



End User Training: CRM Sales Operations

Jessica Gadbois

Partner Enablement Manager

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

Timing

Day One

Monday July 8, 2019

- 12:00 pm – 2:00 pm (ET)

Day Two

Tuesday July 9, 2019

- 12:00 pm – 2:00 pm (ET)

To Access your Instance of Acumatica:

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

- Please select from the drop down and use **ONLY** your reserved tenant for this course.

Agenda

- System Email Account
- Lead Qualification
- Activities
- Tasks
- Emails
- Events
- Opportunities
- Assignment Rules and Maps
- Sales Quotes
- Opp-Based Sales Orders
- Opp-Based Invoices
- Marketing Campaigns
- Promo Campaigns

Format will be to discuss each topic briefly. I will then take you through the exercises while you follow along on your cloud instance.

** Time Permitting

Learning Objectives

By the end of this course you will learn:

- A set of lessons that illustrate the processes of customer relationship management (CRM) in the sales department of a midsize company.
- What is meant when we talk about a fully integrated customer relationship management.
- Terminology commonly used when working with customer relationship management solutions.
- How to automate sales operations.
- How to track and qualify leads.
- How to create track and manage opportunities.
- How to utilize activity management to log interactions with customers.
- How to create sales quotes.
- How to prepare and execute promotional campaigns.

Session Information

- 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.

Company Story (pg 8)

SweetLife Fruits & Jams

- Midsize company in New York City
- 3 branches – wholesale, retail and service
- Local and international customers – 2 types
 - End customers
 - Referral partners
- Potential customers of each type should be analyzed and processed differently
- Leads come from purchased lists, direct phone calls and emails attracted by marketing campaigns or referrals, and online forms

Sales Automation in Acumatica ERP

Acumatica ERP provides customer relationship management (CRM) functionality that is tightly connected with finance, content management, and communication management.

By using this functionality, your sales personnel can perform the following tasks:

- Quickly convert leads to confirmed contacts, prospects, or opportunities
- Track activities related to leads, contacts, prospects, and opportunities
- Classify opportunities by using classes and attributes
- Assign opportunities to appropriate sales persons

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Sales Automation in Acumatica ERP (continued)

- Prepare sales quotes
- Update quotes while negotiating pricing and discounts
- Convert contacts to prospect business accounts that can be converted to customers
- Create sales orders and invoices based on opportunities
- Prepare and execute promotional campaigns
- Estimate future revenue for each financial period

CRM Flow

CRM FLOW



User Quick Tip: Universal Search



Lesson One: The System Email Account

In this lesson you will learn how to configure a system email account and set up a schedule for periodical sending and receiving of emails.

Automation notifications can be used so that email notifications can be sent by the system and received by an employee when he or she is assigned a record or document.

Note that you need to have an Outlook.com account (either personal or created specifically for training purposes), which will be set up as the default system email account in Acumatica ERP.

Process overview: On the **System Email Accounts** form, you register and set up a new system email account. On the **Email Preferences** form, you specify the registered email account as the default system account. On the **Automation Schedules** form, you configure a schedule for periodical runs of the *Send and Receive Email* process.

Lesson One Exercise

- See page 11

Lesson Two: Lead Qualification

CRM FLOW



Lesson Two: Lead Qualification

In this lesson you will learn how to perform the basic procedures of lead qualification, such as converting leads to contacts and creating lead-based prospects and lead-based opportunities.

This exercise will demonstrate how to manage different types of leads and qualify them toward becoming contacts and customers.

Use Attributes to indicate information like ORGSIZE and INTEREST

Understand the differences between Lead statuses

Create lead-based prospects and opportunities

Convert prospects to customers

Lesson Two Exercise

- See page 14

Communication and Activities Overview

- To keep track of communication activities in Acumatica ERP, users can create:
 - Tasks
 - Events
 - Emails
 - Notes
 - Chats
 - Phone Calls
- An activity is something you do that relates to an entity (for instance, a lead) with which the activity record becomes associated in the system.
- Activities associated with the specific entity being viewed are shown on the **Activities** tab of the form.
- To enable time reporting for activities, you need to enable the *Time Reporting on Activity* feature on the Enable/Disable Features form.

Lesson Three: Activities

CRM FLOW



Lesson Three: Activities

In this lesson, you will learn how to create an activity of a particular type and associate it with an existing opportunity.

You will also learn how you can report the time spent on activities.

Process overview: Open an existing opportunity, and on the **Activities** tab, add an appointment that will be associated with the opportunity.

Enter your comments about the appointment to store the appointment history.

Specify the time spent on the meeting and complete the activity.

Lesson Four: Tasks

CRM FLOW



Lesson Four: Tasks

In this lesson, you will learn how to create a task associated with an existing opportunity.

You will also learn how to assign a task to an owner and how to configure a reminder for a task.

Process Overview: On the **Opportunities** form, you open an opportunity and then, on the **Activities** tab, add a *task* that will be associated with the opportunity.

Enter a summary, start/due date, owner, and reminder for the task and save & close.

As a result, a row with the *Task* type is added to the table on the Activities tab of the Opportunities form.

Lesson Four Exercise

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Lesson Five: Emails

In this lesson, you will learn how to create and send emails by using Acumatica ERP.

To keep track of all communication that is related to a particular opportunity, register email activities in the system and link them to an opportunity.

Process Overview: On the **Opportunities** form, you select an opportunity and then, on the **Activities** tab, add an *email* associated with this opportunity.

- The default system email address is specified in the **From** box
- In the **To** box, the email address of the contact which is associated with the opportunity is specified
- Enter a subject, message and click Send

As a result, a row with the *Email* type is added to the table on the Activities tab of the Leads form.

The actual email is generated by the system and will be sent automatically the next time the *Send and Receive Email* schedule is executed.

Lesson Five Exercise

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Lesson Six: Events

In this lesson, you will learn how to create an event and associate it with a particular opportunity.

You will learn how you can schedule the time of the occurrence of the event and its duration.

Also, you will learn how you can invite attendees to the event.

Process Overview: On the **Opportunities** form, you open an opportunity and then, on the **Activities** tab, add an event that will be associated with the opportunity.

By using the **Attendees** tab on the *Event* form, you add the employees that you want to invite to the event.

Specify a summary, location, start/end time and click **Invite All**.

As a result, invitations to the event are sent by email to the listed employees.

Lesson Six Exercise

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End User Training: CRM Sales Operations

Jessica Gadbois

Partner Enablement Manager

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

Day 1 Review

Review of Day 1

CRM FLOW



Review of Day 1

- System Email Account
- Lead Qualification
- Activities
- Tasks
- Emails
- Events

Day 2 Agenda

- Configuration of Opportunity Classes
- Opportunities
- Assigning Opportunities to Owners
- Sales Quotes
- Opportunity-Based Sales Orders
- Opportunity-Based Invoices
- Promotional Campaigns

Opportunity Classes and Opportunity Stages Overview

- When an opportunity is processed by a salesperson, it progresses through various stages.
- At any particular stage, there is a particular probability, however low, that the sale can be successfully closed. By having probabilities assigned to the stages of opportunities, you can estimate future sales revenue at any time. The accuracy of revenue estimation heavily depends on the correct identification of the opportunity stage and on the accuracy of the related probability.
- An administrator uses the Stages tab of the Opportunity Classes form to set up opportunity stages and their probabilities. At least one stage must be active for each opportunity class.
- The system offers a predefined list of opportunity stages, but this list seldom reflects the set of stages used in a company. To reflect the sales process established in the company, an administrator can modify the list by adding new stages or removing unnecessary ones, which will affect all existing opportunity classes.

Lesson Seven: Configuration of Opportunity Classes

CRM FLOW



Lesson Seven: Configuration of Opportunity Classes

In this lesson, you will learn how to create an opportunity class.

Also, you will learn how to define opportunity stages and their probabilities for an opportunity class.

Process Overview: You use the **Opportunity Classes** form to create two opportunity classes: one for *direct sales*, and the other for *partner sales*. On the **Stages** tab of this form, you define opportunity stages and their probabilities for each class.

Lesson Seven Exercise

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Lesson Eight: Opportunities

CRM FLOW



Lesson Eight: Opportunities

In this lesson, you will learn how to create an opportunity through the web interface of Acumatica ERP.

Process Overview: Create an opportunity on the **Opportunities** form and then, if needed, select proper values for the INTEREST attribute on the **Attributes** tab.

Enter opportunity class, estimation, subject and details of the opportunity.

Lesson Eight Exercise

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Assignment Rules and Assignment Maps Overview

- Acumatica ERP gives you the ability to distribute the workload among employees.
- You can use assignment maps to assign records, such as opportunities, to the appropriate users.
- 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. The set of conditions used in the specified rules should be complete so that no record is left unassigned.
- If conditions allow the same records to be assigned to two or more groups, all assignments will be performed in the group that is positioned higher than the other groups in the assignment map, and the records would never reach the other groups.
- A workgroup includes members who are employees of the company. Acumatica ERP places no restrictions on the number of group members or the number of groups a user may belong to. A group may include employees with different positions and from different departments. An employee may be a member of more than one workgroup if he or she participates in multiple workflows.

Lesson Nine: Assignment of Opportunities to Owners

CRM FLOW



Lesson Nine: Assignment of Opportunities to Owners

In this lesson, you will learn how to create an assignment map with specific rules for assigning opportunities to owners.

You will learn how to use an assignment map to mass-assign opportunities to owners.

Also, you will learn how to set up email notifications so that an owner, when assigned to an opportunity, will receive a notification by email.

To automatically assign opportunities to their proper owners, use assignment maps and the mass assignment functionality of Acumatica ERP.

Process Overview: You use the **Assignment Maps** form to create an opportunity assignment map, and then you specify this map as the default opportunity assignment map on the **Customer Management Preferences** form. Then on the **Automation Notifications** form, you set up email notifications and configure a schedule for the periodic sending of notifications. On the **Assign Opportunities** form, you run the process of automatically assigning opportunities to owners in accordance with the rules specified in the opportunity assignment map

Lesson Nine Exercise

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Quotes Overview

Acumatica ERP supports quotes of two types: **sales quotes** and **project quotes**.

A **sales quote** represents a formal offer made to a particular customer based on an opportunity; the sales quote includes a list of products offered at specific prices. For one opportunity, users can create any number of quotes, each of which can be printed or emailed to the specified customer for review. When the customer accepts the offer, the user can create a sales order and then an invoice based on the quote.

A **project quote** is used to estimate a potential project and send a proposal to the customer before a project is created in the system for billing and accounting of revenues and costs. A project quote can be created based on an opportunity. Each modification of a project quote can be printed and sent to the customer for review, and you can modify the quote as many times as is necessary until an agreement is reached. After the customer agrees to the terms of the quote, you can convert the winning quote to a project.

Lesson Ten: Sales Quotes

In this lesson, you will learn how to prepare a sales quote for an opportunity and how to send it to the customer for review.

Also, you will learn how to use the primary quote if you have multiple quotes associated with one opportunity.

Process Overview: Use the **Opportunities** form to create a sales quote based on the items listed on the *Document Details* tab.

Lesson Ten Exercise

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Lesson Eleven: Opportunity-Based Sales Orders

In this lesson, you will learn how to create a sales order based on an opportunity.

After negotiation is complete, mark the corresponding opportunity as successfully closed (that is, won) and create a sales order based on the opportunity.

Process Overview: Use the **Opportunities** form to mark a successfully closed opportunity as Won and then create a sales order by clicking the *Create Sales Order* menu action on the Actions menu on the form toolbar.

Lesson Eleven Exercise

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Lesson Twelve: Opportunity-Based Invoices

In this lesson, you will learn how to create an invoice based on an opportunity.

After negotiation for training/services is complete, mark the corresponding opportunity as successfully closed (that is, won) and create an invoice based on the opportunity.

Process Overview: Use the **Opportunities** form to mark a successfully closed opportunity as Won and then create a sales order by clicking the *Create Invoice* menu action on the Actions menu on the form toolbar.

Lesson Twelve Exercise

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Marketing Campaigns Overview

- A marketing campaign is a specific set of marketing activities aimed at selected contacts to achieve a particular marketing goal, such as promoting products and services, stimulating demand, boosting name recognition, or generating revenue
- Before you launch a marketing campaign, you should do the following preparatory work:
 - Define campaign classes to set up the types of campaigns your company uses; each campaign class may have a list of attributes that may be used for detailed reporting.
 - Prepare a list of campaign members.
 - Create a campaign and specify necessary properties, such as the planned budget and the return you expect to receive as a result of the campaign. This information may be useful when you analyze campaign results.
- As a marketing campaign progresses through stages, you can associate various activities with it, create related leads and opportunities, link sales and purchase documents to the campaign, and associate the campaign with projects

Lesson Thirteen: Promo Campaigns

In this lesson, you will learn how to prepare and execute a promotional campaign by using Acumatica ERP.

Process Overview: On the **Marketing Campaigns** form, prepare a campaign for promotional mass mailing and add members to the campaign. As the campaign comes to the completion, you mark it as *executed* and then, on the Campaign Details tab, review the campaign statistics, if needed.

Lesson Thirteen Exercise

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Thank you!

Jessica Gadbois
Partner Enablement Manager



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.