms. Also, you can configure the incoming mail processing functionality by using the **System Email Accounts** (SM.20.40.02) form to enable automatic creation of cases based on incoming emails.

3. Assign the case to an owner (see [Step 6.3: Assigning the Case to an Owner](#)).

You can automatically assign cases (one at a time or in bulk) by using an assignment map; to do this, you have to define the criteria that you can use to distribute cases among your support specialists. However, in this lesson, you will manually assign the new case to an owner.

4. Process the case (see [Step 6.4: Processing the Case](#)).

Case processing involves the following activities by the assigned specialist: analyzing the issue, finding a solution, implementing the solution, and closing the case. You will create an activity

and associate it with the case to record information about all stages through which the case has progressed. The customer should be notified when the case has been resolved.

5. Release the case (see [Step 6.5: Releasing the Case](#)).

After the case has been resolved, you can release it. Releasing a case means that the associated customer will be invoiced according to case properties. You can release only billable cases.

6. Monitor the efficiency of the support team (see [Step 6.6: Monitoring Support Efficiency](#)).

You can use inquiry forms or dashboards to monitor the efficiency of your support employees.

Lesson Objectives

In this lesson, you will learn the basic procedures of processing support cases. You will do the following:

- Create a class for support cases
- Register a case in the system
- Assign the case to an owner
- Set up email notifications
- Resolve the case
- Release the case
- Monitor support efficiency

Step 6.1: Defining a Case Class

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. *Define a case class* for billable support cases. This class will be used by the system as the default case class.
2. *Specify the created case class as the default case class* in the Customer Management module preferences.

1. Define a Case Class

Open the **Case Classes** (CR.20.60.00; **Organization > Customer Management > Configuration > Setup > Case Classes**) form, and proceed as follows:

1. In the Summary area of the form, specify the following information:
 - **Case Class ID:** *SUPPORT*
 - **Description:** *Support cases*
 - **Internal:** Selected
2. On the **Details** tab, specify the following information:
 - **Require Customer:** Selected
 - **Require Contact:** Selected
 - **Default Email Account:** System email account
 - **Billable:** Selected
 - **Billing Mode:** *Per Case*
 - **Labor Item:** *LABOREXP*
 - **Overtime Labor Item:** *LABOREXP*

The selected **Require Customer** and **Require Contact** check boxes indicate that a customer and a contact should be specified for each new case; otherwise, the user will not be able to register the case. The customer associated with a case of the class will be invoiced directly when the case is closed and released.



In this course, you can use only the *Per Case* billing mode because the *Contract Management* feature, which is required for the *Per Activity* billing mode, is disabled and you cannot associate your cases with contracts.

In the **Default Email Account** box, you select the system email account that the system will use for automatic emails related to cases.

In the **Labor Item** and **Overtime Labor Item** boxes, you select the non-stock inventory items that will be used as the source of labor cost and prices and overtime labor cost and prices, respectively.

3. On the form toolbar, click **Save**.

In this lesson, you will not use attributes for cases.

2. Specify Module Preferences

Open the **Customer Management Preferences** (CR.10.10.00; **Organization > Customer Management > Configuration > Setup > Customer Management Preferences**) form, and proceed as follows:

1. On the **General Settings** tab, in the **Default Case Class** box, select *SUPPORT*.
2. On the form toolbar, click **Save**.

Related Links

[Classes and Attributes](#)

[To Create a Case Class](#)

[Case Classes \(CR.20.60.00\)](#)

[Customer Management Preferences \(CR.10.10.00\)](#)

Step 6.2: Registering a Case

In this step, you will manually register a case. Open the **Cases** (CR.30.60.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Cases**) form, and proceed as follows:

1. Create a new record and specify the following information in the Summary area of the form:

- **Business Account:** AIRGAS
- **Contact:** *Leslie Graff*
- **Subject:** Airgas Inc - Extra analysis of organizational processes

The *SUPPORT* case class is selected by default as specified on the **Customer Management Preferences** (CR.10.10.00) form.

2. On the **Details** tab, in the Editor area, type a description of the request—for example:

Following the recommendations of our consultants, the customer has reduced their staff by half, but the results are not satisfactory. Now they want us to analyse the situation and to conclude whether other improvements can be made in their organizational processes.

3. On the form toolbar, click **Save**.

Now the case is ready to be assigned to a support specialist.

Related Links

[Managing Cases](#)

[To Create a Case](#)

[Cases \(CR.30.60.00\)](#)

Step 6.3: Assigning the Case to an Owner

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. [Manually assign the new case to an owner](#), Maria Rodgers.
2. [Set up email notifications](#) for owners.

1. Assign the Case to an Owner

Open the **Cases** (CR.30.60.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Cases**) form, and proceed as follows:

1. In the Summary area of the form, in the **Case ID** box, select the case that you created in the previous step.
2. In the Summary area, specify the following information:
 - **Owner:** *Maria Rodgers*
 - **Status:** *Open*
 - **Reason:** *In Process*
3. On the form toolbar, click **Save**.

Set Up Email Notifications

Each time, when assigned to a new case, an support specialist should receive a notification by email. To set up notifications, open the **Automation Notifications** (SM.20.50.40; **System** > **Automation** > **Manage** > **Automation Notifications**) form, and proceed in a way similar to that described in [Step 3.1: Assigning Leads to Owners](#) (see section 3: [Set Up Email Notifications](#)).

Related Links

[Assignment Rules](#)

[Case Assignment](#)

[Automation Notifications \(SM.20.50.40\)](#)

Step 6.4: Processing the Case

To complete this step, you need to log in to Acumatica ERP as Maria Rodgers, the support manager. Use the following credentials:

- **Username:** Maria
- **Password:** 123

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. [Record information](#) about all processing stages through which the case progresses.
2. [Resolve and close the case](#).
3. [Set up email notifications](#) for customers.

1. Record Information About Case Processing

Open the **Cases** (CR.30.60.00; **Organization > Customer Management > Work Area > Enter > Cases**) form, and proceed as follows:

1. In the Summary area of the form, in the **Case ID** box, select the case that you created in [Step 6.2: Registering a Case](#).
2. On the table toolbar of the **Activities** tab, click **Add Activity > Add Work Item**.
The **Activity** form opens in a pop-up window.
3. In the Summary area of the form, specify the following information:
 - **Summary:** Preliminary estimation of organizational processes
 - **Owner:** Maria Rodgers
4. In the Editor area, type a description of the activities that you have performed to resolve the request—for instance:

The situation has been analyzed, preliminary estimation of organizational processes shows that the customer needs to be consulted on performance improvement.
5. On the form toolbar, click **Save & Close**.

2. Close the Case

To close the resolved case, do the following:

1. On the **Additional Info** tab of the **Cases** (CR.30.60.00; **Organization > Customer Management > Work Area > Enter > Cases**) form, select the **Manual Override** check box, and then, in the **Billable Time** box, specify 10 h 00 m.
2. In the Summary area of the form, select the following values:
 - **Status:** *Closed*
 - **Reason:** *Resolved*
3. On the form toolbar, click **Save**.

3. Set Up Email Notifications

When a case has been resolved, the customer should receive a notification by email. To set up notifications, open the **Automation Notifications** (SM.20.50.40; **System > Automation > Manage > Automation Notifications**) form, and proceed as follows:

1. In the Summary area of the form, specify the following information:
 - **Screen ID:** *Cases (Organization>Customer Management>Work Area>Enter>Cases)*
 - **Description:** *Case has been resolved*
 - **Active:** Selected
 - **Public:** Cleared
 - **Subject:** *Case ((Case.CaseID)) has been resolved*
 - **Data Source:** *None*
2. On the **Message** tab, in the text area, type the following message:


```
Dear ((Case.ContactID)),
Case ((Case.CaseID)) has been resolved; please verify!
Sincerely yours, [your name]
```

The customer will see this message in the body of the notification email, with relative data automatically specified in place of placeholders.
3. On the **Conditions** tab, add a row with the following information:
 - **Active:** Selected
 - **Field Name:** *Reason*
 - **Condition:** *Equals*
 - **Value:** *Resolved*
4. On the **Addresses** tab, edit the existing row as follows:
 - **Active:** Selected
 - **Source:** *Document*
 - **Email:** *Contact->Email*
5. On the **Fields** tab, add a row with the following information:
 - **Active:** Selected
 - **Field Name:** *Reason*
6. On the form toolbar, click **Save**.

Related Links

[Case Processing](#)

[Tasks, Events, and Activities](#)

[Cases \(CR.30.60.00\)](#)

[Automation Notifications \(SM.20.50.40\)](#)

Step 6.5: Releasing the Case

In this step, you will release the resolved case. In Acumatica ERP, you can release billable cases either one at a time from the **Cases** (CR.30.60.00) form or in batches from the **Release Cases** (CR.50.70.00) form. Use any of the following methods:

- Open the **Cases** (CR.30.60.00; **Organization** > **Customer Management** > **Work Area** > **Enter** > **Cases**) form, and proceed as follows:
 1. In the Summary area of the form, in the **Case ID** box, select the case that you closed in the previous step.
 2. On the form toolbar, click **Actions** > **Release**.
- Open the **Release Cases** (CR.50.70.00; **Organization** > **Customer Management** > **Processes** > **Daily** > **Release Cases**) form, and proceed as follows:
 1. In the unlabeled column in the grid, select the check box for the case that you want to release.
 2. On the form toolbar, click **Process**.

As a result, an invoice is created for the customer whose account is associated with the case.

Related Links

[To Release a Case](#)

[Cases \(CR.30.60.00\)](#)

[Release Cases \(CR.50.70.00\)](#)

Step 6.6: Monitoring Support Efficiency

To monitor the efficiency of your support team, open the **Cases** (CR.40.50.00; **Organization** > **Customer Management** > **Work Area** > **Explore** > **Cases**) form, and use combinations of filters to view necessary data.

By using this form, you can obtain information of the following nature:

- List of unassigned cases
- List of cases pending the customer's feedback
- List of cases sorted by their age or resolution time
- Lists of cases sorted by customer, owner, or workgroup

To view data presented graphically, you can create dashboards based on the information that is displayed on this form.

Related Links

[Assignment Rules](#)

[Cases \(CR.30.60.00\)](#)

Additional Information

You can use the following information for additional reading, but these concepts are outside of the scope of this course.

Time Activities

You can use time tracking for your activities to facilitate the process of labor tracking and costing. For instance, with time activities, you can bill cases based on the billable time spent on related activities. For details, see [Time Tracking for Activities](#).

Contracts

When you use the *Contract Management* feature, you can associate your cases with contracts of various types. For a comprehensive review of contracts, see [Managing Contracts](#).

Project Tasks

When the Project Management feature is enabled for your company, you can associate your cases and activities with projects and project tasks. For more information, see [Projects and Tasks](#).

Approvals

When a task that is associated with a case or activity requires approval, you cannot complete the case or activity. For information about approvals, see [Approval of Projects and Project-Related Activities](#).

Lesson Summary

In this lesson, you have learned how to register new cases in the system and assign them to appropriate support specialists. You have processed a case, recorded all related information by creating an associated activity, and then closed the resolved case. You have also released the case, which resulted in invoicing the customer. Also, you have learned how you can monitor the efficiency of your support team.

Now you know the basic principles of how you can process support cases by using the Customer Management module of Acumatica ERP.