End-User Course

CRM Support Operations

Training Guide

Acumatica
The Cloud ERP

Contents

Copyright

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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 customer support processes in a small company. The course consists of the lessons that guide you step by step through the examples and explanations of the CRM support 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: Creating Cases

Cases: General Information

Cases (also referred to as *support cases* or *tickets*) help your company track customer requests, questions, problems, and other inquiries submitted by email, phone, website, or live chat and find the solutions requested by your customers. Acumatica ERP gives you the ability to easily create and track cases based on your customers' requests. This topic provides information about creating cases in Acumatica ERP.

Learning Objectives

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

● Become familiar with the ways of creating cases in Acumatica ERP

● Develop a general understanding of case settings

● Create a case manually

Applicable Scenarios

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

● You have received a request from your customer about your company's products or services and need to create a case in the system.

● Your customer has created a case on the Acumatica Self-Service Portal, and you need to solve the customer's problem related to the product or service that your company offers.

Creation of Cases in Acumatica ERP

In Acumatica ERP, a case is a record created and viewed on the *Cases* (CR306000) form that represents a new, open, or closed request from a customer and has a variety of settings, such as the customer, the status of the case, and the user responsible for the case (that is, the owner of the case).

A case can be created in any of the following ways:

● By a user manually entering the case data on *Cases* form

● By a customer using the Acumatica Self-Service Portal

● By a user using the Acumatica mobile app

● By a user using the Acumatica add-in for Outlook

Settings of a Case

You can enter, view, and modify (if applicable) the following case settings on the *Cases* (CR306000) form:

● In the Summary area, basic settings, such as the case's ID, date reported, case class, customer, contact, owner, status, subject, priority, and description. You can also specify the severity of the case, which may also relate to a time requirement; the reaction time (which determines the

service level agreement) corresponding to each severity level is defined by the case class. (For details, see *Case Classes: Severity Levels and Response Times*.)

- On the **Details** tab, the description of the case.

- On the **Additional Info** tab, the customer settings, such as the business account, location, billing settings (billable work hours and billable overtime hours), workgroup, and time-related settings (work hours, overtime hours, and total hours spent on the case). For details about billing, see *Managing Cases: Billable Cases*.

  You can also specify a contract or default contract if the *Contract Management* feature has been enabled on the *Enable/Disable Features* (CS100000) form. Contract cases require specifying a contract on entry, and standalone cases require specification of the customer and the customer's case class, which determines the default contract. For details, see *Managing Cases: Billable Cases*.

- On the **Attributes** tab, the list of attributes, if they have been defined for the case class on the *Case Classes* (CR206000) form. Attributes may be used to help your company manage specific information that is useful for its business, such as the industry or number of employees.

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

- On the **Activities** tab, emails, tasks, and activities associated with the case. You can use this tab as a starting point for adding activities and for viewing the activities that have been performed.

- On the **Related Cases** tab, the list of cases that block, depend on, are duplicates of, or are otherwise associated with this particular case (if any). For details, see *Managing Cases: General Information*.

Cases: To Create a Case Manually

The following activity demonstrates how to manually create a case and specify basic settings for this case.

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

Story

Suppose that you are a customer service representative of the SweetLife Fruits & Jams company. You have received a phone call from your customer, Kevin Grey, who is a buyer at the Groceriex chain of supermarkets in New York. Kevin ordered 25 jars each of apple, orange, and cherry jam, but only 15 jars of orange jam were delivered. (The other jams were delivered in full.) You need to arrange the delivery of 10 jars of orange jam to Groceriex within three working days.

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:

- *Customer Management*: This feature provides the customer relationship management (CRM) functionality.

- *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.

- On the *Attributes* (CS205000) form, the *PRODUCT* attribute for cases has been created.

- On the *Case Classes* (CR206000) form, the *DELIVERY* case class, which defines cases related to the sale and delivery of products, has been created.

- On the *Customer Management Preferences* (CR101000) form, in the **Default Case Class** box, the *DELIVERY* case class has been specified.

- In the Summary area of the *Cases* (CR306000) form, the **User-Defined Fields** tab, which holds the values of attributes, has been added.

Process Overview

In this activity, you will manually create a case on the *Cases* (CR306000) form.

System Preparation

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

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

   - Username: *garcia*

   - Password: *123*

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

Step: Creating a Case Manually

To manually create a case for the request submitted by Kevin Grey of *GROCERIEX*, do the following:

1. Open the Cases (CR3060PL) form.

2. On the form toolbar, click **New Record**.

3. In the Summary area of the *Cases* (CR306000) form (**Document** tab), which opens, do the following:

   a. In the **Class ID** box, select *DELIVERY*.

   b. In the **Business Account** box, select *GROCERIEX*.

   c. In the **Contact** box, select *Kevin Grey*.

   d. In the **Subject** box, type `Delivery of the missing 10 jars of orange jam`.

   e. In the **Severity** box, select *Low*. Notice that in the **SLA** box, the system has inserted the date and time within which the delivery should occur.

According to the settings specified for the *DELIVERY* case class on the **Reaction** tab of the *Case Classes* (CR206000) form, if a case has low severity, you have 5 working days to deliver the jam to the customer.

    f. In the **Priority** box, select **Medium**.

4. On the **User-Defined Fields** tab of the Summary area, in the **Products for sale** box, select *Orange jam 96 oz*.

    Products for sale is the description of the *PRODUCTS* attribute that was defined for the case class; the description of an attribute is used as its name on the UI.

5. On the **Details** tab of the form, in the text editor area, type `10 jars of orange jam were not delivered to GROCERIEX`.

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

You have created a case based on the request from the existing *GROCERIEX* customer.

Lesson 2: Assigning Cases to Owners and Workgroups

Assigning Cases to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the case workload within the company. You can use assignment maps to indicate to the system how to assign cases to individuals or groups of people (that is, to owners or workgroups). In the following sections, you will find information about assigning cases to owners and workgroups one by one or through mass processing.

Learning Objectives

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

- Assign a case manually to a particular owner

- Assign a selected group of cases to owners or workgroups by using a case assignment map

Applicable Scenarios

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

- You need to manually assign or reassign a case to another owner or workgroup.

- You need to assign a selected group of cases to owners by using a case assignment map.

Assignment of Cases to Owners and Workgroups in Acumatica ERP

In Acumatica ERP, you can easily base the rules for case assignment on company policies because cases can be assigned to owners or workgroups in many different ways, based on the settings and attributes of the case records being assigned. You can assign cases manually or automatically by using a case assignment map.

To manually assign a case individually, when you create or edit the case on the *Cases* (CR306000) form, you can select an owner in the **Owner** box of the Summary area. By using this box, you can also manually change the owner of a case that has been manually or automatically assigned.

You can assign groups of cases that do not have owners specified by using the *Assign Cases* (CR503210) mass-processing form. On this form, you can assign selected cases or all cases that do not have owners, and the system uses the case assignment map specified in the **Case Assignment Map** box (in the **Assignment Settings** section of the **General Settings** tab) of the *Customer Management Preferences* (CR101000) form to determine the owners of the cases.

If you want the system to distribute cases by using an assignment map, you must perform two tasks. You first create a company tree, described in the next section, on the *Company Tree* (EP204061) form. Then you create the needed map for the automatic assignment of cases by using the *Assignment Maps* (EP205010) form. For detailed instructions on configuring assignment maps, see *Configuring Assignment Maps*.

The Company Tree and Workgroups

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

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

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

Execution Errors Related to the Mass-Assignment of Cases

If an assignment map contains errors (for example, a workgroup contains an employee who has quit the company and cannot be assigned to any records) and you have processed any cases that should be assigned according to this assignment map by using the *Assign Cases* (CR503210) form, the system will list these errors in the **Processing** dialog box. You can view the error by clicking the More button on the **Errors** tile. In the **Message** column, the system displays the text of the error message.

Notifications About Assigning a Case to an Owner

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

Assigning Cases to Owners and Workgroups: Process Activity

The following activity demonstrates how to assign cases to owners. You will practice assigning cases to the appropriate owners, both manually for an individual case and by using the mass-processing form to assign multiple cases to the needed owners.

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

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. You have received a phone call from your customer, Delicious Energy Restaurant, about the repair of a juicer. You have created a case and need to assign the case to your colleague, Jeffrey Vega, who is a technician in SweetLife.

Further suppose that later that day you have checked the cases in your system and noticed that a few of them were not assigned to owners and workgroups. You need to assign these unassigned cases to the appropriate owners and workgroups.

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:

  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality.

  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.

- On the *Case Classes* (CR206000) form, the *PRESALE*, *DELIVERY*, and *JREPAIR* case classes have been created.

- On the *Assignment Maps* (EP205010) form, the *Case Assignment Map* has been created. According to the rules (and their conditions and actions) specified in this assignment map, cases are assigned as follows:

  - The cases of the *PRESALE* case class are assigned to David Chubb.

  - The cases of the *DELIVERY* case class are assigned to the *Delivery* workgroup in the SweetLife *Aftersales* department.

  - The cases of the *JREPAIR* case class are assigned to the *Technical Support* workgroup in the *Aftersales* department.

- On the *Customer Management Preferences* (CR101000) form (in the **Case Assignment Map** box of the **Assignment Settings** section of the **General Settings** tab), the *Case Assignment Map* assignment map has been specified. The system will use this assignment map during the process of mass-assigning cases.

- On the *Cases* (CR306000) form, the case that has the *Repair of a juicer for Delicious Energy Restaurant* subject has been created.

Process Overview

In this activity, you will do the following:

1. On the *Cases* (CR306000) form, manually assign a particular case to an owner.

2. On the *Assign Cases* (CR503210) form, assign all the unassigned cases to owners.

System Preparation

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

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

   - Username: *chubb*

- Password: *123*

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

Step 1: Assigning a Case to an Owner

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

1. Open the Cases (CR3060PL) form.

2. In the **Case ID** column, click the link for the case that has *Repair of a juicer for Delicious Energy Restaurant* in the **Subject** column to open the case for the *DELIENERGY* customer on the *Cases* (CR306000) form.

3. In the **Owner** box of the Summary area, select *Jeffrey Vega*.

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

You have manually assigned a case to an owner.

Step 2: Assigning the Unassigned Cases to Owners and Workgroups

Suppose that you need to assign all the currently unassigned cases to owners and workgroups.

To mass-assign cases to owners, do the following:

1. Open the *Assign Cases* (CR503210) form.

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

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

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

   a. Select the *Is Empty* filter condition.

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

4. On the form toolbar, click **Process All**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning cases. Based on the settings specified for the *Case Assignment Map* on the *Assignment Maps* (EP205010) form in the *U100* dataset, all the selected cases have been assigned to the *Delivery* workgroup, the *Technical Support* workgroup, or David Chubb.

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

> (i) In situations when you want to assign only selected cases to owners, you would select unlabeled check boxes in the table for the needed cases and click the **Process** button on the form toolbar.

5. Click **Close** to close the dialog box and return to the form. For the cases that had not been assigned to owners or workgroups, the system has inserted either the name of the workgroup in the **Workgroup** column, or *David Chubb* in the **Owner** column.

You have assigned the unassigned cases to owners or workgroups, with the system using the rules specified in the case assignment map.

Lesson 3: Managing Cases

Managing Cases: General Information

Acumatica ERP provides tools that help your customer support team create, track, and resolve cases.

Learning Objectives

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

- Make optimal use of the case management capabilities of Acumatica ERP

- Develop a general understanding of billing settings for a case and case-related activities

- Process a case and notice the states of its life cycle

- Create an email and an activity associated with a case

- Associate a case with other cases

- Prepare and review an accounts receivable invoice for the case

Applicable Scenarios

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

- You have investigated the issue related to a case and need to record your work on the case.

- You have resolved a case and need to bill the customer for the work performed on it.

- You need to understand how many cases your team has in the backlog.

Case Management in Acumatica ERP

In Acumatica ERP, you can reassign, process, and escalate cases. The processing of cases is described further in this topic. You can also associate a case with another case, if needed, as described in *Relationships Between Cases*.

Depending on your company's customer support processes, you can manage a case by performing the following steps:

1. Creating a case in the system: On the *Cases* (CR306000) form, you create a case to record the customer's request or problem. For details, see *Creating Cases*.

2. Searching for a solution: This step may involve communication with the customer support team, your company, and the customer, as well as any needed external communication, in order to find the solution for the customer's request or problem.

3. Creating activities associated with the case (optional): In Acumatica ERP, you can track the activities you perform to resolve the case. These activities may include creating emails, making phone calls, or conducting meetings. You can create and track these activities by using the **Activities** tab of the *Cases* form.

4. Closing the case on the *Cases* form.

5. Releasing the case activities, the case, or both the case and the activities, and billing the customer by creating an invoice based on the case or the case activities (optional step): Individual cases are billed once they are released, and cases that are managed according to a contract are billed in batches when it is time to issue an invoice for the contract. For details, see *Managing Cases: Billable Cases*.

Workflow of Case Processing

The following diagram illustrates the processing of a case in Acumatica ERP.

Case Processing Workflow

All actions on this diagram are performed by a user with the same job role.

Job titles may vary across companies; some jobs can be performed automatically.

Start

Customer support representative

1 Create a case
Cases (CR306000)

Case
Status: *New*

2 Searching for a solution related to the case

Case
Status: *Open*

3 Create activities associated with the case
Cases (CR306000)

Case
Status: *Open* or *Pending Customer*

Has a solution been found?

No

Yes

4 Close the case
Cases (CR306000)

Case
Status: *Closed*

5 Release the case
Cases (CR306000)

Case
Status: *Released*

Invoice
Status: *Balanced*

End

LEGEND

———— Required action

- - - - - Optional action

Processing of a Case Through States

In Acumatica ERP, as a case is being processed by a customer support team, it progresses through various states. Each state is represented in the system by a status, which is displayed in the **Status** box in the Summary area of the *Cases* (CR306000) form. Because the system updates the status of the case during processing, the **Status** box is unavailable for editing. A user can initiate transitions between case states—which causes the system to update the status accordingly—by clicking actions on the form toolbar of the *Cases* form. The *priority action*—the action that is the expected next step in the workflow—is displayed as a button on the form toolbar.

In Acumatica ERP, a case may be assigned one of the following statuses:

- *New*: The case has been created in the system, but no work has been done on it yet. A case with this status can have the *Unassigned*, *Assigned*, or *Opened on Portal* value in the **Reason** box of the Summary area.

- *Open*: The case is being worked on by a support team. A case with this status can have any of the following values in the **Reason** box: *Assigned*, *In Process*, *Updated*, *In Escalation*, or *Pending Closure*.

- *Pending Customer*: The support team is waiting for a response or feedback from a customer. A case with this status can have any of the following values in the **Reason** box: *More Info Requested*, *Waiting Confirmation*, or *Pending Closure*.

- *Closed*: The customer's problem has been resolved, a solution has been found, or no further work is expected to be done on the case. A case with this status can have any of the following values in the **Reason** box: *Resolved*, *Rejected*, *Canceled*, *Abandoned*, or *Duplicate*.

- *Released*: The AR invoice for the works performed has been generated for a customer on the *Invoices and Memos* (AR301000). A case with this status has the *Resolved* value in the **Reason** box.

You can analyze case processing and productivity-related metrics for your support team by generating support reports. For details, see *Support Reports: General Information*.

Relationships Between Cases

A case can be associated with other cases. For example, a case might be defined so that it cannot be resolved until another case, known as a "blocker" case, is resolved.

> ⚠️ The relations between cases can be specified only for informational purposes, so that your customer support team can track and enforce these relations; these relations are not enforced by the system.

On the **Related Cases** tab of the *Cases* (CR306000) form, you can list cases related to the current case, and specify one of the following relations for each listed case:

- *Blocks*: The current case should not be closed before the listed case, which is a blocker case, has been closed.

- *Depends On*: The listed case depends on the current case.

- *Related*: There is a "peer" relation between the case with this relation and the current case. That is, neither case blocks or depends on the other case, but the two cases are related in some way.

- *Duplicate Of*: The current case is a duplicate of the listed case.

Managing Cases: Billable Cases

In Acumatica ERP, your customer support team can bill customers for cases and create and track billable emails and activities—such as phone calls, appointments, and any other time spent on the case —associated with the case. Based on these emails and activities, you can bill customers for the time that your support team has spent on processing the case, based on the released activities.

In Acumatica ERP, the billing settings of a case are defined by the settings of the billing mode that is specified for the case class on the **Details** tab of the *Case Classes* (CR206000) form. If a case is billable, on the **Additional Info** tab of the *Cases* (CR306000) form, the system selects the **Billable** check box and makes it unavailable for editing. Activities that are associated with the case can be billable or not billable; this setting should be specified for the case class. For details, see *Defining Case Classes*.

Cases and case-related activities can be billed in accordance with a specific contract or a default contract associated with the case class if the *Time Reporting on Activity* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Case-Based Billing Settings

For a case of a class that has the *Per Case* billing mode selected in the **Billing Mode** box on the **Details** tab of the *Case Classes* (CR206000) form, you can do the following:

- Release the case for billing if the case has the *Closed* status. If any activity related to the case has not been completed yet (and approved, if approval is required), you cannot release the case.

- Release the case for billing on the *Cases* (CR306000) form; you can also mass-release cases on the *Release Cases* (CR507000) form.

- Manually override the total number of billable hours of the case on the *Cases* form. The invoice total includes the total number of billable hours that have been reported for the activities associated with the case. If the *Time Reporting on Activity* feature is disabled, manually overriding the number of billable hours is the only way you can report the time spent on a case; the customer will then be billed based on the time that you have specified.

- If the case is associated with a contract, enable case counting by specifying an item in the **Case Count Item** box of the **Summary** tab (**Case Billing Settings** section) of the *Contract Templates* (CT202000) form. With case counting, you can bill your customer for only the number of cases associated with the contract. The billable hours reported for the case will also be billed. For details, see *Managing Contracts*.

- Use direct billing, which means that the customer associated with the case is billed directly without any contract involved. You must clear the **Require Contract** check box on the *Case Classes* form to use direct billing for cases of the class.

Activity-Based Billing Settings of a Case

If a case that has the *Per Activity* billing mode selected in the **Billing Mode** box on the **Details** tab of the *Case Classes* (CR206000) form, the case must be associated with a contract so that related activities can be billed according to the costs defined by this contract.

For a case of the class has the *Per Activity* billing mode, you can do the following:

- Bill the customer for separate activities when the case is not yet closed. This mode may be useful when the case cannot be closed by the end of the billing period, although you need to bill the customer for the services already rendered.

- Release only the activities associated with the case on the *Release Time Activities* (EP507020) form. The case cannot be marked as billable and released for billing.

For details about billable activities associated with a case, see the following section.

Billable Activities Associated with a Case

In Acumatica ERP, you can bill a customer for an email or an activity that is associated with a case and marked as billable. If there are any tasks or events associated with the case, the activities related to these tasks and events are billed as activities related to the case.

Before you can create a case-related invoice for an activity, make sure that the following tasks have been performed in the system:

1. The activity has been marked as billable on the *Activity* (CR306010) form, with the **Track Time** check box selected and the hours specified in the **Billable Time** check box.

2. The activity has been completed (that is, it has the *Completed* **Status**).

3. If approval of activities is required, the activity has been approved for billing. For details, see *Time Activities*.

4. The activity has been released.

You can release a completed and approved (if required) activity for billing in one of the following ways:

- By releasing a time card on the *Release Time Cards* (EP505010) form if the owner of the activity uses time cards

- By using the *Release Time Activities* (EP507020) form

- By releasing the related case if the case is billed within the *Per Case* billing mode

When a contract-related case is released for billing, the contract usage data is updated. You can view the resulting data on the *Contract Usage* (CT303000) form. For more information on how contract-related cases are billed, see *Contract Billing*.

You use the *Invoices and Memos* (AR301000) form to view the invoices that were generated during direct billing.

You can view the data on the resulting customer transactions by using the *Customer History* (AR652000) report.

Billable Activities Associated with a Project

If a case activity is associated with a project, a project transaction may be created during direct billing. Alternatively, the same project transaction may be generated during the release of the time card that includes the case activity if the time card is released before the case is billed. For details about time card release, see *Time Cards*. These project transactions can be used for tracking the project costs. For details about project cost tracking, see *Project Budget: General Information*.

Managing Cases: To Process a Non-Billable Case

The following activity demonstrates how to process a non-billable case in Acumatica ERP.

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

Story

Suppose that you are Jeffrey Vega, a technician at the SweetLife Fruits & Jams company. David Chubb, a sales manager, has created a case in the system based on a phone call from Chuck Hester, who is a purchase manager at Fruitland, a store in Baltimore. Chuck Hester is thinking of purchasing a commercial juicer from SweetLife, and Fruitland has a number of accessories for a similar juicer. Chuck needs to know if these accessories (the feeder kit and the peel ejector kit) suit the juicer that he might buy.

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:

  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.

  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.

- On the *Attributes* (CS205000) form, the *ORGSIZE* and *INTERESTED* attributes for cases have been created.

- On the *Case Classes* (CR206000) form, the *PRESALE* case class, which defines cases related to the sale and delivery of products, has been created.

- On the *Cases* (CR306000) form, a case has been created that has *Request for compatibility of accessories* in the **Subject** column.

- The *FRUITLAND* business account record has been extended as a customer, with its settings specified on the *Customers* (AR303000) form.

Process Overview

In this activity, you will do the following:

1. Open the case on the *Cases* (CR306000) form.

2. Create an email on the *Email Activity* (CR306015) form to reply to the customer's request.

3. Close the case on the *Cases* (CR306000) form.

System Preparation

Before you start working on the case, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as technician Jeffrey Vega by using the following credentials:

    - Username: *vega*

    - Password: *123*

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

Step 1: Opening the Case

To open the case for the request from the *FRUITLAND* customer, do the following:

1. Open the Cases (CR3060PL) form.

2. In the row with *Request for compatibility of accessories* in the **Subject** column, click the link in the **Case ID** column. The case opens on the *Cases* (CR306000) form.

3. On the form toolbar, click **Take Case**. Notice that in the **Owner** box, the system has inserted *Jeffrey Vega*.

4. Click **Open**.

5. In the **Details** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

You have opened the case. Notice that in the Summary area of the *Cases* form, the system has inserted *Open* in the **Status** box and *In Process* in the **Reason** box.

Step 2: Creating the Case-Related Email

Suppose that you have verified that the feeder kit and the peel ejector kit are compatible with the *JUICER10C* model.

To send an email to Chuck Hester communicating this information, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, open the **Activities** tab.

2. On the table toolbar, click **Add Email**. The *Email Activity* (CR306015) form opens in a pop-up window. Notice that in the **To** box, the system has inserted the contact's name, *Chuck Hester*, and in the **Subject** box, the system has inserted the ID and the subject of the case.

3. In the **From** box, select the *support@sweetlife.com*.

4. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

    ```
    Dear Chuck,

    I am happy to confirm that the feeder kit and the peel ejector kit are compatible
    with the JUICER10C. You can easily use them with the juicer at your convenience.
    ```

5. On the **Details** tab, select the **Internal** check box to hide the email from the Self-Service Portal users.

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

7. Click **Send**. The system closes the *Email Activity* (CR306015) form and returns you to the *Cases* form. Notice that a row with the *Email* type is added to the table on the **Activities** tab of the *Cases* form.

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

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

Step 3: Closing the Case

To close the case for the *FRUITLAND* customer, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, on the form toolbar, click **Close**.

2. In the **Details** dialog box, which opens, do the following:

   a. In the **Reason** box, select *Resolved*.

   b. Click **OK**. The system closes the dialog box and returns you to the form.

You have closed the case. Notice that in the Summary area of the *Cases* form, the system has inserted *Closed* in the **Status** box and *Resolved* in the **Reason** box.

Managing Cases: To Process a Billable Case

The following activity demonstrates how to process a billable case that has the *Per Case* billing mode in Acumatica ERP.

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

Story

Suppose that you are Jeffrey Vega, a technician at the SweetLife Fruits & Jams company. You have received by email a request for the repair of a juicer from your customer Tonya Lawrence, a buyer at Storehut, a chain of supermarkets in New York. You have created a case in the system based on the email from Tonya and assigned the case to yourself. You need to repair the juicer, record the results of the repair in the system, and release the case for billing, causing an invoice to be created for the fixing of the juicer.

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:

  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.

  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.

- On the *Attributes* (CS205000) form, the *MODEL* attribute for cases has been created.

- On the *Case Classes* (CR206000) form, the *JREPAIR* case class, which defines cases related to the repair and maintenance of juicers, has been created. The *Per Case* billing mode has been specified for this case class.

- On the *Cases* (CR306000) form, a case has been created that has the *Request for juicer repair from Storehut* in the **Subject** column.

- The *STOREHUT* business account record has been extended as a customer, with its settings specified on the *Customers* (AR303000) form.

Process Overview

In this activity, you will do the following:

1. Open the case on the *Cases* (CR306000) form.

2. Create a billable email on the *Email Activity* (CR306015) form to record the results of the repair and inform the customer about fixing the juicer.

3. Create a billable activity of the *Appointment* type on the *Activity* (CR306010) form to record the results of delivering the repaired juicer to the client.

4. Close the case on the *Cases* form.

5. Release the case for billing on the *Cases* form, which causes the system to generate an AR invoice on the *Invoices and Memos* (AR301000) form.

6. View the AR invoice on the *Invoices and Memos* form.

System Preparation

Before you start working on the billable case, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in to the system as technician Jeffrey Vega by using the following credentials:

   - Username: *vega*

   - Password: *123*

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

Step 1: Opening the Case

To open the case for the request from the *STOREHUT* customer, do the following:

1. Open the Cases (CR3060PL) form.

2. In the row with *Request for juicer repair from Storehut* in the **Subject** column, click the link in the **Case ID** column. The case opens on the *Cases* (CR306000) form.

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

4. In the **Details** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

You have opened the case. Notice that in the Summary area of the *Cases* form, the system has inserted *Open* in the **Status** box and *In Process* in the **Reason** box.

Step 2: Creating a Billable Email Associated with the Case

Suppose that you have fixed the juicer and need to record the billable time for the repair in the system and inform the customer about the result of the repair and the time for the delivery of the juicer. For simplicity, you will create one email for these purposes.

To create a billable email associated with the case, do the following:

1. While you still viewing the case with the *Request for juicer repair from Storehut* subject on the *Cases* (CR306000) form, open the **Activities** tab.

2. On the table toolbar, click **Add Email**. The *Email Activity* (CR306015) form opens in a pop-up window. Notice that in the **To** box, the system has inserted the contact's name, *Tonya Lawrence*, and in the **Subject** box, the system has inserted the ID and the subject of the case.

3. In the **From** box, select *support@sweetlife.com*.

4. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

```
Dear Tonya,

The juicer JUICER15 has been repaired.

The delivery is scheduled for tomorrow between 2 PM and 4 PM. Please confirm that
the time range is suitable.
```

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

   a. Select the **Internal** check box to hide the email from the Self-Service Portal users.

   b. Select the **Track Time** check box. This causes the system to display additional UI elements on the tab.

   c. Make sure that the **Billable** check box is selected.

     d. Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that you have performed the repair during your working hours.

     e. In the **Time Spent** box, select *02:30*, which means that it took you two and a half hours to repair the juicer. Notice that in the **Billable Time** box, the system has inserted the time that you have specified in the **Time Spent** check box.

     f. In the **Project** box, select *X—Non-Project Code*.

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

7. Click **Send**. The system closes the *Email Activity* (CR306015) form and returns you to the *Cases* form. Notice that a row with the *Email* type has been added to the table on the **Activities** tab of the *Cases* form for the case.

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

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

8. In the **Summary** box, click the link to open the email.

9. On the **Details** tab, in the **Status** box, select *Completed*.

> ℹ️ For simplicity, in this activity, you have changed the status of the email before receiving the confirmation from the customer. (In actual case processing, you would change the status after receiving the confirmation.) You can release a case (which you will do later in this activity) if all the activities associated with the case have the *Completed* status.

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

Step 3: Creating a Billable Activity of the *Appointment* Type Associated with the Case

Suppose that your customer has confirmed the delivery and you need to record the time for the delivery in the system.

To create a billable activity of the *Appointment* type, do the following:

1. While you are still viewing the case with the *Request for juicer repair from Storehut* subject on the *Cases* (CR306000) form, on the table toolbar of the **Activities** tab, click **Add Activity > Add Appointment**. The *Activity* (CR306010) form opens in a pop-up window.

2. In the **Summary** box, type a brief description of the activity: `Delivery of a juicer to Storehut.`

3. Select the **Internal** check box to hide the activity from the Self-Service Portal users.

4. In the **Date** box, specify the current date.

5. In the text editor area, type your comments or any other information related to the appointment, such as `The courier Tim Fincher will deliver the juicer.`

6. Select the **Track Time** check box. This causes the system to display additional UI elements on the tab.

7. In the **Status** box, select *Completed*.

8. Make sure that the **Billable** check box is selected.

9. Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that the juicer will be delivered during working hours.

10. In the **Time Spent** box, select *01:00*, which means that it will take an hour to deliver the juicer. Notice that in the **Billable Time** box, the system has copied the time that you have specified in the **Time Spent** check box.

11. In the **Project** box, select *X—Non-Project Code*.

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

13. Close the form. The system returns you to the *Cases* form. Notice that a row with the *Appointment* type has been added to the table on the **Activities** tab of the *Cases* form for the case.

Step 4: Closing the Case

To close the case for the *STOREHUT* customer, do the following:

1. While you are still viewing the *Request for juicer repair from Storehut* case on the *Cases* (CR306000) form, on the form toolbar, click **Close**.

2. In the **Details** dialog box, which opens, do the following:

    a. In the **Reason** box, select *Resolved*.

    b. Click **OK**. The system closes the dialog box and returns you to the form.

You have closed the case. Now you can bill your customer for the repair of the juicer by releasing the case, which causes the system to create an invoice. Notice that in the Summary area of the *Cases* form, the system has inserted *Closed* in the **Status** box and *Resolved* in the **Reason** box.

Step 5: Releasing the Case

To release the *Request for juicer repair from Storehut* case, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, open the **Activities** tab.

2. In the **Status** column, make sure that all the rows have the *Completed* option.

> ⚠️ You can release a case if all the activities associated with the case have the *Completed* status.

3. On the table toolbar, click **Release**.

    It may take some time for the system to release the case. When the case has been released, on the form toolbar, a green check mark is displayed. In the **Status** box of the Summary area, the system changes the status of the case to *Released*. On the *Invoices and Memos* (AR301000) form, the system creates an invoice associated with the case.

Step 6: Viewing the Case-Based Invoice

To view the invoice associated with the *Request for juicer repair from Storehut* case, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, on the form toolbar, click **Inquiries > View Invoice**.

2. On the **Document Details** tab of the *Invoices and Memos* (AR301000) form, which opens, notice one detail row with the following settings of the invoice:

    - **Inventory ID**: The *TECHNICIAN* labor item

    - **Unit Price**: The rate for the works performed

    - **UOM**: Hours

    - **Quantity**: The number of hours that were spent to resolve the case