



# C100 Configuring CRM Functionality

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# Introduction

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This purpose of this webinar is to demonstrate the process of configuring the Customer Relationship Management (CRM) module to attendees.

This Webinar consists of lessons which will guide you through the step-by-step process required to complete the basic setup of Acumatica's CRM module.

## **For each Lesson:**

- Discuss the scenario presented for each lesson.
- Highlight key points, terminology and best practices
- Perform the exercises

# Timing and Agenda

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**May 19, 2021 -10 AM -11 AM**

**Day 1**

**Lesson 1.1: Configuring a Company Without Branches**

**Lesson 1.2: Configuring Basic CRM Functionality**

**Lesson 2.1: Defining Lead Classes**

**Lesson 2.2: Defining Contact Classes**

**Lesson 2.3: Defining Business Account Classes**

**Lesson 2.4: Defining Campaign Classes**

**Lesson 2.5: Defining Opportunity Classes**

**May 20, 2021 -10 AM -11 AM**

**Day 2**

**Lesson 2.6: Defining Case Classes**

**Lesson 3: Configuring Duplicate Validation**

**Lesson 4: Configuring Assignment Maps**

# Day 1

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# Lesson 1: Performing Basic Configuration of CRM Functionality

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Enable the default set of features before you start the configuration of a company
- Perform the configuration of a company without branches

# Company Without Branches: To Configure a Company Without Branches

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## Story

Suppose that as an administrator, you are going to start configuring a new company without branches in Acumatica ERP. The company is going to use the default features. You need to enable these features and then you need to configure a company entity in Acumatica ERP for the SweetLife Fruits & Jams company, which at this time has only one office in New York.

# Lesson 1.2: Configuring Basic CRM Functionality

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## Learning Objectives

In this lesson, you will do the following:

- Develop an understanding of the tasks that must be performed for initial configuration of an Acumatica ERP instance
- Become familiar with the features supporting CRM functionality
- Review the numbering sequences for the CRM entities: opportunities, cases, mass emails, marketing campaigns, and sales quotes
- Enable the feature required for the setup of CRM functionality
- Review and save the predefined basic settings for the CRM functionality

## Lead Classes

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Leads may be grouped into classes based on specific characteristics.

A lead class is a grouping entity for leads that share at least one common characteristic.

Lead classes are used for reporting purposes and for providing default values during data entry of individual leads.



## Lead Classes – Applicable Scenarios

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You may want to create Lead Classes when:

- You need to give users the ability to group leads that represent companies of the same industry, such as banks, supermarkets, or pharmacies.
- You need to give users the ability to group leads that represent companies of the same business sector, such as manufacturers, merchandisers, or service providers.
- You need to give users the ability to group leads that have been acquired through such sources as an organic search, a marketing campaign, or a purchased list.
- You need to set up the system to automatically assign new leads to the appropriate owners.

# Configuring CRM Functionality: Implementation Activity

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## Story

Suppose that you, as the system administrator of the SweetLife Fruits & Jams company, need to configure the minimum settings required for using the CRM functionality in the system.

# Lesson 2.1: Defining Lead Classes

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Create a lead class
- Select the lead class that the system will use by default for each new lead

# Lead Classes: Implementation Activity

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## Story

Suppose that you are an implementation consultant for the SweetLife Fruits & Jams company, and you need to create a new lead class, *MALL*, and make it the default class to be specified for each newly created lead. This class will be used for SweetLife's leads that represent employees from large shopping centers.

## Contact Classes

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Contacts may be grouped into classes to gather different sets of additional information about the contacts.

You can define classes to classify information based on a company's business needs to get a comprehensive view of the business from leads to revenue.

Contact classes helps to quickly assign contacts to owners, enter the settings of leads, business accounts, and opportunities created based on the contact, and define a default email account for sending emails to contacts.

## Contact Classes – Applicable Scenarios

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You may want to create a contact class in scenarios that include the following:

- You need to give users the ability to group contacts that represent companies of the same industry, such as banks, supermarkets, or pharmacies.
- You need to give users the ability to group contacts that represent companies of the same business sector, such as manufacturers, merchandisers, or service providers.
- You need to give users the ability to group contacts that have been acquired through such sources as organic search, marketing campaign, or purchased list.
- You need to set up the system to automatically assign new contacts to the appropriate owners.

# Lesson 2.2: Defining Contact Classes

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Create a contact class
- Select the contact class that the system will use by default for each new contact

# Contact Classes: Implementation Activity

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## Story

Suppose that you are an implementation consultant for the SweetLife Fruits & Jams company, and you need to create a new contact class, *OFFICE*, and make it the default class to be specified for each newly created contact. This class will be used for SweetLife's contacts that represent employees from business organizations that regularly order company products and services.



## Business Account Classes

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A business account class is a grouping entity for business accounts that share at least one common characteristic.

Business account classes are used for reporting purposes and for providing default values during data entry of individual business accounts.

## Business Account Classes – Applicable Scenarios

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You create Business Account Classes in scenarios when:

- You need to give users the ability to group business accounts that represent companies of the same industry, such as banks, supermarkets, or pharmacies.
- You need to give users the ability to group business accounts that represent companies of the same business sector, such as manufacturers, merchandisers, or service providers.
- You need to set up the system to automatically assign new business accounts to the appropriate owners.

# Lesson 2.3: Defining Business Account Classes

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Create a business account class
- Select the business account class that the system will use by default for each new business account

# Business Account Classes: Implementation Activity

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## Story

Suppose that you are an implementation consultant for the SweetLife Fruits & Jams company, and you need to create a new business account class, *BIGSTORE*, and make it the default class to be specified for each newly created business account. This class will be used for SweetLife's business accounts that represent supermarket chains.

## Campaign Classes

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Campaign Classes allows users to group marketing campaigns into classes based on specific characteristics.

Accurately grouping campaigns into classes will help you quickly and effectively manage your marketing and sales processes, including the creation of marketing campaigns, the tracking of expenses related to a marketing campaign and viewing of campaign statistics.

## Campaign Classes – Applicable Scenarios

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You create a campaign class in scenarios that include the following:

- You need to give users the ability to group campaigns of various types, such as marketing events, mass mailing, and outdoor advertising.
- You need to give users the ability to group marketing and sales campaigns.

# Lesson 2.4: Defining Campaign Classes

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## Learning Objectives

In this lesson, you will learn how to create a campaign class.

# Campaign Classes: Implementation Activity

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## Story

Suppose that you are an implementation consultant for the SweetLife Fruits & Jams company, and you need to create a new campaign class, *BANNER*. This class will be used for SweetLife's marketing campaigns that are devoted to billboard advertising of company products and services.



## Opportunity Classes

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An opportunity class is a grouping entity for opportunities that share at least one common characteristic.

Opportunity classes are used for reporting purposes and for providing default values during data entry of individual opportunities.

Opportunity classes also make the creation of opportunities faster and more accurate.

## Opportunity Classes – Stages & Probabilities

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An opportunity, when processed by a salesperson, progresses through various stages. At any particular stage, there is a certain probability that the deal can be successfully closed. By using probabilities and stages, sales teams can estimate future sales revenue in the system at any time.

## Opportunity Classes – Applicable Scenarios

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An opportunity class is a grouping entity for opportunities that share at least one common characteristic.

Opportunity classes are used for reporting purposes and for providing default values during data entry of individual opportunities

# Lesson 2.5: Defining Opportunity Classes

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Use opportunity classes and attributes
- Define opportunity stages
- Create an opportunity class
- Select the opportunity class that the system will use by default for each new opportunity

# Opportunity Classes: Implementation Activity

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## Story

Suppose that you are an implementation consultant for the SweetLife Fruits & Jams company, and you need to create a new opportunity class, *RENEW*, and make it the default class to be specified for each newly created opportunity. This class will be used for SweetLife's renewal opportunities with long-term customers.

## Day 2

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# Timing and Agenda

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Day 1

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May 20, 2021 -10 AM -11 AM

Day 2

**Lesson 2.6: Defining Case Classes**

**Lesson 3: Configuring Duplicate Validation**

**Lesson 4: Configuring Assignment Maps**

## Case Classes

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A case class is a grouping entity for cases that share at least one common characteristic.

Case classes help you gather different sets of additional information about the cases in each class, and they can be used for reporting purposes and for providing default values during the data entry of individual cases.



## Case Classes – Learning Objective

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In this lesson, you will learn how to do the following:

- Develop a general understanding of the settings for case classes
- Create a case class
- Specify the case class that the system will use by default for each new case

## Case Classes – Applicable Scenarios

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You may to create a case class in scenarios when:

- You need to give users the ability to group cases that represent customer requests of the same type, business area, or product, such as service requests, support tickets, or requests for information about products or services.
- You need to give users the ability to group cases that represent requests submitted by employees of a particular customer.
- You need to set up the system to automatically assign new cases to the appropriate owners.

# Lesson 2.6: Defining Case Classes

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Develop a general understanding of the settings for case classes
- Create a case class
- Specify the case class that the system will use by default for each new case

# Case Classes: Implementation Activity

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## Story

Suppose that you are an implementation consultant for the SweetLife Fruits & Jams company, and you need to create a new case class, *JMAINT*, for cases that represent customer requests for maintenance of juicers. You also need to define the default class to be specified for each newly created case.

## Duplicate Validation – Learning Objectives

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In this Lesson, you will learn the following:

- Configure duplicate validation for leads, contacts, and business accounts
- Calculate validation scores (grams) for leads, contacts, and business accounts

## Duplicate Validation

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Acumatica provides flexible tools for eliminating duplicate records.

When a new Lead, Contact, or Business Account is created in the system, Acumatica ERP can check a record for duplicates automatically or at the request of the user.

# Lesson 3: Configuring Duplicate Validation

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Configure duplicate validation for leads, contacts, and business accounts
- Calculate validation scores (grams) for leads, contacts, and business accounts

# Figure: Example of duplicate validation rules

Customer Management Preferences

NOTES FILES CUSTOMIZATION TOOLS

GENERAL SETTINGS **DUPLICATE VALIDATION SETTINGS** MAILING SETTINGS

4 Lead and Contact Validation Score Threshold: 5.00

5 Lead and Account Validation Score Threshold: 6.00

6 Account Validation Score Threshold: 5.00

Close Leads with no Activities with Score Higher Than: 6.00

Validate Leads and Contacts for Duplicates on Entry  
 Validate Accounts for Duplicates on Entry

**LEAD AND CONTACT VALIDATION RULES** LEAD AND ACCOUNT VALIDATION RULES ACCOUNT VALIDATION RULES

1 *Matching Field	2 Score Weight	Transformation Rule	3	Create on Entry
> Email	5.0000	None		Warn
First Name	1.0000	None		Allow
Account Name	1.5000	Split Words		Allow
Last Name	2.0000	None		Allow
Phone 1	0.5000	None		Allow
Web	0.5000	Domain Name		Allow



# Figure: Example of duplicate validation rules for leads and contacts

## Customer Management Preferences

NOTES FILES CUSTOMIZATION TOOLS

GENERAL SETTINGS **DUPLICATE VALIDATION SETTINGS** MAILING SETTINGS

6 **Lead and Contact Validation Score Threshold:** 5.00  
Lead and Account Validation Score Threshold: 6.00  
Account Validation Score Threshold: 5.00  
Close Leads with no Activities with Score Higher Than: 6.00

7  Validate Leads and Contacts for Duplicates on Entry  
 Validate Accounts for Duplicates on Entry

**LEAD AND CONTACT VALIDATION RULES** LEAD AND ACCOUNT VALIDATION RULES ACCOUNT VALIDATION RULES

Refresh Add Remove Filter Search

3 * Matching Field	5 Score Weight	Transformation Rule	1 Create on Entry
> Email	5.0000	None	Warn 4
First Name	1.0000	None	Allow 2
Account Name	1.5000	Split Words	Allow
Last Name	2.0000	None	Allow
Phone 1	0.5000	None	Allow
Web	0.5000	Domain Name	Allow

# Figure: Example of duplicate validation rules for business accounts

Customer Management Preferences

NOTES FILES CUSTOMIZATION TOOLS

GENERAL SETTINGS **DUPLICATE VALIDATION SETTINGS** MAILING SETTINGS

Lead and Contact Validation Score Threshold: 5.00

Lead and Account Validation Score Threshold: 6.00

**5** Account Validation Score Threshold: 5.00

Close Leads with no Activities with Score Higher Than: 6.00

Validate Leads and Contacts for Duplicates on Entry

**6**  Validate Accounts for Duplicates on Entry

LEAD AND CONTACT VALIDATION RULES LEAD AND ACCOUNT VALIDATION RULES **ACCOUNT VALIDATION RULES**

* Matching Field	Score Weight	Transformation Rule	<b>1</b>	Create on Entry
> EMail <b>8</b>	5.0000	None	<b>7</b>	Block
FullName <b>4</b>	5.0000	Split Words	<b>3</b>	Warn
Phone1	1.0000	None	<b>2</b>	Allow
Phone2	1.0000	None		Allow
WebSite	1.0000	Domain Name		Allow

# Duplicate Validation – Calculation of Validation Scores

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Validation Scores are calculated automatically if the Lead/Contact Duplicate Validation feature is enabled on the Enable/Disable Features

Acumatica uses grams for the calculation of validation scores for each lead, contact, or business account.

Each record has several fields, such as Last Name, Email, or Class ID that can be identified for validation. The grams value assigned to a particular record is defined by the total score weight of fields that are involved in the calculation of the validation score.

# Duplicate Validation – Calculation of Validation Scores

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You need to recalculate validation scores on the Calculate Grams form in the following cases:

- Validation rules have been changed on the **Duplicate Validation Settings** tab of the Customer Management Preferences form.
- A batch of new records was imported into Acumatica ERP before the Lead/Contact Duplicate Validation feature was enabled.

# Duplicate Validation: Implementation Activity

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## Story

Suppose that you, as an implementation consultant for the SweetLife Fruits & Jams company, need to review and modify duplicate validation settings in Acumatica ERP in order to provide the user with the following abilities:

- To validate each lead, contact, or business account when a new record is saved for the first time.
- To validate leads and contacts for duplicates by comparing only email addresses of these leads and contacts on entry (before a new record is saved for the first time).
- To check business accounts for duplicates on entry and prevent creating business accounts that have identical emails.

## Assignment Maps

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Assignment maps in Acumatica ERP give marketing, sales, and support personnel the ability to automatically distribute records such as; leads, opportunities, or cases—between owners (individuals) and workgroups (groups of people).

When a user assigns a record or a group of records to an owner or a workgroup on a mass-processing form, the system uses rules and conditions specified in an assignment map.

## Assignment Maps – Learning Objectives

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you will learn how to do the following:

- Become familiar with the principles and workflow of configuring assignment maps
- Create a lead assignment map
- Specify a default lead assignment map in the system
- Create an opportunity assignment map
- Specify a default opportunity assignment map in the system
- Create a case assignment map
- Specify a default case assignment map in the system

## Assignment Maps Applicable Scenarios

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You may want to configure an assignment map in scenarios that include the following:

- You need to give users the ability to distribute leads that represent various industries or businesses between your company employees.
- You need to give users the ability to distribute opportunities for selling various kinds of products or services your company offers.
- You need to give users the ability to distribute various cases for presales questions, cases for sale and delivery of company products, and cases for maintenance and repair.



# Lesson 4: Configuring Assignment Maps

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Become familiar with the principles and workflow of configuring assignment maps
- Create a lead assignment map
- Specify a default lead assignment map in the system
- Create an opportunity assignment map
- Specify a default opportunity assignment map in the system
- Create a case assignment map
- Specify a default case assignment map in the system

# Assignment Maps: To Configure a Lead Assignment Map

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## Story

Suppose that you, as an implementation consultant for the SweetLife Fruits & Jams company, need to configure a lead assignment map in Acumatica ERP in order to provide the marketing team with the ability to assign groups of leads to owners as follows:

- The *Marketing Stores* workgroup will be working with leads that represent supermarkets and other stores.
- The *Marketing Food Services* workgroup will be working with leads that represent restaurants, cafes, bakeries, and other food service companies.

# Assignment Maps: To Configure an Opportunity Assignment Map

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## Story

Suppose that you, as an implementation consultant for the SweetLife Fruits & Jams company, need to configure an opportunity assignment map in Acumatica ERP in order to provide the sales team with the ability to assign groups of opportunities to owners as follows:

- The *Product Sales* workgroup will be working with opportunities for selling company products, such as jam, fruits, and juicers.
- The *Project Sale* workgroup will be working with opportunities for conducting trainings and workshops for customers, such as cleaning and maintenance of juicers.

# Assignment Maps: To Configure a Case Assignment Map

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## Story

Suppose that you, as an implementation consultant for the SweetLife Fruits & Jams company, need to configure a case assignment map in Acumatica ERP in order to provide the customer support team with the ability to assign cases to owners as follows:

- The employee *David Chubb*, a sales manager in SweetLife, will be working with cases for presales questions from potential clients and customers.
- The *Delivery* workgroup will be working with cases for sale and delivery of company products, such as jam, fruits, and juicers.
- The *Technical Support* workgroup will be working with cases for cleaning, maintenance, and repair of juicers. This workgroup will also help answer all kinds of technical questions from potential clients and customers.



# Thank you

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**Mark Lauderdale**