



End-User Course: CRM Marketing Operations

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Implementation Consultant

Welcome! We will begin today's session 5 minutes after the hour.

Timing

Day One

Monday August 26, 2019

- 12:00 pm – 2:00 pm (ET)

Day Two

Tuesday August 27, 2019

- 12:00 pm – 2:00 pm (ET)

To Access your Instance of Acumatica:

<https://training.acumatica.com/CRMMarketing/>

- Username and password for the first 100 registered participants have been emailed.
- Using Local Environment, here are the pre requisites
 - Acumatica ERP 2019 R1 Update 3 (19.103.0030) is installed
 - Company with U100 dataset has been installed
- Acumatica mobile app is installed on your device

Agenda – Marketing Operations

Day 1	Day 2
System Email Accounts	Lead Assignment
Leads and Contacts	Activities, Tasks, Emails and Events
Registering Leads	Marketing Lists
Importing Leads	Marketing Campaigns
Validating and Handling Duplicates	Mass Emails

Learning Objectives

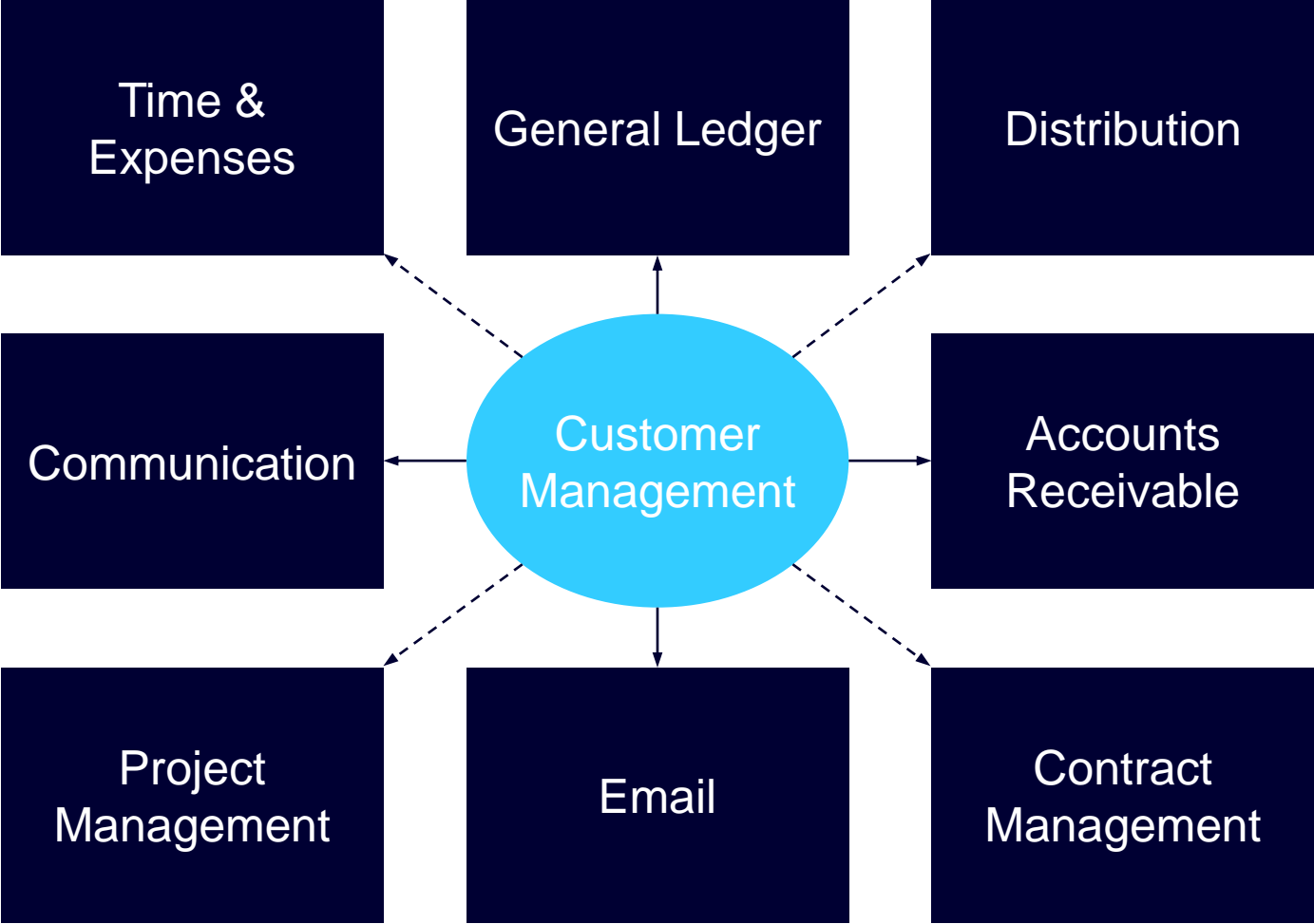
In this training, you will learn how to:

- Manage and Validate Leads
- Understand Concepts of Leads and Contacts in Acumatica
- Use Emails
- Automate Lead Assignments, purging and handling duplicates
- Process Marketing Lists
- Process Marketing Campaigns
- Send Mass Emails

Session Rules

- Feel free to ask **questions** during the session. To do so please “raise your hand” via Ring Central and post your question using the Chat feature of Ring Central.
- Please fill in the evaluation **survey** at the end of the day two session.
- The session will be **recorded** and be posted on Acumatica Open University. The Training team will send a link after the session is published.
- This course should be completed on Acumatica 2019 R1.

Why Acumatica CRM?



Company Story (pg 8)

SweetLife Fruits & Jams

is a mid sized company located in New York City having 3 following branches

1. Sweet Life Office & Wholesale Center – Is a jam factory with a large warehouse where fruits, purchased from wholesale vendors and jam is produced and stored.
2. Retail – A store with a small warehouse and they receive their merchandize from the main warehouse
3. Service Equipment Sales Center – Sells, installs, trains and services juicers sold to its customers

Marketing Activities

1. End customer & Referral Partners are 2 broad customer categories
2. Marketing validates the leads and would like to automatically assign leads to the respective teams based on the above categories
3. Leads are purchased from third parties, phone calls, web inquiry and marketing campaigns

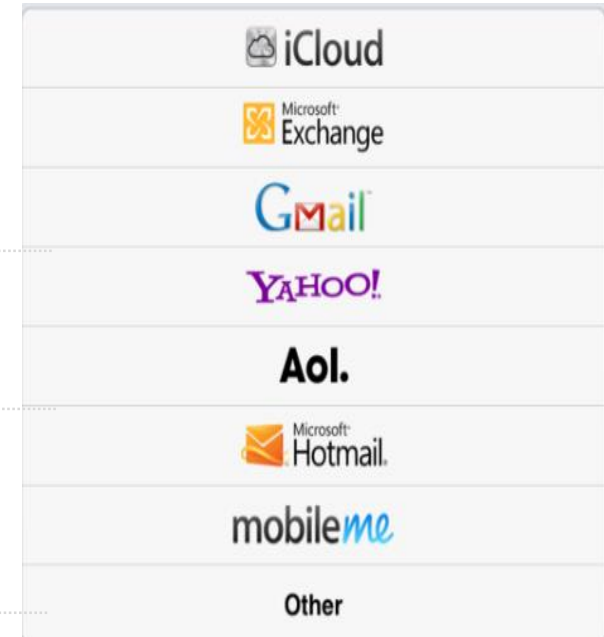
Marketing Flow

CRM FLOW



Lesson 1: The System Email Account

- 1 Configure a new system email account
- 2 Setup default email account
- 3 Create a Send and Receive Email Schedule



Lesson 1 : Exercise

- See page 11

Leads & Contacts

- An Unconfirmed Contact is a Lead.
- Lead is converted into a contact after verification.
- System allows registering a lead or a contact in the system.
 - A Purchased List from a third party would be imported as a Lead while an individual met at a trade show can be registered as a Contact.

Registering a Lead

- 1 Type into Leads screen
- 2 Acumatica Add In for Outlook
- 3 Mobile App
- 4 Importing Leads
- 5 Incoming mail processing

Lead and Contact Status

- 1 New – an Unassigned Lead
- 2 Open – Assigned, Validation in process
- 3 Lost - Disqualified Lead
- 4 Converted – Interested, converted into a contact



Lesson 2 through 4: Registering Leads

See Page 17 - 25

Duplicate Validation

Duplicate Validation Process can be defined for 3 different entities

1. Leads are validated against other leads, contacts and business accounts
2. Contacts are validated against leads, other contacts and business accounts
3. Business Accounts are validated against other business accounts

Configuring and Processing Duplicates

1. Setting up duplicate thresholds
2. Calculating Grams
3. Processing & Identifying Duplicates
4. Merging Records
5. Purging Duplicates

	A	B	C	D
1	Sierra	Tango	Charlie	
2	Kilo	Bravo	Yankee	
3	Golf	Mike	Delta	
4	Juliet	Alpha	Foxtrot	
5	Papa	X-ray	November	
6	Zulu	Sierra	Whiskey	
7	Romeo	Echo	Quebec	
8	India	Oscar	Delta	
9	Sierra	Lima	Uniform	
10	Hotel	Juliet	Victor	
11				

LEAD AND CONTACT VALIDATION RULES		
* Matching Field	Score Weight	Transformation Rule
> Email	1.5000	None
First Name	1.0000	None
Company Name	1.5000	Split Words
Last Name	2.0000	None
Phone 1	0.5000	None
Job Title	1.0000	None
Web	0.5000	Domain Name

Lesson 5: Validation of Leads for Duplicates

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Welcome to Day 2! We will begin today's session 5 minutes after the hour.

Day 1 Review

Review of Day 1

- System Email Account
- Lead and Contacts
- Registering Leads
- Importing Leads
- Validate and Handling Duplicates

Day 2 Agenda

- Lead Assignments
- Communication and Activities
- Assigning Opportunities to Owners
- Marketing Lists
- Marketing Campaigns
- Mass Emails

Assignment Rules & Maps

Automates the process of assigning multiple leads, opportunities, contacts to Employees or workgroups by predefined set of rules. The setup involves the following steps

1. Company Tree and Workgroups
 - Build the Organization Hierarchy
 - Define users within a workgroup/teams
2. Assignment Rules
 - Setting up rules for assignment based on multiple parameters
 - Sequentially applies the rules to each record
3. Processing the assignment rules
 - Scheduled to run automatically or manual batch process
4. Send notifications for the assignment
 - Send email to respective owner when new leads/contacts are assigned



Lesson 6: Assignment of Leads to Owners

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Lesson 7: Communication and Activities

- 1 Activities
- 2 Time Reporting
- 3 Emails
- 4 Tasks
- 5 Events



Acumatica helps maintain all communication history for a lead/contact or a business account in one central location.

Activities can be tracked at all stages and allows viewing the history from various data entry forms

Lesson 7 through 10 : Exercise

- See page 38 - 45

Lesson 11: Marketing Lists

Allows creation of Static or Dynamic List of recipients

1. Static List

- Add / Remove members manually
- Use an excel upload
- Generic Inquiry can be used for generating an initial list
- Members can be added from a another marketing list
- Example – Company Newsletters

2. Dynamic List

- Members are added and removed based on the selection criteria
- List can be generated by selection criteria as well as Generic Inquiry
- Example - Notifying buyers of a particular item or an item class about an upcoming sale is a good example.

Lesson 11 : Exercise

- See page 48

Lesson 12: Marketing Campaigns

Specific set of marketing activities that allows for gathering statistics to determine the results against the core objectives for such a campaign

- Determine the objectives of the campaign
- Generate a list of members as target audience
- Create a message via email or through other platforms
- Track responses, leads and opportunities
- Use Project Accounting to track expenses
- Gather actual statistical information to determine the results



Lesson 12: Exercise

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Lesson 13: Mass Emails - Exercise

- See page 56



Thank you!

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<https://www.surveymonkey.com/r/onlinesessions2019>



Please fill out your survey!

Survey can be found on the Home page of the instance you have been provided. To return to the Home page, click the logo on the top left side of your Acumatica site.