



CRM Sales Operations

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Lesson 1: Qualifying Leads (Sales)

Day 1

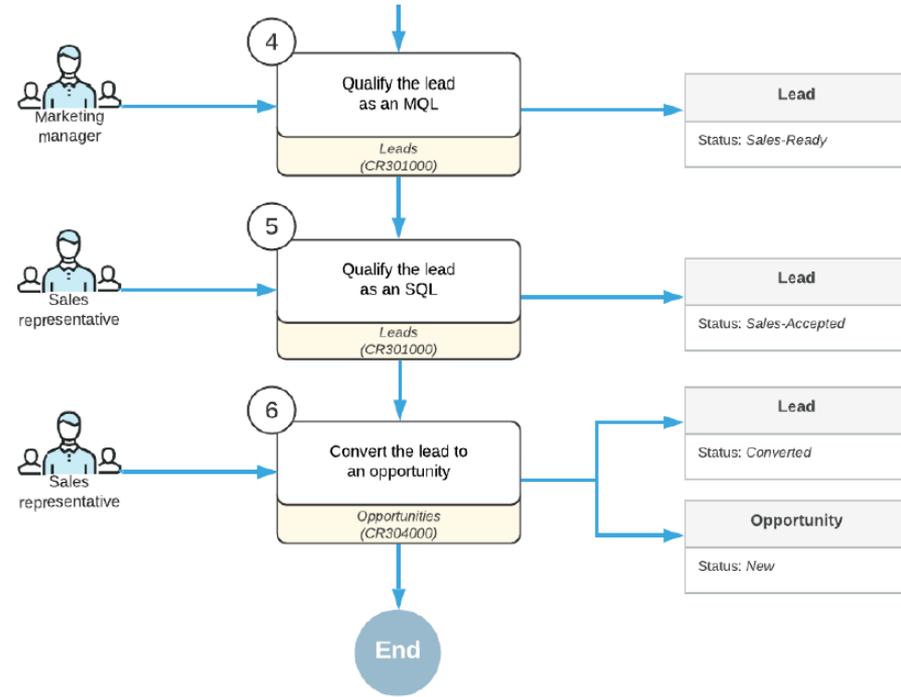
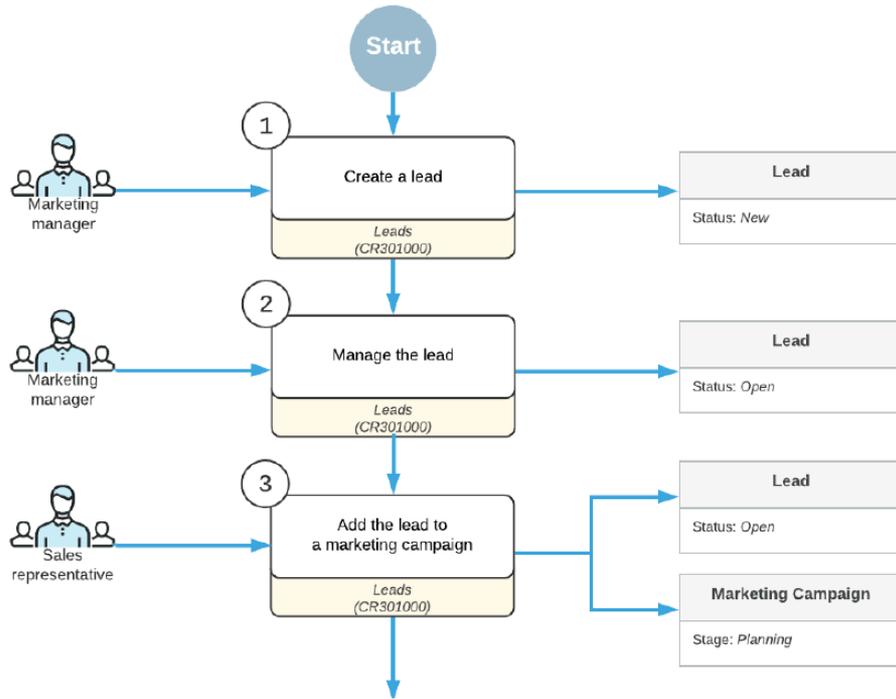
Lesson 1.1: Qualifying Leads (Sales)

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
- Convert a lead to an opportunity
- Disqualify a lead
- Return a lead to marketing for further nurturing
- Reopen a disqualified lead

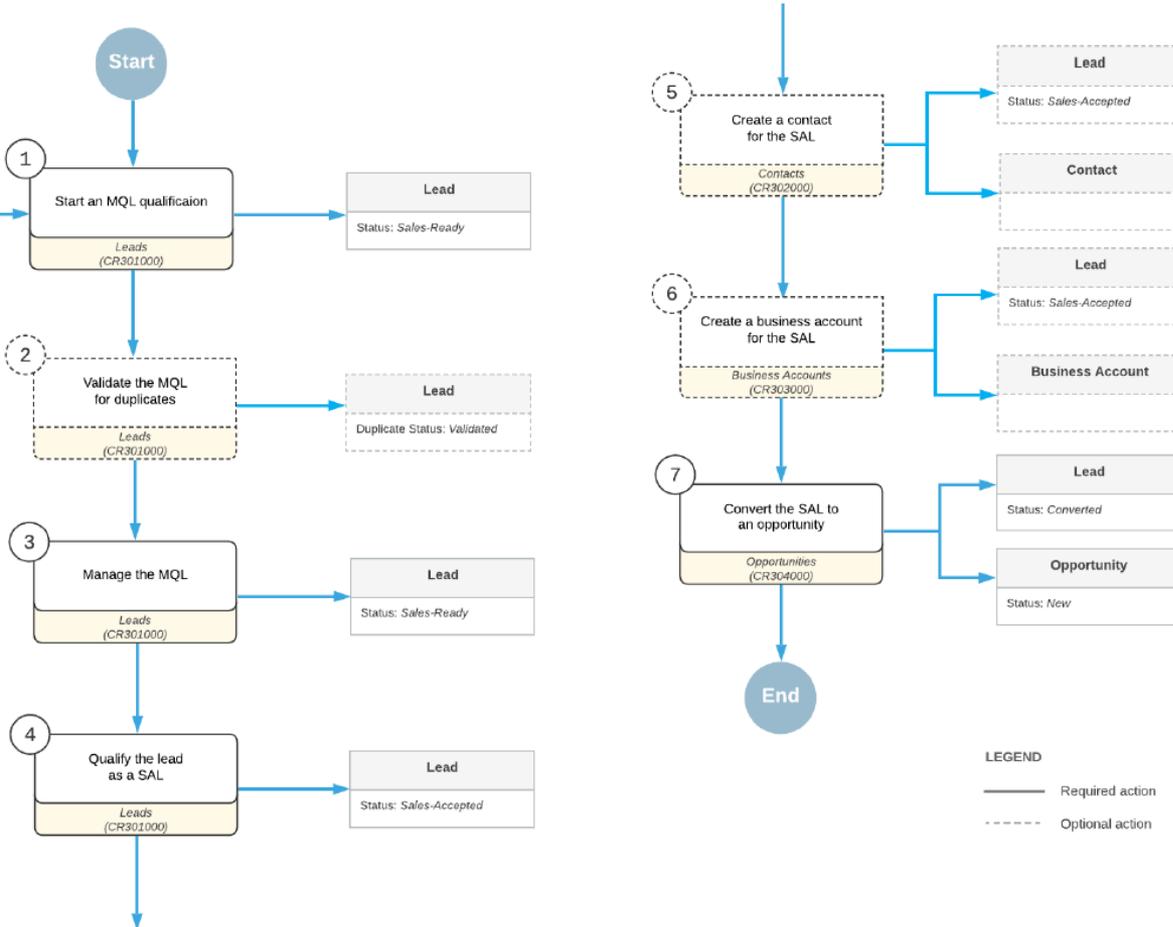
Lead Qualification Workflow



Lead Qualification Workflow (Sales)

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.



Qualifying Leads (Sales): To Convert a Lead to an Opportunity

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 Squeezeo 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.

Qualifying Leads (Sales): To Disqualify a Lead

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.

Lesson 1.2: Creating Business Accounts

Learning Objectives

In this lesson, 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

Business Accounts: To Create a Business Account Manually

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.

Business Accounts: To Create a Business Account by Using the Acumatica Mobile App

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).

Lesson 1.3: Creating Contacts

Learning Objectives

In this lesson, 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

Contacts: To Create a Contact Manually

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.

Contacts: To Create a Contact by Using the Acumatica Mobile App

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.

Day 2

Lesson 1.4: Managing Emails and Activities

Learning Objectives

In this lesson, you will learn how to create an email, an activity of the *Phone Call* type, and a task.

Emails and Activities: To Create an Email

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

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.

Emails and Activities: To Create a Task

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.



Lesson 2: Managing Opportunities

Lesson 2.1: Creating Opportunities

Learning Objectives

In this lesson, 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

Opportunities: To Create an Opportunity Manually

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.

Opportunities: To Create an Opportunity by Using the Acumatica Mobile App

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.

Lesson 2.2: Assigning Opportunities to Owners and Workgroups

Learning Objectives

In this lesson, 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

Assigning Opportunities to Owners and Workgroups: Process Activity

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.

Day 3

Lesson 2.3: Managing Events

Learning Objectives

In this lesson, you will learn how to create an activity of the *Event* type.

Emails and Activities: To Create an Event

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.

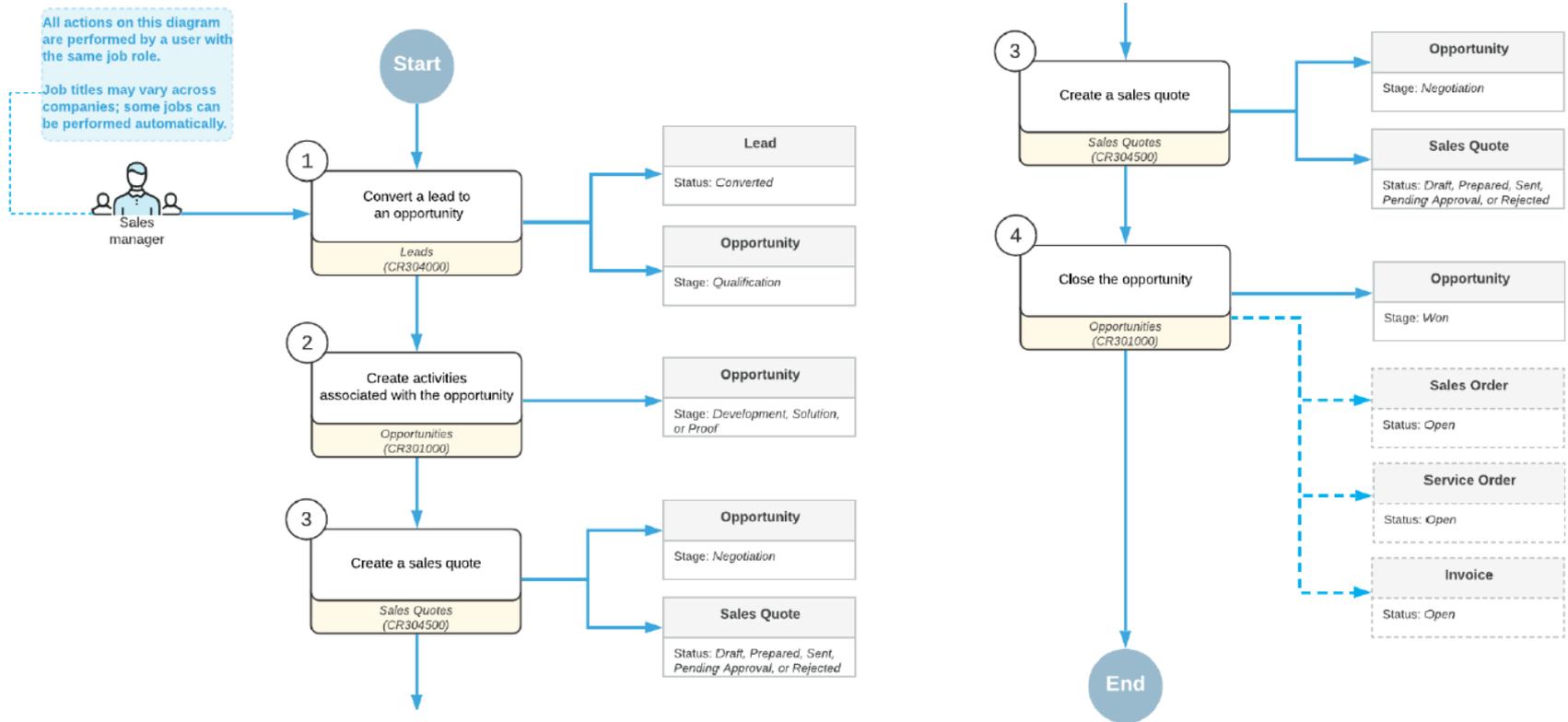
Lesson 2.4: Managing Opportunities

Learning Objectives

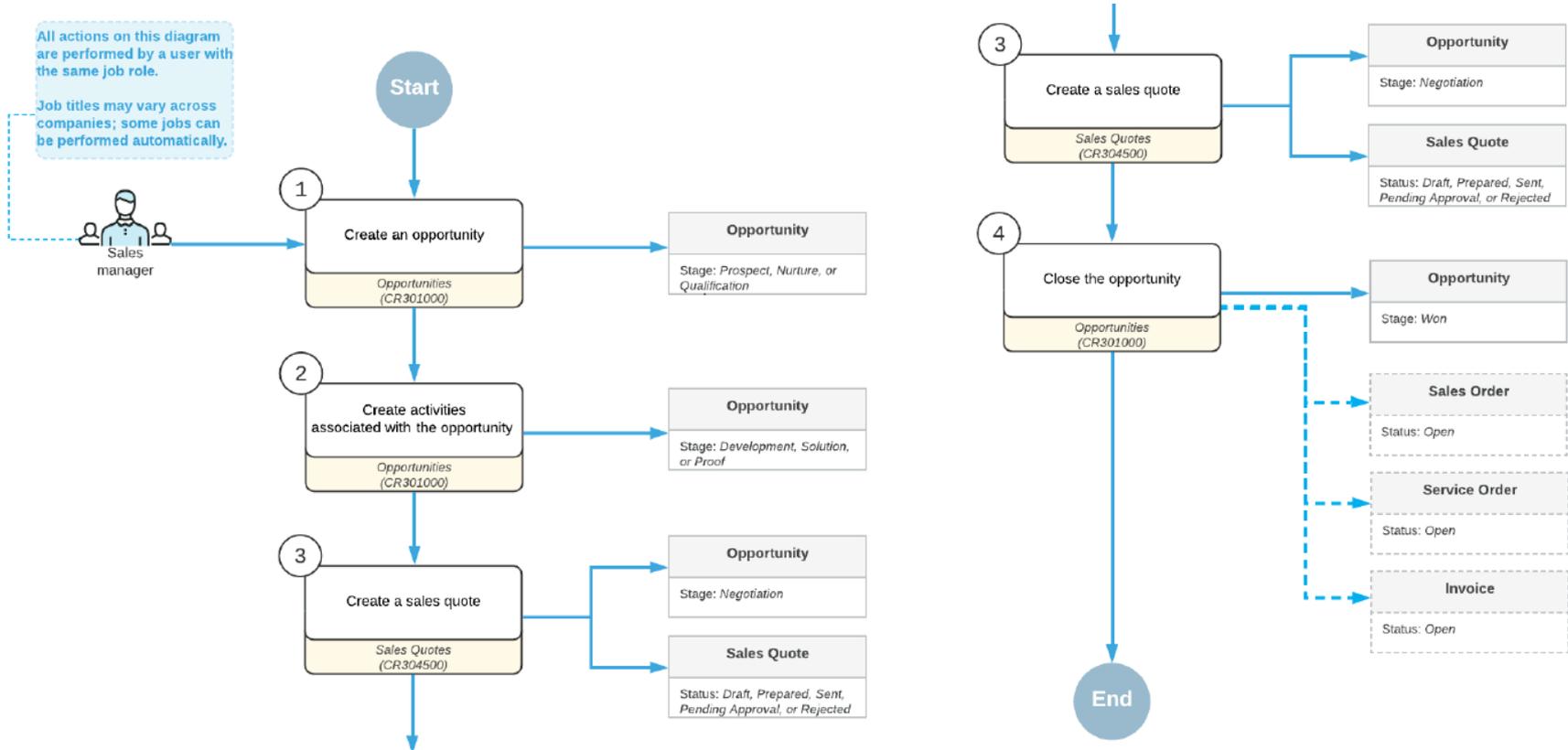
In this lesson, you will learn how to do the following:

- 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

Management of an opportunity that has been created through lead conversion



Management of a manually created opportunity



Managing Opportunities: To Add Products to an Opportunity

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.

Managing Opportunities: To Create a Sales Quote

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 sale

Managing Opportunities: To Create an Opportunity-Based Sales Order

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.

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Thank you

Paul Layton