

End-User Course

CRM Sales Operations

Training Guide

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How to Use This Course

This course introduces you to the Acumatica ERP CRM functionality based on a set of examples that illustrate CRM sales 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 sales 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

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: Qualifying Leads (Sales)

Lesson 1.1: Qualifying Leads (Sales)

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 \(Marketing\): To Disqualify a Lead](#) activity in the CRM Marketing training guide, you need not complete the [Qualifying Leads \(Sales\): To Disqualify a Lead](#) activity in this guide.

Qualifying Leads (Sales): General Information

Marketing and sales teams rapidly adjust their processes and optimally use collected data, striving for the most effective work approaches. As such, they need their CRM systems to be flexible enough to support adjustments in processes without lengthy, costly development being required. Acumatica ERP provides flexible tools that marketing and sales teams can use to implement and customize workflows in the system without doing the coding.

Learning Objectives

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

- Use the lead states in Acumatica ERP in your lead qualification workflow
- Convert a lead to an opportunity
- Disqualify a lead
- Return a lead to marketing for further nurturing
- Reopen a disqualified lead

Applicable Scenarios

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

- You have obtained a lead from marketing: The marketing team has qualified a lead as a marketing-qualified lead (MQL), and your manager has assigned the lead to you. You need to get in touch with the lead and find out (qualify) if the organization is interested in the product. If so, you need to convert the lead to an opportunity.
- A lead has contacted you and confirmed the intention to buy the company's products or services, and you need to convert the lead to an opportunity.
- A lead has expressed that its organization is not interested in your company's products or services, and you need to disqualify the lead.
- You need to return a lead that is not yet ready to buy to a marketing team for further nurturing.

Lead Qualification Process

Lead qualification is the process of determining a lead to be one of the following:

- A prospect that fits your target customer profile and has a high chance to become a customer

- An existing customer with interest in a product or service that this customer has not already purchased

When marketing personnel communicate with leads (for example, during marketing campaigns) and work on developing the leads' interest in the company's products or services, they establish qualification criteria, which show that some leads are interested to buy more than others. The particular lead qualification criteria vary for different companies and for different products or services. The number of leads that a marketing team passes to a sales team depends on many factors, such as the sales team's requirements for leads or the number of the leads a sales team can handle.

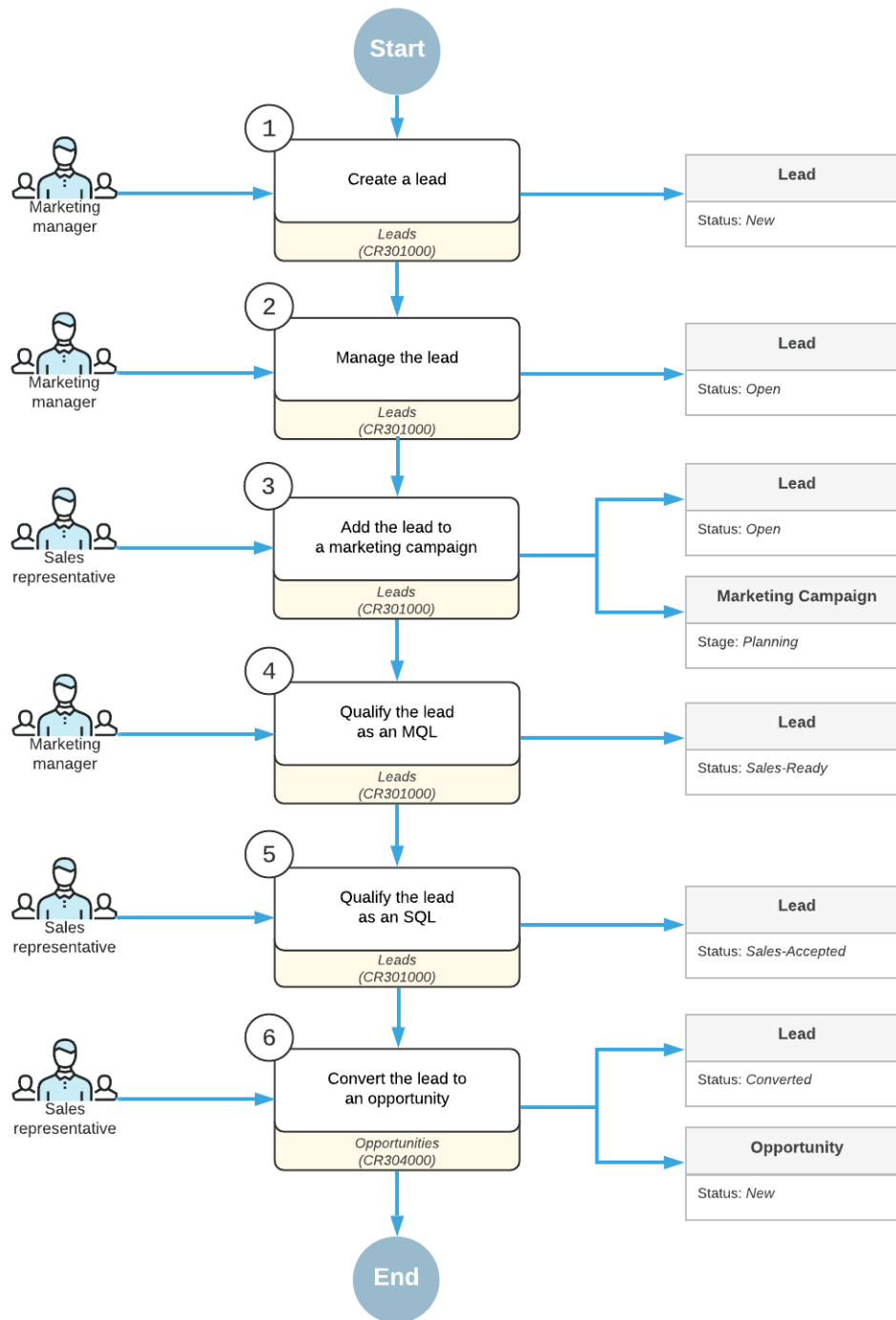
We recommend that marketing and sales teams work together to agree on the criteria of transferring leads from marketing to sales and regularly revise the criteria depending on company sales and other changing conditions. Based on this agreement, in Acumatica ERP, you can create your lead qualification workflow, which consists of stages (identifiable phases, which can be required or optional) in the workflow that relate to particular actions a marketing or a sales employee performs while qualifying each lead. Similarly, the lead proceeds through states—which are represented by statuses in the system—for each stage. The following sections describe this workflow and the ability to implement it in Acumatica ERP.

Lead Qualification Workflow

CRM functional area in Acumatica ERP includes the lead qualification workflow that helps marketing and sales teams manage leads, add leads to marketing campaigns, qualify leads, associate multiple leads with the same business account and contact, return leads that require further nurturing to marketing and reopen a disqualified lead if needed. You can customize the workflow according to your company's lead qualification processes.

The following diagram illustrates the lead qualification workflow.

Lead Qualification Workflow



In the lead qualification workflow, transitions between lead states are implemented as actions on the [Leads](#) (CR301000) form. You can click these actions on the **Actions** menu on the form's toolbar. A lead state is displayed in the **Status** box of the Summary area on the [Leads](#) form. A system administrator

can customize the workflow to define which states correspond to the *Active* (nurtured) state of the lead.

Lead Qualification as Performed by Sales in Acumatica ERP

When a sales team starts working with a lead, the lead qualifier (for example, a telemarketer or a sales representative) can contact and qualify the MQL, and then record the results in the system. If a lead is not yet ready to buy, a sales manager can return the lead to the marketing team for further nurturing. If the lead confirms interest in the company's products or services, the lead qualifier qualifies the lead as sales-accepted (SAL) and the sales team can take further follow-up actions on the lead, such as converting the lead to an opportunity and creating a contact and a business account for the lead in the system. A lead converted to an opportunity becomes a sales-qualified lead (SQL).

Lead qualification by a sales team may include the following steps to move the lead through the needed stages:

- Validating the lead for duplicates, as described in [Validating Records for Duplicates](#).
- Assigning the lead to an owner, as described in [Assigning Leads to Owners and Workgroups](#).
- Communicating with the lead, as described in [Managing Emails and Activities](#) and [Managing Mass Emails](#).
- Accepting the lead for follow-up actions by clicking **Actions > Accept** for the lead on the form toolbar of the [Leads](#) (CR301000) form.
- Creating a contact for the lead, as described in [Creating Contacts](#).
- Creating a business account for the lead, as described in [Creating Business Accounts](#).
- Converting the lead to an opportunity by clicking **Actions > Convert to Opportunity** for the lead on the form toolbar of the [Leads](#) form. During this process, you specify basic settings for the opportunity, which will be created on the [Opportunities](#) (CR304000) form, and create a contact and a business account for the lead if they have not yet been created. Creation of a business account may be required or optional depending on the setting on the [Lead Classes](#) (CR207000) form: If the **Require Account for Conversion to Opportunity** check box (**Conversion Settings** section of the **Details** tab) is cleared, the creation of a business account will be skipped when the lead is converted to an opportunity.
- Returning the lead to the marketing team for further nurturing by clicking **Actions > Open** for the lead on the form toolbar of the [Leads](#) form.
- Disqualifying a lead by clicking **Actions > Disqualify** for the lead on the form toolbar of the [Leads](#) form.
- Reopening a lead that has been disqualified by clicking **Actions > Open** for the lead on the form toolbar of the [Leads](#) form.

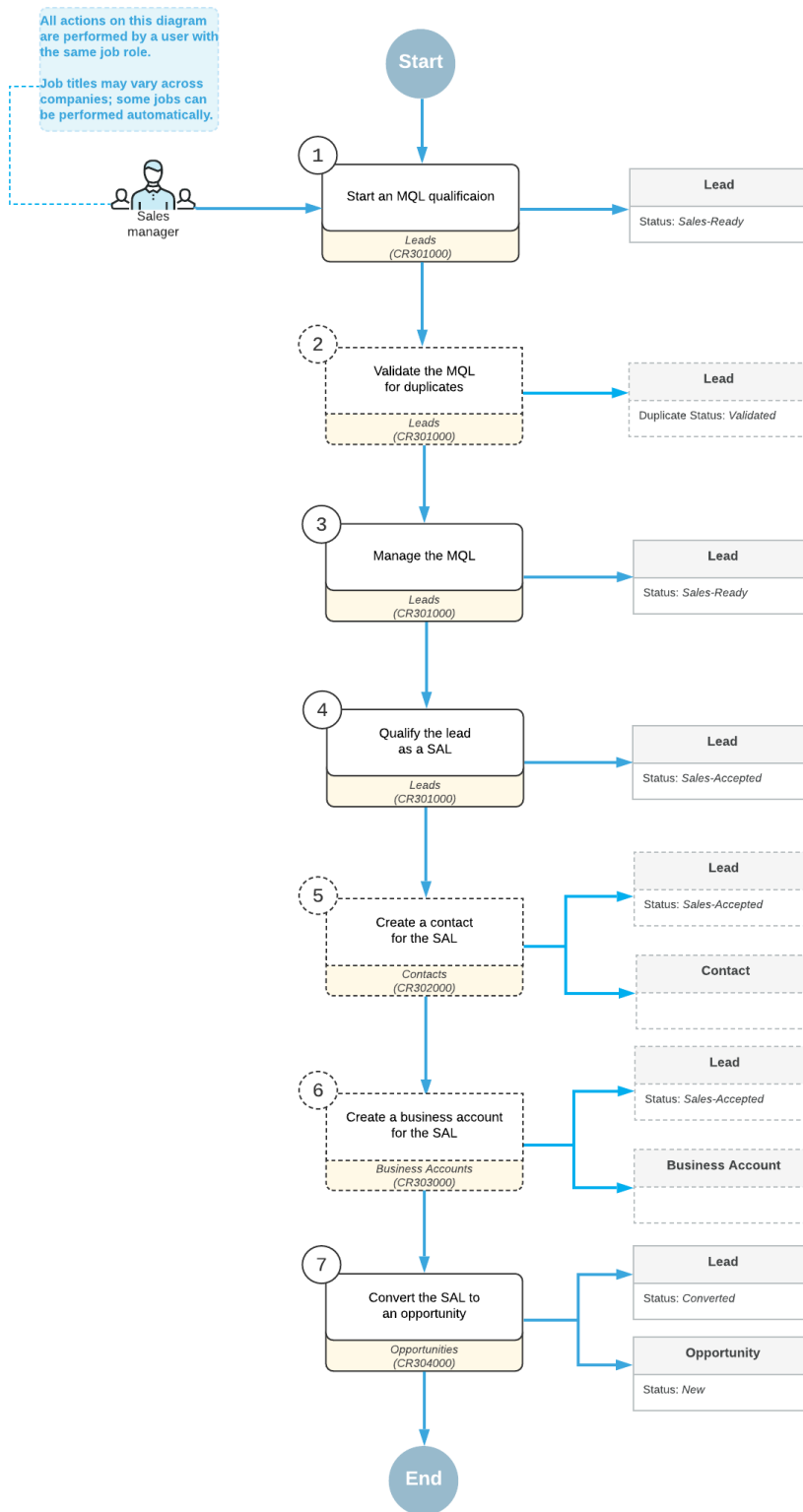


Any of the stages listed above may be skipped as needed, depending on the company's lead qualification processes for sales.

Lead Qualification Workflow (Sales)

The following diagram illustrates the lead qualification workflow as performed by a sales team.

Lead Qualification Workflow (Sales)



Lead Qualification States

As a lead is being processed by marketing and sales teams, it progresses through various states. Each lead state is represented in the system by a status, which is displayed in the **Status** box in the Summary area of the [Leads](#) (CR301000) form. Lead statuses are updated by the system, and the **Status** box is unavailable for editing. A user can initiate transitions between lead states—which causes the system to update the status accordingly—by performing actions on the [Leads](#) form.

In Acumatica ERP, a lead can be assigned one of the following statuses:

- *New*: The lead has been created in the system, but no work has been done on it yet.
- *Open*: The lead is being qualified by the marketing team.
- *Sales-Ready*: The lead has been qualified by a marketing team as showing more interest in the organization's products or services than other leads.
- *Sales-Accepted*: The lead has been initially reviewed and accepted by the lead qualification team, and it is willing to communicate more with the sales team for further qualification.
- *Converted*: The lead has been qualified and converted to an opportunity. Once a lead has this status, most of the boxes on the [Leads](#) form are read-only; you can edit the value in only the **Description** box in the Summary area.
- *Disqualified*: The lead is showing no interest in the organization's products or services, or is not reachable (for example, the contact information is not valid). This status may also be used for leads that are duplicates of more correct or detailed leads. For more information about finding duplicates among CRM records in Acumatica ERP, see [Validating Records for Duplicates](#).

If a lead has the *New*, *Open*, *Sales-Ready*, or *Sales-Accepted* status, the **Active** check box on the **CRM Info** tab of the [Leads](#) form is selected by default to indicate that the lead can be nurtured by a marketing or sales team. The system clears the check box if the lead has the *Converted* or *Disqualified* status.

During lead qualification, some states may not be needed: For example, in a small company, the same team members might work with leads that are both ready for sales and accepted by sales, and thus one state could be used for leads that are turned over to sales, instead of two.

Processing of a Lead Through States

As you work with a lead on the [Leads](#) (CR301000) form, you can select any of the following actions on the form toolbar to move a lead through states (which causes the system to change the statuses accordingly):

- **Open**: Opens the **Details** dialog box, where you select the reason for opening the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Open*. This action is available when the status of the lead record is *New*, *Sales-Ready*, *Sales-Accepted*, *Converted*, or *Disqualified*.
- **Qualify**: Opens the **Details** dialog box, where you select the reason for qualifying the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Sales-Ready*. This action is available when the status of the lead record is *New* or *Open*.
- **Accept**: Opens the **Details** dialog box, where you select the reason for accepting the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Sales-Accepted*. This action is available when the status of the lead is *New*, *Open*, or *Sales-Ready*.

- **Disqualify:** Opens the **Details** dialog box, where you select the reason for disqualifying the lead and confirm that you want the system to perform the action. The status of the lead will be changed to *Disqualified*. This action is available if the status of the lead record is *New*, *Open*, *Sales-Ready*, or *Sales-Accepted*.
- **Convert to Opportunity:** Opens the **New Opportunity** dialog box, where you can enter the initial data that is required to create an opportunity. By using that dialog box, you can create a new contact and business account for the lead, if needed, or review the basic settings of the existing ones. The action is available if the status of the lead record is *New*, *Open*, *Sales-Ready*, or *Sales-Accepted*.

A system administrator can configure notifications related to lead statuses. For more information, see [Using Business Events](#).

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

The following activity demonstrates how to convert a lead to an opportunity in Acumatica ERP.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have obtained a lead from the marketing team, which has qualified the lead and your manager has assigned the lead to you. Christina Taylor, a manager at SweetTooth Cafe, visited the company's official website, chose a pro series juicer made by Squeezo Inc., and would like to buy the juicer. You need to get in touch with the lead and find out if Christina is interested in the product. If so, you need to convert the lead to an opportunity.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled.
- On the [Lead Classes](#) (CR207000) form, the *CAFE* lead class, which defines SweetLife's leads that represent employees from cafes and restaurants, has been created.
- On the [Contact Classes](#) (CR205000) form, the *CAFE* contact class has been created.
- On the [Opportunity Classes](#) (CR209000) form, the *PRODUCT* opportunity class has been created.
- On the [Leads](#) (CR301000) form, the *Christina Taylor* lead has been created.

Process Overview

In this activity, you will convert a lead to an opportunity on the [Leads](#) (CR301000) form.

System Preparation

Before you start converting the lead to an opportunity, you should do the following:

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

Step: Converting a Lead to an Opportunity

To convert the *Christina Taylor* lead to an opportunity, do the following:

1. Open the Leads (CR3010PL) form.
2. In the **Display Name** column, click the *Christina Taylor* link to open this lead on the [Leads](#) (CR301000) form.



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

3. On the form toolbar, click **Actions > Convert to Opportunity**.
4. In the **New Opportunity** dialog box, which opens, do the following:
 - a. In the **Contact** section of the **Main** tab, notice that the system has inserted contact settings specified in the **Contact** section of the [Leads](#) form.



You can change the settings of the contact or add any missing settings, if needed.

- b. In the **Subject** box of the **Opportunity** section, specify *Purchase of JUICER10*.
- c. In the **Opportunity Class** box, select *PRODUCT*.
- d. In the **Business Account ID** box of the **Business Account** section, specify *SWEETTOOTH*.



If on the [Lead Classes](#) (CR207000) form (**Conversion Settings** section of the **Details** tab) the **Require Account for Conversion to Opportunity** check box is cleared, a business account is not required in order to convert a lead to an opportunity. In this case, the dialog box does not contain the **Business Account** section.

- e. In the **Business Account Class** box, select *CAFE*.
- f. At the bottom of the dialog box, **Create**.

The system closes the dialog box, converts the lead to an opportunity that is created on the [Opportunities](#) (CR304000) form, creates a contact and a business account for the lead, and returns you to the [Leads](#) form. On the form, notice that the status of the lead is *Converted* and that values have been inserted in the **Contact** and **Business Account** boxes of the Summary area. Also notice that most of the settings in the Summary area and on the **Contact Info**, **CRM Info**, **Attributes**, and **Campaigns** tabs have become unavailable for editing.



If you click **Create and Review** instead of **Create** in the **New Opportunity** dialog box, the system closes the dialog box, converts the lead to an opportunity, creates a contact and a business account for the lead (if these did not already exist and their settings have been specified in the dialog box), and opens the [Opportunities](#) form, on which you can view the settings of the opportunity, make any needed changes, and save the updated opportunity.

You have converted the lead to an opportunity.

Qualifying Leads (Sales): To Disqualify a Lead

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



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

Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have launched an advertising campaign to promote a new series of commercial juicers. The audience is a group of leads that have shown interest in these juicers. During the campaign, you have sent emails with the product descriptions and a survey to gauge the audience's interest in the products. John Livier, the head of the client services department at the Snow Park Restaurant, responded to your survey that the company is no longer interested in commercial juicers. Thus, you need to disqualify the *John Livier* lead.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled.
- On the [Lead Classes](#) (CR207000) form, the *CAFE* class, which defines SweetLife's leads representing employees from cafes and restaurants, has been created.
- On the [Leads](#) (CR301000) form, the *John Livier* lead has been created.

Process Overview

In this process activity, you will disqualify a lead on the [Leads](#) (CR301000) form.

System Preparation

Before you start disqualifying a lead, you should do the following:

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

Step: Disqualifying a Lead

To disqualify the *John Livier* lead, do the following:

1. Open the Leads (CR3010PL) form.
2. In the **Display Name** column on the Leads (CR3010PL) form, click the *John Livier* link to open this lead record on the [Leads](#) (CR301000) form.



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

3. On the form toolbar, click **Actions > Disqualify**.
4. In the **Details** dialog box, which opens, select the reason and confirm the action as follows:
 - a. In the **Reason** box, select *No Interest*.
 - b. Click **OK**.

The system closes the dialog box and changes the status of the lead to *Disqualified*. Most of the settings in the Summary area and on the **Contact Info**, **CRM Info**, **Attributes**, **Campaigns**, and **Opportunities** tabs have become unavailable for editing.

You have disqualified the lead.

Lesson 1.2: Creating Business Accounts

Business Accounts: General Information

As you work with prospective customers, you need to create business accounts in the system, which can later be extended as customer accounts. (They can also be extended as vendor accounts if your company purchases some products or services from the company.) This topic provides information about creating business accounts in Acumatica ERP.

Learning Objectives

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

- Become familiar with ways of creating business accounts
- Create a business account manually
- Specify a primary contact for the business account
- Create a business account by using the Acumatica ERP mobile app
- Learn about the synchronization of settings in leads, contacts, and business accounts

Applicable Scenarios

You may want to learn how to create business accounts in scenarios that include the following:

- An employee of your company has contacted the lead and confirmed the contact information and the interest in company's products or services, and you need to convert the lead to an opportunity.
- You have been assigned to the lead whose contact information and interest in company's products or services has been confirmed, and you need to convert the lead to an opportunity.

Business Accounts in Acumatica ERP

In Acumatica ERP, a business account is a record on the [Business Accounts](#) (CR303000) form that represents a legal entity (a company or an individual) that your company deals with or intends to sell products and services to; it is generally created in the system when your company is marketing its products or services to the business account. This business account can later be extended as a customer (or as a vendor; a business account can be extended as both a customer and a vendor if you sell products or services to this account and buy products or services from it).

A lead and a contact (or multiple leads and contacts) in the system—which are created on the [Leads](#) (CR301000) form and the [Contacts](#) (CR302000) form, respectively—may be associated with a business account. To create a business account, you need to specify a contact for this account. If the needed contact has already been created in the system, you can create a business account and associate the contact with the account. If the needed contact has not been created in the system, the system will create it when you are creating the business account. When you are creating a new business account based on a lead that exists in the system, the system automatically copies the contact information specified on the [Leads](#) form from the lead to the business account.

Creation of Business Accounts in Acumatica ERP

The broader process of creating a business account in Acumatica ERP, which is maintained on the [Business Accounts](#) (CR303000) form, consists of the following steps:

1. Optional: If you are creating a business account based on an existing lead, validating this lead for duplicates. For details, see [Validating Records for Duplicates](#).
2. Creating the business account (from a lead, contact, through lead conversion to an opportunity, or manually).
3. Optional: Creating a contact associated with the business account.
4. Specifying a primary contact for the business account.

You can create a business account in any of the following ways:

- On the [Leads](#) (CR301000) form when you convert the lead selected on the form to an opportunity: You click **Actions > Convert to Opportunity** on the form toolbar. In the **New Opportunity** dialog box, which opens, you specify the opportunity and business account settings (specifying business account settings may be required or optional depending on conversion settings on the [Lead Classes](#) (CR207000) form for the lead). You then click **Create** or **Create and Review** to create the opportunity and business account. For detailed instructions, see [Qualifying Leads \(Sales\): To Convert a Lead to an Opportunity](#).
- On the [Leads](#) or [Opportunities](#) (CR304000) form if you create a business account associated with the lead or opportunity selected on the form: You click **Actions > Create Account** on the form toolbar. In the **New Account** dialog box, which opens, you specify the basic business account and contact settings, and then you click **Create** or **Create and Review** to create the business account.
- On the [Contacts](#) (CR302000) form if you create a business account associated with the contact selected on the form: You do this by clicking **Actions > Create Account** on the form toolbar. In the **New Account** dialog box, which opens, you specify the business account settings and click **Create** or **Create and Review** to create the business account.
- Directly on the [Business Accounts](#) (CR303000) form: In this case, you add a new record and manually enter the settings of the new business account.
- Directly by using the Acumatica mobile app. For detailed instructions, see [Business Accounts: To Create a Business Account by Using the Acumatica Mobile App](#).

Regardless of how you create the business account, you can select a business account class in the **Class** box on the [Business Accounts](#) form or in one of the dialog boxes mentioned above, which causes the system to insert default settings for the business account, easing the process of content creation. (For details, see [Defining Business Account Classes](#).)

Once a business account has been created, you can associate one or multiple leads or contacts with the business account and select a primary contact for it, as described in the following section.

Creation of Contacts Associated with a Business Account

When you create a business account on the [Leads](#) (CR301000) or [Contacts](#) (CR302000) form by specifying the business account and contact settings in the **New Account** dialog box, the system also creates a contact and associates this contact with the business account. On the [Business Accounts](#) (CR303000) form, you can view and modify the address details of the contact on the **General** tab and view the contact settings of the contact on the **Contacts** tab. On the **Contacts** tab, you can also create as many contacts associated with the business account as needed.

We recommend that you specify a primary contact associated with the business account, as described in the following section.

Primary Contact for a Business Account

In Acumatica ERP, you can specify a primary contact for a business account. A primary contact is the contact whose contact and address settings the system uses as the default contact for the associated records and documents that have contact settings on them, such as an opportunity created for the business account on the [Opportunities](#) (CR304000) form, thus ensuring that the contact who officially represents the business is used in these records. A primary contact gives you the following abilities:

- Quickly add to the system the contact information of a business and the official representative of this business

- Easily differentiate between the contact information of the business and the official representative of this business
- View the contact information of both the business and the official representative of this business on the same tab (the **General** tab) of the [Business Accounts](#) (CR303000) form.

Only one primary contact can be selected for a business account. On the **General** tab of the [Business Accounts](#) form, you can specify or change the primary contact. On the **Contacts** tab of this form, you can select any contact associated with the business account as the primary one by clicking the contact and then clicking the **Set as Primary** button on the table toolbar. This causes the system to select the check box in the **Primary** column for the new primary contact and to populate the UI elements in the **Primary Contact** section of the **General** tab with the settings of the new primary contact.

For an existing contact on the [Contacts](#) (CR302000) form, if you clear the value in the **Business Account** box, the system displays a warning about the possibility of changing the primary contact for the account. If you proceed with clearing the **Business Account** box for the contact—thus deleting the link between the contact and the business account—on the **General** and **Contacts** tabs of the [Business Accounts](#) form, the system clears all settings related to the primary contact.

Synchronization of Settings in Leads, Contacts, and Business Accounts

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



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

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

Business Accounts: Workflow for Accounts, Customers, and Vendors

The organizations to which your company intends to sell products and services can be initially defined in Acumatica ERP as business accounts on the [Business Accounts](#) (CR303000) form. These prospective customers may later become customers or even vendors. Over time, business accounts, customers,

and vendors can move between different states, based on actions performed on Acumatica ERP forms. These states are reflected as statuses on the forms.

Extension of a Business Account as a Customer or Vendor

When a prospective customer (which is defined in the system as a business account) purchases products or services from your company, you can easily extend the business account to be a customer in Acumatica ERP, so that you do not need to enter the same data again. It may also happen that a business account becomes a vendor of certain products or services, and you can extend the business account to be a vendor. A business account can be extended as both a customer and a vendor, or just one of these. (Customers and vendors can also be created in the system directly without first being defined as business accounts. If a customer or vendor is created first, the system automatically creates a business account.)

You extend a business account as a customer account or a vendor account by clicking the **Extend as Customer** or **Extend as Vendor** button or menu command on the form toolbar of the [Business Accounts](#) form. The system opens the [Customers](#) (AR303000) form or the [Vendors](#) (AP303000) form, respectively, with the appropriate settings copied from the business account. On the form, you specify the customer or vendor class, the financial settings, and additional settings (such as billing address) that may be used in Acumatica ERP documents of the customer or vendor. You then save the customer or vendor record and close the form to return to the business account record you were viewing; this business account is maintained in the system.

When you save the customer or vendor to which you have extended the business account, the system changes the type of the business account, shown in the **Type** box on the **CRM Info** tab on the [Business Accounts](#) form. The type of the business account can be one of the following: *Business Account* (a prospective customer account that has not been extended as customer or vendor), *Customer*, *Vendor*, or *Customer & Vendor*.

The Workflow for Business Accounts and Customers

In the workflow for business accounts and customers, these entities share the same possible states, which are reflected as statuses on Acumatica ERP forms. The statuses—displayed in the **Customer Status** box of the Summary area of the [Business Accounts](#) (CR303000) and [Customers](#) (AR303000) forms—may be one of the following: *Prospect*, *Active*, *On Hold*, *Credit Hold*, *One-Time*, or *Inactive*.

Transitions between the states of a business account occur as users execute actions by clicking buttons or menu commands on the form toolbar of the [Business Accounts](#) form. When an action is executed, as part of the processing, the system changes the current state of the business account to the particular state that is defined in the workflow; the system changes the status on the form to reflect this.

When the state of a business account is changed, the system changes the state (and, thus, the status) of the associated customer accordingly. Similarly, if a user changes the status of the customer, the system also makes this change to the business account. For example, if a user clicks **Actions > Activate** on the form toolbar of the [Business Accounts](#) form, which causes the system to change the status of the selected business account to *Active*, the system changes the status of the associated customer to *Active* on the [Customers](#) form.



For a business account that has been extended as a vendor, if the status of the vendor has been changed on the [Vendors](#) (AP303000) form, the **Customer Status** box still shows the business account status (and the customer status, if applicable) rather than the vendor status, even though the business account type is *Vendor*.

To mass-change the statuses of multiple business accounts or mass-update their settings, you can use the [Update Business Accounts](#) (CR503320) form.

The Workflow for Vendors

The workflow for vendors is independent from the workflow of business accounts (and the customers associated with business accounts, if applicable). The status of a vendor, which reflects its state, is shown in the **Vendor Status** box of the [Vendors](#) (AP303000) form. It can be one of the following options: *Active*, *On Hold*, *Hold Payments*, *Inactive*, and *One-Time*. Changes to the status of the vendor do not cause changes to the status of the associated business account (and customer, if applicable), and if the status of the business account changes, the system does not change the status of the associated vendor.

For example, suppose that a particular business account has been extended as a vendor and as a customer, and the associated vendor has the *Active* status selected on the [Vendors](#) form. If a user clicks **Actions > Hold** on the [Business Accounts](#) form for the business account associated with the vendor, the system changes the status of both the business account and the associated customer to *On Hold*. However, the status of the vendor remains *Active*.

To mass-change the statuses of multiple business accounts or mass-update their settings, you can use the [Update Business Accounts](#) (CR503320) form.

Business Accounts: To Create a Business Account Manually

The following activity demonstrates how to manually create a business account, review and update the settings of the newly created account, and associate a primary contact with the account.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have received an inquiry submitted via the company's website form by Debbie Euston, the assistant bakery manager at Delicious Crispy, a bakery that bakes pastries, usually with jam filling. Debbie is considering purchasing 100 jars of apple jam. You have created the lead in the system, emailed the company's price list to Debbie, and called her, and Debbie confirmed her interest in purchasing the jam. You have created a contact, and now you need to create a business account in the system.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the following features have been enabled:
 - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
 - *Lead/Contact Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality.
- Validation settings have been specified on the **Duplicate Validation Settings** tab of the [Customer Management Preferences](#) (CR101000) form.

- The *BAKERY* business account class has been defined in the system.
- On the [Contacts](#) (CR302000) form, the *Debbie Euston* and *Patrick Roberts* contacts have been created in the system.
- On the [Employees](#) (EP203000) form, the *Joanne Simpson* employee has been created in the system.

Process Overview

In this activity, you will do the following

1. By using the [Contacts](#) (CR302000) form as a starting point, create a business account manually based on a contact that has been added to the system.
2. By using the [Business Accounts](#) (CR303000) form, do the following:
 - a. Review and update the settings of the newly created business account.
 - b. Select a primary contact for the newly created business account.
 - c. Select an owner for the newly created business account.

System Preparation

Before you start creating a business account, you should do the following:

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

Step 1: Creating a Business Account Based on a Contact

To create a business account for the contact *Debbie Euston*, and specify additional settings for it (its primary contact and its owner in your company who will work with the account) do the following:



You can perform similar instructions to create a business account by using the [Leads](#) (CR301000) form as a starting point.

1. In the **Contact** column on the [Contacts](#) (CR3020PL) form, click the *Debbie Euston* link to open this contact on the [Contacts](#) (CR302000) form.



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

2. On the form toolbar, click **Actions > Create Account**.

3. In the **New Account** dialog box, which opens, do the following:
 - a. On the **Main** tab of the dialog box, specify the settings of the business account as follows:
 1. In the **Business Account ID** box, type *DELICRISP*.
 2. In the **Business Account Class** box, select *BAKERY*.
 - b. Click **Create and Review**. The system creates a business account and opens the newly created account on the [Business Accounts](#) (CR303000) form.
4. On the **Contacts** tab of the form, notice that the row has been added for the *Debbie Euston* contact associated with the business account. Also notice that the **Primary** check box is cleared for the contact.
5. On the **General** tab, in the **Name** box of the **Primary Contact** section, select the *Debbie Euston* contact. Notice that the **Primary Contact** section has become populated with the data from the associated contact.
6. On the **Contacts** tab, you can see that the **Primary** check box has been selected for the *Debbie Euston* contact because the contact was defined as primary for the business account.
7. In the **Owner** box of the Summary area, select *David Chubb*, because this is the user account to which you are signed in and you are the employee in your system who will primarily work with this business account.
8. Click Save and Close. The system returns you to the [Contacts](#) form. In the **Business Account** box of the Summary area, you can see the name of the business account: *DELICRISP—Delicious Crispy*.



In situations where you do not want to specify additional settings for the business account until later, you could click **Create** to close the **New Account** dialog box. In this case, the new business account would be created, the name of the business account would be inserted in the **Business Account** box of the Summary area on the [Contacts](#) form, and the contact would be added to the **Contacts** tab of the [Business Accounts](#) form, but no primary contact would be specified in this business account.

You have created a business account for the *Debbie Euston* contact.

Step 2. Associating a New Contact with a Business Account

Suppose that Patrick Roberts, a new manager at Delicious Crispy has contacted you and asked to send him the SweetLife price list. You have created a new *Patrick Roberts* contact in the system and need to associate this contact with the *DELICRISP* business account.

To associate the *Patrick Roberts* contact with the *DELICRISP* business account, do the following:

1. Open the [Contacts](#) (CR3020PL) form.
2. In the **Display Name** column, click the *Patrick Roberts* link to open this contact record on the [Contacts](#) (CR302000) form.



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

3. In the Summary area of the form, in the **Business Account** box, click the magnifier button.
4. In the lookup table that opens, select *DELICRISP*.
5. On the form toolbar, click **Save**.

You have associated a new contact with the business account. The system has added this contact on the **Contacts** tab of the [Business Accounts](#) (CR303000) form.

Step 3: Changing the Primary Contact for the Business Account

Suppose that Debbie Euston has been promoted to another job in the company, and now you should contact her colleague, Patrick Roberts. You have created the *Patrick Roberts* contact and associated this contact with the *DELICRISP* business account as described in the previous step.

To change the primary contact for the *DELICRISP* business account, do the following:

1. While you are still viewing the *Patrick Roberts* contact on the [Contacts](#) (CR302000) form, in the Summary area, click the Edit button right of the **Business Account** box.
2. On the **General** tab of the [Business Accounts](#) (CR303000) form, which opens in a pop-up window, in the **Name** box of the **Primary Contact** section, click the magnifier button.
3. In the lookup table that opens, select *Patrick Roberts*. Notice that the **Primary Contact** section has become populated with the contact and address settings of the new primary contact. On the **Contacts** tab, you can see that the **Primary** check box has been selected for the *Patrick Roberts* contact because the contact was defined as primary for the business account.
4. On the form toolbar, click **Save**.

You have changed the primary contact for the *DELICRISP* account to *Patrick Roberts*.

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

The following activity demonstrates how to create a business account by using the Acumatica mobile app.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. At the annual conference for food and beverage suppliers, you became acquainted with Bruce Ward, a procurement manager at Store National, a chain of supermarkets in the United States. Bruce

has decided to choose SweetLife as a new supplier of fresh fruit. You have created the contact in the system, and now you need to quickly create a new business account for further processing of developments with the business in the system (which involves creating an opportunity).



You can find detailed instructions on creating a contact through the Acumatica mobile app in [Contacts: To Create a Contact by Using the Acumatica Mobile App](#) and detailed instructions on creating opportunities in [Opportunities: To Create an Opportunity by Using the Acumatica Mobile App](#).

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- The Acumatica mobile app has been downloaded and installed on the mobile device that will be used for creating a business account in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.
- The Acumatica ERP instance has been hosted over HTTPS. For more information, see [Setting Up an HTTPS Service in Web Server \(IIS\)](#).
- The *Bruce Ward* contact has been created in the system on the [Contacts](#) (CR302000) form.

System Preparation

Before you start creating a new business account in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating a business account in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.



The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see [Setting Up an HTTPS Service in Web Server \(IIS\)](#).

Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create a business account by using the Acumatica mobile app.

Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.

2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).
3. Optional: In the **Account Name** box, specify the name of the user account.
4. Tap **Next**.
5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

Step 2: Creating a Business Account by Using the Acumatica Mobile App

To quickly create a business account by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.
2. On the main menu of the app, tap the **Business Accounts** tile.
3. On the Business Accounts screen, tap the Add Record button.

The **Summary** tab opens.

4. Do the following:
 - In the **Business Account** box, type *STORENAT*.
 - In the **Account Name** box, type *Store National*.
 - In the **Account Email** box, type *b.ward@storenational.example.com*.
5. Swipe upward and tap **Account Address**. This expands the group of related elements.
6. Specify the address information as follows:
 - In the **City** box, type *New York*
 - In the **Country** box, select *United States of America*.
7. Open the **Other** tab.
8. Tap **CRM** to expand the group of related elements.
9. In the **Class ID** box, select *Supermarkets, stores, groceries*.
10. Tap the Save button to save the business account.

Lesson 1.3: Creating Contacts

Contacts: General Information

You can create contacts in Acumatica ERP to represent the people associated with leads and business accounts (and later customers, if a sale occurs, or even vendors). This topic provides information about creating contacts in Acumatica ERP.



Contacts can be associated with a variety of entities in the system. In this chapter, we focus on contacts as they relate to customer relationship management (CRM) functionality. That is, the chapter primarily discusses the contacts associated with prospective customers before they have purchased your company's products or services.

Learning Objectives

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

- Become familiar with ways of creating contacts
- Learn about the synchronization of settings in leads, contacts, and business accounts
- Learn about address validation and enrichment through third-party providers
- Create a contact manually
- Create a contact by using the Acumatica ERP mobile app
- Create a contact by using the Acumatica add-in for Outlook

Applicable Scenarios

You may want to learn how to create contacts in scenarios that include the following:

- An employee of your company has contacted a lead and confirmed the contact information and the interest in company's products or services, and you need to convert the lead to an opportunity.
- You have been assigned to a lead whose contact information and interest in the company's products or services has been confirmed.

Contacts in Acumatica ERP

In Acumatica ERP, a contact is a record on the [Contacts](#) (CR302000) form that represents an individual and that can be associated with a variety of entities in the system. When you create a contact record, you enter the settings related to the information you have obtained, such as the individual's name, address, email address, and phone number.

If you have created a lead in the system before you create the related contact, you specify the lead's basic contact information on the **Contact Info** tab of the [Leads](#) (CR301000) form. When you create a contact for this lead, the system copies the contact information of the lead to the associated contact.

Any contact can be associated with one lead or multiple leads and with only one business account. You can synchronize contact information in the associated lead, contact, and business account to keep your data consistent and reliable. You can also easily navigate between the associated contacts, leads, and business accounts. For more information on business accounts, see [Creating Business Accounts](#).

Contact Creation in Acumatica ERP

In Acumatica ERP, you can create contacts in multiple ways depending on your company's business processes and maintain them on the [Contacts](#) (CR302000) form. If you use customer relationship management (CRM) functionality and you are processing a lead for which the contact information and interest in buying the company's products or services have been confirmed, you can convert the lead to an opportunity, which may involve the creation of a business account and a contact for this lead. You can validate an individual lead for duplicates before you create a contact. For details, see [Validating Records for Duplicates](#). You can also create a contact manually if needed.

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

- On the [Leads](#) (CR301000) form when you convert the lead selected on the form to an opportunity: You click **Actions > Convert to Opportunity** on the form toolbar. In the **New Opportunity** dialog box, which opens, you specify the opportunity and business account settings. (The system automatically inserts the basic settings for the contact based on the settings of the lead, but you can override any of them.) You then click **Create** or **Create and Review** to create the opportunity and contact. For detailed instructions, see [Qualifying Leads \(Sales\): To Convert a Lead to an Opportunity](#).
- On the [Leads](#), [Business Accounts](#) (CR303000), [Opportunities](#) (CR304000), [Vendors](#) (AP303000), or [Customers](#) (AR303000) forms if you create a contact associated with the entity selected on the form: You click **Actions > Create Contact** on the form toolbar. In the **New Contact** dialog box, which opens, you specify the basic contact settings (additional settings can be specified on the [Contacts](#) form), and then you click **Create** or **Create and Review** to create the contact.
- On the [Leads](#) or [Opportunities](#) form if you specify the settings of the primary contact when you create a business account for the selected lead or opportunity: You do this by clicking **Actions > Create Account** on the form toolbar. In the **New Account** dialog box, which opens, you specify the basic business account and contact settings, and click **Create** or **Create and Review** to create the business account and contact.
- Directly on the [Contacts](#) (CR302000) form: In this case, you add a new record and manually enter the settings of the new contact.
- By creating a contact from the Acumatica add-in for Outlook, based on the details of the selected email recipient or sender: For detailed instructions, see [Contacts: To Create a Contact by Using the Acumatica Add-In for Outlook](#).
- Directly by using the Acumatica ERP mobile app: For detailed instructions, see [Contacts: To Create a Contact by Using the Acumatica Mobile App](#).
- Directly by scanning a contact's business card into the Acumatica ERP mobile app: For detailed instructions, see [Contacts: To Create a Contact Through Business Card Recognition](#).

The system assigns the *Active* status to a new contact; this status, displayed in the **Status** box of the Summary area on the form, indicates that the contact is available in lookup tables for the **Contact** element on forms. If the contact is not reachable (for example, the person represented by the contact has resigned from the company you are working with), you can click **Actions > Deactivate**, and the system assigns the *Inactive* state to this contact.

Regardless of how you create the contact, you can select a contact class on the [Contacts](#) form or in one of the dialog boxes mentioned above, which causes the system to insert default settings for the contact, easing the process of content creation. (For details, see [Defining Contact Classes](#).)

The [Contacts](#) form contains the complete settings of the contact, which you can view and edit. On the **Activities** tab of this form, you can create and work with all the activities related to the contact, including planned, current, and completed activities. For details, see [Managing Emails and Activities](#).

Synchronization of Settings in Leads, Contacts, and Business Accounts

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



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

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

Contact Relations with Acumatica ERP Entities

Once a contact has been defined in the system on the [Contacts](#) (CR302000) form, it can be associated with any of the following entities in Acumatica ERP:

- **Leads:** A lead or multiple leads can be associated with a contact. On the **Leads** tab of the [Contacts](#) form, you can see the list of leads associated with the contact.
- **Business accounts:** In the **Business Account** box in the Summary area of the [Contacts](#) form, an associated business account may be specified for a contact. Multiple contacts can be associated with one business account, but only one primary contact can be selected for an account. For details, see [Creating Business Accounts](#).
- **Marketing lists:** A contact may be added to a marketing list and subscribed to newsletters and other mailings. On the **Marketing Lists** tab of the [Contacts](#) form, you can see all marketing lists in which the contact is included. For more information about marketing lists, see [Managing Marketing Lists](#).
- **Marketing campaigns:** On the **Campaigns** tab of the [Contacts](#) form, you can view a list of all completed, ongoing, and planned marketing campaigns in which the contact is involved. For details about campaigns in Acumatica ERP, see [Managing Marketing Campaigns](#).
- **Opportunities:** The **Opportunities** tab of the [Contacts](#) form lists all opportunities linked to the contact.
- **Cases:** The **Cases** tab of the [Contacts](#) form contains a list of all cases associated with the contact.
- **Users:** A contact may be associated with an external user that may have access to the system. You can use the **User Info** tab of the [Contacts](#) form to view and edit information about the user account associated with the contact.
- **Employees:** When the employee record is created and saved in the system, the system creates a contact for this employee and associates this employee record with this contact record. You can see the link to the associated contact on the [Employees](#) (EP203000) form, in the **Contact Info** section on the **General Info** tab.

Contacts: To Create a Contact Manually

The following activity demonstrates how to manually create a contact and review and update the settings of the newly created contact.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have received a call from Thomas Jones, the bakery manager at Pro Muffin, a bakery that cooks pastries, usually with jam filling. Thomas is considering purchasing 100 jars of cherry jam. You have created the lead in the system, converted the lead to an opportunity, and started negotiating the deal. Thomas asks you to discuss the financial details of the deal with his colleague Tina Parker, a finance manager, and gives you her contact details. You need to create a contact in the system and associate the contact with the opportunity created for Pro Muffin.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the following features have been enabled:
 - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
 - *Lead/Contact Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality.
- Validation settings have been specified on the **Duplicate Validation Settings** tab of the [Customer Management Preferences](#) (CR101000) form.
- The *BAKERY* contact class has been created on the [Contact Classes](#) (CR205000) form.
- A lead record for the *Thomas Jones* lead has been created on the [Leads](#) (CR301000) form and converted to an opportunity as follows:
 - a. The *Purchase of 100 jars of cherry jam by Pro Muffin* has been created on the [Opportunities](#) (CR304000) form.
 - b. The *PROMUFFIN* business account has been created on the [Business Accounts](#) (CR303000) form.
 - c. The *Thomas Jones* contact has been created on the [Contacts](#) (CR302000) form.

Process Overview

In this activity, you will do the following:

1. Manually create a contact by using the [Contacts](#) (CR302000) form.

2. Associate the newly created contact with an existing opportunity on the [Opportunities](#) (CR304000) form.

System Preparation

Before you start creating a contact manually, you should do the following:

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

Step 1: Creating a Contact Manually

To create a contact for Tina Parker, a finance manager at Pro Muffin, do the following:

1. Open the Contacts (CR3020PL) form.
2. On the form toolbar, click **New Record**.
3. On the **Details** tab of the [Contacts](#) (CR302000) form, which opens, do the following:
 - a. In the **Contact** section, specify the contact settings as follows:
 1. In the **First Name** box, type *Tina*.
 2. In the **Last Name** box, type *Parker*.
 3. In the **Company Name** box, type *Pro Muffin*.
 4. In the **Job Title** box, type *Finance Manager*.
 5. In the **Email** box, type *tina@promuffin.example.com*.
 - b. In the **Address** section, specify the address settings as follows:
 1. In the **Address Line 1** box, type *4897 Mapleview Drive*.
 2. In the **City** box, type *Philadelphia*.
 3. In the **State** box, select *PA*.
 4. In the **Postal Code** box, type *63463*.
 5. In the **Country** box, select *US*.
4. On the **CRM Info** tab, in the **Contact Class** box, select *BAKERY*.
5. On the form toolbar, click **Save**.

You have created the *Tina Parker* contact in the system.

Step 2. Associating the Contact with an Existing Opportunity

To associate the *Tina Parker* contact you have created with the opportunity that has been created for Pro Muffin, do the following:

1. In the **Opportunity ID** column of the Opportunities (CR3040PL) form, click the link for the opportunity *Purchase of 100 jars of cherry jam by Pro Muffin* in the **Subject** box. The opportunity opens on the [Opportunities](#) (CR304000) form.
2. Open the **Relations** tab.
3. Click **Add Row** on the table toolbar, and specify the following settings in the row:
 - a. **Role:** *Related Entity*
 - b. **Type:** *Contact*
 - c. **Contact:** *Tina Parker*
4. On the form toolbar, click **Save**.

You have associated the *Tina Parker* contact with the opportunity created for Pro Muffin.

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

The following activity demonstrates how to create a contact by using the Acumatica mobile app.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. At the annual conference for food and beverage suppliers, you met with Eva Johnson, a new director of the supply chain at Storehut, a chain of supermarkets in New York. Storehut is a current SweetLife customer. You need to create a new contact in the system for your existing *STOREHUT* customer.



You can find detailed instructions on creating a business account through the Acumatica mobile app in [Business Accounts: To Create a Business Account by Using the Acumatica Mobile App](#) and detailed instructions on creating an opportunity in [Opportunities: To Create an Opportunity by Using the Acumatica Mobile App](#).

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.

- On the [Business Accounts](#) (CR303000) form, the *STOREHUT* business account has been created and extended as a customer.

System Preparation

Before you start creating a new contact in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating a contact in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.



The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see [Setting Up an HTTPS Service in Web Server \(IIS\)](#).

Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create a contact by using the Acumatica mobile app.

Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.
2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).
3. Optional: In the **Account Name** box, specify the name of the user account.
4. Tap **Next**.
5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

Step 2: Creating a Contact by Using the Acumatica Mobile App

To create a contact on the fly by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.
2. On the main menu of the app, tap the **Contacts** tile.
3. On the Contacts screen, tap the Add Record button.

The **Summary** tab opens.

4. Specify the following settings:

- **First Name:** *Eva*

- **Last Name:** Johnson
 - **Job Title:** Director of Supply Chain
5. In the **Business Account** box, select *STOREHUT*.
 6. Swipe upward and tap **Details**. This expands the group of related elements.
 7. In the **City** box, specify *New York*.
 8. Make sure that in the **Country** box, *United States of America* is specified.
 9. Tap the **Other** tab of the app form.
 10. Tap **CRM Info** to expand the group of related elements.
 11. In the **Contact Class** box, select *Supermarkets, stores, groceries*.
 12. Tap the Save button to save the contact.

Lesson 1.4: Managing Emails and Activities

In this lesson, you will learn how to create an email, an activity of the *Phone Call* type, and a task. For more information about events, see [Lesson 2.3: Managing Events](#).

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 unpinned an activity from the list, an icon is no longer shown in the **Is Pinned** column, and the activity is moved to the appropriate location based on the sorting settings.

Tracking of Communication with Leads in Acumatica ERP

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


For details, see [Emails and Activities: Emails](#) and [Emails and Activities: Activities](#).



The Activities Tab

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

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











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

-  is used for the *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: Tasks

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

Creation and Tracking of Tasks for an Entity

You can create a task associated with any of these entities by clicking the **Add Task** button on the table toolbar of **Activities** tab of any of the following forms:

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

When you click the button, the [Task](#) (CR306020) form opens in a pop-up window, where you can specify the needed details. By default, the system inserts your employee ID in the **Owner** box of the **Details** tab, but you can reassign the task to another employee. When you save the task, the system returns you to the form you added the activity from and adds a row with the *Task* type to the **Activities** tab of the form.

When you create a task, on the **Details** tab of the [Task](#) form, you can set up a reminder for it (by selecting the **Reminder** check box) and specify on which day before the due date the task owner should receive the reminder (in the **Remind At** box). On the specified date, the reminder will appear

on the task owner's Acumatica ERP screen so that the creator or the owner can complete the task or change its status.

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

Copying of Lead-Related Tasks to Related Entities

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



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

Task Management

On the [Tasks](#) (WZ202000) form, you can manage the tasks of the selected business process scenario. The scenario is represented in a tree format and consists of the tasks to be executed to complete a complicated process in Acumatica ERP. For details, see [Managing Scenarios](#).

By using the [Event and Task Categories](#) (EP204040) form, you can create a list of task categories and provide a color code for each category. If you do, when you open the list of your tasks on the [Tasks](#) (EP404000) form, you will see the tasks highlighted with colors corresponding to the categories.

Emails and Activities: Time Reporting

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

Time Reporting

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

Emails and Activities: To Create an Email

The following activity will demonstrate how to create an email.



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

Story

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

Configuration Overview

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

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

Process Overview

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

System Preparation

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

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

Step: Creating an Email

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

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



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

2. On the [Leads](#) (CR301000) form, which opens, open the **Activities** tab.
3. On the table toolbar, click **Add Email**. The [Email Activity](#) (CR306015) form opens in a pop-up window. Notice that the lead's name is specified in the **To** box.
4. In the **From** box, select the *marketing@sweetlife.com*.

5. In the **Subject** box, specify: `New Fruits in Season!`.
6. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

Dear Donna,

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

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

Our offer is available until the end of the month.

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

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



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

Emails and Activities: To Track a Phone Call

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



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

Story

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

Configuration Overview

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

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

Process Overview

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

System Preparation

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

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

Step: Creating an Activity

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

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



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

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

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

Emails and Activities: To Create a Task

The following activity will demonstrate how to create a task.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Donna Coleman, a purchasing manager at Yummy Supplies supermarket, is searching for a new supplier of fresh fruit and would like to meet you in order to discuss the company's products and services. You need to create a task for preparing for the meeting with Donna.

Configuration Overview

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

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

Process Overview

In this activity, you will create a task on the **Activities** tab of the [Leads](#) (CR301000) form.

System Preparation

Before you start creating a task, you should do the following:

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

Step: Creating a Task

To create a task related to the *Donna Coleman* lead, do the following:

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



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

2. On the [Leads](#) (CR301000) form, which opens, open the **Activities** tab.
3. On the table toolbar, click **Add Task**. The [Task](#) (CR306020) form opens in a pop-up window. In the **Related Entity** box, the *Donna Coleman* lead is specified.
4. On the **Details** tab, specify the following settings:
 - **Summary:** *Preparing for the meeting with D. Coleman*
 - **Start Date:** The current date
 - **Due Date:** The current date
 - **Completion (%):** The percent of the task completion (for example, you can specify 5 %)
 - **Reminder:** Selected if you want a reminder about the task to be sent to you (as David Chubb, the owner of this task)
 - **Remind at:** The current date and any time in the near future, such as five minutes from now
 - **Priority:** *Normal*
 - **Status:** *Processing*
 - **Category:** The category of the task, if applicable
5. Optional: In the text editor area, type your comments or any other information related to the task.
6. On the form toolbar, click Save and Close.

You have created a task; notice that a row with the *Task* type is added to the table on the **Activities** tab of the [Leads](#) form for the lead.

Lesson 2: Managing Opportunities

Lesson 2.1: Creating Opportunities

Opportunities: General Information

You define a sales opportunity in the system to track potential deals as they progress through your sales pipeline toward closing. This topic provides information about creating opportunities in Acumatica ERP.

Learning Objectives

In this chapter, you will do the following:

- Become familiar with ways of creating opportunities
- Learn about the synchronization of settings in opportunities, contacts, and business accounts
- Develop a general understanding of the settings of opportunities
- Learn about address validation and enrichment through third-party providers
- Create an opportunity through lead conversion
- Create an opportunity manually
- Create an opportunity by using the Acumatica mobile app

Applicable Scenarios

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

- A lead has contacted you and confirmed the intention to buy the company's products or services.
- An existing customer has confirmed the intention to again buy the company's products or services.

Creation of Opportunities in Acumatica ERP

In Acumatica ERP, an opportunity represents a potential, ongoing, or closed deal with a new or existing customer. An opportunity record, which is created on the [Opportunities](#) (CR304000) form, has a variety of settings, such as the prospect or customer's contact information, the financial and shipping information, the emails and activities related to an opportunity, and the associated quotes, sales orders, and invoices. With these settings and the related documents, you can easily keep track of and update the most important information about the deal, as described in [Settings of an Opportunity](#). Each opportunity must belong to an opportunity class, which gives you the ability to use the opportunity workflow and stages, as described in [Managing Opportunities: Opportunity Stages](#).

An opportunity can be created in any of the following ways:

- On the [Leads](#) (CR301000) form if you click **Actions > Convert to Opportunity** for a selected lead: When the lead confirms the interest to buy, you can convert it to an opportunity and create

an opportunity record in the system, as described in [Qualifying Leads \(Sales\)](#). As a rule, during lead conversion, you create a contact and a business account (if they have not yet been created in the system), which the system associates with the sales-qualified lead (SQL). Creation of a business account may be required or optional depending on the setting on the [Lead Classes](#) (CR207000) form: If the **Require Account for Conversion to Opportunity** check box (**Conversion Settings** section of the **Details** tab) is selected, a business account must be created before the lead is converted to an opportunity.

The activities associated with the lead and listed on the **Activities** tab of the [Leads](#) form become associated with the newly created opportunity, and you can track the history of communication with the lead, from creation in the system to conversion to an opportunity.

- By manually entering opportunity data on the [Opportunities](#) form: For an existing customer, you can create an opportunity and associate the opportunity with a contact and business account that have already been created in the system. For a new customer, you can specify contact information on the **Contact Info** tab of the same form; you can then create an associated contact or both a business account and a contact by clicking **Actions > Create Contact** or **Actions > Create Account**, respectively.
- By using the Acumatica mobile app: For an existing customer, you can create an opportunity and associate the opportunity with a contact and business account that have already been created in the system.
- By using an import scenario to import a list of opportunities on the [Import by Scenario](#) (SM206036) form: You can use an import scenario if you want to import opportunities from a legacy CRM system.
- On the **Opportunities** tab of the [Contacts](#) (CR302000) form if you click **Add New Opportunity** on the table toolbar: You may want to create an opportunity on this tab if you are viewing this form and need to create an opportunity on the fly or if your company does not use business accounts.
- On the **Opportunities** tab of the [Business Accounts](#) (CR303000) form for the business accounts of the *Business Account* and *Customer* types if you click **Add New Opportunity** on the table toolbar.
- On the **Opportunities** tab of the [Marketing Campaigns](#) (CR202000) form if you click **Add New Opportunity** on the table toolbar.
- By using the Acumatica add-in for Outlook based on the details of the selected email recipient or sender.

Processing of an Opportunity Through States

As an opportunity is being processed by a sales team, it progresses through various states. Each opportunity state is represented by the status displayed in the **Status** box in the Summary area of the [Opportunities](#) (CR304000) form.

In Acumatica ERP, an opportunity may be assigned one of the following statuses:

- *New*: The opportunity has been created, but no work has been done on it yet.
- *Open*: The opportunity is being worked on by a sales team.
- *Won*: The deal has been successfully closed.
- *Lost*: The deal has been canceled.

You can use the following actions on the **Actions** menu on the form toolbar of the [Opportunities](#) form to move an opportunity through states:

- **Open:** Opens the **Details** dialog box, where you select the reason and the stage for opening the opportunity and then you confirm the action. The status of the opportunity will be changed to *Open*. This action is available when the status of the opportunity record is *New*.
- **Close as Won:** Opens the **Details** dialog box, where you select the reason and the stage for winning the opportunity and then you confirm the action. The status of the opportunity will be changed to *Won*. This action is available when the status of the opportunity record is *New* or *Open*.
- **Close as Lost:** Opens the **Details** dialog box, where you select the reason and the stage for closing the opportunity as lost and then you confirm the action. The status of the opportunity will be changed to *Lost*. This action is available when the status of the opportunity record is *New* or *Open*.

As you move the opportunity through states, you can select between various stages. For details, see [Managing Opportunities: Opportunity Stages](#).

A system administrator can configure notifications related to opportunity states. For more information, see [Business Events: a Data Entry Form as a Source](#).

Settings of an Opportunity

When the opportunity has been created, you can use and modify (if applicable) the settings on the [Opportunities](#) (CR304000) form. You can do the following:

- On the **Activities** tab, add and work with emails, tasks, and activities associated with an opportunity. For details, see [Managing Emails and Activities](#).
- On the **Document Details** tab, specify the details of the products or services (such as the specific inventory items, quantities, and prices) that are to be sold to a customer. For details, see [Managing Opportunities: Products and Services in an Opportunity](#).
- On the **Details** tab, view or modify the CRM-related settings, such as the workgroup, the source settings, and additional settings, such as branch or tax zone, that can be associated with the business account specified for the opportunity or with the selling branch.
- On the **Quotes** tab, view and add any sales quotes and project quotes associated with the opportunity. For details, see [Managing Opportunities: Sales Quotes](#).
- On the **Contact Info** tab, view and modify the customer's contact information. For details, see [Synchronization of Contact and Address Settings in Opportunities, Contacts, and Business Accounts](#), [Address Validation Through a Third-Party Provider](#), and [Address Enrichment Through a Third-Party Provider](#).
- On the **Shipping Info** tab, view and modify the customer's shipping information. For details, see [Shipping Settings in Opportunities](#).
- On the **Attributes** tab, view the list of attributes, which may be used to help your company manage specific information useful for its business, such as the industry or number of employees. For details, see [Attributes](#) and [User-Defined Fields](#).
- On the **Relations** tab, find the information about the lead that has been converted to this opportunity (if applicable), and view and add any related entities, such as the contacts or business accounts associated with an opportunity.

- On the **Tax Details** tab, view the information the system has added about taxes related to the products or services that are to be sold to the customer. For details, see [Taxes](#). The settings on this tab depend on location settings. For details, see [Customers: Customer Locations](#).
- On the **Discount Details** tab, review the system-added information about discounts related to the products or services that are to be sold to the customer. This tab is available only if the *Customer Discounts* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.
- On the **Orders** tab, view information about sales orders associated with the opportunity. For details, see [Managing Opportunities: Sales Orders](#).
- On the **Invoices** tab, see the list of invoices associated with the opportunity. For details, see [Managing Opportunities: Invoices](#).

Synchronization of Contact and Address Settings in Opportunities, Contacts, and Business Accounts

In Acumatica ERP, contact and address settings in opportunities, contacts, and business accounts are synchronized by default. The contact information from the business account or contact specified in the Summary area of the [Opportunities](#) (CR304000) form is displayed as read-only by default, but it can be modified if you select the **Override** check box on the **Contact Info** tab.



With the **Override** check box selected on the **Contact Info** tab of the [Opportunities](#) form, if you modify the contact or address settings of a contact or business account associated with an opportunity on the [Contacts](#) (CR302000) or [Business Accounts](#) (CR303000) form, the settings displayed on the **Contact Info** tab of the [Opportunities](#) form will not be changed.

Also, if you select a different business account for an opportunity, you can replace the existing contact settings specified on the **Contact Info** tab of the [Opportunities](#) form with the new settings of the contact associated with the newly selected business account. The system displays the warning message left of the **Contact** box in the Summary area: *The contact does not belong to the selected business account.* You can select a new contact from the list of the contacts associated with the selected business account.

The synchronization or overriding of settings applies to all the settings on the **Contact Info** tab of the [Opportunities](#) form.

Address Validation Through a Third-Party Provider

If the *Address Validation Integration* feature is enabled on the [Enable/Disable Features](#) (CS100000) form (in the *Third Party Integrations* group of features) and an address validation provider is configured on the [Address Providers](#) (CS103000) form, you can click **Actions > Validate Addresses** on the form toolbar of the [Opportunities](#) form to validate the addresses specified for the opportunity through integration with a third-party software or service.

Alternatively, you can run validation for multiple accounts at once, by using the [Validate Addresses](#) (CR509020) form.

For details on configuring the integration, see [Integrating Acumatica ERP with Address Validation Providers](#).

If the specified addresses have been validated, the system selects the **Validated** check boxes on the **Contact Info** tab (**Address** section) and the **Shipping Info** tab (**Ship-To Address** section). These check boxes appear on the form only if the *Address Validation Integration* feature is enabled on the [Enable/Disable Features](#) form.

Address Enrichment Through a Third-Party Provider

With the address enrichment functionality, you can add a new address, update an existing address, and fill in the missing address information in a record, such as a lead, contact, business account, or opportunity. This functionality is available if the *Address Lookup Integration* feature is enabled on the [Enable/Disable Features](#) (CS100000) form (in the *Customer Management* group of features) and an address provider is configured on the [Address Providers](#) (CS103000) form. As a result, you can use the address provider to specify addresses on all forms that have address settings (if applicable).

You can add address settings based on the company name, for example, of a lead. On the [Leads](#) (CR301000) form (in the **Address** section of the **Contact Info** tab), the **Address Lookup** button has been added. The button is displayed instead of the **View on Map** button if the *Address Lookup Integration* feature is enabled on the [Enable/Disable Features](#) (CS100000) form. When you click the **Address Lookup** button, the **Address Lookup** dialog box opens, in which you can find the company location details. For details, see [Integration with Web Map Services](#).

Shipping Settings in Opportunities

When you create an opportunity on the [Opportunities](#) (CR304000) form, the system searches for the following shipping settings until it finds the data and populates the **Shipping Info** tab with the first data it finds:

1. The primary location specified for the business account associated with the opportunity: The business account is specified in the **Business Account** box and the location is specified in the **Location** box of the Summary area.
2. The main contact information and address of the business account associated with the opportunity: The business account is specified in the **Business Account** box of the Summary area.
3. The contact information and address of the contact associated with the opportunity: The contact is specified in the **Contact** box of the Summary area.
4. The contact information specified on the **Contact Info** tab of the form.

The shipping settings specified on the **Shipping Info** tab are displayed as read-only by default. If you select the **Override Shipping Info** check box on this tab, you can modify the shipping settings. Each time you modify these settings, the applicable taxes are automatically recalculated for the opportunity on the **Tax Details** tab if sales taxes have been configured in the system. For details, see [Taxes](#).

If the **Override Shipping Info** check box is selected and you change the business account specified in the Summary area of the [Opportunities](#) form, the system brings up a dialog box that asks whether you want the specified shipping settings to be replaced with the settings of the new business account. You can choose to keep the previously specified settings; in this case, the **Override Shipping Info** check box remains selected on the **Shipping Info** tab to indicate that these settings differ from those of the contact, business account, or location selected in the Summary area.



With the **Override Shipping Info** check box selected, if you use the [Contacts](#) (CR302000), [Business Accounts](#) (CR303000), or [Account Locations](#) (CR303010) form to modify the contact or address settings for the contact, business account, or location specified for an opportunity, the system does not change the settings on the **Shipping Info** tab on the [Opportunities](#) form.

Shipping Settings in Quotes, Sales Orders, and Invoices

The shipping settings specified for an opportunity on the [Opportunities](#) (CR304000) form are transferred to a sales order, invoice, or quote that you create based on that opportunity.

If a primary quote exists for an opportunity, the shipping settings specified for the primary sales quote are synchronized with the shipping settings specified for the opportunity.

On the [Opportunities](#) form, if you modify the shipping settings specified for an opportunity that is already associated with a sales order, invoice, or non-primary sales quote, the changes you have made to the opportunity will not be reflected on the settings in the associated document. Similarly, changes in the shipping settings specified for a sales order, invoice, or non-primary sales quote are not reflected on the settings in the associated opportunity.

Opportunities: To Create an Opportunity Manually

The following activity will help you create an opportunity manually in Acumatica ERP.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have received a phone call from your customer Kevin Grey, who is a buyer at Groceriex, a chain of supermarkets in New York. Kevin would like to extend Groceriex's contract with SweetLife and purchase 50 pounds of each of the following fresh fruits: bananas, pears, oranges, and lemons.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the following features have been enabled:
 - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
 - *Address Lookup Integration* (optional): Is used if you will be adding address or shipment information through a third-party provider (Google Maps or Bing Maps).
- The *GROCERIEIX* business account has been created in the system on the [Business Accounts](#) (CR303000) form and extended as a customer.
- The *Kevin Grey* contact has been created in the system on the [Contacts](#) (CR302000) form and associated with the *GROCERIEIX* business account.
- The *PRODUCT* opportunity class has been created on the [Opportunity Classes](#) (CR209000) form.
- The *BANANAS*, *PEARS*, *ORANGES*, and *LEMONS* stock items (which hold the settings of one pound of each of these fruits) have been created on the [Stock Items](#) (IN202500) form.

Process Overview

In this activity, you will create an opportunity for the existing customer on the [Opportunities](#) (CR304000) form.

System Preparation

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

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

Step: Creating an Opportunity Manually

To manually create an opportunity with Kevin Grey of *GROCERIEX*, do the following:

1. Open the Business Accounts (CR3030PL) form.
2. In the **Business Account** column, click the *GROCERIEX* link to open the business account record on the [Business Accounts](#) (CR303000) form.



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

3. Open the **Opportunities** tab.
4. On the table toolbar, click **Add New Opportunity**.
5. In the Summary area of the [Opportunities](#) (CR304000) form, which opens in a pop-up window with *GROCERIEX* selected as a business account, do the following:
 - a. In the **Class ID** box, select *PRODUCT*.
 - b. In the **Stage** box, select *Development*.
 - c. In the **Estimation** box, select the estimated date of the deal closure, for example, tomorrow's date.
 - d. In the **Subject** box, add *Purchase of fresh fruit*.
6. On the form toolbar, click **Save**.
7. On the form toolbar, click **Open** to indicate in the system that you have started working on the opportunity.
8. In the **Details** dialog box, which opens, click **OK**.
9. On the **Activities** tab, specify the results of your phone discussion with Kevin Grey about the order of fruit:
 - a. On the table toolbar, click **Add Activity > Add Phone Call**.
 - b. In the [Activity](#) (CR306010) form, which opens in a pop-up window, do the following:

1. In the **Summary** box, specify a brief summary of the phone call with Kevin Grey by typing *Purchase of bananas, pears, oranges, and lemons.*
 2. In the text editor area, specify *The shipment should be scheduled for tomorrow morning.*
 3. On the form toolbar, click **Save and Close** to return to the *Opportunities* form with the opportunity open.
 4. On the **Activities** tab, notice that a row with the *Phone Call* type is added to the table.
10. On the **Document Details** tab, add the details of the items to be sold as follows:
- a. On the table toolbar, click **Add Row**.
 - b. In the **Inventory ID** column of the added row, select *BANANAS*.
 - c. In the **Quantity** column, specify *50*.
 - d. Repeat the three previous subinstructions to add to the table rows for the *PEARS*, *ORANGES*, and *LEMONS* items, in the quantity of 50 pounds each.
11. On the form toolbar, click **Save**.

You have created an opportunity for the existing *GROCERIEX* customer.

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

The following activity will help you create an opportunity by using the Acumatica mobile app.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You are currently on a business trip and cannot use your laptop at the moment. Fred Robinson, a store manager at the Store Cart supermarket, has called you and asked you to place an urgent order for assorted teas (black, fruit, and green), 50 packs of each. You need to create an opportunity in Acumatica ERP on the fly.

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
 - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.

- *Address Lookup Integration* (optional): Is used if you will be adding address information through a third-party provider (Google Maps or Bing Maps).
- The *STORECART* business account has been created in the system on the [Business Accounts](#) (CR303000) form and extended as a customer.
- The *Fred Robinson* contact has been created in the system on the [Contacts](#) (CR302000) form and associated with the *STORECART* business account.

System Preparation

Before you start creating a new opportunity in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating an opportunity in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.



The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see [Setting Up an HTTPS Service in Web Server \(IIS\)](#).

Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create an opportunity for an existing customer by using the Acumatica mobile app.

Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.
2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).
3. Optional: In the **Account Name** box, specify the name of the user account.
4. Tap **Next**.
5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

Step 2: Creating an Opportunity by Using the Acumatica Mobile App

To create an opportunity with the contact *Fred Robinson* of the *STORECART* customer by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.
2. Tap the **Opportunities** tile.

3. On the Opportunities screen, tap the Add Record button.

The **Summary** tab opens.

4. Specify the settings as follows:

- **Class ID:** Select *Product Sales*.
- **Subject:** Type *Sale of assorted teas, black, fruit, and green*.
- **Stage:** Select *Development*.
- **Business Account:** Select *STORECART*.

5. Tap the Save button to save the opportunity.

6. Tap the More button to open the Actions menu.

7. On the Actions menu, tap **Open**. This expands the **Details** group of elements.

8. In the **Details** group of elements, do the following:

- a. In the **Reason** box, select *In Progress*.
- b. In the **Stage** box, select *Negotiation*.
- c. Click **OK**.

9. On the **Details** tab, do the following:

- a. Tap the Add Record button.
- b. In the **Inventory ID** box, select *BLACKTEA06*.
- c. In the **Quantity** box, type 50.
- d. Repeat the three previous subinstructions to add the *FRUITTEA12* and *GREENTEA06* items to the opportunity.
- e. Tap the Back button to open the list of items on the **Details** tab.
- f. Tap the Save button to save your changes to the opportunity.

Lesson 2.2: Assigning Opportunities to Owners and Workgroups

Assigning Opportunities to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the customer management workload within the company. You can use assignment maps to indicate to the system how to assign records—such as leads, opportunities, or cases—to individuals or groups of people (that is, to owners or

workgroups). This topic provides information about assigning opportunities to owners and workgroups one by one or through mass processing.

Learning Objectives

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

- For an opportunity class, specify how the system determines the default owner it assigns to new opportunities of the class
- Assign an opportunity manually to a particular owner
- Assign a selected group of opportunities to owners or workgroups by using an opportunity assignment map

Applicable Scenarios

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

- You need to have the system automatically assign opportunities to salespersons when leads are converted to opportunities.
- You need to manually assign or reassign an opportunity to another owner or workgroup.
- You do not work with leads in your system and need to assign opportunities to the appropriate owners, workgroups, or both without lead conversion.

Assignment of Opportunities to Owners and Workgroups in Acumatica ERP

In Acumatica ERP, you can easily base the rules for opportunity assignment on company policies because opportunities can be assigned to owners or workgroups in many different ways, based on the settings and attributes of the opportunity records being assigned. You can assign opportunities manually or automatically, through conversion of a lead to an opportunity.

You can automatically assign an opportunity to an owner by converting a lead to an opportunity if a default owner has been selected in the associated opportunity class.

You can cause the system to automatically assign opportunities to owners by specifying a setting for each opportunity class that determines how the default owner is assigned to new opportunities of the class. On the **Details** tab of the [Opportunity Classes](#) (CR209000) form for the opportunity class, you select one of the following options in the **Default Owner** box, and the system specifies the default owner of a new opportunity of the class in the **Owner** box of the [Opportunities](#) (CR304000) form:

- *Do Not Change*: The current owner of the opportunity, if any
- *Creator*: The user that created the opportunity
- *Assignment Map*: A user determined by the assignment map you specify
- *From Source Entity*: The owner specified for the contact or business account from which the opportunity was created, if the opportunity was created in this way

If you want the system to distribute opportunities by using an assignment map, you must perform two preliminary tasks. You first must create a company tree on the [Company Tree](#) (EP204061) form, as described in the following section. Then you need to create the needed map for the automatic assignment of opportunities by using the [Assignment Maps](#) (EP205010) form.

You can manually assign opportunities individually or in groups. When you create or edit an opportunity on the [Opportunities](#) form, you can select an owner in the **Owner** box of the Summary area. You can also manually change the owner of an opportunity that has been manually or automatically assigned. You can assign groups of opportunities that do not have owners specified by using the [Assign Opportunities](#) (CR503110) mass-processing form. On this form, you can assign selected opportunities or all opportunities that do not have owners, and the system uses the opportunity assignment map specified on the [Customer Management Preferences](#) (CR101000) form to determine the owners of the opportunities.

The Company Tree and Workgroups

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

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

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

Assignment of Opportunities by Using Opportunity Classes

As noted previously, when you create or modify an opportunity class on the [Opportunity Classes](#) (CR209000) form, you can specify how the system automatically assigns the owner to newly created opportunities of the class by selecting the appropriate option in the **Default Owner** box on the **Details** tab (**Data Entry Settings** section). Based on the selected option for the opportunity class, when this opportunity class has been selected for an opportunity in the **Class ID** box (Summary area) of the [Opportunities](#) (CR304000) form, the system determines the default owner of this opportunity and inserts the appropriate employee name in the **Owner** box in the Summary area of the form.

In the **Default Owner** box of the [Opportunity Classes](#) form, you select one of the following options for the opportunity class:

- *Do Not Change*: If the owner has been specified in the **Owner** box of the [Opportunities](#) form for the opportunity, and you change the opportunity class in the **Class ID** box of the Summary area, the system does not clear or change the owner for this opportunity. If no owner has been specified for the opportunity, the system leaves the **Owner** box blank.
- *Creator*: When an opportunity of the class is created, the user who created the opportunity record is assigned as its owner by default.
- *Assignment Map*: When an opportunity of the class is created, based on the assignment map (which you must also select in the **Assignment Map** box for the class), the system determines the default owner or workgroup (or both) and inserts them on the [Opportunities](#) form for the new opportunity. The system inserts the workgroup of the opportunity, if applicable, on the **Details** tab. If you are assigning opportunities based on assignment maps, you can use a different assignment map for each opportunity class, if needed.
- *From Source Entity*: When an opportunity of the class is created, if it is created from another entity—such as a lead, contact, or business account—the opportunity inherits the owner and workgroup

(if specified) from this contact or business account. This default owner is assigned if you create an opportunity from a contact on the [Contacts](#) (CR302000) form or from a business account on the [Business Accounts](#) (CR303000) form.

We recommend assigning opportunities by converting leads to opportunities or, if you manually create opportunities, by using opportunity classes because the system assigns an opportunity to an owner each time a new opportunity record is created.

Assignment of Opportunities by Using Assignment Maps

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

An assignment map is a set of rules, actions related to rules, and conditions that 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 an assignment map for opportunities is created, you can do either or both of the following:

- Specify the assignment map on the [Opportunity Classes](#) (CR209000) form for the opportunity class if you have selected *Assignment Map* in the **Default Owner** box on the **Details** tab: Each new opportunity of the class will be assigned to a default owner on the [Opportunities](#) (CR304000) form according to this map. A user can change the default owner as needed.
- Specify the assignment map on the [Customer Management Preferences](#) (CR101000) form in the **Opportunity Assignment Map** box of the **General Settings** tab (**Assignment Settings** section): Existing opportunities that do not have owners will be assigned to owners based on this map as soon as you have assigned the opportunities by using the [Assign Opportunities](#) (CR503110) mass-processing form.



If an assignment map is specified for the applicable opportunity class on the [Opportunity Classes](#) form, it overrides the assignment map specified on the [Customer Management Preferences](#) (CR101000) form. Opportunities of the class will be assigned to owners based on the assignment map from the opportunity class.

Execution Errors Related to Mass-Assignment of Opportunities

If an assignment map contains errors (for example, a workgroup contains an employee who has quit the company and cannot be assigned to any records), and you have processed any opportunities that should be assigned according to this assignment map by using the [Assign Opportunities](#) (CR503110) form, the system will list these errors in the **Processing** dialog box. You can view the error by clicking the More button on the **Errors** tile. In the **Message** column, the system displays the text of the error message.

Notifications About Assigning an Opportunity to an Owner

In Acumatica ERP, an administrator can set up email notifications on the [Business Events](#) (SM302050) form so that if a user is assigned to a new opportunity, this user receives a notification by email, by SMS, or in the Acumatica mobile app. For details, see [Business Events](#).

Assigning Opportunities to Owners and Workgroups: Process Activity

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



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

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company, and you are going on vacation. You need to temporarily assign the opportunity you are working on with the *Food Clever* customer to your colleague, Pam Brawner.

You will also change the *SERVICE* opportunity class so that the user that creates a new opportunity is assigned to be its owner. Finally, you will mass-assign the unassigned opportunities of the *PRODUCT* and *PROJECT* opportunity classes to workgroups.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- On the [Company Tree](#) (EP204061) form, the company tree has been configured. It includes the *Product Sales* and the *Service Sales* workgroups, as well as the users in the *Sales* department.
- The *Pam Brawner* employee has been created on the [Employees](#) (P203000) form, and included in the *Sales* department on the [Company Tree](#) form.
- The *PRODUCT*, *PROJECT*, and *SERVICE* opportunity classes have been created on the [Opportunity Classes](#) (CR209000) form.
- On the [Assignment Maps](#) (EP205010) form, the *Opportunity Assignment Map* has been created. According to the rules (and their conditions and actions) specified in this assignment map, the opportunities of the *PRODUCT* opportunity class are assigned to the *Product Sales* workgroup in the SweetLife *Sales* department, and the opportunities of the *PROJECT* opportunity class are assigned to the *Project Sales* workgroup in the *Sales* department.

- On the [Customer Management Preferences](#) (CR101000) form, (in the **Opportunity Assignment Map** box of the **Assignment Settings** section of the **General Settings** tab), the *Opportunity Assignment Map* assignment map has been specified. The system will use this assignment map during the process of mass-assigning opportunities.
- The *STORE* business account class has been created on the [Business Account Classes](#) (CR208000) form.
- The *DEFAULT* customer class has been created on the [Customer Classes](#) (AR201000) form.
- The *FOODCLVR* business account record has been created in the system on the [Business Accounts](#) (CR303000) form and extended as a customer.
- The *Fiona Peters* contact has been created in the system on the [Contacts](#) (CR302000) form and associated with the *FOODCLVR* business account.
- The opportunity with the *Purchase of juicers by Food Clever* **Subject**, for the sale of juicers to the *Food Clever* customer, has been created on the [Opportunities](#) (CR304000) form and assigned to the sales manager, *David Chubb*.

Process Overview

In this activity, you will do the following:

1. On the [Opportunities](#) (CR304000) form, manually assign a particular opportunity to an owner.
2. On the [Opportunity Classes](#) (CR209000) form, specify how the system assigns the default owner of opportunities of a particular class.
3. On the [Assign Opportunities](#) (CR503110) form, assign selected opportunities to owners.

System Preparation

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

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

Step 1: Assigning an Opportunity to an Owner

To manually assign an opportunity to another owner, do the following:

1. Open the Opportunities (CR3040PL) form.
2. In the **Opportunity ID** column, click the link for the opportunity that has *Purchase of juicers by Food Clever* in the **Subject** box to open the opportunity with the *Food Clever* customer on the [Opportunities](#) (CR304000) form.
3. In the **Owner** box of the Summary area, notice that *David Chubb* is selected; select *Pam Brawner*.

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

You have manually assigned an opportunity to another owner.

Step 2: Specifying a Default Owner for New Opportunities of the Class

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

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

1. Open the Opportunity Classes (CR2090PL) form.
2. In the **Class ID** column, click the *SERVICE* link to open the opportunity class record on the [Opportunity Classes](#) (CR209000) form.
3. On the **Details** tab (**Data Entry Settings** section), in the **Default Owner** box, select *Creator*.
4. On the form toolbar, click **Save**.
5. Make sure that the option that you have just specified assigns new opportunities to owners correctly by doing the following:
 - a. Open the Opportunities (CR3040PL) form.
 - b. On the form toolbar, click **New Record**. A new opportunity record opens on the [Opportunities](#) (CR304000) form.
 - c. In the **Class ID** box of the Summary area, select *SERVICE*.
 - d. In the **Owner** box, notice that *David Chubb* is inserted in the box. Because this is the user account to which you are signed in and you are the creator of the opportunity, the setting of the opportunity class is causing the system to assign the owner appropriately.
 - e. In the **Subject** box, type `Juicer repair for Food Clever store`.
6. On the form toolbar, click **Save**.

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

Step 3: Assigning Multiple Opportunities to Workgroups

Suppose that at the request of the director of your sales department, you need to regularly mass-assign the unassigned opportunities of the *PRODUCT* and *PROJECT* opportunity classes to owners. The system will assign these opportunities by using the *Opportunity Assignment Map*, which has been specified on the [Customer Management Preferences](#) (CR101000) form. Based on this assignment map, the system will assign the opportunities of the *PRODUCT* opportunity class to the *Product Sales* workgroup and the opportunities of the *PROJECT* class to the *Project Sales* workgroup.

To mass-assign multiple opportunities to workgroups, do the following:

1. Open the [Assign Opportunities](#) (CR503110) form.

2. In the table, click the header of the **Owner** column.



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

3. In the Sorting and Filtering Settings dialog box, which opens, do the following to filter opportunities with no owner specified:
 - a. Select the *Is Empty* filter condition.
 - b. Click **OK**. The system closes the dialog box and applies the filter.
4. On the form toolbar, click the **Filter Settings** button.
5. In the **Filter Settings** dialog box, which opens, do the following to list the opportunities of the *PRODUCT* and *PROJECT* opportunity classes on the form, so that you can process these opportunities:
 - a. Click **Add Row** to add a row to the table.
 - b. In the **Property** box, select *Class ID*.
 - c. In the **Condition** box, select *Equals*.
 - d. In the **Value** box, select *PRODUCT*.
 - e. In the **Operator** box, select *Or*.
 - f. Click **Add Row** to add another row to the table.
 - g. In the **Property** box, select *Class ID*.
 - h. In the **Condition** box, select *Equals*.
 - j. In the **Value** box, select *PROJECT*.
 - k. Click **Apply** to apply the filter settings to the table and close the dialog box.
6. On the form toolbar, click **Process All**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning the opportunities.



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

7. Click **Close** to close the dialog box and return to the form. In the **Workgroup** column, you can see the names of the workgroups to which the system has assigned the opportunities: *Product Sales* and *Project Sales*.

You have assigned the unassigned opportunities to workgroups according to the rules specified in the *Opportunity Assignment Map* assignment map on the [Assignment Maps](#) (EP205010) form.

Lesson 2.3: Managing Events

In this lesson, you will learn how to create an activity of the *Event* type. For more information about emails and activities, see [Lesson 1.4: Managing Emails and Activities](#).

Emails and Activities: Events

In Acumatica ERP, an event is an internal scheduled occurrence with an associated start time, date, and duration, such as a meeting or a conference call. You can create events and invite other users to attend them, with invitations sent automatically by email. Also, you can receive notifications about events created by other users.

You can view the events defined in Acumatica ERP by using the [Events](#) (EP404100) form. If you are an attendee to an event, not all controls will be available to you on this form; for example, you cannot cancel or reschedule the event.

By using the [Event and Task Categories](#) (EP204040) form, you can create a list of event categories and provide a color code for each category.

On the [Event Setup](#) (EP204070) form, you can configure event scheduling and rescheduling templates, as well as email templates for automatic notifications about events to be held by employees. Automatic notifications can be configured to use the simple built-in functionality of notifications or to use notification templates that allow email personalization. If notifications are to be based on templates, the templates will be used for all users who create events.

On the [Event Attendee Statuses](#) (EP204050) form, you can add, view, edit, and delete statuses to be used for events.

Emails and Activities: To Create an Event

The following activity will demonstrate how to create an event.



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

Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have sent an email to Donna Coleman, a buyer at Yummy Supplies supermarket, with the detailed price list of the SweetLife Fruits & Jams. Donna studied the price list and would like to discuss the company products and services. Before contacting Donna, you need to consult with your colleague Joanne Simpson about new products and services that have been added to the price list in the beginning of the year.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality,

including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.

- On the [Leads](#) (CR301000) form, the *Donna Coleman* lead has been added to the system.

Process Overview

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

System Preparation

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

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

Step: Creating an Event

To create an event, do the following:

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



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

2. On the [Leads](#) (CR301000) form, which opens, open the **Activities** tab.
3. On the table toolbar, click **Add Event**. The [Event](#) (CR306030) form opens in a pop-up window.
4. On the **Details** tab, specify the following settings:
 - **Summary:** `Discussing products and services for Donna Coleman from Yummy Supplies`
 - **Location:** `SweetLife Office`
 - **Start Time:** The date and time when the event will start
 - **End Time:** The date and time when the event will end
5. On the **Attendees** tab, add the *Joanne Simpson* employee as follows:
 - a. On the table toolbar, click **Add Row**. The system adds a new row to the table.
 - b. In the **Name** box, select *Joanne Simpson*.
6. On the form toolbar, click **Save**.
7. On the table toolbar of the **Attendees** tab, click **Invite All**. A row with the *Event* type is added to the table on the **Activities** tab of the [Leads](#) (CR301000) form.

8. Close the form.

You have created an event.

Lesson 2.4: Managing Opportunities

Managing Opportunities: General Information

Acumatica ERP helps you manage your opportunities for deals by using the workflow of opportunity management. With this workflow, you can estimate revenue by using opportunity stages and create documents associated with opportunities, such as sales quotes, sales orders, service orders, and invoices.

Learning Objectives

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

- Make optimal use of the opportunity management capabilities of Acumatica ERP
- Use opportunity stages to reflect in the system the advancement of an opportunity through your sales pipeline
- Add products to an opportunity
- Create a sales quote
- Send the sales quote to a customer
- Select a primary quote for an opportunity
- Close an opportunity as won
- Extend a business account of a prospect to be a customer
- Create a sales order for an opportunity
- Send a sales order to a customer

Applicable Scenarios

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

- You sell products or services that require a continuous sales cycle, which may include product demos and the preparation of sales quotes, and you need to use the workflow of opportunity management.
- You need to create an opportunity-based sales order and send it to your customer.

Opportunity Management in Acumatica ERP

In Acumatica ERP, you can manage opportunities, including those for products or services that require a continuous sales cycle. During the sales cycle, an opportunity progresses through stages. You can define the needed opportunity stages to fit your company's business processes. Based on the defined

opportunity stages, you specify the current stage of an opportunity in the **Stage** box of the Summary area on the [Opportunities](#) (CR304000) form. For details, see [Managing Opportunities: Opportunity Stages](#).

You can customize your opportunity management workflow so that an opportunity can be moved to a particular stage based on particular conditions. For example, an opportunity can be advanced to the *Qualification* stage only if the customer's budget for the opportunity has been specified in the system.

Depending on your company's sales processes, you can manage an opportunity by performing the following steps:

1. Creating an opportunity through lead conversion or manually: For details, see [Qualifying Leads \(Sales\)](#) and [Creating Opportunities](#). You use the [Opportunities](#) (CR304000) form for tracking the settings and details related to the opportunity.

During the creation of the opportunity or at any later time, you can enter the list of products and services that your company is offering to the prospect or customer, including the prices for these products and services, on the **Document Details** tab of this form. You can apply discounts and calculate fees and taxes. For details, see [Managing Opportunities: Products and Services in an Opportunity](#).

2. Creating activities associated with an opportunity: In Acumatica ERP, you can track the prospect- or customer-related activities you perform to help your prospect or customer evaluate your products or services and make a decision to buy them. These activities may include creating emails, making phone calls, conducting meetings, or creating product demos to help your customer make an informed buying decision. You can create and track these activities by using the **Activities** tab of the [Opportunities](#) form, as described in [Managing Emails and Activities](#).
3. Creating a sales quote: From the [Opportunities](#) form, you can create a sales quote based on the opportunity, which causes the system to copy the relevant settings, including the products and services on the **Document Details** tab, to the [Sales Quotes](#) (CR304500) form. You can then finish preparing the sales quote and send it to your prospect or customer, as described in [Managing Opportunities: Sales Quotes](#). If your company's sales processes include the approval of sales quotes, you can approve the needed sales quote by using an approval map, as described in [Managing Assignment and Approval Maps](#).

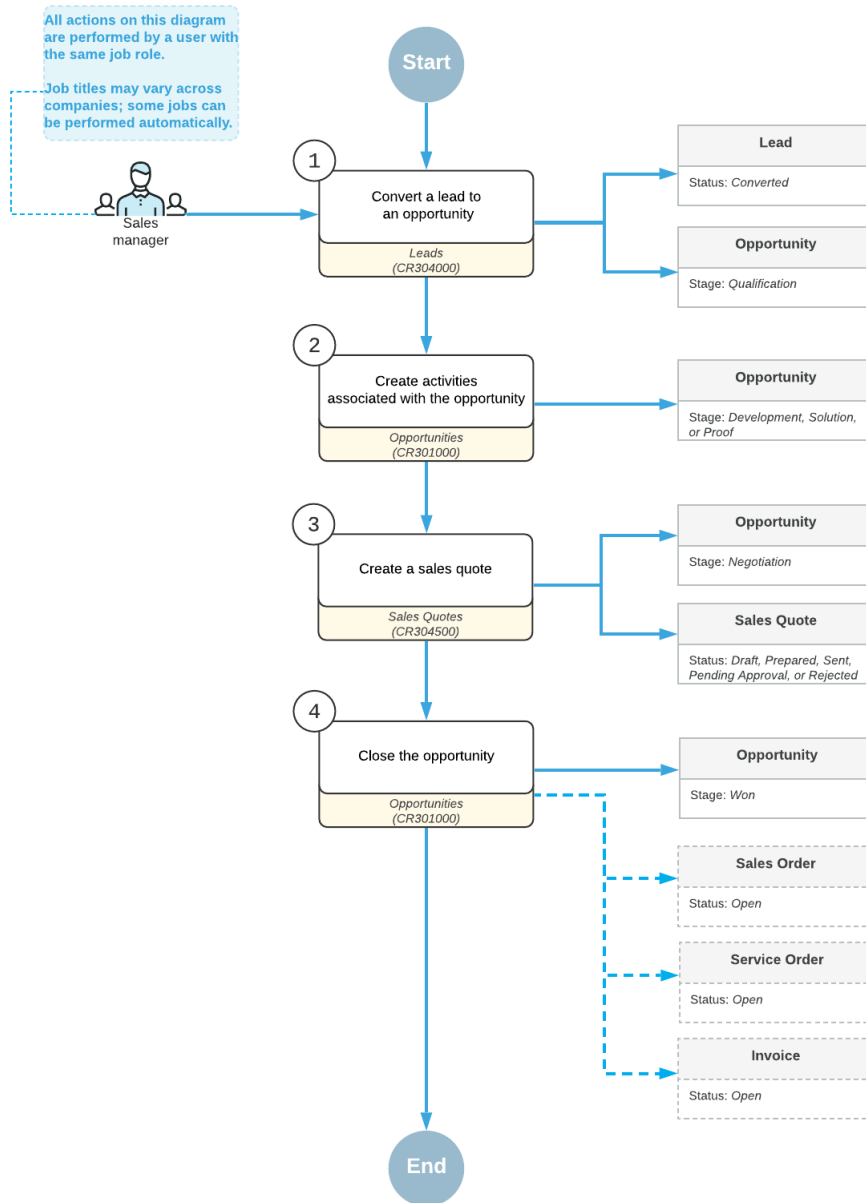
Then you discuss the offer with the prospect or the customer until it has been agreed upon or declined. If you need to create multiple sales quotes, you can mark one of them as a primary quote; the system uses the primary sales quote as the source of particular settings of the opportunity, such as the list of products, the currency and currency rate, the tax details, and the discount details.

4. Closing the opportunity: The opportunity can be closed as won or lost. For details, see [Managing Opportunities: To Create an Opportunity-Based Sales Order](#).
5. Creating a sales order based on the opportunity (optional): For details, see [Managing Opportunities: Sales Orders](#).
6. Creating a service order based on the opportunity (optional): For details, see [Processing Service Orders](#).
7. Creating an invoice based on the opportunity (optional): For details, see [Managing Opportunities: Invoices](#).

Workflow of Opportunity Management

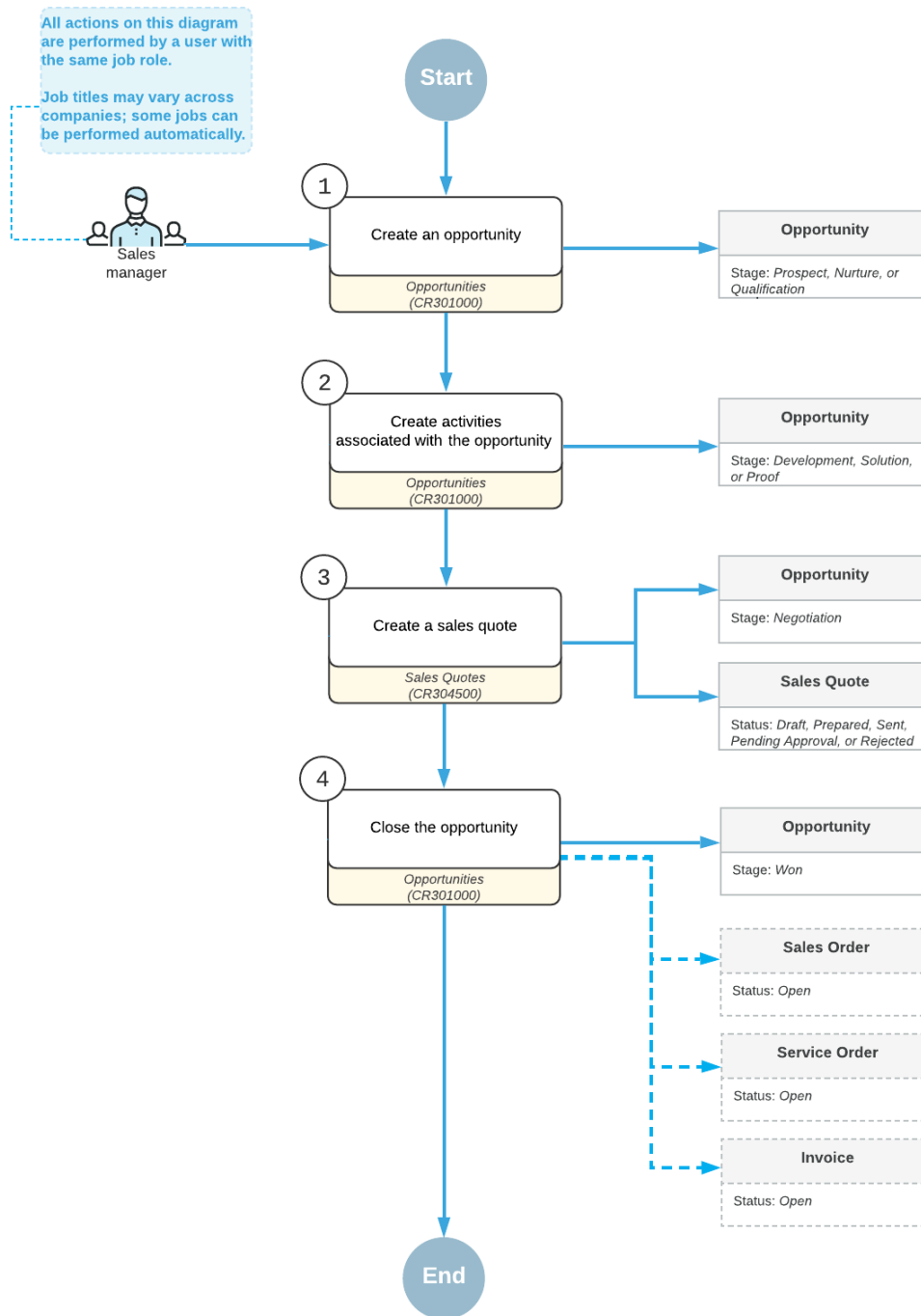
The following diagram illustrates the management of an opportunity that has been created through lead conversion.

Management of an opportunity created through lead conversion



The following diagram illustrates the management of a manually created opportunity.

Management of a manually created opportunity



Managing Opportunities: Opportunity Stages

When an opportunity is processed by a salesperson, it progresses through various stages. At any particular stage, there is a certain probability that the sale can be successfully closed. The assignment of stages to opportunities gives you the ability to estimate future sales revenue at any time. The

accuracy of revenue estimation depends heavily on the correct identification of the opportunity stage and on the accuracy of defining the specified probability.

An implementation consultant or system administrator uses the **Stages** tab of the [Opportunity Classes](#) (CR209000) form to define opportunity stages and their probabilities in your organization. The full list of opportunity stages can be available for selection to all opportunity classes, but every class may have its own set of active stages. For each opportunity class, at least one stage should be active. For details, see [Defining Opportunity Classes](#).

You specify the current opportunity stage of an opportunity in the **Stage** box of the Summary area on the [Opportunities](#) (CR304000) form.

The system offers the following predefined list of opportunity stages:

- *Prospect*: The contact or business account associated with the opportunity is a known prospect, but it is not clear whether this prospect is interested in the offered products or services.
- *Nurture*: A salesperson is collecting information about the prospect or customer's interest in products and services; the salesperson may also be negotiating with the prospect or customer. This stage may be useful if your company decides not to use leads.
- *Qualification*: A salesperson is determining the prospect or customer's interest in purchasing particular products or services.
- *Development*: A salesperson is clarifying the prospect or customer's requirements for products or services, as well as the budget, delivery schedule, and project scope (if applicable).
- *Solution*: A salesperson is negotiating with the prospect about the content of the solution (proposal) and the set of products or services that the prospect or customer wants to buy. The salesperson is creating product demonstrations or other evaluation tools, and the prospect or customer is evaluating the products or services.
- *Proof*: A salesperson has developed a solution (that is, a proposal). The prospect or customer is evaluating the solution. A primary sales quote may be selected at this stage.
- *Negotiation*: A salesperson and the prospect or customer are negotiating prices, discounts, and terms of the proposed deal.
- *Won*: The prospect or customer has accepted the proposal and is ready to sign the contract or place an order (or has already done this). Some companies prefer to advance the opportunity to this stage only after the invoice has been issued, or even after a payment is received.

Depending on your company's sales processes, any of these stages may be skipped as needed, or new stages can be created. To make a stage inactive, you clear the **Active** check box for the stage on the **Stages** tab.

Managing Opportunities: Products and Services in an Opportunity

You can add to an opportunity the products or services that you want to sell to the prospect or customer if the *Inventory* feature has been enabled on the [Enable/Disable Features](#) (CS100000) form and inventory item records of these products and services have been created on the [Stock Items](#) (IN202500) or the [Non-Stock Items](#) (IN202000) form. You add these products or services to the opportunity on the **Document Details** tab of the [Opportunities](#) (CR304000) form. Based on these products or services, you can create any of the following documents: a sales quote, a sales order, a service order, and an invoice.

The tax details for the products and services specified for the opportunity are inserted by the system on the **Tax Details** tab of the [Opportunities](#) form if taxes have been configured in your system, as described in [Taxes](#).

You can specify the information about discounts in the opportunity on the **Discount Details** tab if the *Customer Discounts* feature is enabled on the [Enable/Disable Features](#) form. You can create a discount for a customer or a group of customers (which the system will automatically apply), apply a promo code for a discount, or apply a manual discount.

Managing Opportunities: Sales Quotes

In Acumatica ERP, you can use sales quotes to present to a prospect or customer the details, including prices, of the products and services that your company is offering.

Creation of Sales Quotes

A sales quote is a document you create in Acumatica ERP on the [Sales Quotes](#) (CR304500) form to represent an offer made to a particular prospect or customer, which can be based on an opportunity; the sales quote includes a list of products and services offered at specific prices, with specific discounts and terms. You can create sales quotes in the system if the *Sales Quotes* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

You can create one sales quote or multiple sales quotes for an opportunity as you negotiate the deal with the prospect or customer. A sales quote can be printed or emailed to the specified customer for review. When the customer accepts an offer, the accepted sales quote must be selected as the primary one.

You can start creating a sales quote in any of the following ways:

- By clicking **Create Quote** on the form toolbar of the [Opportunities](#) (CR304000) form while viewing the opportunity the quote will be based on. This opens the **Create New Quote** dialog box, where you can specify basic settings. When you click **Create**, the system closes the dialog box and opens the [Sales Quotes](#) form with applicable settings filled in, so that you can view and edit the created sales quote.
- By clicking **Create Quote** on the table toolbar of the **Quotes** tab on the [Opportunities](#) form while viewing the opportunity the quote will be based on.
- By clicking **Add New Record** on the form toolbar of the [Sales Quotes](#) form. In this case, you need to enter the settings of the sales quote.
- By selecting an existing quote and then clicking the **Copy Quote** action, which is available on the **Quotes** tab on the [Opportunities](#) form and on the **Actions** menu on the form toolbar of the [Sales Quotes](#) form. This action causes a copy of the selected quote to be created.

The system uses the contact information specified on the **Contact Info** tab of the [Opportunities](#) (CR304000) form when it generates a new sales quote: The contact settings in the **Contact Information** and **Address** sections on the **Details** tab of the [Sales Quotes](#) (CR304500) form

Primary Sales Quotes

When a sales quote is created for an opportunity, the system marks this sales quote as primary by selecting the **Primary** check box in the row that has the settings of the sales quote on the **Quotes** tab of the [Opportunities](#) (CR304000) form and in the Summary area on the [Sales Quotes](#) (CR304500) form.

If multiple sales quotes are created for an opportunity, one of the sales quotes must be marked as the primary sales quote, which a user can do either during the creation of a quote or by clicking **Mark as Primary** on the [Sales Quotes](#) (CR304500) form toolbar.

An opportunity uses the primary sales quote as the source of various settings on the [Opportunities](#) (CR304000) form, such as the list of products and services, the currency and the currency rate, the location, the contact information, the tax details, and the discount details. If a user changes the sales quote marked as the primary sales quote for the opportunity, these settings are changed for the opportunity to those of the new primary sales quote.

Sales Quote Activities

On the **Activities** tab of the [Sales Quotes](#) (CR304500) form, a user can create activities associated with the selected sales quote. On the **Activities** tab of the [Opportunities](#) (CR304000) form, activities related to the selected opportunity are listed, along with activities related to all the sales quotes associated with the opportunity.

Statuses of a Sales Quote

As you are viewing a sales quote on the [Sales Quotes](#) (CR304500) form, you can see and change its status in the Summary area. A sales quote can have one of the following statuses:

- *Draft*: The sales quote is being prepared, and its details can be edited.
- *Prepared*: The sales quote is ready to be sent to the customer. The system assigns this status to a sales quote after it has been submitted or, if approval is required for sales quotes, after it has been approved.
- *Sent*: The sales quote has been emailed to the customer.
- *Pending Approval*: The sales quote is pending approval within the company.
- *Rejected*: The sales quote has been rejected by an approver within the company.

You can also see the status of an opportunity's sales quotes on the **Quotes** tab (**Status** column) of the [Opportunities](#) (CR304000) form.

Approval of Sales Quotes

Approval of sales quotes can be set up in the system if the *Approval Workflow* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Sales quotes require approval if an approval map for sales quotes has been specified in the **Approval Map** box of the **General Settings** tab (**Quote Approval Settings** section) of the [Customer Management Preferences](#) (CR101000) form.

A sales quote that is pending approval cannot be modified. An assigned approver can approve or reject the sales quote by clicking **Actions > Approve** or **Actions > Reject** on the form toolbar of the [Sales Quotes](#) (CR304500) form. After a sales quote has been approved, it can be sent to the customer.

Emailing of a Sales Quote

A user can send a prepared sales quote to a customer for review by selecting the sales quote and then clicking the **Send Quote** action, which is available on the **Quotes** tab on the [Opportunities](#) (CR304000) form and on the **Actions** menu on the form toolbar of the [Sales Quotes](#) (CR304500) form. In this case,

an email activity is created, a printable form of the sales quote is attached to the email activity, and the status of the sales quote is changed to *Sent*.

The email is generated automatically in accordance with the mailing settings specified for customer relationship management (CRM) in Acumatica ERP, which can be configured as follows:

1. On the **Mailing Settings** tab of the [Customer Management Preferences](#) (CR101000) form, all mailings that may be used in the CRM functional area of the system are listed.
2. On the **Mailing Settings** tab of the [Business Account Classes](#) (CR208000) form, all mailings that may be used for customers of the class are listed. On this form, only a mailing that is listed on the [Customer Management Preferences](#) form can be selected.
3. On the **Mailing Settings** tab of the [Business Accounts](#) (CR303000) form, all mailings that may be used for the selected customer are listed. On this form, only a mailing that is listed on the [Customer Management Preferences](#) form can be selected. If the selected mailing is not listed on the [Business Account Classes](#) form for the class of the customer account, the **Overridden** check box is selected for this mailing to indicate that the default setting has been modified.

For each mailing, the following settings may be specified:

- The email address from which the mailing will be sent; if none is specified, the system will use the default system email account
- The notification template based on which the email body will be generated
- The printed form that will be attached to the email and the format of the attachment
- The list of recipients

Managing Opportunities: Sales Orders

The **Document Details** tab of the [Opportunities](#) (CR304000) form may include detail lines that represent potential sales. A detail line may contain a stock item or a non-stock item, or it may contain no inventory items at all (that is, the **Inventory ID** column may be left blank for the line). For the opportunity, you can create a sales order if the *Inventory and Order Management* group of features is enabled on the [Enable/Disable Features](#) (CS100000) form and a business account of the *Customer* type has been selected for the opportunity. This sales order will include only the detail lines with inventory items specified. If the opportunity includes no detail lines or only detail lines with the **Inventory ID** column left blank, you cannot create a sales order based on that opportunity.

You can start creating an opportunity-based sales order by clicking **Actions > Create Sales Order** on the form toolbar of the [Opportunities](#) form. This opens the **Create Sales Order** dialog box, where you can specify basic settings, including which sales order type should be used and whether prices and discounts should be recalculated. When you click **Create**, the system closes the dialog box and opens the [Sales Orders](#) (SO301000) form with applicable settings filled in, so that you can create a sales order associated with the opportunity. For details, see [Managing Opportunities: To Create an Opportunity-Based Sales Order](#).

Managing Opportunities: Invoices

The **Document Details** tab of the [Opportunities](#) (CR304000) form may include detail lines that represent potential sales. A detail line may contain a stock item or a non-stock item, or it may contain no inventory items at all (that is, the **Inventory ID** column may be left blank for the line). For the opportunity, you can create an invoice if the *Inventory and Order Management* group of features is

enabled on the [Enable/Disable Features](#) (CS100000) form and a business account of the *Customer* type has been selected for the opportunity. This invoice will include only the detail lines with inventory items specified. If the opportunity includes no detail lines or only detail lines with the **Inventory ID** column left blank, you cannot create an invoice based on that opportunity.

You can start creating an opportunity-based invoice by clicking **Actions > Create Invoice** on the form toolbar of the [Opportunities](#) form. This opens the **Create New Invoice** dialog box, where you can specify basic settings, including whether prices and discounts should be recalculated. When you click **Create**, the system closes the dialog box and opens the [Invoices and Memos](#) (AR301000) form with applicable settings filled in, so that you can create an invoice associated with the opportunity.

Managing Opportunities: To Add Products to an Opportunity

The following activity demonstrates how to add products to an opportunity in Acumatica ERP.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Your customer, the Delicious Energy Restaurant chain, would like to purchase commercial juicers. You have discussed the purchase with Diane Doe, a procurement manager at Delicious Energy Restaurant, and have created the product demo. Now you need to add the details (in this case, products) of this order to the opportunity, which you have created in the system.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- The *CAFE* lead class has been created with the necessary settings and attributes on the [Lead Classes](#) (CR207000) form.
- The *CAFE* business account class has been created on the [Business Account Classes](#) (CR208000) form.
- The *PRODUCT* opportunity class has been created on the [Opportunity Classes](#) (CR209000) form.
- The *Diane Doe* lead has been created on the [Leads](#) (CR301000) form and converted to an opportunity as follows:
 - The *Purchase of commercial juicers by Delicious Energy* opportunity has been created on the [Opportunities](#) (CR304000) form.
 - The *DELIENERGY* business account has been created on the [Business Accounts](#) (CR303000) form.

- The *Diane Doe* contact has been created in the system on the [Contacts](#) (CR302000) form and associated with the *DELIENERGY* business account.
- The *DEFAULT* customer class has been created in the system on the [Customer Classes](#) (AR201000) form.
- The *DELIENERGY* business account has been extended as a customer, with its settings specified on the [Customers](#) (AR303000) form.
- The *JUICER15* and *JUICER20C* stock items, which hold the settings of two different commercial juicers, have been created on the [Stock Items](#) (IN202500) form.

Process Overview

In this activity, you will add products to an opportunity for the existing *DELIENERGY* business account on the **Document Details** tab of the [Opportunities](#) (CR304000) form.

System Preparation

Before you start adding products to an opportunity, you should do the following:

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

Step: Adding Products to an Opportunity

You will add to the existing opportunity the details, including prices and discounts, of the juicers in the proposed deal: five of the *JUICER15* commercial juicer, and three of the *JUICER20C* commercial citrus juicer. To add these products to the opportunity in the needed quantities, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of commercial juicers by Delicious Energy* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the [Opportunities](#) (CR304000) form.
4. On the **Document Details** tab, add products to the opportunity as follows:
 - a. On the table toolbar, click **Add Row**.
 - b. In the **Inventory ID** column of the added row, select *JUICER15*.

Notice that the system has filled in the settings for the *JUICER15* inventory item, including the **Tax Category** and **Discount, %** settings.

- c. In the **Quantity** column, type 5.
- d. In the **Discount, %** column, type 5.

A 5% discount is applied to this detail line.



If you want to specify a discount amount to be applied to the total amount of all products and services included in the opportunity, select the **Manual Amount** check box in the Summary area of the form, and then type the discount amount in the **Discount** box, which became available for editing when you selected the check box.

- e. On the form toolbar, click **Save**.

Notice that the system applied the discount that you have entered and filled in the **Discount Amount** box.

- f. On the table toolbar, click **Add Row**.
- g. In the **Inventory ID** column of the added row, select *JUICER20C*.
- h. In the **Quantity** column, type 3.

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

You have added the products and the applicable discounts and quantities to the opportunity. You can see the estimated amount for the products in the **Amount** box in the Summary area of the [Opportunities](#) form. If you create a sales quote for the opportunity, the system will add these products to the sales quote.

Managing Opportunities: To Create a Sales Quote

The following activity demonstrates how to create a sales quote in Acumatica ERP.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Your customer, the Cuisine Green Cafe chain in New York, would like to purchase juicers, and you have discussed the purchase with Roland Mercier, the cafe manager. You have created an opportunity in the system and added the details of the juicers to the opportunity. Now you need to create a sales quote to confirm the purchase with the customer and be sure both organizations are in agreement.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- The *CAFE* lead class has been created on the [Lead Classes](#) (CR207000) form.

- The *CAFE* business account class has been created on the [Business Account Classes](#) (CR208000) form.
- The *PRODUCT* opportunity class has been created on the [Opportunity Classes](#) (CR209000) form.
- The *Roland Mercier* lead has been created on the [Leads](#) (CR301000) form and converted to an opportunity as follows:
 - The *Purchase of juicers by Cuisine Green Cafe* opportunity has been created on the [Opportunities](#) (CR304000) form.
 - The *GREENCAFE* business account has been created on the [Business Accounts](#) (CR303000) form.
 - The *Roland Mercier* contact has been created in the system on the [Contacts](#) (CR302000) form and associated with the *GREENCAFE* business account.
- The *DEFAULT* customer class has been created with the necessary settings and attributes has been created in the system on the [Customer Classes](#) (AR201000) form.
- The *GREENCAFE* business account record has been extended as a customer, with its settings specified on the [Customers](#) (AR303000) form.
- The *JUICER10* and *JUICER10C* stock items, which hold the settings of two different professional series juicers, have been created on the [Stock Items](#) (IN202500) form.
- Three *JUICER10* and two *JUICER10C* stock items have been added to the *Purchase of juicers by Cuisine Green Cafe* opportunity on the **Document Details** tab of the [Opportunities](#) form.

Process Overview

In this activity, you will do the following:

1. Create a sales quote on the **Quotes** tab of the [Opportunities](#) (CR304000) form.
2. Send the sales quote to the customer by email on the [Email Activity](#) (CR306015) form.
3. Create another sales quote that contains another set of products and discounts on the [Sales Quotes](#) (CR304500) form, and set this sales quote as the primary sales quote, meaning that it contains the agreed-upon terms of the deal.

System Preparation

Before you start creating a sales quote for an opportunity, you should do the following:

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

Step 1: Creating a Sales Quote

To create a sales quote for the *Purchase of juicers by Cuisine Green Cafe* opportunity, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of juicers by Cuisine Green Cafe* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the [Opportunities](#) (CR304000) form.
4. On the **Document Details** tab, notice that the *JUICER10* and *JUICER10C* stock items have been added, to represent the juicers in the proposed deal.
5. On the form toolbar, click **Create Quote**.
6. In the **Create New Quote** dialog box, which opens, do the following:
 - a. In the **Quote Type** box, make sure that *Sales Quote* is selected.
 - b. Click **Create and Review**.

The system closes the dialog box and opens the new sales quote with the *Draft* status on the [Sales Quotes](#) (CR304500) form. On the **Document Details** tab, the system has added lines for the *JUICER10* and *JUICER10C* stock items, which it has copied from the opportunity.

7. On the **Document Details** tab, do the following:
 - a. In the line with the *JUICER10* inventory item, in the **Discount, %** box, type 5.
 - b. In the line with the *JUICER10C* inventory item, in the **Discount, %** box, type 5.
8. On the form toolbar, click **Save**.
9. On the form toolbar, click **Submit Quote**. In the Summary area, notice that the status of the sales quote has changed from *Draft* to *Prepared*. Now the sales quote can be sent to the customer for review.

You have created a sales quote. Notice that the system applied the discounts that you have entered and filled in the **Discount Amount** column for each product on the **Document Details** tab of the [Opportunities](#) form. The system has also added a row with the sales quote to the table on the **Quotes** tab of the form.

Step 2: Sending the Sales Quote to the Customer by Email

To send a sales quote to the customer by email, do the following:

1. While you are still viewing the sales quote on the [Sales Quotes](#) (CR304500) form, on the form toolbar, click **Actions > Print Quote**. The system opens the [Sales Quote](#) (CR604500) report, which displays a ready-to-print version of the sales quote, in a pop-up window.
2. On the report toolbar of the report, click **Send**.
3. On the [Email Activity](#) (CR306015) form, which opens in a pop-up window, enter a message for the customer, and on the form toolbar, click **Send**. This creates an email activity associated with the sales quote on the **Activities** tab of the [Sales Quotes](#) form. A PDF file with the sales quote is attached to the email, which is added to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically to the customer email address from the default system email account the next time this schedule is executed.



If a template of an email has been created in the system, you can skip printing the sales quote and click **Actions > Send Quote** on the form toolbar of the [Sales Quotes](#) form. The system creates an email activity associated with the sales quote, adds the email on the **Activities** tab of the form, and sends it to the customer email address from the default system email account.

Step 3: Copying a Sales Quote and Making the Sales Quote Primary

Suppose that your customer Roland Mercier has contacted you and informed you that the Cuisine Green Cafe would like to buy five *JUICER10C* juicers instead of two, but only if you give the company a 15 percent discount for the whole order. You have agreed to give the required discount. You need to create another sales quote and make this quote the primary one.

To copy a sales quote and mark this sales quote as primary, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of juicers by Cuisine Green Cafe* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the [Opportunities](#) (CR304000) form.
4. On the table toolbar of the **Quotes** tab, click **Copy Quote**.
5. In the **Copy Quote** dialog box, which opens, do the following:
 - a. In the **Description** box, correct the description as follows: 2. Purchase of juicers by Cuisine Green Cafe.
 - b. Click **OK**. The system closes the dialog box and opens the copied sales quote on the [Sales Quotes](#) (CR304500) form.
 - c. On the **Document Details** tab, do the following:
 1. In the row with the *JUICER10* inventory item, in the **Discount, %** column, type 15.
 2. In the row with the *JUICER10C* inventory item, do the following:
 1. In the **Quantity** box, type 5. This is the new quantity requested by the customer.
 2. In the **Discount, %** box, type 15.
6. On the form toolbar, click **Save**.
7. On the form toolbar, click **Mark as Primary**.

You have created a sales quote and made it the primary sales quote. Now you can submit the sales quote, which changes the status of the sales quote to *Prepared*, and send the new sales quote to the customer.

Managing Opportunities: To Create an Opportunity-Based Sales Order

The following activity demonstrates how to create a sales order that is based on an opportunity in Acumatica ERP.



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

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. Your potential customer, the Greenex Cafe, would like to purchase apple and banana jams, and both companies have agreed to the deal. You need to close the opportunity as won, extend the *GREENEX* business account as a customer, create a sales order based on the opportunity, and send the sales order to the customer.

Configuration Overview

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

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- The *CAFE* lead class has been created on the [Lead Classes](#) (CR207000) form.
- The *CAFE* business account class has been created on the [Business Account Classes](#) (CR208000) form.
- The *DEFAULT* customer class has been created on the [Customer Classes](#) (AR201000) form.
- The *PRODUCT* opportunity class has been created on the [Opportunity Classes](#) (CR209000) form and selected on the [Lead Classes](#) (CR207000) form.
- The *Catherine Hoff* lead has been created on the [Leads](#) (CR301000) form and converted to an opportunity as follows:
 - The *Purchase of jams by Greenex Cafe* opportunity has been created on the [Opportunities](#) (CR304000) form.
 - The *GREENEX* business account has been created on the [Business Accounts](#) (CR303000) form.
 - The *Catherine Hoff* contact has been created in the system on the [Contacts](#) (CR302000) form and associated with the *GREENEX* business account.
- The *APJAM96* and *BANJAM96* stock items, which hold the settings of apple and banana jams, have been created on the [Stock Items](#) (IN202500) form.
- Five *APJAM96* and five *BANJAM96* stock items have been added to the *Purchase of jams by Greenex Cafe* opportunity on the **Document Details** tab of the [Opportunities](#) form.

Process Overview

In this activity, you will do the following:

1. Close the *Purchase of jams by Greenex Cafe* opportunity as won on the [Opportunities](#) (CR304000) form.

2. Extend the *GREENEX* business account as a customer on the [Business Accounts](#) (CR303000) form.
3. Starting on the [Opportunities](#) form, create a sales order associated with the *Purchase of jams by Greenex Cafe* opportunity, which opens the [Sales Orders](#) (SO301000) form with the sales order.
4. Starting on the [Sales Orders](#) form, send the sales order to the customer by email, which opens the [Email Activity](#) (CR306015) form.

System Preparation

Before you start creating an opportunity-based sales order, you should do the following:

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

Step 1: Closing an Opportunity as Won

To close the *Purchase of jams by Greenex Cafe* opportunity as won, do the following:

1. Open the Opportunities (CR3040PL) form.
2. Locate the row with *Purchase of juicers by Greenex Cafe* in the **Subject** column.
3. In this row, click the link in the **Opportunity ID** column. The opportunity opens on the [Opportunities](#) (CR304000) form.
4. On the form toolbar, click **Close as Won**.
5. In the **Details** dialog box, which opens, do the following:
 - a. In the **Stage** box, select *Won*.
 - b. Click **OK**. The system closes the dialog box. Most of the settings of the opportunity on the [Opportunities](#) form become unavailable for editing.

You have closed the opportunity as won.

Step 2: Extending the Business Account as a Customer

Because a sales order requires the selection of a customer defined in the system and you are ready to create a sales order for the Greenex Cafe, you need to extend the *GREENEX* business account as a customer, which preserves the business account in the system and creates a related customer account.

To extend the business account as a customer, do the following:

1. While you are still viewing the *Purchase of juicers by Greenex Cafe* opportunity on the [Opportunities](#) (CR304000) form, in the Summary area, click the Edit button right of the **Business Account** box.

2. On the [Business Accounts](#) (CR303000) form, which opens in a pop-up window, click **Extend as Customer** on the form toolbar. The system closes the form and opens the [Customers](#) (AR303000) form in a pop-up window.
3. In the **Customer Class** box, select *DEFAULT*.
4. On the form toolbar, click Save and Close.

You have extended the *GREENEX* business account as a customer. The system changes the type of the business account from *Business Account* to *Customer* in the Summary area of the [Business Accounts](#) form. Now you can create a sales order based on the opportunity.

Step 3: Creating a Sales Order

To create an opportunity-based sales order for the *GREENEX* customer, do the following:

1. While you are still viewing the *Purchase of juicers by Greenex* opportunity on the [Opportunities](#) (CR304000) form, on the form toolbar, click **Actions > Create Sales Order**.
2. In the **Create Sales Order** dialog box, which opens, do the following:
 - a. In the **Order Type** box, make sure that *Sales Order* is selected.
 - b. Click **OK**. The system closes the dialog box and opens the [Sales Orders](#) (SO301000) form with a new sales order that contains many of the settings copied from the opportunity. Notice that on the **Document Details** tab, the lines contain the product data specified on the same tab of the opportunity.
3. On the form toolbar, click Save and Close. The system closes the [Sales Orders](#) form and returns you to the [Opportunities](#) form.
4. On the **Orders** tab, notice that the system has added a row that holds the summary settings of the newly created sales order.

Step 4: Sending the Sales Order to the Customer by Email

To send the sales order to the customer by email, do the following:

1. While you are still viewing the *Purchase of juicers by Greenex Cafe* opportunity on the **Orders** tab of the [Opportunities](#) (CR304000) form, in the **Order Nbr.** column, click the link to the sales order that you have created in the previous step. The system opens the sales order on the [Sales Orders](#) (SO301000) form in a pop-up window.
2. On the form toolbar, click **Reports > Print Sales Order**. The system opens the [Sales Order](#) (SO641010) report, which displays a printable version of the sales order, in a pop-up window.
3. On the report toolbar, click **Send**.
4. On the [Email Activity](#) (CR306015) form, which opens in a pop-up window, do the following:
 - a. In the **From** box, select *sales@sweetlife.com*.
 - b. In the text editor area, notice the template of the message for the customer. You can change the information in the message if needed.
 - c. On the form toolbar, click **Send**. The system closes the form and sends an email to the customer email address from the default system email account.



If a template of an email has been created in the system, you can skip printing a sales order and click **Actions > Email Sales Order** on the form toolbar of the [Sales Orders](#) form. The system sends the email to the customer's email address from the system email account that you have selected.

You have sent the sales order to the customer by email.



If you want to see emails associated with the sales order, on the title bar of the [Sales Orders](#) form for the sales order, click **Activities**. In the **Tasks & Activities** dialog box, which opens in a pop-up window, you can see the list of these emails. You can click the link to the needed email to view the email on the [Email Activity](#) form.