C100 Customer Management (CRM)

CRM Basics

Nancy Carriere

Partner Enablement Manager

Acumatica
The Cloud ERP

Agenda

Mon, Jul 23, 2018 9:00 AM - 11:00 AM PDT

Day 1: Configuration of Acumatica ERP: Lesson 1 & 2

Marketing Operations: Lesson 3

Tue, Jul 24, 2018 9:00 AM - 11:00 AM PDT

Day 2: Marketing Operations: Lesson 4 & 5

Sales Operations: Lesson 6

Wed, Jul 25, 2018 9:00 AM - 11:00 AM PDT

Day 3: Sales Operations: Lesson 7

Support Operations: Lesson 8

Thu, Jul 26, 2018 9:00 AM - 11:00 AM PDT

Day 4: Reporting: Lesson 9

Customer Portal: Lesson 10

Review Session

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Session Rules

- All attendees will be in Mute mode.
- Polling questions will be asked at random moments, without advance notice.
- If you have a question, enter it in Chat and click Raise Hand.

For each Lesson:

- Discuss the scenario presented for each lesson.
- Highlight key points, terminology & best practices
- Each student performs the exercises individually

Final Exam (certification) through Acumatica University

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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 to step by step through the basics of the configuration and use of the CRM 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 support 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.

Prerequisites

Course Prerequisites should have been completed prior to attending this course.

- You installed Acumatica version 17.204.0019 on your laptop
- Created a company with snapshot C100.zip
- The demo company has the following configuration:
  - All financial periods for years 2013 – 2017 are active
  - One lead assignment map and 2 import scenarios are added
  - Preconfigured Company Tree
- Created a Gmail account or Outlook.com account (either personal or created for training purposes)

Lesson Structure

Lesson Objectives

Steps: Practice Exercises that reinforce the Lesson Objectives

Additional Information: Links to Help topics outside the scope of this course (*)

Lesson Summary: Quick recap of the Lesson

10 Lessons Total

Overview

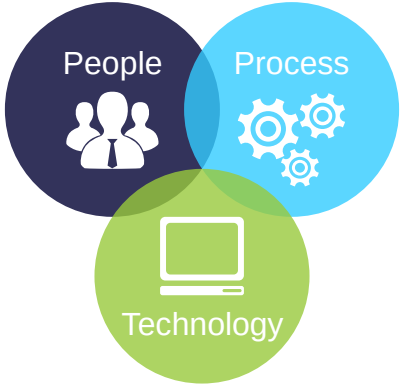
Learning Objectives:

Understand what is Customer Relationship Management, why it is important and what are the benefits of implementing a CRM solution.

Overview

What is Customer Relationship Management?

- CRM is a mindset for managing and nurturing interactions with Customers & Prospects
- Effective CRM Strategy involves 50% People, 30% Process, and 20% Tools
- Companies use a CRM application as a platform to help implement their strategy
- Acumatica's CRM is a software platform that enables companies to store intelligence about customers, while automating the maintenance of those relationships and the beginning of others



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Overview

Why is CRM Important?

- The cost of selling to an existing customer is less expensive than finding a new client
- CRM allows you to identify and concentrate on your best customers and keep them loyal
- Improves team work and keeps everyone up to date with the same information
- Identifies trends in a business easier and creates more targeted initiatives

Overview

Benefits of CRM:

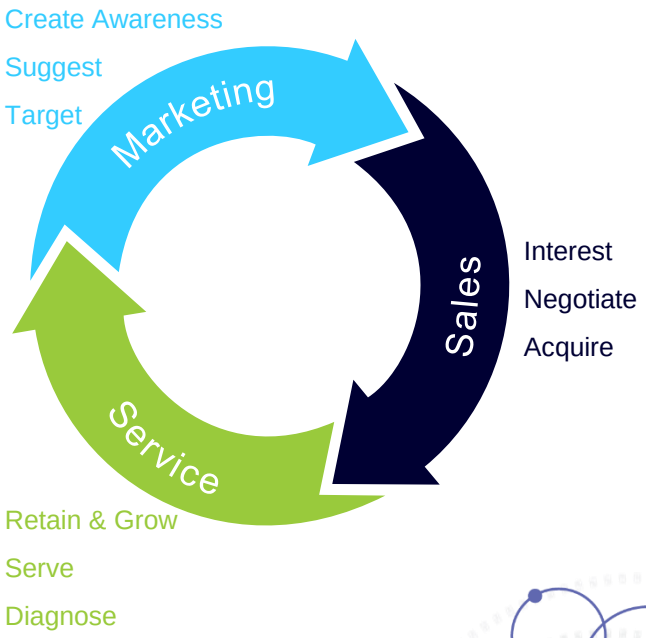
- Managing Leads, Opportunities, and Customer activities in a single system
- Standard sales qualification process
- Allows a company to be more responsive to customers with easier access to information
- Develop efficiencies by automating Lead to Opportunity processes
- Allow Sales teams to respond quicker to prospects and make more informed decisions
- Allow Customer Service Teams to be more responsive to customers and proactively identify issues to resolution

Overview

Acumatica CRM is comprised of 3 modules:

- Marketing
- Sales
- Service

CRM is designed to support customers through the Customer Lifecycle.



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Overview

Marketing:

- 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 assigning 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
- Initiate targeted marketing campaigns and track effectiveness

Overview

Sales:

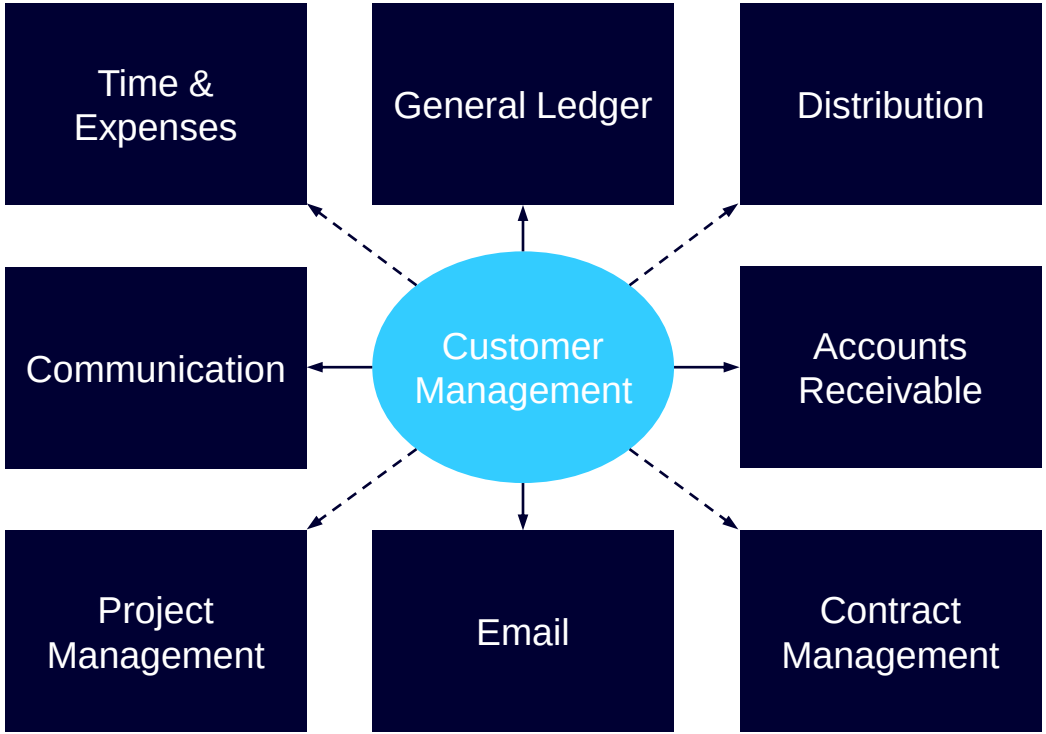
- Classify opportunities by using classes and attributes
- Assign opportunities to appropriate sales persons
- Prepare initial proposal
- Update proposals while negotiating prices and discounts
- Convert contacts to prospect business accounts that can be converted to customers
- Create Sales Orders and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

Overview

Customer Service:

- Track customer cases, includes manual entry and automatic creation of cases as a result of incoming mail processing
- Assign cases to CSR
- Process and resolve cases
- Register associated activities
- Release cases, which results in invoicing related customers
- Monitor support efficiency

Overview



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User Interface

- Modern UI vs Classic UI
- Workspaces
- Quick Menu vs All Items
- Customizing the Quick Menu
- Finding transactions on List Entry Points (Substitute Forms)
- Pin/Un-pin Workspaces

Lesson 1
Initial Configuration

Lesson 1 – Initial Configuration

MyCompany's Story

MyCompany is a small consulting firm, one legal entity that has no branches or subsidiaries and is located in one city in the US

MyCompany provides organizations with consulting services in the areas of:

- Budgeting, Financial Analysis, Financial Strategies, Forecasting
- Performance improvement, Risk and turnaround management

MyCompany segments its customers into 2 types:

- **End Customers:** Organizations that use their services
- **Referral Partners:** Partner Organizations that endorse their services

Prospects of each type are analyzed and processed differently, in accordance with the qualification process adopted by the company.

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Lesson 1 – Initial Configuration

MyCompany's Story

Marketing:

The Marketing Department generates a host of leads from a variety of sources:

- Marketing Automation Tool, provides uncategorized leads
- Purchased Lists from third parties
- Direct Phone Calls and Emails in response to campaigns
- Web site

Priorities:

- Organizing information in a meaningful manner
- Facilitate the process of assigning leads to telemarketing staff for 1st level qualification

Process

- Leads are sorted by specific criteria, then an appointed employee qualifies the lead based on their area of expertise
- If a Lead shows interest they are considered a qualified prospect. If they want to buy, they become a qualified opportunity, some leads are not currently interested and will be contacted again at a future date

Lesson 1 – Initial Configuration

MyCompany's Story

Marketing:

To increase repeated sales and to nurture leads who are not ready to buy, MyCompany needs to send out regular newsletters and special offers, as well as run frequent marketing campaigns to promote its services.

It is important for MyCompany to understand the effectiveness of these campaigns. For example, how many new leads have been generated as a result of a particular campaign.

Sales:

A Sales Opportunity goes through different stages, and each stage can be characterized by a certain probability that will result in a sale.

Priority: Improve traceability of opportunities so that the VP of Sales can easily estimate future revenue based on sales probabilities for a particular financial period.

Lesson 1 – Initial Configuration

MyCompany's Story

Customer Service:

MyCompany has a support team that needs to handle customer requests without delays.

Priorities:

- Ability to quickly access any support case.
- Route the case to the person that can best address the issue.
- Keep customers informed of the progress of their support case.

Lesson 1 – Initial Configuration

Learning Objectives:

We will cover the basic configuration steps required for work with the Customer Management Module and review the predefined configuration of the training instance.

You will do the following:

- Define Opportunity Classes
- Setup Opportunity Stages and Probabilities
- Create a Lead Assignment Map

Lesson 1 – Initial Configuration

Terminology

Class

A way to group similar types of records – such as leads, opportunities, business accounts, or cases – that share at least one common characteristic. Defining classes allows you to group and report on records of common characteristics.

Example: You might classify a lead as Business or Consumer.

Attribute

A user defined field that captures a quality or characteristic that gives your company specific information that will help promote products and services.

Example: Industry, Interested In, Organization Size, Annual Revenue, Territory, In Business Since

Lesson 1 – Initial Configuration

Attributes can be created and added to any of the following:

- Inventory Items
- Case Classes
- Contact & Lead Classes
- Business Account Classes
- Opportunity Classes
- Lead Classes

Lesson 1 – Initial Configuration

Step 1.1 Instance Configuration

- Features – Page 24
- Configuration (Common Settings) – Page 25
- Preferences – Pages 25 - 26

Lesson 1 – Initial Configuration

- Opportunity – a potential sale; opportunities build a sales pipeline
- Stages – opportunities progress through Stages (sales cycle); Stages are configurable
- Probabilities – the estimated percent chance that the deal will close; tied to Stage; probabilities are configurable.

Lesson 1 – Initial Configuration

Complete Step 1.2: Opportunity Classes (pg. 27)

1. Define Opportunity Class for Direct Sales
2. Define Opportunity Stages for Direct Sales
3. Define Opportunity Class for Partner Sales
4. Define Opportunity Stages for Partner Sales

Lesson 1 – Initial Configuration

Terminology

Lead Assignment Map

- Leads can be assigned to a telemarketer or a sales rep manually – select the appropriate person in the Owner field.
- You can automate lead assignment by setting up a Lead Assignment Map. Very useful when importing large amounts of leads.
- A Lead Assignment Map defines the rule(s) – who gets which leads
- Options are endless – can base assignments on city, state, zip code, territory, area code, type of business, etc.
- **Define the rules to cover all possible leads.** No lead left behind! ☺

Lesson 1 – Initial Configuration

Complete Step 1.3: Lead Assignment Map (pg. 29)

1. If a new lead is entered with a Source of “Purchased List” or “Referral”, assign to Jack Carrey.

2. If a new lead is entered with a Source that is NOT “Purchased List’ or “Referral”, assign to Archie Knorr.

Lesson 2
System Email Account

Lesson 2 – System Email Account

Learning Objectives:

Configure the necessary email setup to enable notification functionality and the ability to send/receive emails.

You will do the following:

- Create a new System Email Account
- Set the New Email Account as the Default Email Account
- Schedule Email Send/Receive

Lesson 2 – System Email Account

System Email Accounts

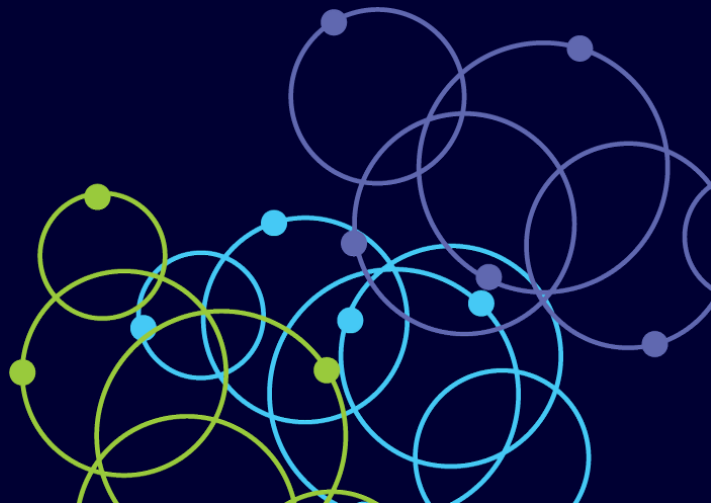
- You can have as many as you want (ex: support@myco, marketing@myco.com, etc)
- Email history is tracked – system forwards incoming emails to user; ex: support@Acumatica.com
- Default Email Account – many system email accounts; only 1 default email account.
- Send/Receive Schedule – can be defined for any time interval

Lesson 2 – System Email Account

Complete Steps 2.1, 2.2, 2.3: Configuring System Email Account (pg. 34-39)

1. Configure a new system email account
2. Setup default email account
3. Create the Send and Receive Email Schedule

Lesson 3
Leads & Contacts



Lesson 3 – Leads & Contacts

Learning Objectives:

MyCompany uses multiple sources of leads, such as purchased lists, web contacts, and phone inquiries. The leads need to be classified and assigned to a telemarketer for qualification.

You will do the following:

- Enter leads manually (via browser and mobile app)
- Import a purchased list of leads (using import scenario)
- Schedule an import of leads
- Validate leads for duplication
- Purge duplicates
- Remove leads with insufficient information
- Assign leads to Owners

Lesson 3 – Leads & Contacts

Lead:

Represents a potential customer that has not passed the first level qualification or have not met internal criteria to be converted to a customer. A lead can be qualified and converted to a sales opportunity, disqualified by temporarily suspending it, or removing it permanently, converted to a contact associated to a business account of the “Prospect” type.

5 Methods for entering Leads:

1. Manually type in
2. Import Scenarios
3. Use web services
4. Use incoming mail processing

Lesson 3 – Leads & Contacts

Import Scenarios:

- Fast way to upload large amounts of data to Acumatica.
- Defines data import instructions/mapping for the system. They are a sequence of actions to be executed for a data record as if the record is being manually entered or updated by the user through an Acumatica form.
- The same actions, and in the same order that are carried out by a user, are also carried out in a Import Scenario based on the steps you define.
- Outside of the scope of this class – you will use predefined Import Scenarios
- Acumatica University offers I100 Integration Scenarios class.

Lesson 3 – Leads & Contacts

Data Providers:

- Works hand-in-hand with an Import Scenario.
- Defines the format/type/schema of the data source. Acumatica then uses the Data Provider to transfer data from and to the external system or file.
- Outside of the scope of this class – you will use predefined Data Providers.
- Acumatica University offers I100 Integration Scenarios class.

Data providers are available for these file types:

- CSV
- Excel
- XML

Data providers available for these external systems:

- Salesforce.com
- MS SQL
- HubSpot

Data Providers available for exporting payment to external payment systems:

- ACH
- Giro Payment

Lesson 3 – Leads & Contacts

Configuration Steps for Import Scenarios:

1. **Create a Data Provider** – Stores the schema of the source file. File type and columns to be imported. Activate the data source, and all columns.

2. **Create Import Scenario** – Where you map the source data to target, and defining the sequence of actions.

3. **Run the Import Scenario** – Prepare the data, then import data. Flags any errors associated to the data.

Lesson 3 – Leads & Contacts

Mobile App

- Realtime connection to your ERP
- Enter contacts, business accounts, support cases, tasks, notes, etc.
- Available for Android and iOS.
- Install from Play Store or App Store.
- For Step 3.2 – if you don’t have a hosted instance use https://presales.Acumatica.com/nancy

Lesson 3 – Leads & Contacts

Outlook Plug-in - Access Acumatica from within Outlook!

- View details of existing Leads and Contact records
- Create new Leads and Contacts
- Create Opportunities and Cases for existing contacts
- Log Activities – notes, messages, phones calls, etc.
- Customize appearance of Acumatica ribbon in Outlook with company's branding

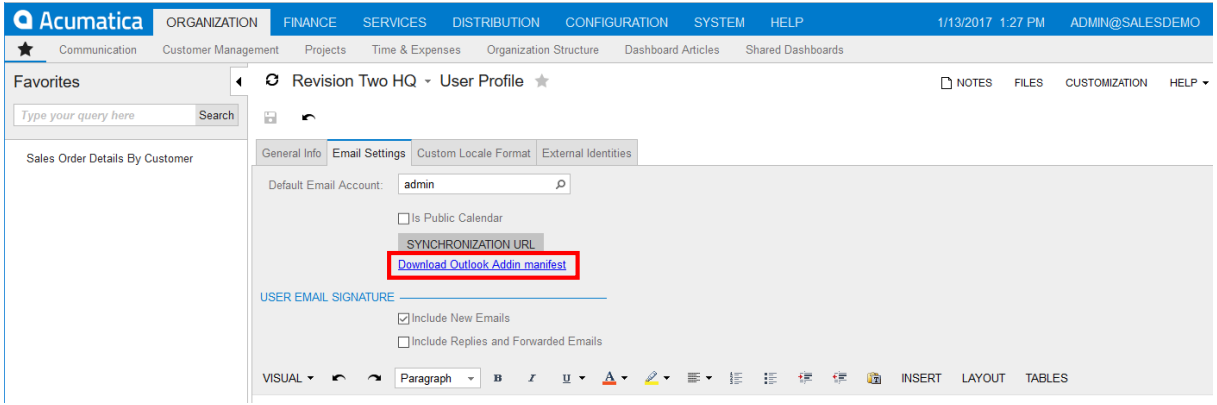
Lesson 3 – Leads & Contacts

Installing Acumatica Outlook Plug-In

Requirements:

- Office 365 or Exchange Account
- Outlook 2013 or later, or Outlook on the web
- Acumatica ERP instance must be hosted over HTTPS.

User Profile > Email Settings Tab, click on “Download Outlook Add-In Manifest”



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Lesson 3 – Leads & Contacts – Outlook Plugin

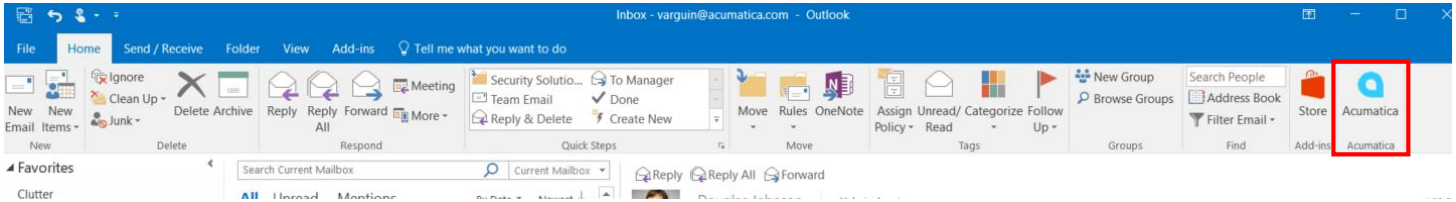
1. Sign in to Outlook Online or login to Outlook desktop

2. **Outlook Online**: Click Settings > Manage add-ins > Add from a file**.**

   Outlook desktop: File > Manage add-ins > Add from a file.

3. Select the manifest file, click **Next**, and then click **Install.** The Acumatica button is displayed on the ribbon button.

4. Click the Acumatica button. The first time you click the Acumatica button, you will be prompted to enter your Acumatica credentials.



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Lesson 3 – Leads & Contacts

Complete Step 3.1.1: Enter Leads Manually (pg. 47)

- Marketing > New Lead
- Enter leads as outlined in class manual

OPTIONAL Complete Step 3.1.2: Enter a Lead using Outlook Plug-in (pg. 47-48)

- Acumatica button > Create Lead

Day 1 Recap

Part 1 - Configuration

- Basic configuration of CRM module – most was already set up in C100 snapshot
- Set up Opportunity Classes
- Created a Lead Assignment Map
- Setup System Email Account & Default Email Account
- Scheduled Send/Receive of Email

Part 2 – Marketing Operations

- Leads
- Import/Export Scenarios and Data Providers - for importing and exporting
- Mobile app
- Outlook Plug-in
- Entering Leads manually; Entering Leads using Outlook Plug-in.

Lesson 3 – Leads & Contacts

Complete Step 3.2: Enter a lead via the mobile app (pg. 49-51)

- Install app from Play Store or App Store
- Connect to a hosted instance or use https://presales.Acumatica.com/nancy (admin/123)
- Enter a contact as outlined in class manual

Lesson 3 – Leads & Contacts

Complete Step 3.3: Importing a Purchased List (pg. 52)

In this step you will use a predefined import scenario to import a purchased list of leads.

Required:

PurchasedLeads.xlsx file

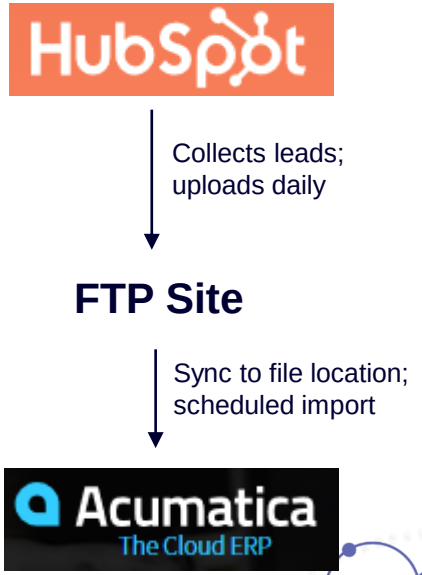
Lesson 3 – Leads & Contacts

Complete Step 3.4: Importing a List Generated by Marketing Automation (pg. 53-54)

In this step you will use a predefined import scenario to import leads.

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 My Company.

2. Schedule periodic execution of the import scenario.



<u>Required to complete exercise:</u>

MarketingLeads.xlsx file

Lesson 3 – Leads & Contacts

Duplicate Validation

In Acumatica ERP, you can validate records for duplicates. The validation process consists of the following steps:

- Leads are validated against other leads, contacts, and business accounts.
- Contacts are validated against leads, other contacts, and business accounts.
- Business accounts are validated against other business accounts.

Lesson 3 – Leads & Contacts

Duplicate Validation

Configuration for duplicate validation – already setup in class snapshot

- On Enable/Disable Features, enable the *Lead/Contact Duplicate Validation* feature

- On the **Duplicate Validation Settings** tab of the Customer Management Preferences, specify validation settings.

Lesson 3 – Leads & Contacts

Complete Exercise 3.5: Validating Leads for Duplications (pg. 54)

- Calculate grams by using the Calculate Grams form. Grams are used to calculate validation scores. Each record has a number of related parameters, such as *Last Name, Email, and Class ID.* The grams value assigned to a particular record is defined by the total number of parameters that are involved in the calculation of the validation score.
- Validate Leads
- Merge Duplicates

Lesson 3 – Leads & Contacts

Complete Exercise 3.6: Purging Closed Leads (pg. 57)

- Easy way to “clean up” your leads.

Lesson 3 – Leads & Contacts

Complete Exercise 3.7: Discarding Leads with Insufficient Contact Info (pg. 58)

- Easy way to “clean up” your leads – no email? No phone#? Get rid of them.

1. Create a Filter
2. Mass Update
3. Set Lead “Status” to Lost

Lesson 3 – Leads & Contacts

Complete Exercise 3.8: Assigning Leads to Owners (pg. 60)

1. Email notifications – so owner is alerted to new lead. **Be Careful! This can create large amounts of emails. Consider using dashboards.**
2. Assign Leads by Assignment Map – you've already created the Assignment Map (Instructions are on page 29)
3. Make sure no lead got left behind!

Lesson 4
Email, Events, Tasks, & Activities

Lesson 4 – Emails, Events, Tasks, Activities

Tracking any type of contact or correspondence with a Lead.

- Create an Email
- Create a Task
- Create an Event
- Create a Phone Call activity

Lesson 4 – Emails, Events, Tasks, Activities

Complete Exercises 4.1 – 4.4 following the steps in your class manual (pg. 66 - 71)

Lesson 5
Marketing Lists & Campaigns

Lesson 5 – Marketing Lists & Campaigns

Business Scenario 1: Nurturing Leads

MyCompany needs to keep in touch with confirmed contacts that are not ready to buy any of the currently offered services, but might be interested in future offers. Thus, contacts should be constantly reminded of MyCompany, which includes the company's sending newsletters and promotional emails and running marketing campaigns. The purpose is to stimulate feedback from contacts and boost their transition to a real opportunity.

Lesson 5 – Marketing Lists & Campaigns

Learning Objectives:

In this lesson, you will learn how to automate nurturing of contacts by performing the following tasks:

- Create a Marketing List that will be used as a source of email addresses for the company's mass emails.
- Prepare a marketing campaign.
- Send a mass email to selected contacts.

Lesson 5 – Marketing Lists & Campaigns

Marketing List:

It is a targeted list of contacts, which is used for mass-mailing campaigns, such as newsletters, or special offers.

Acumatica maintains 2 types of Marketing Lists:

- **Self-Managed Lists:** User can manually add contacts to the list
- **Dynamic Lists:** Contacts are added to the list automatically based on selection criteria

Lesson 5 – Marketing Lists & Campaigns

Complete Step 5.1: Creating a Marketing List (pg. 73)

In this step you will perform the following tasks:

1. Create a Marketing List
2. Add Members to the marketing list

Lesson 5 – Marketing Lists & Campaigns

Business Scenario 2:

MyCompany is going to launch a new marketing campaign to promote its services. During a 2 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 use Acumatica tools to automate the process. You will use the mass emailing feature for this campaign.

Lesson 5 – Marketing Lists & Campaigns

Marketing Campaigns:

- 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.
- You can classify your Campaigns by specifying Campaign Types, such as; Monthly Newsletter, Annual Spring Sale, Tradeshow blast etc…
- Campaigns typically have a start and end date.
- Manage expected revenue, budget and responses from the campaign and compare it against actuals to track the effectiveness of the campaign.
- Track number of leads generated and converted to opportunities.
- Members can be assigned to campaigns. Members are the targeted recipients of the campaign. Members are contacts who will receive emails related to the campaign; leads, prospects, and mailing list subscribers.

Lesson 5 – Marketing Lists & Campaigns

Complete Step 5.2: Preparing a Marketing Campaign (pg. 75)

In this step you will prepare a new campaign in Acumatica by performing the following tasks:

1. Create a new marketing campaign.
2. Add Campaign Members.

Lesson 5 – Marketing Lists & Campaigns

Business Scenario 4:

- Send a mass email to the members of the previously created marketing campaigns.
- In Acumatica you can prepare a mass email and send it to the 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.
- Before sending the mass email, you can test it by sending a preview email to one of your email accounts.

Lesson 5 – Marketing Lists & Campaigns

Complete Step 5.3: Sending a Mass Email (pg. 79)

In this step you will prepare and send a mass email to the members of a marketing campaign.

Day 2 Recap

Part 2 – Marketing Operations – Lesson 3

- Entered Leads
  - Via mobile app
  - By importing a purchased list
  - By sync'ing a file to an external FTP site
- Checked leads for duplicates. Merged duplicates. Status=Lost; Reason=Duplicate
- Purged leads with a status of Lost
- Filtered leads with no email/phone. Used Mass Update to set Status=Lost
- Used assignment map to assign owners to leads

Part 2 – Marketing Operations – Lesson 4

- Created an email, an event, a task, and a phone call (activity)

Part 2 – Marketing Operations – Lesson 5

- Created a Marketing List
- Created a Marketing Campaign
- Sent out Mass Email to campaign members

Lesson 6
Lead Qualification

Lesson 6 – Lead Qualification

Learning Objectives:

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

You will do the following:

- Create prospects and opportunities
- Suspend leads
- Convert leads to prospects, contacts, and opportunities

Lesson 6 – Lead Qualification

Terminology

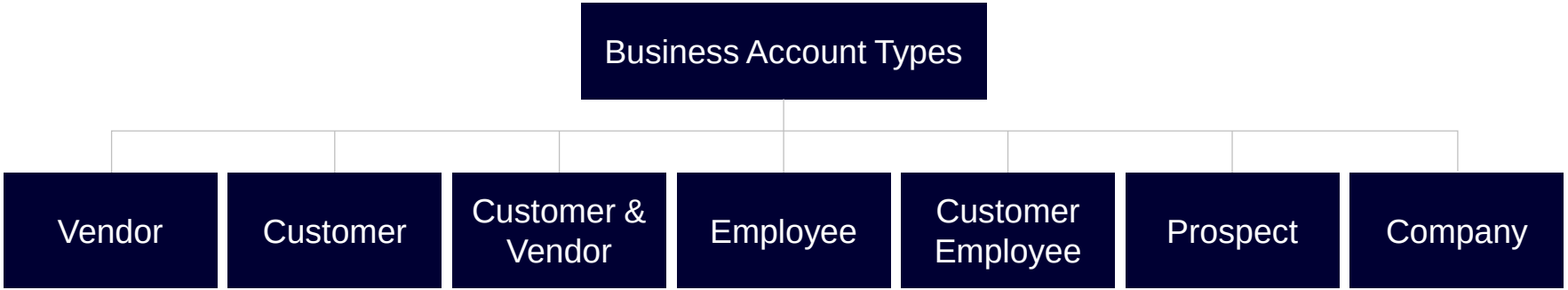
Owners: Employees assigned to a record and responsible for its processing.

Prospect: A qualified lead that has shown interest in the products or services; however has never done business with the company. Once a lead is qualified it can be converted to a Business Account (Type = Prospect).

Lesson 6 – Lead Qualification

Terminology

<u>Business Account</u>: are used to store information related to prospects, customers, vendors, employees. A Business Account can be both a customer and vendor. Business Accounts can be associated to multiple contacts.



Lesson 6 – Lead Qualification

Terminology

Opportunities: Represents a potential sale to a new or existing customer. A Lead that displays an intention to buy can be regarded as a qualified opportunity. An Opportunity can be created from a Lead in which information is automatically copied. At the same time, a contact record is also created and associated to the Opportunity.

Lesson 6 – Lead Qualification

Terminology

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.

Convert leads to contacts when they don’t have any immediate interest, but would like to be contacted for future offers.

Lesson 6 – Lead Qualification

Business Scenario:

My Company has adopted a qualification process that includes the following tasks:

1) Assign Leads to Owners (Telemarketers) Status = Open

2) Qualify Leads Status = Nurture, Won, Lost

3) Monitor Results

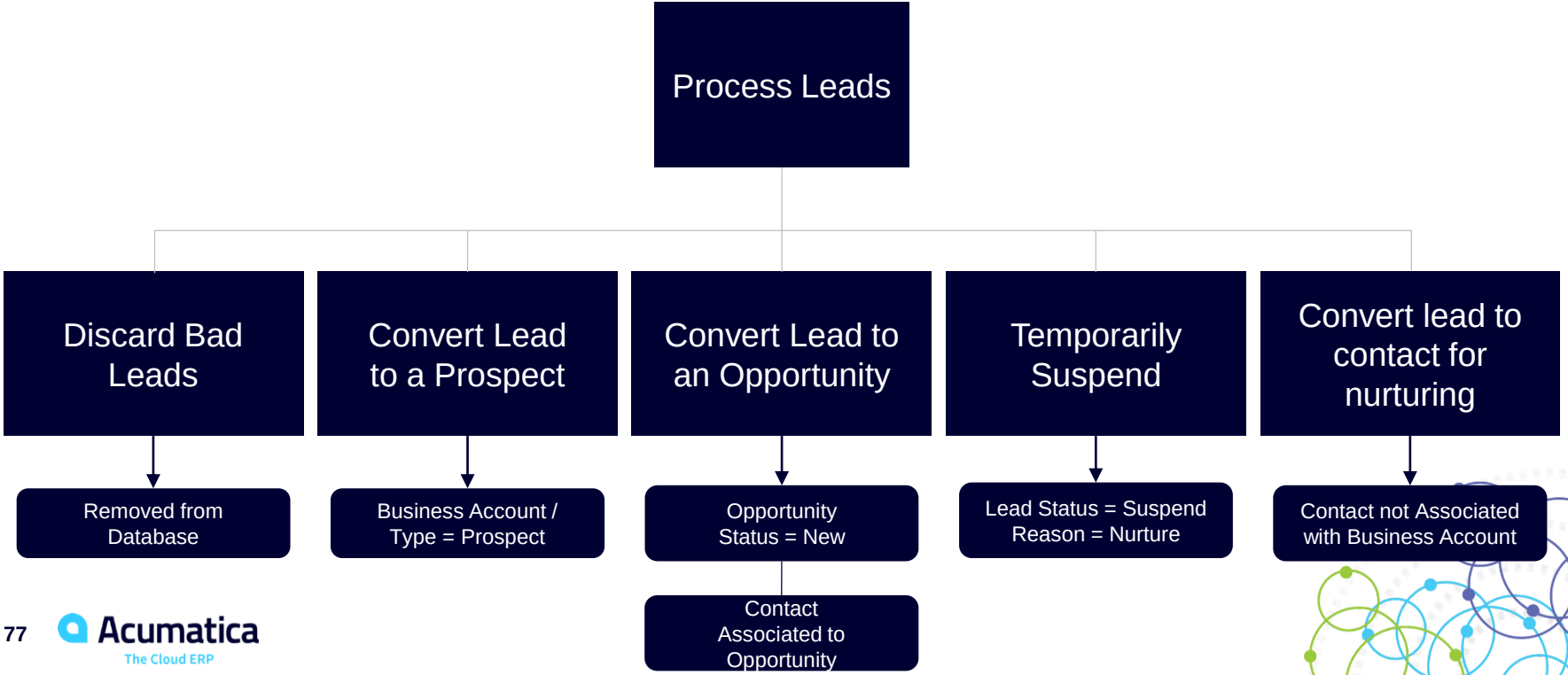
Lesson 6 – Lead Qualification

1) Assign Lead

Assign Leads in bulk using an Assignment map → Manually assign remaining leads → Setup notifications for owners

Lesson 6 – Lead Qualification

2) Qualify Leads



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Lesson 6 – Lead Qualification

3) Control Results

Monitor owner workload	Monitor owner progress	Reassign unattended leads

Lesson 6 – Lead Qualification

Complete Steps 6.1-6.4 (pages 83 – 99)

In this Lesson you will perform the following tasks:

1. **Step 6.1**: Convert a lead to a prospect.
2. **Step 6.2**: Convert a lead to an Opportunity. Then create a Business Account (Prospect) and convert the prospect to a Customer.
3. **Step 6.3**: Suspend a lead that seems to be a fit, but is not ready for conversation.
4. **Step 6.4**: Convert a lead to a contact; use attribute to specify “nurture”.

Lesson 7
Working with Opportunities

Lesson 7 – Working with Opportunities

Business Scenario Overview:

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.

Lesson 7 – Working with Opportunities

Learning Objectives:

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

- Create new opportunities
- 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

Lesson 7 – Working with Opportunities

Complete Step 7.1: Creating Opportunities (pg. 93)

In this step you will perform the following tasks:

1. Create an Opportunity on the Opportunities form
2. Create an Opportunity by using the Acumatica Add-In for Outlook

Lesson 7 – Working with Opportunities

Business Scenario 2:

You will add 40 hours of Financial Strategy services to the Opportunity. The customer wants to purchase at half-price while your marketing campaign is still running. Then you will close the deal and create an invoice.

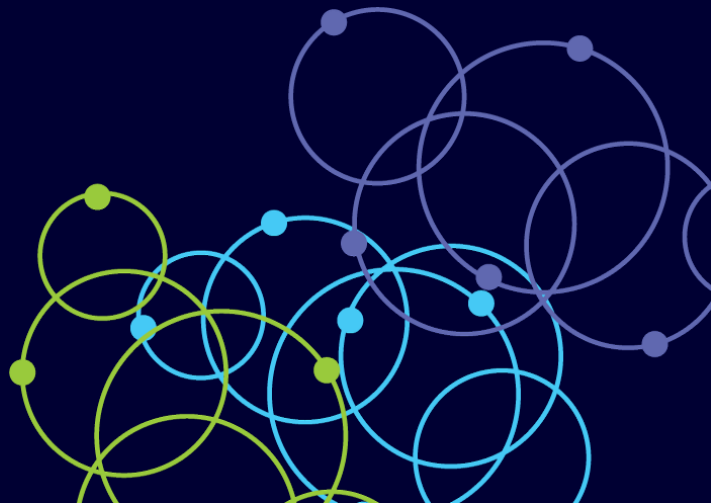
Lesson 7 – Working with Opportunities

Complete Steps 7.2 & 7.3: Advancing an Opportunity Through Stages and Creating Opportunity-Based Quotes & Invoices (pg. 94 - 97)

In this step you will perform the following tasks:

1. Add Products to an Opportunity
2. Convert the Prospect Business Account to a Customer
3. Win the Opportunity
4. Invoice the Customer

Lesson 8
Support Operations
(Case Management)



Lesson 8 – Support Cases

Business Scenario:

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

The customer support team will uses cases to track customer incidents in Acumatica.

Lesson 8 – Support Operations

Learning Objectives:

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

- Register support cases
- Assign cases to owners
- Process cases
- Release cases and create associated invoices

Lesson 8 – Support Cases

Cases:

- Cases (also known as tickets) are used to record customer requests, problems, complaints, and other inquiries received by email, phone, or any other medium.
- By using the case management features in Acumatica ERP, your service professionals can enter, assign, escalate, and resolve cases quickly and efficiently.
- Your employees can quickly access cases, route them to the person or workgroup that can best address the issue, and keep customers informed of the progress of their service request.

Lesson 8 – Support Cases

Case Processing:

1. Case is created by person responsible for case creation
2. Case is assigned (either manually or via assignment map) to a specific workgroup and person within the workgroup
3. (optional) Approval of case resolution
4. Escalation of the case if it is overdue. Escalation makes the case visible to workgroups higher in the company tree
5. Release of case activities, the case itself, or both
6. Billing of the case or contract. Standalone cases are billed once they are released, while contract cases are billed in bulk once it is time to issue an invoice for the contract
7. Closing of the case, which happens after it is billed

Lesson 8 – Support Cases

Case Statuses:

A case status reflects its location within the case processing cycle. If users consistently and appropriately use statuses, you can get meaningful statistics on cases when you generate performance reports and inquiries.

The default set of statuses is as follows:

New: The case is new. A case with this status can have only the *Assign value* in the **Reason** box.

Open: The case is open. A case with this status can have the following values in the **Reason** box:

In Process, Updated, or In Escalation.

Pending Customer: The case waits for feedback from customer. A case with this status can have the following values in the **Reason** box: *More Info Requested or Waiting Confirmation.*

Closed: The case is finally closed. A case with this status can have the following values in the **Reason** box: *Resolved, Abandoned, Cancelled, Rejected or Duplicate.*

Lesson 8 – Support Cases

Billing Cases:

Cases are billed in accordance with the specific contract or the default contract associated with the case class. Activities can be billable or not billable; this should be specified for the case class.

Billable activities include: phone calls, emails, and notes. Then customers can be billed for the time that employees spent on case processing, based on the released activities associated with the case.

Lesson 8 – Support Cases

Billing Settings (defined on Case Class):

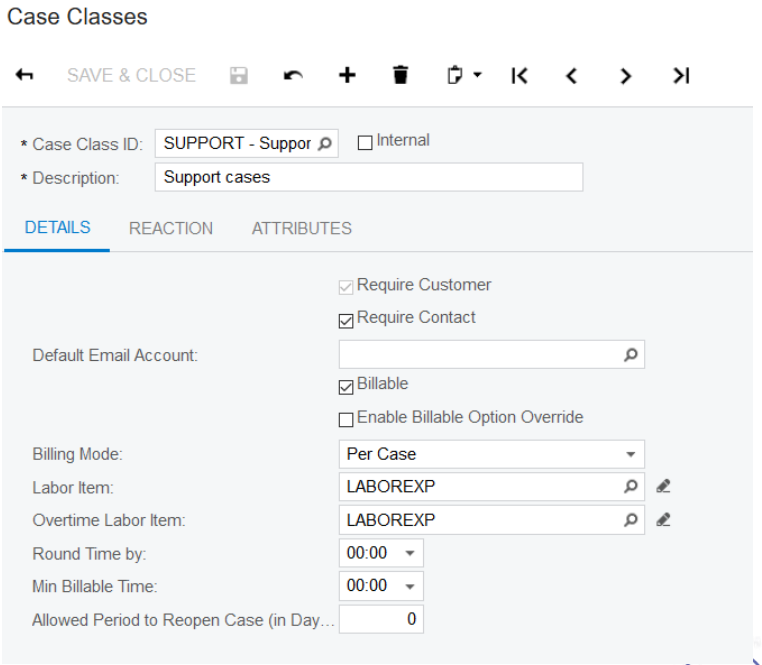
Case Class must be marked Billable.

Case Class supports two Billing Modes:

- Per Case
- Per Activity (associated with Contracts)

The **Billing Mode** field is only available only if ***Time Reporting on Activity*** feature is enabled. If not enabled, the per case billing mode is automatically selected.

You can specify non-stock labor items to be used for transactions.



Acumatica
The Cloud ERP

Lesson 8 – Support Cases

Billing Settings:

Round Time By:

Think of this setting as “Rounds up after” or “Rounds down before”.

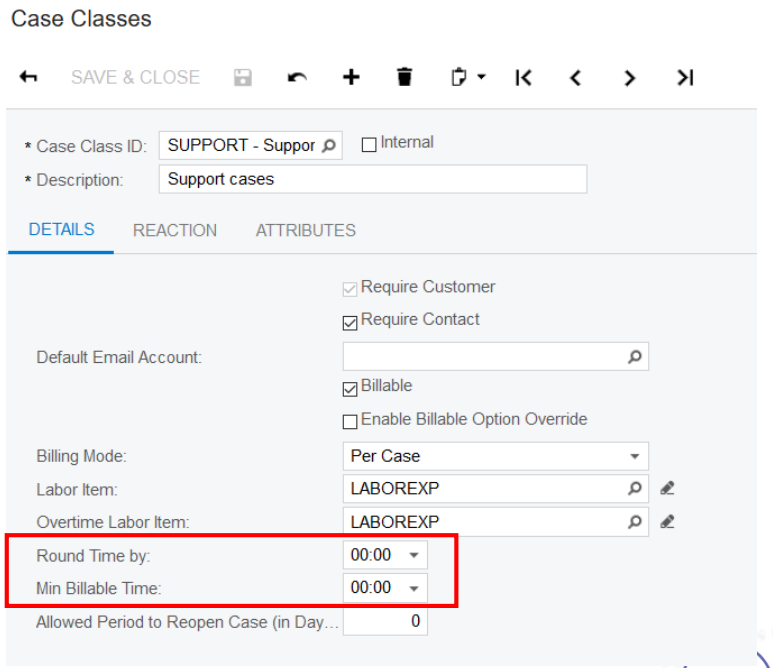
Min Billable Time:

Smallest fraction of an hour that you will bill. If set to15 minutes, but actual time spent is 5 minutes, customer is still billed for 15 minutes.

Example:

Round Time by = 15
Min Billable Time = 1 hour
Actual Time Spent = 1 hour and 5 minutes
Billable Time = 1 hour (rounds down)

Actual Time Spent = 1 hour and 20 minutes
Billable Time = 2 hours (rounds up)



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The Cloud ERP

Lesson 8 – Support Cases

P*er case* billing mode:

- You can bill only if the case is closed. If any activity related to the case has not been completed yet (and approved, if approval is required), you cannot release the case
- You can release such cases for billing either one at a time or in batches.
- The invoice includes the total number of billable hours that have been reported on Activities. You can manually override this number on the Case.

Lesson 8 – Support Cases

***Per activity* billing mode:**

- You can bill the customer for separate activities when the case is not yet closed.
- The case cannot be marked as billable, and it cannot be released for billing. Contracts module controls these cases.
- The case must always be associated with a contract so that related activities can be billed accordingly.
- Activities must be completed and approved (if necessary) before they applied to the contract rules.
- For each activity, its owner must enter time spent.

Lesson 8 – Support Cases

Step 8.1: Registering a Case (pg. 102)

In this step, you will manually create a new case.

Lesson 8 – Support Cases

Step 8.2: Assigning the Case to an Owner (pg. 104)

In this step, you will perform the following task:

1. Manually assign the new case to an owner.
2. Setup email notifications for owners.

Lesson 8 – Support Cases

Step 8.3: Processing the Case (pg. 105)

In this step, you will perform the following task:

1. Record a billable activity.
2. Resolve and close the case.
3. Setup email notifications for customers.

Lesson 8 – Support Cases

Step 8.4: Releasing the Case for Billing (pg. 108)

In this step, you will release the resolved case:

1. Release case one at a time.
2. Release cases as a batch.

Day 3 Recap

Part 3 – Sales Operations – Lesson 6

- Qualified Leads
  - Converted to Prospect
  - Converted to Opportunity
- Leads to Nurture
  - Converted to Prospect
  - Changed *Status* to Suspend; *Reason* to Nurture

Part 3 – Sales Operations – Lesson 7

- Created a new Opportunity (from browser app and Outlook Plugin)
- Added Products/Services on the Products tab; applied discount
- Won the deal; Created an invoice.

Part 4 – Support Operations – Lesson 8

- Created a billable Case
- Assigned an Owner to the Case
- Entered an Activity to record time worked on Case
- Released the case, created an invoice.

Lesson 9
CRM Reports

Reporting in Acumatica CRM

Built-in

- Generic Inquiries
  - List records
  - Navigate to records
- Dashboards
  - Based on Generic Inquiries
  - Real-time analytics
  - Real-time monitoring of operations
- Pivots
  - Based on Generic Inquiries
  - Real-time analytics

External

- Excel
- OData
  - Microsoft Power BI

Generic Inquiries

Leads

ALL RECORDS | NEW | OPEN | NURTURE | WON | LOST | UNASSIGNED

Display Name	Company Name	Job Title	Owner Name	Source	Status
Coudane, Benedicte	S.G. Daedalus	Network manager		Purchase…	Open
Darrow, Mag	Data Source Software Corp	Accountant		Other	Converted
Ehardt Thomas, Mr.	Advogent Group, Inc.	CEO		Purchase…	New
Elbow John, Mr.	Advogent Group, Inc.	CEO		Referral	New
Finch, Allen	Intelligent Technologies, Inc.	Director of Sales	Admin	Referral	New
Graff Leslie, Mr.	Airgas, Inc.	Credit Manager		Phone In…	Converted
Hester Chuck, Mr.	Internatioonal Trade Center	Director of Public Relations			New
Jackson, James	Hyperion Systems Engineeri…	IT Supervisor		Other	New
Johnson Eva, Mrs.	Marenco Insurance Sales C…	Accountant		Purchase…	New
Keatinge, Douglas	Digicel Group	Head of Investor Relations		Purchase…	New
Kelly, David	Russell brennan Keane	Auditor		Other	New
Kivisilta, Anni	eQ Bank	Human Resources Mana…		Purchase…	New
Klabunde, Shirl	AdvertisementCo	CEO	Admin	Purchase…	New
Kwazulu Natal, Mr.	Lexmark International SA (P…	Sales Manager			New
Lind Jeroen, Mr.	N.V. Nationale Borg-Maatsc…	Relationship Manager		Purchase…	New
LinkedIn	GoodCo		Admin	Web	New
Livier Joahn, Mrs.	Budget Direct Insurance	Head of Client Services…		Purchase…	New
Maricle, Thomas	UtilityCo	King	Admin	Web	New

Users can

- Choose columns visible and column width
- Define personal filters

Admins can

- Define what columns are available to users
- Pre-configure filters (tabs)

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Pivots

Lead Summary

Class | Source Campaign | Owner | Workgroup

Source	Status: Converted	Lost	New	Open	Suspended	Total
Undefined			4	1		5
Other	2	1	12			15
Phone Inquiry	1		1			2
Purchased List		1	16	1	1	19
Referral			3			3
Web	1		3			4
Total	4	2	39	2	1	48

Users can

- Filter and sort data
- Change columns and rows

Admins can

- Define what columns available to users
- Pre-configure filters

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Dashboards

- Can be shared across all users
- Can be created for a specific individual
- Can display information from external sources, ex: Power BI
- Real time information, all in one place.

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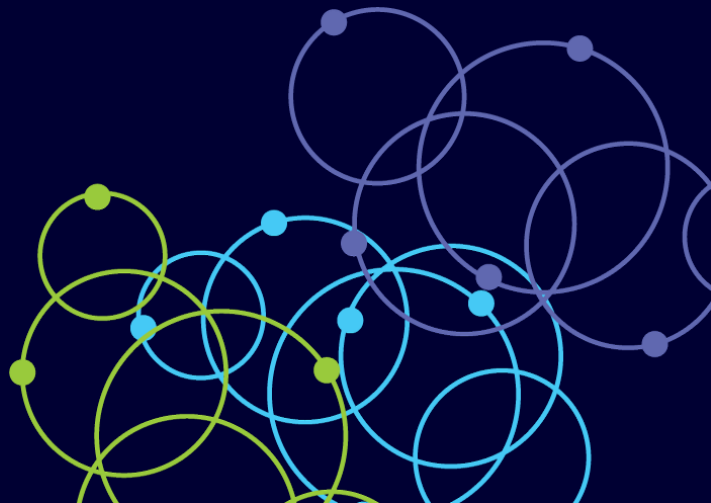
Lesson 9 – CRM Reports

Step 9.1 – 9.3: Review Reports for Marketing, Sales, and Support (pg. 115)

Lesson 10
Customer Portal



Lesson 10 – Customer Portal

Overview of the Customer Portal

Acumatica offers a Self-Service Portal that allows customers to:

FINANCE

- View and Print Statements
- View open and historical documents (Invoices and Credit Memos)
- Print historical documents
- Get AP aging report

ONLINE ORDERING

- Create & Maintain online catalog of products
- Customers place orders
- Track status of order & shipments

SUPPORT

- Enter new support cases
- View open and closed cases
- Upload files and add comments to cases
- Reopen cases as required.

MY ACCOUNT

- Maintain Company Profile
- Maintain Company Contacts
- Delegated Administrators

DOCUMENTATION

- Search Knowledge Base Articles
- Access to on-line Portal help

Lesson 10 – Customer Portal

Step 10.1: Create a Portal User (pg. 121)

In this step, you will create a user account for a portal user.

Step 10.2: Parent/Child Relationships (pg. 123)

In this step, you will define the parent/child relationship between two companies:

1. From the portal, the parent company can see customer detail from child company
2. Parent company can view and manage contacts of child company

Step 10.3: Create a Portal User (pg. 124)

In this step, you will set default values for faster data entry of cases.

CRM Review Q&A

We Want Your Feedback

Please provide your feedback of the training:

https://www.surveymonkey.com/r/onlinesessions2018

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Thank You

Nancy Carriere
Partner Enablement Manager

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