

End-User Course

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# CRM Marketing Operations

Training Guide

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# Copyright

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# How to Use This Course

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

This course must be completed on Acumatica ERP 2021 R1. For this course, you will use the Acumatica ERP tenant with the *U100* dataset preloaded.

## 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 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 educational purposes of this course, you use Acumatica ERP under the trial license that 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

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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.
- **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.

## 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*.

## 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.

## 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.

# Lesson 1: Acquiring Audience

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## Lesson 1.1: Creating Leads

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### 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 **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

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. 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 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](#) (CR301000) form as additional elements that can be used to specify information about the lead.

An 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.
- 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 100 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, make sure that the *BAKERY* class has been specified.
  6. Optional: 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.

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

The following activity demonstrates how to create a lead by using the Acumatica add-in for Outlook and quickly update the lead information in the system.



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. 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.

### Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following features have been enabled on the [Enable/Disable Features](#) (CS100000) form.

- *Customer Management*
- *Outlook Integration* in the *Third Party Integrations* group of features

The Acumatica add-in for Outlook should be installed for your Microsoft Outlook application. For details, see [Acumatica Add-In for Outlook](#).

### Process Overview

In this activity, you will create a new lead in the system by using the Acumatica add-in for Outlook and quickly edit the lead's contact information on the [Leads](#) (CR301000) form.

### System Preparation

Before you start creating a new lead in the system by using the Acumatica add-in for Outlook, you should do the following:

1. Launch the Microsoft Outlook app or Outlook on the web.

2. Click the Acumatica button.
3. Sign in to the system as a marketing manager Bill Owen by using the following credentials:
  - Username: *owen*
  - Password: *123*

### Step 1: Creating a Lead by Using the Acumatica Add-In for Outlook

To create a new lead by using the Acumatica add-in for Outlook, do the following:

1. Select an email from the lead.



You can select any email from your incoming mail.

2. Click the Acumatica button.
3. On the Acumatica add-in for Outlook form, which opens, click **Create Lead**.
4. In the **Info** section, which appears on the add-in for Outlook form, notice that the values in the **First Name**, **Last Name**, and **Email** boxes have been populated with the information from the email.
5. Optional: In the **Info** section, specify the information as follows:



You do not usually need to manually specify a lead's first name, last name, and email address (though you can correct these values as needed), but because you cannot have an email from the lead specified in this activity, we recommend that you correct the lead's contact information.

- a. In the **First Name** box, type *Stephanie*.
  - b. In the **Last name** box, type *Andrews*.
  - c. In the **Email** box, type *s.andrews@muffin.secret.example.com*
  - d. In the **Position** box, type the lead's job title or position: *Purchasing Manager*.
  - e. In the **Company Name** box, type *Muffin Secret*.
  - f. In the **Source** box, select the source of the lead: *Other*.
  - g. In the **Country** box, select the country of the lead: *US*.
6. Click **Create Lead** to create the lead in the system.



You can click **View Lead** to view the lead record on the [Leads](#) (CR301000) form, which opens in a pop-up window, and add or change the lead data if needed.

You have created a new lead in the system by using the Acumatica add-in for Outlook.

## Step 2: Updating the Lead's Information by Using the Acumatica Add-In for Outlook

Suppose that you have scanned the email from Stephanie Andrews once again and noticed her company address. You need to quickly add this address to the system.

To update the lead's information by using the Acumatica add-in for Outlook, do the following:

1. While you are still viewing the lead's contact details on the Acumatica add-in for Outlook form, click **View Lead**. The *Leads* (CR301000) form opens in a pop-up window.
2. In the **Address** section on the **Contact Info** tab, do the following:
  - a. In the **Address Line 1** box, type 2359 Southern Street.
  - b. In the **City** box, type New York.
3. On the form toolbar, click **Save** to save your changes.
4. Close the pop-up window.

You have updated the lead's information in the system by using the Acumatica add-in for Outlook.

## Lesson 1.2: Validating Records for Duplicates

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### 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

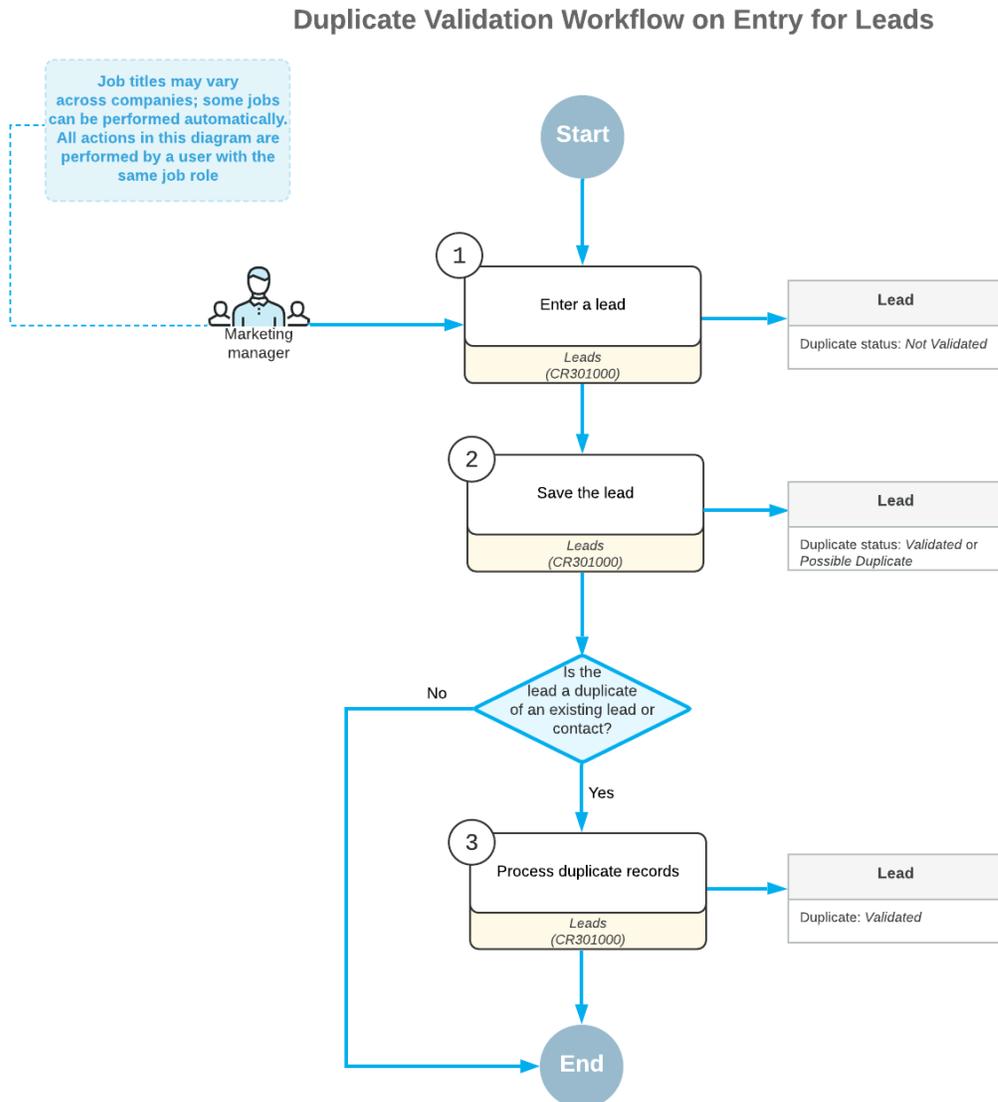
The following description of validating records for duplicates is specific to leads, but duplicate validation on entry is performed similarly for both leads and contacts.

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.



## 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 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.

### 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, restaurants, 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 all 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 2: Managing Audience

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## Lesson 2.1: Assigning Leads to Owners and Workgroups

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### 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 can be used 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.

- 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 2.2: Managing Emails and Activities

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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 [Emails and Activities: Tasks](#) and [Emails and Activities: Events](#) Help topics.

### 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 on **Details** tab of the [Activity](#) (CR306010), [Task](#) (CR306020), or [Event](#) (CR306030) form. 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 unpin 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 *Task* activity type.
-  is used for the *Event* activity type.
-  is used for the *Email* 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 **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](mailto: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 2.3: Managing Marketing Lists

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### 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 will walk you through the process of working with 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:** JCR300FF
  - **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*.
3. On the form toolbar, click **Save**.

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 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: 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 2.4: Managing Mass Emails Related to a Marketing List

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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 3.2: 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 *JCR200FF* 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.
- The system email account has been specified as the default system account on the [Email Preferences](#) (SM204001) 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 *JCR200FF* 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 *JCR200FF* 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 *JCR200FF* 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 message. 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 3: Managing Marketing Campaigns

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## Lesson 3.1: Managing Marketing Campaigns

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### 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 *JCR200FF* 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.
6. On the form toolbar, click **Save**.

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 *JCR200OFF*.

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 3.2: Managing Mass Emails Related to a Marketing Campaign

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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 2.4: 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: General Information

Mass email marketing is a tool that helps you quickly connect with your marketing audience through newsletters, announcements, or offers. This topic provides information about managing mass emails in Acumatica ERP.

## Learning Objectives

In this chapter, 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

## Applicable Scenarios

You may want to learn how to manage mass emails in Acumatica ERP in scenarios that include the following:

- You have launched a marketing campaign and need to send a special offer to a group of leads.
- You need to send a company newsletter to the company's potential clients.
- You need to inform your marketing audience about the company's new products or services.

## 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* 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.
  - *Scheduled Processing* in the *Monitoring & Automation* group of features: 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.
- The system email account has been specified as the default system account on the [Email Preferences](#) (SM204001) 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 *JCR200OFF*. 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 message. 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 4: Qualifying Leads (Marketing)

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The activity that describes how to disqualify a lead is presented in both CRM Marketing and CRM Sales training guides. If you have completed the [Qualifying Leads \(Sales\): To Disqualify a Lead](#) activity in the CRM Sales training guide, you need not complete the [Qualifying Leads \(Marketing\): To Disqualify a Lead](#) activity in this guide.

### Qualifying Leads (Marketing): General Information

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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.

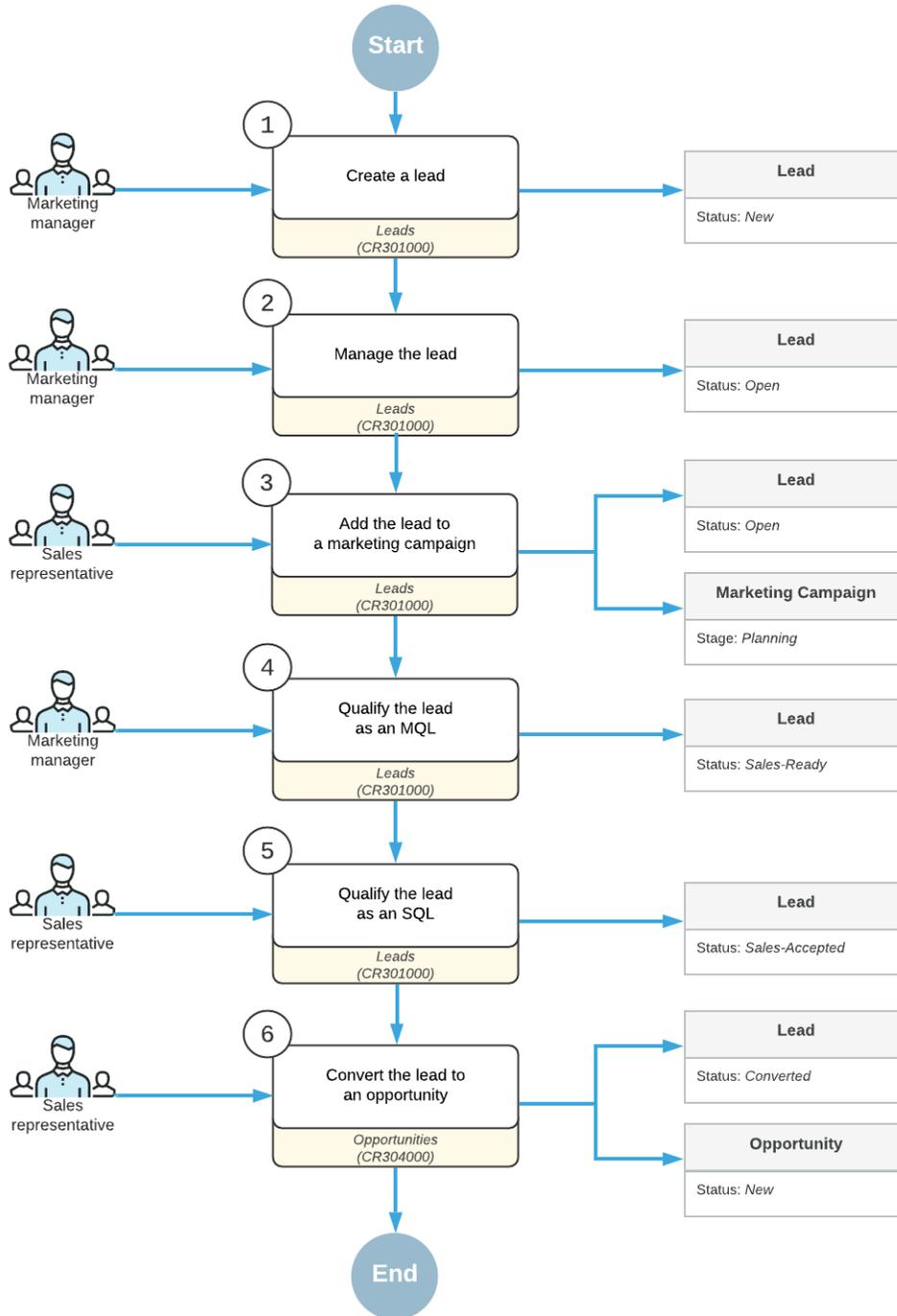
We recommend that marketing and sales teams work together to agree on the criteria of transferring leads from marketing to sales and regularly revise the criteria depending on company sales and other changing conditions. Based on this agreement, in Acumatica ERP, you can create your lead qualification 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:

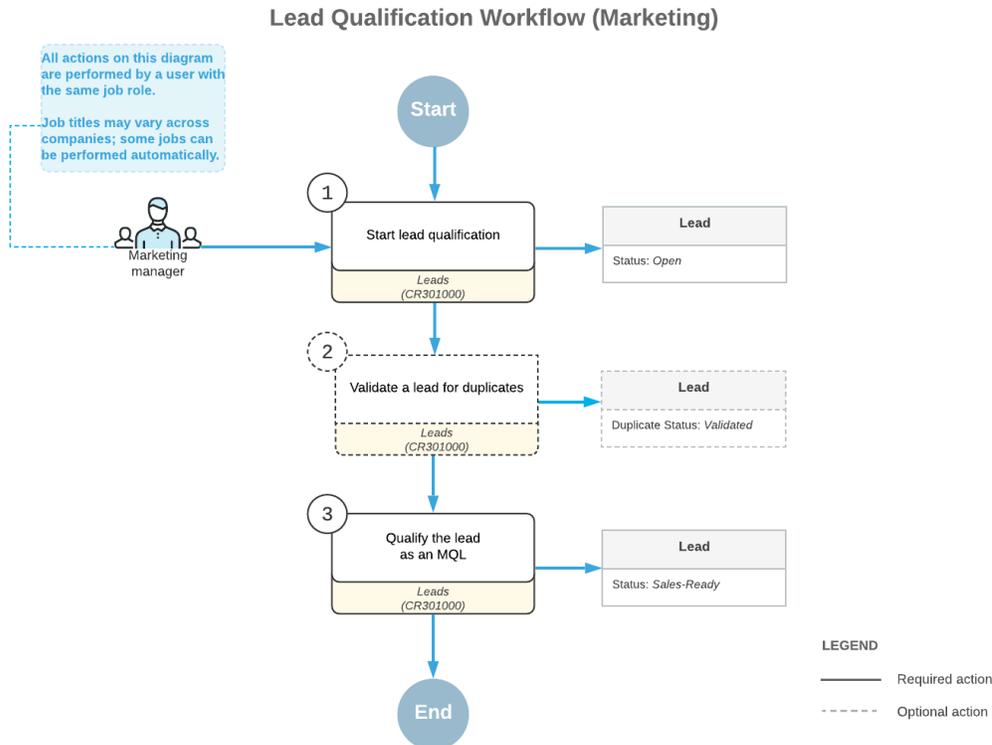
- Starting the lead qualification process by clicking **Actions > Open** for the lead on the form toolbar of the [Leads](#) (CR301000) form
- Validating the lead for duplicates, as described in [Validating Records for Duplicates](#)
- Assigning the lead to an owner, as described in [Assigning Leads to 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.