



# CRM Marketing Operations

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# Timing and Agenda

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**June 29, 2021 -10 AM -11 AM**

**Day 1**

**Lesson 1.1: Creating Leads**

**Lesson 1.2: Validating Records for Duplicates**

**June 30, 2021 -10 AM -11 AM**

**Day 2**

**Lesson 2.1: Assigning Leads to Owners and Workgroups**

**Lesson 2.2: Managing Emails and Activities**

**Lesson 2.3: Managing Marketing Lists**

# Timing and Agenda

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**July 1, 2021 -10 AM -11 AM**

**Day 3**

**Lesson 2.4: Managing Mass Emails Related to a Marketing List**

**Lesson 3.1: Managing Marketing Campaigns**

**Lesson 3.2: Managing Mass Emails Related to a Marketing Campaign**

**Lesson 4: Qualifying Leads (Marketing)**

# Day 1

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## Lesson 1: Acquiring Audience

# Lesson 1.1: Creating Leads

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## Learning Objectives

In this lesson, 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

# Methods for Lead Creation

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1. Create Manually
2. Import Lead from external Source Using Import by Scenario
3. Scan a Leads Business Card Using the Mobile App
4. Convert Contacts or Business Accounts to Leads Using the Actions Menu
5. Acumatica add-in for Outlook
6. Integration with Web Services
7. Integration with HubSpot
8. Activation of Incoming Mail Processing to Create Leads Automatically
9. Acumatica Mobile App

# Contact Information

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You can synchronize contact information in leads, contacts, and business accounts by using the **Override** check box on the **Contact Info** 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 related on the other forms.



# Flexible Classification of Leads

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- In Acumatica ERP, you can easily categorize leads into different classes and gather different sets of additional information about leads of different classes.
- 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. When a class for a lead has been selected, the attributes assigned to this class appear on the Attributes tab of the Leads (CR301000) form as additional elements that can be used to specify information about the lead.
- 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

# Leads: To Create a Lead Manually

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## 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.

# Leads: To Import Leads From a Purchased List

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## 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.

# Leads: To Create a Lead by Using the Acumatica Add-In for Outlook

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## Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. Bill receives an email from Stephanie Andrews, a purchasing manager at Muffin Secret bakery. In the email, Stephanie requests for the detailed price list of the SweetLife Fruits & Jams. Bill needs to register the lead in the system for further communication.

# Lesson 1.2: Validating Records for Duplicates

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## Learning Objectives

In this lesson, you will do the following:

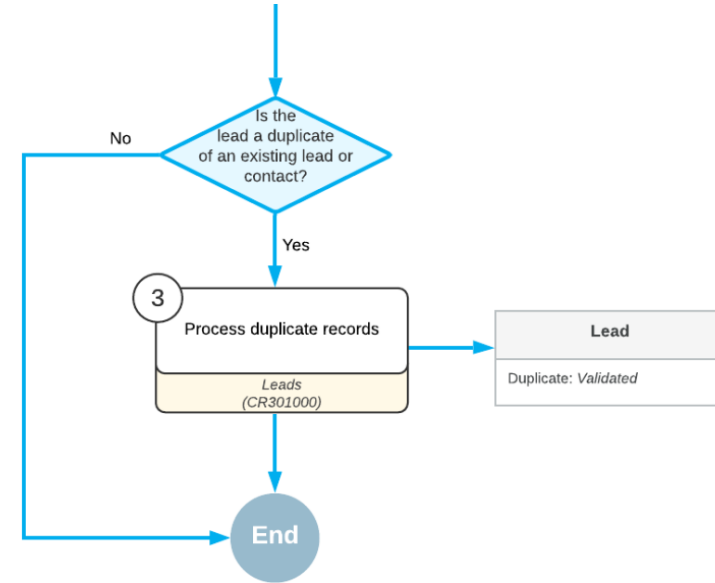
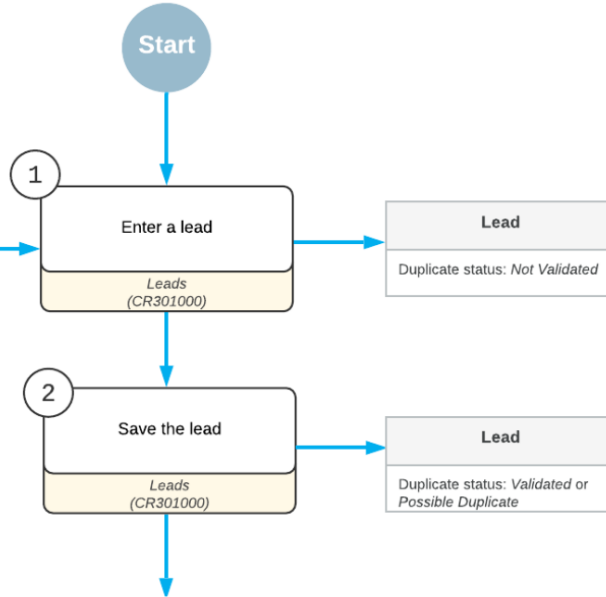
- Get familiar with the process of duplicate validation in the system
- Validate individual leads and contacts for duplicates
- Merge duplicate leads
- Link leads and contacts
- Validate multiple leads for duplicates

# Workflow of Duplicate Validation on Entry for Leads and Contacts

Job titles may vary across companies; some jobs can be performed automatically. All actions in this diagram are performed by a user with the same job role



Marketing manager



# Validation of Records for Duplicates in Acumatica ERP

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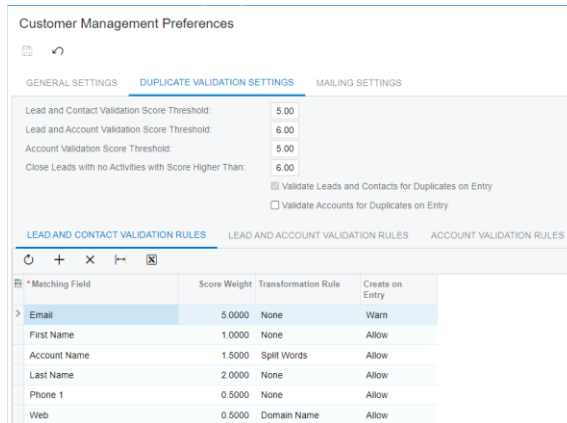
Acumatica ERP provides the following abilities to validate records for duplicates:

- 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.
- The system can warn you if you try to save a duplicate lead, contact, or business account
- You can mass-validate groups of records
- As a result of the validation, the lead, contact, or business account is given the duplicate validation status of either Validated or Possible Duplicate
- 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.
- You can merge duplicate records into one record

# Validation of Individual Leads and Contacts for Duplicates on Entry

The process of validation:

1. Enter lead information such as name, email address, phone number into the Leads form.
2. Click save on the toolbar. By clicking save the system automatically checks for duplicate of this record. If one duplicate is found it will ask you to confirm or cancel the save.
3. Duplicates are determined based on duplication scores configured in Customer Management Preferences



The screenshot shows the 'Customer Management Preferences' window with the 'DUPLICATE VALIDATION SETTINGS' tab selected. It contains several input fields for validation thresholds and two checkboxes for validation rules.

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

Validation Rules:

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

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



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

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## 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 K. 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.

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

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## 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, restaurants, and store employees. You need to check these leads for duplicates.

## Day 2

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## Lesson 2: Managing Audience

# Lesson 2.1: Assigning Leads to Owners and Workgroups

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## Learning Objectives

In this lesson, 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

# Assignment of Leads to Owners in Acumatica ERP

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1. 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.
2. You can also manually change the owner of a lead that has been manually or automatically assigned.
3. You can assign groups of leads that do not have owners specified by using the [Assign Leads](#) (CR503010) mass processing form.
  1. The system uses the assignment map specified on the [Customer Management Preferences](#) (CR101000) form to determine the owners of the leads.
4. 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.

# The Company Tree and Workgroups

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1. 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.
2. In Acumatica ERP, a company tree is a hierarchical structure that contains groups of people, their roles, and chains of assignments and approvals.
3. 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.

# Distribution of Leads by Using Lead Classes

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1. 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
2. You do this by selecting the appropriate option in the **Default Owner** box on the **Details** tab
3. 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.
4. In the **Default Owner** box of the [Lead Classes](#) form, you select one of the following options for leads of the class:
  1. *Do Not Change*
  2. *Creator*
  3. *Assignment Map*
  4. *From Source Entity*



# Distribution of Leads by Using Assignment Maps

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1. You can use the assignment map functionality to distribute leads automatically through the use of lead classes or manually when you mass-assign leads.
2. An assignment map is a set of rules, actions related to rules, and conditions that can be used for assigning a record or a number of records for processing to a particular individual or a group of people.
3. An assignment map may include any number of rules
4. Once a lead assignment map has been created, you can do either of the following:
  1. Specify the assignment map on the [Lead Classes](#) (CR207000) form for the lead class
  2. Specify the assignment map on the [Customer Management Preferences](#) (CR101000) form

# Notifications About Assigning a Lead to an Owner

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- 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,
  - SMS
  - Acumatica mobile app

# Assigning Leads to Owners and Workgroups: Process Activity

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## 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.

# Lesson 2.2: Managing Emails and Activities

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## Learning Objectives

In this lesson, 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

# Use of Emails and Activities in Acumatica ERP

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- *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)

# Tracking of Communication with Leads in Acumatica ERP

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- 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.
- 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.

# Emails and Activities: To Create an Email

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## 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.

# Emails and Activities: To Track a Phone Call

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## 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.



## Lesson 2.3: Managing Marketing Lists

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### Learning Objectives

In this lesson, 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

# Marketing Lists: To Create a Static Marketing List

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## 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.

# Marketing Lists: To Create a Dynamic Marketing List

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## 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

## Day 3

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# Lesson 2.4: Managing Mass Emails Related to a Marketing List

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## Learning Objectives

In this lesson, you will learn how to send a mass email to the members of a marketing list.

# Mass Emails

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- In Acumatica ERP, you can create a mass email and send it to the intended audience
- Emails can be sent to
  - Members of a marketing campaign
  - Marketing list members
  - Selected contacts
  - Mailing list members
- 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.

# Mass Emails: To Email from a Marketing List

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## 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.



## Lesson 3: Managing Marketing Campaigns



# Lesson 3.1: Managing Marketing Campaigns

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## Learning Objectives

In this lesson, 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

# Marketing Campaigns in Acumatica ERP

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- In Acumatica ERP you can track the leads, opportunities, revenue, and expenses associated with a marketing campaign
  - When you acquire new leads and then create them you can select a marketing campaign as the source of the lead.
  - You can send emails to generate interest among the existing leads
  - Track emails and activities related to nurturing leads during a campaign
  - If a lead is converted to an opportunity, you will be able to track and evaluate the revenue of this marketing campaign.
- Marketing campaigns can be linked to projects within Acumatica to allow for the tracking of specific campaign expenses.

# Preparation of a Marketing Campaign

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- 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.

# Marketing Campaign Stages

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- The following stages are useful in reporting:
  - 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

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- 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

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- 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

# Marketing Campaign Statistics

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- 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

# Integration with Project Accounting

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- Use the project accounting functionality to track the expenses and revenue related to a marketing campaign
- To be able to track campaign expenses, you need to create a specific 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

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## 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.

# Lesson 3.2: Managing Mass Emails Related to a Marketing Campaign

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## Learning Objectives

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

- Create and send a mass email to all customers of a company
- Send a mass email to the members of a marketing list
- Send a mass email to the members of a marketing campaign

# Mass Emails: To Email from a Marketing Campaign

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## 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.



## Lesson 4: Qualifying Leads (Marketing)

# Lesson 4: Qualifying Leads (Marketing)

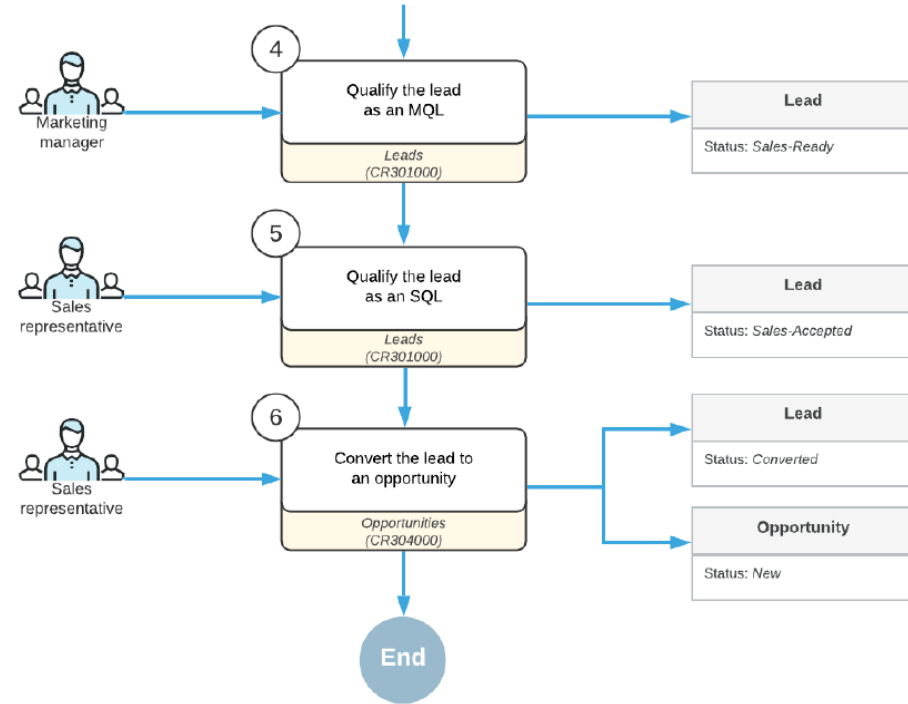
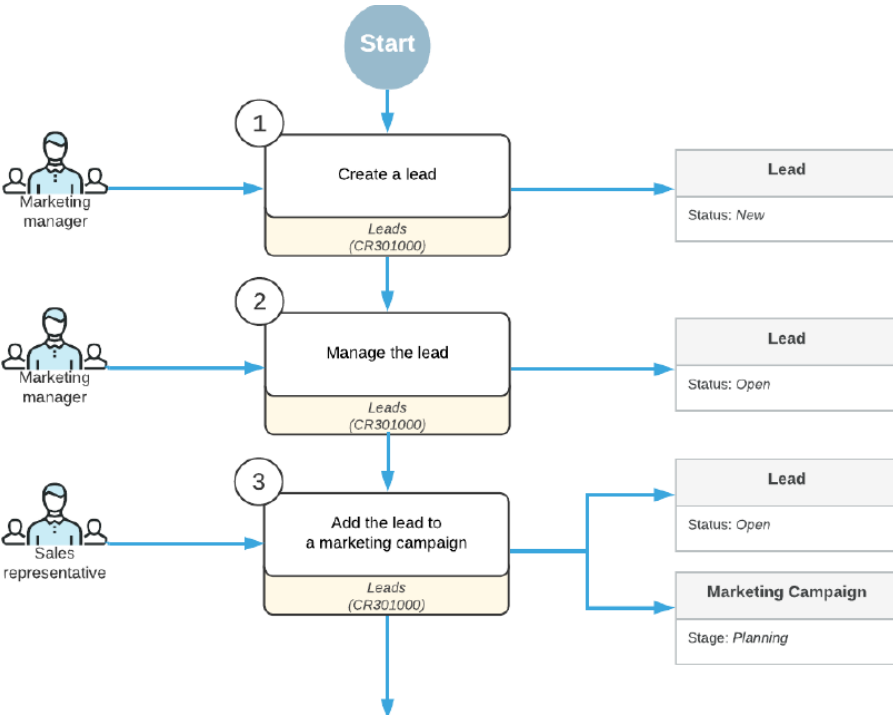
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## Learning Objectives

In this lesson, 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

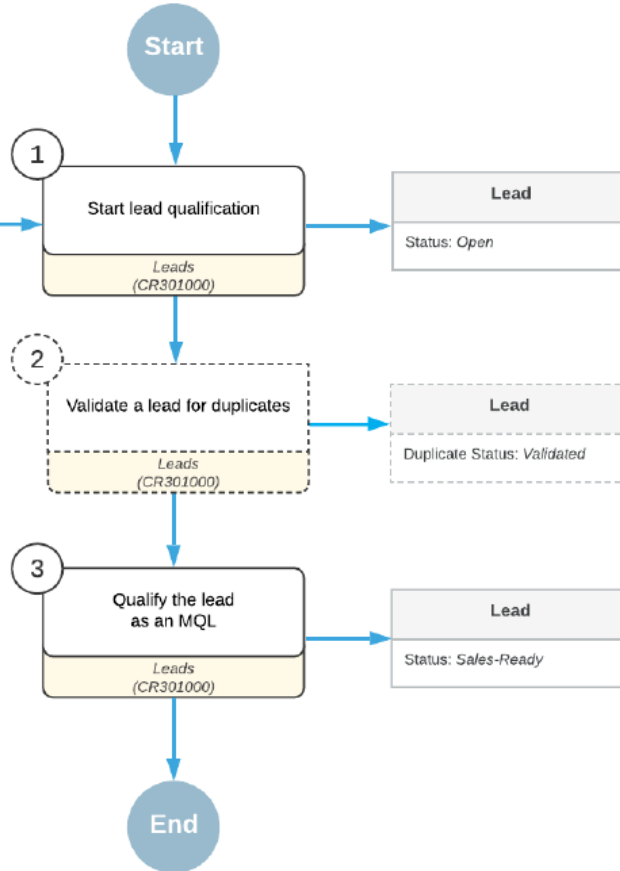
# Lead qualification workflow



# Lead Qualification Workflow (Marketing)

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.



## LEGEND

———— Required action

- - - - - Optional action

# Qualifying Leads (Marketing): To Disqualify a Lead

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## 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.



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# Thank you

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Paul Layton