Organization

# C100 Customer Relationship Management (CRM)

Training Guide

Acumatica
The Cloud ERP

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Acumatica ERP 2021 R1

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# How to Use This Course

This course introduces you to the Acumatica ERP CRM functionality based on a set of examples that illustrate configuration, marketing, sales, and support processes in a small company. The course consists of the lessons that guide you step by step through the examples and explanations of the configuration and business process flow in Acumatica ERP.

This course must be completed on Acumatica ERP 2021 R1. For this course, you will use two Acumatica ERP tenants: one with an out-of-the-box company (a newly created company with no dataset preloaded), and another with the *U100* dataset preloaded; this dataset provides the predefined settings and entities you will need as you complete the activities of this course.

You perform the following general steps to complete the course:

1. You prepare an Acumatica ERP 2021 R1 instance with an out-of-the-box company or make sure that a system administrator has performed this task for you.
2. In the out-of-the-box company, you complete Lesson 1 of Part 1 to prepare the basic company configuration required for the implementation of CRM functionality in the test environment.
3. You prepare an Acumatica ERP 2021 R1 instance and restore the snapshot provided with the course.
4. In the company with the *U100* dataset, you complete Lessons 2—4 of Part 1 one by one to learn how to configure the basic CRM functionality.
5. At Partner University, you read the rules of the assessment test.
6. At Partner University, you take the C100 Certification Test 1: CRM Configuration.
7. In the company with the *U100* dataset, you complete the lessons of Part 2 one by one to learn how to perform the basic marketing processes in CRM.
8. At Partner University, you take the C100 Certification Test 2: CRM Marketing Operations.
9. In the company with the *U100* dataset, you complete the lessons of Part 3 one by one to learn how to perform the basic sales processes in CRM.
10. At Partner University, you take the following certification tests:
    - C100 Certification Test 3: CRM Sales Operations
    - C105 Certification Test 2020 R2
    - C105 Certification Test 2021 R1
11. In the company with the *U100* dataset, you complete the lessons of Part 4 one by one to learn how to perform the basic customer support processes in CRM.
12. At Partner University, you take the C100 Certification Test 4: CRM Support Operations.
13. At Partner University, you complete the C100 course survey to finish the course and get the Partner University certificate of course completion.

## What Is in Parts

The course is divided into four major parts:

- Part 1 includes the following activities:
  - Activities to be performed in the out-of-the-box company to prepare for setting up the basic CRM configuration
  - Activities to be performed in the company with the *U100* dataset preloaded to configure the basic CRM functionality

  You have to read the concepts and perform the implementation activities of this part to learn how to configure a company with the basic CRM functionality.
- Part 2 consists of process lessons and is dedicated to particular business processes of the CRM marketing functionality. You have to read the concepts and complete the process activities of this part in a company with the *U100* dataset to learn how to perform basic marketing operations in a fully configured system.
- Part 3 consists of process lessons and is dedicated to particular business processes of the CRM sales functionality. You have to read the concepts and complete the process activities of this part in a company with the *U100* dataset to learn how to perform basic sales operations in a fully configured system.
- Part 4 consists of process lessons and is dedicated to particular business processes of the CRM customer support functionality. You have to read the concepts and complete the process activities of this part in a company with the *U100* dataset to learn how to perform basic customer support operations in a fully configured system.

## What Is in a Configuration Lesson

A *configuration lesson*—that is, a lesson dedicated to the configuration of system settings and entities—provides a brief overview of the required system configuration and a description of other settings that could affect the configuration workflow.

Each configuration lesson includes at least one implementation activity that you have to complete in your Acumatica ERP instance to configure the core system settings or to prepare system entities.

## What Is in a Process Lesson

A *process lesson*—that is, a lesson dedicated to the performing of a particular business process—includes a brief user scenario, a description of the process workflow and can include process diagrams that illustrate the user scenario supported by this process. The lesson also provides a brief overview of the settings that need to be specified and the entities that need to be prepared in the system before you start to perform this business process.

Each process lesson includes at least one process activity that you have to complete in your Acumatica ERP instance to learn how to perform the described business process.

## What Are the Documentation Resources

The complete Acumatica ERP documentation is available on *https://help.acumatica.com/* and is included in the Acumatica ERP instance. While viewing any form used in the course, you can click the **Open Help** button in the top pane to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related concepts and procedures and to open a reference topic with detailed descriptions of the form elements.

### How to Create a Tenant with an Out-of-the-Box Company

To add to an existing Acumatica ERP instance a tenant with an out-of-the-box company, perform the following instructions:

1. Launch the Acumatica ERP instance and sign in.
2. Open the *Tenants* (SM203520) form, and click **Add New Record** on the form toolbar.
3. In the **Login Name** box, type a name to be used for the tenant.
4. On the form toolbar, click **Save**.

   The system creates the tenant.
5. Sign out of the current tenant.

   You are now on the Welcome page and you can sign in to the tenant you have just created.

### How to Create a Tenant with the *U100* Dataset

To add to an existing Acumatica ERP instance a tenant with the *U100* dataset, which is required for the completion of this course, and prepare the tenant for completing the activities, perform the following instructions:

1. Go to *Amazon Storage*.
2. Open the folder of your Acumatica ERP instance version.
3. In this folder, open the `Snapshots` folder, and download the `u100.zip` file.
4. Launch the Acumatica ERP instance, and sign in.
5. Open the *Tenants* (SM203520) form, and click **Add New Record** on the form toolbar.
6. In the **Login Name** box, type the name to be used for the tenant.
7. On the form toolbar, click **Save**.
8. On the **Snapshots** tab, click **Import Snapshot**.
9. In the **Upload Snapshot Package** dialog box, select the `u100.zip` file, which you have downloaded, and click **Upload**.

   The system uploads the snapshot to the **Snapshots** tab of the *Tenants* form.
10. On the form toolbar, click **Restore Snapshot**.
11. If the **Warning** dialog box appears, click **Yes**.
12. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded, and click **OK**. The system will restore the snapshot and sign you out.

    You are now on the Sign-In page, and you can sign in to the tenant you have just created.

## Licensing Information

For the educational purposes of this course, you use Acumatica ERP under the trial license, which does not require activation and provides all available features. For production use of this functionality, you have to activate the license your organization has purchased. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP sales policy for details.

# Company Story

This topic explains the organizational structure and operational activity of the company with which you will work during this training.

## Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- SweetLife Head Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- SweetLife Store: This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch assembles juicers, sells juicers, installs juicers, trains customers' employees to operate juicers, and provides juicer servicing.

The ToadGreen Building Group is a subsidiary of the SweetLife Fruits & Jams company. ToadGreen Building Group —which is located in New York—is a general contractor coordinating construction projects for governmental and commercial customers. The company has only one branch, ToadGreen Building Group, in which the corresponding projects are being managed and all construction-related tasks are recorded.

The Muffins & Cakes company is a subsidiary SweetLife Fruits & Jams company. Muffins & Cakes—which is located in Denver, Colorado—consists of the following branches:

- Muffins Head Office and Wholesale Center: This branch owns a bakery and a wholesale warehouse where products are stored.
- Muffins Retail Shop: This branch, which sells products to retail customers, has a retail shop with a small warehouse.

## Operational Activity

The company has been operating starting in the *01-2020* financial period. In November 2020, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. Because the company has grown, the equipment center has begun its operations in *01-2021*.

In October *2020*, the company received an investment and opened a subsidiary company for construction (ToadGreen). In February *2021*, the company started its first construction project.

The Muffins & Cakes company was established in January 2020 and started using Acumatica ERP at the end of the *01-2021* financial period.

The base currency of the company and its subsidiaries is U.S. Dollars (USD). All amounts in documents and reports are expressed in U.S. dollars unless otherwise indicated.

## Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors. The company also purchases juicers and juicer parts for sale from a large juicer vendor and either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

The Muffins & Cakes company also purchases stationery (printing paper, pens, and pencils) and advertising services.

## Company Sales and Services

Each company's branch has its own business processes, as follows:

- SweetLife Head Office and Wholesale Center: In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafés. The company also conducts home canning training at the customer's location and webinars on the company's website.
- SweetLife Store: In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- Service and Equipment Sales Center: This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs one-time endeavors as well as complex projects with their own budgets.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

The Muffins & Cakes branches have the following business processes:

- Muffins Head Office & Wholesale Center: In this branch, baked goods and products for baking are sold to wholesale customers, such as restaurants and cafés. The company also conducts baking classes at customer locations.
- Muffins Store: In the store, small retail customers purchase baked goods, or pick the goods ordered on the website.

# Part 1: Configuring CRM Functionality

In Part 1 of this training course, you will learn how to prepare the system for customer relationship management.

For completing activities of Lesson 1 in this part, you will use an out-of-the-box company. You will perform basic company configuration that makes possible to prepare the system for implementing CRM in the test environment. For simplicity, you will not complete the full list of tasks required to prepare an instance for the implementation. You can find the full workflow of CRM implementation in the production environment in *Configuring CRM Functionality: General Information*.

For completing activities of Lessons 2—4 in this part, you will use a company with the *U100* dataset preloaded, which provides a fully configured company with sample data specially designed for this course.

The lessons of this part are independent: You can complete implementation activities in any order.

You will complete implementation activities under an administrator user account.

# Lesson 1: Performing Basic Configuration of CRM Functionality

## Lesson 1.1: Configuring a Company Without Branches

### Company Without Branches: General Information

When you initially implement Acumatica ERP, you perform the company configuration that makes it possible for system implementation to proceed. This configuration includes enabling the default set of features and configuring the company in the system. You can proceed to further Acumatica ERP implementation, which includes specifying the basic settings related to the general ledger and to cash management, accounts payable, and accounts receivable.

When you configure a company in Acumatica ERP, it can be defined as being without branches, as consisting of branches that require balancing entries (if transactions involve multiple branches), or as having branches that do not require balancing entries. The topics of this chapter describe the configuration of a company without branches.

#### Learning Objectives

In this chapter, 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

#### Applicable Scenarios

You configure a company without branches if the company has only one business location. You perform this company configuration as a first phase of the implementation of Acumatica ERP, before the entities needed for business processes are created. You can also add a new company without branches to the existing companies in an existing tenant at any time.

## Workflow of the Configuration of a Company Without Branches

To implement the basic configuration of a company without branches in Acumatica ERP, you perform the following general steps:

1. On the *Enable/Disable Features* (CS100000) form, you enable the default set of features. For details, see *Company Without Branches: To Configure a Company Without Branches*.

   > In a production environment, after the features are enabled, you have to activate the Acumatica ERP license by using the *Activate License* (SM201510) form. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP sales policy for details.

2. On the *Companies* (CS101500) form, you create the company entity in the system; you also create its actual ledger. For details, see *Company Without Branches: To Configure a Company Without Branches* and *General Ledger: To Create an Actual Ledger*.
3. On the *Chart of Accounts* (GL202500) form, you add the accounts that are necessary for performing the financial operations of the company, as described in *General Ledger: To Create a Chart of Accounts*.
4. On the *General Ledger Preferences* (GL102000) form, you specify the settings for processing transactions in the general ledger. For details, see *General Ledger: To Specify General Ledger Preferences*.
5. On the *Financial Year* (GL101000) form, you set up the first financial year when the company starts processing its operations in Acumatica ERP. You then generate periods on the *Master Financial Calendar* (GL201000) form and open them on the *Manage Financial Periods* (GL503000) form. For more information, see *General Ledger: To Define a Financial Year*.
6. On the *Cash Management Preferences* (CA102000) form, you specify the settings to be used in the system for processing cash transactions. For details, see *Cash Management: To Specify Cash Management Preferences*.
7. On the *Entry Types* (CA203000) form, you add the necessary entry types for processing cash payments. For details, see *Cash Management: To Create an Entry Type*.
8. On the *Cash Accounts* (CA202000) form, you define the cash accounts to be used to record cash entries and funds transfers. For more information, see *Cash Management: To Create Cash Accounts*.
9. On the *Payment Methods* (CA204000) form, you define the payment methods that the company uses to pay its vendors, as well as the payment methods that are used by customers to pay the company. For more information, see *Cash Management: To Modify a Payment Method*.
10. On the *Credit Terms* (CS206500) form, you create the sets of credit terms that are commonly used by vendors in their relations with the company and by the company in its relations with customers. These will be assigned to particular vendors and customers and specified in their bills and invoices, respectively. For more information, see *Credit Terms: To Define Credit Terms*.
11. On the *Vendor Classes* (AP201000) form, you create the default vendor class, which will provide default values for vendor accounts of the class and for other vendor classes you create later. For details, see *Accounts Payable: To Create a Vendor Class*.

12. On the *Accounts Payable Preferences* (AP101000) form, you specify the settings to be used in accounts payable. See *Accounts Payable: To Specify Accounts Payable Preferences* for more information.

13. On the *Statement Cycles* (AR202800) form, you define the necessary statement cycles to track customers' outstanding balances, as described in *Accounts Receivable: To Create a Statement Cycle*. These cycles will be used later, when you are sending electronic or printed statements to the customers.

14. On the *Customer Classes* (AR201000) form, you create the default customer class, which will provide default values for customer accounts and for other customer classes you create later. For details, see *Accounts Receivable: To Create a Customer Class*.

15. On the *Accounts Receivable Preferences* (AR101000) form, you specify the settings to be used in accounts receivable. See *Accounts Receivable: To Specify Accounts Receivable Preferences* for more information.

### Company Settings

In Acumatica ERP, you can create new companies or maintain existing companies by using the *Companies* (CS101500) form. A company may have no branches, or it may consist of multiple branches, with each being a separate office or point of sale.

To configure the company without branches, you have to specify the company's identifier, name, address, units of measure, and ensure that the *Without Branches* type is selected on the *Companies* form. You have to specify the company's identifier, name, address, and units of measure. You also specify the base currency of the company, which you cannot change after you save the newly created company for the first time and save the GL preferences on the *General Ledger Preferences* (GL102000) form. If you create multiple companies in the tenant, this base currency will be used automatically for all companies and cannot be changed.

After the company has been configured, the *Without Branches* company type can still be changed to *With Branches Not Requiring Balancing* and *With Branches Requiring Balancing* at any time if the *Multi-Branch Support* feature is selected on the *Enable/Disable Features* (CS100000) form.

## Company Without Branches: To Configure a Company Without Branches

In this activity, you will learn how to enable the minimum set of features and define settings for a company without branches.

### 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.

### System Preparation

Before you start configuring a company without branches, sign in to a tenant with the out-of-the-box company as a system administrator with the *admin* username.

### Step 1: Enabling the Minimum Set of Features

To enable the minimum set of features, do the following:

1. Open the *Enable/Disable Features* (CS100000) form.
2. On the form toolbar, click **Enable** to enable the default set of features, which are those for which the corresponding check boxes have been selected on the form. This set of features consists of *Finance*, *Standard Financials*, *Centralized Period Management*, *Platform*, *Monitoring & Automation*, *Scheduled Processing*, *Workflow Automation*, *Authentication*, and *Third Party Integrations*.

In a production environment, after the features are enabled and before you proceed with implementation, you have to activate the Acumatica ERP license by using the *Activate License* (SM201510) form. In this activity, you are using Acumatica ERP under the trial license, which doesn't require activation and provides all available features.

### Step 2: Defining a Company Without Branches

To configure the company without branches for SweetLife, do the following:

1. Open the *Companies* (CS101500) form.

   > To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click New right of the title.

2. In the Summary area, specify the following settings:
   - **Company ID**: `SWEETLIFE`
   - **Company Name**: `SweetLife Fruits & Jams`

   In the **Company Type** box, notice that *Without Branches* is selected; you will leave this default setting.
3. In the **Main Address** section of the **Company Details** tab, specify the following address settings:
   - **City**: `New York`
   - **Country**: *US - United States of America*
   - **State**: *NY - New York*
4. In the **Base Currency Settings (Shared)** section, specify *USD - US Dollars* in the **Base Currency ID** box.

   > The base currency you select for the first company in the tenant will be applied to all companies in the tenant. After you specify the base currency and save your changes, the base currency can be overridden until GL preferences are saved on the *General Ledger Preferences* (GL102000) form. After the GL preferences have been saved, the base currency cannot be overridden.

5. In the **Miscellaneous Settings (Shared)** section, enter `2` in the **Price/Cost Decimal Places** box.

   > If you later add additional companies to the tenant, the settings you specify in this area for the first company in the tenant will be applied to all companies in the tenant.

6. On the form toolbar, click **Save** to save your changes.

On the same form, you can now create an actual ledger for the company you have created. For details, see *General Ledger: To Create an Actual Ledger*.

### Step 3: Reviewing the Base Currency Settings

To review the settings of the company's base currency, which you specified in Step 2, do the following:

1. Open the *Currencies* (CM202000) form.
2. In the **Currency ID** box, select *USD*.
3. In the Summary area, review the values in the **Description**, **Currency Symbol**, and **Decimal Precision** boxes for the base currency you selected for the company in Step 2.

   Notice that the **Active** check box is selected automatically and is unavailable for editing, indicating this is the base currency.

### Activity Recap

In this activity, we have illustrated the following:

1. The system administrator has enabled the minimum set of features.
2. The system administrator has created a company without branches and entered its main address, the base currency, and the decimal precision to be used for prices and costs.
3. The system administrator has reviewed the settings of the base currency that was selected for the new company.

# Lesson 1.2: Configuring Basic CRM Functionality

## Configuring CRM Functionality: General Information

You can perform the initial configuration of customer relationship management (CRM) functionality in Acumatica ERP when a basic company has been configured in the system. This initial configuration includes enabling the required features and specifying the required settings to be used in the system for the CRM functionality. In a production environment, before you configure CRM, you perform broader Acumatica ERP implementation, which includes enabling features and specifying the basic settings for the general ledger, cash management, accounts payable, and accounts receivable functionality.

This topic provides an overview of the tasks required for the initial Acumatica ERP implementation in a production environment and shows the initial configuration of CRM functionality.

### Learning Objectives

In this chapter, 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

## Applicable Scenarios

You may need to learn how to configure CRM functionality in scenarios that include the following:

- You are an implementation consultant who has performed other Acumatica ERP implementations and needs to configure the system so that users can start using the CRM functionality.
- You are an implementation consultant who is new to Acumatica ERP and needs to learn how to configure CRM functionality.

## Customer Relationship Management in Acumatica ERP

Customer relationship management functionality helps companies manage their interactions with current and potential customers to effectively identify and address customers' needs and build strong mutual relationships.

Acumatica ERP provides tools for process automation, data management, and reporting for marketing, sales, and customer support teams. You can easily customize the CRM functionality to fit your company’s business goals, ensure higher profitability, and streamline your marketing, sales, and customer support processes.

With the CRM functionality, your marketing personnel can easily create leads, validate leads for duplicates, assign leads to owners, qualify leads, and manage leads, marketing lists, and marketing campaigns.

By using the CRM functionality, your sales personnel can easily qualify leads, assign leads to owners, validate contacts and business accounts for duplicates, create business accounts and contacts, and manage leads, marketing lists, marketing campaigns, and opportunities.

Finally, the CRM functionality gives your customer support personnel the ability to create support cases, assign cases to owners, and process cases.

## Workflow of the CRM Implementation

After you install a new instance of Acumatica ERP, the system needs to be prepared for further implementation. When you sign in to a new Acumatica ERP instance, the only form you can access is the *Enable/Disable Features* (CS100000) form, which you use to enable the needed features, in accordance with your company’s license.

To prepare the system for CRM implementation, you perform the following general steps:

1. You configure basic company settings. For details, see *Preparing an Instance for Implementation*.
2. You implement at least the minimum general ledger, cash management, accounts payable, and accounts receivable functionality. These functional areas of Acumatica ERP do not require any change to their configuration when CRM is implemented; however, the functionality to be integrated with CRM should be implemented before CRM. For details, see *Configuring a Company Without Branches*.

3. You configure the system email accounts to be used for CRM in your company. For details, see *Configuring Email*.

4. On the *Enable/Disable Features* (CS100000) form, you enable the *Customer Management* feature and the needed features in this group of features. For details, see *Features for Setting Up CRM Functionality*.

5. On the *Customer Management Preferences* (CR101000) form, you review (or review and modify, as needed) the numbering sequences and save these settings in the system. For details, see *Selection of Numbering Sequences*.

## Features for Setting Up CRM Functionality

As mentioned in the previous section, at minimum, you need to enable the *Customer Management* feature on the *Enable/Disable Features* (CS100000) form in order to use basic CRM functionality. Enabling this feature gives you the ability to also enable the following additional features:

- *Lead/Contact Duplicate Validation*, which provides the duplicate validation functionality that you can use to set up the validation of lead and contact records for duplicates.
- *Case Management*, which gives users the ability to create, assign, and resolve cases.
- *Sales Quotes*, which gives users the ability to create opportunity-based sales quotes, send them to customers for review, and create sales orders and invoices based on these quotes.
- *Address Lookup Integration*, which gives users the ability to use the address enrichment functionality. With this feature enabled, integration with a web map service can be set up and users can add new addresses, update existing addresses, and fill in missing address information on the forms that have address information.

> In the production environment, after the features are enabled, you have to activate the Acumatica ERP license by using the *Activate License* (SM201510) form. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP sales policy for details.

You can also use the following features, which enhance the CRM functionality:

- The *Monitoring & Automation* group of features, which provides such capabilities as using approval maps, tracking user activities in the system, restricting access to particular system records for groups of users, and configuring automatic processing of documents.
- The *Customer Portal* group of features, which gives users the ability to use the Acumatica Self-Service Portal.
- *Case Management on Portal* in the *Customer Portal* group of features, which your organization can use to give your customers the ability to add cases and track case processing through the Self-Service Portal.

  > This feature can be enabled only if the *Case Management* feature is enabled.

For more information, see *Preparing an Instance: Acumatica ERP Features*.

### Selection of Numbering Sequences

Acumatica ERP uses numbering sequences to automatically generate identifiers (IDs) for new records of a certain type when they are created either manually by users or automatically by the system. Numbering sequences are used to generate IDs for records used in CRM, such as opportunities, sales quotes, and cases. You can use predefined numbering sequences or create new ones if needed. For more information, see *Use of Numbering Sequences*.

On the **General Settings** tab of the *Customer Management Preferences* (CR101000) form (**Numbering Sequences** section), you can review or modify the specified numbering sequences, which are used to generate identifiers for the following types of records:

- Opportunities
- Cases
- Mass emails
- Marketing campaigns
- Sales quotes

To review the settings of any of the specified numbering sequences, you can click the Edit button right of the applicable box; the system opens the *Numbering Sequences* (CS201010) form, where you can make any needed changes to the numbering sequence and save your changes.

On the *Segmented Keys* (CS202000) form, you can review or modify the numbering sequence used for business accounts, if applicable. The identifiers assigned to business accounts are determined by the *BIZACCT* segmented key, which is defined on the *Segmented Keys* form and is used for configuring the general structure of identifiers for business accounts, including the identifier length, the number of segments, and the type of segments. If an auto-numbered segment is used, a numbering sequence can be specified for it.

When you have finished reviewing the numbering sequences, you must save these settings on the *Customer Management Preferences* form by clicking **Save** on the form toolbar, even if you have made no changes on the form. After you have saved these settings, you can start using the CRM functionality in Acumatica ERP.

## Configuring CRM Functionality: Implementation Activity

In the following implementation activity, you will learn how to perform initial configuration of the customer relationship management (CRM) functionality in Acumatica ERP.

### 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.

### System Preparation

Before you start performing initial configuration of the CRM functionality, you should do the following:

1. Launch the Acumatica ERP website, and sign in to the system as a system administrator by using the following credentials:

- Username: *admin*
- Password: *123*

2. On the *Enable/Disable Features* (CS100000) form, enable the *Customer Management* feature.

### Step: Saving the Settings Required for CRM Functionality

Among the customer relationship management preferences that can be tailored to the needs of your company, you can specify the numbering sequences the system uses when assigning identifiers to records related to CRM.

To save the numbering sequence settings, which is a required step before you begin using CRM functionality, do the following:

1. Open the *Customer Management Preferences* (CR101000) form.
2. On the **General Settings** tab (**Numbering Sequences** section), make sure all the boxes contain the identifiers of the respective predefined numbering sequences. (Although you will not change these numbering sequences in this activity, different numbering sequences can be selected on this form, and any of the predefined numbering sequences can be edited to fit your organization's numbering preferences.)
3. On the form toolbar, click **Save**.

# Lesson 2: Defining Classes in CRM

In Acumatica ERP, you can group leads, contacts, business accounts, marketing campaigns, opportunities, and cases into classes based on specific characteristics. An accurate classification may help you quickly and effectively manage your marketing and sales processes, from lead acquisition to conversion of leads to opportunities, creation of customers, and preparation of financial reports.

## Lesson 2.1: Defining Lead Classes

### Lead Classes: General Information

In Acumatica ERP, you can group leads into classes based on specific characteristics. Accurately grouping leads into classes may help you quickly and effectively manage your marketing and sales processes, including lead acquisition, conversion of leads to opportunities, creation of customers, and preparation of financial reports.

This topic provides information about lead classes.

### Learning Objectives

In this chapter, 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

## Applicable Scenarios

You may want to learn how to create a lead class in scenarios that include the following:

- 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.

## Lead Classes

In Acumatica ERP, you can group leads into classes and gather different sets of additional information about the leads in each class. You can define classes on the *Lead Classes* (CR207000) form based on your company's business needs and get a comprehensive view of your business, from leads to revenue. Lead classes help you quickly distribute leads between owners, enter the settings of contacts, business accounts, and opportunities you create based on the lead, and define a default email account for sending emails to leads.

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. When a user creates a lead, the user can first select the applicable lead class, which causes the system to use the values of the class as default values for the lead. The system also loads any attributes—UI elements that you can configure, specifying their names, control types (check box, text box, or combo box), and possible values (for boxes with predefined options)—that you have defined for the class, so that the user can enter these values for the lead.

Lead classes also make the creation of leads faster and more accurate. When a user is creating a lead on the *Leads* (CR301000) form and selects a lead class on the **CRM Info** tab, the system fills in the values specified for the class; these default values can be overridden.

For each lead class, you can define a set of attributes that allow users to specify additional information about leads within the class. An attribute is a characteristic or quality—such as industry, number of employees, or company revenue—that is important to your company but is not already tracked on the *Leads* form. When a user selects a lead class for a new lead, the attributes of this class appear on the **Attributes** tab of the *Leads* form as additional elements for which the user selects the appropriate values. For more information about the use of attributes in Acumatica ERP, see *Attributes*.

On the *Leads* form, for a lead class, a system administrator can also define a set of user-defined fields, which hold the values of attributes. As soon as the user-defined fields have been added to the form, the system displays the **Document** and **User-Defined Fields** tabs in the Summary area. The user-defined fields are displayed as UI elements on the **User-Defined Fields** tab. They can be required or optional, depending on the settings defined by the system administrator. For more information about user-defined fields, see *User-Defined Fields*.

On the **General Settings** tab of the *Customer Management Preferences* (CR101000) form (**Data Entry Settings** section), you can specify the default lead class that the system will insert for each lead that you create in the system. Specifying this default class may be useful if a particular lead class is used far more than the others. If you select a default lead class, when a user creates a lead by using the *Leads* form, the system inserts this class into the **Lead Class** box of the **CRM Info** tab, and inserts the default settings associated with the lead class. If the user changes the default lead class, the system inserts the default settings specified for the newly selected class.

On the *Lead Classes* form, you can specify the following settings for each lead class:

- The identifier and description of the lead class
- The way the system determines the default owner of a lead of the lead class, which can be the user who creates the lead, a user determined through an assignment map, or an owner inherited from the source entity if the lead is created from another entity
- The map to be used for the automatic assignment of a lead of the class during lead creation if the default owner is determined through an assignment map
- The identifiers of the contact class, business account class, and opportunity class that the system specifies by default for a new contact, business account, or opportunity created based on a lead of the class (Thus, the default class settings will be inserted for the new contacts, business accounts, and opportunities, so you can create them more quickly.)
- The setting that makes required creation of a business account during the lead conversion
- The opportunity stage to be set as the default one for a new opportunity that is created based on a lead of the class
- The default email account that can be used for sending emails to the leads of the class
- The attributes specific to the lead class, as well as whether they are required or optional

### Example of Lead Classes and Attributes

Consider the following example of the use of lead classes and attributes.

> Attributes and classes are used similarly for leads, contacts, business accounts, marketing campaigns, opportunities, and cases.

Suppose that you sell two products, one for resale by retailers and the other for direct corporate use. You handle many leads and would like to divide them into groups based on whether they are related to a retail store or to a corporation. You can create two classes for these leads:

- The *Retail* class, for leads associated with retail stores of various sizes: This class might contain an attribute called **Size** with the values *Small*, *Midsize*, and *Big* corresponding to the store size, as well as other attributes to give you additional information about these stores.
- The *Corporate* class, for leads associated with organizations that are final consumers: Because some organizations may be tax-exempt, you might define an attribute called **Tax Status** with two possible values, *Tax-Exempt*, and *Taxable*. Another attribute, **Company Type**, might have such values as *Corporation*, *Hospital*, *University*, and *School*.

With these classes and their attributes configured in the system, when a user creates a new lead on the *Leads* (CR301000) form and selects a lead class on the **CRM Info** tab, the attributes of the class appear on the **Attributes** tab. The user can enter the needed attribute values for this lead.

## Lead Classes: Implementation Activity

The following implementation activity will show you how to create a lead class.

If you have not configured a company with basic settings and you want to practice creating a CRM class, you can perform this activity by using the *U100* dataset. In *U100*, you can also view examples of CRM classes that have been already created and contain all additional settings.

## 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.

## System Preparation

Before you start creating a lead class, you should launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as a system administrator by using the following credentials:

- Username: *gibbs*
- Password: *123*

## Step 1: Creating a Lead Class

To create the *MALL* lead class, do the following:

1. Open the *Lead Classes* (CR207000) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area, do the following:
   a. In the **Class ID** box, enter the new class identifier: `MALL`.
   b. In the **Description** box, type the following brief description of the class: `Large shopping centers`.
   c. To hide all records of the class from the Self-Service Portal users, make sure that the **Internal** check box is selected.
4. On the **Details** tab, in the **Conversion Settings** section, make sure that the *Require Account for Conversion to Opportunity* check box is selected. With this check box selected, a user can convert a lead of the class to an opportunity if a business account has been created for the lead or the user specifies the settings of a new account during the lead conversion.
5. On the form toolbar, click **Save**.

You have created the new lead class.

## Step 2: Specifying the Default Lead Class

To select the *MALL* lead class as the default class for newly created leads, do the following:

1. Open the *Customer Management Preferences* (CR101000) form.

2. On the **General Settings** tab (**Data Entry Settings** section), in the **Default Lead Class** box, select the *MALL* lead class that you have created in the previous step of this activity.

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

You have specified the default lead class. For each newly created lead, on the **CRM Info** tab of the *Leads* (CR301000) form, the system will insert *MALL* into the **Lead Class** box.

# Lesson 2.2: Defining Contact Classes

## Contact Classes: General Information

In Acumatica ERP, you can group contacts into classes based on specific characteristics. Accurately grouping contacts into classes may help you quickly and effectively manage your marketing and sales processes, including lead acquisition, contact creation, conversion of leads to opportunities, creation of customers, and preparation of financial reports.

This topic provides information about contact classes.

### Learning Objectives

In this chapter, 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

### Applicable Scenarios

You may want to learn how 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.

### Contact Classes

In Acumatica ERP, you can easily group contacts into classes and gather different sets of additional information about the contacts in each contact class. You can define classes on the *Contact Classes* (CR205000) form based on your company's business needs and get a comprehensive view of your business from leads to revenue. Contact classes help you quickly assign contacts to owners, enter the settings of leads, business accounts, and opportunities you create based on the contact, and define a default email account for sending emails to contacts.

A contact class is a grouping entity for leads that share at least one common characteristic. Contact classes are used for reporting purposes and for providing default values during data entry of individual contacts. When a user creates a contact, the user can first select the applicable contact class, which causes the system to use the values of the class as default values for the contact. The system also loads any attributes—UI elements that you can configure, specifying their names, control types (check box, text box, or combo box), and possible values (for boxes with predefined options)—that you have defined for the class, so that the user can enter these values for the contact.

Contact classes also make the creation of contacts faster and more accurate. When a user is creating a contact on the *Contacts* (CR302000) form and selects a contact class on the **CRM Info** tab, the system fills in the values specified for the class; these default values can be overridden.

For each contact class, you can define a set of attributes that allow users to specify additional information about contacts within the class. An attribute is a characteristic or quality—such as industry, number of employees, or company revenue—that his important to your company but is not already tracked on the *Contacts* form. When a user selects a contact class for a new contact, the attributes of this class appear on the **Attributes** tab of the *Contacts* form as additional elements for which the user selects the appropriate values. For more information about the use of attributes in Acumatica ERP, see *Attributes*.

On the **General Settings** tab of the *Customer Management Preferences* (CR101000) form (**Data Entry Settings** section), you can specify the default contact class that the system will insert for each contact that you create in the system. Specifying this default class may be useful if a particular contact class is used far more than the others. If you select a default contact class, when a user creates a contact by using the *Contacts* form, the system inserts this class into the **Contact Class** box of the **CRM Info** tab, and inserts the default settings associated with the lead class. If the user changes the default contact class, the system inserts the default settings specified for the newly selected class.

On the *Contact Classes* form, you can specify the following settings for each contact class:

- The identifier and description of the contact class
- The way the system determines the default owner of a contact of the contact class, which can be the user who creates the contact, a user determined through an assignment map, or an owner inherited from the source entity if the contact is created from another entity
- The map to be used for the automatic assignment of a contact of the class during contact creation if the default owner is determined through an assignment map
- The identifiers of the lead class, business account class, and opportunity class that the system specifies by default for a new lead, business account, or opportunity created based on a contact of the class (Thus, the default class settings will be inserted for the new leads, business accounts, and opportunities, so you can create them more quickly.)
- The opportunity stage to be set as the default one for a new opportunity that is created based on a contact of the class
- The default email account that can be used for sending emails to the contacts of the class
- The attributes specific to the contact class, as well as whether they are required or optional

## Contact Classes: Implementation Activity

The following implementation activity will show you how to create a contact class.

> If you have not configured a company with basic settings and you want to practice creating a CRM class, you can perform this activity by using the *U100* dataset. In *U100*, you can also view examples of CRM classes that have been already created and contain all additional settings.

### 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.

### System Preparation

Before you start creating a contact class, you should launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as a system administrator by using the following credentials:

- Username: *gibbs*
- Password: *123*

### Step 1: Creating a Contact Class

To create the *OFFICE* contact class, do the following:

1. Open the *Contact Classes* (CR205000) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area, do the following:
   a. In the **Class ID** box, enter the new class identifier: `OFFICE`.
   b. In the **Description** box, type the following brief description of the class: `Business organizations that make recurrent orders`.
   c. To hide all records of the class from the Self-Service Portal users, make sure that the **Internal** check box is selected.
4. On the form toolbar, click **Save**.

You have created the new contact class.

### Step 2: Specifying the Default Contact Class

To select the *OFFICE* contact class as the default class for newly created contacts, do the following:

1. Open the *Customer Management Preferences* (CR101000) form.
2. On the **General Settings** tab (**Data Entry Settings** section), in the **Default Contact Class** box, select *OFFICE* contact class, which you have created in the previous step of this activity.
3. On the form toolbar, click **Save**.

You have specified the default contact class. For each newly created contact, on the **CRM Info** tab of the *Contacts* (CR302000) form, the system will insert *OFFICE* into the **Contact Class** box.

## Lesson 2.3: Defining Business Account Classes

## Business Account Classes: General Information

In Acumatica ERP, you can group business accounts into classes based on specific characteristics. Accurately grouping business accounts into classes may help you quickly and effectively manage your marketing and sales processes, including the creation of business accounts, the creation of opportunities and customers, and the preparation of financial reports.

This topic provides information about business account classes.

### Learning Objectives

In this chapter, 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

### Applicable Scenarios

You may want to learn how to create a business account class in scenarios that include the following:

- 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.

### Business Account Classes

In Acumatica ERP, you can group business accounts into classes and gather different sets of additional information about the accounts in each business account class. You can define classes on the *Business Account Classes* (CR208000) form based on your company's business needs and get a comprehensive view of your business from leads to revenue. Business account classes help you quickly assign business accounts to owners, define a default email account for sending emails to business accounts, and specify predefined mailing settings, which are used for sending electronic versions of documents (by email) to companies represented by business accounts.

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. When a user creates a business account, the user can first select the applicable business account, which causes the system to use the values of the class as default values for the business account. The system also loads any attributes—UI elements that you can configure, specifying their names, control types (check box, text box, or combo box), and possible values (for boxes with predefined options)—that you have defined for the class, so that the user can enter these values for the business account.

Business account classes also make the creation of business accounts faster and more accurate. When a user is creating a business account on the *Business Accounts* (CR303000) form and selects a business account class on the **CRM Info** tab, the system fills in the values specified for the class; these default values can be overridden.

For each business account class, you can define a set of attributes that allow users to specify additional information about business accounts within the class. An attribute is a characteristic or quality—such as industry, number of employees, or company revenue—that is important to your company but is not already tracked on the *Business Accounts* form. When a user selects a business account class for a new business account, the attributes of this class appear on the **Attributes** tab of the *Business Accounts* form as additional elements for which the user selects the appropriate values. For more information about the use of attributes in Acumatica ERP, see *Attributes*.

On the **General Settings** tab of the *Customer Management Preferences* (CR101000) form (**Data Entry Settings** section) you can specify the default business account class that the system will insert for each business account that you create in the system. Specifying this default class may be useful if a particular business account class is used far more than the others. If you select a default business account class, when a user creates a business account by using the *Business Accounts* form, the system inserts this class into the **Class ID** box of the **CRM Info** tab, and inserts the default settings associated with the lead class. If the user changes the default business account class, the system inserts the default settings specified for the newly selected class.

On the *Business Account Classes* form, you can specify the following settings for each business account class:

- The identifier and description of the business account class.
- The way the system determines the default owner of a business account of the business account class, which can be the user who creates the business account, a user determined through an assignment map, or an owner inherited from the source entity if the business account is created from another entity.
- The map to be used for the automatic assignment of a business account of the class during creation of the business account if the default owner is determined through the assignment map.
- The default email account that can be used for sending emails to the business accounts of the class.
- Attributes that are specific to this business account class: If you specify values for the attributes of a business account and then extend this business account as a customer or vendor account, the resulting account retains these attributes. If the customer or vendor class to which the resulting account belongs also has attributes specified, these attributes are added to the list of attributes of the resulting account.
- Mailing settings that are used for sending electronic versions of documents (by email) to companies represented by business accounts and to employees of your company who are overseeing operations with business accounts of the class. For details, see *Managing Mailings*.

## Business Account Classes: Implementation Activity

The following implementation activity will show you how to create a business account class.

> If you have not configured a company with basic settings and you want to practice creating a CRM class, you can perform this activity by using the *U100* dataset. In *U100*, you can also view examples of CRM classes that have been already created and contain all additional settings.

### 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.

### System Preparation

Before you start creating a business account class, you should launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as a system administrator by using the following credentials:

- Username: *gibbs*
- Password: *123*

### Step 1: Creating a Business Account Class

To create the *BIGSTORE* business account class, do the following:

1. Open the *Business Accounts* (CR303000) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area, do the following:
    a. In the **Business Account Class ID** box, enter the new class identifier: `BIGSTORE`.
    b. In the **Description** box, type the following brief description of the class: `Chain of supermarkets`.
    c. To hide all records of the class from the Self-Service Portal users, make sure that the **Internal** check box is selected.
4. On the form toolbar, click **Save**.

You have created the new business account class.

### Step 2: Specifying the Default Business Account Class

To select the *BIGSTORE* business account class as the default class for newly created business accounts, do the following:

1. Open the *Customer Management Preferences* (CR101000) form.
2. On the **General Settings** tab (**Data Entry Settings** section), in the **Default Business Account Class** box, select *BIGSTORE*.
3. On the form toolbar, click **Save**.

You have specified the default business account class. For each newly created business account, on the **CRM Info** tab of the *Business Accounts* (CR303000) form, the system will insert *BIGSTORE* into the **Class ID** box.

# Lesson 2.4: Defining Campaign Classes

## Campaign Classes: General Information

In Acumatica ERP, you can group marketing campaigns into classes based on specific characteristics. Accurately grouping campaigns into classes may 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.

This topic provides information about campaign classes.

### Learning Objectives

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

### Applicable Scenarios

You may want to learn how to 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.

### Campaign Classes

In Acumatica ERP, you can easily group marketing campaigns of different types into classes and gather different sets of additional information about these campaigns. You can define campaign classes based on your company's business needs and get a comprehensive view of your management of marketing campaigns by using campaign statistics, as described in *Marketing Campaigns: General Information*.

A campaign class is a grouping entity for marketing campaigns that share at least one common characteristic. Campaign classes are used for reporting purposes and for providing default values during data entry of individual campaigns. When a user creates a marketing campaign, the user can first select the applicable campaign class, which causes the system to use the values of the class as default values for the campaign. The system also loads any attributes—UI elements that you can configure, specifying their names, control types (check box, text box, or combo box), and possible values (for boxes with predefined options)—that you have defined for the class, so that the user can enter these values for the campaign.

You create campaign classes for marketing campaigns on the *Campaign Classes* (CR202500) form. Each campaign class defines a type of campaign your company uses, such as indoor or outdoor advertising, telemarketing activities, web seminars, marketing events, or mass mailings.

A campaign class has a brief description and may include a list of attributes that you specify for the class to gather class-specific information about campaigns. When a user is creating a marketing campaign on the *Marketing Campaigns* (CR202000) form and selects this campaign class, these attributes are listed on the **Attributes** tab of the form, and a user enters the values of these attributes.

You can change a campaign class for an existing campaign. If the newly selected campaign class includes any of the attributes included in the previously selected campaign class, the system preserves the values of these attributes that were previously specified for the campaign and removes all other attributes from the previous campaign class from the **Attributes** tab of the *Marketing Campaigns* form.

## Campaign Classes: Implementation Activity

The following implementation activity will show you how to create a campaign class.

> If you have not configured a company with basic settings and you want to practice creating a CRM class, you can perform this activity by using the *U100* dataset. In *U100*, you can also view examples of CRM classes that have been already created and contain all additional settings.

### 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.

### System Preparation

Before you start creating a campaign class, you should launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as a system administrator by using the following credentials:

- Username: *admin*
- Password: *123*

### Step: Creating a Campaign Class

To create the *BANNER* campaign class, do the following:

1. Open the *Campaign Classes* (CR202500) form.
2. On the form toolbar, click **Add New Record**.
3. In the Summary area, do the following:
   a. In the **Campaign Class** box, enter the new class identifier: `BANNER`.
   b. In the **Description** box, type the following brief description of the class: `Billboard advertising`.
4. On the form toolbar, click **Save**.

You have created a new campaign class.

# Lesson 2.5: Defining Opportunity Classes

## Opportunity Classes: General Information

In Acumatica ERP, you can group opportunities into classes based on specific characteristics. Accurately grouping opportunities into classes may help you quickly and effectively manage your sales processes, including conversion of leads to opportunities, estimation of probabilities of closing a deal, and preparation of financial reports.

This topic provides information about opportunity classes.

## Learning Objectives

In this chapter, 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

## Applicable Scenarios

You may want to learn how to create an opportunity class in scenarios that include the following:

- You need to give users the ability to group opportunities that contain either products or services.
- You need to give users the ability to group direct sales opportunities and partner sales opportunities.
- You need to give users the ability to group standard opportunities and opportunities that contain special offers and discounts.
- You need to give users the ability to group primary and renewal opportunities.
- You need to give users the ability to estimate the probabilities of closing the deal by using opportunity stages.

## Opportunity Classes

In Acumatica ERP, you can group opportunities into classes and gather different sets of additional information about these opportunities. You create opportunity classes on the *Opportunity Classes* (CR209000) form.

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. When a user creates a opportunity, the user can first select the applicable opportunity class, which causes the system to use the values of the class as default values for the opportunity. The system also loads any attributes—UI elements that you can configure, specifying their names, control types (check box, text box, or combo box), and possible values (for boxes with predefined options)—that you have defined for the class, so that the user can enter these values for the opportunity.

Opportunity classes also make the creation of opportunities faster and more accurate. When a user is creating an opportunity on the *Opportunities* (CR304000) form and selects an opportunity class on the **CRM Info** tab, the system fills in the values specified for the class; these default values can be overridden.

For each opportunity class, you can define a set of attributes that allow users to specify additional information about opportunities within the class. An attribute is a characteristic or quality—such as industry, product characteristic, or type of partner commission—that is important to your company but is not already tracked on the *Opportunities* form. When a user selects an opportunity class for a new opportunity, the attributes of this class appear on the **Attributes** tab of the *Opportunities* (CR304000) form as additional elements for which the user selects the appropriate values. For more information about the use of attributes in Acumatica ERP, see *Attributes*.

On the **General Settings** tab of the *Customer Management Preferences* (CR101000) form (**Data Entry Settings** section), you can specify the default opportunity class that the system will insert for each opportunity that you create in the system. Specifying this default class may be useful if a particular opportunity class is used far more than the others. If you select a default opportunity class, when a user creates an opportunity by using the *Opportunities* form, the system inserts this class into the **Opportunity Class** box of the **CRM Info** tab, and inserts the default settings associated with the opportunity class. If the user changes the default opportunity class, the system inserts the default settings specified for the newly selected class.

When you create a new opportunity class, you should activate at least one stage. For details, see the following section.

## Opportunity Stages

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. The accuracy of revenue estimation heavily depends on the correct identification of the opportunity stage and on the accuracy of the related probability.

You use the **Stages** tab of the *Opportunity Classes* (CR209000) form to define opportunity stages and their probabilities. The full list of opportunity stages is available for use in all opportunity classes. When you create a particular opportunity class, you select the **Active** check box for the opportunity stages that need to be included in this class and clear this check box for the opportunity stages that are not included for this class. If the check box is cleared for a stage that has been used in any opportunity of the class, this stage becomes excluded from the list of available stages for opportunities of the class (but it still will be shown in reports). For each opportunity class, at least one stage should be active.

The system offers the following predefined opportunity stages (any of these stages may be skipped as needed or new stages can be created, depending on the company's business processes that support sales):

- *Prospect*: The contact or business account associated with the opportunity is a known prospect, but it is not clear whether this prospect is interested in the offered products or services.
- *Nurture*: A salesperson is collecting information about the prospect or customer's interest in products and services; the salesperson may also be negotiating with the prospect or customer. This stage may be useful if your company decides not to use leads.
- *Qualification*: A salesperson is determining the prospect or customer's interest in purchasing particular products or services.
- *Development*: A salesperson is clarifying the prospect or customer's requirements for products or services, as well as the budget, delivery schedule, and project scope (if applicable).
- *Solution*: A salesperson is negotiating with the prospect about the content of the solution (proposal) and the set of products or services that the prospect or customer wants to buy. The salesperson is creating product demonstrations or other evaluation tools, and the prospect or customer is evaluating the products or services.
- *Proof*: A salesperson has developed a solution (that is, a proposal). The prospect or customer is evaluating the solution. A primary sales quote may be selected at this stage.

- *Negotiation*: A salesperson and the prospect or customer are negotiating prices, discounts, and terms of the proposed deal.
- *Won*: The prospect or customer has accepted the proposal and is ready to sign the contract or place an order (or has already done this). Some companies prefer to advance the opportunity to this stage only after the invoice has been issued, or even after a payment is received.

To comply with the company's business processes that support sales, you can modify this list by adding new stages or by removing unnecessary ones, which will affect all existing opportunity classes. For each new stage, you should specify the identifier, name, probability percentage, and sort order.

## Opportunity Classes: Implementation Activity

In the following implementation activity, you will learn how to create an opportunity class.

> If you have not configured a company with basic settings and you want to practice creating a CRM class, you can perform this activity by using the *U100* dataset. In *U100*, you can also view examples of CRM classes that have been already created and contain all additional settings.

### 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.

### System Preparation

Before you start creating an opportunity class, you should launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as a system administrator by using the following credentials:

- Username: *gibbs*
- Password: *123*

### Step 1: Creating an Opportunity Class

To create the *RENEW* opportunity class, do the following:

1. Open the *Opportunity Classes* (CR209000) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area, do the following:
    a. In the **Opportunity Class ID** box, enter the new class identifier: `RENEW`.
    b. In the **Description** box, type the following brief description of the class: `Renewal opportunities with long-term customers.`
    c. To hide all records of the class from the Self-Service Portal users, make sure that the **Internal** check box is selected.

d. To include activities associated with the related contact in the list of activities on the **Activities** tab of the *Opportunities* (CR304000) form, select the **Show Contact Activities** check box.

4. On the **Stages** tab, in the **Active** column, select the check box for the *Won* stage.
5. On the form toolbar, click **Save**.

You have created the new opportunity class.

## Step 2: Defining Opportunity Stages

To define opportunity stages for the *RENEW* opportunity class, do the following:

1. While you are still viewing the *RENEW* opportunity class on the *Opportunity Classes* (CR209000) form, open the **Stages** tab. In the table, the predefined stages are listed.
2. In the **Active** column, do the following:
   a. Select the check boxes for the following stages:
      - *Development*
      - *Solution*
      - *Proof*
      - *Negotiation*

   b. Make sure that the check boxes are cleared for the following stages:
   - *Prospect*
   - *Nurture*
   - *Qualification*

   For the renewal opportunities with existing customers in your company, these stages are not needed.
3. In the **Probabilities** column, review the values for each active stage.
4. In the **Sort Order** column, review the values for each active stage.
5. On the form toolbar, click **Save**.

You have defined the stages for the *RENEW* opportunity class.

## Step 3: Specifying the Default Opportunity Class

To select the *RENEW* opportunity class as the default class for newly created opportunities, do the following:

1. Open the *Customer Management Preferences* (CR101000) form.
2. On the **General Settings** tab (**Data Entry Settings** section), in the **Default Opportunity Class** box, select *RENEW*.
3. On the form toolbar, click **Save**.

You have specified the default opportunity class. For each newly created opportunity, on the **CRM Info** tab of the *Opportunities* (CR304000) form, the system will insert *RENEW* into the **Class ID** box.

# Lesson 2.6: Defining Case Classes

## Case Classes: General Information

In Acumatica ERP, you group cases into classes based on specific characteristics. Using case classes may help you effectively manage your customer support processes, such as distributing cases, collecting information to help with solving customers' problems related to your company's products or services, and preparing support reports to evaluate the performance of your support team.

This topic provides information about the creation and settings of case classes.

### Learning Objectives

In this chapter, 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

### Applicable Scenarios

You may want to learn how to create a case class in scenarios that include the following:

- 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.

### Case Classes

In Acumatica ERP, 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. When a user creates a case, the user can first select the applicable case class, which causes the system to use the values of the class as default values for the case. The system also loads any attributes—UI elements that you can configure, specifying their names, control types, and possible values (for boxes with predefined options)—that you have defined for the class, so that the user can enter these values for the case.

You can define case classes on the *Case Classes* (CR206000) form based on your company’s business needs. Case classes help you quickly distribute cases between owners, define measurable service-level agreement (SLA) details, and specify default settings for cases of a class, including billing settings.

Case classes also make the creation of cases faster and more accurate. When a user is creating a case on the *Cases* (CR306000) form and selects a case class in the Summary area of the form, the system fills in the values that have been specified for the class; these default values can be overridden, if needed.

For each case class, you can define a set of attributes that give users the ability to specify additional information about cases within the class. An attribute is a characteristic or quality—such as industry, number of employees, or interest—that is important to your company but is not already tracked on the *Cases* form. When a user selects a case class for a new case, the attributes of this class appear on the **Attributes** tab of the *Cases* form as additional elements for which the user selects the appropriate values. For each attribute, you can define the type of control that represents it in the UI (check box, text box, or combo box) and specify the possible values, if applicable. For more information about the use of attributes in Acumatica ERP, see *Attributes*.

On the *Cases* form, for a case class, a system administrator can also define a set of user-defined fields, which hold the values of attributes. As soon as the user-defined fields have been added to the form, the system displays the **Document** and **User-Defined Fields** tabs in the Summary area. The user-defined fields are displayed as UI elements on the **User-Defined Fields** tab. They can be required or optional, depending on the settings defined by the system administrator. For more information about user-defined fields, see *User-Defined Fields*.

On the **General Settings** tab of the *Customer Management Preferences* (CR101000) form (**Data Entry Settings** section), you can specify the default case class that the system will insert for each case that you create in the system. Specifying this default class may be useful if a particular case class is used far more than the others. If you select a default case class, when a user creates a case by using the *Cases* form, the system inserts this class into the **Class ID** box of the Summary area, and inserts the default settings associated with the case class. If the user changes the default case class, the system inserts the default settings specified for the newly selected class.

On the *Case Classes* form, you can specify the following settings for each case class:

- The identifier and description of the case class.
- The default email account that can be used for sending emails to customers who have contacted your customer support team.
- The billing modes, which are *Per Case* or *Per Activity*. For details, see *Case Classes: Modes of Case Billing*.
- The labor items that represent a particular type of employee labor, such as the work done by a consultant or a technician, and are used for recording the hourly rates of employees, the general ledger accounts to be used, and the applicable taxes. For details, see *Case Classes: Modes of Case Billing*.
- The billable time settings.
- The period in days during which a case can be reopened.
- The severity levels and target response times corresponding to these levels. For details, see *Case Classes: Severity Levels and Response Times*.
- The attributes specific to the case class, as well as whether they are required or optional.

## Case Classes: Severity Levels and Response Times

In Acumatica ERP, you can specify a level of severity for each support case based on the impact to your customer's business. This capability helps you provide on-time support and handle cases efficiently.

For each case class, you can define the applicable severity levels that can be selected for cases of the class and the response times to resolve a case of the selected severity level. Each severity level and its recommended response time can be specified on the **Reaction** tab of the *Case Classes* (CR206000) form. For each row that you add, in the **Severity** column, you can select one of the following options:

- *Urgent*: The issue reported in the case has resulted in a critical problem for the customer's business, and no workaround is available.
- *High*: The issue the customer has reported can severely affect the customer's business. A temporary workaround may be available.
- *Medium*: The issue reported in the case can result in a non-critical problem for your customer's business.
- *Low*: The case is a minor issue, a general question from a customer, or a recommendation for products or services that your company offers.

For each row you have added, in the **Reaction Time** column, you specify the time period for the response by typing the number of days, hours, and minutes.

When you create a case on the *Cases* (CR306000) form, you can select its severity level in the **Severity** box of the Summary area based on the severity levels defined for the case class. If severity levels and response times have been defined on the *Case Classes* form for the class this case belongs to, and if you select a value in the **Severity** box of the *Cases* form, the system inserts in the **SLA** box the date and the time when the case should be resolved.

## Case Classes: Modes of Case Billing

In Acumatica ERP, you can select the mode of billing a customer—for a case or for each activity associated with a case—for each case class. If the *Time Reporting on Activity* feature is enabled on the *Enable/Disable Features* (CS100000) form, you can select a billing mode in the **Billing Mode** box on the **Details** tab of the *Case Classes* (CR206000) form, and the mode determines how cases of the class are billed. If the feature is disabled, the system automatically assigns the *Per Case* billing mode to every new case class, and you can bill a customer only for a case.

With the *Time Reporting on Activity* feature enabled, for the case class, you select one of the following modes of case billing:

- *Per Case*: You select this mode if you want a case of the class to be billed after it is closed. The total amount in an invoice for the work done will include all activities associated with the case.

  If the *Contract Management* feature in the *Advanced Financials* group of features is enabled on the *Enable/Disable Features* (CS100000) form, you can select the **Require Contract** box on the **Details** tab of the *Case Classes* form, and the system will require a contract to be specified for each case of the class.

  Also, you can specify a labor item and an overtime labor item for the class in the **Labor Item** and the **Overtime Labor Item** box, respectively, on the **Details** tab of the form.

- *Per Activity*: You select this mode if you want to bill individual activities associated with each case of the class. You can use this option for case classes that you select for long-lasting cases that cannot be closed by the end of the billing period.

  If the *Contract Management* feature in the *Advanced Financials* group of features is enabled on the *Enable/Disable Features* (CS100000) form, the system selects the **Require Contract** box and makes it unavailable for editing; with this setting, a user must specify a contract for each case of the class in the **Contract** box on the **Additional Info** tab of the *Cases* (CR306000) form.

Also, when this mode is selected, the **Labor Items** tab appears on the *Cases* form. On this tab, you can specify the labor items to be used for specific earning types. The system will use labor items as sources of general ledger accounts to be used for transactions; for details, see *Labor Items: General Information*.

## Case Classes: Implementation Activity

The following implementation activity will show you how to create a case class.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### 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.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*
  - *Case Management* in the *Customer Management* group of features
  - *Time Reporting on Activity* in the *Monitoring & Automation* group of features
- On the *Non-Stock Items* (IN202000) form, the *TECHNICIAN* non-stock item of the *Labor* type, which represents the labor of SweetLife's specialists who repair and maintain juicers, has been created.
- On the *Labor Rates* (PM209900) form, the labor cost rate associated with the *TECHNICIAN* non-stock item of the *Labor* type has been created.
- On the *Attributes* (CS205000) form, the *MODEL* attribute, which holds the value of the model of a juicer, has been created.

### System Preparation

Before you start creating a case class, you should launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as a system administrator by using the following credentials:

- Username: *gibbs*
- Password: *123*

## Step 1: Creating a Case Class

To create the *JMAINT* case class, do the following:

1. Open the Case Classes (CR2060PL) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area of the *Case Classes* (CR206000), which opens, do the following:
   a. In the **Case Class ID** box, enter the new class identifier: `JMAINT`.
   b. In the **Description** box, type the following brief description of the class: `Maintenance of juicers`.
   c. Select the **Internal** check box to hide all records of the class from the Self-Service Portal users.
4. On the **Details** tab of the form, do the following:
   a. In the **Default Email Account** box, select *SweetLife Support* (the name of the *support@sweetlife.com* email account).
   b. Select the **Billable** check box. Notice that the system has selected the **Require Customer** check box and made it unavailable for editing, which means that each time a user creates a case of the class, the system requires the user to specify a business account of the *Customer* type for the case.
   c. Select the **Enable Billable Option Override** check box to give users the ability to override the default selection of the **Billable** check box for cases of the class.
   d. In the **Billing Mode** box, select *Per Case*.
   e. In the **Labor Item** box, select *TECHNICIAN*.
   f. In the **Overtime Labor Item** box, select *TECHNICIAN*.
   g. In the **Round Time by** box, type: `1:00`.
   h. In the **Min Billable Time** box, select *1:00*.
5. On the **Attributes** tab, do the following:
   a. On the table toolbar, click **Add Row**.
   b. In the **Attribute ID** column, select *MODEL*.
6. On the form toolbar, click **Save**.

You have created the new case class.

## Step 2: Specifying the Default Case Class

To select the *JMAINT* case class as the default class the system automatically inserts for newly created cases, do the following:

1. Open the *Customer Management Preferences* (CR101000) form.

2. On the **General Settings** tab (**Data Entry Settings** section), in the **Default Case Class** box, select the *JMAINT* case class, which you have created in the previous step of this activity.

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

You have specified the default case class. For each newly created case, in the Summary of the *Cases* (CR306000) form, the system will insert *JMAINT* into the **Case Class** box.

# Lesson 3: Configuring Duplicate Validation

## Duplicate Validation: General Information

Acumatica ERP provides flexible tools for eliminating duplicate records. An implementation consultant or a system administrator can configure duplicate validation for lead, contact, and business account records. To prevent the creation of duplicate records, the system can validate leads, contacts, and business accounts for duplicates before a user creates a new record in the system manually or imports a batch of new records to the system by using an import scenario or API services. This topic provides general information about configuring duplicate validation in Acumatica ERP.

### Learning Objectives

In this chapter, 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

### Applicable Scenarios

You may want to configure duplicate validation in scenarios that include the following:

- You have initially implemented Acumatica ERP, the *Customer Management* feature is included in your license, and you need to give users the ability to use the duplicate validation functionality.
- You need to change the current duplicate validation settings in the system.

### Duplicate Validation in Acumatica ERP

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. The system can also check a record for duplicates on entry (before the record is saved at least once).

Records can be validated for duplicates if the following setup tasks have been performed in the system:

1. The *Lead/Contact Duplicate Validation* feature is enabled on the *Enable/Disable Features* (CS100000) form.

2. Default duplicate validation rules have been defined for each type of records (leads, contacts, and business accounts) on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form. For details, see *Duplicate Validation: Rules*.

3. Additional duplicate validation settings may also be specified on the *Customer Management Preferences* form. For details, see *Validating Records for Duplicates: Implementation Checklist*.

4. The calculation of grams, which are used for the calculation of validation scores, has been performed for each contact, lead, or business account record on the *Calculate Grams* (CR503400) form. For details, see *Duplicate Validation: Calculation of Validation Scores*.

After the setup tasks have been performed, users can do the following:

- Validate individual records for duplicates, merge duplicate records into one record, which involves updating the information in the target record (the record that you want to keep as a result of the merge) and closing the duplicate record. Optionally, users can link the related leads, contacts, and business accounts. As a result, the leads, contacts, and business accounts in the system are free of duplication, which improves productivity for the personnel, who can now work with consistent and reliable data. For details, see *Validating Records for Duplicates: General Information*.

- Validate multiple records for duplicates. For details, see *Validating Records for Duplicates: Mass-Validation of Records*.

# Duplicate Validation: Rules

Lead, contact, and business account records have the same internal fields (and corresponding UI elements), which contain the contact settings of an individual or company. You can specify your organization's rules for validating duplicate leads, contacts, and business accounts. Also, you can select the fields to be used in this validation; for example, you can compare only email addresses or compare multiple settings, such as email addresses, last names, and company names.

## Duplicate Validation Process

You determine how the duplicate validation process is performed by using the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form. The lower part of this tab contains the following tabs, on which you can specify duplicate validation rules that the system uses during the duplicate validation process:

- **Lead and Contact Validation Rules** tab: The system uses these rules to validate leads against other leads and contacts, as well as to validate contacts against other contacts and leads.

- **Lead and Account Validation Rules** tab: These rules are used to validate leads and contacts against business accounts.

- **Account Validation Rules** tab: The system uses these rules to validate business accounts against other business accounts.

## General Rules for Duplicate Validation

In Acumatica ERP, you specify most of the duplicate validation rules similarly for leads, contacts, and business accounts, although on different lower tabs of the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form.

Consider the example of the lead and contact validation rules that are specified on the **Duplicate Validation Settings** tab (see the following screenshot).

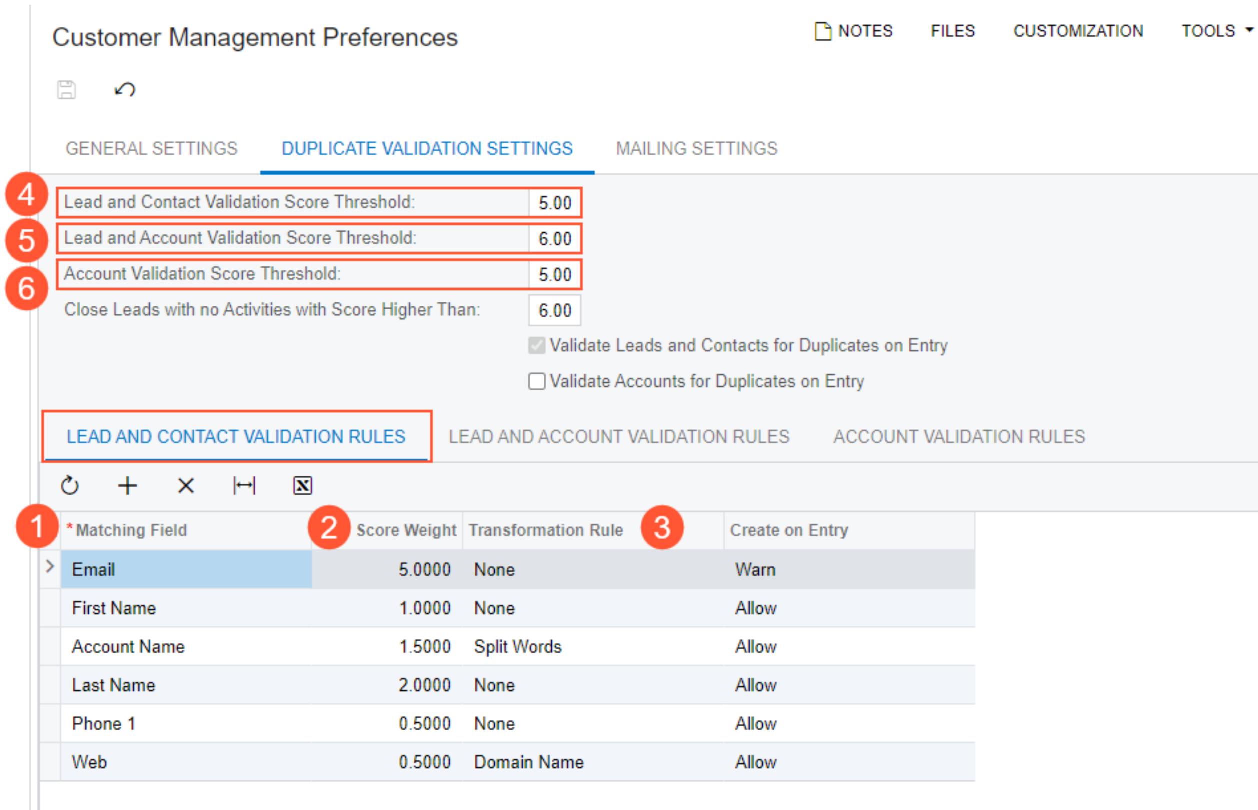



**Figure: Example of duplicate validation rules**

The **Lead and Contact Validation Rules** (shown in the screenshot above), **Lead and Account Validation Rules**, and **Account Validation Rules** tabs all have the same columns. On each tab, you can specify the following settings: matching fields, score weights, transformation rules, and rules for checking records for duplicates on entry. You can use the following columns:

- **Matching Field** (see Item 1 in the screenshot above): In this column, you can specify each field whose values the system will compare during the validation process.

- **Score Weight** (Item 2): The score weight you specify here indicates the share that the field contributes to the total validation score if two values match. Typically, the total validation score of a pair of compared records is calculated as the sum of the weights of the fields whose values match. With the rules specified in the example shown in the screenshot, if phone numbers match, the weight of *0.5* is added, and if both last names and phone numbers match, the weight of *2.5* is added.

- **Transformation Rule** (Item 3): For each listed field, this column contains one of the following options, which indicate the rule the system will use to transform the matching field values before comparing them:

  - *None* (default): No additional rules are applied; the whole values are compared as they are.

  - *Split Words*: The system will compare separate words that make up the two values.

  - *Domain Name*: The system will compare the applicable domain name, such as *domain.com*. In an email address or a URL (the *Web* field), the system will use the domain part of the address. For example, if the email address is *email@example.com*, then only *example.com* will be used for comparison.

In the following boxes in the Summary area of the **Duplicate Validation Settings** tab, you can specify the threshold value used to determine whether the compared records are possible duplicates:

- **Lead and Contact Validation Threshold** box (Item 4): Used with the rules you specify on the **Lead and Contact Validation Rules** tab
- **Lead and Account Validation Threshold** box (Item 5): Used with the rules you specify on the **Lead and Account Validation Rules** tab
- **Account Validation Threshold** box (Item 6): Used with the rules you specify on the **Account Validation Rules** tab

The total score of the fields listed in the **Score Weight** column of each tab in which you specify rules should be greater than or the same as the value in the corresponding threshold box of the Summary area.

The interaction of the threshold settings of the Summary area and the tabs with the respective validation rules works as follows: During duplicate validation of a record, the system compares all the values in the **Score Weight** column of the appropriate tab, adds the validation scores for the values that match, and then compares the total validation score to the threshold specified in the corresponding box of the Summary area. If the total validation score equals or exceeds this threshold value, the compared records are considered possible duplicates.

## Duplicate Validation Rules for Leads and Contacts

You can configure the system to check whether a lead or contact has duplicates before the record is created by using the settings on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form. Consider the example in the following screenshot of duplicate validation rules that are specified on this tab for leads and contacts.

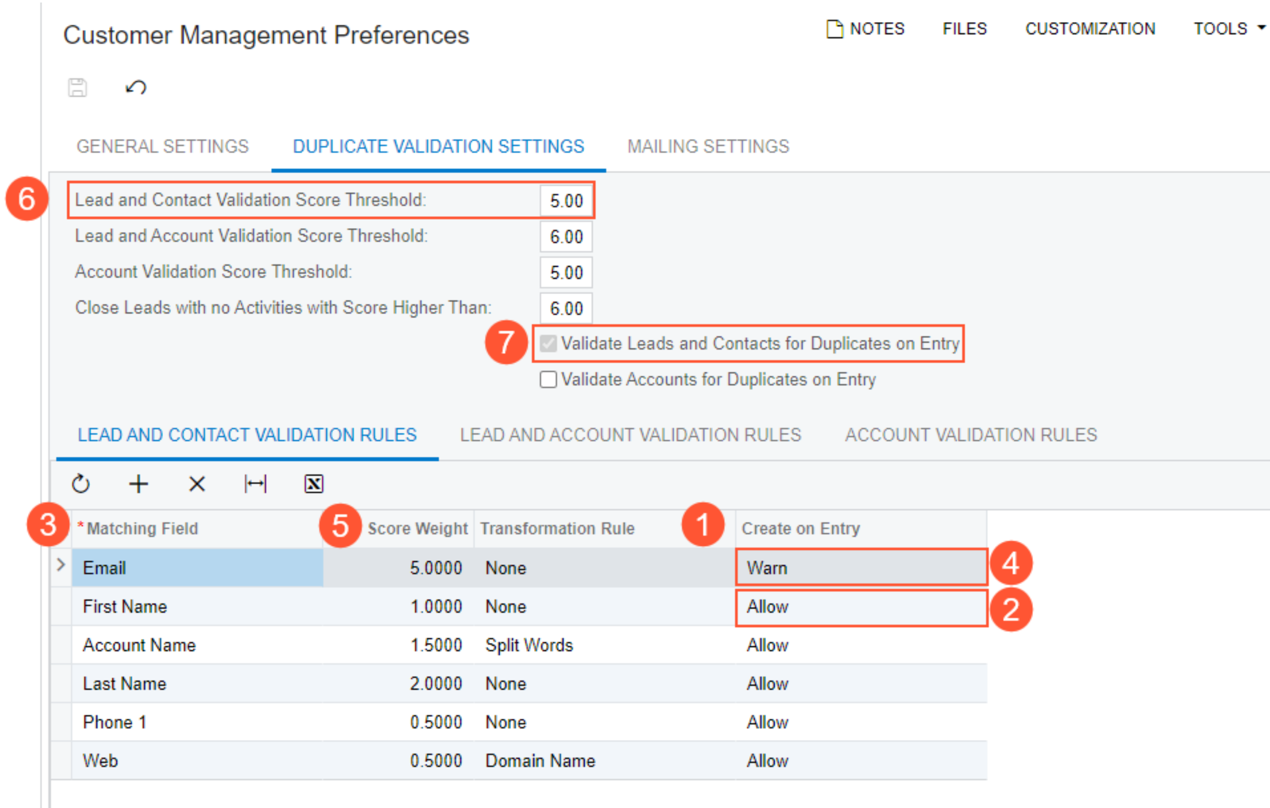



**Figure: Example of duplicate validation rules for leads and contacts**

You configure validation rules for leads and contacts on the **Lead and Contact Validation Rules** tab (in the lower part of the **Duplicate Validation Settings** tab).

> This section describes (and the example demonstrates) the configuration of validation rules for leads and contacts. The configuration of validation rules for leads and business accounts works similarly, except that you use the **Lead and Account Validation Rules** tab.

In the **Create on Entry** column (see Item 1 in the screenshot above), you can select one of the following options, which indicate the rule the system will use to check duplicate settings for leads and contacts when a lead or contact is saved for the first time:

- *Allow* (default; see Item 2): For a newly created lead or contact record, the system checks the values in the **Matching Field** column (Item 3) to find duplicates if the **Validate Leads and Contacts for Duplicates on Entry** check box (Item 7) is manually selected in the Summary area of the **Duplicate Validation Settings** tab. However, the system will not display a warning message when a user saves the record.

  As a result, if a user creates a lead or contact that has a duplicate setting, the system inserts *Possible Duplicate* in the **Duplicate** box of the Summary area of the *Leads* (CR301000) or *Contacts* (CR302000) form, respectively.

- *Warn* (Item 4): The system makes the value in the **Score Weight** column (Item 5) equal to the value in the **Lead and Contact Validation Threshold** box (Item 6). The **Validate Leads and Contacts for Duplicates on Entry** check box becomes selected and unavailable for editing (Item 7).

As a result, if a user tries to create a lead or contact that has a duplicate setting, the system does the following:

- Inserts *Possible Duplicate* in the **Duplicate** box of the Summary area of the *Leads* or *Contacts* form, respectively.
- Displays a warning message if the user tries to save the lead or contact.

The user can choose to save the lead or contact or to cancel record creation.

With the settings shown in the screenshot above, if the email address of a new lead or contact is the same as the email address of the existing lead or contact, the system inserts *Possible Duplicate* in the **Duplicate** box of the Summary area of the *Leads* or *Contacts* form, respectively, and displays a warning message if you try to save the lead or contact.

## Duplicate Validation Rules for Business Accounts

You can configure the system to check whether a business account has duplicates before the account is created or to prevent the creation of duplicate business accounts on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form. The system can prevent the manual creation of a business account or the mass creation of multiple business accounts through an import scenario or API.

Consider the example in the following screenshot of the validation rules for business accounts that are specified on the **Duplicate Validation Settings** tab.

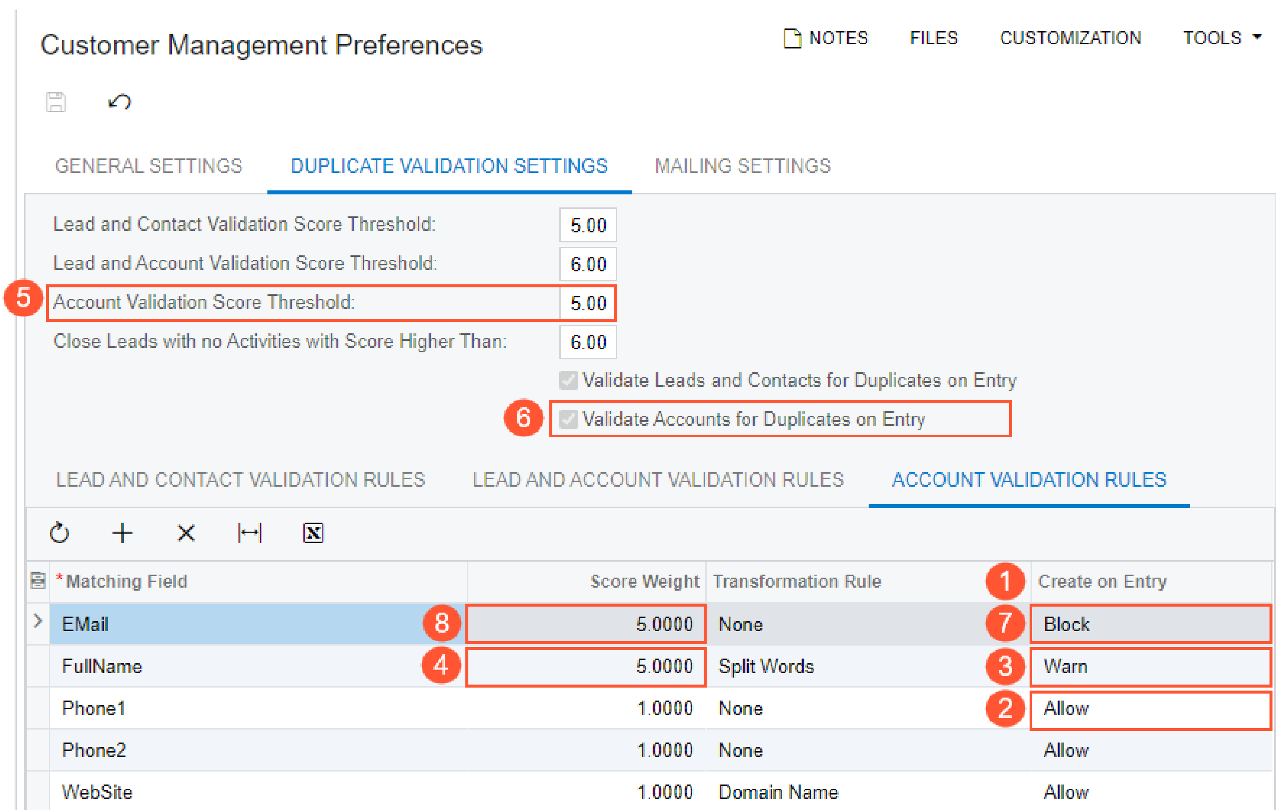



**Figure: Example of duplicate validation rules for business accounts**

You configure validation rules for business accounts on the **Account Validation Rules** tab (in the lower part of the **Duplicate Validation Settings** tab). In the **Create on Entry** column (see Item 1 in the screenshot above), you can select one of the following options, which indicate the rule the system will use to check duplicate settings when a business account record is created:

- *Allow* (default; see Item 2): The system checks the values in the **Matching Field** column for a newly created business account record to find duplicates if the **Validate Accounts for Duplicates on Entry** check box (Item 6) in the Summary area of the **Duplicate Validation Settings** tab is manually selected. However, the system will not display a warning message when a user saves the newly created account.

  As a result, if the user creates a business account that has a duplicate, the system inserts *Possible Duplicate* in the **Duplicate** box on the **CRM Info** tab of the *Business Accounts* (CR303000) form.

- *Warn* (Item 3): The system makes the value in the **Score Weight** column (Item 4) equal to the value in the **Account Validation Threshold** box (Item 5). The **Validate Accounts for Duplicates on Entry** check box (Item 6) in the Summary area of the **Duplicate Validation Settings** tab becomes selected and unavailable for editing.

  As a result, if a user tries to create a business account that has a duplicate, the system inserts *Possible Duplicate* in the **Duplicate** box of the *Business Accounts* form and displays a warning message. The user can choose to save the business account or to cancel record creation.

- *Block* (Item 7): If this option is selected for the setting in the **Matching Field** column, the system makes the value in the **Score Weight** column (Item 8) equal to the value in the **Account Validation Threshold** box (Item 5) of the Summary area of the **Duplicate Validation Settings** tab. The **Validate Accounts for Duplicates on Entry** check box (Item 6) becomes selected and unavailable for editing.

  As a result, the system prevents the creation of a duplicate business account and shows an error message when you try to save the account.

With the settings shown in the screenshot above, if the email address of a new business account is the same as the email address of the existing business account, the system prevents the creation of a duplicate account and shows an error message when you try to save the account. If the full name of a new business account is the same as the full name of the existing business account, the system inserts *Possible Duplicate* in the **Duplicate** box on the *Business Accounts* form and displays a warning message if you try to save the account.

## Duplicate Validation: Calculation of Validation Scores

In Acumatica ERP, grams are used for the calculation of validation scores for each lead, contact, or business account. Each record has a number of settings, such as *Last Name*, *Email*, or *Class ID*. The grams value assigned to a particular record is defined by the total number of settings that are involved in the calculation of the validation score.

As a rule, validation scores are calculated automatically if the *Lead/Contact Duplicate Validation* feature is enabled on the *Enable/Disable Features* (CS100000) form.

You need to recalculate validation scores on the *Calculate Grams* (CR503400) form in the following cases:

- Validation rules have been changed on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form.

- A batch of new records was imported into Acumatica ERP before the *Lead/Contact Duplicate Validation* feature was enabled.

# Duplicate Validation: Implementation Activity

The following implementation activity will show you how to configure duplicate validation in Acumatica ERP.

If you have not configured a company with basic settings and you want to practice configuring duplicate validation, you can perform this activity by using the *U100* dataset.

## 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.

## System Preparation

Before you start configuring duplicate validation, you should sign in to the system as a system administrator by using the following credentials:

- Username: *gibbs*
- Password: *123*

## Step 1: Reviewing Duplicate Validation Settings

To review the existing duplicate validation settings, do the following:

1. On the *Customer Management Preferences* (CR101000) form, open the **Duplicate Validation Settings** tab.
2. Make sure that the duplicate validation settings have been specified as follows:
    - On the **Lead and Contact Validation Rules** tab, the settings have been specified as follows:
        - In the **Score Weight** column, the total validation score makes *10.5* and exceeds the value in the **Lead and Contact Validation Score Threshold** box.
        - For the *Email* matching field, in the **Create on Entry** column, the *Warn* option is selected and in the **Score Weight** column, the validation score makes *5* and equals the value in the **Lead and Contact Validation Score Threshold** box.
    - On the **Lead and Account Validation Rules** tab, in the **Score Weight** column, the total validation score makes *7* and exceeds the value in the **Lead and Account Validation Score Threshold** box.

- On the **Account Validation Rules** tab, in the **Score Weight** column, the total validation score makes *7.5* and exceeds the value in the **Account Validation Score Threshold** box.

3. In the Summary area of the **Duplicate Validation Settings** tab, the settings have been specified as follows:

   - The **Validate Leads and Contacts for Duplicates on Entry** check box is selected and unavailable for editing.
   - The **Validate Accounts for Duplicates on Entry** check box is cleared.

## Step 2: Modifying Validation Rules for Business Accounts

Suppose that your marketing and sales team need the system to validate business accounts on entry by comparing email addresses, and to prevent the creation of a business account if another business account with an identical email address already exists.

To modify the validation rules for business accounts, do the following:

1. On the *Customer Management Preferences* (CR101000) form, open the **Duplicate Validation Settings** tab.

2. On the **Account Validation Rules** tab, do the following:

   a. In the **Create on Entry** column, for the *Email* matching field, select *Block*.

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

   For the *Email* matching field, notice that the system has changed the value in the **Score Weight** column to *5*, which equals the value in the **Account Validation Score Threshold** box (Summary area of the form). Also notice that the **Validate Accounts for Duplicates on Entry** check box has become selected and unavailable for editing.

   This will cause the system to check each new email address of a business account for duplication when a user specifies the email address on the *Business Accounts* (CR303000) form. If the email address of a business account is identical to the email address existing in the system and the user tries to save the account for the first time, the system will show an error message to the user.

You have modified the validation rules for business accounts. To cause the system to use the rules that you have just updated, you need to recalculate validation scores (grams), as described in the next step.

## Step 3: Calculating Validation Scores (Grams) for All Records

To calculate validation scores (grams) for all records, do the following:

1. Open the *Calculate Grams* (CR503400) form.

2. On the form toolbar, click **Process All**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has been completed, the results of grams calculation.

3. When the processing has been completed, click **Close** to close the dialog box. The list of the records on the *Calculate Grams* form no longer contains any records.

You have calculated grams for all records. Now the system will validate business accounts according to the new rules that you have modified in this activity.

# Lesson 4: Configuring Assignment Maps

## Assignment Maps: General Information

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.

### Learning Objectives

In this chapter, 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

### Applicable Scenarios

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

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

### Assignment Maps

An assignment map is a set of rules, actions related to rules, and conditions that the system can use for assigning a record or a number of records for processing to a particular individual or a group of people. You can configure assignment maps for distributing leads, contacts, business accounts, opportunities, cases, and email activities. You can create multiple assignment maps for the same entity, such as a lead or opportunity. You create assignment maps on the *Assignment Maps* (EP205010) form.

An assignment map may include any number of rules, which are executed sequentially. You create rules as follows:

1. On the **Rules** tree, you add a rule. Each rule in an assignment map includes conditions and actions to be performed if the conditions are met. Rules should divide records of the same type into non-intersecting sets. If rules allow the same records to be assigned to two or more groups, all assignments will be performed in the workgroup or individual employee that is mentioned higher in the list of rules, and the records will never reach the second workgroup or employee.
2. On the **Conditions** tab, you add rule conditions that assignment criteria should meet. Conditions, which are specified for each rule, are based on the values of settings in records. Settings are specified manually by a user or automatically by the system on the data entry form when a record is created. For classes that are used to group records, particular attributes can be specified; users can specify the attribute values in records (such as leads) on the data entry form used to create the record.
3. On the **Rule Actions** tab, you select an owner or a workgroup (or both).

If a condition or rule is no longer required in an assignment map, but you want to keep it in the list of rules, you can temporarily deactivate it by clearing the **Active** check box in the settings of that condition or rule on the *Assignment Maps* form. The name of an inactive rule starts with the *(Inactive)* prefix in the **Rules** pane.

After you have configured the assignment map for distributing leads, contacts, business accounts, opportunities, or cases, you need to specify this map on the *Customer Management Preferences* (CR101000) form (**Assignment Settings** section of the **General Settings** tab) to cause the system to determine the owners for these records by using this assignment map. If you have configured an assignment map for leads or opportunities, and then specified this assignment map on the *Lead Classes* (CR207000) or *Opportunity Classes* (CR209000) form respectively, the system will use this assignment map for distributing leads or opportunities of the class between owners or workgroups. After you have configured the assignment map for distributing email activities, you need to specify this map on the *System Email Accounts* (SM204002) form to cause the system to determine the owners for email activities according this assignment map for email activities.

### Mass-Assignment of Records

When an assignment map has been configured, users can assign groups of records that do not have owners specified by using a mass-processing form. On this form, users can assign selected records or all records that do not have owners, and the system uses the assignment map specified on the *Customer Management Preferences* (CR101000) form to determine the owners of the records.

The system can use assignment maps for mass-assignment of records that a user performs on the following forms:

- *Assign Leads* (CR503010)
- *Assign Contacts* (CR503011)
- *Assign Business Accounts* (CR503310)
- *Assign Opportunities* (CR503110)
- *Assign Cases* (CR503210)

## Assignment Maps: To Configure a Lead Assignment Map

The following implementation activity will show you how to configure a lead assignment map in Acumatica ERP.

The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## 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.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Employees* (EP203000) form, the following employees have been created:
  - *Bill Owen*
  - *Joanne Simpson*
- On the *Company Tree* (EP204061) form, the company tree has been configured and it includes the *Marketing Stores* and the *Marketing Food Services* workgroups in the *Marketing* department.
- On the *Lead Classes* (CR207000) form, the following lead classes have been created:
  - *STORE* (for leads that are supermarkets and other stores)
  - *BAKERY*
  - *CAFE* (which includes leads that are restaurants and cafes)

## Process Overview

In this activity, you will do the following:

1. Create a lead assignment map on the *Assignment Maps* (EP205010) form.
2. Select the default lead assignment map on the *Customer Management Preferences* (CR101000) form.

## System Preparation

Before you start configuring a lead assignment map, you should do the following:

1. Sign in to the system as a system administrator by using the following credentials:
   - Username: *gibbs*
   - Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Creating a Lead Assignment Map

To create a lead assignment map, do the following:

1. Open the *Assignment and Approval Maps* (EP205500) form.
2. On the form toolbar, click **Add Assignment Map**. A new assignment map opens on the *Assignment Maps* (EP205010) form.
3. In the Summary area of the form, do the following:
   a. In the **Name** box, type `Default Lead Assignment Map`.
   b. In the **Entity Type** box, select *Leads*.
4. In the **Rules** tree, click **Add Rule** to add the rule for distributing the leads of the *STORE* class.
5. On the **Conditions** tab, do the following:
   a. In the **Description** box, type `Marketing Stores`.
   b. Make sure that the **Active** check box is selected.
   c. On the table toolbar, click **Add Row**.
   d. In the **Entity** box, select *Lead*.
   e. In the **Field Name** box, select *Lead Class*.
   f. In the **Condition** box, select *Equals*.
   g. In the **Value** box, select *STORE*.
6. On the **Rule Actions** tab, do the following:
   a. In the **Assign Ownership To** box, select *Employee*.
   b. In the **Workgroup** box, select *Marketing Stores* as follows:
      1. Click the magnifier button.
      2. In the dialog box that contains the company tree select **Marketing > Marketing Stores**
      3. Double click *Marketing Stores* to cause the system to close the dialog box and insert this value in the **Workgroup** box.
7. In the **Rules** tree, click **Add Rule** to add the rule for distributing the leads of the *CAFE* and *BAKERY* classes.
8. On the **Conditions** tab, do the following:
   a. In the **Description** box, type `Marketing Food Services`.
   b. Make sure that the **Active** check box is selected.

c. On the table toolbar, click **Add Row**.

d. In the **Entity** box, select *Lead*.

e. In the **Field Name** box, select *Lead Class*.

f. In the **Condition** box, select *Equals*.

g. In the **Value** box, select *CAFE*.

h. In the **Operator** box, select *Or*.

j. On the table toolbar, click **Add Row**.

k. In the **Entity** box, select *Lead*.

l. In the **Field Name** box, select *Lead Class*.

m. In the **Condition** box, select *Equals*.

n. In the **Value** box, select *BAKERY*.

9. On the **Rule Actions** tab, do the following:

    a. In the **Assign Ownership To** box, select *Employee*.

    b. In the **Workgroup** box, select *Marketing Food Services* as follows:

        1. Click the magnifier button.

        2. In the dialog box that contains the company tree select **Marketing > Marketing Food Services**

        3. Double click *Marketing Food Services* to cause the system to close the dialog box and insert this value in the **Workgroup** box.

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

You have created and configured the *Default Lead Assignment Map*. Now you need to specify this map on the *Customer Management Preferences* (CR101000) form.

## Step 2: Selecting a Default Lead Assignment Map

To select a default lead assignment map, do the following:

1. Open the *Customer Management Preferences* (CR101000) form

2. On the **General Settings** tab, in the **Lead Assignment Map** box of the **Assignment Settings** section, select *Default Lead Assignment Map*.

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

You have selected the *Default Lead Assignment Map* as the default lead assignment map. Now users can mass-assign leads of the *STORE* and *CAFE* classes on the *Assign Leads* (CR503010) form and the system will distribute these leads according to the rules in this assignment map.

# Assignment Maps: To Configure an Opportunity Assignment Map

The following implementation activity will show you how to configure an opportunity assignment map in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## 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.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Employees* (EP203000) form, the following employees have been created:
  - *David Chubb*
  - *Pam Brawner*
- On the *Company Tree* (EP204061) form, the company tree has been configured and it includes the *Product Sales* and the *Project Sales* workgroups in the *Sales* department.
- On the *Opportunity Classes* (CR209000) form, the *PRODUCT* and *PROJECT* opportunity classes have been created.

## Process Overview

In this activity, you will do the following:

1. Create an opportunity assignment map on the *Assignment Maps* (EP205010) form.
2. Select the default opportunity assignment map on the *Customer Management Preferences* (CR101000) form.

## System Preparation

Before you start configuring an opportunity assignment map, you should do the following:

1. Sign in to the system as a system administrator by using the following credentials:

- Username: *gibbs*
- Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Creating an Opportunity Assignment Map

To create an opportunity assignment map, do the following:

1. Open the *Assignment and Approval Maps* (EP205500) form.
2. On the form toolbar, click **Add Assignment Map**. A new assignment map opens on the *Assignment Maps* (EP205010) form.
3. In the Summary area of the form, do the following:
   a. In the **Name** box, type `Default Opportunity Assignment Map`.
   b. In the **Entity Type** box, select *Opportunities*.
4. In the **Rules** tree, click **Add Rule** to add the rule for distributing the opportunities of the *PRODUCT* class.
5. On the **Conditions** tab, do the following:
   a. In the **Description** box, type `Product Sales`.
   b. Make sure that the **Active** check box is selected.
   c. On the table toolbar, click **Add Row**.
   d. In the **Entity** box, select *Opportunity*.
   e. In the **Field Name** box, select *Class ID*.
   f. In the **Condition** box, select *Equals*.
   g. In the **Value** box, select *PRODUCT*.
6. On the **Rule Actions** tab, do the following:
   a. In the **Assign Ownership To** box, select *Employee*.
   b. In the **Workgroup** box, select *Product Sales* as follows:
      1. Click the magnifier button.
      2. In the dialog box that contains the company tree select **Sales > Product Sales**.
      3. Double click *Product Sales* to cause the system to close the dialog box and insert this value in the **Workgroup** box.
7. In the **Rules** tree, click **Add Rule** to add the rule for distributing the opportunities of the *PROJECT* class.
8. On the **Conditions** tab, do the following:

a. In the **Description** box, type `Project Sales`.

b. Make sure that the **Active** check box is selected.

c. On the table toolbar, click **Add Row**.

d. In the **Entity** box, select *Opportunity*.

e. In the **Field Name** box, select *Class ID*.

f. In the **Condition** box, select *Equals*.

g. In the **Value** box, select *PROJECT*.

9. On the **Rule Actions** tab, do the following:

   a. In the **Assign Ownership To** box, select *Employee*.

   b. In the **Workgroup** box, select *Project Sales* as follows:

      1. Click the magnifier button.
      2. In the dialog box that contains the company tree select **Sales > Project Sales**.
      3. Double click *Project Sales* to cause the system to close the dialog box and insert this value in the **Workgroup** box.

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

You have created and configured the *Default Opportunity Assignment Map*. Now you need to specify this map on the *Customer Management Preferences* (CR101000) form.

### Step 2: Selecting a Default Opportunity Assignment Map

To select a default opportunity assignment map, do the following:

1. Open the *Customer Management Preferences* (CR101000) form
2. On the **General Settings** tab, in the **Opportunity Assignment Map** box of the **Assignment Settings** section, select *Default Opportunity Assignment Map*.
3. On the form toolbar, click **Save**.

You have selected the *Default Opportunity Assignment Map* as the default opportunity assignment map. Now users can mass-assign opportunities of the *PRODUCT* and *PROJECT* classes on the *Assign Opportunities* (CR503110) form and the system will distribute these opportunities according to the rules in this assignment map.

## Assignment Maps: To Configure a Case Assignment Map

The following implementation activity will show you how to configure a case assignment map in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## 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.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Employees* (EP203000) form, the following employees have been created:
  - *Marcos Garcia*
  - *Jeffrey Vega*
  - *David Chubb*
- On the *Company Tree* (EP204061) form, the company tree has been configured and it includes the *Delivery* and the *Technical Support* workgroups in the *Aftersales*.
- On the *Case Classes* (CR206000) form, the *PRESALE*, *DELIVERY* and *JREPAIR* case classes have been created.

## Process Overview

In this activity, you will do the following:

1. Create a case assignment map on the *Assignment Maps* (EP205010) form.
2. Select the default case assignment map on the *Customer Management Preferences* (CR101000) form.

## System Preparation

Before you start configuring a case assignment map, you should do the following:

1. Sign in to the system as a system administrator by using the following credentials:
   - Username: *gibbs*
   - Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Creating a Case Assignment Map

To create a case assignment map, do the following:

1. Open the *Assignment and Approval Maps* (EP205500) from.
2. On the form toolbar, click **Add Assignment Map**. A new assignment map opens on the *Assignment Maps* (EP205010) form.
3. In the Summary area of the form, do the following:
   a. In the **Name** box, type `Default Case Assignment Map`.
   b. In the **Entity Type** box, select *Cases*.
4. In the **Rules** tree, click **Add Rule** to add the rule for distributing the cases of the *PRESALE* class.
5. On the **Conditions** tab, do the following:
   a. In the **Description** box, type `Presales Requests`.
   b. Make sure that the **Active** check box is selected.
   c. On the table toolbar, click **Add Row**.
   d. In the **Entity** box, select *Case*.
   e. In the **Field Name** box, select *Class ID*.
   f. In the **Condition** box, select *Equals*.
   g. In the **Value** box, select *PRESALE*.
6. On the **Rule Actions** tab, do the following:
   a. In the **Assign Ownership To** box, select *Employee*.
   b. In the **Employee** box, select *David Chubb*.
7. In the **Rules** tree, click **Add Rule** to add the rule for distributing the cases of the *DELIVERY* class.
8. On the **Conditions** tab, do the following:
   a. In the **Description** box, type `Sales and Delivery`.
   b. Make sure that the **Active** check box is selected.
   c. On the table toolbar, click **Add Row**.
   d. In the **Entity** box, select *Case*.
   e. In the **Field Name** box, select *Class ID*.
   f. In the **Condition** box, select *Equals*.
   g. In the **Value** box, select *DELIVERY*.

9. On the **Rule Actions** tab, do the following:
    a. In the **Assign Ownership To** box, select *Employee*.
    b. In the **Workgroup** box, select *Delivery* as follows:
        1. Click the magnifier button.
        2. In the dialog box that contains the company tree select **Aftersales > Delivery**.
        3. Double click *Delivery* to cause the system to close the dialog box and insert this value in the **Workgroup** box.
10. In the **Rules** tree, click **Add Rule** to add the rule for distributing the cases of the *JREPAIR* class.
11. On the **Conditions** tab, do the following:
    a. In the **Description** box, type `Repair and Maintenance`.
    b. Make sure that the **Active** check box is selected.
    c. On the table toolbar, click **Add Row**.
    d. In the **Entity** box, select *Case*.
    e. In the **Field Name** box, select *Class ID*.
    f. In the **Condition** box, select *Equals*.
    g. In the **Value** box, select *JREPAIR*.
12. On the **Rule Actions** tab, do the following:
    a. In the **Assign Ownership To** box, select *Employee*.
    b. In the **Workgroup** box, select *Technical Support* as follows:
        1. Click the magnifier button.
        2. In the dialog box that contains the company tree select **Aftersales > Technical Support**.
        3. Double click *Technical Support* to cause the system to close the dialog box and insert this value in the **Workgroup** box.
13. On the form toolbar, click **Save**.

You have created and configured the *Default Case Assignment Map*. Now you need to specify this map on the *Customer Management Preferences* (CR101000) form.

## Step 2: Selecting a Default Case Assignment Map

To select a default case assignment map, do the following:

1. Open the *Customer Management Preferences* (CR101000) form
2. On the **General Settings** tab, in the **Case Assignment Map** box of the **Assignment Settings** section, select *Default Case Assignment Map*.

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

You have selected the *Default Case Assignment Map* as the default case assignment map. Now users can mass-assign cases of the *PRESALE*, *DELIVERY* and *JREPAIR* case classes on the *Assign Cases* (CR503210) form and the system will distribute these cases according to the rules in this assignment map.

# Part 2: Marketing Operations

In Part 2 of this training course, you will learn how to use Acumatica ERP to complete the following basic tasks that are usually performed by a marketing team:

- Creating leads manually and by using an import scenario
- Validating leads for duplicates
- Assigning leads to owners and workgroups
- Managing leads by using emails and activities, such as a phone call
- Nurturing leads by sending newsletters and promotional emails
- Managing marketing campaigns
- Qualifying leads

For completing activities of the lessons in this part, you will use a company with the *U100* dataset preloaded, which provides a fully configured company with sample data specially designed for this course.

Each activity in this part is to be completed under a user account of a marketing manager. You can find the credentials to use for sign in to the prepared *U100* tenant in the *System Preparation* section of each activity.

The lessons of this part are independent: You can complete activities in any order.

# Lesson 5: Acquiring Audience

## Lesson 5.1: Creating Leads

### Leads: General Information

The processing of leads in Acumatica ERP starts with adding leads to the system. This topic provides information about lead creation in Acumatica ERP.

#### Learning Objectives

In this chapter, you will do the following:

- Create a lead manually
- Import leads from a purchased list
- Create a lead by using the Acumatica add-in for Outlook

#### Applicable Scenarios

You may want to learn how to create leads in Acumatica ERP in scenarios that include the following:

- You have obtained some contact information about a potential customer.
- You have acquired a list of cold leads (individuals or organizations who never contacted your organization or expressed any interest in your products or services) from a vendor or a public source.
- You have started working with the system and need to import your existing leads from your legacy system into Acumatica ERP.
- You have received an email from a potential customer.

## Marketing Leads in Acumatica ERP

A marketing lead is contact information representing an individual or a company that has a potential interest in products or services your organization offers. Leads make up the organization's marketing audience, which is the target for marketing activities, such as marketing campaigns or advertisements.

A marketing manager defines the organization's marketing strategy, goals, and target audience, as well as acquiring and managing data on the marketing audience. When the audience data has been acquired, the marketing manager can create the needed leads in the system.

## Lead Creation

Lead creation in Acumatica ERP consists of any of the following general steps:

- Creating leads manually
- Importing lead data from external sources
- Scanning a lead's business card into the Acumatica mobile app

As soon as leads have been added to the system and checked for duplicates, as described in *Validating Records for Duplicates*, you can assign these leads to owners either one by one or through mass processing according to the rules that have been specified in the system, and the owners start working on these leads, as described in *Assigning Leads to Owners and Workgroups*.

In Acumatica ERP, you can create a lead in any of the following ways:

- By manually entering lead data on the *Leads* (CR301000) form. For detailed instructions, see *Leads: To Create a Lead Manually*.
- On the *Contacts* (CR302000) or *Business Accounts* (CR303000) form, if you click **Actions > Create Lead**.
- By using import scenarios to import lists of leads on the *Import by Scenario* (SM206036) form. For detailed instructions, see *Leads: To Import Leads From a Purchased List*.
- By creating a lead from the Acumatica add-in for Outlook based on the details of the selected email recipient or sender. For detailed instructions, see *Acumatica Add-In for Outlook* and *To Create a Lead by Using the Acumatica Add-In*.
- By enabling integration with web services on the *Web Services* (SM207040) form for the automatic import of leads. For details, see *Web Service Endpoints*.
- By using the integration with HubSpot. For details, see *Configuring Integration with HubSpot*.

- By activating the functionality of incoming mail processing on the *System Email Accounts* (SM204002) form for the automatic creation of leads based on information about the sender. For details, see *Incoming Mail Processing*.
- By using the Acumatica mobile app.
- By scanning a lead's business card into the Acumatica mobile app. For details, see *Leads: Business Card Recognition* and *Leads: To Create a Lead Through Business Card Recognition*.

## Contact Information

On the **Contact Info** tab of the *Leads* (CR301000) form, you can specify such contact-related settings as the name, contact information, and address of the selected lead. Also, this tab holds information about the lead's consent to the processing of personal data if the *GDPR Compliance Tools* feature is enabled on the *Enable/Disable Features* (CS100000) form. (For details about GDPR compliance tools, see *Handling Personal Data*.)

If the **Override** check box on the **Contact Info** tab of the *Leads* form is cleared, the contact information of the selected lead is synchronized with the contact information of the related contact and business account on the *Contacts* (CR302000) form and the *Business Accounts* (CR303000) form, respectively. If the check box is selected, the contact information for the selected lead on the *Leads* form can differ from the contact information of the related record on the *Contacts* and *Business Accounts* forms, as well as from the contact information of the leads related to this lead. The synchronization or overriding of settings applies to all the settings on the **Contact Info** tab.

## Synchronization of Settings in Leads, Contacts, and Business Accounts

In Acumatica ERP, you can easily synchronize the contact-related settings of a lead with the same settings in the contact and business account related to that lead. With this synchronization turned on, changes to the contact information of any of these entities causes the settings in the related entities to be updated as well.

> The synchronization or overriding of settings applies to all the settings on the **Contact Info** tab of the *Leads* (CR301000) form, all the settings on the **Details** tab of the *Contacts* (CR302000) form, and the contact and address settings (of the primary contact of the business account) on the **General** tab of the *Business Accounts* (CR303000) form.

You can synchronize contact information in leads, contacts, and business accounts by using the **Override** check box on the **Details** tab of the *Contacts* (CR302000) form as follows:

- If the check box is cleared and the business account related to the contact has not been extended as a customer or a vendor yet, the contact information of the contact on the *Contacts* form is synchronized with the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms, respectively, and can be updated in both directions. That is, if you update the contact and address settings on any of these forms, the settings will be also updated on the related forms.
- If the check box is selected, the contact information for the selected contact on the *Contacts* form can differ from the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms. If contact information is updated on any of these forms, the changes are not applied to the other forms.

### Flexible Classification of Leads

In Acumatica ERP, you can easily categorize leads into different classes and gather different sets of additional information about leads of different classes. A lead class is a grouping entity for leads that can make the creation of leads faster and more accurate. When you create a new lead, the system can automatically assign a class to this lead and you can change the class as needed. For each class, you can create a set of attributes, which give users the ability to further classify leads within the class. An attribute is a characteristic or quality—such as number of employees, industry, or products and services a lead is interested in—that is important to your company but is not already tracked on the *Leads* (CR301000) form. For details, see *Defining Lead Classes*.

When a class for a lead has been selected, the attributes assigned to this class appear on the **Attributes** tab of the *Leads* form as additional elements that can be used to specify information about the lead.

A system administrator can customize the *Leads* form to add to the Summary area the **User-Defined Fields** tab that holds the attributes. By using these fields, you can easily specify the attributes for the leads you are working with. For details, see *Attributes* and *User-Defined Fields*.

## Leads: To Create a Lead Manually

The following activity demonstrates how to create a lead manually in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have received a call from Sam Collins, the bakery manager of Muffin Secret, a bakery that cooks pastries, usually with jam filling. Sam would like to purchase 50 jars each of apple, orange, and cherry jam and wonders what discount he can obtain from the SweetLife if he chooses to buy the jams.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, and gives users the ability to manage sales opportunities, contacts, marketing lists, and campaigns.
- On the *Lead Classes* (CR207000) form, the *BAKERY* class, which defines SweetLife's leads that represent bakery employees, has been created. The *INTEREST* attribute has been created and specified for this lead class.
- On the *Customer Management Preferences* form, in the **Default Lead Class** box, the *BAKERY* class has been specified.
- On the *Leads* (CR301000) form, the **User-Defined Fields** tab, which holds the values of attributes, has been added, and the **Interested in** box has been added to the tab.

## Process Overview

In this activity, you will create a lead on the *Leads* (CR301000) form.

## System Preparation

Before you start creating leads manually, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
    - Username: *owen*
    - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step: Creating a Lead Manually

To create a lead manually, do the following:

1. Open the Leads (CR3010PL) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area of the *Leads* (CR301000) form, which opens, do the following:
    a. In the **Description** box, add: `The bakery manager submitted an inquiry on the corporate website about a discount for 150 jars of apple, orange, and cherry jam`.
    b. In the **Source** box, select *Other*.
4. On the **Contact Info** tab, specify the following contact information for the lead:
    a. **First Name**: `Sam`
    b. **Last Name**: `Collins`
    c. **Account Name**: `Muffin Secret`
    d. **Job Title**: `Bakery Manager`
    e. **Email**: `s.collins@muffin.secret.example.com`
    f. **Business 1**: `+1 (212) 509-6005`
    g. **Address Line 1**: `2359 Southern Street`
    h. **City**: `New York`
    j. **Country**: `United States of America`
5. On the **CRM Info** tab, in the **Lead Class** box, select the *BAKERY* class.
6. In the **User-Defined Fields** tab of the Summary area, in the **Interested in** box, select *Jam*.

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

You have created the lead in the system. On the **Document** tab of the Summary area of the *Leads* form, you can see *Sam Collins* in the **Lead ID** box and *New* in the **Status** box.

## Leads: To Import Leads From a Purchased List

The following activity demonstrates how to import a purchased list of leads to Acumatica ERP by using an import scenario.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. SweetLife uses purchased lists as sources of leads. The lists are imported into Acumatica ERP so that all records are stored in a single place, managed, and classified. You have acquired a new purchased list, `PurchasedLeadsStores.xlsx`, which has the contact information of employees at stores and supermarkets. You need to import these leads from the Microsoft Excel file to Acumatica ERP.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS101000) form, the *Customer Management* feature has been enabled.
- On the *Lead Classes* (CR207000) form, the *STORE* lead class has been added.
- On the *Data Providers* (SM206015) form, the *Lead Import from Purchased List* data provider has been added and configured.
- On the *Import Scenarios* (SM206025) form, the *Import Leads from Purchased List* import scenario has been configured. This scenario can be used for the import of leads from a Microsoft Excel file to Acumatica ERP. The *Lead Import from Purchased List* data provider is used for this import scenario. The imported leads will belong to the *STORE* lead class. For details, see *Configuring Import Scenarios*.

### Process Overview

On the *Import by Scenario* (SM206036) form, you will select the *Import Leads from Purchased List* import scenario and then upload to the system the Microsoft Excel file with the purchased list of leads. After that, you will prepare the data so that the system validates the rows of records, and then you will initiate the import process.

### System Preparation

Before you start importing leads from a purchased list to Acumatica ERP, do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:

- Username: *owen*
- Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.
3. Download the file *PurchasedLeadsStores.xlsx* to your computer.

### Step: Importing Leads From a Purchased List

To import leads from the purchased list in the *PurchasedLeadsStores.xlsx* file, do the following:

1. Open the *Import by Scenario* (SM206036) form.
2. In the **Name** box of the Summary area, select *Import Leads from Purchased List*.
3. On the form toolbar, click **Clear Data** to make sure that the history of scenario execution and prepared data has been cleared.
4. In the **Warning** dialog box, which opens, click **Yes**.
5. On the form title bar, click **Files**.
6. In the **Files** dialog box, which opens, do the following:
   a. Click **Browse**.
   b. In the window that opens, find the `PurchasedLeadsStores.xlsx` file.
   c. Click **Upload**. The information about the uploaded file is displayed in the table of the **Files** dialog box.
   d. Close the **Files** dialog box.
7. On the form toolbar, click **Prepare**. The table 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, notice that the **Number of Records** box contains *10*, which represents the number of leads that have been prepared to be imported in the system.
8. On the form toolbar, click **Import** to initiate the import of the selected records. A green check mark appears on the form toolbar when the process has completed successfully. Notice that in the table, for the imported records, the check boxes in the **Processed** column are selected.

You have imported to the system leads from the purchased list in the `PurchasedLeadsStores.xlsx` file. On the *Leads* (CR301000) form, you can see all newly imported leads.

# Lesson 5.2: Validating Records for Duplicates

## Validating Records for Duplicates: General Information

Duplicate records in your marketing data may cause data quality problems that result in lost productivity for your marketing and sales teams. A large number of duplicate leads, contacts, and business accounts could trigger the sending of the same marketing materials multiple times to the same contact or business account. The probability of duplicates significantly increases each time that you add to the system a large batch of new records. To address these issues, Acumatica ERP provides flexible tools for eliminating duplicate records.

## Learning Objectives

In this chapter, you will do the following:

- Get familiar with the process of duplicate validation in the system
- Validate individual leads and contacts for duplicates
- Merge duplicate leads
- Link leads and contacts
- Validate multiple leads for duplicates

## Applicable Scenarios

You may want to learn how to validate records for duplicates in Acumatica ERP in scenarios that include the following:

- You are creating a new lead and need to check this lead for duplicates and process any duplicate records.
- You have imported to the system a batch of new leads and need to check these leads for duplicates.
- You regularly validate all records in the system for duplicates, and it is time to again initiate this process.

## Validation of Records for Duplicates in Acumatica ERP

Acumatica ERP provides the following abilities to validate records for duplicates:

- You can validate an existing individual record by clicking **Actions > Check for Duplicates** on the form toolbar of the *Leads* (CR301000), *Contacts* (CR302000), and *Business Accounts* (CR303000) data entry forms.
- You can validate a new record on entry (before it has been saved at least once). The system can warn you if you try to save a duplicate lead, contact, or business account, or it can block the creation of a duplicate business account if the corresponding settings have been specified on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form, as described in *Duplicate Validation: Rules*. For details about validating new leads and contacts on entry, see *Validation of Individual Leads and Contacts for Duplicates on Entry* and *Validating Records for Duplicates: To Validate a Lead for Duplicates*.
- You can mass-validate groups of records on the *Validate Leads and Contacts* (CR503410) and *Validate Accounts* (CR503420) forms. For details, see *Validating Records for Duplicates: Mass-Validation of Records* and *Validating Records for Duplicates: To Validate Multiple Leads for Duplicates*.

As a result of the validation, the lead, contact, or business account is given the duplicate validation status of either *Validated* or *Possible Duplicate*: The system inserts one of these values in the **Duplicate** box of the Summary area on the *Leads* or *Contacts* form, or the **CRM Info** tab of the *Business Accounts* form, respectively.

If at least one possible duplicate has been found for a record, the **Duplicates** tab appears on the corresponding data entry form: *Leads*, *Contacts*, or *Business Accounts*. On this tab, you can merge duplicate records into one record, as described in *Merging of Records on the Duplicates Tab*, or link records, as described in *Linking of Records on the Duplicates Tab*.

## Validation of Individual Leads and Contacts for Duplicates on Entry

The following description of validating records for duplicates is specific to leads, but duplicate validation on entry is performed similarly for both leads and contacts.

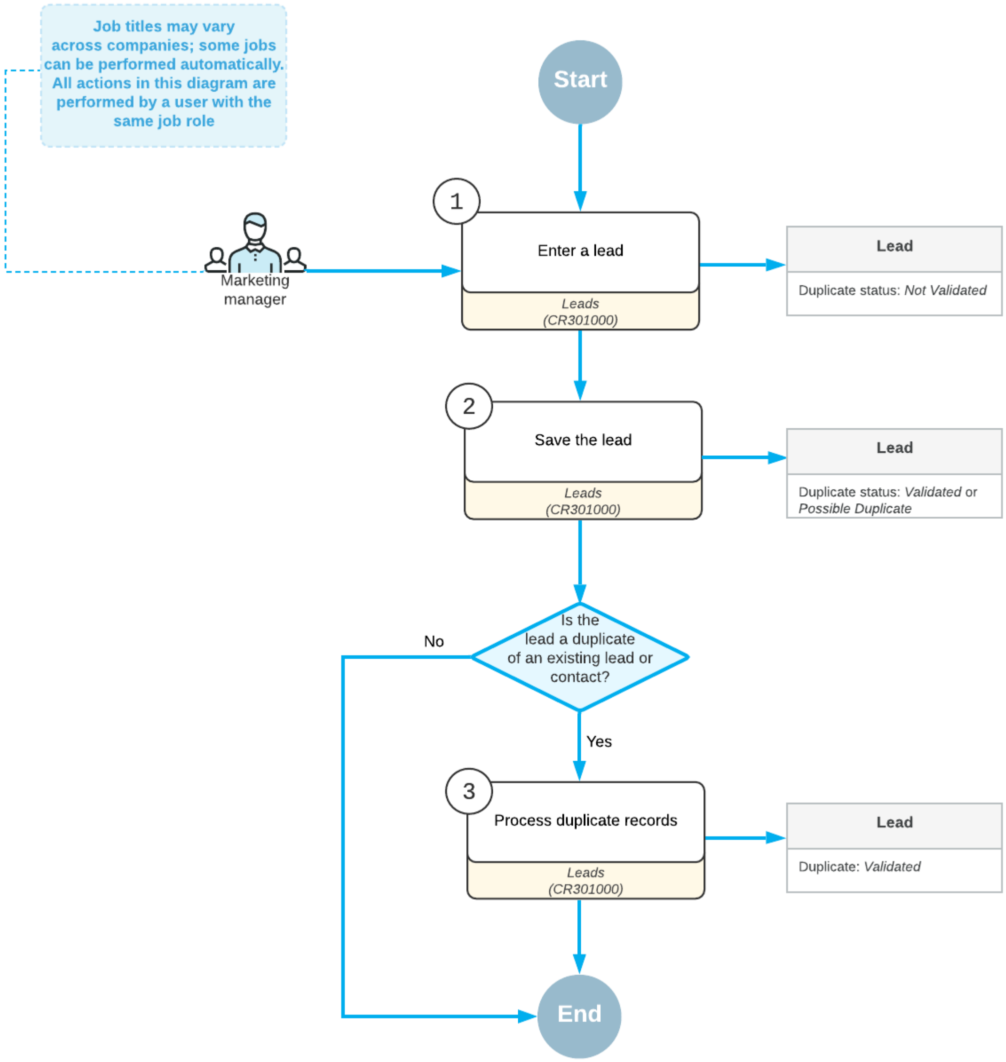
You validate individual leads for duplicates on entry by performing the following steps:

1. Entering a lead's contact information—such as the first name, last name, company name, email, or phone number—on the *Leads* (CR301000) form.
2. Saving the lead by clicking **Save** on the form toolbar, which causes the system to check the lead for duplicates: If at least one duplicate among leads or contacts has been found, you can confirm or cancel the saving of the lead to the system.
3. Processing duplicate records: If you have saved the lead, you can merge duplicate leads into one record, as described in *Merging of Records on the Duplicates Tab*, or link the lead with a duplicate contact, as described in *Linking of Records on the Duplicates Tab*.

## Workflow of Duplicate Validation on Entry for Leads and Contacts

The following diagram illustrates the workflow of duplicate validation on entry for leads. Although the diagram illustrates the workflow for leads, duplicate validation for contacts works similarly.

Duplicate Validation Workflow on Entry for Leads




## Merging of Records on the Duplicates Tab

When you have performed validation for duplicates (whether validation has been performed for a group of records or an individual record), you can merge duplicate records relative to the lead, contact, or business account selected on the data entry form on the **Duplicates** tab of the respective form as follows:

- On this tab of the *Leads* (CR301000) form, you can merge the target (that is, the record that you want to keep as a result of the merge) lead that you select with the selected duplicate lead. Before merging leads, you should indicate to the system which settings to use: those of the target lead or those of the duplicate lead.
- On this tab of the *Contacts* (CR302000) form, you can merge the target contact you select with the selected duplicate contact. Before merging contacts, you should indicate to the system which settings to use: those of the target contact or those of the duplicate contact.

- On this tab of the *Business Accounts* (CR303000) form, you can merge the target business account you select with the selected duplicate business account. Before merging business accounts, you should indicate to the system which settings to use: those of the target business account or those of the duplicate business account.

> - The system does not allow merging of leads that are associated with different contacts: You cannot select such leads for merging.
> - The system does not allow merging of contacts that are associated with different business accounts: You cannot select such contacts for merging.

When you have resolved conflicts between the matching fields and merged the target record with the duplicate record, the duplicate record is no longer displayed on the **Duplicates** tab. For the duplicate record, the system inserts the *Duplicated* value in the **Duplicate** box of the *Leads*, *Contacts*, or *Business Accounts* form and closes this record as duplicate. Also, most of the settings in the Summary area of the form and the settings on the tabs of the form become unavailable for editing. For details, see *Validating Records for Duplicates: To Validate a Lead for Duplicates*.

### Linking of Records on the Duplicates Tab

When you have performed validation for duplicates (whether validation has been performed for a group of records or an individual record), you can associate leads with contacts or business accounts, or contacts with leads and business accounts on the **Duplicates** tab of the respective form as follows:

- On this tab of the *Leads* (CR301000) form, you can associate the lead selected on the form with a contact or business account. When you associate the lead with a contact or business account by clicking **Link to Entity** on the table toolbar of the **Duplicates** tab, you can see the contact or business account in the **Contact** or **Account** box in the Summary area of the form.
- On this tab of the *Contacts* (CR302000) form, you can associate the contact selected on the form with a lead or business account. When you associate the contact with a lead or business account by clicking **Link to Entity**, you can see the lead on the **Leads** tab of the form or the business account in the **Account** box in the Summary area of the form.

When you have associated a record with the lead, contact, or business account, this record is no longer displayed on the **Duplicates** tab. For details, see *Validating Records for Duplicates: To Validate a Lead for Duplicates*.

## Validating Records for Duplicates: Mass-Validation of Records

Acumatica ERP provides the ability to mass-validate groups of records for duplicates.

To mass-validate records, you can use the *Validate Leads and Contacts* (CR503410) and *Validate Accounts* (CR503420) forms. On these forms, you can validate either records with the *Not Validated* duplicate validation status or all listed records.

> Validating all the records in the system may be a time-consuming process if you are validating a very large number of records. You can speed up duplicate validation by using parallel processing. For details, see *Configuring Duplicate Validation*.

If you validate all records, once you click **Process All** on the form toolbar, the system starts processing records one by one, first changing the duplicate validation status of each record to *Not Validated* in the **Duplicate** box of the Summary area on the *Leads* (CR301000) form for a lead and the *Contacts*

(CR302000) form for each contact. As a result of validation, each record is given a duplicate validation status of either *Validated* or *Possible Duplicate*.

> We recommend that you not interrupt the duplicate validation process. If you do, you will not be able to resume it; each time you click **Process All**, the processing starts anew for all listed records.

## Validating Records for Duplicates: To Validate a Lead for Duplicates

Before you start working with a lead (or another employee does so), you may want to make sure that the lead has no duplicate leads in the system. The following activity will show you how to validate a lead for duplicates.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have contact information of two new leads, Jeanne Martinez, a consultant at the BeeJet Store, and John Kimmel, a purchasing manager at the Honeywind Store. Before you start working with the leads in the system, you need to validate the leads for duplicates.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, and gives users the ability to manage sales opportunities, contacts, marketing lists, and campaigns.
  - *Lead/Contact Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality, which you can use to set up and perform automatic validation of lead and contact records for duplicates.
  - On the *Customer Management Preferences* (CR101000) form (**Lead and Contact Validation Rules** tab), in the **Create on Entry** column, the *Warn* option has been selected for the *Email* matching field.
- The *Jeanne Martinez* lead has been created on the *Leads* (CR301000) form.
- The *John K. Kimmel* contact has been created on the *Contacts* (CR302000) form.

### Process Overview

In this activity, you will do the following by using the *Leads* (CR301000) form:

1. Create a lead, validate the lead for duplicates, and merge the contact data of the newly created lead with the contact data of the existing lead. As a result, the system will save only one resulting lead.

2. Create another lead, validate the lead for duplicates, and link the lead record with the existing contact record.

## System Preparation

Before you start validating leads for duplicates, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Validating for Duplicates a Lead That Has a Duplicate Lead

To create a lead and validate the newly created *Jeanne Martinez* lead for duplicates, do the following:

1. Open the Leads (CR3010PL) form.
2. On the form toolbar, click **New Record**.
3. On the **Contact Info** tab of the *Leads* (CR301000) form, which opens, specify the following contact information for the lead:
   a. **First Name**: `Jeanne`
   b. **Last Name**: `Martinez`
   c. **Account Name**: `BeeJet Store`
   d. **Job Title**: `Consultant`
   e. **Email**: `j.martinez@beejet.example.com`
   f. **Web**: `www.beejet.example.com`
   g. **Address Line 1**: `2467 Canterbury Drive`
   h. **City**: `New York`
4. On the **CRM Info** tab, in the **Lead Class** box, select *STORE*.
5. On the form toolbar, click **Save**. The system checks the lead for duplicates and because a duplicate has been found displays the warning message.
6. In the warning message, click **Yes**. Because a possible duplicate has been found, the system has inserted *Possible Duplicate* in the **Duplicate** box of the Summary area of the form and the **Duplicates** tab appears on the form.

You have created and validated the *Jeanne Martinez* lead for duplicates. On the **Duplicates** tab, you can see the duplicate lead record.

## Step 2: Merging Duplicate Leads

To merge two duplicate lead records that contain contact information of Jeanne Martinez, do the following:

1. While you are still viewing the *Jeanne Martinez* lead on the *Leads* (CR301000) form, open the **Duplicates** tab.
2. On the tab, select the unlabeled check box for the possible duplicate lead *Jeanne Martinez*, which is displayed in the table. Notice that the **Merge** button has become available on the table toolbar.

   > If the table lists more than one lead, you can select the unlabeled check boxes for all listed leads. In the next instructions, you will be able to select among the needed settings of these duplicate leads for the target lead record (that is, the record that you want to keep as a result of the merge).

3. Click **Merge**. In the **Target** box of the dialog box that opens, the current lead is displayed. In the table below this box, you can see the list of duplicate settings in the two records you are merging.

   > In the **Target** box, you can click the magnifier button to select the record that you want to keep as the dedicated record. In the lookup table that opens, you can see the list of duplicate leads.

4. While you are still working in the dialog box, do the following:
   a. In the row with *Phone 1* in the **Name** column, select *+1 (646) 638-57-49*. The phone number is missing among the target lead's settings. Suppose that you have checked that the number is correct and want to keep it.
   b. Click **OK** to merge the duplicate leads and close the dialog box. In the Summary area, notice that the system has inserted *Validated* in the **Duplicate** box. The duplicate lead has been merged with the target one; the system has given the duplicate lead record the *Disqualified* status. The **Duplicates** tab is no longer displayed on the form.

You have merged two duplicate leads into one record.

## Step 3: Validating for Duplicates a Lead That Has a Duplicate Contact

To validate the *John K. Kimmel* lead for duplicates, do the following:

1. Open the Leads (CR3010PL) form.
2. On the form toolbar, click **New Record**.
3. On the **Contact Info** tab of the *Leads* (CR301000) form, which opens, specify the following contact information for the lead:
   a. **First Name**: `John K.`
   b. **Last Name**: `Kimmel`
   c. **Account Name**: `Honeywind Store`
   d. **Job Title**: `Purchasing Manager`

   e. **Email**: `j.kimmel@honeywind.example.com`
   f. **Business 1**: `+1 (518) 220-84-76`
   g. **City**: `New York`

4. On the form toolbar, click **Save**. The system checks the lead for duplicates and because a duplicate has been found displays the warning message.
5. In the warning message, click **Yes**. Because a possible duplicate has been found, the system has inserted *Possible Duplicate* in the **Duplicate** box of the Summary area of the form and the **Duplicates** tab appears on the form.

You have created and validated the *John K. Kimmel* lead for duplicates. On the **Duplicates** tab, you can see the duplicate contact record.

## Step 4: Linking the Lead With the Duplicate Contact

To associate the *John K. Kimmel* lead with the *John K. Kimmel* contact and update the settings in the lead record, do the following:

1. While you are still viewing the *Leads* (CR301000) form for the lead *John K. Kimmel*, open the **Duplicates** tab.
2. In the row with *Contact* in the **Type** column, click the *John K. Kimmel* link.
3. In the *Contacts* (CR302000) form, which opens in a pop-up window, do the following:
   a. Review the data in the contact record. Notice that the contact has address settings in the **Address** section of the **Details** tab, but does not have any phone numbers in the **Contact** section.
   b. In the **Business 1** box, type `+1 (518) 220-84-76`.
   c. On the form toolbar, click **Save**.
   d. Close the *Contacts* form.
4. On the table toolbar of the **Duplicates** tab, click **Link to Entity**.
5. In the **Warning** dialog box, which opens, click **Yes**, because you want to replace the contact information specified in the lead record with the information from the contact record; the information in the contact record is correct and has more details. The system closes the dialog box. In the **Contact** box of the Summary area, you can see the *John K. Kimmel* contact that the new lead has been associated with. The **Duplicates** tab no longer contains any records.
6. On the form toolbar, click **Actions > Check for Duplicates** to make sure that no duplicate records for the *John K. Kimmel* lead have been found in the system. Notice that the system has inserted *Validated* in the **Duplicate** box of the Summary area.

You have associated the lead with the contact.

# Validating Records for Duplicates: To Validate Multiple Leads for Duplicates

The following activity demonstrates how to validate multiple records—such as leads, contacts, and business accounts—for duplicates.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have imported to the system a new purchased list of leads that contains the contact information of bakery, cafe, restaurant, and store employees. You need to check these leads for duplicates.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
    - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, and also gives users the ability to manage sales opportunities, contacts, marketing lists, and campaigns.
    - *Lead/Contact Duplicate Validation* in the *Customer Management* group of features: this feature provides the duplicate validation functionality, which you can use to set up and perform automatic validation of lead and contact records for duplicates.
- Validation settings have been specified on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form. For details, see *Configuring Duplicate Validation*.
- A list of lead records that includes duplicates, has been imported from a Microsoft Excel file to the system, which is done on the *Import by Scenario* (SM206036) form.

## Process Overview

In this activity, you will do the following:

1. Identify possible duplicates for newly imported lead records by using the *Validate Leads and Contacts* (CR503410) form.

    > This form is available only if the *Lead/Contact Duplicate Validation* feature is enabled on the *Enable/Disable Features* (CS100000) form. In the *U100* dataset, the feature is enabled.

2. View possible duplicate lead records on the **Duplicates** tab of the *Leads* (CR301000) form.

## System Preparation

Before you start validating records for duplicates, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Validating New Leads for Duplicates

To validate newly imported leads for duplicates, do the following:

> You can perform similar instructions to those in this step to validate newly imported contacts.

1. Open the *Validate Leads and Contacts* (CR503410) form.
2. In the Summary area of the form, select the **Validate New Records Only** option button.
3. On the form toolbar, click **Process All** to start the duplicate validation process. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of duplicate validation.

   > If you want to identify all possible duplicate leads and contacts in the system (for example, to make your marketing data consistent and reliable), you should select the **Validate All Records** option button in the Summary area of the form.

4. When the duplicate validation process has been completed, click **Close** to close the dialog box. Notice that the list of the records on the form no longer contains any records.

You have validated newly imported leads for duplicates. On the *Leads* (CR301000) form, in the **Duplicate** column, the system has inserted the appropriate option for each lead: *Validated* or *Possible Duplicate*.

> For a lead that has the *Disqualified* status, the value in the **Duplicate** column remains *Not Validated*.

Now you can view possible duplicate records, as described in the following step. Merging duplicates and linking the related leads and contacts is described in *Validating Records for Duplicates: To Validate a Lead for Duplicates*.

## Step 2: Viewing Possible Duplicate Records

In the previous step, you have validated newly imported leads in the system for duplicates. Now you need to view the list of leads that have possible duplicates and the *Rita Orozco* lead among these records.

To view possible duplicates, do the following:

1. Open the Leads (CR3010PL) form.
2. In the table, click the column header of the **Duplicate** column.

3. In the Sorting and Filtering Settings dialog box, which opens, create a filter to view only records with the duplicate validation status of *Possible Duplicate* as follows:

   a. Click **Clear All**.

   b. Select *Possible Duplicate*.

   c. Click **OK**.

   The table now lists only the records that have the duplicate validation status of *Possible Duplicate*. Notice the *Rita Orozco* record, which has *Captain Crunchy Bakery* in the **Account Name** column.

4. Click the link in the **Display Name** column in the row with the *Rita Orozco* record.

5. On the *Leads* (CR301000) form, which opens, open the **Duplicates** tab.

Now on the **Duplicates** tab, you can view the identical contact details of the duplicate records and merge duplicates or link related records, as described in *Validating Records for Duplicates: To Validate a Lead for Duplicates*.

# Lesson 6: Managing Audience

## Lesson 6.1: Assigning Leads to Owners and Workgroups

### Assigning Leads to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the customer management workload among responsible individuals in the company. You can use assignment maps to indicate to the system how to assign records—such as leads, opportunities, or cases—to individuals or groups of people (that is, to owners or workgroups). This topic provides information about assigning leads to owners and workgroups one by one or through mass processing.

#### Learning Objectives

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

- Assign a lead manually to a particular owner
- In a lead class, specify how the system determines the default owner it assigns to new leads of the class
- Assign a selected group of leads to workgroups by using a lead assignment map

#### Applicable Scenarios

You may want to learn how to assign leads to owners and workgroups in scenarios that include the following:

- You have acquired a new lead and need to assign this lead to a particular individual or a group of people for nurturing.
- You have been requested to work with a lead and need to specify yourself as an owner.

- You have imported to the system a new batch of leads, such as a purchased list, and need to distribute these leads among the employees of the applicable department or group, such as a marketing department.

## Assignment of Leads to Owners in Acumatica ERP

In Acumatica ERP, you can easily base the rules for lead assignment on company policies because leads can be distributed among owners or workgroups in many different ways, based on the settings and attributes of the lead records being distributed. You can distribute leads manually or automatically.

You can manually assign leads individually or in groups. When you create a lead on the *Leads* (CR301000) form or at any later time, you can select an owner in the **Owner** box of the Summary area. You can also manually change the owner of a lead that has been manually or automatically assigned. You can assign groups of leads that do not have owners specified by using the *Assign Leads* (CR503010) mass processing form. On this form, you can assign selected leads or all leads that do not have owners, and the system uses the assignment map specified on the *Customer Management Preferences* (CR101000) form to determine the owners of the leads.

You can cause leads to be automatically assigned to owners by specifying a setting for any lead class that determines how the default owner is assigned to new leads of the class. On the **Details** tab of the *Lead Classes* (CR207000) form for a lead class, based on the option you select in the **Default Owner** box, the system assigns one of the following as the default owner of a new lead of the class:

- The current owner of the lead, if any (*Do Not Change* option)
- The user that created the lead (*Creator* option)
- A user determined by the assignment map you specify (*Assignment Map* option)
- The owner specified for the contact or business account from which the lead was created (*From source entity* option), if you created the lead in this way

If you want the system to distribute leads by using an assignment map, whether to assign the owner of leads of a particular class or to be used for mass-assignment of leads, you must perform two preliminary tasks. You first create a company tree on the *Company Tree* (EP204061) form to be able to assign leads to workgroups, as described in the following section. Then you create the needed maps for the automatic assignment of leads by using the *Assignment Maps* (EP205010) form.

## The Company Tree and Workgroups

Maintaining and using a functional organizational chart in an ERP system can facilitate the assignment of work and approvals for optimal collaboration within teams and smoother workflows.

In Acumatica ERP, a company tree is a hierarchical structure that contains groups of people, their roles, and chains of assignments and approvals. A company tree may include both the company's organizational chart with different levels of management and a hierarchy of groups representing real business relations and functions.

On the *Company Tree* (EP204061) form, you can easily create a hierarchy of groups for approvals or assignments, and include the same people or groups of people in different workgroups. Thus, users can participate in multiple workflows. You can use approvals for cross-department projects, which have a manager and project participants that may belong to different company departments but be members of the same chain of approvals. We recommend using a company tree to speed and streamline your assignments and approvals.

## Distribution of Leads by Using Lead Classes

As noted previously, when you create or modify a lead class on the *Lead Classes* (CR207000) form, you can specify how the system automatically assigns the owner to newly created leads of the class. You do this by selecting the appropriate option in the **Default Owner** box on the **Details** tab (**Data Entry Settings** section). Based on the selected option selected for the lead class, when a lead class has been selected for a lead on the **CRM Info** tab (**CRM** section) of the *Leads* (CR301000) form, the system determines the default owner of this lead and inserts the appropriate employee name in the **Owner** box in the Summary area of the form.

In the **Default Owner** box of the *Lead Classes* form, you select one of the following options for leads of the class:

- *Do Not Change*: If the owner has been specified in the **Owner** box of the *Leads* form for the lead, and you change the lead class in the **Lead Class** box of the **CRM Info** tab, the system does not clear or change the owner for this lead. If no owner has been specified for the lead, the system leaves the **Owner** box blank.
- *Creator*: When a lead of the class is created, the user who created the lead record is assigned as its owner by default.
- *Assignment Map*: When a lead of the class is created, based on the assignment map (which you must also select in the **Assignment Map** box for the class), the system determines the default owner or workgroup (or both) and inserts them on the *Leads* form. The system inserts the workgroup of the lead, if applicable, on the **CRM Info** tab (**CRM** section). If you are distributing leads based on assignment maps, you can use a different assignment map for each lead class, if needed.
- *From Source Entity*: When a lead of the class is created, if it is created from another entity, such as a contact, or business account, the lead inherits the owner and workgroup (if specified) from this contact or business account. This default owner is assigned if you create a lead from a contact on the *Contacts* (CR302000) form or from a business account on the *Business Accounts* (CR303000) form.

We recommend distributing leads by using lead classes because the system can assign a lead to an owner each time a new lead record is created.

## Distribution of Leads by Using Assignment Maps

You can use the assignment map functionality to distribute leads automatically through the use of lead classes or manually when you mass-assign leads.

An assignment map is a set of rules, actions related to rules, and conditions that the system can use for assigning a record or a number of records for processing to a particular individual or a group of people. An assignment map may include any number of rules, which are executed sequentially. Each rule in an assignment map includes conditions and actions to be performed if the conditions are met. You create assignment maps on the *Assignment Maps* (EP205010) form as follows (For detailed instructions on configuring assignment maps, see *Configuring Assignment Maps*.):

1. On the **Rules** tree, you add new rules.
2. On the **Conditions** tab, you add rule conditions that assignment criteria should meet.
3. On the **Rule Actions** tab, you select an owner or a workgroup (or both).

Once a lead assignment map has been created, you can do either of the following:

- Specify the assignment map on the *Lead Classes* (CR207000) form for the lead class if you have selected *Assignment Map* in the **Default Owner** box on the **Details** tab: Each new lead of the class will be assigned to a default owner according to this map. A user can change the owner as needed on the *Leads* (CR301000) form.
- Specify the assignment map on the *Customer Management Preferences* (CR101000) form, in the **Lead Assignment Map** box of the **General Settings** tab (**Assignment Settings** section): Existing leads that do not have owners will be assigned to owners according to this map if you assign the leads by using the *Assign Leads* (CR503010) mass processing form.

> The assignment map specified for the applicable lead class on the *Lead Classes* (CR207000) form overrides the assignment map specified on the *Customer Management Preferences* (CR101000) form. Leads of the class will be assigned to owners according to the assignment map from the lead class.

### Execution Issues Related to a Lead Assignment Map

If an assignment map contains errors (for example, a workgroup contains an employee who has quit the company and cannot be assigned to any records), and you have processed any leads that should be assigned according to this assignment map by using the *Assign Leads* (CR503010) form, the system will list these errors in the **Processing** dialog box. You can view the error by clicking the More button on the **Errors** tile in this dialog box. In the **Message** column, the system displays the text of the error message.

### Notifications About Assigning a Lead to an Owner

In Acumatica ERP, an administrator can set up email notifications on the *Business Events* (SM302050) form so that if you are assigned to a new lead, you receive a notification by email, by SMS, or in Acumatica mobile app. For details, see *Business Events*.

## Assigning Leads to Owners and Workgroups: Process Activity

The following activity demonstrates how to assign leads to owners and workgroups and set up the system to assign leads to owners automatically. The activity will show you how to define a lead class so that leads of the class are assigned to their creators by default. You will also practice manually assigning leads to the appropriate owners, both for an individual lead and by using the mass-processing form to assign multiple users to the needed owners.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a new marketing manager of the SweetLife Fruits & Jams company, and you are performing several tasks related to assigning leads to the appropriate owner. First, you need to modify an existing lead class (the class for confectioneries) so that by default, when a new lead of the class is created, the system assigns the lead's creator as its owner. Also, a new lead, *Stanley Carson*, has been created in the system, and you want to manually assign this lead to you and to your workgroup.

A number of leads whose companies can be classified as stores (including supermarkets) and food service companies (bakeries, cafes, or restaurants) have been imported into the system, and you want to distribute these leads between two workgroups of marketing employees as follows:

- The *Marketing Stores* workgroup will be working with leads that represent supermarkets and other stores.
- The *Marketing Food Services* workgroup, to which your *owen* user account belongs, will be working with leads that represent restaurants, cafes, bakeries, and other food service companies.

The workgroups listed above have been defined in the company tree and an assignment map has been created to assign leads to the needed workgroup; also, you have specified the needed configuration setting to cause the system to use this assignment map when you are mass-assigning leads. You will mass-assign leads by using this assignment map.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Company Tree* (EP204061) form, the company tree has been configured and it includes the *Marketing Stores* and the *Marketing Food Services* workgroups as well as the users in the *Marketing* department.
- On the *Assignment Maps* (EP205010) form, the *Lead Assignment Map* has been created. According to the actions related to rules, which are specified in the assignment map, the leads of the *STORE* class are assigned to the *Marketing Stores* workgroup in the SweetLife *Marketing* department, and the leads of the *BAKERY* and *CAFE* classes are assigned to the *Marketing Food Services* workgroup in the *Marketing* department.
- On the *Customer Management Preferences* (CR101000) form (in the **Lead Assignment Map** box of the **Assignment Settings** section of the **General Settings** tab), the *Lead Assignment Map* assignment map has been specified. The system will use this assignment map during the process of mass-assigning leads.
- On the *Lead Classes* (CR207000) form, the following lead classes have been created: *STORE* (for leads that are supermarkets and other stores), *BAKERY*, *CAFE* (which includes leads that are restaurants and cafes), and *SWEETSHOP* (for leads that are confectioneries).
- A list of lead records that includes bakeries, cafes, restaurants, and supermarkets has been imported to the system through the *Import by Scenario* (SM206036) form.
- On the *Leads* (CR301000) form, the following leads—which have been assigned to, respectively, the *STORE*, *BAKERY*, and *CAFE* lead classes—have been added to the system: *Stanley Carson*, *Douglas Keatinge*, and *Duncan Saunders*.

## Process Overview

In this activity, you will do the following:

1. On the *Lead Classes* (CR207000) form, specify how the system assigns the default owner of leads of a particular class.

2. Manually assign a particular lead to an owner by using the *Leads* (CR301000) form.
3. Assign selected leads to owners by using the *Assign Leads* (CR503010) form.

## System Preparation

Before you start assigning leads to owners, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Specifying a Default Owner for New Leads of a Lead Class

You can modify the settings of a lead class to specify how the system assigns the default owner of a newly created lead of the class—that is, whether the default owner is the creator of the lead, a user determined by an assignment map that you specify (so that specific owners can be assigned), or the owner of the entity (such as a contact) from which the lead is created, if the lead was created in this way.

In this step, you will specify the owner of a new lead of the *SWEETSHOP* class as its creator.

To specify the default owner of an existing lead class and make sure the owner is assigned correctly to a new lead of the class, do the following:

1. Open the Lead Classes (CR2070PL) form.
2. In the **Class ID** column, click the *SWEETSHOP* link to open the lead class record on the *Lead Classes* (CR207000) form.
3. On the **Details** tab (**Data Entry Settings** section), in the **Default Owner** box, select *Creator*.
4. On the form toolbar, click **Save**.
5. Make sure that the option that you have just specified assigns new leads to owners correctly by doing the following:
   a. Open the Leads (CR3010PL) form.
   b. On the table toolbar, click **New Record**. A new lead record opens on the *Leads* (CR301000) form.
   c. On the **Contact Info** tab, in the **Contact** section, specify the following settings:
      - **First Name**: `Sandra`
      - **Last Name**: `Flynn`
      - **Job Title**: `Manager`
      - **Account Name**: `Crystal Sweet`

- **Email**: `s.flynn@crystalsweet.example.com`

d. On the **CRM Info** tab, in the **Lead Class** box, select *SWEETSHOP*.

e. In the **Owner** box of the Summary area, notice that *Bill Owen* is inserted in the box. Because this is the user account to which you are signed in and you were the creator of the lead, the setting of the lead class is assigning the owner appropriately.

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

You have specified how the system determines the default owner for leads of the *SWEETSHOP* lead class and then created a new lead to test the setting. The system has appropriately inserted the default owner for the new lead. Each time a user creates a lead of the *SWEETSHOP* class, the system will insert the employee name of the creator of the lead as the owner of the lead.

## Step 2: Assigning a Lead to an Owner Manually

To assign a lead to an owner manually, do the following:

1. Open the Leads (CR3010PL) form.
2. In the **Display Name** column, click the *Stanley Carson* link to open this lead record on the *Leads* (CR301000) form.

   > To search for a record in a list or records, you can enter a text string in the Search box of the filtering area. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

3. In the **Workgroup** box on the **CRM Info** tab, select the *Marketing Food Services* workgroup.

   > If a workgroup is specified in the **Workgroup** box on the **CRM Info** tab, the list of the employees available for selection as the owner of this lead is limited to those included in the selected workgroup.

4. In the **Owner** box of the Summary area, select *Bill Owen*.
5. On the form toolbar, click **Save**.

You have assigned a lead to yourself and you can start working with this lead.

## Step 3: Assigning Selected Leads to Workgroups

Suppose that the *Douglas Keatinge* and *Duncan Saunders* new leads have been added to the system and you need to assign these leads to owners.

To mass-assign multiple selected leads to owners, do the following:

1. Open the *Assign Leads* (CR503010) form.
2. In the table, click the header of the **Owner** column.

   > If you need to change the order of columns in any table, you can drag a column by its header to the new place in the table.

3. In the Sorting and Filtering Settings dialog box, which opens, do the following to filter unassigned leads:

    a. Select the *Is Empty* filter condition.

    b. Click **OK**. The system closes the dialog box and applies the filter.

4. In the unlabeled column, select the check boxes for the leads with the *Douglas Keatinge* and *Duncan Saunders* links in the **Contact** column.

5. On the form toolbar, click **Process**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning leads according to the lead assignment map specified on the *Customer Management Preferences* (CR101000) form.

> If an assignment map contains errors, the system will list these errors in the **Processing** dialog box. You can view the errors by clicking the More button on the **Errors** tile: In the **Message** column, the system displays the text of each applicable error message.

> In situations when you want to assign all unassigned leads to owners, you would not select unlabeled check boxes in the table; you would instead click the **Process All** button on the form toolbar. Based on the *U100* settings specified for the *Lead Assignment Map* on the *Assignment Maps* (EP205010) form, all leads would be assigned to either the *Marketing Stores* workgroup or *Marketing Food Services* workgroup.

6. Click **Close** to close the dialog box and return to the form. In the **Workgroup** column, for the *Douglas Keatinge* lead, you can see the *Marketing Stores* name of the workgroup, for the *Duncan Saunders* lead, you can see the *Marketing Food Services* name of the workgroup.

You have assigned two leads to workgroups according to the rules specified in the lead assignment map.

# Lesson 6.2: Managing Emails and Activities

In this lesson, you will learn how to create an email and an activity of the *Phone Call* type. For more information about tasks and events, see *Lesson 9.4: Managing Tasks* and *Lesson 10.3: Managing Events*.

## Emails and Activities: General Information

Marketing and sales employees need to communicate with leads to introduce products and services to them, and gather any valuable information that may help in building the relationship between the company and these potential customers. Acumatica ERP provides easy-to-use capabilities for tracking communication with leads.

### Learning Objectives

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

- Create an email and send it to a lead
- Register a phone call by creating an activity of the *Phone Call* type

## Applicable Scenarios

You may need to learn how to communicate with leads in Acumatica ERP in scenarios that include the following:

- You need to confirm a lead's contact information.
- You need to find out a lead's needs and provide the lead with the needed information.
- You need to arrange a meeting with a lead.

## Use of Emails and Activities in Acumatica ERP

In Acumatica ERP, you can track communication with your leads, prospects, and existing customers by using emails and activities. You can associate emails and activities with leads, contacts, business accounts, marketing lists, marketing campaigns, opportunities, and cases. Emails and activities are listed on the **Activities** tab of the following forms, which are or can be related to the customer relationship management (CRM) functional area:

- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Mass Emails* (CR308000)
- *Marketing Lists* (CR204000)
- *Marketing Campaigns* (CR202000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)
- *Employees* (EP203000)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)

By using the buttons on the table toolbar of the **Activities** tab, you can create an email, a task or an event by clicking **Add Task**, **Add Event**, or **Add Email**, respectively; alternatively, you can create activities of various types by clicking one of the actions on the **Add Activity** menu. The email or activity opens in a pop-up window, in which you can specify the needed settings and save this email or activity.

You can hide an activity from the Self-Service Portal users by selecting the **Internal** check box in the Summary area of the *Activity* (CR306010) form or on the **Details** tab of the *Task* (CR306020) and *Event* (CR306030) forms. The hidden activity will be available to only the internal Acumatica ERP users.

## Pinning of Emails and Activities

In Acumatica ERP, you can pin the most important emails and activities—such as tasks, notes, or phone calls—to the top of the activities list so that you can quickly access and keep track of them. Activity pins are supported for cases, opportunities, and leads. That is, on the **Activities** tab of the *Cases* (CR306000), *Opportunities* (CR304000), and *Leads* (CR301000) forms, you can select an activity that should be pinned to the top of the list and click the **Pin/Unpin** button to pin the activity to the top of the list. Once you have pinned an activity, it is moved to the top of the list and the Pin icon is shown in the **Is Pinned** column.

You can also click a pinned activity and click the **Pin/Unpin** button to unpin the activity. If you unpinned an activity from the list, an icon is no longer shown in the **Is Pinned** column, and the activity is moved to the appropriate location based on the sorting settings.

## Tracking of Communication with Leads in Acumatica ERP

Once a lead has been created in the system, you can create and track various activities related to this lead, including emails, phone calls, tasks, and events. (Depending on the lead processing workflow in your company, you may be the owner of the lead, but this is not required.) For each lead, you can create new activities, cancel or complete activities, and attach files or notes to activities. You can manage all activities associated with a lead on the **Activities** tab of the *Leads* (CR301000) form.

For details, see *Emails and Activities: Emails* and *Emails and Activities: Activities*.

## The Activities Tab

By using the **Activities** tabs on the *Leads* (CR301000), *Contacts* (CR302000), *Business Accounts* (CR303000), *Opportunities* (CR304000), *Cases* (CR306000), *Marketing Lists* (CR204000), and *Marketing Campaigns* (CR202000) forms, you can create activities and associate them with the particular entity. The *Projects* (PM301000) and *Project Tasks* (PM302000) forms also include an **Activities** tab on which you can view only activities associated with the project or task, respectively.

All activities (including current, completed, and not-yet-started ones) related to the selected entity—that is, the lead, contact, business account, opportunity, case, marketing list, marketing campaign, project, or project task you are viewing—are listed on the **Activities** tab. You can view the details of the task, event, or activity by clicking the value in the **Subject** box, which is a link to the corresponding task, event, or activity.

The list of activities or tasks is presented in a tabular format. The column with the unlabeled header contains icons that indicate the type of the activity in each row. The following icons are used:

- is used for the *Phone Call* activity type.
- is used for the *Email* activity type.
- is used for the *Task* activity type.
- is used for the *Event* activity type.
- is used for the *Chat* activity type.
- Custom icons for activities of other types can be used if they are defined on the *Activity Types* (CR102000) form.

The table has a number of columns with icons as column headings.

You can use the icons in the table rows in the following ways:

- To attach a file to an activity, click the Attach File icon ( ) in the row related to the activity, and the **Upload File** dialog box opens. (For detailed instructions on using this dialog box, see *To Attach a File to a Record Detail*.) Once you have attached a file, the File Attached icon ( ) is instead displayed.
- To add a note to the activity, click the Attach Note icon ( ) in the row related to the activity. The **Enter Record Note** dialog box opens; for instructions on how to use this dialog box, see *To Attach a Note to a Record Detail*. Once you have attached a note, the Note Attached ( ) icon is instead shown in the row. To read the note, click the icon.
- In the column with the Check Mark icon ( ) in the column header, note the green check mark if it appears. This check mark indicates that the related activity has been completed.
- Notice the column with the Exclamation Mark icon ( ) in the column header. The icon in this row indicates the priority of the activity:
  - If the exclamation mark ( ) appears, the priority level is high.
  - If the blue arrow ( ) is displayed, the priority level is low.
  - If the column is empty, the priority level is normal.
- Note the column with the Reminder icon ( ) in the column header, which indicates whether a reminder has been configured for the activity. If this column is empty for a particular row, a reminder was not set for the activity. If a white bell ( ) is displayed in this column, a reminder has been configured for the activity.

## Emails and Activities: Emails

In Acumatica ERP, you can create emails directly from the forms you use to create entities related to customer relationship management (CRM), such as leads, contacts, business accounts, marketing lists, marketing campaigns, opportunities, sales quotes, projects, project tasks, project quotes, cases, and employees. While viewing any of these entities on its data entry form, you can create a task associated with it and track all emails (and other activities) related to the entity.

### Creation and Tracking of Emails for an Entity

In Acumatica ERP, you can create an email associated with an entity by clicking the **Add Email** button on the table toolbar of the **Activities** tab of any of the following forms:

- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Mass Emails* (CR308000)
- *Marketing Lists* (CR204000)
- *Marketing Campaigns* (CR202000)

- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)
- *Employees* (EP203000)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)

When you click the **Add Email** button, the *Email Activity* (CR306015) form opens in a pop-up window, and you can create an email and either send the email to the recipient or save the email without sending it (for example, if you need to review and modify the email and send it later).

When you send an email, the system returns you to the form you added the activity from and adds a row with the *Email* type to the **Activities** tab of the form. The email is generated by the system and added to the outgoing mail; if a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed.

On the **Activities** tab, you can open this email (or any email) by clicking the link in the **Summary** column of the appropriate row, which opens the email on the *Email Activity* form in a pop-up window. (Similarly, you can click the link in this column of any row to view the details of the listed activity on the form used to create it, which varies depending on the activity type.)

### Copying of Lead-Related Emails to Related Entities

If you have created emails to communicate with a lead and then you create a contact or business account for the lead or convert the lead to an opportunity, the system copies all the emails (and other activities) listed on the **Activities** tab of the *Leads* form to the same tab of the *Contacts* (CR302000), *Business Accounts* (CR303000), or *Opportunities* (CR304000) form, respectively. Thus, the system preserves the history of emails and other activities created for the lead and copies this history to the entities associated with the lead.

> Emails that you create on the *Contacts*, *Business Accounts*, and *Opportunities* forms are associated with only the entity (contact, business account, or opportunity) for which they have been created.

## Emails and Activities: Activities

In Acumatica ERP, you can create miscellaneous activities—such as notes, chats, appointments, escalations, messages, phone calls, and work items—directly from the forms you use to create entities related to customer relationship management (CRM). These entities include leads, contacts, business accounts, marketing lists, marketing campaigns, opportunities, sales quotes, projects, project tasks, project quotes, cases, and employees. While viewing any of these entities on its data entry form, you can create an activity associated with it and track all activities related to the entity.

> This topic is focused on the miscellaneous activities (listed above) that can be created for entities. For details on creating activities that are emails, tasks, or events, see *Emails and Activities: Emails*, *Emails and Activities: Tasks*, and *Emails and Activities: Events*, respectively.

## Creation and Tracking of Activities for an Entity

You can create an activity associated with an entity by clicking the needed action on the **Add Activity** menu on the table toolbar of **Activities** tab of any of the following forms:

- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Mass Emails* (CR308000)
- *Marketing Lists* (CR204000)
- *Marketing Campaigns* (CR202000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)
- *Employees* (EP203000)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)

When you click the action, the *Activity* (CR306010) form opens in a pop-up window, where you can specify the needed details. When you save the activity, the system returns you to the form you added the activity from and adds a row with the *Activity* type to the **Activities** tab of the form.

On the **Activities** tab, you can view the details of this activity (or any listed activity) by clicking the link in the **Summary** column of the appropriate row, which opens the activity on the form used to create it (which varies depending on the activity type) in a pop-up window.

## Copying of Lead-Related Activities to Related Entities

If you have created activities to keep track of all communication that is related to a particular lead, and then you create a contact or business account for the lead or convert the lead to an opportunity, the system copies all the activities listed on the **Activities** tab of the *Leads* form to the same tab of the *Contacts* (CR302000), *Business Accounts* (CR303000), or *Opportunities* (CR304000) form, respectively. Thus, the system preserves the history of activities created for the lead in the associated entities and copies this history to the entities associated with the lead.

> Activities that you create on the *Contacts*, *Business Accounts*, and *Opportunities* forms are associated with only the entity (contact, business account, or opportunity) for which they have been created.

If based on your work processes you need to create your own set of activity types, you can add, view, edit, and delete types of activities on the *Activity Types* (CR102000) form.

## Emails and Activities: Time Reporting

Acumatica ERP gives you the ability to track your working time as you perform your work tasks.

### Time Reporting

You can report time spent on activities, tasks, events, and emails if the *Time Reporting on Activity* feature (*Monitoring & Automation* group of features) is enabled on the *Enable/Disable Features* (CS100000) form, which makes the **Track Time** check box available on the *Activity* (CR306010) form. When a user selects this check box, multiple elements appear on the *Activity* form, which you can use to report the total time spent on the activity. You can also select the **Billable** check box to indicate that the activity is billable and specify the information required for billing—that is, the duration of billable time and the earning type of the activity; the earning type determines how the system calculates the cost of employee labor. For details, see *Reporting Time*.

## Emails and Activities: To Create an Email

The following activity will demonstrate how to create an email.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have obtained contact information for Donna Coleman, a buyer at Yummy Supplies supermarket and registered the *Donna Coleman* lead in the system. You need to email to Donna the company's special offer on fruits.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, the *Donna Coleman* lead has been added to the system.
- On the *System Email Accounts* (SM204002) form, the *marketing@sweetlife.com* system email account has been configured.

### Process Overview

In this activity, you will create an email on the **Activities** tab of the *Leads* (CR301000) form.

### System Preparation

Before you start creating an email, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step: Creating an Email

To create an email to be sent to the *Donna Coleman* lead, do the following:

1. In the **Display Name** column on the Leads (CR3010PL) form, click the *Donna Coleman* link.

   > To search for a record in a list or records, you can enter a text string in the Search box of the filtering area. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

2. On the *Leads* (CR301000) form, which opens, open the **Activities** tab.
3. On the table toolbar, click **Add Email**. The *Email Activity* (CR306015) form opens in a pop-up window. Notice that the lead's name is specified in the **To** box.
4. In the **From** box, select the *marketing@sweetlife.com*.
5. In the **Subject** box, specify: `New Fruits in Season!`.
6. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

   `Dear Donna,`

   `We are happy to offer seasonal fruits at special prices! Here are our active discount codes:`

   - `SWEETAPPLE for 20% off 1 lb of fresh apples`
   - `FRESHORANGE for 15% off 1 lb of fresh oranges`
   - `WHITEGUAVA for 25% off 1 lb of fresh guavas`
   - `FIREDRAGON for 5% off 1 lb of fresh dragon fruits`

   `Our offer is available until the end of the month.`

7. On the form toolbar, click **Save**.
8. Click **Send**. The system closes the *Email Activity* (CR306015) form and returns you to the *Leads* form. Notice that a row with the *Email* type is added to the table on the **Activities** tab of the *Leads* form for the lead.

As a result, the email is generated by the system and added to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed.

> If the outgoing mail queue is too long, it may take time for the system to process and send all outgoing mail at once.

## Emails and Activities: To Track a Phone Call

The following activity will demonstrate how to create an activity of the *Phone Call* type.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company.
You are currently working on a purchased list of cold leads (individuals or organizations who never contacted your organization or expressed any interest in your products or services), which includes the *Tim Bonner* lead. You need to call Tim Bonner, who is a procurement manager at Store Spark in New York, make sure that the lead represents an actual person at the company. You then need to track the results of the phone call in the system.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, the *Tim Bonner* lead has been added to the system.

### Process Overview

In this activity, you will create an activity of the *Phone Call* type on the **Activities** tab of the *Leads* (CR301000) form.

### System Preparation

Before you start creating an activity, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
    - Username: *owen*
    - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

### Step: Creating an Activity

To create an activity of the *Phone Call* type related to the *Tim Bonner* lead, do the following:

1. In the **Display Name** column on the Leads (CR3010PL) form, click the *Tim Bonner* link.

   > To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

2. On the *Leads* (CR301000) form, which opens, open the **Activities** tab.
3. On the table toolbar, click **Add Activity > Add Phone Call**. The *Activity* (CR306010) form opens in a pop-up window.
4. In the **Summary** box, type a brief description of the activity: `A call to Tim Bonner`.
5. Optional: If you want the activity to be hidden from external users, select the **Internal** check box.
6. In the **Date** box, specify the current date.
7. Optional: In the text editor area, type your comments or any other information related to the phone call, for example: `Tim Bonner responded to the call and confirmed his interest in buying fruits and jams in the future.`
8. On the form toolbar, click Save and Close.

You have added the results of the phone call to the system; notice that a row with the *Phone Call* type is added to the table on the **Activities** tab of the *Leads* form for the lead.

# Lesson 6.3: Managing Marketing Lists

## Marketing Lists: General Information

When your company is nurturing particular leads and contacts, you may want to send newsletters and promotional emails to lists of these contacts. This could be useful for leads with confirmed contact information; you may also want to use marketing lists to communicate with confirmed contacts that are not yet ready to buy any of the currently offered services or products but might be interested in future offers.

### Learning Objectives

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

- Create a static marketing list, which must be created and changed manually, and add members to this list
- Unsubscribe a member from the marketing list
- Create a dynamic marketing list, which can be automatically formed and updated based on rules that you specify

### Applicable Scenarios

You may want to learn how to manage marketing lists in scenarios that include the following:

- You have a list of leads with confirmed contact information and need to regularly promote or showcase the products or services your organization offers.
- You are ready to launch a marketing campaign and need to create a list with the select target audience to receive campaign materials.
- You need to reengage old contacts.
- You want to receive feedback from contacts on products or services that may be interesting to them.

## Marketing Lists in Acumatica ERP

A marketing list in Acumatica ERP is a list of created leads, contacts, business accounts, or employees. You can create as many marketing lists as you need. Based on a marketing list, you can create mailing lists for mass-mailing newsletters, special offers, or other information that is periodically sent to the leads or contacts.

Managing marketing lists in Acumatica ERP includes the following tasks:

- Creating a static marketing list
- Adding members to the marketing list manually
- Adding members to the marketing list by using an inquiry
- Uploading records from a Microsoft Excel file to be added as members of a marketing list
- Unsubscribing particular members from the marketing list

You can view and edit existing marketing lists and create new ones by using the *Marketing Lists* (CR204000) form. On the **List Members** tab of this form, you can view or modify the members of a particular marketing list.

Each marketing list in Acumatica ERP can be configured to be either dynamic or static, as described in the following sections.

## Static Marketing Lists

A static marketing list is formed and updated manually, if needed, on the *Marketing Lists* (CR204000) form. For a static marketing list, the **Dynamic List** check box is cleared on the **Configuration Options** tab. You include particular leads or contacts in a static marketing list by doing any of the following on the form:

- On the **List Members** tab, clicking **Add Row** on the table toolbar and then adding the needed contact or lead in the row. This step can be repeated as needed.
- Using the **Add Members** dialog box, which opens if you click **Add New Members** on the toolbar of the **List Members** tab. In this dialog box, you can select list members from a specific data source, which can be either a different marketing list or a generic inquiry form that lists contact records. You can select a shared filter that is available for the specified inquiry form to be able to select members from only relevant records.
- Clicking **Load Records from File** on the **List Members** tab to upload a Microsoft Excel or a CSV file with a list of contacts.

Also, while you are viewing a particular lead, contact, or business account on the *Leads* (CR301000), *Contacts* (CR302000), or *Business Accounts* (CR303000) form, respectively, you can add this entity to an existing marketing list. To do this, on the **Marketing Lists** tab of the form (which displays the lists the lead, contact, or business account belongs to), you click **Add Row** on the table toolbar and then you select the marketing list by its identifier in the row. You can repeat this step as needed to add the entity to multiple marketing lists.

### Dynamic Marketing Lists

A dynamic marketing list is formed automatically according to a set of rules. To make a marketing list dynamic, you need to select the **Dynamic List** check box on the **Configuration Options** tab of the *Marketing Lists* (CR204000) form. To define the rules according to which the list will be automatically formed and updated, you do one of the following on the same tab:

- Leave the **Generic Inquiry** box empty, and on the **Selection Criteria** tab, specify the necessary filter conditions to select list members from all leads, contacts, and employees defined in the system.
- In the **Generic Inquiry** box, specify a generic inquiry form that lists contact records; then in the **Shared Filter to Apply** box, you can select a shared filter that is available for the specified inquiry form. For details, see *Managing Generic Inquiries*.

The rules will be applied to the existing or newly added records, and the records that match the specified criteria will be automatically included in the list.

Although dynamic marketing lists are not generally modified manually, you can add a particular lead, contact, or business account to a marketing list while you are viewing the entity on the *Leads* (CR301000), *Contacts* (CR302000), or *Business Accounts* (CR303000) form. To do this, on the **Marketing Lists** tab of the form (which displays all of the lists the lead, contact, or business account belongs to), you click **Add Row** on the table toolbar and then you select the marketing list by its identifier in the row. You can repeat this step as needed to add the entity to multiple marketing lists.

### Postponing of a Member Subscription

On some occasions, you might need to temporarily unsubscribe a particular lead or contact from a marketing list. If this is the case, you do not have to remove the record from the list of members; instead, you can do either of the following:

- Clear the check box in the **Subscribed** column for the particular lead or contact on the **List Members** tab of the *Marketing Lists* (CR204000) form populated with the details of this lead or contact.
- Clear the check box in the **Subscribed** column for the particular marketing list on the **Marketing Lists** tab of the *Leads* (CR301000), *Contacts* (CR302000), or *Business Accounts* (CR303000) form while you are viewing the particular lead, contact, or business account.

To renew the member’s subscription, you select the previously cleared check box.

## Marketing Lists: To Create a Static Marketing List

The following activity demonstrates how to create static marketing lists.

The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You need to create a new marketing list that includes leads from bakeries and restaurants with confirmed contact information. These leads will receive a special offer from the company with 30 percent off the price of citrus juicers.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, leads (which can be added to a marketing list) of the *CAFE* and *BAKERY* classes with the following lead IDs have been added to the system:
    - *Leslie Walker*
    - *Leonard Hemmings*
    - *Paul Mitchell*
    - *Nicholas Langdon*
    - *Jacob Murray*

## Process Overview

In this activity, on the *Marketing Lists* (CR204000) form, you will do the following:

1. Create a static marketing list
2. Add members to the static marketing list manually
3. Add members to the marketing list by using an inquiry
4. For a member of the marketing list, cancel the subscription

## System Preparation

Before you start creating marketing lists, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
    - Username: *owen*
    - Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Creating a Static Marketing List

To create a static marketing list, do the following:

1. On the toolbar of the Marketing Lists (CR2040PL) form, click **New Record**. The *Marketing Lists* (CR204000) form opens.
2. In the Summary area, specify the following settings:
    - **Marketing List ID**: `JCR30OFF`
    - **List Name**: `Citrus Juicers at a 30% Discount`
    - **Active**: Selected
3. On the **Configuration Options** tab, make sure that the **Dynamic List** check box is cleared.
4. On the form toolbar, click **Save**.

You have created a static marketing list, and now you can add members to this list. You can now add and remove list members, or unsubscribe them from the marketing emails according to your needs or preferences, as described in the following steps.

## Step 2: Adding Individual Members to a Static Marketing List

To manually add two members, Leslie Walker and Leonard Hemmings, to the static marketing list you created, do the following:

1. While you are still viewing the *Citrus Juicers at a 30% Discount* marketing list on the *Marketing Lists* (CR204000) form, open the **List Members** tab.
2. Add members to the static marketing list as follows:
    a. Click **Add Row**.
    b. In the **Name** column, select *Leslie Walker*. The system adds a row with the lead's data to the table.
    c. On the form toolbar, click **Save**.
    d. Repeat the previous three instructions to add one more member to the marketing list: *Leonard Hemmings*.

You have added two members to the marketing list manually.

## Step 3. Adding Multiple Members to a Static Marketing List By Using an Inquiry

To add multiple members to the marketing list by using a generic inquiry, do the following:

1. While you are still viewing the *Citrus Juicers at a 30% Discount* list on the **List Members** tab the *Marketing Lists* (CR204000) form, click **Add New Members** on the table toolbar.
2. In the **Add Members** dialog box, which opens, select multiple members by doing the following:

a. In the **Data Source** box, select *Inquiry*.

b. In the **Generic Inquiry** box, select a predefined generic inquiry *BI-Leads*. The table becomes populated with the list of leads that have been added to the system.

> - If you want to select members of the marketing list among contacts, in the **Generic Inquiry** box, select *CR-Contacts*, and in the **Type** column, apply a filter to show contact records.
> - In this dialog box, you can select any shared filter that is available for the specified inquiry form to be able to select members from only the relevant records. For details on shared filters, see *Managing Advanced Filters*. You can also select members from a different marketing list.

c. In the unlabeled column of the table, select the check boxes for the *Paul Mitchell*, *Nicholas Langdon*, and *Jacob Murray* leads.

d. In the bottom right of the dialog box, click **Add**. The system closes the dialog box, adds the leads to the marketing list, and saves the changes on the form.

You have added multiple members to the marketing list by using an inquiry.

### Step 4: Temporary Canceling a Member's Subscription from the Marketing List

Suppose that you need to temporarily cancel the subscription for the lead *Paul Mitchell* because you have learned he will be on vacation.

To cancel the subscription for this member of a marketing list, do the following:

1. While you are still viewing the *Citrus Juicers at a 30% Discount* list on the *Marketing Lists* (CR204000) form, make sure that the **List Members** tab is open.
2. In the **Subscribed** column, for the *Paul Mitchell* lead, clear the check box.
3. On the form toolbar, click **Save**.

You have temporarily canceled the subscription for the *Paul Mitchell* lead without removing the lead from the marketing list.

## Marketing Lists: To Create a Dynamic Marketing List

The following activity demonstrates how to create dynamic marketing lists.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You need to create the following marketing lists:

- A marketing list that includes all created leads with confirmed contact information that will regularly receive a company newsletter
- A marketing list with all the leads that have been assigned to you as an owner

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Scheduled Processing* in the *Monitoring & Automation* group of features: This feature gives you the ability to create schedules for the automatic processing of documents.
- The following leads, which have Bill Owen assigned as their owner, have been added to the system on the *Leads* (CR301000) form: *Dorothy Thomson*, *Kylie McLean*, *Mike Erickson*, and *Matt Morrison*.

### Process Overview

In this activity, you will create two dynamic marketing lists on the *Marketing Lists* (CR204000) form.

### System Preparation

Before you start creating dynamic marketing lists, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

### Step 1: Creating a Dynamic Marketing List by Using a Generic Inquiry

To create a dynamic marketing list, do the following:

1. On the toolbar of the Marketing Lists (CR2040PL) form, click **New Record**. The *Marketing Lists* (CR204000) form opens.
2. In the Summary area, specify the following settings:
   - **Marketing List ID**: `NEWS`
   - **List Name**: `SweetLife News`
   - **Active**: Selected
3. On the **Configuration Options** tab, select the **Dynamic List** check box.
4. Specify the selection rules for list members by using a generic inquiry as follows:

a. In the **Generic Inquiry** box, select *BI-Leads*.

b. In the **Shared Filter to Apply** box, select the *Leads Ready for Sales* shared filter that is available for the specified inquiry form. This filter contains leads that have the *Open* status.

   On the **List Members** tab, the table becomes populated with the data of the leads added to the marketing list.

   You can unsubscribe a list member from the list by clearing the check box in the unlabeled column for this member.

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

You have created a dynamic marketing list that includes all leads that have the *Open* status. These leads can receive the SweetLife newsletter when it is sent.

## Step 2: Creating a Dynamic Marketing List by Using a Filter

To create a dynamic list by using a filter, do the following:

1. On the toolbar of the Marketing Lists (CR2040PL) form, click **New Record**. The *Marketing Lists* (CR204000) form opens.
2. In the Summary area, specify the following settings:
   - **Marketing List ID**: `MYLEADS`
   - **List Name**: `My Leads`
   - **Active**: Selected
3. On the **Configuration Options** tab, select the **Dynamic List** check box.
4. Notice that the **Selection Criteria** tab is displayed on the form; open this tab.
5. Select all leads that have been assigned to Bill Owen as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Property** box, select *Owner*.
   c. In the **Condition** box, select *Equals*.
   d. In the **Value** box, select *Bill Owen*.
   e. In the **Operator** box, select *And*.
   f. On the table toolbar, click **Add Row**.
   g. In the **Property** box, select *Type*.
   h. In the **Condition** box, select *Equals*.
   j. In the **Value** box, select *Lead*.
6. On the form toolbar, click **Save**.

You have created a dynamic marketing list that includes all leads assigned to *Bill Owen*. These leads, which the system has added to the **List Members** tab, are active members of the marketing list.

# Lesson 6.4: Managing Mass Emails Related to a Marketing List

In this lesson, you will learn how to send a mass email to the members of a marketing list. For more information about mass emails, see *Lesson 7.2: Managing Mass Emails Related to a Marketing Campaign* and the *Mass Emails: General Information* Help topic.

### Mass Emails

In Acumatica ERP, you can create a mass email and send it to the intended audience— such as members of a marketing campaign, marketing list members, selected contacts, or mailing list members—by using the *Mass Emails* (CR308000) form. You can set up a mass email to be sent to all members of a particular marketing campaign or to only those members who have not previously been sent emails as part of the campaign.

To personalize emails, you can insert the recipient’s data into the text of the email by using placeholders. For details, see *Notification Templates*.

Before sending a mass email, you can test the mass email by sending a preview email to one of your email accounts. For details, see *Mass Emails: To Create and Send a Mass Email*.

## Mass Emails: To Email from a Marketing List

The following activity demonstrates how to send a mass email to the members of a marketing list.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You need to send emails to leads with confirmed contact information that represent employees from bakeries and restaurants with a special offer from the company to buy its citrus juicers at a 20 percent discount.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, a list of leads has been created in the system.

- On the *Marketing Lists* (CR204000) form, the *JCR20OFF* marketing list has been created, and the *Jacob Murray*, *Leslie Walker*, *Nicholas Langdon*, *Paul Mitchell*, and *Leonard Hemmings* leads have been added to the marketing list.
- The system email account *marketing@sweetlife.com* has been added on the *System Email Accounts* (SM204002) form.
- A schedule for periodic runs of the *Send and Receive Email* process has been created on the *Automation Schedules* (SM205020) form.

## Process Overview

In this activity, you will do the following on the *Mass Emails* (CR308000) form:

1. Prepare a mass email to be sent to the members of a marketing list.
2. Send the mass email to the test mailbox to make sure that the email will be delivered to the recipients.

## System Preparation

Before you start sending mass emails to the members of a marketing list, do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Preparing a Mass Email to Be Sent to the Members of the Marketing List

To prepare a mass email to be sent to the members of the *JCR20OFF* marketing list, do the following:

1. Open the Mass Emails (CR3080PL) form on the **All Records** tab.
2. In the table, open the mass email *Citrus Juicers 20% Off*.
3. On the **Summary** tab of the *Mass Emails* form, which opens, specify the mass email settings as follows:
   a. In the **Source** box, select *Marketing Lists*.
   b. In the **Planned** box, specify the date when you plan to send this email, such as the current date.
   c. In the text editor area, type the text of the message.
4. On the **Marketing List** tab, in the table, select the unlabeled check box for the *JCR20OFF* marketing list. The members of this list will be added to the addressees of the mass email.
5. On the form toolbar, click **Save**.

You have prepared the mass email to be sent to the members of the *JCR20OFF* marketing list. Now you can test sending the email to make sure it will be delivered to the recipients.

### Step 2: Sending a Mass Email to a Test Mailbox

To send a mass email to a test mailbox, do the following:

1. While you are still viewing the mass email on the *Mass Emails* (CR308000) form, on the form toolbar, click **Test Message**.
2. In the **Preview Message** dialog box, which opens, specify the test email address that the system will send a message to as follows:
    a. In the **From** box, select *marketing@sweetlife.com*.
    b. Click **OK** to close the dialog box.
3. Open the **Messages** tab. In the table, the system has added the row that has the settings of the test massage. In the **Mail Status** box, notice the *Pending Processing* status of the message. As soon as the test email has been delivered to the test mailbox, the system changes the status to *Processed*.

> If a test email account has been configured as described in *Configuring Email Accounts*, and the test message has been successfully delivered to your test mailbox, you can click **Send** on the form toolbar to send the mass emails to the members of the marketing list.

# Lesson 7: Managing Marketing Campaigns

## Lesson 7.1: Managing Marketing Campaigns

### Marketing Campaigns: General Information

A marketing campaign is a specific set of marketing activities aimed to achieve a particular marketing goal, such as promoting products and services, stimulating demand, boosting brand recognition, or generating revenue. Acumatica ERP provides you with tools that help you track campaign preparation and analyze the results of campaign execution.

### Learning Objectives

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

- Create a marketing campaign
- Move the marketing campaign through stages
- Track expenses related to the marketing campaign through integration with project accounting
- View marketing campaign statistics

## Applicable Scenarios

You may want to learn how to manage a marketing campaign in scenarios that include the following:

- You need to analyze and evaluate the results of a marketing campaign.
- You need to launch a small email marketing campaign.

## Marketing Campaigns in Acumatica ERP

In Acumatica ERP you can track the leads, opportunities, revenue, and expenses associated with a marketing campaign; thus, you can analyze the results and evaluate the efficiency of this marketing campaign.

When you acquire new leads and then create them on the *Leads* (CR301000) form or import them into the system, you can select a marketing campaign as the source of the lead. You can send emails to generate interest among the existing leads and track these emails and activities related to nurturing the leads during the campaign. If a lead is converted to an opportunity and the opportunity has been won or lost, you will be able to track and evaluate the revenue of this marketing campaign. You can link a marketing campaign with a project and track expenses related to the marketing campaign. For details, see the following sections.

## Preparation of a Marketing Campaign

In Acumatica ERP, you can create a new marketing campaign (such as an email campaign) or start tracking the progress of a campaign (such as a billboard advertisement campaign) that has already been launched. The data that you enter when you create a campaign can be used in reports.

Before you start tracking the progress of a marketing campaign, you should do the following preparatory work:

- On the *Campaign Classes* (CR202500) form, define campaign classes to set up the types of campaigns your company uses; each campaign class may have a list of attributes that can be used for detailed reporting.
- Prepare a list of campaign members: You can select campaign members among leads, contacts, business accounts, and customers; also, you can select campaign members from any other entity that has contact information (for example, by creating a generic inquiry that collects contacts from invoices).
- On the *Marketing Campaigns* (CR202000) form, create a campaign and specify the necessary settings, such as the planned budget and the return on investment you expect to receive as a result of the campaign. This information may be useful when you analyze campaign results.

As a marketing campaign proceeds, on the *Marketing Campaigns* (CR202000) form, you can select any of the following stages, which can be used in reports:

- *Planning*: You are preparing the marketing campaign.
- *Execution*: You have started sending emails to the campaign members and creating activities related to the campaign.
- *Completed*: The marketing campaign is over, and it is time to analyze the results of the marketing campaign.
- *Canceled*: You have canceled a new or ongoing marketing campaign before its completion.

## Tracking of Emails and Activities Associated with a Marketing Campaign

In Acumatica ERP, you can keep track of emails and activities related to a marketing campaign as follows:

- Associate various activities with the campaign, as described in *Managing Emails and Activities*
- Associate generated or existing leads with the campaign by selecting the marketing campaign as the source of the lead in the **Source Campaign** box of the Summary area on the *Leads* (CR301000) form
- Send individual emails to the campaign members, as described in *Managing Emails and Activities*
- Send mass emails to the campaign members, as described in *Managing Mass Emails*

## Marketing Campaign Statistics

In Acumatica ERP, you can view the following marketing campaign statistics on the *Marketing Campaigns* (CR202000) form:

- On the **Campaign Details** tab, the following values, which cannot be edited but may help you evaluate the effectiveness of an ongoing campaign:
  - **Total Members**: The total number of members assigned to the campaign
  - **Members Contacted**: The number of campaign members that have been contacted and have activities associated with them
  - **Members Responded**: The total number of campaign members that have responded to the campaign
  - **Leads Generated**: The number of leads that have been created due to the campaign
  - **Leads Converted**: The number of leads converted to opportunities due to the campaign
  - **Opportunities**: The number of opportunities associated with the campaign
  - **Won Opportunities**: The number of opportunities associated with the campaign that have been eventually won
  - **Opportunities Value**: The total amount of the opportunities associated with the campaign
  - **Won Opportunities Value**: The total amount of the won opportunities associated with the campaign
- On the **Members** tab, the number of opportunities, activities, and emails related to the campaign and associated with a particular campaign member
- On the **Generated Leads** and **Opportunities** tabs, lists of all leads and opportunities that have this marketing campaign specified as their source campaign

You can generate campaign-related reports and use these reports to calculate the revenue affected by a campaign. For more information, see *Marketing Reports: Campaign Metrics*.

## Integration with Project Accounting

In Acumatica ERP, you can use the project accounting functionality to track the expenses and revenue related to a marketing campaign and associate a marketing campaign with projects if the *Project Accounting* feature is enabled on the *Enable/Disable Features* (CS100000) form. The system can treat a marketing campaign as a project and use the project budget tracking mechanism for tracking the campaign budget. For more information about project budgets, see *Managing the Project Budget*.

To be able to track campaign expenses, you need to create a specific project and, optionally, a project task dedicated to expense accounting of a marketing campaign. Also, billing and allocation rules should be configured for the project.

A project can be associated with a marketing campaign through the **Project Accounting Integration** section on the **Campaign Details** tab of the *Marketing Campaigns* (CR202000) form. If needed, multiple campaigns may be associated with a single project.

A previously defined project can also be associated with all the campaign-related activities, the opportunities that resulted from this campaign, and the resulting sales orders and invoices. These associations allow for accurate calculation of all expenses and revenue generated by the campaign.

# Marketing Campaigns: Process Activity

The following activity demonstrates how to create a marketing campaign in the system and change the stages of the marketing campaign.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. SweetLife management has decided to launch a marketing campaign that will promote online master classes focused on teaching the audience how to use juicers that the company sells. You need to create and plan the marketing campaign, and after the campaign has finished, change the stage of the campaign to *Completed* in preparation for analyzing the campaign results.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- The *MSTRCLASS* campaign class has been created on the *Campaign Classes* (CR202500) form.
- The following leads have been created on the *Leads* (CR301000) form: *Jonas Clayton* and *Douglas Keatinge*.

- A number of leads have been created on the *Leads* form and assigned to Bill Owen. The **My Leads** shared filter tab has been created on the Leads (CR3010PL) form; this tab lists only the leads that are assigned to the currently signed-in user.
- The *JCR20OFF* marketing list, which includes a number of leads (*Leslie Walker*, *Leonard Hemmings*, *Paul Mitchell*, *Nicholas Langdon*, and *Jacob Murray*), has been added to the system, as described in *Marketing Lists: To Create a Static Marketing List*.

## Process Overview

In this activity, you will do the following on the *Marketing Campaigns* (CR202000) form:

1. Create a marketing campaign.
2. Change the stage of the marketing campaign.

## System Preparation

Before you start creating a marketing campaign, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Creating a Marketing Campaign

To create a marketing campaign, do the following:

1. Open the Marketing Campaigns (CR2020PL) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area of the *Marketing Campaigns* (CR202000) form, which opens, do the following:
   a. In the **Campaign Class** box, select the *MSTRCLASS* campaign class.
   b. In the **Campaign Name** box, type the name of the campaign: `Juice Master Class`.
   c. In the **Stage** box, select *Planning*.
   d. In the **Owner** box, select *Bill Owen*.
4. On the **Campaign Details** tab, specify the campaign settings as follows:
   a. In the **Start Date** box, specify 1/30/2021.
   b. In the **Workgroup** box, specify `Marketing`.
   c. In the **Expected Response** box, specify `5` (the number of responses to the campaign that you expect).
   d. In the **Planned Budget** box, specify `700`.

e. In the **Expected Return** box, specify `3500`.

f. Optional: In the text editor area, add the following description of the marketing campaign: `A marketing campaign that promotes online master classes focused on teaching the audience how to use juicers.`

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

You have created a marketing campaign. Now you can add members to this campaign.

## Step 2: Adding Individual Members to the Marketing Campaign

To add members to the marketing campaign one by one, do the following:

1. While you are still viewing the *Juice Master Class* campaign on the *Marketing Campaigns* (CR202000) form, open the **Members** tab.
2. On the table toolbar, click **Add Row**.
3. In the **Name** box, select *Jonas Clayton*. The system adds a row with the lead's data to the table.
4. On the form toolbar, click **Save**.
5. Repeat the three previous instructions to add one more member, *Douglas Keatinge*, to the marketing campaign.

You have added two individual members to the marketing campaign one by one.

## Step 3: Adding Multiple Members to the Marketing Campaign by Using a Generic Inquiry

Suppose that you plan to promote online master classes to the leads that have been assigned to you—that is, the leads for which *Bill Owen* is selected in the **Owner** box of the Summary area on the *Leads* (CR301000) form.

To add multiple members to the marketing campaign by using a generic inquiry, do the following:

1. While you are still viewing the *Juice Master Class* campaign on the *Marketing Campaigns* (CR202000) form, open the **Members** tab.
2. On the table toolbar, click **Add New Members**.
3. In the **Add Members** dialog box, which opens, select multiple members as follows:

   a. In the **Data Source** box, select *Inquiry*.

   b. In the **Generic Inquiry** box, select *CR-Leads2018R1*. The table becomes populated with the list of leads that have been added to the system.

   c. In the **Shared Filter to Apply** box, select *My Leads*. The table becomes populated with the list of leads that have been assigned to Bill Owen.

   > In the **Add Members** dialog box, you can select any shared filter that is available for the specified inquiry form to be able to select members from only the relevant records. For details, see *Managing Advanced Filters*. You can also select members from a different marketing list, as described in the following step.

d. In the lower part of the dialog box, click **Add All**. The system closes the dialog box, adds all the leads assigned to Bill Owen to the members of the marketing campaign, and saves the changes to the marketing campaign.

You have added multiple members to the marketing campaign by using an inquiry.

## Step 4: Adding Multiple Members to the Marketing Campaign by Using a Marketing List

Suppose that one more marketing campaign has already been launched: SweetLife offers citrus juicers at a special price to the leads with confirmed contact information to increase sales. These leads have been added to a marketing list, and you need to add members to the marketing campaign from this list.

To add multiple members to the marketing campaign from the marketing list, do the following:

1. Open the Marketing Campaigns (CR2020PL) form.
2. In the **Campaign Name** column, double-click *Citrus Juicers Off Price* to open the campaign on the *Marketing Campaigns* (CR202000) form.
3. On the table toolbar of the **Members** tab, click **Add New Members**. The **Add Members** dialog box opens.
4. In the **Data Source** box, select *Marketing List*.
5. In the **Marketing List** box, select *JCR20OFF*.
6. In the lower part of the dialog box, click **Add All**. The system closes the dialog box, adds the leads from the marketing list to the members of the marketing campaign, and saves the changes to the marketing campaign.

You have added members from the marketing list to the marketing campaign.

## Step 5: Changing the Stage of the Marketing Campaign

Suppose that the *Juice Master Class* campaign has been launched and then completed.

To change the stage of the marketing campaign, do the following:

1. Open the Marketing Campaigns (CR2020PL) form.
2. In the **Campaign Name** column, double-click *Juice Master Class* to open the campaign on the *Marketing Campaigns* (CR202000) form.
3. In the **Stage** box of the Summary area, select *Execution*.
4. Optional: On the **Activities** tab, add activities that are related to launching, executing, and completing the marketing campaign, as described in *Managing Emails and Activities*.
5. In the **Stage** box of the Summary area, select *Completed* to record in the system that the marketing campaign has been completed.
6. On the form toolbar, click **Save**.

# Lesson 7.2: Managing Mass Emails Related to a Marketing Campaign

In this lesson, you will learn how to send a mass email to the members of a marketing campaign. For more information about mass emails, see *Lesson 6.4: Managing Mass Emails Related to a Marketing List* and the *Mass Emails: General Information* Help topic.

## Mass Emails

In Acumatica ERP, you can create a mass email and send it to the intended audience— such as members of a marketing campaign, marketing list members, selected contacts, or mailing list members—by using the *Mass Emails* (CR308000) form. You can set up a mass email to be sent to all members of a particular marketing campaign or to only those members who have not previously been sent emails as part of the campaign.

To personalize emails, you can insert the recipient's data into the text of the email by using placeholders. For details, see *Notification Templates*.

Before sending a mass email, you can test the mass email by sending a preview email to one of your email accounts. For details, see *Mass Emails: To Create and Send a Mass Email*.

# Mass Emails: To Email from a Marketing Campaign

The following activity demonstrates how to send a mass email to the members of a marketing campaign.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have launched a marketing campaign. The campaign will promote online master classes focused on demonstrating how to use citrus juicers that the company sells. You need to send emails to your target audience describing the details of the master classes and a special offer for the attendees.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Scheduled Processing* in the *Monitoring & Automation* group of features: This feature gives you the ability to create schedules for automatic processing.
- A list of leads has been added to the system on the *Leads* (CR301000) form.

- The mass email *SweetLife: SuperJuicer Online Master Class!* has been created on the *Mass Emails* (CR308000) form.
- The *Citrus Online Master Classes* marketing campaign, which includes a number of leads, has been added to the system.
- A system email account has been added on the *System Email Accounts* (SM204002) form.
- A schedule for periodic runs of the *Send and Receive Email* process has been created on the *Automation Schedules* (SM205020) form.

## Process Overview

In this activity, you will do the following on the *Mass Emails* (CR308000) form:

1. Add multiple members to the *Citrus Online Master Classes* marketing campaign. These members will receive your mass email.
2. Prepare the mass email to be sent to the members of the *Citrus Online Master Classes* marketing campaign.
3. Send the mass email to the test email address to make sure that the email will be delivered to the recipients.

## System Preparation

Before you start sending mass emails to the members of a marketing campaign, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Adding Multiple Members to a Marketing Campaign

To add multiple members to the *Citrus Online Master Classes* marketing campaign from a marketing list, do the following:

1. Open the Marketing Campaigns (CR2020PL) form.
2. Locate the row with *Citrus Online Master Classes* in the **Campaign Name** column.
3. In this row, click the link in the **Campaign ID** column. The marketing campaign opens on the *Marketing Campaigns* (CR202000) form.
4. Open the **Members** tab.
5. On the table toolbar, click **Add New Members**.
6. In the **Add Members** dialog box, which opens, select multiple members as follows:

a. In the **Data Source** box, select *Marketing List*.

b. In the **Marketing List** box, select *JCR20OFF*. The table becomes populated with the list of leads that have been added to the marketing list.

c. In the lower part of the dialog box, click **Add All**. The system closes the dialog box, adds the leads to the members of the marketing campaign, and saves the changes to the marketing campaign.

You have added multiple members to the marketing campaign. These members will receive your mass email when you prepare and send it.

## Step 2: Preparing a Mass Email to Be Sent to the Members of the Marketing Campaign

To prepare a mass email to be sent to the members of the marketing campaign, do the following:

1. Open the Mass Emails (CR3080PL) form on the **All Records** tab.

2. In the table, open the mass email *SweetLife: SuperJuicer Online Master Class!*.

> Creating an email on the *Mass Emails* (CR308000) form is described in *Mass Emails: To Create and Send a Mass Email*.

3. On the **Summary** tab of the *Mass Emails* form, which opens, specify the mass email settings as follows:

   a. In the **Source** box, select *Campaigns*.

   b. In the **Planned** box, specify the date when you plan to send this email, such as the current date.

4. On the **Campaigns** tab, in the table, select the unlabeled check box for the *Citrus Online Master Classes* marketing campaign. The members of this campaign will be added to the addressees of the mass email.

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

You have prepared the mass email to be sent. Now you can test sending the email to make sure it will be delivered to the recipients.

## Step 3: Sending a Mass Email to a Test Email Address

To send a mass email to a test email address, do the following:

1. While you are still viewing the mass email on the *Mass Emails* (CR308000) form, on the form toolbar, click **Test Message**.

2. In the **Preview Message** dialog box, which opens, specify the test email address that the system will send a message to as follows:

   a. In the **From** box, select *marketing@sweetlife.com*.

   b. Click **OK** to close the dialog box.

3. Open the **Messages** tab. In the table, the system has added a row that has the settings of the test massage. In the **Mail Status** box, notice the *Pending Processing* status of the message. As soon as the test email has been delivered to the test email address, the system changes the status to *Processed*.

> If a test email account has been configured in the system and the test message has been successfully delivered to your test email address, you can click **Send** on the form toolbar to send the mass emails to the members of the marketing campaign.

# Lesson 8: Qualifying Leads (Marketing)

## Qualifying Leads (Marketing): General Information

Marketing and sales teams rapidly adjust their processes and optimally use collected data, striving for the most effective work approaches. As such, they need their CRM systems to be flexible enough to support adjustments in processes without lengthy, costly development being required. Acumatica ERP provides flexible tools that marketing and sales teams can use to implement and customize workflows in the system without doing the coding.

### Learning Objectives

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

- Use the lead states in Acumatica ERP in your lead qualification workflow
- Qualify a lead and pass the marketing-qualified lead to a sales team for further qualification
- Disqualify a lead
- Reopen a disqualified lead

### Applicable Scenarios

You may want to learn how to qualify leads in Acumatica ERP in scenarios that include the following:

- A lead has contacted you and confirmed the intention to buy the company's products or services and you need to convert the lead to an opportunity.
- A lead has expressed that its organization is not interested in your company's products or services, and you need to disqualify the lead.
- You have a list of cold leads (individuals or organizations who never contacted your organization or expressed any interest in your products or services) and you need to confirm these leads' contact information and gauge their current interest in buying.
- You need to pass a marketing-qualified lead to the sales team for further qualification.

### Lead Qualification Process

Lead qualification is the process of determining a lead to be one of the following:

- A prospect that fits your target customer profile and has a high chance to become a customer

- An existing customer with interest in a product or service that this customer has not already purchased

When marketing personnel communicate with leads (for example, during marketing campaigns) and work on developing the leads' interest in the company's products or services, they establish qualification criteria, which show that some leads are interested to buy more than others. The particular lead qualification criteria vary for different companies and for different products or services. The number of leads that a marketing team passes to a sales team depends on many factors, such as the sales team's requirements for leads or the number of the leads a sales team can handle.

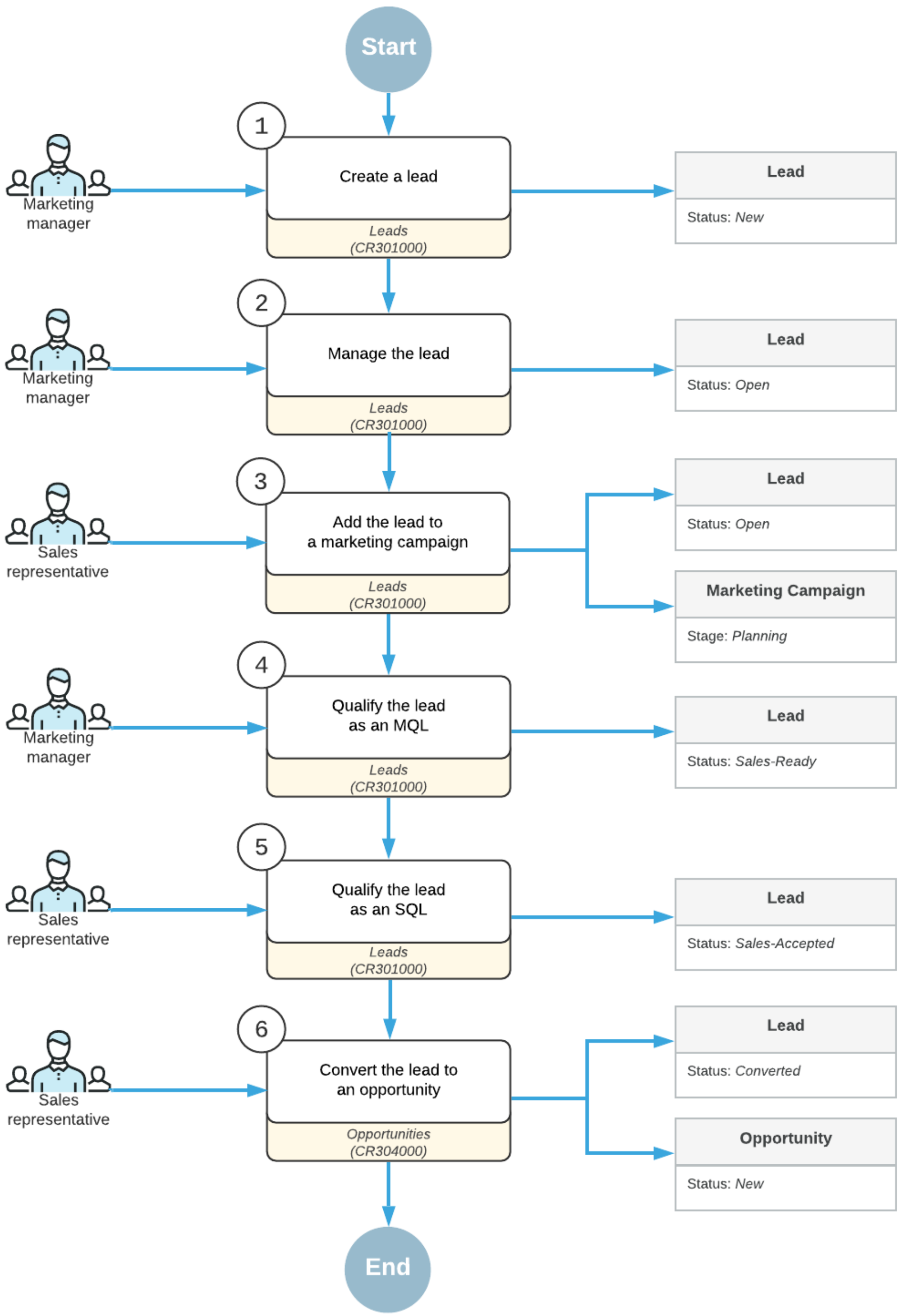
We recommend that marketing and sales teams work together to agree on the criteria of transferring leads from marketing to sales and regularly revise the criteria depending on company sales and other changing conditions. Based on this agreement, in Acumatica ERP, you can create your lead qualification workflow, which consists of stages (identifiable phases, which can be required or optional) in the workflow that relate to particular actions a marketing or a sales employee performs while qualifying each lead. Similarly, the lead proceeds through states—which are represented by statuses in the system—for each stage. The following sections describe this workflow and the ability to implement it in Acumatica ERP.

## Lead Qualification Workflow

CRM functional area in Acumatica ERP includes the lead qualification workflow that helps marketing and sales teams manage leads, add leads to marketing campaigns, qualify leads, associate multiple leads with the same business account and contact, return leads that require further nurturing to marketing and reopen a disqualified lead if needed. You can customize the workflow according to your company's lead qualification processes.

The following diagram illustrates the lead qualification workflow.

## Lead Qualification Workflow



In the lead qualification workflow, transitions between lead states are implemented as actions on the *Leads* (CR301000) form. You can click these actions on the **Actions** menu on the form's toolbar. A lead state is displayed in the **Status** box of the Summary area on the *Leads* form. A system administrator can customize the workflow to define which states correspond to the *Active* (nurtured) state of the lead.

## Lead Qualification as Performed by Marketing in Acumatica ERP

When a lead is created in Acumatica ERP, a marketing team member can review and nurture the lead. The team member can then either disqualify the lead or accept and qualify the lead and pass this marketing-qualified lead (MQL) to a sales team for further qualification (if the MQL is not ready to make a purchase). If the MQL is ready to buy, the marketing team member can convert the lead to an opportunity and skip the stage of lead qualification by sales.

A disqualified lead can be reopened if the lead starts showing interest in the company's products or services. Reopening the lead (rather than creating a new lead) helps you track the lead history and eliminate duplicates in the system.

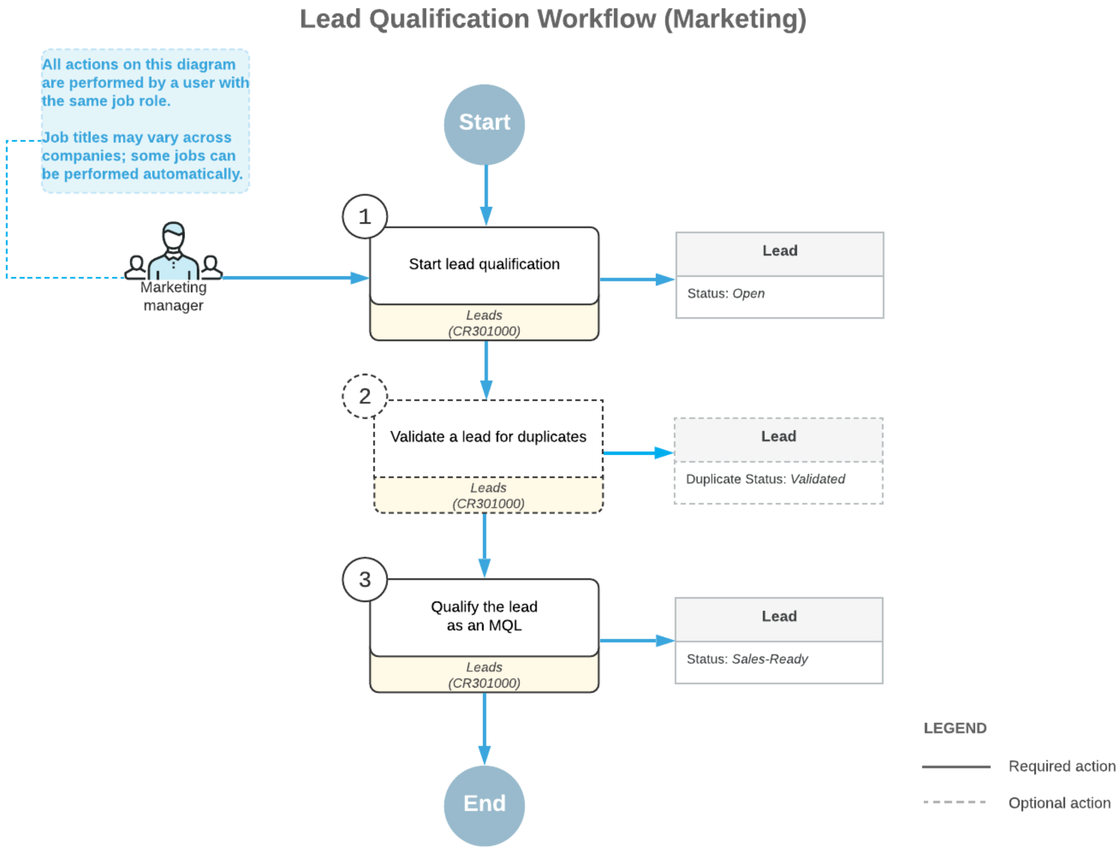
Lead qualification by a marketing team may include the following steps to move the lead through the needed stages:

- Starting the lead qualification process by clicking **Actions > Open** for the lead on the form toolbar of the *Leads* (CR301000) form
- Validating the lead for duplicates, as described in *Validating Records for Duplicates*
- Assigning the lead to an owner, as described in *Assigning Leads to Owners and Workgroups*
- Nurturing the lead, as described in *Managing Emails and Activities*, *Managing Marketing Campaigns*, and *Managing Mass Emails*
- Passing the lead to the sales team by clicking **Actions > Qualify** for the lead on the form toolbar of the *Leads* form
- Disqualifying the lead by clicking **Actions > Disqualify** for the lead on the form toolbar of the *Leads* form
- Reopening a lead that has been disqualified by clicking **Actions > Open** for the lead on the form toolbar of the *Leads* form

> Any of the stages listed above may be skipped as needed, depending on the company's lead qualification processes for marketing.

## Lead Qualification Workflow (Marketing)

The following diagram illustrates the lead qualification workflow as performed by a marketing team.




## Lead Scoring

Lead scoring, that may be part of the lead qualification process, helps you quickly and accurately assign a value to each lead based on various criteria. If you know where exactly leads are in your sales funnel, you can save time on working with leads of poor quality, develop more effective follow-up, and thus increase your return on investment. Calculating the marketing lead score can be done by members of a marketing team or automatically. Marketing teams can automate lead scoring and rating by using marketing automation solutions, such as *HubSpot*, and import marketing-qualified leads to Acumatica ERP.

## Lead Qualification States

As a lead is being processed by marketing and sales teams, it progresses through various states. Each lead state is represented in the system by a status, which is displayed in the **Status** box in the Summary area of the *Leads* (CR301000) form. Lead statuses are updated by the system, and the **Status** box is unavailable for editing. A user can initiate transitions between lead states—which causes the system to update the status accordingly—by performing actions on the *Leads* form.

In Acumatica ERP, a lead can be assigned one of the following statuses:

- *New*: The lead has been created in the system, but no work has been done on it yet.
- *Open*: The lead is being qualified by the marketing team.

- *Sales-Ready*: The lead has been qualified by a marketing team as showing more interest in the organization's products or services than other leads.
- *Sales-Accepted*: The lead has been initially reviewed and accepted by the lead qualification team, and it is willing to communicate more with the sales team for further qualification.
- *Converted:* The lead has been qualified and converted to an opportunity. Once a lead has this status, most of the boxes on the *Leads* form are read-only; you can edit the value in only the **Description** box in the Summary area.
- *Disqualified*: The lead is showing no interest in the organization's products or services, or is not reachable (for example, the contact information is not valid). This status may also be used for leads that are duplicates of more correct or detailed leads. For more information about finding duplicates among CRM records in Acumatica ERP, see *Validating Records for Duplicates*.

If a lead has the *New*, *Open*, *Sales-Ready*, or *Sales-Accepted* status, the **Active** check box on the **CRM Info** tab of the *Leads* form is selected by default to indicate that the lead can be nurtured by a marketing or sales team. The system clears the check box if the lead has the *Converted* or *Disqualified* status.

During lead qualification, some states may not be needed: For example, in a small company, the same team members might work with leads that are both ready for sales and accepted by sales, and thus one state could be used for leads that are turned over to sales, instead of two.

## Processing of a Lead Through States

As you work with a lead on the *Leads* (CR301000) form, you can select any of the following actions on the form toolbar to move a lead through states (which causes the system to change the statuses accordingly):

- **Open**: Opens the **Details** dialog box, where you select the reason for opening the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Open*. This action is available when the status of the lead record is *New*, *Sales-Ready*, *Sales-Accepted*, *Converted*, or *Disqualified*.
- **Qualify**: Opens the **Details** dialog box, where you select the reason for qualifying the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Sales-Ready*. This action is available when the status of the lead record is *New* or *Open*.
- **Accept**: Opens the **Details** dialog box, where you select the reason for accepting the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Sales-Accepted*. This action is available when the status of the lead is *New*, *Open*, or *Sales-Ready*.
- **Disqualify**: Opens the **Details** dialog box, where you select the reason for disqualifying the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Disqualified*. This action is available if the status of the lead record is *New*, *Open*, *Sales-Ready*, or *Sales-Accepted*.
- **Convert to Opportunity**: Opens the **New Opportunity** dialog box, where you can enter the initial data that is required to create an opportunity. By using that dialog box, you can create a new contact and business account for the lead, if needed, or review the basic settings of the existing ones. The action is available if the status of the lead record is *New*, *Open*, *Sales-Ready*, or *Sales-Accepted*.

A system administrator can configure notifications related to lead statuses. For more information, see *Using Business Events*.

# Qualifying Leads (Marketing): To Disqualify a Lead

The following activity demonstrates how to disqualify a lead in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have launched an advertising campaign to promote a new series of commercial juicers. The audience is a group of leads that have shown interest in these juicers. During the campaign, you have sent emails with the product descriptions and a survey to gauge the audience's interest in the products. John Livier, the head of the client services department at the Snow Park Restaurant, responded to your survey that the company is no longer interested in commercial juicers. Thus, you need to disqualify the *John Livier* lead.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled.
- On the *Lead Classes* (CR207000) form, the *CAFE* class, which defines SweetLife's leads representing employees from cafes and restaurants, has been created.
- On the *Leads* (CR301000) form, the *John Livier* lead has been created.

## Process Overview

In this process activity, you will disqualify a lead on the *Leads* (CR301000) form.

## System Preparation

Before you start disqualifying a lead, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in as marketing manager Bill Owen by using the following credentials:
   - Username: *owen*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step: Disqualifying a Lead

To disqualify the *John Livier* lead, do the following:

1. Open the Leads (CR3010PL) form.

2. In the **Display Name** column on the Leads (CR3010PL) form, click the *John Livier* link to open this lead record on the *Leads* (CR301000) form.

> To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

3. On the form toolbar, click **Actions > Disqualify**.

4. In the **Details** dialog box, which opens, select the reason and confirm the action as follows:

    a. In the **Reason** box, select *No Interest*.

    b. Click **OK**.

    The system closes the dialog box and changes the status of the lead to *Disqualified*. Most of the settings in the Summary area and on the **Contact Info**, **CRM Info**, **Attributes**, **Campaigns**, and **Opportunities** tabs have become unavailable for editing.

You have disqualified the lead.

# Part 3: Sales Operations

In Part 3 of this training course, you will learn how to use Acumatica ERP to complete the following basic tasks that are usually performed by a sales team:

- Qualifying leads
- Creating business accounts manually and by using the Acumatica mobile app
- Creating contacts manually and by using the Acumatica mobile app
- Managing leads by using activities, such as a task and an event
- Creating opportunities
- Assigning opportunities to owners and workgroups
- Managing opportunities

For completing activities of the lessons in this part, you will use a company with the *U100* dataset preloaded, which provides a fully configured company with sample data specially designed for this course.

Most of the activities in this part are to be completed under a user account of a sales manager. You can find the credentials to use for sign in to the prepared *U100* tenant in the *System Preparation* section of each activity.

> The activity that describes how to disqualify a lead is presented in both Part 2 Marketing Operations and Part 3 Sales Operations. If you have completed the *Qualifying Leads (Marketing): To Disqualify a Lead* activity, you need not complete the *Qualifying Leads (Sales): To Disqualify a Lead* activity.

The lessons of this part are independent: You can complete activities in any order.

# Lesson 9: Qualifying Leads (Sales)

## Lesson 9.1: Qualifying Leads (Sales)

The activity that describes how to disqualify a lead is presented in both Part 1 Marketing Operations and Part 2 Sales Operations. If you have completed the *Qualifying Leads (Marketing): To Disqualify a Lead* activity, you need not complete the *Qualifying Leads (Sales): To Disqualify a Lead* activity in this part.

### Qualifying Leads (Sales): General Information

Marketing and sales teams rapidly adjust their processes and optimally use collected data, striving for the most effective work approaches. As such, they need their CRM systems to be flexible enough to support adjustments in processes without lengthy, costly development being required. Acumatica ERP provides flexible tools that marketing and sales teams can use to implement and customize workflows in the system without doing the coding.

## Learning Objectives

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

- Use the lead states in Acumatica ERP in your lead qualification workflow
- Convert a lead to an opportunity
- Disqualify a lead
- Return a lead to marketing for further nurturing
- Reopen a disqualified lead

## Applicable Scenarios

You may want to learn how to qualify leads in Acumatica ERP in scenarios that include the following:

- You have obtained a lead from marketing: The marketing team has qualified a lead as a marketing-qualified lead (MQL), and your manager has assigned the lead to you. You need to get in touch with the lead and find out (qualify) if the organization is interested in the product. If so, you need to convert the lead to an opportunity.
- A lead has contacted you and confirmed the intention to buy the company's products or services, and you need to convert the lead to an opportunity.
- A lead has expressed that its organization is not interested in your company's products or services, and you need to disqualify the lead.
- You need to return a lead that is not yet ready to buy to a marketing team for further nurturing.

## Lead Qualification Process

Lead qualification is the process of determining a lead to be one of the following:

- A prospect that fits your target customer profile and has a high chance to become a customer
- An existing customer with interest in a product or service that this customer has not already purchased

When marketing personnel communicate with leads (for example, during marketing campaigns) and work on developing the leads’ interest in the company’s products or services, they establish qualification criteria, which show that some leads are interested to buy more than others. The particular lead qualification criteria vary for different companies and for different products or services. The number of leads that a marketing team passes to a sales team depends on many factors, such as the sales team’s requirements for leads or the number of the leads a sales team can handle.

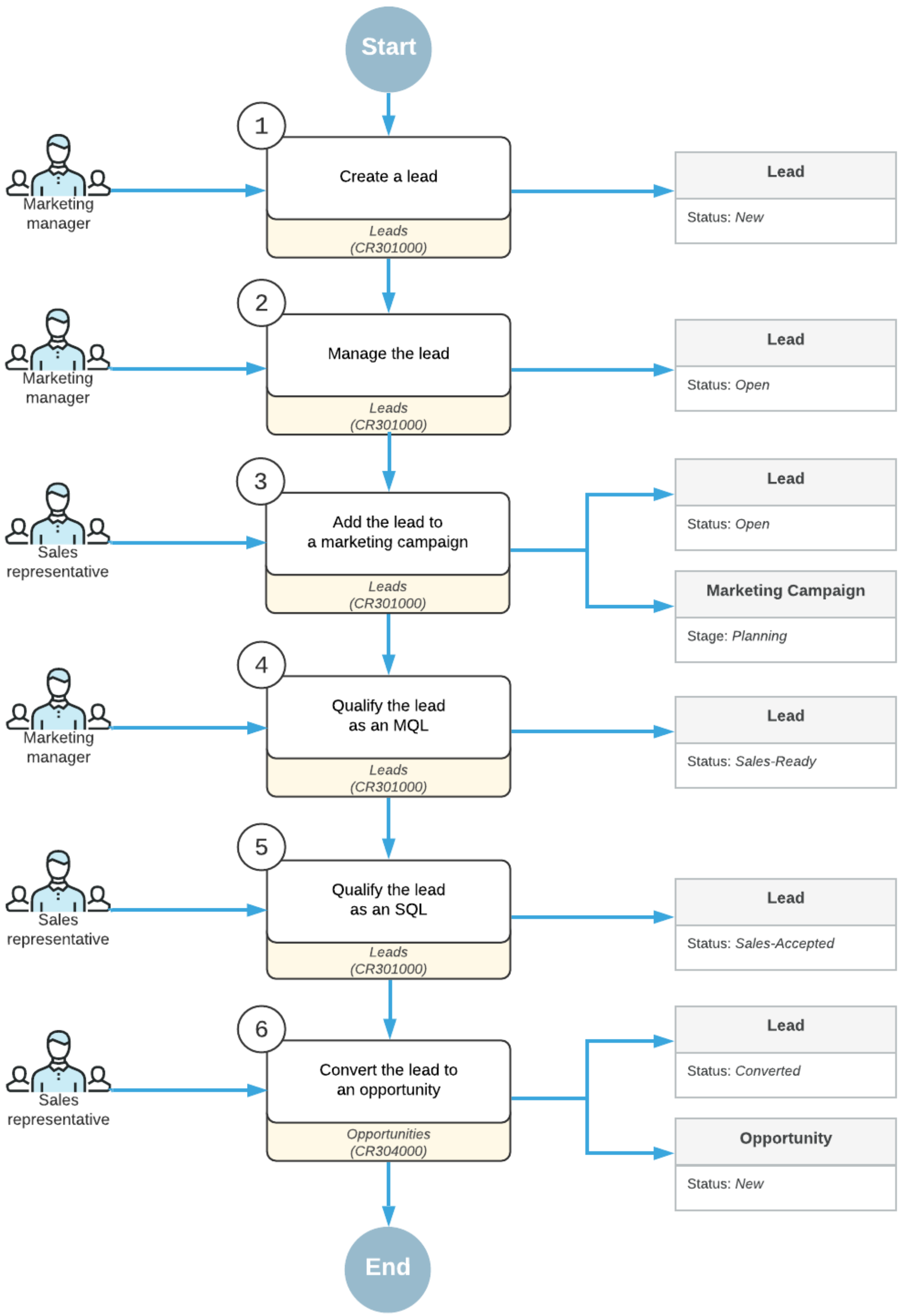
We recommend that marketing and sales teams work together to agree on the criteria of transferring leads from marketing to sales and regularly revise the criteria depending on company sales and other changing conditions. Based on this agreement, in Acumatica ERP, you can create your lead qualification workflow, which consists of stages (identifiable phases, which can be required or optional) in the workflow that relate to particular actions a marketing or a sales employee performs while qualifying each lead. Similarly, the lead proceeds through states—which are represented by statuses in the system—for each stage. The following sections describe this workflow and the ability to implement it in Acumatica ERP.

## Lead Qualification Workflow

CRM functional area in Acumatica ERP includes the lead qualification workflow that helps marketing and sales teams manage leads, add leads to marketing campaigns, qualify leads, associate multiple leads with the same business account and contact, return leads that require further nurturing to marketing and reopen a disqualified lead if needed. You can customize the workflow according to your company's lead qualification processes.

The following diagram illustrates the lead qualification workflow.

## Lead Qualification Workflow



In the lead qualification workflow, transitions between lead states are implemented as actions on the *Leads* (CR301000) form. You can click these actions on the **Actions** menu on the form's toolbar. A lead state is displayed in the **Status** box of the Summary area on the *Leads* form. A system administrator can customize the workflow to define which states correspond to the *Active* (nurtured) state of the lead.

## Lead Qualification as Performed by Sales in Acumatica ERP

When a sales team starts working with a lead, the lead qualifier (for example, a telemarketer or a sales representative) can contact and qualify the MQL, and then record the results in the system. If a lead is not yet ready to buy, a sales manager can return the lead to the marketing team for further nurturing. If the lead confirms interest in the company's products or services, the lead qualifier qualifies the lead as sales-accepted (SAL) and the sales team can take further follow-up actions on the lead, such as converting the lead to an opportunity and creating a contact and a business account for the lead in the system. A lead converted to an opportunity becomes a sales-qualified lead (SQL).

Lead qualification by a sales team may include the following steps to move the lead through the needed stages:

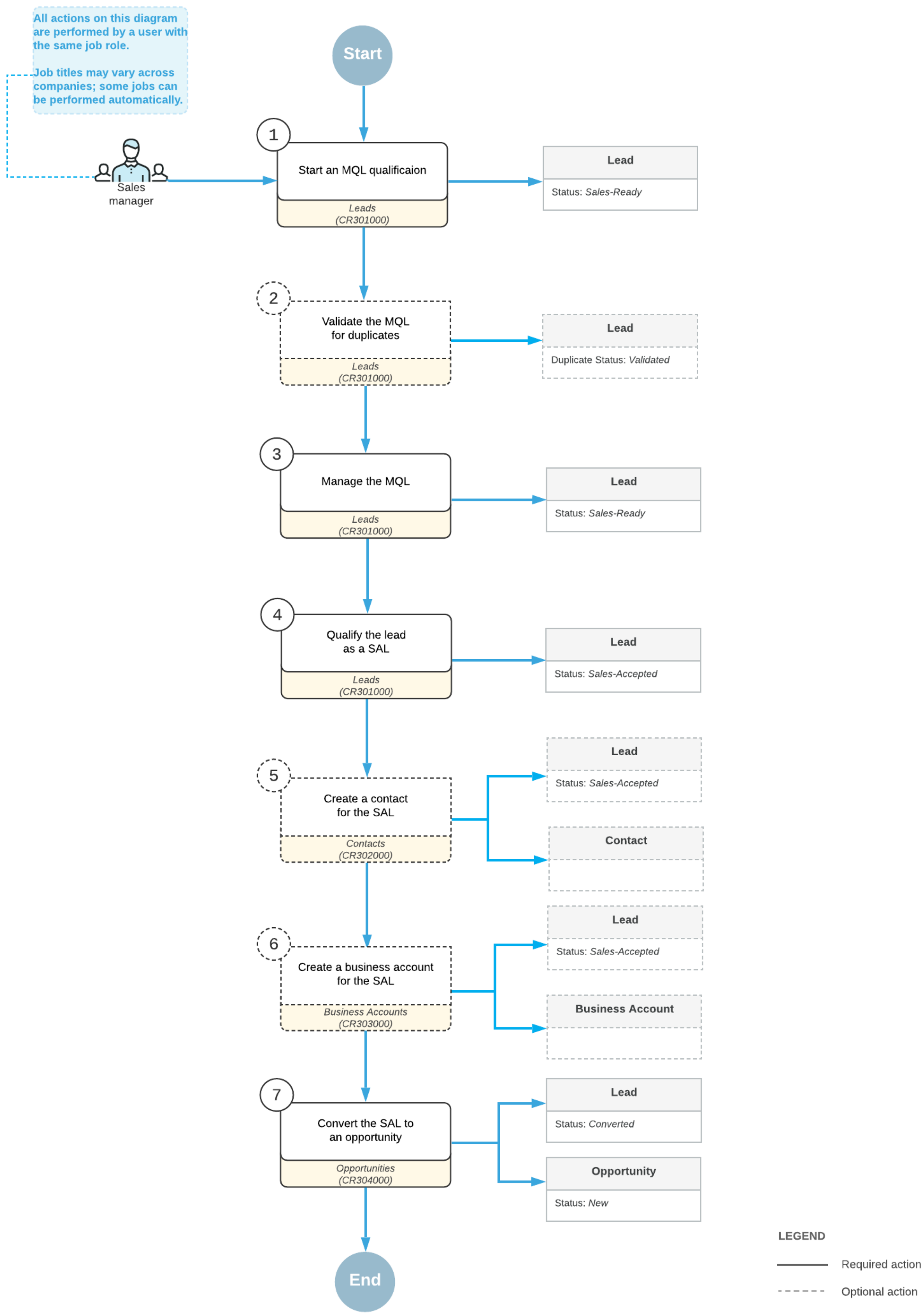
- Validating the lead for duplicates, as described in *Validating Records for Duplicates*.
- Assigning the lead to an owner, as described in *Assigning Leads to Owners and Workgroups*.
- Communicating with the lead, as described in *Managing Emails and Activities* and *Managing Mass Emails*.
- Accepting the lead for follow-up actions by clicking **Actions > Accept** for the lead on the form toolbar of the *Leads* (CR301000) form.
- Creating a contact for the lead, as described in *Creating Contacts*.
- Creating a business account for the lead, as described in *Creating Business Accounts*.
- Converting the lead to an opportunity by clicking **Actions > Convert to Opportunity** for the lead on the form toolbar of the *Leads* form. During this process, you specify basic settings for the opportunity, which will be created on the *Opportunities* (CR304000) form, and create a contact and a business account for the lead if they have not yet been created. Creation of a business account may be required or optional depending on the setting on the *Lead Classes* (CR207000) form: If the **Require Account for Conversion to Opportunity** check box (**Conversion Settings** section of the **Details** tab) is cleared, the creation of a business account will be skipped when the lead is converted to an opportunity.
- Returning the lead to the marketing team for further nurturing by clicking **Actions > Open** for the lead on the form toolbar of the *Leads* form.
- Disqualifying a lead by clicking **Actions > Disqualify** for the lead on the form toolbar of the *Leads* form.
- Reopening a lead that has been disqualified by clicking **Actions > Open** for the lead on the form toolbar of the *Leads* form.

> Any of the stages listed above may be skipped as needed, depending on the company's lead qualification processes for sales.

## Lead Qualification Workflow (Sales)

The following diagram illustrates the lead qualification workflow as performed by a sales team.

## Lead Qualification Workflow (Sales)



## Lead Qualification States

As a lead is being processed by marketing and sales teams, it progresses through various states. Each lead state is represented in the system by a status, which is displayed in the **Status** box in the Summary area of the *Leads* (CR301000) form. Lead statuses are updated by the system, and the **Status** box is unavailable for editing. A user can initiate transitions between lead states—which causes the system to update the status accordingly—by performing actions on the *Leads* form.

In Acumatica ERP, a lead can be assigned one of the following statuses:

- *New*: The lead has been created in the system, but no work has been done on it yet.
- *Open*: The lead is being qualified by the marketing team.
- *Sales-Ready*: The lead has been qualified by a marketing team as showing more interest in the organization's products or services than other leads.
- *Sales-Accepted*: The lead has been initially reviewed and accepted by the lead qualification team, and it is willing to communicate more with the sales team for further qualification.
- *Converted:* The lead has been qualified and converted to an opportunity. Once a lead has this status, most of the boxes on the *Leads* form are read-only; you can edit the value in only the **Description** box in the Summary area.
- *Disqualified*: The lead is showing no interest in the organization's products or services, or is not reachable (for example, the contact information is not valid). This status may also be used for leads that are duplicates of more correct or detailed leads. For more information about finding duplicates among CRM records in Acumatica ERP, see *Validating Records for Duplicates*.

If a lead has the *New*, *Open*, *Sales-Ready*, or *Sales-Accepted* status, the **Active** check box on the **CRM Info** tab of the *Leads* form is selected by default to indicate that the lead can be nurtured by a marketing or sales team. The system clears the check box if the lead has the *Converted* or *Disqualified* status.

During lead qualification, some states may not be needed: For example, in a small company, the same team members might work with leads that are both ready for sales and accepted by sales, and thus one state could be used for leads that are turned over to sales, instead of two.

## Processing of a Lead Through States

As you work with a lead on the *Leads* (CR301000) form, you can select any of the following actions on the form toolbar to move a lead through states (which causes the system to change the statuses accordingly):

- **Open**: Opens the **Details** dialog box, where you select the reason for opening the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Open*. This action is available when the status of the lead record is *New*, *Sales-Ready*, *Sales-Accepted*, *Converted*, or *Disqualified*.
- **Qualify**: Opens the **Details** dialog box, where you select the reason for qualifying the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Sales-Ready*. This action is available when the status of the lead record is *New* or *Open*.
- **Accept**: Opens the **Details** dialog box, where you select the reason for accepting the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Sales-Accepted*. This action is available when the status of the lead is *New*, *Open*, or *Sales-Ready*.

- **Disqualify**: Opens the **Details** dialog box, where you select the reason for disqualifying the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Disqualified*. This action is available if the status of the lead record is *New*, *Open*, *Sales-Ready*, or *Sales-Accepted*.

- **Convert to Opportunity**: Opens the **New Opportunity** dialog box, where you can enter the initial data that is required to create an opportunity. By using that dialog box, you can create a new contact and business account for the lead, if needed, or review the basic settings of the existing ones. The action is available if the status of the lead record is *New*, *Open*, *Sales-Ready*, or *Sales-Accepted*.

A system administrator can configure notifications related to lead statuses. For more information, see *Using Business Events*.

## Qualifying Leads (Sales): To Convert a Lead to an Opportunity

The following activity demonstrates how to convert a lead to an opportunity in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have obtained a lead from the marketing team, which has qualified the lead and your manager has assigned the lead to you. Christina Taylor, a manager at SweetTooth Cafe, visited the company's official website, chose a pro series juicer made by Squeezo Inc., and would like to buy the juicer. You need to get in touch with the lead and find out if Christina is interested in the product. If so, you need to convert the lead to an opportunity.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled.

- On the *Lead Classes* (CR207000) form, the *CAFE* lead class, which defines SweetLife's leads that represent employees from cafes and restaurants, has been created.

- On the *Contact Classes* (CR205000) form, the *CAFE* contact class has been created.

- On the *Opportunity Classes* (CR209000) form, the *PRODUCT* opportunity class has been created.

- On the *Leads* (CR301000) form, the *Christina Taylor* lead has been created.

### Process Overview

In this activity, you will convert a lead to an opportunity on the *Leads* (CR301000) form.

### System Preparation

Before you start converting the lead to an opportunity, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step: Converting a Lead to an Opportunity

To convert the *Christina Taylor* lead to an opportunity, do the following:

1. Open the Leads (CR3010PL) form.
2. In the **Display Name** column, click the *Christina Taylor* link to open this lead on the *Leads* (CR301000) form.

   > To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

3. On the form toolbar, click **Actions > Convert to Opportunity**.
4. In the **New Opportunity** dialog box, which opens, do the following:
   a. In the **Contact** section of the **Main** tab, notice that the system has inserted contact settings specified in the **Contact** section of the *Leads* form.

      > You can change the settings of the contact or add any missing settings, if needed.

   b. In the **Subject** box of the **Opportunity** section, specify `Purchase of JUICER10`.

   c. In the **Opportunity Class** box, select *PRODUCT*.

   d. In the **Business Account ID** box of the **Business Account** section, specify `SWEETTOOTH`.

      > If on the *Lead Classes* (CR207000) form (**Conversion Settings** section of the **Details** tab) the **Require Account for Conversion to Opportunity** check box is cleared, a business account is not required in order to convert a lead to an opportunity. In this case, the dialog box does not contain the **Business Account** section.

   e. In the **Business Account Class** box, select *CAFE*.

   f. At the bottom of the dialog box, **Create**.

      The system closes the dialog box, converts the lead to an opportunity that is created on the *Opportunities* (CR304000) form, creates a contact and a business account for the lead, and returns you to the *Leads* form. On the form, notice that the status of the lead is *Converted* and that values have been inserted in the **Contact** and **Business Account** boxes of the Summary area. Also notice that most of the settings in the Summary area and on the **Contact Info**, **CRM Info**, **Attributes**, and **Campaigns** tabs have become unavailable for editing.

> If you click **Create and Review** instead of **Create** in the **New Opportunity** dialog box, the system closes the dialog box, converts the lead to an opportunity, creates a contact and a business account for the lead (if these did not already exist and their settings have been specified in the dialog box), and opens the *Opportunities* form, on which you can view the settings of the opportunity, make any needed changes, and save the updated opportunity.

You have converted the lead to an opportunity.

## Qualifying Leads (Sales): To Disqualify a Lead

The following activity demonstrates how to disqualify a lead in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have launched an advertising campaign to promote a new series of commercial juicers. The audience is a group of leads that have shown interest in these juicers. During the campaign, you have sent emails with the product descriptions and a survey to gauge the audience's interest in the products. John Livier, the head of the client services department at the Snow Park Restaurant, responded to your survey that the company is no longer interested in commercial juicers. Thus, you need to disqualify the *John Livier* lead.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled.
- On the *Lead Classes* (CR207000) form, the *CAFE* class, which defines SweetLife's leads representing employees from cafes and restaurants, has been created.
- On the *Leads* (CR301000) form, the *John Livier* lead has been created.

### Process Overview

In this process activity, you will disqualify a lead on the *Leads* (CR301000) form.

### System Preparation

Before you start disqualifying a lead, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in as marketing manager Bill Owen by using the following credentials:
    - Username: *owen*

- Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

### Step: Disqualifying a Lead

To disqualify the *John Livier* lead, do the following:

1. Open the Leads (CR3010PL) form.
2. In the **Display Name** column on the Leads (CR3010PL) form, click the *John Livier* link to open this lead record on the *Leads* (CR301000) form.

   > To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

3. On the form toolbar, click **Actions > Disqualify**.
4. In the **Details** dialog box, which opens, select the reason and confirm the action as follows:
   a. In the **Reason** box, select *No Interest*.
   b. Click **OK**.

      The system closes the dialog box and changes the status of the lead to *Disqualified*. Most of the settings in the Summary area and on the **Contact Info**, **CRM Info**, **Attributes**, **Campaigns**, and **Opportunities** tabs have become unavailable for editing.

You have disqualified the lead.

## Lesson 9.2: Creating Business Accounts

### Business Accounts: General Information

As you work with prospective customers, you need to create business accounts in the system, which can later be extended as customer accounts. (They can also be extended as vendor accounts if your company purchases some products or services from the company.) This topic provides information about creating business accounts in Acumatica ERP.

### Learning Objectives

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

- Become familiar with ways of creating business accounts
- Create a business account manually
- Specify a primary contact for the business account
- Create a business account by using the Acumatica ERP mobile app

- Learn about the synchronization of settings in leads, contacts, and business accounts

## Applicable Scenarios

You may want to learn how to create business accounts in scenarios that include the following:

- An employee of your company has contacted the lead and confirmed the contact information and the interest in company's products or services, and you need to convert the lead to an opportunity.
- You have been assigned to the lead whose contact information and interest in company's products or services has been confirmed, and you need to convert the lead to an opportunity.

## Business Accounts in Acumatica ERP

In Acumatica ERP, a business account is a record on the *Business Accounts* (CR303000) form that represents a legal entity (a company or an individual) that your company deals with or intends to sell products and services to; it is generally created in the system when your company is marketing its products or services to the business account. This business account can later be extended as a customer (or as a vendor; a business account can be extended as both a customer and a vendor if you sell products or services to this account and buy products or services from it).

A lead and a contact (or multiple leads and contacts) in the system—which are created on the *Leads* (CR301000) form and the *Contacts* (CR302000) form, respectively—may be associated with a business account. To create a business account, you need to specify a contact for this account. If the needed contact has already been created in the system, you can create a business account and associate the contact with the account. If the needed contact has not been created in the system, the system will create it when you are creating the business account. When you are creating a new business account based on a lead that exists in the system, the system automatically copies the contact information specified on the *Leads* form from the lead to the business account.

## Creation of Business Accounts in Acumatica ERP

The broader process of creating a business account in Acumatica ERP, which is maintained on the *Business Accounts* (CR303000) form, consists of the following steps:

1. Optional: If you are creating a business account based on an existing lead, validating this lead for duplicates. For details, see *Validating Records for Duplicates*.
2. Creating the business account (from a lead, contact, through lead conversion to an opportunity, or manually).
3. Optional: Creating a contact associated with the business account.
4. Specifying a primary contact for the business account.

You can create a business account in any of the following ways:

- On the *Leads* (CR301000) form when you convert the lead selected on the form to an opportunity: You click **Actions > Convert to Opportunity** on the form toolbar. In the **New Opportunity** dialog box, which opens, you specify the opportunity and business account settings (specifying business account settings may be required or optional depending on conversion settings on the *Lead Classes* (CR207000) form for the lead). You then click **Create** or **Create and Review** to create the opportunity and business account. For detailed instructions, see *Qualifying Leads (Sales): To Convert a Lead to an Opportunity*.

- On the *Leads* or *Opportunities* (CR304000) form if you create a business account associated with the lead or opportunity selected on the form: You click **Actions > Create Account** on the form toolbar. In the **New Account** dialog box, which opens, you specify the basic business account and contact settings, and then you click **Create** or **Create and Review** to create the business account.
- On the *Contacts* (CR302000) form if you create a business account associated with the contact selected on the form: You do this by clicking **Actions > Create Account** on the form toolbar. In the **New Account** dialog box, which opens, you specify the business account settings and click **Create** or **Create and Review** to create the business account.
- Directly on the *Business Accounts* (CR303000) form: In this case, you add a new record and manually enter the settings of the new business account.
- Directly by using the Acumatica mobile app. For detailed instructions, see *Business Accounts: To Create a Business Account by Using the Acumatica Mobile App*.

Regardless of how you create the business account, you can select a business account class in the **Class** box on the *Business Accounts* form or in one of the dialog boxes mentioned above, which causes the system to insert default settings for the business account, easing the process of content creation. (For details, see *Defining Business Account Classes*.)

Once a business account has been created, you can associate one or multiple leads or contacts with the business account and select a primary contact for it, as described in the following section.

## Creation of Contacts Associated with a Business Account

When you create a business account on the *Leads* (CR301000) or *Contacts* (CR302000) form by specifying the business account and contact settings in the **New Account** dialog box, the system also creates a contact and associates this contact with the business account. On the *Business Accounts* (CR303000) form, you can view and modify the address details of the contact on the **General** tab and view the contact settings of the contact on the **Contacts** tab. On the **Contacts** tab, you can also create as many contacts associated with the business account as needed.

We recommend that you specify a primary contact associated with the business account, as described in the following section.

## Primary Contact for a Business Account

In Acumatica ERP, you can specify a primary contact for a business account. A primary contact is the contact whose contact and address settings the system uses as the default contact for the associated records and documents that have contact settings on them, such as an opportunity created for the business account on the *Opportunities* (CR304000) form, thus ensuring that the contact who officially represents the business is used in these records. A primary contact gives you the following abilities:

- Quickly add to the system the contact information of a business and the official representative of this business
- Easily differentiate between the contact information of the business and the official representative of this business
- View the contact information of both the business and the official representative of this business on the same tab (the **General** tab) of the *Business Accounts* (CR303000) form.

Only one primary contact can be selected for a business account. On the **General** tab of the *Business Accounts* form, you can specify or change the primary contact. On the **Contacts** tab of this form, you can select any contact associated with the business account as the primary one by clicking the contact and then clicking the **Set as Primary** button on the table toolbar. This causes the system to select the check box in the **Primary** column for the new primary contact and to populate the UI elements in the **Primary Contact** section of the **General** tab with the settings of the new primary contact.

For an existing contact on the *Contacts* (CR302000) form, if you clear the value in the **Business Account** box, the system displays a warning about the possibility of changing the primary contact for the account. If you proceed with clearing the **Business Account** box for the contact—thus deleting the link between the contact and the business account—on the **General** and **Contacts** tabs of the *Business Accounts* form, the system clears all settings related to the primary contact.

### Synchronization of Settings in Leads, Contacts, and Business Accounts

In Acumatica ERP, you can easily synchronize the contact-related settings of a lead with the same settings in the contact and business account related to that lead. With this synchronization turned on, changes to the contact information of any of these entities causes the settings in the related entities to be updated as well.

> The synchronization or overriding of settings applies to all the settings on the **Contact Info** tab of the *Leads* (CR301000) form, all the settings on the **Details** tab of the *Contacts* (CR302000) form, and the contact and address settings (of the primary contact of the business account) on the **General** tab of the *Business Accounts* (CR303000) form.

You can synchronize contact information in leads, contacts, and business accounts by using the **Override** check box on the **Details** tab of the *Contacts* (CR302000) form as follows:

- If the check box is cleared and the business account related to the contact has not been extended as a customer or a vendor yet, the contact information of the contact on the *Contacts* form is synchronized with the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms, respectively, and can be updated in both directions. That is, if you update the contact and address settings on any of these forms, the settings will be also updated on the related forms.
- If the check box is selected, the contact information for the selected contact on the *Contacts* form can differ from the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms. If contact information is updated on any of these forms, the changes are not applied to the other forms.

## Business Accounts: Extension of a Business Account as a Customer or Vendor

The organizations to which your company intends to sell products and services can be initially defined in Acumatica ERP as business accounts on the *Business Accounts* (CR303000) form. These prospective customers may later become customers, vendors, or even both customers and vendors.

### Business Account Extended as a Customer

When a prospective customer (which is defined in the system as a business account) purchases products or services from your company, you can easily extend the business account to be a customer in Acumatica ERP, so that you do not need to enter the same data again.

Customers can also be created in the system directly without first being defined as business accounts. If a customer is created first, the system automatically creates a business account.

You extend a business account as a customer account by clicking the **Extend as Customer** button or menu command on the form toolbar of the *Business Accounts* (CR303000) form. The system opens the *Customers* (AR303000) form with the appropriate settings copied from the business account. On the form, you specify the customer class, the financial settings, and additional settings (such as billing address) that may be used in Acumatica ERP documents of the customer. You then save the customer record and close the form to return to the business account record you were viewing; this business account is maintained in the system.

Business accounts and customers share the same statuses—displayed in the **Customer Status** box of the Summary area of the *Business Accounts* (CR303000) and *Customers* (AR303000) forms—which may be one of the following: *Prospect*, *Active*, *On Hold*, *Credit Hold*, *One-Time*, or *Inactive*.

When you save the customer to which you have extended the business account, the system changes the type of the business account, shown in the **Type** box on the **CRM Info** tab on the *Business Accounts* form, for *Customer*. (If a prospective customer account has been extended as both customer and vendor, the type of the account changes for *Customer & Vendor*.)

To mass-change the statuses of multiple business accounts or mass-update their settings, you can use the *Update Business Accounts* (CR503320) form.

### Business Account Extended as a Vendor

When a prospective or existing customer (which is defined in the system as a business account) becomes a vendor of certain products or services to your company, you can easily extend the business account to be a vendor in Acumatica ERP, so that you do not need to enter the same data again. A business account can be extended as both a customer and a vendor, or just one of these.

Vendors can also be created in the system directly without first being defined as business accounts. If a vendor is created first, the system automatically creates a business account.

You extend a business account as a vendor account by clicking the **Extend as Vendor** button or menu command on the form toolbar of the *Business Accounts* (CR303000) form. The system opens the *Vendors* (AP303000) form with the appropriate settings copied from the business account. On the form, you specify the vendor class, the financial settings, and additional settings (such as billing address) that may be used in Acumatica ERP documents of the vendor. You then save the vendor record and close the form to return to the business account record you were viewing; this business account is maintained in the system.

Statuses of a vendor are independent from statuses of a business account. The status of a vendor, shown in the **Vendor Status** box of the *Vendors* (AP303000) form, can be one of the following: *Active*, *On Hold*, *Hold Payments*, *Inactive*, and *One-Time*. Changes to the status of the vendor do not cause changes to the status of the associated business account (and customer, if applicable), and if the status of the business account changes, the system does not change the status of the associated vendor.

When you save the vendor to which you have extended the business account, the system changes the type of the business account, shown in the **Type** box on the **CRM Info** tab on the *Business Accounts* form, for *Vendor*. (If a prospective customer has been extended as both customer and vendor, the type of the account changes for *Customer & Vendor*.)

To mass-change the statuses of multiple business accounts or mass-update their settings, you can use the *Update Business Accounts* (CR503320) form.

## Business Accounts: To Create a Business Account Manually

The following activity demonstrates how to manually create a business account, review and update the settings of the newly created account, and associate a primary contact with the account.

The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have received an inquiry submitted via the company's website form by Debbie Euston, the assistant bakery manager at Delicious Crispy, a bakery that bakes pastries, usually with jam filling. Debbie is considering purchasing 100 jars of apple jam. You have created the lead in the system, emailed the company's price list to Debbie, and called her, and Debbie confirmed her interest in purchasing the jam. You have created a contact, and now you need to create a business account in the system.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
    - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
    - *Lead/Contact Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality.
- Validation settings have been specified on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form.
- The *BAKERY* business account class has been defined in the system.
- On the *Contacts* (CR302000) form, the *Debbie Euston* and *Patrick Roberts* contacts have been created in the system.

## Process Overview

In this activity, you will do the following

1. By using the *Contacts* (CR302000) form as a starting point, create a business account manually based on a contact that has been added to the system.
2. By using the *Business Accounts* (CR303000) form, do the following:
    a. Review and update the settings of the newly created business account.
    b. Select a primary contact for the newly created business account.
    c. Select an owner for the newly created business account.

## System Preparation

Before you start creating a business account, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:

- Username: *chubb*
- Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

### Step 1: Creating a Business Account Based on a Contact

To create a business account for the contact *Debbie Euston*, and specify additional settings for it (its primary contact and its owner in your company who will work with the account) do the following:

> You can perform similar instructions to create a business account by using the *Leads* (CR301000) form as a starting point.

1. In the **Contact** column on the Contacts (CR3020PL) form, click the *Debbie Euston* link to open this contact on the *Contacts* (CR302000) form.

   > To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

2. On the form toolbar, click **Actions > Create Account**.
3. In the **New Account** dialog box, which opens, do the following:
   a. On the **Main** tab of the dialog box, specify the settings of the business account as follows:
      1. In the **Business Account ID** box, type `DELICRISP`.
      2. In the **Business Account Class** box, select *BAKERY*.

   b. Click **Create and Review**. The system creates a business account and opens the newly created account on the *Business Accounts* (CR303000) form.
4. On the **Contacts** tab of the form, notice that the row has been added for the *Debbie Euston* contact associated with the business account. Also notice that the **Primary** check box is cleared for the contact.
5. On the **General** tab, in the **Name** box of the **Primary Contact** section, select the *Debbie Euston* contact. Notice that the **Primary Contact** section has become populated with the data from the associated contact.
6. On the **Contacts** tab, you can see that the **Primary** check box has been selected for the *Debbie Euston* contact because the contact was defined as primary for the business account.
7. In the **Owner** box of the Summary area, select *David Chubb*, because this is the user account to which you are signed in and you are the employee in your system who will primarily work with this business account.
8. Click Save and Close. The system returns you to the *Contacts* form. In the **Business Account** box of the Summary area, you can see the name of the business account: *DELICRISP—Delicious Crispy*.

In situations where you do not want to specify additional settings for the business account until later, you could click **Create** to close the **New Account** dialog box. In this case, the new business account would be created, the name of the business account would be inserted in the **Business Account** box of the Summary area on the *Contacts* form, and the contact would be added to the **Contacts** tab of the *Business Accounts* form, but no primary contact would be specified in this business account.

You have created a business account for the *Debbie Euston* contact.

## Step 2. Associating a New Contact with a Business Account

Suppose that Patrick Roberts, a new manager at Delicious Crispy has contacted you and asked to send him the SweetLife price list. You have created a new *Patrick Roberts* contact in the system and need to associate this contact with the *DELICRISP* business account.

To associate the *Patrick Roberts* contact with the *DELICRISP* business account, do the following:

1. Open the Contacts (CR3020PL) form.
2. In the **Contact** column, click the *Patrick Roberts* link to open this contact record on the *Contacts* (CR302000) form.

   To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

3. In the Summary area of the form, in the **Business Account** box, click the magnifier button.
4. In the lookup table that opens, select *DELICRISP*.
5. On the form toolbar, click **Save**.

You have associated a new contact with the business account. The system has added this contact on the **Contacts** tab of the *Business Accounts* (CR303000) form.

## Step 3: Changing the Primary Contact for the Business Account

Suppose that Debbie Euston has been promoted to another job in the company, and now you should contact her colleague, Patrick Roberts. You have created the *Patrick Roberts* contact and associated this contact with the *DELICRISP* business account as described in the previous step.

To change the primary contact for the *DELICRISP* business account, do the following:

1. While you are still viewing the *Patrick Roberts* contact on the *Contacts* (CR302000) form, in the Summary area, click the Edit button right of the **Business Account** box.
2. On the **General** tab of the *Business Accounts* (CR303000) form, which opens in a pop-up window, in the **Name** box of the **Primary Contact** section, click the magnifier button.
3. In the lookup table that opens, select *Patrick Roberts*. Notice that the **Primary Contact** section has become populated with the contact and address settings of the new primary contact. On the **Contacts** tab, you can see that the **Primary** check box has been selected for the *Patrick Roberts* contact because the contact was defined as primary for the business account.

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

You have changed the primary contact for the *DELICRISP* account to *Patrick Roberts*.

## Business Accounts: To Create a Business Account by Using the Acumatica Mobile App

The following activity demonstrates how to create a business account by using the Acumatica mobile app.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. At the annual conference for food and beverage suppliers, you became acquainted with Bruce Ward, a procurement manager at Store National, a chain of supermarkets in the United States. Bruce has decided to choose SweetLife as a new supplier of fresh fruit. You have created the contact in the system, and now you need to quickly create a new business account for further processing of developments with the business in the system (which involves creating an opportunity).

> You can find detailed instructions on creating a contact through the Acumatica mobile app in *Contacts: To Create a Contact by Using the Acumatica Mobile App* and detailed instructions on creating opportunities in *Opportunities: To Create an Opportunity by Using the Acumatica Mobile App*.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- The Acumatica mobile app has been downloaded and installed on the mobile device that will be used for creating a business account in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.
- The Acumatica ERP instance has been hosted over HTTPS. For more information, see *Setting Up an HTTPS Service in Web Server (IIS)*.
- The *Bruce Ward* contact has been created in the system on the *Contacts* (CR302000) form.

### System Preparation

Before you start creating a new business account in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating a business account in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.

   > The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see *Setting Up an HTTPS Service in Web Server (IIS)*.

## Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create a business account by using the Acumatica mobile app.

## Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.
2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).
3. Optional: In the **Account Name** box, specify the name of the user account.
4. Tap **Next**.
5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

## Step 2: Creating a Business Account by Using the Acumatica Mobile App

To quickly create a business account by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.
2. On the main menu of the app, tap the **Business Accounts** tile.
3. On the Business Accounts screen, tap the Add Record button.

   The **Summary** tab opens.
4. Do the following:
   - In the **Business Account** box, type `STORENAT`.
   - In the **Account Name** box, type `Store National`.
   - In the **Account Email** box, type `b.ward@storenational.example.com`.
5. Swipe upward and tap **Account Address**. This expands the group of related elements.
6. Specify the address information as follows:

- In the **City** box, type `New York`
- In the **Country** box, select *United States of America*.

7. Open the **Other** tab.
8. Tap **CRM** to expand the group of related elements.
9. In the **Class ID** box, select *Supermarkets, stores, groceries*.
10. Tap the Save button to save the business account.

# Lesson 9.3: Creating Contacts

## Contacts: General Information

You can create contacts in Acumatica ERP to represent the people associated with leads and business accounts (and later customers, if a sale occurs, or even vendors). This topic provides information about creating contacts in Acumatica ERP.

> Contacts can be associated with a variety of entities in the system. In this chapter, we focus on contacts as they relate to customer relationship management (CRM) functionality. That is, the chapter primarily discusses the contacts associated with prospective customers before they have purchased your company's products or services.

### Learning Objectives

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

- Become familiar with ways of creating contacts
- Learn about the synchronization of settings in leads, contacts, and business accounts
- Learn about address validation and enrichment through third-party providers
- Create a contact manually
- Create a contact by using the Acumatica ERP mobile app
- Create a contact by using the Acumatica add-in for Outlook

### Applicable Scenarios

You may want to learn how to create contacts in scenarios that include the following:

- An employee of your company has contacted a lead and confirmed the contact information and the interest in company's products or services, and you need to convert the lead to an opportunity.
- You have been assigned to a lead whose contact information and interest in the company's products or services has been confirmed.

## Contacts in Acumatica ERP

In Acumatica ERP, a contact is a record on the *Contacts* (CR302000) form that represents an individual and that can be associated with a variety of entities in the system. When you create a contact record, you enter the settings related to the information you have obtained, such as the individual's name, address, email address, and phone number.

If you have created a lead in the system before you create the related contact, you specify the lead's basic contact information on the **Contact Info** tab of the *Leads* (CR301000) form. When you create a contact for this lead, the system copies the contact information of the lead to the associated contact.

Any contact can be associated with one lead or multiple leads and with only one business account. You can synchronize contact information in the associated lead, contact, and business account to keep your data consistent and reliable. You can also easily navigate between the associated contacts, leads, and business accounts. For more information on business accounts, see *Creating Business Accounts*.

## Contact Creation in Acumatica ERP

In Acumatica ERP, you can create contacts in multiple ways depending on your company's business processes and maintain them on the *Contacts* (CR302000) form. If you use customer relationship management (CRM) functionality and you are processing a lead for which the contact information and interest in buying the company's products or services have been confirmed, you can convert the lead to an opportunity, which may involve the creation of a business account and a contact for this lead. You can validate an individual lead for duplicates before you create a contact. For details, see *Validating Records for Duplicates*. You can also create a contact manually if needed.

In Acumatica ERP, you can create a contact in any of the following ways:

- On the *Leads* (CR301000) form when you convert the lead selected on the form to an opportunity: You click **Actions > Convert to Opportunity** on the form toolbar. In the **New Opportunity** dialog box, which opens, you specify the opportunity and business account settings. (The system automatically inserts the basic settings for the contact based on the settings of the lead, but you can override any of them.) You then click **Create** or **Create and Review** to create the opportunity and contact. For detailed instructions, see *Qualifying Leads (Sales): To Convert a Lead to an Opportunity*.

- On the *Leads*, *Business Accounts* (CR303000), *Opportunities* (CR304000), *Vendors* (AP303000), or *Customers* (AR303000) forms if you create a contact associated with the entity selected on the form: You click **Actions > Create Contact** on the form toolbar. In the **New Contact** dialog box, which opens, you specify the basic contact settings (additional settings can be specified on the *Contacts* form), and then you click **Create** or **Create and Review** to create the contact.

- On the *Leads* or *Opportunities* form if you specify the settings of the primary contact when you create a business account for the selected lead or opportunity: You do this by clicking **Actions > Create Account** on the form toolbar. In the **New Account** dialog box, which opens, you specify the basic business account and contact settings, and click **Create** or **Create and Review** to create the business account and contact.

- Directly on the *Contacts* (CR302000) form: In this case, you add a new record and manually enter the settings of the new contact.

- By creating a contact from the Acumatica add-in for Outlook, based on the details of the selected email recipient or sender: For detailed instructions, see *Contacts: To Create a Contact by Using the Acumatica Add-In for Outlook*

- Directly by using the Acumatica ERP mobile app: For detailed instructions, see *Contacts: To Create a Contact by Using the Acumatica Mobile App*.

- Directly by scanning a contact's business card into the Acumatica ERP mobile app: For detailed instructions, see *Contacts: To Create a Contact Through Business Card Recognition*.

The system assigns the *Active* status to a new contact; this status, displayed in the **Status** box of the Summary area on the form, indicates that the contact is available in lookup tables for the **Contact** element on forms. If the contact is not reachable (for example, the person represented by the contact has resigned from the company you are working with), you can click **Actions > Deactivate**, and the system assigns the *Inactive* state to this contact.

Regardless of how you create the contact, you can select a contact class on the *Contacts* form or in one of the dialog boxes mentioned above, which causes the system to insert default settings for the contact, easing the process of content creation. (For details, see *Defining Contact Classes*.)

The *Contacts* form contains the complete settings of the contact, which you can view and edit. On the **Activities** tab of this form, you can create and work with all the activities related to the contact, including planned, current, and completed activities. For details, see *Managing Emails and Activities*.

## Synchronization of Settings in Leads, Contacts, and Business Accounts

In Acumatica ERP, you can easily synchronize the contact-related settings of a lead with the same settings in the contact and business account related to that lead. With this synchronization turned on, changes to the contact information of any of these entities causes the settings in the related entities to be updated as well.

> The synchronization or overriding of settings applies to all the settings on the **Contact Info** tab of the *Leads* (CR301000) form, all the settings on the **Details** tab of the *Contacts* (CR302000) form, and the contact and address settings (of the primary contact of the business account) on the **General** tab of the *Business Accounts* (CR303000) form.

You can synchronize contact information in leads, contacts, and business accounts by using the **Override** check box on the **Details** tab of the *Contacts* (CR302000) form as follows:

- If the check box is cleared and the business account related to the contact has not been extended as a customer or a vendor yet, the contact information of the contact on the *Contacts* form is synchronized with the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms, respectively, and can be updated in both directions. That is, if you update the contact and address settings on any of these forms, the settings will be also updated on the related forms.

- If the check box is selected, the contact information for the selected contact on the *Contacts* form can differ from the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms. If contact information is updated on any of these forms, the changes are not applied to the other forms.

## Contact Relations with Acumatica ERP Entities

Once a contact has been defined in the system on the *Contacts* (CR302000) form, it can be associated with any of the following entities in Acumatica ERP:

- Leads: A lead or multiple leads can be associated with a contact. On the **Leads** tab of the *Contacts* form, you can see the list of leads associated with the contact.

- Business accounts: In the **Business Account** box in the Summary area of the *Contacts* form, an associated business account may be specified for a contact. Multiple contacts can be associated with one business account, but only one primary contact can be selected for an account. For details, see *Creating Business Accounts*.

- Marketing lists: A contact may be added to a marketing list and subscribed to newsletters and other mailings. On the **Marketing Lists** tab of the *Contacts* form, you can see all marketing lists in which the contact is included. For more information about marketing lists, see *Managing Marketing Lists*.
- Marketing campaigns: On the **Campaigns** tab of the *Contacts* form, you can view a list of all completed, ongoing, and planned marketing campaigns in which the contact is involved. For details about campaigns in Acumatica ERP, see *Managing Marketing Campaigns*.
- Opportunities: The **Opportunities** tab of the *Contacts* form lists all opportunities linked to the contact.
- Cases: The **Cases** tab of the *Contacts* form contains a list of all cases associated with the contact.
- Users: A contact may be associated with an external user that may have access to the system. You can use the **User Info** tab of the *Contacts* form to view and edit information about the user account associated with the contact.
- Employees: When the employee record is created and saved in the system, the system creates a contact for this employee and associates this employee record with this contact record. You can see the contact information on the *Employees* (EP203000) form, in the **Contact Info** section on the **General Info** tab.

## Contacts: To Create a Contact Manually

The following activity demonstrates how to manually create a contact and review and update the settings of the newly created contact.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have received a call from Thomas Jones, the bakery manager at Pro Muffin, a bakery that cooks pastries, usually with jam filling. Thomas is considering purchasing 100 jars of cherry jam. You have created the lead in the system, converted the lead to an opportunity, and started negotiating the deal. Thomas asks you to discuss the financial details of the deal with his colleague Tina Parker, a finance manager, and gives you her contact details. You need to create a contact in the system and associate the contact with the opportunity created for Pro Muffin.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.

- *Lead/Contact Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality.

- Validation settings have been specified on the **Duplicate Validation Settings** tab of the *Customer Management Preferences* (CR101000) form.
- The *BAKERY* contact class has been created on the *Contact Classes* (CR205000) form.
- A lead record for the *Thomas Jones* lead has been created on the *Leads* (CR301000) form and converted to an opportunity as follows:

  **a.** The *Purchase of 100 jars of cherry jam by Pro Muffin* has been created on the *Opportunities* (CR304000) form.

  **b.** The *PROMUFFIN* business account has been created on the *Business Accounts* (CR303000) form.

  **c.** The *Thomas Jones* contact has been created on the *Contacts* (CR302000) form.

## Process Overview

In this activity, you will do the following:

1. Manually create a contact by using the *Contacts* (CR302000) form.
2. Associate the newly created contact with an existing opportunity on the *Opportunities* (CR304000) form.

## System Preparation

Before you start creating a contact manually, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Creating a Contact Manually

To create a contact for Tina Parker, a finance manager at Pro Muffin, do the following:

1. Open the Contacts (CR3020PL) form.
2. On the form toolbar, click **New Record**.
3. On the **Details** tab of the *Contacts* (CR302000) form, which opens, do the following:

   **a.** In the **Contact** section, specify the contact settings as follows:

      1. In the **First Name** box, type `Tina`.
      2. In the **Last Name** box, type `Parker`.
      3. In the **Company Name** box, type `Pro Muffin`.

4. In the **Job Title** box, type `Finance Manager`.
5. In the **Email** box, type `tina@promuffin.example.com`.

b. In the **Address** section, specify the address settings as follows:

1. In the **Address Line 1** box, type `4897 Mapleview Drive`.
2. In the **City** box, type `Philadelphia`.
3. In the **State** box, select *PA*.
4. In the **Postal Code** box, type `63463`.
5. In the **Country** box, select *US*.

4. On the **CRM Info** tab, in the **Contact Class** box, select *BAKERY*.
5. On the form toolbar, click **Save**.

You have created the *Tina Parker* contact in the system.

### Step 2. Associating the Contact with an Existing Opportunity

To associate the *Tina Parker* contact you have created with the opportunity that has been created for Pro Muffin, do the following:

1. In the **Opportunity ID** column of the Opportunities (CR3040PL) form, click the link for the opportunity *Purchase of 100 jars of cherry jam by Pro Muffin* in the **Subject** box. The opportunity opens on the *Opportunities* (CR304000) form.
2. Open the **Relations** tab.
3. Click **Add Row** on the table toolbar, and specify the following settings in the row:
   a. **Role**: *Related Entity*
   b. **Type**: *Contact*
   c. **Contact**: *Tina Parker*
4. On the form toolbar, click **Save**.

You have associated the *Tina Parker* contact with the opportunity created for Pro Muffin.

## Contacts: To Create a Contact by Using the Acumatica Mobile App

The following activity demonstrates how to create a contact by using the Acumatica mobile app.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. At the annual conference for food and beverage suppliers, you met with Eva Johnson, a new director of the supply chain at Storehut, a chain of supermarkets in New York. Storehut is a current SweetLife customer. You need to create a new contact in the system for your existing *STOREHUT* customer.

> You can find detailed instructions on creating a business account through the Acumatica mobile app in *Business Accounts: To Create a Business Account by Using the Acumatica Mobile App* and detailed instructions on creating an opportunity in *Opportunities: To Create an Opportunity by Using the Acumatica Mobile App*.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Business Accounts* (CR303000) form, the *STOREHUT* business account has been created and extended as a customer.

## System Preparation

Before you start creating a new contact in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating a contact in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.

   > The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see *Setting Up an HTTPS Service in Web Server (IIS)*.

## Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create a contact by using the Acumatica mobile app.

## Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.

2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).

3. Optional: In the **Account Name** box, specify the name of the user account.

4. Tap **Next**.

5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

### Step 2: Creating a Contact by Using the Acumatica Mobile App

To create a contact on the fly by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.

2. On the main menu of the app, tap the **Contacts** tile.

3. On the Contacts screen, tap the Add Record button.

   The **Summary** tab opens.

4. Specify the following settings:

   - **First Name**: `Eva`
   - **Last Name**: `Johnson`
   - **Job Title**: `Director of Supply Chain`

5. In the **Business Account** box, select *STOREHUT*.

6. Swipe upward and tap **Details**. This expands the group of related elements.

7. In the **City** box, specify `New York`.

8. Make sure that in the **Country** box, *United States of America* is specified.

9. Tap the **Other** tab of the app form.

10. Tap **CRM Info** to expand the group of related elements.

11. In the **Contact Class** box, select *Supermarkets, stores, groceries*.

12. Tap the Save button to save the contact.

# Lesson 9.4: Managing Tasks

In this lesson, you will learn how to create an activity of the *Task* type. For more information about activities, see *Lesson 6.2: Managing Emails and Activities* and *Lesson 10.3: Managing Events*.

## Emails and Activities: Tasks

In Acumatica ERP, you can create tasks that are associated with entities related to customer relationship management (CRM), such as leads, contacts, business accounts, marketing lists, marketing campaigns, opportunities, sales quotes, projects, project tasks, project quotes, cases, and employees. While viewing any of these entities on its data entry form, you can create a task associated with it and track all tasks (and other activities) related to the entity.

## Creation and Tracking of Tasks for an Entity

You can create a task associated with any of these entities by clicking the **Add Task** button on the table toolbar of **Activities** tab of any of the following forms:

- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Mass Emails* (CR308000)
- *Marketing Lists* (CR204000)
- *Marketing Campaigns* (CR202000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)
- *Employees* (EP203000)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)

When you click the button, the *Task* (CR306020) form opens in a pop-up window, where you can specify the needed details. By default, the system inserts your employee ID in the **Owner** box of the **Details** tab, but you can reassign the task to another employee. When you save the task, the system returns you to the form you added the activity from and adds a row with the *Task* type to the **Activities** tab of the form.

When you create a task, on the **Details** tab of the *Task* form, you can set up a reminder for it (by selecting the **Reminder** check box) and specify on which day before the due date the task owner should receive the reminder (in the **Remind At** box). On the specified date, the reminder will appear on the task owner's Acumatica ERP screen so that the creator or the owner can complete the task or change its status.

On the **Activities** tab, you can view the details of the task (or any listed activity) by clicking the link in the **Summary** column of the appropriate row, which opens the task on the form used to create it (which varies depending on the activity type) in a pop-up window.

## Copying of Lead-Related Tasks to Related Entities

If you create tasks related to a lead, and then you create a contact or business account for the lead or convert the lead to an opportunity, the system copies all the tasks (and other activities) listed on the **Activities** tab of the *Leads* form to the same tab of the *Contacts* (CR302000), *Business Accounts* (CR303000), or *Opportunities* (CR304000) form, respectively. Thus, the system preserves the history of tasks and other activities created for the lead and copies this history to the entities associated with the lead.

Tasks that you create on the *Contacts*, *Business Accounts*, and *Opportunities* forms are associated with only the entity (contact, business account, or opportunity) for which they have been created.

### Task Management

On the *Tasks* (WZ202000) form, you can manage the tasks of the selected business process scenario. The scenario is represented in a tree format and consists of the tasks to be executed to complete a complicated process in Acumatica ERP. For details, see *Managing Scenarios*.

By using the *Event and Task Categories* (EP204040) form, you can create a list of task categories and provide a color code for each category. If you do, when you open the list of your tasks on the *Tasks* (EP404000) form, you will see the tasks highlighted with colors corresponding to the categories.

## Emails and Activities: To Create a Task

The following activity will demonstrate how to create a task.

The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Donna Coleman, a purchasing manager at Yummy Supplies supermarket, is searching for a new supplier of fresh fruit and would like to meet you in order to discuss the company's products and services. You need to create a task for preparing for the meeting with Donna.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, the *Donna Coleman* lead has been added to the system.

### Process Overview

In this activity, you will create a task on the **Activities** tab of the *Leads* (CR301000) form.

### System Preparation

Before you start creating a task, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*

- Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

### Step: Creating a Task

To create a task related to the *Donna Coleman* lead, do the following:

1. In the **Display Name** column on the Leads (CR3010PL) form, click the *Donna Coleman* link.

   > To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

2. On the *Leads* (CR301000) form, which opens, open the **Activities** tab.
3. On the table toolbar, click **Add Task**. The *Task* (CR306020) form opens in a pop-up window. In the **Related Entity** box, the *Donna Coleman* lead is specified.
4. On the **Details** tab, specify the following settings:
   - **Summary**: `Preparing for the meeting with D. Coleman`
   - **Start Date**: The current date
   - **Due Date**: The current date
   - **Completion (%)**: The percent of the task completion (for example, you can specify 5 %)
   - **Reminder**: Selected if you want a reminder about the task to be sent to you (as David Chubb, the owner of this task)
   - **Remind at**: The current date and any time in the near future, such as five minutes from now
   - **Priority**: *Normal*
   - **Status**: *Processing*
   - **Category**: The category of the task, if applicable
5. Optional: In the text editor area, type your comments or any other information related to the task.
6. On the form toolbar, click Save and Close.

You have created a task; notice that a row with the *Task* type is added to the table on the **Activities** tab of the *Leads* form for the lead.

# Lesson 10: Managing Opportunities

## Lesson 10.1: Creating Opportunities

## Opportunities: General Information

You define a sales opportunity in the system to track potential deals as they progress through your sales pipeline toward closing. This topic provides information about creating opportunities in Acumatica ERP.

### Learning Objectives

In this chapter, you will do the following:

- Become familiar with ways of creating opportunities
- Learn about the synchronization of settings in opportunities, contacts, and business accounts
- Develop a general understanding of the settings of opportunities
- Learn about address validation and enrichment through third-party providers
- Create an opportunity through lead conversion
- Create an opportunity manually
- Create an opportunity by using the Acumatica mobile app

### Applicable Scenarios

You may want to learn how to create opportunities in Acumatica ERP in scenarios that include the following:

- A lead has contacted you and confirmed the intention to buy the company's products or services.
- An existing customer has confirmed the intention to again buy the company's products or services.

### Creation of Opportunities in Acumatica ERP

In Acumatica ERP, an opportunity represents a potential, ongoing, or closed deal with a new or existing customer. An opportunity record, which is created on the *Opportunities* (CR304000) form, has a variety of settings, such as the prospect or customer’s contact information, the financial and shipping information, the emails and activities related to an opportunity, and the associated quotes, sales orders, and invoices. With these settings and the related documents, you can easily keep track of and update the most important information about the deal, as described in *Settings of an Opportunity* . Each opportunity must belong to an opportunity class, which gives you the ability to use the opportunity workflow and stages, as described in *Managing Opportunities: Opportunity Stages*.

An opportunity can be created in any of the following ways:

- On the *Leads* (CR301000) form if you click **Actions > Convert to Opportunity** for a selected lead: When the lead confirms the interest to buy, you can convert it to an opportunity and create an opportunity record in the system, as described in *Qualifying Leads (Sales)*. As a rule, during lead conversion, you create a contact and a business account (if they have not yet been created in the system), which the system associates with the sales-qualified lead (SQL). Creation of a business account may be required or optional depending on the setting on the *Lead Classes* (CR207000) form: If the **Require Account for Conversion to Opportunity** check box (**Conversion Settings** section of the **Details** tab) is selected, a business account must be created before the lead is converted to an opportunity.

The activities associated with the lead and listed on the **Activities** tab of the *Leads* form become associated with the newly created opportunity, and you can track the history of communication with the lead, from creation in the system to conversion to an opportunity.

- By manually entering opportunity data on the *Opportunities* form: For an existing customer, you can create an opportunity and associate the opportunity with a contact and business account that have already been created in the system. For a new customer, you can specify contact information on the **Contact Info** tab of the same form; you can then create an associated contact or both a business account and a contact by clicking **Actions > Create Contact** or **Actions > Create Account**, respectively.
- By using the Acumatica mobile app: For an existing customer, you can create an opportunity and associate the opportunity with a contact and business account that have already been created in the system.
- By using an import scenario to import a list of opportunities on the *Import by Scenario* (SM206036) form: You can use an import scenario if you want to import opportunities from a legacy CRM system.
- On the **Opportunities** tab of the *Contacts* (CR302000) form if you click **Add New Opportunity** on the table toolbar: You may want to create an opportunity on this tab if you are viewing this form and need to create an opportunity on the fly or if your company does not use business accounts.
- On the **Opportunities** tab of the *Business Accounts* (CR303000) form for the business accounts of the *Business Account* and *Customer* types if you click **Add New Opportunity** on the table toolbar.
- On the **Opportunities** tab of the *Marketing Campaigns* (CR202000) form if you click **Add New Opportunity** on the table toolbar.
- By using the Acumatica add-in for Outlook based on the details of the selected email recipient or sender.

## Processing of an Opportunity Through States

As an opportunity is being processed by a sales team, it progresses through various states. Each opportunity state is represented by the status displayed in the **Status** box in the Summary area of the *Opportunities* (CR304000) form.

In Acumatica ERP, an opportunity may be assigned one of the following statuses:

- *New*: The opportunity has been created, but no work has been done on it yet.
- *Open*: The opportunity is being worked on by a sales team.
- *Won*: The deal has been successfully closed.
- *Lost*: The deal has been canceled.

You can use the following actions on the **Actions** menu on the form toolbar of the *Opportunities* form to move an opportunity through states:

- **Open**: Opens the **Details** dialog box, where you select the reason and the stage for opening the opportunity and then you confirm the action. The status of the opportunity will be changed to *Open*. This action is available when the status of the opportunity record is *New*.

- **Close as Won**: Opens the **Details** dialog box, where you select the reason and the stage for winning the opportunity and then you confirm the action. The status of the opportunity will be changed to *Won*. This action is available when the status of the opportunity record is *New* or *Open*.

- **Close as Lost**: Opens the **Details** dialog box, where you select the reason and the stage for closing the opportunity as lost and then you confirm the action. The status of the opportunity will be changed to *Lost*. This action is available when the status of the opportunity record is *New* or *Open*.

As you move the opportunity through states, you can select between various stages. For details, see *Managing Opportunities: Opportunity Stages*.

A system administrator can configure notifications related to opportunity states. For more information, see *Business Events: a Data Entry Form as a Source*.

## Settings of an Opportunity

When an opportunity has been created, you can use and modify (if applicable) the settings on the *Opportunities* (CR304000) form. You can do the following:

- On the **Activities** tab, add and work with emails, tasks, and activities associated with an opportunity. For details, see *Managing Emails and Activities*.

- On the **Document Details** tab, specify the details of the products or services (such as the specific inventory items, quantities, and prices) that are to be sold to a customer. For details, see *Managing Opportunities: Products and Services in an Opportunity*.

- On the **Details** tab, view or modify the CRM-related settings, such as the workgroup, the source settings, and additional settings, such as branch or tax zone, that can be associated with the business account specified for the opportunity or with the selling branch.

- On the **Quotes** tab, view and add any sales quotes and project quotes associated with the opportunity. For details, see *Managing Opportunities: Sales Quotes*.

- On the **Contact Info** tab, view and modify the customer's contact information. For details, see *Synchronization of Contact and Address Settings in Opportunities, Contacts, and Business Accounts*, *Address Validation Through a Third-Party Provider*, and *Address Enrichment Through a Third-Party Provider*.

- On the **Shipping Info** tab, view and modify the customer's shipping information. For details, see *Shipping Settings in Opportunities*.

- On the **Attributes** tab, view the list of attributes, which may be used to help your company manage specific information useful for its business, such as the industry or number of employees. For details, see *Attributes* and *User-Defined Fields*.

- On the **Relations** tab, find the information about the lead that has been converted to this opportunity (if applicable), and view and add any related entities, such as the contacts or business accounts associated with an opportunity.

- On the **Tax Details** tab, view the information the system has added about taxes related to the products or services that are to be sold to the customer. For details, see *Taxes*. The settings on this tab depend on location settings. For details, see *Customers: Customer Locations*.

- On the **Discount Details** tab, review the system-added information about discounts related to the products or services that are to be sold to the customer. This tab is available only if the *Customer Discounts* feature is enabled on the *Enable/Disable Features* (CS100000) form.

- On the **Orders** tab, view information about sales orders associated with the opportunity. For details, see *Managing Opportunities: Sales Orders*.
- On the **Invoices** tab, see the list of invoices associated with the opportunity. For details, see *Managing Opportunities: Invoices*.

### Synchronization of Contact and Address Settings in Opportunities, Contacts, and Business Accounts

In Acumatica ERP, contact and address settings in opportunities, contacts, and business accounts are synchronized by default. The contact information from the business account or contact specified in the Summary area of the *Opportunities* (CR304000) form is displayed as read-only by default, but it can be modified if you select the **Override** check box on the **Contact Info** tab.

> With the **Override** check box selected on the **Contact Info** tab of the *Opportunities* form, if you modify the contact or address settings of a contact or business account associated with an opportunity on the *Contacts* (CR302000) or *Business Accounts* (CR303000) form, the settings displayed on the **Contact Info** tab of the *Opportunities* form will not be changed.

Also, if you select a different business account for an opportunity, you can replace the existing contact settings specified on the **Contact Info** tab of the *Opportunities* form with the new settings of the contact associated with the newly selected business account. The system displays the warning message left of the **Contact** box in the Summary area: *The contact does not belong to the selected business account*. You can select a new contact from the list of the contacts associated with the selected business account.

The synchronization or overriding of settings applies to all the settings on the **Contact Info** tab of the *Opportunities* form.

### Address Validation Through a Third-Party Provider

If the *Address Validation Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form (in the *Third Party Integrations* group of features) and an address validation provider is configured on the *Address Providers* (CS103000) form, you can click **Actions > Validate Addresses** on the form toolbar of the *Opportunities* form to validate the addresses specified for the opportunity through integration with a third-party software or service.

Alternatively, you can run validation for multiple accounts at once, by using the *Validate Addresses* (CR509020) form.

For details on configuring the integration, see *Integrating Acumatica ERP with Address Validation Providers*.

If the specified addresses have been validated, the system selects the **Validated** check boxes on the **Contact Info** tab (**Address** section) and the **Shipping Info** tab (**Ship-To Address** section). These check boxes appear on the form only if the *Address Validation Integration* feature is enabled on the *Enable/Disable Features* form.

### Address Enrichment Through a Third-Party Provider

With the address enrichment functionality, you can add a new address, update an existing address, and fill in the missing address information in a record, such as a lead, contact, business account, or opportunity. This functionality is available if the *Address Lookup Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form (in the *Customer Management* group of features) and an address provider is configured on the *Address Providers* (CS103000) form. As a result, you can use the address provider to specify addresses on all forms that have address settings (if applicable).

You can add address settings based on the company name, for example, of a lead. On the *Leads* (CR301000) form (in the **Address** section of the **Contact Info** tab), the **Address Lookup** button has been added. The button is displayed instead of the **View on Map** button if the *Address Lookup Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form. When you click the **Address Lookup** button, the **Address Lookup** dialog box opens, in which you can find the company location details. For details, see *Integration with Web Map Services*.

## Shipping Settings in Opportunities

When you create an opportunity on the *Opportunities* (CR304000) form, the system searches for the following shipping settings until it finds the data and populates the **Shipping Info** tab with the first data it finds:

1. The primary location specified for the business account associated with the opportunity: The business account is specified in the **Business Account** box and the location is specified in the **Location** box of the Summary area.
2. The main contact information and address of the business account associated with the opportunity: The business account is specified in the **Business Account** box of the Summary area.
3. The contact information and address of the contact associated with the opportunity: The contact is specified in the **Contact** box of the Summary area.
4. The contact information specified on the **Contact Info** tab of the form.

The shipping settings specified on the **Shipping Info** tab are displayed as read-only by default. If you select the **Override Shipping Info** check box on this tab, you can modify the shipping settings. Each time you modify these settings, the applicable taxes are automatically recalculated for the opportunity on the **Tax Details** tab if sales taxes have been configured in the system. For details, see *Taxes*.

If the **Override Shipping Info** check box is selected and you change the business account specified in the Summary area of the *Opportunities* form, the system brings up a dialog box that asks whether you want the specified shipping settings to be replaced with the settings of the new business account. You can choose to keep the previously specified settings; in this case, the **Override Shipping Info** check box remains selected on the **Shipping Info** tab to indicate that these settings differ from those of the contact, business account, or location selected in the Summary area.

With the **Override Shipping Info** check box selected, if you use the *Contacts* (CR302000), *Business Accounts* (CR303000), or *Account Locations* (CR303010) form to modify the contact or address settings for the contact, business account, or location specified for an opportunity, the system does not change the settings on the **Shipping Info** tab on the *Opportunities* form.

## Shipping Settings in Quotes, Sales Orders, and Invoices

The shipping settings specified for an opportunity on the *Opportunities* (CR304000) form are transferred to a sales order, invoice, or quote that you create based on that opportunity.

If a primary quote exists for an opportunity, the shipping settings specified for the primary sales quote are synchronized with the shipping settings specified for the opportunity.

On the *Opportunities* form, if you modify the shipping settings specified for an opportunity that is already associated with a sales order, invoice, or non-primary sales quote, the changes you have made to the opportunity will not be reflected on the settings in the associated document. Similarly, changes in the shipping settings specified for a sales order, invoice, or non-primary sales quote are not reflected on the settings in the associated opportunity.

## Opportunities: To Create an Opportunity Manually

The following activity will help you create an opportunity manually in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have received a phone call from your customer Kevin Grey, who is a buyer at Groceriex, a chain of supermarkets in New York. Kevin would like to extend Groceriex's contract with SweetLife and purchase 50 pounds of each of the following fresh fruits: bananas, pears, oranges, and lemons.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
    - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
    - *Address Lookup Integration* (optional): Is used if you will be adding address or shipment information through a third-party provider (Google Maps or Bing Maps).
- The *GROCERIEX* business account has been created in the system on the *Business Accounts* (CR303000) form and extended as a customer.
- The *Kevin Grey* contact has been created in the system on the *Contacts* (CR302000) form and associated with the *GROCERIEX* business account.
- The *PRODUCT* opportunity class has been created on the *Opportunity Classes* (CR209000) form.
- The *BANANAS*, *PEARS*, *ORANGES*, and *LEMONS* stock items (which hold the settings of one pound of each of these fruits) have been created on the *Stock Items* (IN202500) form.

### Process Overview

In this activity, you will create an opportunity for the existing customer on the *Opportunities* (CR304000) form.

### System Preparation

Before you start creating opportunities manually, you should do the following:

**1.** Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
    - Username: *chubb*
    - Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step: Creating an Opportunity Manually

To manually create an opportunity with Kevin Grey of *GROCERIEX*, do the following:

1. Open the Business Accounts (CR3030PL) form.
2. In the **Business Account** column, click the *GROCERIEX* link to open the business account record on the *Business Accounts* (CR303000) form.

> To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

3. Open the **Opportunities** tab.
4. On the table toolbar, click **Add New Opportunity**.
5. In the Summary area of the *Opportunities* (CR304000) form, which opens in a pop-up window with *GROCERIEX* selected as a business account, do the following:
   a. In the **Class ID** box, select *PRODUCT*.
   b. In the **Stage** box, select *Development*.
   c. In the **Estimation** box, select the estimated date of the deal closure, for example, tomorrow's date.
   d. In the **Subject** box, add `Purchase of fresh fruit`.
6. On the form toolbar, click **Save**.
7. On the form toolbar, click **Open** to indicate in the system that you have started working on the opportunity.
8. In the **Details** dialog box, which opens, click **OK**.
9. On the **Activities** tab, specify the results of your phone discussion with Kevin Grey about the order of fruit:
   a. On the table toolbar, click **Add Activity > Add Phone Call**.
   b. In the *Activity* (CR306010) form, which opens in a pop-up window, do the following:
      1. In the **Summary** box, specify a brief summary of the phone call with Kevin Grey by typing `Purchase of bananas, pears, oranges, and lemons`.
      2. In the text editor area, specify `The shipment should be scheduled for tomorrow morning`.
      3. On the form toolbar, click Save and Close to return to the *Opportunities* form with the opportunity open.
      4. On the **Activities** tab, notice that a row with the *Phone Call* type is added to the table.

**10.** On the **Document Details** tab, add the details of the items to be sold as follows:

  **a.** On the table toolbar, click **Add Row**.

  **b.** In the **Inventory ID** column of the added row, select *BANANAS*.

  **c.** In the **Quantity** column, specify `50`.

  **d.** Repeat the three previous subinstructions to add to the table rows for the *PEARS*, *ORANGES*, and *LEMONS* items, in the quantity of 50 pounds each.

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

You have created an opportunity for the existing *GROCERIEX* customer.

## Opportunities: To Create an Opportunity by Using the Acumatica Mobile App

The following activity will help you create an opportunity by using the Acumatica mobile app.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You are currently on a business trip and cannot use your laptop at the moment. Fred Robinson, a store manager at the Store Cart supermarket, has called you and asked you to place an urgent order for assorted teas (black, fruit, and green), 50 packs of each. You need to create an opportunity in Acumatica ERP on the fly.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
  - *Address Lookup Integration* (optional): Is used if you will be adding address information through a third-party provider (Google Maps or Bing Maps).
- The *STORECART* business account has been created in the system on the *Business Accounts* (CR303000) form and extended as a customer.
- The *Fred Robinson* contact has been created in the system on the *Contacts* (CR302000) form and associated with the *STORECART* business account.

## System Preparation

Before you start creating a new opportunity in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating an opportunity in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.

   > The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see *Setting Up an HTTPS Service in Web Server (IIS)*.

## Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create an opportunity for an existing customer by using the Acumatica mobile app.

## Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.
2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).
3. Optional: In the **Account Name** box, specify the name of the user account.
4. Tap **Next**.
5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

## Step 2: Creating an Opportunity by Using the Acumatica Mobile App

To create an opportunity with the contact *Fred Robinson* of the *STORECART* customer by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.
2. Tap the **Opportunities** tile.
3. On the Opportunities screen, tap the Add Record button.

   The **Summary** tab opens.

4. Specify the settings as follows:
   - **Class ID**: Select *Product Sales*.
   - **Subject**: Type `Sale of assorted teas, black, fruit, and green.`

- **Stage**: Select *Development*.
- **Business Account**: Select *STORECART*.

5. Tap the Save button to save the opportunity.
6. Tap the More button to open the Actions menu.
7. On the Actions menu, tap **Open**. This expands the **Details** group of elements.
8. In the **Details** group of elements, do the following:
   a. In the **Reason** box, select *In Progress*.
   b. In the **Stage** box, select *Negotiation*.
   c. Click **OK**.
9. On the **Details** tab, do the following:
   a. Tap the Add Record button.
   b. In the **Inventory ID** box, select *BLACKTEA06*.
   c. In the **Quantity** box, type 50.
   d. Repeat the three previous subinstructions to add the *FRUITTEA12* and *GREENTEA06* items to the opportunity.
   e. Tap the Back button to open the list of items on the **Details** tab.
   f. Tap the Save button to save your changes to the opportunity.

# Lesson 10.2: Assigning Opportunities to Owners and Workgroups

## Assigning Opportunities to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the customer management workload within the company. You can use assignment maps to indicate to the system how to assign records —such as leads, opportunities, or cases—to individuals or groups of people (that is, to owners or workgroups). This topic provides information about assigning opportunities to owners and workgroups one by one or through mass processing.

### Learning Objectives

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

- For an opportunity class, specify how the system determines the default owner it assigns to new opportunities of the class
- Assign an opportunity manually to a particular owner

- Assign a selected group of opportunities to owners or workgroups by using an opportunity assignment map

## Applicable Scenarios

You may want to learn how to assign opportunities to owners and workgroups in scenarios that include the following:

- You need to have the system automatically assign opportunities to salespersons when leads are converted to opportunities.
- You need to manually assign or reassign an opportunity to another owner or workgroup.
- You do not work with leads in your system and need to assign opportunities to the appropriate owners, workgroups, or both without lead conversion.

## Assignment of Opportunities to Owners and Workgroups in Acumatica ERP

In Acumatica ERP, you can easily base the rules for opportunity assignment on company policies because opportunities can be assigned to owners or workgroups in many different ways, based on the settings and attributes of the opportunity records being assigned. You can assign opportunities manually or automatically, through conversion of a lead to an opportunity.

You can automatically assign an opportunity to an owner by converting a lead to an opportunity if a default owner has been selected in the associated opportunity class.

You can cause the system to automatically assign opportunities to owners by specifying a setting for each opportunity class that determines how the default owner is assigned to new opportunities of the class. On the **Details** tab of the *Opportunity Classes* (CR209000) form for the opportunity class, you select one of the following options in the **Default Owner** box, and the system specifies the default owner of a new opportunity of the class in the **Owner** box of the *Opportunities* (CR304000) form:

- *Do Not Change*: The current owner of the opportunity, if any
- *Creator*: The user that created the opportunity
- *Assignment Map*: A user determined by the assignment map you specify
- *From Source Entity*: The owner specified for the contact or business account from which the opportunity was created, if the opportunity was created in this way

If you want the system to distribute opportunities by using an assignment map, you must perform two preliminary tasks. You first must create a company tree on the *Company Tree* (EP204061) form, as described in the following section. Then you need to create the needed map for the automatic assignment of opportunities by using the *Assignment Maps* (EP205010) form.

You can manually assign opportunities individually or in groups. When you create or edit an opportunity on the *Opportunities* form, you can select an owner in the **Owner** box of the Summary area. You can also manually change the owner of an opportunity that has been manually or automatically assigned. You can assign groups of opportunities that do not have owners specified by using the *Assign Opportunities* (CR503110) mass-processing form. On this form, you can assign selected opportunities or all opportunities that do not have owners, and the system uses the opportunity assignment map specified on the *Customer Management Preferences* (CR101000) form to determine the owners of the opportunities.

## The Company Tree and Workgroups

Maintaining and using a functional organizational chart in an ERP system can facilitate the assignment of work and approvals for optimal collaboration within teams and smoother workflows.

In Acumatica ERP, a company tree is a hierarchical structure that contains groups of people, their roles, and chains of assignments and approvals. A company tree may include both the company's organizational chart with different levels of management and a hierarchy of groups representing real business relations and functions.

On the *Company Tree* (EP204061) form, you can easily create a hierarchy of groups for approvals or assignments, and include the same people or groups of people in different workgroups. Thus, users can participate in multiple workflows. You can use approvals for cross-department projects, which have a manager and project participants that may belong to different company departments but be members of the same chain of approvals. We recommend using a company tree to speed and streamline your assignments and approvals.

## Assignment of Opportunities by Using Opportunity Classes

As noted previously, when you create or modify an opportunity class on the *Opportunity Classes* (CR209000) form, you can specify how the system automatically assigns the owner to newly created opportunities of the class by selecting the appropriate option in the **Default Owner** box on the **Details** tab (**Data Entry Settings** section). Based on the selected option for the opportunity class, when this opportunity class has been selected for an opportunity in the **Class ID** box (Summary area) of the *Opportunities* (CR304000) form, the system determines the default owner of this opportunity and inserts the appropriate employee name in the **Owner** box in the Summary area of the form.

In the **Default Owner** box of the *Opportunity Classes* form, you select one of the following options for the opportunity class:

- *Do Not Change*: If the owner has been specified in the **Owner** box of the *Opportunities* form for the opportunity, and you change the opportunity class in the **Class ID** box of the Summary area, the system does not clear or change the owner for this opportunity. If no owner has been specified for the opportunity, the system leaves the **Owner** box blank.

- *Creator*: When an opportunity of the class is created, the user who created the opportunity record is assigned as its owner by default.

- *Assignment Map*: When an opportunity of the class is created, based on the assignment map (which you must also select in the **Assignment Map** box for the class), the system determines the default owner or workgroup (or both) and inserts them on the *Opportunities* form for the new opportunity. The system inserts the workgroup of the opportunity, if applicable, on the **Details** tab. If you are assigning opportunities based on assignment maps, you can use a different assignment map for each opportunity class, if needed.

- *From Source Entity*: When an opportunity of the class is created, if it is created from another entity —such as a lead, contact, or business account—the opportunity inherits the owner and workgroup (if specified) from this contact or business account. This default owner is assigned if you create an opportunity from a contact on the *Contacts* (CR302000) form or from a business account on the *Business Accounts* (CR303000) form.

We recommend assigning opportunities by converting leads to opportunities or, if you manually create opportunities, by using opportunity classes because the system assigns an opportunity to an owner each time a new opportunity record is created.

## Assignment of Opportunities by Using Assignment Maps

You can use the assignment map functionality to assign opportunities automatically through the use of opportunity classes or manually when you mass-assign opportunities.

An assignment map is a set of rules, actions related to rules, and conditions that the system can use for assigning a record or a number of records for processing to a particular individual or a group of people. An assignment map may include any number of rules, which are executed sequentially. Each rule in an assignment map includes conditions and actions to be performed if the conditions are met. You create assignment maps on the *Assignment Maps* (EP205010) form as follows (For detailed instructions on configuring assignment maps, see *Configuring Assignment Maps*.):

1. On the **Rules** tree, you add new rules.
2. On the **Conditions** tab, you add rule conditions that assignment criteria should meet.
3. On the **Rule Actions** tab, you select an owner or a workgroup (or both).

Once an assignment map for opportunities is created, you can do either or both of the following:

- Specify the assignment map on the *Opportunity Classes* (CR209000) form for the opportunity class if you have selected *Assignment Map* in the **Default Owner** box on the **Details** tab: Each new opportunity of the class will be assigned to a default owner on the *Opportunities* (CR304000) form according to this map. A user can change the default owner as needed.
- Specify the assignment map on the *Customer Management Preferences* (CR101000) form in the **Opportunity Assignment Map** box of the **General Settings** tab (**Assignment Settings** section): Existing opportunities that do not have owners will be assigned to owners based on this map as soon as you have assigned the opportunities by using the *Assign Opportunities* (CR503110) mass processing form.

> If an assignment map is specified for the applicable opportunity class on the *Opportunity Classes* form, it overrides the assignment map specified on the *Customer Management Preferences* (CR101000) form. Opportunities of the class will be assigned to owners based on the assignment map from the opportunity class.

## Execution Errors Related to Mass-Assignment of Opportunities

If an assignment map contains errors (for example, a workgroup contains an employee who has quit the company and cannot be assigned to any records), and you have processed any opportunities that should be assigned according to this assignment map by using the *Assign Opportunities* (CR503110) form, the system will list these errors in the **Processing** dialog box. You can view the error by clicking the More button on the **Errors** tile. In the **Message** column, the system displays the text of the error message.

## Notifications About Assigning an Opportunity to an Owner

In Acumatica ERP, an administrator can set up email notifications on the *Business Events* (SM302050) form so that if a user is assigned to a new opportunity, this user receives a notification by email, by SMS, or in the Acumatica mobile app. For details, see *Business Events*.

## Assigning Opportunities to Owners and Workgroups: Process Activity

The following activity demonstrates how to assign opportunities to owners and workgroups and how to set up the system to assign opportunities to owners automatically. The activity will show you how to define an opportunity class so that opportunities of the class are assigned to their creators by default. You will also practice manually assigning opportunities to the appropriate owners, both for an individual opportunity and by using the mass processing form to assign multiple users to the needed owners.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company, and you are going on vacation. You need to temporarily assign the opportunity you are working on with the *Food Clever* customer to your colleague, Pam Brawner.

You will also change the *SERVICE* opportunity class so that the user that creates a new opportunity is assigned to be its owner. Finally, you will mass-assign the unassigned opportunities of the *PRODUCT* and *PROJECT* opportunity classes to workgroups.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- On the *Company Tree* (EP204061) form, the company tree has been configured. It includes the *Product Sales* and the *Service Sales* workgroups, as well as the users in the *Sales* department.
- The *Pam Brawner* employee has been created on the *Employees* (P203000) form, and included in the *Sales* department on the *Company Tree* form.
- The *PRODUCT*, *PROJECT*, and *SERVICE* opportunity classes have been created on the *Opportunity Classes* (CR209000) form.
- On the *Assignment Maps* (EP205010) form, the *Opportunity Assignment Map* has been created. According to the rules (and their conditions and actions) specified in this assignment map, the opportunities of the *PRODUCT* opportunity class are assigned to the *Product Sales* workgroup in the SweetLife *Sales* department, and the opportunities of the *PROJECT* opportunity class are assigned to the *Project Sales* workgroup in the *Sales* department.
- On the *Customer Management Preferences* (CR101000) form, (in the **Opportunity Assignment Map** box of the **Assignment Settings** section of the **General Settings** tab), the *Opportunity Assignment Map* assignment map has been specified. The system will use this assignment map during the process of mass-assigning opportunities.
- The *STORE* business account class has been created on the *Business Account Classes* (CR208000) form.

- The *DEFAULT* customer class has been created on the *Customer Classes* (AR201000) form.
- The *FOODCLVR* business account record has been created in the system on the *Business Accounts* (CR303000) form and extended as a customer.
- The *Fiona Peters* contact has been created in the system on the *Contacts* (CR302000) form and associated with the *FOODCLVR* business account.
- The opportunity with the *Purchase of juicers by Food Clever* **Subject**, for the sale of juicers to the *Food Clever* customer, has been created on the *Opportunities* (CR304000) form and assigned to the sales manager, *David Chubb*.

## Process Overview

In this activity, you will do the following:

1. On the *Opportunities* (CR304000) form, manually assign a particular opportunity to an owner.
2. On the *Opportunity Classes* (CR209000) form, specify how the system assigns the default owner of opportunities of a particular class.
3. On the *Assign Opportunities* (CR503110) form, assign selected opportunities to owners.

## System Preparation

Before you start assigning opportunities to owners, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Assigning an Opportunity to an Owner

To manually assign an opportunity to another owner, do the following:

1. Open the Opportunities (CR3040PL) form.
2. In the **Opportunity ID** column, click the link for the opportunity that has *Purchase of juicers by Food Clever* in the **Subject** box to open the opportunity with the *Food Clever* customer on the *Opportunities* (CR304000) form.
3. In the **Owner** box of the Summary area, notice that *David Chubb* is selected; select *Pam Brawner*.
4. On the form toolbar, click **Save**.

You have manually assigned an opportunity to another owner.

## Step 2: Specifying a Default Owner for New Opportunities of the Class

In this step, you will specify the owner of a new opportunity of the *SERVICE* opportunity class as its creator.

To specify the default owner of an existing opportunity class and make sure the owner is assigned correctly to a new opportunity of the class, do the following:

1. Open the Opportunity Classes (CR2090PL) form.
2. In the **Class ID** column, click the *SERVICE* link to open the opportunity class record on the *Opportunity Classes* (CR209000) form.
3. On the **Details** tab (**Data Entry Settings** section), in the **Default Owner** box, select *Creator*.
4. On the form toolbar, click **Save**.
5. Make sure that the option that you have just specified assigns new opportunities to owners correctly by doing the following:
    a. Open the Opportunities (CR3040PL) form.
    b. On the form toolbar, click **New Record**. A new opportunity record opens on the *Opportunities* (CR304000) form.
    c. In the **Class ID** box of the Summary area, select *SERVICE*.
    d. In the **Owner** box, notice that *David Chubb* is inserted in the box. Because this is the user account to which you are signed in and you are the creator of the opportunity, the setting of the opportunity class is causing the system to assign the owner appropriately.
    e. In the **Subject** box, type `Juicer repair for Food Clever store`.
6. On the form toolbar, click **Save**.

You have specified how the system determines the default owner for opportunities of the *SERVICE* opportunity class and then created a new opportunity to test the setting. The system has correctly inserted the default owner for the new opportunity. Each time a user creates an opportunity of the *SERVICE* opportunity class, the system will insert the employee name of the creator of the opportunity as the owner of the opportunity.

## Step 3: Assigning Multiple Opportunities to Workgroups

Suppose that at the request of the director of your sales department, you need to regularly mass-assign the unassigned opportunities of the *PRODUCT* and *PROJECT* opportunity classes to owners. The system will assign these opportunities by using the *Opportunity Assignment Map*, which has been specified on the *Customer Management Preferences* (CR101000) form. Based on this assignment map, the system will assign the opportunities of the *PRODUCT* opportunity class to the *Product Sales* workgroup and the opportunities of the *PROJECT* class to the *Project Sales* workgroup.

To mass-assign multiple opportunities to workgroups, do the following:

1. Open the *Assign Opportunities* (CR503110) form.
2. In the table, click the header of the **Owner** column.

    > If you need to change the order of columns in any table, you can drag a column by its header to the new place in the table.

3. In the Sorting and Filtering Settings dialog box, which opens, do the following to filter opportunities with no owner specified:

   a. Select the *Is Empty* filter condition.
   b. Click **OK**. The system closes the dialog box and applies the filter.

4. On the form toolbar, click the **Filter Settings** button.
5. In the **Filter Settings** dialog box, which opens, do the following to list the opportunities of the *PRODUCT* and *PROJECT* opportunity classes on the form, so that you can process these opportunities:
   a. Click **Add Row** to add a row to the table.
   b. In the **Property** box, select *Class ID*.
   c. In the **Condition** box, select *Equals*.
   d. In the **Value** box, select *PRODUCT*.
   e. In the **Operator** box, select *Or*.
   f. Click **Add Row** to add another row to the table.
   g. In the **Property** box, select *Class ID*.
   h. In the **Condition** box, select *Equals*.
   j. In the **Value** box, select *PROJECT*.
   k. Click **Apply** to apply the filter settings to the table and close the dialog box.
6. On the form toolbar, click **Process All**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning the opportunities.

   > If an assignment map contains errors, the system will list these errors in the **Processing** dialog box. You can view the errors by clicking the More button on the **Errors** tile: In the **Message** column, the system displays the text of each applicable error message.

7. Click **Close** to close the dialog box and return to the form. In the **Workgroup** column, you can see the names of the workgroups to which the system has assigned the opportunities: *Product Sales* and *Project Sales*.

You have assigned the unassigned opportunities to workgroups according to the rules specified in the *Opportunity Assignment Map* assignment map on the *Assignment Maps* (EP205010) form.

# Lesson 10.3: Managing Events

In this lesson, you will learn how to create an activity of the *Event* type. For more information about activities, see *Lesson 6.2: Managing Emails and Activities* and *Lesson 9.4: Managing Tasks*.

## Emails and Activities: Events

In Acumatica ERP, an event is an internal scheduled occurrence with an associated start time, date, and duration, such as a meeting or a conference call. You can create events and invite other users to attend them, with invitations sent automatically by email. Also, you can receive notifications about events created by other users.

You can view the events defined in Acumatica ERP by using the *Events* (EP404100) form. If you are an attendee to an event, not all controls will be available to you on this form; for example, you cannot cancel or reschedule the event.

By using the *Event and Task Categories* (EP204040) form, you can create a list of event categories and provide a color code for each category.

On the *Event Setup* (EP204070) form, you can configure event scheduling and rescheduling templates, as well as email templates for automatic notifications about events to be held by employees. Automatic notifications can be configured to use the simple built-in functionality of notifications or to use notification templates that allow email personalization. If notifications are to be based on templates, the templates will be used for all users who create events.

On the *Event Attendee Statuses* (EP204050) form, you can add, view, edit, and delete statuses to be used for events.

## Emails and Activities: To Create an Event

The following activity will demonstrate how to create an event.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have sent an email to Donna Coleman, a buyer at Yummy Supplies supermarket, with the detailed price list of the SweetLife Fruits & Jams. Donna studied the price list and would like to discuss the company products and services. Before contacting Donna, you need to consult with your colleague Joanne Simpson about new products and services that have been added to the price list in the beginning of the year.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, the *Donna Coleman* lead has been added to the system.

### Process Overview

In this activity, you will create an event on the **Activities** tab of the *Leads* (CR301000) form.

### System Preparation

Before you start creating an event, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

### Step: Creating an Event

To create an event, do the following:

1. In the **Display Name** column on the Leads (CR3010PL) form, click the *Donna Coleman* link.

   > To search for a record in a list of records, you can enter a keyword or phrase in the Search box of the table toolbar. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

2. On the *Leads* (CR301000) form, which opens, open the **Activities** tab.
3. On the table toolbar, click **Add Event**. The *Event* (CR306030) form opens in a pop-up window.
4. On the **Details** tab, specify the following settings:
   - **Summary**: `Discussing products and services for Donna Coleman from Yummy Supplies`
   - **Location**: `SweetLife Office`
   - **Start Time**: The date and time when the event will start
   - **End Time**: The date and time when the event will end
5. On the **Attendees** tab, add the `Joanne Simpson` employee as follows:
   a. On the table toolbar, click **Add Row**. The system adds a new row to the table.
   b. In the **Name** box, select *Joanne Simpson*.
6. On the form toolbar, click **Save**.
7. On the table toolbar of the **Attendees** tab, click **Invite All**. A row with the *Event* type is added to the table on the **Activities** tab of the *Leads* (CR301000) form.
8. Close the form.

You have created an event.

## Lesson 10.4: Managing Opportunities

## Managing Opportunities: General Information

Acumatica ERP helps you manage your opportunities for deals by using the workflow of opportunity management. With this workflow, you can estimate revenue by using opportunity stages and create documents associated with opportunities, such as sales quotes, sales orders, service orders, and invoices.

### Learning Objectives

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

- Make optimal use of the opportunity management capabilities of Acumatica ERP
- Use opportunity stages to reflect in the system the advancement of an opportunity through your sales pipeline
- Add products to an opportunity
- Create a sales quote
- Send the sales quote to a customer
- Select a primary quote for an opportunity
- Close an opportunity as won
- Extend a business account of a prospect to be a customer
- Create a sales order for an opportunity
- Send a sales order to a customer

### Applicable Scenarios

You may want to learn how to manage opportunities in Acumatica ERP in scenarios that include the following:

- You sell products or services that require a continuous sales cycle, which may include product demos and the preparation of sales quotes, and you need to use the workflow of opportunity management.
- You need to create an opportunity-based sales order and send it to your customer.

### Opportunity Management in Acumatica ERP

In Acumatica ERP, you can manage opportunities, including those for products or services that require a continuous sales cycle. During the sales cycle, an opportunity progresses through stages. You can define the needed opportunity stages to fit your company's business processes. Based on the defined opportunity stages, you specify the current stage of an opportunity in the **Stage** box of the Summary area on the *Opportunities* (CR304000) form. For details, see *Managing Opportunities: Opportunity Stages*.

You can customize your opportunity management workflow so that an opportunity can be moved to a particular stage based on particular conditions. For example, an opportunity can be advanced to the *Qualification* stage only if the customer's budget for the opportunity has been specified in the system.

Depending on your company's sales processes, you can manage an opportunity by performing the following steps:

1. Creating an opportunity through lead conversion or manually: For details, see *Qualifying Leads (Sales)* and *Creating Opportunities*. You use the *Opportunities* (CR304000) form for tracking the settings and details related to the opportunity.

   During the creation of the opportunity or at any later time, you can enter the list of products and services that your company is offering to the prospect or customer, including the prices for these products and services, on the **Document Details** tab of this form. You can apply discounts and calculate fees and taxes. For details, see *Managing Opportunities: Products and Services in an Opportunity*.

2. Creating activities associated with an opportunity: In Acumatica ERP, you can track the prospect- or customer-related activities you perform to help your prospect or customer evaluate your products or services and make a decision to buy them. These activities may include creating emails, making phone calls, conducting meetings, or creating product demos to help your customer make an informed buying decision. You can create and track these activities by using the **Activities** tab of the *Opportunities* form, as described in *Managing Emails and Activities*.

3. Creating a sales quote: From the *Opportunities* form, you can create a sales quote based on the opportunity, which causes the system to copy the relevant settings, including the products and services on the **Document Details** tab, to the *Sales Quotes* (CR304500) form. You can then finish preparing the sales quote and send it to your prospect or customer, as described in *Managing Opportunities: Sales Quotes*. If your company's sales processes include the approval of sales quotes, you can approve the needed sales quote by using an approval map, as described in *Managing Assignment and Approval Maps*.

   Then you discuss the offer with the prospect or the customer until it has been agreed upon or declined. If you need to create multiple sales quotes, you can mark one of them as a primary quote; the system uses the primary sales quote as the source of particular settings of the opportunity, such as the list of products, the currency and currency rate, the tax details, and the discount details.

4. Closing the opportunity: The opportunity can be closed as won or lost. For details, see *Managing Opportunities: To Create an Opportunity-Based Sales Order*.

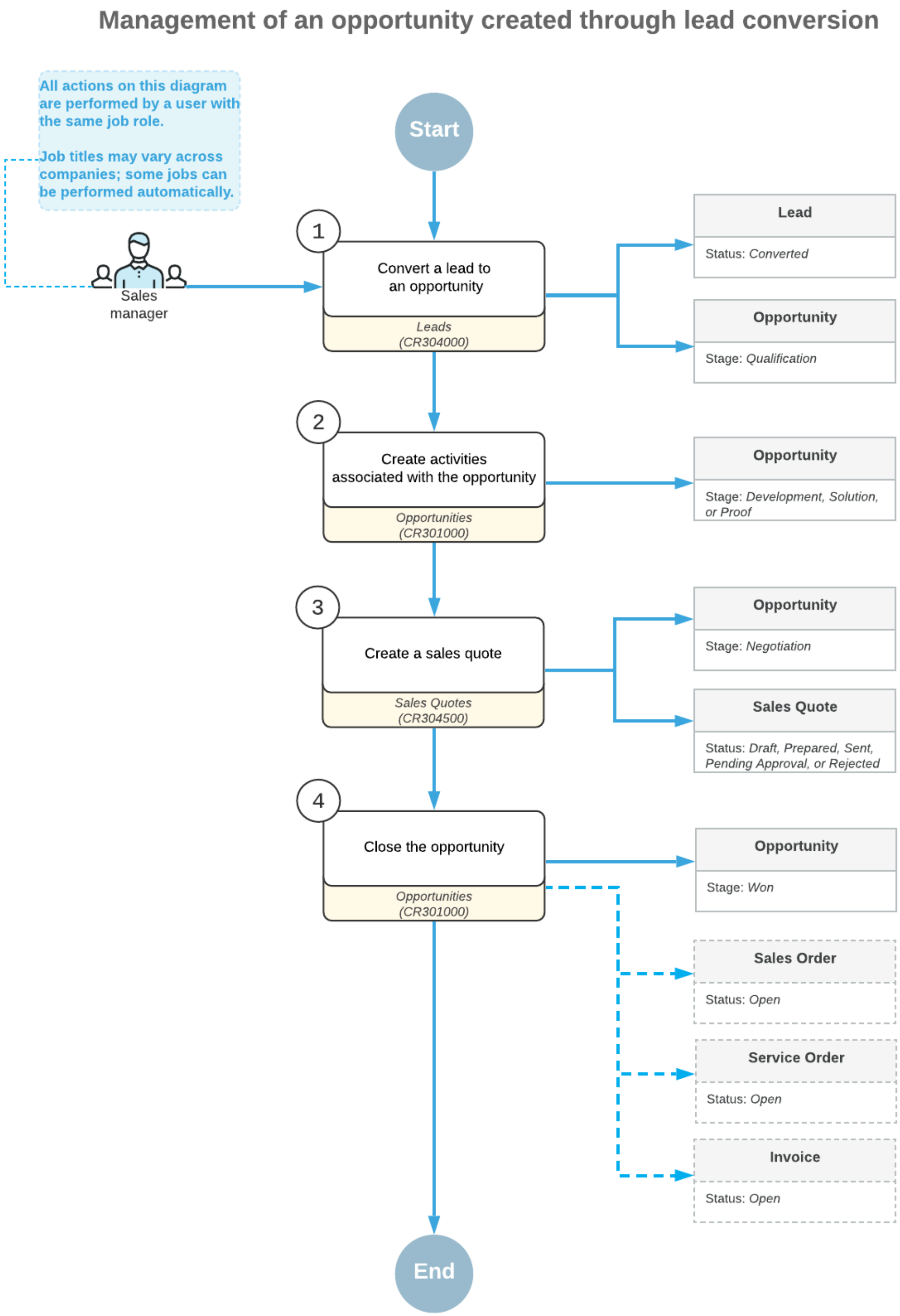
5. Creating a sales order based on the opportunity (optional): For details, see *Managing Opportunities: Sales Orders*.

6. Creating a service order based on the opportunity (optional): For details, see *Processing Service Orders*.

7. Creating an invoice based on the opportunity (optional): For details, see *Managing Opportunities: Invoices*.

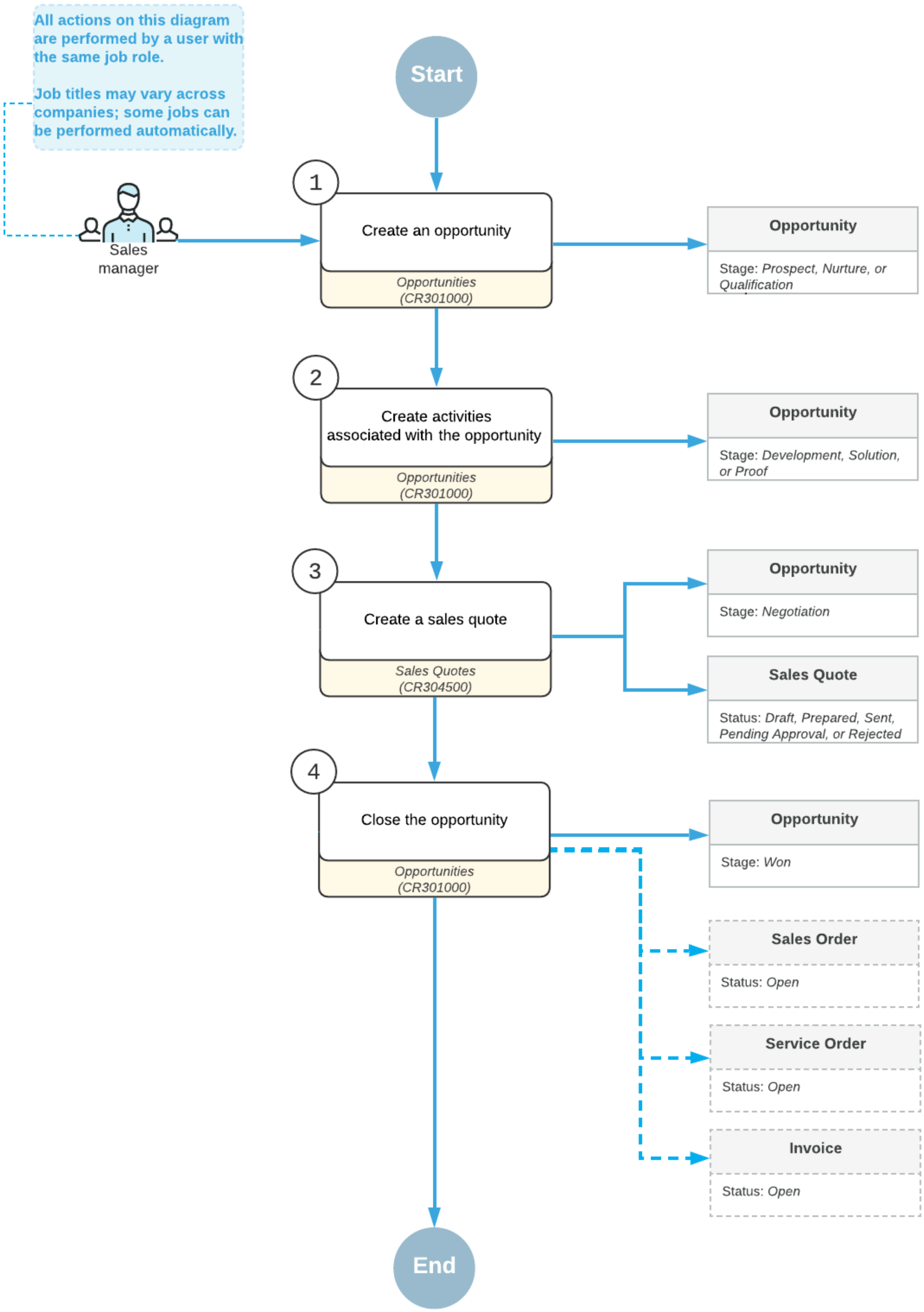
## Workflow of Opportunity Management

The following diagram illustrates the management of an opportunity that has been created through lead conversion.




The following diagram illustrates the management of a manually created opportunity.

## Management of a manually created opportunity



### Template-Based Emails Related to Opportunities

A system administrator can configure Acumatica ERP to automatically send template-based emails related to opportunities. For example, you might set up the system to send an email to the owner of an opportunity about the expiration of this opportunity. For details, see *Business Events: Email Notifications*.

## Managing Opportunities: Opportunity Stages

When an opportunity is processed by a salesperson, it progresses through various stages. At any particular stage, there is a certain probability that the sale can be successfully closed. The assignment of stages to opportunities gives you the ability to estimate future sales revenue at any time. The accuracy of revenue estimation depends heavily on the correct identification of the opportunity stage and on the accuracy of defining the specified probability.

An implementation consultant or system administrator uses the **Stages** tab of the *Opportunity Classes* (CR209000) form to define opportunity stages and their probabilities in your organization. The full list of opportunity stages can be available for selection to all opportunity classes, but every class may have its own set of active stages. For each opportunity class, at least one stage should be active. For details, see *Defining Opportunity Classes*.

You specify the current opportunity stage of an opportunity in the **Stage** box of the Summary area on the *Opportunities* (CR304000) form.

The system offers the following predefined list of opportunity stages:

- *Prospect*: The contact or business account associated with the opportunity is a known prospect, but it is not clear whether this prospect is interested in the offered products or services.
- *Nurture*: A salesperson is collecting information about the prospect or customer's interest in products and services; the salesperson may also be negotiating with the prospect or customer. This stage may be useful if your company decides not to use leads.
- *Qualification*: A salesperson is determining the prospect or customer's interest in purchasing particular products or services.
- *Development*: A salesperson is clarifying the prospect or customer's requirements for products or services, as well as the budget, delivery schedule, and project scope (if applicable).
- *Solution*: A salesperson is negotiating with the prospect about the content of the solution (proposal) and the set of products or services that the prospect or customer wants to buy. The salesperson is creating product demonstrations or other evaluation tools, and the prospect or customer is evaluating the products or services.
- *Proof*: A salesperson has developed a solution (that is, a proposal). The prospect or customer is evaluating the solution. A primary sales quote may be selected at this stage.
- *Negotiation*: A salesperson and the prospect or customer are negotiating prices, discounts, and terms of the proposed deal.
- *Won*: The prospect or customer has accepted the proposal and is ready to sign the contract or place an order (or has already done this). Some companies prefer to advance the opportunity to this stage only after the invoice has been issued, or even after a payment is received.

Depending on your company’s sales processes, any of these stages may be skipped as needed, or new stages can be created. To make a stage inactive, you clear the **Active** check box for the stage on the **Stages** tab of the *Opportunity Classes* form.

## Managing Opportunities: Products and Services in an Opportunity

You can add to an opportunity the products or services that you want to sell to the prospect or customer if the *Inventory* feature has been enabled on the *Enable/Disable Features* (CS100000) form and inventory item records of these products and services have been created on the *Stock Items* (IN202500) or the *Non-Stock Items* (IN202000) form. You add these products or services to the opportunity on the **Document Details** tab of the *Opportunities* (CR304000) form. Based on these products or services, you can create any of the following documents: a sales quote, a sales order, a service order, and an invoice.

The tax details for the products and services specified for the opportunity are inserted by the system on the **Tax Details** tab of the *Opportunities* form if taxes have been configured in your system, as described in *Taxes*.

You can specify the information about discounts in the opportunity on the **Discount Details** tab if the *Customer Discounts* feature is enabled on the *Enable/Disable Features* form. You can create a discount for a customer or a group of customers (which the system will automatically apply), apply a promo code for a discount, or apply a manual discount.

## Managing Opportunities: Sales Quotes

In Acumatica ERP, you can use sales quotes to present to a prospect or customer the details, including prices, of the products and services that your company is offering.

### Creation of Sales Quotes

A sales quote is a document you create in Acumatica ERP on the *Sales Quotes* (CR304500) form to represent an offer made to a particular prospect or customer, which can be based on an opportunity; the sales quote includes a list of products and services offered at specific prices, with specific discounts and terms. You can create sales quotes in the system if the *Sales Quotes* feature is enabled on the *Enable/Disable Features* (CS100000) form.

You can create one sales quote or multiple sales quotes for an opportunity as you negotiate the deal with the prospect or customer. A sales quote can be printed or emailed to the specified customer for review. When the customer accepts an offer, the accepted sales quote must be selected as the primary one.

You can start creating a sales quote in any of the following ways:

- By clicking **Create Quote** on the form toolbar of the *Opportunities* (CR304000) form while viewing the opportunity the quote will be based on. This opens the **Create New Quote** dialog box, where you can specify basic settings. When you click **Create**, the system closes the dialog box and opens the *Sales Quotes* form with applicable settings filled in, so that you can view and edit the created sales quote.
- By clicking **Create Quote** on the table toolbar of the **Quotes** tab on the *Opportunities* form while viewing the opportunity the quote will be based on.
- By clicking **Add New Record** on the form toolbar of the *Sales Quotes* form. In this case, you need to enter the settings of the sales quote.
- By selecting an existing quote and then clicking the **Copy Quote** action, which is available on the **Quotes** tab on the *Opportunities* form and on the **Actions** menu on the form toolbar of the *Sales Quotes* form. This action causes a copy of the selected quote to be created.

The system uses the contact information specified on the **Contact Info** tab of the *Opportunities* (CR304000) form when it generates a new sales quote: The contact settings are inserted in the **Contact Information** and **Address** sections on the **Details** tab of the *Sales Quotes* (CR304500) form.

## Primary Sales Quotes

When a sales quote is created for an opportunity, the system marks this sales quote as primary by selecting the **Primary** check box in the row that has the settings of the sales quote on the **Quotes** tab of the *Opportunities* (CR304000) form and in the Summary area on the *Sales Quotes* (CR304500) form.

If multiple sales quotes are created for an opportunity, one of the sales quotes must be marked as the primary sales quote, which a user can do either during the creation of a quote or by clicking **Mark as Primary** on the *Sales Quotes* (CR304500) form toolbar.

An opportunity uses the primary sales quote as the source of various settings on the *Opportunities* (CR304000) form, such as the list of products and services, the currency and the currency rate, the location, the contact information, the tax details, and the discount details. If a user changes the sales quote marked as the primary sales quote for the opportunity, these settings are changed for the opportunity to those of the new primary sales quote.

## Sales Quote Activities

On the **Activities** tab of the *Sales Quotes* (CR304500) form, a user can create activities associated with the selected sales quote. On the **Activities** tab of the *Opportunities* (CR304000) form, activities related to the selected opportunity are listed, along with activities related to all the sales quotes associated with the opportunity.

## Statuses of a Sales Quote

As you are viewing a sales quote on the *Sales Quotes* (CR304500) form, you can see and change its status in the Summary area. A sales quote can have one of the following statuses:

- *Draft*: The sales quote is being prepared, and its details can be edited.
- *Prepared*: The sales quote is ready to be sent to the customer. The system assigns this status to a sales quote after it has been submitted or, if approval is required for sales quotes, after it has been approved.
- *Sent*: The sales quote has been emailed to the customer.
- *Pending Approval*: The sales quote is pending approval within the company.
- *Rejected*: The sales quote has been rejected by an approver within the company.

You can also see the status of an opportunity's sales quotes on the **Quotes** tab (**Status** column) of the *Opportunities* (CR304000) form.

## Approval of Sales Quotes

Approval of sales quotes can be set up in the system if the *Approval Workflow* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Sales quotes require approval if an approval map for sales quotes has been specified in the **Approval Map** box of the **General Settings** tab (**Quote Approval Settings** section) of the *Customer Management Preferences* (CR101000) form.

A sales quote that is pending approval cannot be modified. An assigned approver can approve or reject the sales quote by clicking **Actions > Approve** or **Actions > Reject** on the form toolbar of the *Sales Quotes* (CR304500) form. After a sales quote has been approved, it can be sent to the customer.

## Emailing of a Sales Quote

A user can send a prepared sales quote to a customer for review by selecting the sales quote and then clicking the **Send Quote** action, which is available on the **Quotes** tab on the *Opportunities* (CR304000) form and on the **Actions** menu on the form toolbar of the *Sales Quotes* (CR304500) form. In this case, an email activity is created, a printable form of the sales quote is attached to the email activity, and the status of the sales quote is changed to *Sent*.

The email is generated automatically in accordance with the mailing settings specified for customer relationship management (CRM) in Acumatica ERP, which can be configured as follows:

1. On the **Mailing Settings** tab of the *Customer Management Preferences* (CR101000) form, all mailings that may be used in the CRM functional area of the system are listed.
2. On the **Mailing Settings** tab of the *Business Account Classes* (CR208000) form, all mailings that may be used for customers of the class are listed. On this form, only a mailing that is listed on the *Customer Management Preferences* form can be selected.
3. On the **Mailing Settings** tab of the *Business Accounts* (CR303000) form, all mailings that may be used for the selected customer are listed. On this form, only a mailing that is listed on the *Customer Management Preferences* form can be selected. If the selected mailing is not listed on the *Business Account Classes* form for the class of the customer account, the **Overridden** check box is selected for this mailing to indicate that the default setting has been modified.

For each mailing, the following settings may be specified:

- The email address from which the mailing will be sent; if none is specified, the system will use the default system email account
- The notification template based on which the email body will be generated
- The printed form that will be attached to the email and the format of the attachment
- The list of recipients

# Managing Opportunities: Sales Orders

The **Document Details** tab of the *Opportunities* (CR304000) form may include detail lines that represent potential sales. A detail line may contain a stock item or a non-stock item, or it may contain no inventory items at all (that is, the **Inventory ID** column may be left blank for the line). For the opportunity, you can create a sales order if the *Inventory and Order Management* group of features is enabled on the *Enable/Disable Features* (CS100000) form and a business account of the *Customer* type has been selected for the opportunity. This sales order will include only the detail lines with inventory items specified. If the opportunity includes no detail lines or only detail lines with the **Inventory ID** column left blank, you cannot create a sales order based on that opportunity.

You can start creating an opportunity-based sales order by clicking **Actions > Create Sales Order** on the form toolbar of the *Opportunities* form. This opens the **Create Sales Order** dialog box, where you can specify basic settings, including which sales order type should be used and whether prices and discounts should be recalculated. When you click **Create**, the system closes the dialog box and opens the *Sales Orders* (SO301000) form with applicable settings filled in, so that you can create a sales order associated with the opportunity. For details, see *Managing Opportunities: To Create an Opportunity-Based Sales Order*.

## Managing Opportunities: Invoices

The **Document Details** tab of the *Opportunities* (CR304000) form may include detail lines that represent potential sales. A detail line may contain a stock item or a non-stock item, or it may contain no inventory items at all (that is, the **Inventory ID** column may be left blank for the line). For the opportunity, you can create an invoice if the *Inventory and Order Management* group of features is enabled on the *Enable/Disable Features* (CS100000) form and a business account of the *Customer* type has been selected for the opportunity. This invoice will include only the detail lines with inventory items specified. If the opportunity includes no detail lines or only detail lines with the **Inventory ID** column left blank, you cannot create an invoice based on that opportunity.

You can start creating an opportunity-based invoice by clicking **Actions > Create Invoice** on the form toolbar of the *Opportunities* form. This opens the **Create New Invoice** dialog box, where you can specify basic settings, including whether prices and discounts should be recalculated. When you click **Create**, the system closes the dialog box and opens the *Invoices and Memos* (AR301000) form with applicable settings filled in, so that you can create an invoice associated with the opportunity.

## Managing Opportunities: To Add Products to an Opportunity

The following activity demonstrates how to add products to an opportunity in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Your customer, the Delicious Energy Restaurant chain, would like to purchase commercial juicers. You have discussed the purchase with Diane Doe, a procurement manager at Delicious Energy Restaurant, and have created the product demo. Now you need to add the details (in this case, products) of this order to the opportunity, which you have created in the system.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- The *CAFE* lead class has been created with the necessary settings and attributes on the *Lead Classes* (CR207000) form.
- The *CAFE* business account class has been created on the *Business Account Classes* (CR208000) form.
- The *PRODUCT* opportunity class has been created on the *Opportunity Classes* (CR209000) form.

- The *Diane Doe* lead has been created on the *Leads* (CR301000) form and converted to an opportunity as follows:
  - The *Purchase of commercial juicers by Delicious Energy* opportunity has been created on the *Opportunities* (CR304000) form.
  - The *DELIENERGY* business account has been created on the *Business Accounts* (CR303000) form.
  - The *Diane Doe* contact has been created in the system on the *Contacts* (CR302000) form and associated with the *DELIENERGY* business account.
- The *DEFAULT* customer class has been created in the system on the *Customer Classes* (AR201000) form.
- The *DELIENERGY* business account has been extended as a customer, with its settings specified on the *Customers* (AR303000) form.
- The *JUICER15* and *JUICER20C* stock items, which hold the settings of two different commercial juicers, have been created on the *Stock Items* (IN202500) form.

## Process Overview

In this activity, you will add products to an opportunity for the existing *DELIENERGY* business account on the **Document Details** tab of the *Opportunities* (CR304000) form.

## System Preparation

Before you start adding products to an opportunity, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step: Adding Products to an Opportunity

You will add to the existing opportunity the details, including prices and discounts, of the juicers in the proposed deal: five of the *JUICER15* commercial juicer, and three of the *JUICER20C* commercial citrus juicer. To add these products to the opportunity in the needed quantities, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of commercial juicers by Delicious Energy* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the *Opportunities* (CR304000) form.
4. On the **Document Details** tab, add products to the opportunity as follows:
   a. On the table toolbar, click **Add Row**.

**b.** In the **Inventory ID** column of the added row, select *JUICER15*.

Notice that the system has filled in the settings for the *JUICER15* inventory item, including the **Tax Category** and **Discount, %** settings.

**c.** In the **Quantity** column, type `5`.

**d.** In the **Discount, %** column, type `5`.

A 5% discount is applied to this detail line.

> If you want to specify a discount amount to be applied to the total amount of all products and services included in the opportunity, select the **Manual Amount** check box in the Summary area of the form, and then type the discount amount in the **Discount** box, which became available for editing when you selected the check box.

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

Notice that the system applied the discount that you have entered and filled in the **Discount Amount** box.

**f.** On the table toolbar, click **Add Row**.

**g.** In the **Inventory ID** column of the added row, select *JUICER20C*.

**h.** In the **Quantity** column, type `3`.

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

You have added the products and the applicable discounts and quantities to the opportunity. You can see the estimated amount for the products in the **Amount** box in the Summary area of the *Opportunities* form. If you create a sales quote for the opportunity, the system will add these products to the sales quote.

## Managing Opportunities: To Create a Sales Quote

The following activity demonstrates how to create a sales quote in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Your customer, the Cuisine Green Cafe chain in New York, would like to purchase juicers, and you have discussed the purchase with Roland Mercier, the cafe manager. You have created an opportunity in the system and added the details of the juicers to the opportunity. Now you need to create a sales quote to confirm the purchase with the customer and be sure both organizations are in agreement.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- The *CAFE* lead class has been created on the *Lead Classes* (CR207000) form.
- The *CAFE* business account class has been created on the *Business Account Classes* (CR208000) form.
- The *PRODUCT* opportunity class has been created on the *Opportunity Classes* (CR209000) form.
- The *Roland Mercier* lead has been created on the *Leads* (CR301000) form and converted to an opportunity as follows:
  - The *Purchase of juicers by Cuisine Green Cafe* opportunity has been created on the *Opportunities* (CR304000) form.
  - The *GREENCAFE* business account has been created on the *Business Accounts* (CR303000) form.
  - The *Roland Mercier* contact has been created in the system on the *Contacts* (CR302000) form and associated with the *GREENCAFE* business account.
- The *DEFAULT* customer class with the necessary settings and attributes has been created in the system on the *Customer Classes* (AR201000) form.
- The *GREENCAFE* business account record has been extended as a customer, with its settings specified on the *Customers* (AR303000) form.
- The *JUICER10* and *JUICER10C* stock items, which hold the settings of two different professional series juicers, have been created on the *Stock Items* (IN202500) form.
- Three *JUICER10* and two *JUICER10C* stock items have been added to the *Purchase of juicers by Cuisine Green Cafe* opportunity on the **Document Details** tab of the *Opportunities* form.

## Process Overview

In this activity, you will do the following:

1. Create a sales quote on the **Quotes** tab of the *Opportunities* (CR304000) form.
2. Send the sales quote to the customer by email on the *Email Activity* (CR306015) form.
3. Create another sales quote that contains another set of products and discounts on the *Sales Quotes* (CR304500) form, and set this sales quote as the primary sales quote, meaning that it contains the agreed-upon terms of the deal.

## System Preparation

Before you start creating a sales quote for an opportunity, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Creating a Sales Quote

To create a sales quote for the *Purchase of juicers by Cuisine Green Cafe* opportunity, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of juicers by Cuisine Green Cafe* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the *Opportunities* (CR304000) form.
4. On the **Document Details** tab, notice that the *JUICER10* and *JUICER10C* stock items have been added, to represent the juicers in the proposed deal.
5. On the form toolbar, click **Create Quote**.
6. In the **Create New Quote** dialog box, which opens, do the following:
    a. In the **Quote Type** box, make sure that *Sales Quote* is selected.
    b. Click **Create and Review**.

       The system closes the dialog box and opens the new sales quote with the *Draft* status on the *Sales Quotes* (CR304500) form. On the **Document Details** tab, the system has added lines for the *JUICER10* and *JUICER10C* stock items, which it has copied from the opportunity.
7. On the **Document Details** tab, do the following:
    a. In the line with the *JUICER10* inventory item, in the **Discount, %** box, type `5`.
    b. In the line with the *JUICER10C* inventory item, in the **Discount, %** box, type `5`.
8. On the form toolbar, click **Save**.
9. On the form toolbar, click **Submit Quote**. In the Summary area, notice that the status of the sales quote has changed from *Draft* to *Prepared*. Now the sales quote can be sent to the customer for review.

You have created a sales quote. Notice that the system applied the discounts that you have entered and filled in the **Discount Amount** column for each product on the **Document Details** tab of the *Opportunities* form. The system has also added a row with the sales quote to the table on the **Quotes** tab of the form.

## Step 2: Sending the Sales Quote to the Customer by Email

To send a sales quote to the customer by email, do the following:

1. While you are still viewing the sales quote on the *Sales Quotes* (CR304500) form, on the form toolbar, click **Actions > Print Quote**. The system opens the *Sales Quote* (CR604500) report, which displays a ready-to-print version of the sales quote, in a pop-up window.
2. On the report toolbar of the report, click **Send**.

3. On the *Email Activity* (CR306015) form, which opens in a pop-up window, enter a message for the customer, and on the form toolbar, click **Send**. This creates an email activity associated with the sales quote on the **Activities** tab of the *Sales Quotes* form. A PDF file with the sales quote is attached to the email, which is added to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically to the customer email address from the default system email account the next time this schedule is executed.

   > If a template of an email has been created in the system, you can skip printing the sales quote and click **Actions > Send Quote** on the form toolbar of the *Sales Quotes* form. The system creates an email activity associated with the sales quote, adds the email on the **Activities** tab of the form, and sends it to the customer email address from the default system email account.

## Step 3: Copying a Sales Quote and Making the Sales Quote Primary

Suppose that your customer Roland Mercier has contacted you and informed you that the Cuisine Green Cafe would like to buy five *JUICER10C* juicers instead of two, but only if you give the company a 15 percent discount for the whole order. You have agreed to give the required discount. You need to create another sales quote and make this quote the primary one.

To copy a sales quote and mark this sales quote as primary, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of juicers by Cuisine Green Cafe* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the *Opportunities* (CR304000) form.
4. On the table toolbar of the **Quotes** tab, click **Copy Quote**.
5. In the **Copy Quote** dialog box, which opens, do the following:
   a. In the **Description** box, correct the description as follows: `2. Purchase of juicers by Cuisine Green Cafe`.
   b. Click **OK**. The system closes the dialog box and opens the copied sales quote on the *Sales Quotes* (CR304500) form.
   c. On the **Document Details** tab, do the following:
      1. In the row with the *JUICER10* inventory item, in the **Discount, %** column, type `15`.
      2. In the row with the *JUICER10C* inventory item, do the following:
         1. In the **Quantity** box, type `5`. This is the new quantity requested by the customer.
         2. In the **Discount, %** box, type `15`.
6. On the form toolbar, click **Save**.
7. On the form toolbar, click **Mark as Primary**.

You have created a sales quote and made it the primary sales quote. Now you can submit the sales quote, which changes the status of the sales quote to *Prepared*, and send the new sales quote to the customer.

## Managing Opportunities: To Create an Opportunity-Based Sales Order

The following activity demonstrates how to create a sales order that is based on an opportunity in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Your potential customer, the Greenex Cafe, would like to purchase apple and banana jams, and both companies have agreed to the deal. You need to close the opportunity as won, extend the *GREENEX* business account as a customer, create a sales order based on the opportunity, and send the sales order to the customer.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- The *CAFE* lead class has been created on the *Lead Classes* (CR207000) form.
- The *CAFE* business account class has been created on the *Business Account Classes* (CR208000) form.
- The *DEFAULT* customer class has been created on the *Customer Classes* (AR201000) form.
- The *PRODUCT* opportunity class has been created on the *Opportunity Classes* (CR209000) form and selected on the *Lead Classes* (CR207000) form.
- The *Catherine Hoff* lead has been created on the *Leads* (CR301000) form and converted to an opportunity as follows:
  - The *Purchase of jams by Greenex Cafe* opportunity has been created on the *Opportunities* (CR304000) form.
  - The *GREENEX* business account has been created on the *Business Accounts* (CR303000) form.
  - The *Catherine Hoff* contact has been created in the system on the *Contacts* (CR302000) form and associated with the *GREENEX* business account.
- The *APJAM96* and *BANJAM96* stock items, which hold the settings of apple and banana jams, have been created on the *Stock Items* (IN202500) form.
- Five *APJAM96* and five *BANJAM96* stock items have been added to the *Purchase of jams by Greenex Cafe* opportunity on the **Document Details** tab of the *Opportunities* form.

## Process Overview

In this activity, you will do the following:

1. Close the *Purchase of jams by Greenex Cafe* opportunity as won on the *Opportunities* (CR304000) form.
2. Extend the *GREENEX* business account as a customer on the *Business Accounts* (CR303000) form.
3. Starting on the *Opportunities* form, create a sales order associated with the *Purchase of jams by Greenex Cafe* opportunity, which opens the *Sales Orders* (SO301000) form with the sales order.
4. Starting on the *Sales Orders* form, send the sales order to the customer by email, which opens the *Email Activity* (CR306015) form.

## System Preparation

Before you start creating an opportunity-based sales order, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Closing an Opportunity as Won

To close the *Purchase of jams by Greenex Cafe* opportunity as won, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of jams by Greenex Cafe* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the *Opportunities* (CR304000) form.
4. On the form toolbar, click **Close as Won**.
5. In the **Details** dialog box, which opens, do the following:
   a. In the **Stage** box, select *Won*.
   b. Click **OK**. The system closes the dialog box. Most of the settings of the opportunity on the *Opportunities* form become unavailable for editing.

You have closed the opportunity as won.

## Step 2: Extending the Business Account as a Customer

Because a sales order requires the selection of a customer defined in the system and you are ready to create a sales order for the Greenex Cafe, you need to extend the *GREENEX* business account as a customer, which preserves the business account in the system and creates a related customer account.

To extend the business account as a customer, do the following:

1. While you are still viewing the *Purchase of jams by Greenex Cafe* opportunity on the *Opportunities* (CR304000) form, in the Summary area, click the Edit button right of the **Business Account** box.
2. On the *Business Accounts* (CR303000) form, which opens in a pop-up window, click **Extend as Customer** on the form toolbar. The system closes the form and opens the *Customers* (AR303000) form in a pop-up window.
3. In the **Customer Class** box, select *DEFAULT*.
4. On the form toolbar, click Save and Close.

You have extended the *GREENEX* business account as a customer. The system changes the type of the business account from *Business Account* to *Customer* in the Summary area of the *Business Accounts* form. Now you can create a sales order based on the opportunity.

## Step 3: Creating a Sales Order

To create an opportunity-based sales order for the *GREENEX* customer, do the following:

1. While you are still viewing the *Purchase of jams by Greenex Cafe* opportunity on the *Opportunities* (CR304000) form, on the form toolbar, click **Actions > Create Sales Order**.
2. In the **Create Sales Order** dialog box, which opens, do the following:
   a. In the **Order Type** box, make sure that *Sales Order* is selected.
   b. Click **OK**. The system closes the dialog box and opens the *Sales Orders* (SO301000) form with a new sales order that contains many of the settings copied from the opportunity. Notice that on the **Document Details** tab, the lines contain the product data specified on the same tab of the opportunity.
3. On the form toolbar, click Save and Close. The system closes the *Sales Orders* form and returns you to the *Opportunities* form.
4. On the **Orders** tab, notice that the system has added a row that holds the summary settings of the newly created sales order.

## Step 4: Sending the Sales Order to the Customer by Email

To send the sales order to the customer by email, do the following:

1. While you are still viewing the *Purchase of jams by Greenex Cafe* opportunity on the **Orders** tab of the *Opportunities* (CR304000) form, in the **Order Nbr.** column, click the link to the sales order that you have created in the previous step. The system opens the sales order on the *Sales Orders* (SO301000) form in a pop-up window.
2. On the form toolbar, click **Reports > Print Sales Order**. The system opens the *Sales Order* (SO641010) report, which displays a printable version of the sales order, in a pop-up window.
3. On the report toolbar, click **Send**.
4. On the *Email Activity* (CR306015) form, which opens in a pop-up window, do the following:
   a. In the **From** box, select *sales@sweetlife.com*.

**b.** In the text editor area, notice the template of the message for the customer. You can change the information in the message if needed.

**c.** On the form toolbar, click **Send**. The system closes the form and sends an email to the customer email address from the default system email account.

> If a template of an email has been created in the system, you can skip printing a sales order and click **Actions > Email Sales Order** on the form toolbar of the *Sales Orders* form. The system sends the email to the customer's email address from the system email account that you have selected.

You have sent the sales order to the customer by email.

> If you want to see emails associated with the sales order, on the title bar of the *Sales Orders* form for the sales order, click **Activities**. In the **Tasks & Activities** dialog box, which opens in a pop-up window, you can see the list of these emails. You can click the link to the needed email to view the email on the *Email Activity* form.

# Part 4: Support Operations

In Part 4 of this training course, you will learn how to use Acumatica ERP to complete the following basic tasks that may be usually performed by a customer support team:

- Creating cases
- Assigning cases to owners and workgroups
- Managing cases

For completing activities of the lessons in this part, you will use a company with the *U100* dataset preloaded, which provides a fully configured company with sample data specially designed for this course.

Activities in this part are to be completed under a user account of a delivery manager, a sales manager, or a technician. You can find the credentials to use for sign in to the prepared *U100* tenant in the *System Preparation* section of each activity.

The lessons of this part are independent: You can complete activities in any order.

# Lesson 11.1: Creating Cases

## Cases: General Information

Cases (also referred to as *support cases* or *tickets*) help your company track customer requests, questions, problems, and other inquiries submitted by email, phone, website, or live chat and find the solutions requested by your customers. Acumatica ERP gives you the ability to easily create and track cases based on your customers' requests. This topic provides information about creating cases in Acumatica ERP.

### Learning Objectives

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

- Become familiar with the ways of creating cases in Acumatica ERP
- Develop a general understanding of case settings
- Create a case manually

### Applicable Scenarios

You may want to learn how to create cases in Acumatica ERP in scenarios that include the following:

- You have received a request from your customer about your company's products or services and need to create a case in the system.
- Your customer has created a case on the Acumatica Self-Service Portal, and you need to solve the customer's problem related to the product or service that your company offers.

## Creation of Cases in Acumatica ERP

In Acumatica ERP, a case is a record created and viewed on the *Cases* (CR306000) form that represents a new, open, or closed request from a customer and has a variety of settings, such as the customer, the status of the case, and the user responsible for the case (that is, the owner of the case).

A case can be created in any of the following ways:

- By a user manually entering the case data on *Cases* form
- By a customer using the Acumatica Self-Service Portal
- By a user using the Acumatica mobile app
- By a user using the Acumatica add-in for Outlook

## Settings of a Case

You can enter, view, and modify (if applicable) the following case settings on the *Cases* (CR306000) form:

- In the Summary area, basic settings, such as the case's ID, date reported, case class, customer, contact, owner, status, subject, priority, and description. You can also specify the severity of the case, which may also relate to a time requirement; the reaction time (which determines the service level agreement) corresponding to each severity level is defined by the case class. (For details, see *Case Classes: Severity Levels and Response Times*.)
- On the **Details** tab, the description of the case.
- On the **Additional Info** tab, the customer settings, such as the business account, location, billing settings (billable work hours and billable overtime hours), workgroup, and time-related settings (work hours, overtime hours, and total hours spent on the case). For details about billing, see *Managing Cases: Billable Cases*.

  You can also specify a contract or default contract if the *Contract Management* feature has been enabled on the *Enable/Disable Features* (CS100000) form. Contract cases require specifying a contract on entry, and standalone cases require specification of the customer and the customer's case class, which determines the default contract. For details, see *Managing Cases: Billable Cases*.
- On the **Attributes** tab, the list of attributes, if they have been defined for the case class on the *Case Classes* (CR206000) form. Attributes may be used to help your company manage specific information that is useful for its business, such as the industry or number of employees in a customer company.

  A system administrator or a customizer can customize the *Cases* form to add to the Summary area the **User-Defined Fields** tab that holds the attributes. By using these fields, you can easily specify the attributes for the cases you are working with. For details, see *Attributes* and *User-Defined Fields*.
- On the **Activities** tab, emails, tasks, and activities associated with the case. You can use this tab as a starting point for adding activities and for viewing the activities that have been performed.
- On the **Related Cases** tab, the list of cases that block, depend on, are duplicates of, or are otherwise associated with this particular case (if any). For details, see *Managing Cases: General Information*.

# Cases: To Create a Case Manually

The following activity demonstrates how to manually create a case and specify basic settings for this case.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are a customer service representative of the SweetLife Fruits & Jams company. You have received a phone call from your customer, Kevin Grey, who is a buyer at the Groceriex chain of supermarkets in New York. Kevin ordered 25 jars each of apple, orange, and cherry jam, but only 15 jars of orange jam were delivered. (The other jams were delivered in full.) You need to arrange the delivery of 10 jars of orange jam to Groceriex within three working days.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
    - *Customer Management*: This feature provides the customer relationship management (CRM) functionality.
    - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Attributes* (CS205000) form, the *PRODUCT* attribute for cases has been created.
- On the *Case Classes* (CR206000) form, the *DELIVERY* case class, which defines cases related to the sale and delivery of products, has been created.
- On the *Customer Management Preferences* (CR101000) form, in the **Default Case Class** box, the *DELIVERY* case class has been specified.
- In the Summary area of the *Cases* (CR306000) form, the **User-Defined Fields** tab, which holds the values of attributes, has been added.

## Process Overview

In this activity, you will manually create a case on the *Cases* (CR306000) form.

## System Preparation

Before you start creating a case manually, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as delivery manager Marcos Garcia by using the following credentials:
    - Username: *garcia*

- Password: *123*

2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

### Step: Creating a Case Manually

To manually create a case for the request submitted by Kevin Grey of *GROCERIEX*, do the following:

1. Open the Cases (CR3060PL) form.
2. On the form toolbar, click **New Record**.
3. In the Summary area of the *Cases* (CR306000) form (**Document** tab), which opens, do the following:
    a. In the **Class ID** box, select *DELIVERY*.
    b. In the **Business Account** box, select *GROCERIEX*.
    c. In the **Contact** box, select *Kevin Grey*.
    d. In the **Subject** box, type `Delivery of the missing 10 jars of orange jam`.
    e. In the **Severity** box, select *Low*. Notice that in the **SLA** box, the system has inserted the date and time within which the delivery should occur.

       According to the settings specified for the *DELIVERY* case class on the **Reaction** tab of the *Case Classes* (CR206000) form, if a case has low severity, you have 5 working days to deliver the jam to the customer.
    f. In the **Priority** box, select **Medium**.
4. On the **User-Defined Fields** tab of the Summary area, in the **Products for sale** box, select *Orange jam 96 oz*.

   **Products for sale** is the description of the *PRODUCTS* attribute that was defined for the case class; the description of an attribute is used as its name on the UI.
5. On the **Details** tab of the form, in the text editor area, type `10 jars of orange jam were not delivered to GROCERIEX`.
6. On the form toolbar, click **Save**.

You have created a case based on the request from the existing *GROCERIEX* customer.

# Lesson 11.2: Assigning Cases to Owners and Workgroups

# Assigning Cases to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the case workload within the company. You can use assignment maps to indicate to the system how to assign cases to individuals or groups of people (that is, to owners or workgroups). In the following sections, you will find information about assigning cases to owners and workgroups one by one or through mass processing.

## Learning Objectives

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

- Assign a case manually to a particular owner
- Assign a selected group of cases to owners or workgroups by using a case assignment map

## Applicable Scenarios

You may want to learn how to assign cases to owners and workgroups in scenarios that include the following:

- You need to manually assign or reassign a case to another owner or workgroup.
- You need to assign a selected group of cases to owners by using a case assignment map.

## Assignment of Cases to Owners and Workgroups in Acumatica ERP

In Acumatica ERP, you can easily base the rules for case assignment on company policies because cases can be assigned to owners or workgroups in many different ways, based on the settings and attributes of the case records being assigned. You can assign cases manually or automatically by using a case assignment map.

To manually assign a case individually, when you create or edit the case on the *Cases* (CR306000) form, you can select an owner in the **Owner** box of the Summary area. By using this box, you can also manually change the owner of a case that has been manually or automatically assigned.

You can assign groups of cases that do not have owners specified by using the *Assign Cases* (CR503210) mass processing form. On this form, you can assign selected cases or all cases that do not have owners, and the system uses the case assignment map specified in the **Case Assignment Map** box (in the **Assignment Settings** section of the **General Settings** tab) of the *Customer Management Preferences* (CR101000) form to determine the owners of the cases.

If you want the system to distribute cases by using an assignment map, you must perform two tasks. You first create a company tree, described in the next section, on the *Company Tree* (EP204061) form. Then you create the needed map for the automatic assignment of cases by using the *Assignment Maps* (EP205010) form. For detailed instructions on configuring assignment maps, see *Configuring Assignment Maps*.

## The Company Tree and Workgroups

Maintaining and using a functional organizational chart in an ERP system can facilitate the assignment of work and approvals for optimal collaboration within teams and smoother workflows.

In Acumatica ERP, a company tree is a hierarchical structure that contains groups of people, their roles, and chains of assignments and approvals. A company tree may include both the company's organizational chart with different levels of management and a hierarchy of groups representing real business relations and functions.

On the *Company Tree* (EP204061) form, you can easily create a hierarchy of groups for approvals or assignments, and include the same people or groups of people in different workgroups. Thus, users can participate in multiple workflows. You can use approvals for cross-department projects, which have a manager and project participants that may belong to different company departments but be members of the same chain of approvals. We recommend using a company tree to speed and streamline your assignments and approvals.

### Execution Errors Related to the Mass-Assignment of Cases

If an assignment map contains errors (for example, a workgroup contains an employee who has quit the company and cannot be assigned to any records) and you have processed any cases that should be assigned according to this assignment map by using the *Assign Cases* (CR503210) form, the system will list these errors in the **Processing** dialog box. You can view the error by clicking the More button on the **Errors** tile. In the **Message** column, the system displays the text of the error message.

### Notifications About Assigning a Case to an Owner

In Acumatica ERP, an administrator can set up email notifications on the *Business Events* (SM302050) form so that if a user is assigned to a new case, this user receives a notification by email, by SMS, or in the Acumatica mobile app. For details, see *Business Events: Email Notifications*.

## Assigning Cases to Owners and Workgroups: Process Activity

The following activity demonstrates how to assign cases to owners. You will practice assigning cases to the appropriate owners, both manually for an individual case and by using the mass processing form to assign multiple cases to the needed owners.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. You have received a phone call from your customer, Delicious Energy Restaurant, about the repair of a juicer. You have created a case and need to assign the case to your colleague, Jeffrey Vega, who is a technician in SweetLife.

Further suppose that later that day you have checked the cases in your system and noticed that a few of them were not assigned to owners and workgroups. You need to assign these unassigned cases to the appropriate owners and workgroups.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:

- *Customer Management*: This feature provides the customer relationship management (CRM) functionality.
- *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.

- On the *Case Classes* (CR206000) form, the *PRESALE*, *DELIVERY*, and *JREPAIR* case classes have been created.
- On the *Assignment Maps* (EP205010) form, the *Case Assignment Map* has been created. According to the rules (and their conditions and actions) specified in this assignment map, cases are assigned as follows:
  - The cases of the *PRESALE* case class are assigned to David Chubb.
  - The cases of the *DELIVERY* case class are assigned to the *Delivery* workgroup in the SweetLife *Aftersales* department.
  - The cases of the *JREPAIR* case class are assigned to the *Technical Support* workgroup in the *Aftersales* department.
- On the *Customer Management Preferences* (CR101000) form (in the **Case Assignment Map** box of the **Assignment Settings** section of the **General Settings** tab), the *Case Assignment Map* assignment map has been specified. The system will use this assignment map during the process of mass-assigning cases.
- On the *Cases* (CR306000) form, the case that has the *Repair of a juicer for Delicious Energy Restaurant* subject has been created.

## Process Overview

In this activity, you will do the following:

1. On the *Cases* (CR306000) form, manually assign a particular case to an owner.
2. On the *Assign Cases* (CR503210) form, assign all the unassigned cases to owners.

## System Preparation

Before you start assigning cases to owners, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as sales manager David Chubb by using the following credentials:
   - Username: *chubb*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Assigning a Case to an Owner

To manually assign a case to an owner, do the following:

1. Open the Cases (CR3060PL) form.

2. In the **Case ID** column, click the link for the case that has *Repair of a juicer for Delicious Energy Restaurant* in the **Subject** column to open the case for the *DELIENERGY* customer on the *Cases* (CR306000) form.

3. In the **Owner** box of the Summary area, select *Jeffrey Vega*.

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

You have manually assigned a case to an owner.

## Step 2: Assigning the Unassigned Cases to Owners and Workgroups

Suppose that you need to assign all the currently unassigned cases to owners and workgroups.

To mass-assign cases to owners, do the following:

1. Open the *Assign Cases* (CR503210) form.

2. In the table, click the header of the **Owner** column.

   If you need to change the order of columns in any table, you can drag a column by its header to the new place in the table.

3. In the Sorting and Filtering Settings dialog box, which opens, do the following to filter unassigned cases:

   a. Select the *Is Empty* filter condition.

   b. Click **OK**. The system closes the dialog box and applies the filter.

4. On the form toolbar, click **Process All**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning cases. Based on the settings specified for the *Case Assignment Map* on the *Assignment Maps* (EP205010) form in the *U100* dataset, all the selected cases have been assigned to the *Delivery* workgroup, the *Technical Support* workgroup, or David Chubb.

   If an assignment map contains errors, the system will list these errors in the **Processing** dialog box. You can view the errors by clicking the More button on the **Errors** tile: In the **Message** column, the system displays the text of each applicable error message.

   In situations when you want to assign only selected cases to owners, you would select unlabeled check boxes in the table for the needed cases and click the **Process** button on the form toolbar.

5. Click **Close** to close the dialog box and return to the form. For the cases that had not been assigned to owners or workgroups, the system has inserted either the name of the workgroup in the **Workgroup** column, or *David Chubb* in the **Owner** column.

You have assigned the unassigned cases to owners or workgroups, with the system using the rules specified in the case assignment map.

# Lesson 11.3: Managing Cases

## Managing Cases: General Information

Acumatica ERP provides tools that help your customer support team create, track, and resolve cases.

### Learning Objectives

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

- Make optimal use of the case management capabilities of Acumatica ERP
- Develop a general understanding of billing settings for a case and case-related activities
- Process a case and notice the states of its life cycle
- Create an email and an activity associated with a case
- Become familiar with ways of associating a case with other cases
- Prepare and review an accounts receivable invoice for the case

### Applicable Scenarios

You may want to learn how to manage cases in Acumatica ERP in scenarios that include the following:

- You have investigated the issue related to a case and need to record your work on the case.
- You have resolved a case and need to bill the customer for the work performed on it.
- You need to understand how many cases your team has in the backlog.

### Case Management in Acumatica ERP

In Acumatica ERP, you can reassign, process, and escalate cases. The processing of cases is described further in this topic. You can also associate a case with another case, if needed, as described in *Relationships Between Cases*.

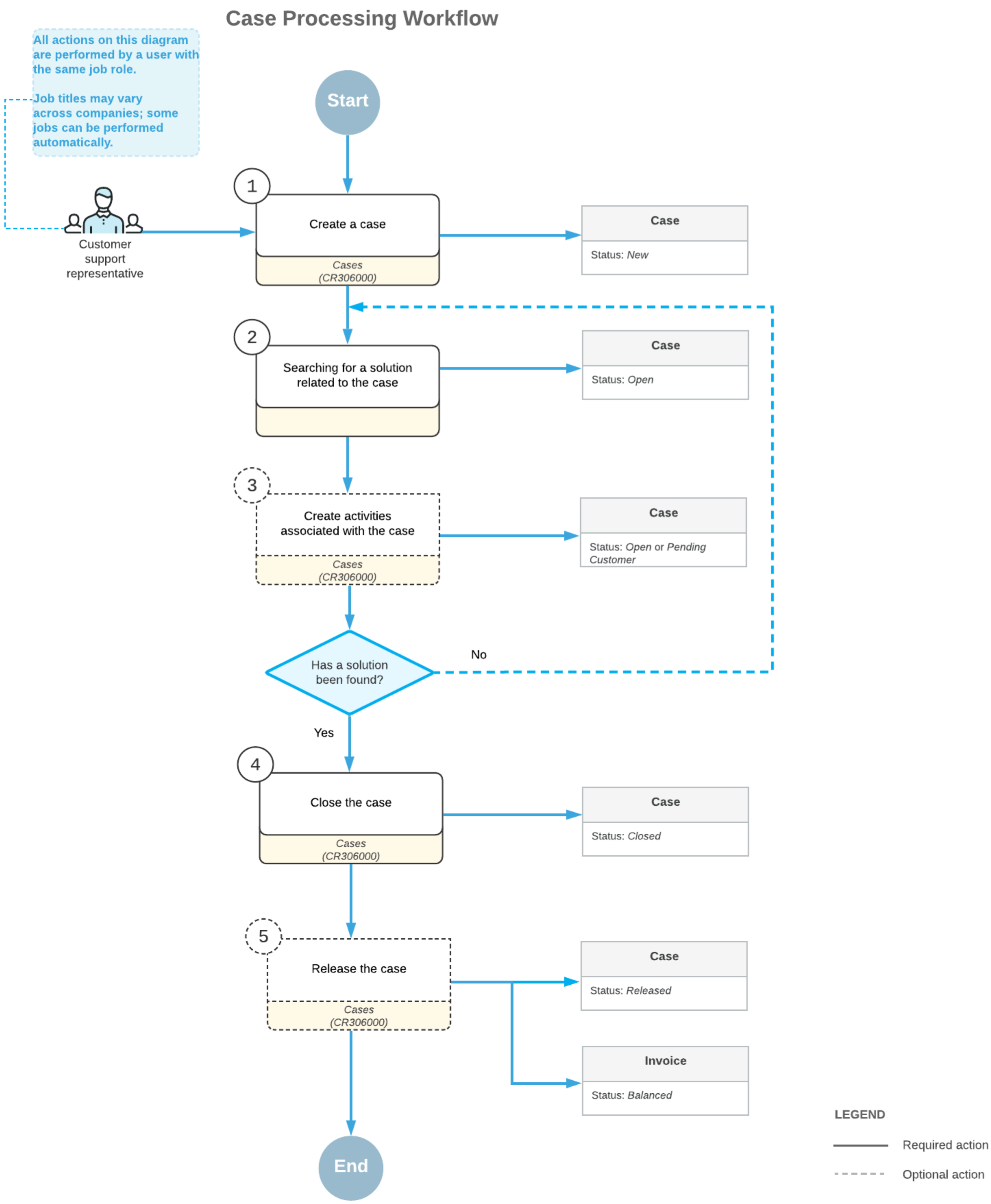
Depending on your company's customer support processes, you can manage a case by performing the following steps:

1. Creating a case in the system: On the *Cases* (CR306000) form, you create a case to record the customer's request or problem. For details, see *Creating Cases*.
2. Searching for a solution: This step may involve communication with the customer support team, your company, and the customer, as well as any needed external communication, in order to find the solution for the customer's request or problem.
3. Creating activities associated with the case (optional): In Acumatica ERP, you can track the activities you perform to resolve the case. These activities may include creating emails, making phone calls, or conducting meetings. You can create and track these activities by using the **Activities** tab of the *Cases* form.
4. Closing the case on the *Cases* form.

**5.** Releasing the case activities, the case, or both the case and the activities, and billing the customer by creating an invoice based on the case or the case activities (optional step): Individual cases are billed once they are released on the *Cases* form, and cases that are managed according to a contract are billed in batches when it is time to issue an invoice for the contract. For details, see *Managing Cases: Billable Cases*.

## Workflow of Case Processing

The following diagram illustrates the processing of a case in Acumatica ERP.


Case Processing Workflow
All actions on this diagram are performed by a user with the same job role.
Job titles may vary across companies; some jobs can be performed automatically.
Customer support representative
Start
1
Create a case
Cases (CR306000)
Case
Status: New
2
Searching for a solution related to the case
Case
Status: Open
3
Create activities associated with the case
Cases (CR306000)
Case
Status: Open or Pending Customer
Has a solution been found?
No
Yes
4
Close the case
Cases (CR306000)
Case
Status: Closed
5
Release the case
Cases (CR306000)
Case
Status: Released
Invoice
Status: Balanced
End
LEGEND
Required action
Optional action

## Processing of a Case Through States

In Acumatica ERP, as a case is being processed by a customer support team, it progresses through various states. Each state is represented in the system by a status, which is displayed in the **Status** box in the Summary area of the *Cases* (CR306000) form. Because the system updates the status of the case during processing, the **Status** box is unavailable for editing. A user can initiate transitions between case states—which causes the system to update the status accordingly—by clicking actions on the form toolbar of the *Cases* form. The *priority action*—the action that is the expected next step in the workflow—is displayed as a button on the form toolbar.

In Acumatica ERP, a case may be assigned one of the following statuses:

- *New*: The case has been created in the system, but no work has been done on it yet. A case with this status can have the *Unassigned*, *Assigned*, or *Opened on Portal* value in the **Reason** box of the Summary area.
- *Open*: The case is being worked on by a support team. A case with this status can have any of the following values in the **Reason** box: *Assigned*, *In Process*, *Updated*, *In Escalation*, or *Pending Closure*.
- *Pending Customer*: The support team is waiting for a response or feedback from a customer. A case with this status can have any of the following values in the **Reason** box: *More Info Requested*, *Waiting Confirmation*, or *Pending Closure*.
- *Closed*: The customer's problem has been resolved, a solution has been found, or no further work is expected to be done on the case. A case with this status can have any of the following values in the **Reason** box: *Resolved*, *Rejected*, *Canceled*, *Abandoned*, or *Duplicate*.
- *Released*: The AR invoice for the works performed has been generated for a customer on the *Invoices and Memos* (AR301000) form. A case with this status has the *Resolved* value in the **Reason** box.

You can analyze case processing and productivity-related metrics for your support team by generating support reports. For details, see *Support Reports: General Information*.

## Relationships Between Cases

A case can be associated with other cases. For example, a case might be defined so that it cannot be resolved until another case, known as a "blocker" case, is resolved.

> The relations between cases can be specified only for informational purposes, so that your customer support team can track and enforce these relations; these relations are not enforced by the system.

On the **Related Cases** tab of the *Cases* (CR306000) form, you can list cases related to the current case, and specify one of the following relations for each listed case:

- *Blocks*: The current case should not be closed before the listed case, which is a blocker case, has been closed.
- *Depends On*: The listed case depends on the current case.
- *Related*: There is a "peer" relation between the case with this relation and the current case. That is, neither case blocks or depends on the other case, but the two cases are related in some way.
- *Duplicate Of*: The current case is a duplicate of the listed case.

### Template-Based Emails Related to Cases

A system administrator can configure Acumatica ERP to automatically send template-based emails related to cases. For example, you might set up the system to send an email to a case owner about the assignment of a new case. For details, see *Business Events: Email Notifications*.

## Managing Cases: Billable Cases

In Acumatica ERP, your customer support team can bill customers for cases and create and track billable emails and activities—such as phone calls, appointments, and any other time spent on the case—associated with the case. Based on these emails and activities, you can bill customers for the time that your support team has spent on processing the case, based on the released activities.

In Acumatica ERP, the billing settings of a case are defined by the settings of the billing mode that is specified for the case class on the **Details** tab of the *Case Classes* (CR206000) form. If a case is billable, on the **Additional Info** tab of the *Cases* (CR306000) form, the system selects the **Billable** check box and makes it unavailable for editing. Activities that are associated with the case can be billable or not billable; this setting should be specified for the case class. For details, see *Defining Case Classes*.

Cases and case-related activities can be billed in accordance with a specific contract or a default contract associated with the case class if the *Time Reporting on Activity* feature is enabled on the *Enable/Disable Features* (CS100000) form.

### Case-Based Billing Settings

For a case of a class that has the *Per Case* billing mode selected in the **Billing Mode** box on the **Details** tab of the *Case Classes* (CR206000) form, you can do the following:

- Release the case for billing if the case has the *Closed* status. If any activity related to the case has not been completed yet (and approved, if approval is required), you cannot release the case.
- Release the case for billing on the *Cases* (CR306000) form; you can also mass-release cases on the *Release Cases* (CR507000) form.
- Manually override the total number of billable hours of the case in the **Billing** section on the **Additional Info** tab of the *Cases* form. The invoice total includes the total number of billable hours that have been reported for the activities associated with the case. If the *Time Reporting on Activity* feature is disabled, manually overriding the number of billable hours is the only way you can report the time spent on a case; the customer will then be billed based on the time that you have specified.
- If the case is associated with a contract, enable case counting by specifying an item in the **Case Count Item** box of the **Summary** tab (**Case Billing Settings** section) of the *Contract Templates* (CT202000) form. With case counting, you can bill your customer for only the number of cases associated with the contract. The billable hours reported for the case will also be billed. For details, see *Managing Contracts*.
- Use direct billing, which means that the customer associated with the case is billed directly without any contract involved. You must clear the **Require Contract** check box on the *Case Classes* form to use direct billing for cases of the class.

## Activity-Based Billing Settings of a Case

If a case that has the *Per Activity* billing mode selected in the **Billing Mode** box on the **Details** tab of the *Case Classes* (CR206000) form, the case must be associated with a contract so that related activities can be billed according to the costs defined by this contract.

For a case of the class has the *Per Activity* billing mode, you can do the following:

- Bill the customer for separate activities when the case is not yet closed. This mode may be useful when the case cannot be closed by the end of the billing period, although you need to bill the customer for the services already rendered.
- Release only the activities associated with the case on the *Release Time Activities* (EP507020) form. The case cannot be marked as billable and released for billing.

## Billable Activities Associated with a Case

In Acumatica ERP, you can bill a customer for an email or an activity that is associated with a case and marked as billable. If there are any tasks or events associated with the case, the activities related to these tasks and events are billed as activities related to the case.

Before you can create a case-related invoice for an activity, make sure that the following tasks have been performed in the system:

1. The activity has been marked as billable on the *Activity* (CR306010) form, with the **Track Time** check box selected and the hours specified in the **Billable Time** check box.
2. The activity has been completed (that is, it has the *Completed* **Status**).
3. If approval of activities is required, the activity has been approved for billing. For details, see *Time Activities*.
4. The activity has been released.

You can release a completed and approved (if required) activity for billing in one of the following ways:

- By releasing a time card on the *Release Time Cards* (EP505010) form if the owner of the activity uses time cards
- By using the *Release Time Activities* (EP507020) form
- By releasing the related case if the case is billed within the *Per Case* billing mode

When a contract-related case is released for billing, the contract usage data is updated. You can view the resulting data on the *Contract Usage* (CT303000) form. For more information on how contract-related cases are billed, see *Contract Billing*.

You use the *Invoices and Memos* (AR301000) form to view the invoices that were generated during direct billing.

You can view the data on the resulting customer transactions by using the *Customer History* (AR652000) report.

## Billable Activities Associated with a Project

If a case activity is associated with a project, a project transaction may be created during direct billing. Alternatively, the same project transaction may be generated during the release of the time card that includes the case activity if the time card is released before the case is billed. For details about time card release, see *Time Cards*. These project transactions can be used for tracking the project costs. For details about project cost tracking, see *Project Budget: General Information*.

# Managing Cases: To Process a Non-Billable Case

The following activity demonstrates how to process a non-billable case in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

## Story

Suppose that you are Jeffrey Vega, a technician at the SweetLife Fruits & Jams company. David Chubb, a sales manager, has created a case in the system based on a phone call from Chuck Hester, who is a purchase manager at Fruitland, a store in Baltimore. Chuck Hester is thinking of purchasing a commercial juicer from SweetLife, and Fruitland has a number of accessories for a similar juicer. Chuck needs to know if these accessories (the feeder kit and the peel ejector kit) suit the juicer that he might buy.

## Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Attributes* (CS205000) form, the *ORGSIZE* and *INTERESTED* attributes for cases have been created.
- On the *Case Classes* (CR206000) form, the *PRESALE* case class, which defines pre-sales requests from potential clients and customers, has been created.
- On the *Cases* (CR306000) form, a case has been created that has *Request for compatibility of accessories* in the **Subject** column.
- On the *Contacts* (CR302000) form, the *Chuck Hester* contact has been created.

## Process Overview

In this activity, you will do the following:

1. Open the case on the *Cases* (CR306000) form.
2. Create an email on the *Email Activity* (CR306015) form to reply to the customer's request.
3. Close the case on the *Cases* (CR306000) form.

## System Preparation

Before you start working on the case, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as technician Jeffrey Vega by using the following credentials:
   - Username: *vega*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Opening the Case

To open the case for the request from the *Chuck Hester* contact, do the following:

1. Open the Cases (CR3060PL) form.
2. In the row with *Request for compatibility of accessories* in the **Subject** column, click the link in the **Case ID** column. The case opens on the *Cases* (CR306000) form.
3. On the form toolbar, click **Take Case**. Notice that in the **Owner** box, the system has inserted *Jeffrey Vega*.
4. Click **Open**.
5. In the **Details** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

You have opened the case. Notice that in the Summary area of the *Cases* form, the system has inserted *Open* in the **Status** box and *In Process* in the **Reason** box.

## Step 2: Creating the Case-Related Email

Suppose that you have verified that the feeder kit and the peel ejector kit are compatible with the *JUICER10C* model.

To send an email to Chuck Hester communicating this information, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, open the **Activities** tab.
2. On the table toolbar, click **Add Email**. The *Email Activity* (CR306015) form opens in a pop-up window. Notice that in the **To** box, the system has inserted the contact's name, *Chuck Hester*, and in the **Subject** box, the system has inserted the ID and the subject of the case.
3. In the **From** box, select the *support@sweetlife.com*.
4. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

```
Dear Chuck,

I am happy to confirm that the feeder kit and the peel ejector kit are compatible
with the JUICER10C. You can easily use them with the juicer at your convenience.
```

5. On the **Details** tab, select the **Internal** check box to hide the email from the Self-Service Portal users.

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

7. Click **Send**. The system closes the *Email Activity* (CR306015) form and returns you to the *Cases* form. Notice that a row with the *Email* type is added to the table on the **Activities** tab of the *Cases* form.

As a result, the email is generated by the system and added to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed.

> If the outgoing mail queue is too long, it may take time for the system to process and send all outgoing mail at once.

### Step 3: Closing the Case

To close the case for the *FRUITLAND* customer, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, on the form toolbar, click **Close**.

2. In the **Details** dialog box, which opens, do the following:

    a. In the **Reason** box, select *Resolved*.

    b. Click **OK**. The system closes the dialog box and returns you to the form.

You have closed the case. Notice that in the Summary area of the *Cases* form, the system has inserted *Closed* in the **Status** box and *Resolved* in the **Reason** box.

## Managing Cases: To Process a Billable Case

The following activity demonstrates how to process a billable case that has the *Per Case* billing mode in Acumatica ERP.

> The following activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

### Story

Suppose that you are Jeffrey Vega, a technician at the SweetLife Fruits & Jams company. You have received by email a request for the repair of a juicer from your customer Tonya Lawrence, a buyer at Storehut, a chain of supermarkets in New York. You have created a case in the system based on the email from Tonya and assigned the case to yourself. You need to repair the juicer, record the results of the repair in the system, and release the case for billing, causing an invoice to be created for the fixing of the juicer.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Attributes* (CS205000) form, the *MODEL* attribute for cases has been created.
- On the *Case Classes* (CR206000) form, the *JREPAIR* case class, which defines cases related to the repair and maintenance of juicers, has been created. The *Per Case* billing mode has been specified for this case class.
- On the *Cases* (CR306000) form, a case has been created that has the *Request for juicer repair from Storehut* in the **Subject** column.
- The *STOREHUT* business account record has been extended as a customer, with its settings specified on the *Customers* (AR303000) form.

## Process Overview

In this activity, you will do the following:

1. Open the case on the *Cases* (CR306000) form.
2. Create a billable email on the *Email Activity* (CR306015) form to record the results of the repair and inform the customer about fixing the juicer.
3. Create a billable activity of the *Appointment* type on the *Activity* (CR306010) form to record the results of delivering the repaired juicer to the client.
4. Close the case on the *Cases* form.
5. Release the case for billing on the *Cases* form, which causes the system to generate an AR invoice on the *Invoices and Memos* (AR301000) form.
6. View the AR invoice on the *Invoices and Memos* form.

## System Preparation

Before you start working on the billable case, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as technician Jeffrey Vega by using the following credentials:
   - Username: *vega*
   - Password: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

## Step 1: Opening the Case

To open the case for the request from the *STOREHUT* customer, do the following:

1. Open the Cases (CR3060PL) form.
2. In the row with *Request for juicer repair from Storehut* in the **Subject** column, click the link in the **Case ID** column. The case opens on the *Cases* (CR306000) form.
3. On the form toolbar, click **Open**.
4. In the **Details** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

You have opened the case. Notice that in the Summary area of the *Cases* form, the system has inserted *Open* in the **Status** box and *In Process* in the **Reason** box.

## Step 2: Creating a Billable Email Associated with the Case

Suppose that you have fixed the juicer and need to record the billable time for the repair in the system and inform the customer about the result of the repair and the time for the delivery of the juicer. For simplicity, you will create one email for these purposes.

To create a billable email associated with the case, do the following:

1. While you still viewing the case with the *Request for juicer repair from Storehut* subject on the *Cases* (CR306000) form, open the **Activities** tab.
2. On the table toolbar, click **Add Email**. The *Email Activity* (CR306015) form opens in a pop-up window. Notice that in the **To** box, the system has inserted the contact's name, *Tonya Lawrence*, and in the **Subject** box, the system has inserted the ID and the subject of the case.
3. In the **From** box, select *support@sweetlife.com*.
4. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

   ```
   Dear Tonya,

   The juicer JUICER15 has been repaired.

   The delivery is scheduled for tomorrow between 2 PM and 4 PM. Please confirm that
   the time range is suitable.
   ```

5. On the **Details** tab, do the following:
   - **a.** Select the **Track Time** check box. This causes the system to display additional UI elements on the tab.
   - **b.** Make sure that the **Billable** check box is selected.
   - **c.** Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that you have performed the repair during your working hours.
   - **d.** In the **Time Spent** box, select *02:30*, which means that it took you two and a half hours to repair the juicer. Notice that in the **Billable Time** box, the system has inserted the time that you have specified in the **Time Spent** check box.

e. In the **Project** box, select *X—Non-Project Code*.

6. On the form toolbar, click **Save**.
7. Click **Send**. The system closes the *Email Activity* (CR306015) form and returns you to the *Cases* form. Notice that a row with the *Email* type has been added to the table on the **Activities** tab of the *Cases* form for the case.

   As a result, the email is generated by the system and added to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed.

   > If the outgoing mail queue is too long, it may take time for the system to process and send all outgoing mail at once.

8. In the **Summary** box, click the link to open the email.
9. On the **Details** tab, in the **Status** box, select *Completed*.

   > For simplicity, in this activity, you have changed the status of the email before receiving the confirmation from the customer. (In actual case processing, you would change the status after receiving the confirmation.) You can release a case (which you will do later in this activity) if all the activities associated with the case have the *Completed* status.

10. On the form toolbar, click **Save**.
11. Close the form. The system returns you to the *Cases* form with the case open. On the **Activities** tab, notice that a row with the *Email* type has been added to the table.

## Step 3: Creating a Billable Activity of the Appointment Type Associated with the Case

Suppose that your customer has confirmed the delivery and you need to record the time for the delivery in the system.

To create a billable activity of the *Appointment* type, do the following:

1. While you are still viewing the case with the *Request for juicer repair from Storehut* subject on the *Cases* (CR306000) form, on the table toolbar of the **Activities** tab, click **Add Activity > Add Appointment**. The *Activity* (CR306010) form opens in a pop-up window.
2. In the **Summary** box, type a brief description of the activity: `Delivery of a juicer to Storehut`.
3. Select the **Internal** check box to hide the activity from the Self-Service Portal users.
4. In the **Date** box, specify the current date.
5. In the text editor area, type your comments or any other information related to the appointment, such as `The courier Tim Fincher will deliver the juicer`.
6. Select the **Track Time** check box. This causes the system to display additional UI elements on the tab.
7. In the **Status** box, select *Completed*.

8. Make sure that the **Billable** check box is selected.

9. Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that the juicer will be delivered during working hours.

10. In the **Time Spent** box, select *01:00*, which means that it will take an hour to deliver the juicer. Notice that in the **Billable Time** box, the system has copied the time that you have specified in the **Time Spent** check box.

11. In the **Project** box, select *X—Non-Project Code*.

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

13. Close the form. The system returns you to the *Cases* form. Notice that a row with the *Appointment* type has been added to the table on the **Activities** tab of the *Cases* form for the case.

## Step 4: Closing the Case

To close the case for the *STOREHUT* customer, do the following:

1. While you are still viewing the *Request for juicer repair from Storehut* case on the *Cases* (CR306000) form, on the form toolbar, click **Close**.

2. In the **Details** dialog box, which opens, do the following:

   a. In the **Reason** box, select *Resolved*.

   b. Click **OK**. The system closes the dialog box and returns you to the form.

You have closed the case. Now you can bill your customer for the repair of the juicer by releasing the case, which causes the system to create an invoice. Notice that in the Summary area of the *Cases* form, the system has inserted *Closed* in the **Status** box and *Resolved* in the **Reason** box.

## Step 5: Releasing the Case

To release the *Request for juicer repair from Storehut* case, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, open the **Activities** tab.

2. On the table toolbar, click **Refresh** to make sure that all the activities are displayed.

   You need to refresh the data in the table if any automatic email notification related to case closure has been configured in the system and the corresponding notification template has been defined to save emails as activities on the **Activities** tab of the form. You may need to wait for a few moments until the system creates an email and lists this email on the **Activities** tab.

3. In the **Status** column, make sure that all the rows have the *Completed* option.

   You can release a case if all the activities associated with the case have the *Completed* status.

4. On the table toolbar, click **Release**.

   It may take some time for the system to release the case. When the case has been released, on the form toolbar, a green check mark is displayed. In the **Status** box of the Summary area, the system changes the status of the case to *Released*. On the *Invoices and Memos* (AR301000) form, the system creates an invoice associated with the case.

## Step 6: Viewing the Case-Based Invoice

To view the invoice associated with the *Request for juicer repair from Storehut* case, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, on the form toolbar, click **Inquiries > View Invoice**.

2. On the **Document Details** tab of the *Invoices and Memos* (AR301000) form, which opens, notice one detail row with the following settings of the invoice:

   - **Inventory ID**: The *TECHNICIAN* labor item
   - **Unit Price**: The rate for the works performed
   - **UOM**: Hours
   - **Quantity**: The number of hours that were spent to resolve the case