

End-User Course

CRM Marketing Operations

Training Guide

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Software Version - 2019 R1

Introduction

This course provides a set of lessons that illustrate the processes of customer relationship management in the marketing department of a midsize company. The course consists of lessons, each of which provides an overview of the relevant features that have been enabled and the configuration settings that have been specified in the system. Each lesson also provides a story describing a particular user scenario and instructions that guide you through a process in Acumatica ERP. All lessons are independent and can be completed in any order.

In the course, you will learn about how to perform basic marketing operations in Acumatica ERP. You will learn to register leads in the system and to use the tools provided by Acumatica ERP to automate this process for large numbers of new leads that originate from various sources. You will learn how to communicate with leads and potential customers through Acumatica ERP and log and track various activities, such as phone calls, emails, and events. You will learn how you can use the Acumatica add-in for Outlook for easy processing of leads, contacts, and emails right from your mailbox. Also, you will learn how to use assignment maps for automatic assignment of records to employees for processing. Finally, you will learn how to prepare static and dynamic marketing lists, campaigns, and mass mailings.

The course is designed to be completed on Acumatica ERP 2019 R1. For educational purposes of this course, you use Acumatica ERP under the trial license that doesn't require activation and provides all available features. For production, you have to activate the purchased license; each particular feature may be subject to additional licensing; please consult the Acumatica ERP sales policy for details.

How to Use This Course

This end-user course provides a set of lessons that illustrate order management processes in a midsize company. The course should be completed on Acumatica ERP 2019 R1. To complete the course, ask your system administrator to deploy an instance of Acumatica ERP for training and to create a tenant and preload the *U100* data set to it; this data set provides the pre-configured settings and entities you will need as you complete the course. (You can find detailed instructions on creating a tenant below.)

What Is in a Guide?

The guide includes the *Company Story* topic, lessons, concept topics related to these lessons, and the *Additional References* topic. *Company Story* explains the organizational structure of the company preconfigured in the *U100* dataset, as well as the company's business processes and requirements. Concept topics provide general overviews of the processes that are performed in Acumatica ERP. Each of the lessons of the course is dedicated to a particular user scenario and consists of processing steps that you complete.

What Is in a Lesson?

Each lesson provides a story describing a particular user scenario and an overview of the relevant features that have been enabled in the system; configuration settings that are related to the described scenario are also listed. The lesson provides a brief overview of the process that should be performed to complete the described scenario, and instructions that guide you through the process in Acumatica ERP. At the end of the lesson topics, you can find links to detailed information about the forms used in the lesson.



The lessons are independent and can be completed in any order.

What Are the Documentation Resources?

All the links listed in the *Forms Used* sections of individual lessons refer to the form documentation available on the <https://help.acumatica.com/> website. The *Additional References* topic provides links to Acumatica ERP Help Portal, where you can find additional information on concepts and procedures that are included in this course. Complete documentation, which includes concept topics and form reference topics, is also included in the Acumatica ERP instance, and you can find these topics under the **Help** menu.

How to Create a Tenant with the Needed Data

As mentioned, you should ask your system administrator to first deploy an instance of Acumatica ERP for training. The administrator should then add a tenant with the *U100* data to this Acumatica ERP instance by performing the following instructions:

1. Open the Acumatica ERP Configuration Wizard, and click **Perform Application Maintenance**.
2. On the **Application Maintenance** page of the wizard, click the **Tenant Maintenance** button.
3. In the **SQL Server Authentication** dialog box, which appears, specify the credentials for connecting to the database server, and click **OK**. The **Company Setup** page opens.
4. To create the new tenant, click **New**, and in the **Insert Data** column, select the *U100* data to be preloaded to the tenant.
5. Click **Next**, and on the **Confirm Configuration** page, click **Finish**.

The system adds the new tenant to the Acumatica ERP instance and preloads the selected data. In the first processing step of each lesson, you can find the user credentials to be used for sign-in.

- 6.** Publish the customization projects required for the user to complete Lesson 4 and Lesson 5, as described in the next section.

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 Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where fruit (purchased from wholesale vendors) and the produced jam are stored.
- 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 sells juicers, installs juicers, trains customers' employees to operate juicers, and provides juicer servicing.

Operational Activity

The company has been operating starting in the *01-2018* financial period. In November 2018, 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 *01-2019*.

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 for sale from a large juicer vendor and either purchases the installation service 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 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, small 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 sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle or through USPS, the third-party carrier that provides delivery nationwide and to some customers outside the United States. Customers can pay for order by cash, check, or credit card.

Customer Relationship Management

The company needs to handle a large number of customers, both current and potential, to maximize its sales opportunities. The customers of the company can be divided into the following two types:

- End customers: Organizations that purchase goods or services, or both, from the company
- Referral partners: Partner organizations that endorse the goods and services of the company

Potential customers of each of these types should be analyzed and processed differently, in accordance with the qualification process adopted by the company.

In its pursuit of new potential customers, the marketing department of the company generates a host of leads from various sources: It purchases lists of leads from third parties; it receives direct phone calls and emails from leads attracted by marketing campaigns or referrals; and the company's website invites any user who is interested in the offered services to fill out an online form, which results in yet more leads. Thus, organizing information meaningfully is among the department's highest priorities.

The marketing department also needs to facilitate the process of assigning leads to sales personnel for qualification.

The sales department of the company aims to create as many opportunities as possible and then bring these opportunities to actual sales. To increase repeated sales and to attract new leads, the company runs frequent marketing campaigns and sends company newsletters and special offers targeted at specific audiences.

Integrated Marketing Solution

The *Customer Management* feature in Acumatica ERP provides the customer relationship management (CRM) functionality that is tightly connected with finance, content management, and communication management. By using this functionality, your marketing personnel can perform the following tasks:

- Aggregate leads from your website, purchased lists, advertisements, direct mail, trade shows, and other sources
- Find and merge duplicates automatically
- Automatically assign leads for qualification to appropriate employees by using assignment maps
- Maintain a complete history of communication to eliminate confusion and improve conversion rates
- Keep track of important tasks and activities by using automatic notifications and reminders
- Classify leads and contacts in the most meaningful manner by using classes and attributes
- Collect information for different lead classes and custom-defined attributes to effectively target market segments
- Integrate marketing activities with billing and financial data to determine campaign response and profitability
- Create email templates to ensure that newsletters, email campaigns, and direct communications have consistent branding and messaging
- Send monthly newsletters, promotions, and other communication to specific lists
- Create and maintain marketing lists by applying specific criteria to existing contact lists or combining groups of lists
- Customize default dashboards for each marketing manager to match their individual needs

Lesson 1: 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 emails.

Story

Bill Owen, the marketing manager in SweetLife, needs to enable the automatic notification functionality 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.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Scheduled Processing* in the *Monitoring & Automation* group of features: Gives you the ability to create schedules for the automatic processing of documents

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 (SM204002) form, you register and set up a new system email account. On the Email Preferences (SM204001) form, you specify the registered email account as the default system account. On the Automation Schedules (SM205020) form, you configure a schedule for periodical runs of the *Send and Receive Email* process.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.

Step 2: Creating a New Email Account

On the System Email Accounts (SM204002) form, do the following:

1. On the form toolbar, click **Add New Record**.
2. In the **Email Account ID** box, type `Admin`.
3. In the **Email Address** and **Reply Address** boxes, type the name of your Outlook.com account you have defined (for example, `sample.name@outlook.com`).
4. In the **Sender Display Name** box, select *Set to Email Account Display Name*.
5. In the **Email Account Display Name** box, type the name of the email account (for example, `Administrator`). This name will be displayed in the sender information in the header of each email sent from the system email account.
6. On the **Servers** tab, specify the following settings:
 - **Incoming Mail Protocol:** `Pop3`
 - **Outgoing Mail Server:** `smtp-mail.outlook.com`

- **Group Mails:** 0
 - **Username:** The name of your Outlook.com account (for example, `sample.name@outlook.com`)
 - **Password:** The password for your Outlook.com account
7. On the **Advanced Settings** tab, specify the following settings:
- **My outgoing server requires authentication:** Selected
 - **Log on using:** Selected
 - **Username:** The name of your Outlook.com account
 - **Password:** The password to your Outlook.com account
 - **My outgoing server validates From field:** Selected
 - **Incoming server port (POP3/IMAP):** 993
 - **Incoming server requires encrypted connection (SSL):** Selected
 - **Outgoing server port (SMTP):** 587
 - **Outgoing server encrypted connection:** *TLS*

For all other settings on this tab, leave the default values.

8. On the form toolbar, click **Save**, and then click **Test** to test your email account settings. When the process completes successfully, a green check mark appears next to the **Actions** menu.

Step 3: Setting Up the Default Email Account

On the Email Preferences (SM204001) form, do the following:

1. In the **Default Email Account** box, select your Outlook.com email address.
2. On the form toolbar, click **Save** to save your changes.

Now your email account will be used as the default system account. All emails sent on behalf of Acumatica ERP will be sent from this address.

Step 4: Creating a Schedule for Sending and Receiving Email

To schedule the process of sending and receiving emails to run at the interval you specify (for instance, every five minutes), do the following:

1. Open the Send and Receive Email (SM507010) form.
2. In the **Action** box, select *Send/Receive All*.
3. On the form toolbar, click **Schedules > Add**.
The Automation Schedules (SM205020) form opens in a pop-up window.
4. In the Summary area of this form, in the **Description** box, type `Send and Receive Email Schedule`.
For all other settings in this area, leave the default values.
5. On the **Details** tab, select the **No Execution Limit** check box.
For all other settings on this tab, leave the default values.
6. On the **Schedule** tab, in the **Every** box in the **Execution Time** section, specify the time interval at which emails are to be sent and received (for instance, `00:05`).

For all other settings on this tab, leave the default values.

7. On the **Filter Values** tab, make sure that a row with the following settings is added to the table:
 - **Active:** Selected
 - **Field Name:** *Action*
 - **Relative:** Cleared
 - **Value:** *Send/Receive All*
 - **Ignore Error:** Cleared
8. On the form toolbar, click **Save & Close** to apply these schedule settings.

Forms Used

In this lesson, you have used the following forms:

[System Email Accounts](#) (SM204002)

[Email Preferences](#) (SM204001)

[Send and Receive Email](#) (SM507010)

[Automation Schedules](#) (SM205020)

Leads and Contacts in Acumatica ERP

In Acumatica ERP, a lead represents an unconfirmed contact that may become a potential customer. A contact may be regarded as a lead with confirmed contact information.

Leads are usually acquired through multiple sources, such as purchased lists, lists of web contacts, and phone inquiries. These newly generated leads look like a large number of unsorted records that need to be put in order and classified before being assigned to sales people for qualification. However, you first have to register all new leads in the system.

Registering Leads in Acumatica ERP

In Acumatica ERP, you can register leads in any of the following ways:

- Entering leads manually one at a time on the Leads (CR301000) form
- Importing lists of leads (for instance, purchased lists) by using import scenarios on the Import by Scenario (SM206036) form
- Importing leads automatically by enabling integration with web services on the Web Services (SM207040) form
- Creating leads automatically by activating the functionality of incoming mail processing on the System Email Accounts (SM204002) form

Validating Leads and Contacts for Duplicates

The number of records that your company maintains can be quite large, and some of these records are probably duplicates. The probability of duplicates significantly increases each time that you add a large batch of new records—for example, when you import a newly purchased list of leads.

In Acumatica ERP, you can validate records for duplicates. The validation process consists of the following steps:

- Leads are validated against other leads, contacts, and business accounts.
- Contacts are validated against leads, other contacts, and business accounts.
- Business accounts are validated against other business accounts.

Before you can start searching for duplicates, the following preparatory steps need to be taken:

1. On the Enable/Disable Features (CS100000) form, the *Lead/Contact Duplicate Validation* feature should be enabled.
2. On the **Duplicate Validation Settings** tab of the Customer Management Preferences (CR101000) form, validation settings should be specified.

Default validation rules are defined for each record type. Consider carefully which settings you need to adjust and why; you may lose important data if you use unbalanced values.

3. Grams should be calculated on the Calculate Grams (CR503400) form.

Grams are used for the calculation of validation scores. You cannot use the duplicate validation feature if you have not calculated grams for all records of the type that you want to validate.

There are two ways that the validation process can be performed:

- By validating individual records
- By validating records in batches

To validate leads and contacts in batches, you can use the Validate Leads and Contacts (CR503410) form, where you can validate either new records only (that is, the records with the *New* status) or all listed records (which may be a time-consuming process if a very large number of records are involved).

As a result of validation, each record is marked as either *Validated* or *Possible Duplicate*. If possible duplicates have been found for a record, the **Duplicates** tab appears on the corresponding data entry form. On this tab, you can merge duplicates into one record by using the merge wizard. After you have resolved conflicts between the matching fields and merged the records, the duplicates are closed.

Using Classes and Attributes for Classification

In Acumatica ERP, you use classes and attributes for flexible classification of leads, opportunities, customers, and cases with respect to your business. A class is a group of records, such as leads, opportunities, contacts, or cases, that shares at least one common characteristic. An attribute is a quality or characteristic (for instance, age or industry) that gives your company specific information that is helpful for its business. For each class, you can define a list of attributes to gather particular class-specific information about these leads, contacts, opportunities, business accounts (that is, customers), cases, or marketing campaigns.

The Leads (CR301000), Contacts (CR302000), Business Accounts (CR303000), Opportunities (CR304000), Cases (CR306000), and Marketing Campaigns (CR202000) forms have tabs reserved for attributes. When a user is creating a new entity and selects a class, its attributes appear on the respective tab. To keep classification meaningful, users must always enter proper values for attributes, both for those marked as required and for optional ones.

A user can deactivate an obsolete attribute for a particular entity class by clearing the **Active** check box for this attribute on the entity class form. In this case, the deactivated attribute will no longer be displayed for records of the class, but all attribute values that have already been specified for existing records still will be stored in the database. If a user re-activates the attribute, its values will become visible in the system again. However, if it is not necessary to preserve the data related to an obsolete attribute, a user can deactivate the attribute and then delete it by using the Delete Row button on the table toolbar. In this case, the attribute will be permanently deleted from the class and all attribute values will be cleared for the records of the class.

If you specify values for the attributes of a business account and then convert the business account to a customer or vendor account, the resulting account retains these attributes. If the customer or vendor class to which the resulting account belongs also has attributes specified, these attributes are added to the list of attributes of the resulting account.

You can use attributes when creating an assignment map on the Assignment Maps (EP205010) form to specify the criteria for assigning records to the appropriate owners.

Using Lead and Contact Statuses

The status of a lead, which you select in the **Status** box on the Leads (CR301000) form, indicates whether the lead has been just created or already processed in any way.

You can select one of the following statuses:

- *New*: The lead has been created but has not been assigned to anyone yet.
- *Open*: The lead has been assigned to an employee for the qualification process.
- *Suspended*: The lead cannot be contacted or validated at the moment and has thus been suspended, but it has not been disqualified yet.
- *Lost*: The lead has been disqualified.
- *Converted*: The lead has been qualified and converted to a contact. For a lead with this status, all boxes on the entry form are read-only.

A contact does not have any status; it can only be marked *Active*, which indicates that the contact information specified for the record is up-to-date and the record can be selected in a new document.

Inactive contacts are stored in the database for historical purposes but they cannot be selected in new documents or associated with other entities, such as business accounts or opportunities.

Lesson 2: Registration of Leads

In this lesson, you will learn how to enter new leads in Acumatica ERP by using the web interface and the add-in for Outlook.

Story

Bill Owen, the marketing manager in SweetLife, receives phone calls and emails from leads attracted by advertisements or referrals. John Elbow is one of such leads. He is the owner of McMuffin, a bakery that bakes pastry, usually with jam filling. John Elbow calls to offer placing a banner on their website with referral to SweetLife in exchange for a discount that SweetLife will provide when selling jam to them.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Attributes (CS205000) form, the *INTEREST* attribute is configured. The values of this attribute indicate the kinds of products and services that SweetLife can provide.

On the Contact & Lead Classes (CR207000) form, a class for potential end customers (*ENDCUST*) and a class for potential referral partners (*REFPART*) have been added. The *INTEREST* attribute is specified for both classes.

On the Customer Management Preferences (CR101000) form, the *ENDCUST* class is specified as the default lead class.

Process Overview

You create a lead on the Leads (CR301000) form and then, if needed, select proper values for the attributes on the **Attributes** tab.



To open any form in Acumatica ERP, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Registering a Lead

To create a lead through the web interface, do the following:

1. On the form toolbar of the Leads (CR3010PL) form, click **Add New Record**.

The Leads (CR301000) form for data entry opens.

2. In the Summary area, specify the following data:

- **First Name:** John
- **Last Name:** Elbow
- **Company Name:** McMuffin
- **Job Title:** CEO

3. On the **Details** tab, specify the following data:

- **Email:** jelbow@mcmuffin.com
- **Lead Class:** *REFPART*
- **Source:** *Phone Inquiry*

For all other settings on this tab, leave the default values.

4. On the **Attributes** tab, select *Jam* for the *Interested in* attribute.

5. Click **Save** on the form toolbar.

Forms Used

In this lesson, you have used the following forms:

[Leads](#) (CR301000)

Acumatica Mobile App

The Acumatica mobile app is a mobile client of Acumatica ERP that you can use to perform basic operations in Acumatica ERP from your mobile device, including adding contacts and business accounts, handling support cases, creating tasks, and following events. The mobile app connects to your Acumatica ERP instance in real time. Changes made in the mobile app are immediately reflected in Acumatica ERP, and changes made in Acumatica ERP immediately become visible in the mobile app.

The mobile app includes app forms, which are versions of Acumatica ERP forms that have been mapped to be used on mobile devices. On an app form, you can work with documents or other records presented in list view or form view.

In list view, an app form displays a list of documents or records that are filtered by type or by another built-in criterion. You can open any listed document or record for editing in form view by tapping its description. Also, you can initiate the creation of a new document or record by tapping the floating Add Record button. The app opens the new document or record in form view.

In form view, an app form displays all the elements of a particular document or record. If the form in Acumatica ERP that corresponds to the app form has any tabs, they appear in the app form as links to the appropriate information. If the document or record has detail lines, you can view them in list view by tapping the **Details** (or **Document Details**) link, and you can tap any detail to view its element values in form view. A floating Save button is available in form view when you are editing an existing document or record or creating a new one.

The Acumatica mobile app is available for Android and iOS devices.

Lesson 3 (Optional): Registration of Contacts Through the Mobile App

In this lesson, you will learn how to register a contact in the system by using the mobile app.

Story

In addition to the work in the office, Bill Owen, the marketing manager in SweetLife, visits various fairs and trade shows where he makes new business contacts. He uses the Acumatica mobile app to enter collected contact information on the spot.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Contact & Lead Classes (CR207000) form, a class for potential end customers (*ENDCUST*) has been added.

On the Customer Management Preferences (CR101000) form, the *ENDCUST* class is specified as the default contact class.

Process Overview

In the Acumatica mobile app, you use the Contacts app form to enter the information you have collected about a new contact.

Before You Begin

Make sure that the Acumatica mobile application is installed on your mobile device.

The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.

For the mobile app to be able to connect to your Acumatica ERP instance, the instance must be hosted over HTTPS. For more information, see [Setting Up an HTTPS Service in Web Server \(IIS\)](#).

Step 1: Signing In to the Mobile App

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

1. On the mobile device, tap the application icon to launch the app.
2. Enter the URL of your Acumatica ERP instance (for example, <https://my.site.acumatica.com>), and then tap **Next**.
3. Sign in as the marketing manager by using the *owen* user name and the *123* password.

Step 2: Creating a Contact by Using the Mobile App

To quickly register a contact by using the Acumatica mobile app, do the following:

1. On the main menu of the app, tap the **Contacts** icon.
2. On any panel of the Contacts app form, tap the Add Record button.

The app form opens in form view.

3. Specify the following information:
 - **First Name:** Phillip
 - **Last Name:** Anderson
 - **Job Title:** Manager
4. Swipe upward, and tap **Details**. This expands the group of related elements.
5. In the **Contact Class** element, select *ENDCUST*.
6. Swipe upward, tap **CRM** to expand this group of related elements, and then specify *Jelly Monster Inc.* as the **Company**.
7. Swipe upward, and tap **Address**.
8. As the **Country** element, select *US*.
9. Tap the Save button to save the contact.

Import Scenarios

Acumatica ERP provides integration with external data sources and third-party systems through integration services. Integration scenarios, which are a part of Acumatica ERP integration services, are primarily intended for one-time or periodic import or export of data between systems.

Import Scenarios

To upload data to Acumatica ERP, you can use import scenarios, which define the data import instructions for the system.

Import scenarios are created and maintained on the [Import Scenarios](#) (SM206025) form.

An import scenario is a sequence of actions to be executed for a data record as if you are manipulating the record through an Acumatica ERP form. When you enter data into the system manually, you perform a sequence of actions. You open the needed data entry form and start entering data. To add a new record, you use the UI elements one by one—that is, you type text, select values in combo boxes, clear or select check boxes, and click buttons. In the corresponding import scenario, you compose the same sequence of actions, specifying a command for each user action on the form. Because you cannot perform multiple actions simultaneously on the form, the scenario executes commands successively. To construct an import scenario, you reflect the actions you make on the form in the sequence of commands for the scenario.

Data Providers

By using import scenarios, you upload data from an external system or file to Acumatica ERP. Thus, you must define to the system the format of the external system or file. For this purpose, you set up a data provider in the system by using the [Data Providers](#) (SM206015) form. A data provider is an entity that defines the structure of the external data source; Acumatica ERP then uses the data provider to transfer data from the external system or file.

When you're creating an import scenario, you first create the needed data provider, which defines the type and schema of the data source. For example, the type can be an Excel file, and the schema of an Excel data source consists of the names of the spreadsheets that should be used for data import and the list of columns on the spreadsheets. If the external data source has changed (for example, if a new column has been added to an Excel spreadsheet), you have to update the data provider in Acumatica ERP.

After you have prepared the data provider, you define the import scenario, including the scenario mapping. You can construct a scenario for any data entry form. In the scenario, you use internal fields, which are the fields of Acumatica ERP, and external fields, which are defined in the specified data provider. In the scenario, you map internal fields to external fields and specify commands. An integration scenario is specific to the Acumatica ERP form and the external data schema.

After the scenario is ready, you can run the import for the scenario to get the result. You can also schedule scenarios to be run, so that you can import data regularly.

Data Import

You can import data from a third-party application or an external file of a specific type to Acumatica ERP, or you can perform periodic data synchronization—that is, update or delete data in the existing records—with the data of a third-party application.

When you import data from an external file or system, the specified data provider identifies objects in the prepared external data and finds the fields defined in the data schema of the provider. For example, for an Excel source file, objects correspond to sheets, and fields correspond to columns. Then the data provider executes the import operation according to the selected scenario. It copies the data from the

external fields to the specified fields of the Acumatica ERP object. As a result of the import operation, the external data is available in Acumatica ERP.

Regardless of the source from which data originates, the import procedure is always the same: You create an import scenario and then apply it to a particular data file. Acumatica ERP supports import from .xlsx and .csv files. For different lists, you have to use different import scenarios.

The import procedure can be used when a company switches from another application to Acumatica ERP. For instance, lists of leads can be exported from the previously used CRM application and then imported from the resulting files to Acumatica ERP.

Lesson 4: Import of a Purchased List

In this lesson, you will learn how to use an import scenario for importing a purchased list of leads to Acumatica ERP.

Story

SweetLife uses purchased lists as a source of leads. The lists are imported to Acumatica ERP so that all records are stored in a single place, put in order, and classified.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Contact & Lead Classes (CR207000) form, a lead class for imported leads (*IMPORTED*) has been added.

On the Data Providers (SM206015) form, the *Lead Import from Purchased List* data provider has been added and configured.

On the Import Scenarios (SM206025) form, the *Import Leads from Purchased List* import scenario has been configured. This scenario is to be used for the import of leads from purchased lists to Acumatica ERP. The *Lead Import from Purchased List* data provider is used for this import scenario. The imported leads will belong to the *IMPORTED* lead class.

Process Overview

On the Import by Scenario (SM206036) form, you select the *Import Leads from Purchased List* import scenario and then upload the Excel file with the purchased list to the system. After that, you prepare the data so that the system validates the rows of records and then you initiate the import process.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Importing a Purchased List

To import the purchased list of leads, do the following:

1. Open the Import by Scenario (SM206036) form.

2. In the **Name** box, select *Import Leads from Purchased List*.

3. On the form title bar, click **Files**.

The **Files** dialog box opens.

4. In this dialog box, click **Browse**. In the window that opens, find the *PurchasedLeads.xlsx* file, which is a part of additional materials provided for this training, select it for upload, and then click **Upload**.

After the file has been successfully uploaded, close the **Files** dialog box.

5. On the form toolbar, click **Prepare**.

The table on the **Prepared Data** tab becomes populated with the data from the uploaded file, with each row corresponding to a lead.

6. On the form toolbar, click **Import** to initiate the import of the selected records.

A green check mark appears on the form toolbar when the process has completed successfully, and for the imported records, the check boxes in the **Processed** column are selected.

Forms Used

In this lesson, you have used the following forms:

[Import by Scenario](#) (SM206036)

Lesson 5: Validation of Leads for Duplicates

In this lesson, you will learn how to validate a large amount of new leads for possible duplicates.

Story

The marketing department of SweetLife periodically imports large batches of new records from different sources. Some of these records may be duplicates. The imported leads should be validated for duplicates and each pair of possible duplicates should be processed and, if needed, merged into a single record.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.
- *Lead/Contact Duplicate Validation*: Provides the duplicate validation functionality.

In the Summary area of the **Duplicate Validation Settings** tab of the Customer Management Preferences (CR101000) form, the following duplicate validation settings are specified so that the system compares the validation score against the threshold value to determine whether the compared records are possible duplicates.:

- **Lead and Contact Validation Score Threshold**: 5
- **Validate Leads and Contacts for Duplicates on Entry**: Cleared

On the Leads (CR301000) form, a number of unqualified leads have been added to the system.

Process Overview

You start with adding a validation rule to the set of default validation rules on the **Duplicate Validation Settings** tab of the Customer Management Preferences (CR101000) form. Then you calculate grams by using the Calculate Grams (CR503400) form and execute the duplicate validation process on the Validate Leads and Contacts (CR503410) form. Then you review possible duplicates and merge them if needed. In the end, you purge closed duplicates by using the Purge Leads and Contacts (CR508000) form.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Updating the Validation Rules

On the Customer Management Preferences (CR101000) form, do the following to review and modify the duplicate validation settings:

1. Click the **Duplicate Validation Settings** tab.
2. On the **Lead and Contact Validation Rules** tab, review the rules according to which the validation score will be calculated for each validated record, and add a row with the following settings specified:
 - **Matching Field:** *Job Title*
 - **Score Weight:** 1.0000
 - **Transformation Rule:** *None*
3. Click **Save** on the form toolbar.

Step 3: Calculating Grams

On the Calculate Grams (CR503400) form, click **Process All** to calculate grams for all listed records.

Step 4: Validating Leads for Duplicates

To validate leads for duplicates, do the following:

1. Open the Validate Leads and Contacts (CR503410) form.
2. Select the **Validate All Records** option button to check all listed records for possible duplicates.
3. Make sure that the **Close Leads with No Activities** check box is cleared.
4. To initiate the validation process, on the form toolbar, click **Process All**.

Step 5: Viewing Possible Duplicates

To view possible duplicates after the validation process has been completed, do one of the following:

- In the table, click the **Duplicate** column header, and create a filter to view only the records with the *Possible Duplicate* status.
- To see if possible duplicates have been found for a particular lead or contact, find the record you need on the Leads (CR3010PL) form, and open it. See the following step for details on how to see whether possible duplicates have been found.

Step 6: Merging Duplicates

If possible duplicates have been found for a lead record, the **Duplicates** tab appears on the Leads (CR301000) form for this lead. On this tab, you can merge duplicates into one record by using the merge wizard.

For an example of how to merge duplicates, proceed as follows:

1. On the Leads (CR3010PL) form, find the lead with *Jackson, James* in the **Display Name** column, and click it to open it on the Leads (CR301000) form.
2. On the **Duplicates** tab, select the unlabeled check box for the possible duplicate displayed in the table.
3. Click **Merge** on the table toolbar.
The **Please Resolve the Conflicts** dialog box opens.
4. In the dialog box, do the following:
 - a. In the **Target** box, select the record that you want to remain as the original record.

- b. Click **OK**.

As a result, you are redirected back to the Leads (CR301000) form filled in with the data related to the target record. The duplicate record is closed, its status is set to *Lost*, and the reason for this status is set to *Duplicate*.

Step 7: Purging Closed Duplicates

To purge closed duplicate leads so that when sales persons are processing records they won't confuse them with their duplicates, do the following:

1. Open the Purge Leads and Contacts (CR508000) form.
2. In the Summary area, make sure that the **Purge Unconverted Leads that Are Older than x Months** and **Purge Inactive Contacts with No Activities for More than x Months** check boxes are cleared.
3. Select the **Purge Closed Contacts and Leads** check box.
Only leads with the *Lost* status remain listed in the table.
4. On the form toolbar, click **Process All**.

When the processing has completed, all the listed leads have been deleted from the system. Note that if you have a closed lead that has at least one associated activity, this lead is not deleted during the purging process—the system only marks it as inactive.

Forms Used

In this lesson, you have used the following forms:

[Customer Management Preferences](#) (CR101000)

[Calculate Grams](#) (CR503400)

[Validate Leads and Contacts](#) (CR503410)

[Leads](#) (CR301000)

[Purge Leads and Contacts](#) (CR508000)

Assignment Rules and Assignment Maps

Acumatica ERP gives you the ability to distribute the workload among employees. You can use assignment maps to assign records, such as leads, to the appropriate users.

Assignment Rules

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.

Carefully prepared assignment rules give you the ability to distribute leads among workgroups or individual employees in an almost unlimited number of ways, based on particular lead properties or attributes. For example, leads can be distributed by location (for instance, leads with postal codes starting with *94* go to *Workgroup 1*, leads with postal codes starting with *95* go to *Workgroup 2*, and so on), by source, by the first letter of the company name, or by any other property or attribute; they can be distributed by multiple criteria as well.

Company Tree and Workgroups

On the Company Tree (EP204061) form, a company tree is defined, which is a model of your organization's hierarchy that includes temporary and permanent workgroups. The company tree may reflect the administrative hierarchy and include sub-hierarchies of workgroups created within specific branches or departments. The company tree is used for creating assignment rules in assignment maps and for determining the scope of the users who want to view items assigned to them.

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.

You don't necessarily have to create a company tree or, if a company tree has been set up, you don't have to always use workgroups in assignment maps because you can specify particular employees as assignees; however, you can create more efficient assignment rules when using a company tree. For each type of document or record that should be automatically assigned, you create any number of assignment maps that define the rules for such assignment, and then, on the related module's preferences form, you specify which assignment map is to be used during the assignment process.

Automatic Assignment of Records to Owners

Assignment maps are used for assigning business accounts, cases, contacts, email activities, leads, opportunities, purchase receipts, requests, or requisitions to owners for further processing.

By using the **Add Assignment Map** button on the form toolbar of the Assignment and Approval Maps (EP205500) form, you can start creating an assignment map, which opens on the Assignment Maps (EP205010) form.

You can use the Customer Management Preferences (CR101000) form to specify an assignment map for leads, contacts, business accounts, opportunities, or cases.

Users can assign such records as leads, contacts, business accounts, opportunities, and cases in bulk by using the appropriate mass-processing form, such as Assign Leads (CR503010) or Assign Cases (CR503210).

Execution Issues

Any issues that occur during the execution of an assignment map are recorded in the Acumatica ERP trace log. You can open the trace log by clicking **Tools > Trace** on the form title bar.

Notifications

In Acumatica ERP, if the *Change Notifications* feature in the *Monitoring & Automation* group of features is enabled on the Enable/Disable Features (CS100000) form, you can set up email notifications so that if an employee is assigned to a new record, he or she receives a notification by email.

You use the Automation Notifications (SM205040) form to set up email notifications.

Lesson 6: Assignment of Leads to Owners

In this lesson, you will learn how to create an assignment map with specific rules for assigning leads to owners. You will learn how to use an assignment map to mass-assign leads to owners. Also, you will learn how to set up email notifications so that an owner, when assigned to a lead, will receive a notification by email.

Story

In SweetLife, sales employees exhibit various degrees of competence, and each employee is responsible for only a particular area of business. Thus, all leads get sorted by specific criteria, and after that, an appointed employee qualifies (and, if needed, further processes) only those leads that are related to his or her area of knowledge. To automatically assign leads to their proper owners, Bill Owen, the marketing manager in SweetLife, uses assignment maps and the mass assignment functionality of Acumatica ERP.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management
- *Change Notifications* in the *Monitoring & Automation* group of features: Gives you the ability to configure notifications about specific changes in documents
- *Scheduled Processing* in the *Monitoring & Automation* group of features: Gives you the ability to create schedules for the automatic processing of documents

On the Employees (EP203000) form, the *Jack Carrey* and *Archibald Knorr* employees have been created. On the Company Tree (EP204061) form, one of these employees has been added to the *Sales 1* workgroup, and the other to the *Sales 2* workgroup.

On the Leads (CR301000) form, a number of unqualified leads have been added to the system.

Process Overview

You use the Assignment Maps (EP205010) form to create a lead assignment map, and you specify this map as the default lead assignment map on the Customer Management Preferences (CR101000) form. Then on the Automation Notifications (SM205040) form, you set up email notifications and configure a schedule for the periodic sending of notifications. On the Assign Leads (CR503010) form, you run the process of automatically assigning leads to owners in accordance with the rules specified in the lead assignment map.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed,

click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.

3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.
4. Make sure that the default system email account has been configured and a schedule for periodic sending and receiving of emails has been set up. For details, see [Lesson 1: The System Email Account](#).

Step 2: Creating an Assignment Map

To create an assignment map that you will use later to automatically assign leads to salespersons for further processing, do the following:

1. Open the Assignment and Approval Maps (EP205500) form, and click **Add Assignment Map** on the form toolbar.
2. In the Summary area of the Assignment Maps (EP205010) form, which opens, specify the following settings:
 - **Name:** *Lead Assignment Map*
 - **Entity Type:** *Leads*
3. On the toolbar of the **Rules** pane, click **Add Rule**.
4. In the **Description** box on the **Conditions** tab, type *Sales 1*, which is the name of the rule.
5. On the table toolbar, click **Add Row**, and in the row, specify the following settings, which make up the first line of conditions for the first rule:
 - **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Equals*
 - **Value:** *Web*
 - **Operator:** *Or*
6. On the table toolbar, again click **Add Row**, and in the row, specify the following settings, which make up the second line of conditions:
 - **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Equals*
 - **Value:** *Phone Inquiry*
 - **Operator:** *Or*
7. Add another row, and in the row, specify the following settings, which make up the third line of conditions:
 - **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Equals*
 - **Value:** *Referral*
 - **Operator:** *Or*

8. Add one more row, and in the row, specify the following settings, which make up the fourth line of conditions:
- **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Equals*
 - **Value:** *Other*
- These four rows establish the condition, which is the lead source being equal to *Web, Phone Inquiry, Referral, or Other*.
9. On the **Rule Actions** tab, specify the following settings:
- **Assign Ownership To:** *Employee*
 - **Workgroup:** *Sales Assignments>Sales 1*
 - **Employee:** *Jack Carrey*
10. On the toolbar of the **Rules** pane, click **Add Rule** to add another rule.
11. In the **Description** box on the **Conditions** tab, type *Sales 2*, which is the name of the second rule.
12. On the table toolbar, click **Add Row**, and in the row, specify the following settings, which make up the first line of conditions for the second rule:
- **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Equals*
 - **Value:** *Purchased List*
 - **Operator:** *Or*
13. On the table toolbar, again click **Add Row**, and in the row, specify the following settings, which make up the second line of conditions:
- **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Is Null*
14. On the **Rule Actions** tab, specify the following settings:
- **Assign Ownership To:** *Employee*
 - **Workgroup:** *Sales Assignments>Sales 2*
 - **Employee:** *Archibald Knorr*
15. On the form toolbar, click **Save**.
16. Open the Customer Management Preferences (CR101000) form, and do the following:
- a. On the **General Settings** tab, in the **Assignment Settings** section, select the created map in the **Lead Assignment Map** box.
 - b. On the form toolbar, click **Save**.

The system will now use this map for the automatic assignment of leads to owners.

Step 3: Setting Up Email Notifications

To set up email notifications that employees will receive when they are assigned new leads, do the following:

1. Open the Automation Notifications (SM205040) form.
2. In the Summary area of the form, specify the following settings:
 - **Screen ID:** *Leads (Organization > Customer Management > Work Area > Enter)*
 - **Description:** *New Lead Owner Assigned*
 - **Active:** Selected
 - **Public:** Cleared
 - **Subject:** *You have been assigned to a new lead*
 - **Data Source:** *None*
3. On the **Message** tab, in the text area, type the following message:


```
Dear ((Lead.OwnerID)),
You have been assigned to a new lead: ((Lead.DisplayName)),
with a lead source of ((Lead.Source)).
Please start processing this lead.
Sincerely yours,
[your name]
```

The owner will see this message in the body of the notification email, with the appropriate data automatically specified in place of the placeholders.
4. On the **Conditions** tab, add a row with the following settings:
 - **Active:** Selected
 - **Field Name:** *Owner*
 - **Condition:** *Is Not Null*
5. On the **Addresses** tab, edit the existing row to have the following settings:
 - **Active:** Selected
 - **Source:** *Document*
 - **Email:** *Owner->Default Contact->Email*
6. On the **Fields** tab, add a row with the following settings:
 - **Active:** Selected
 - **Field Name:** *Owner*
7. On the form toolbar, click **Save**.
8. Open the Send Notifications (SM205050) form, and click **Schedule > Add** on the form toolbar.
9. On the Automation Schedules (SM205020) form, which opens in a pop-up window, configure a schedule for the periodic sending of notifications.

Step 4: Assigning Leads by Using an Assignment Map

To assign leads to owners by using the lead assignment map that you created, do the following:

1. Open the Assign Leads (CR503010) form.

2. In the table, click the header of the **Owner** column, and select the *Is Null* filter condition.
Now only the leads without an owner are listed in the table.
3. On the form toolbar, click **Process All**.

If you have a large list of leads, the processing can take a considerable amount of time.

As a result of this processing, all leads that have met the criteria of the assignment map have been assigned, depending on the source of their origin, to the appropriate owners.

Forms Used

In this lesson, you have used the following forms:

[Assignment and Approval Maps](#) (EP205500)

[Assignment Maps](#) (EP205010)

[Automation Notifications](#) (SM205040)

[Send Notifications](#) (SM205050)

[Automation Schedules](#) (SM205020)

[Assign Leads](#) (CR503010)

Communication and Activities

Marketing employees need to communicate with the leads that are assigned to them to confirm their contact information, introduce products and services to them, and gather any valuable information that may help in building the relationship between the company and its potential customers.

To keep track of communication activities in Acumatica ERP, users can create tasks, events, emails, and activities of various types. If a task, event, email, or activity is created on the **Activities** tab of the Leads (CR301000), Contacts (CR302000), Marketing Lists (CR204000), or Marketing Campaigns (CR202000) data entry form, this task, event, email, or activity becomes associated with the corresponding entity. Also, an email can be associated with an entity through the Acumatica add-in for Outlook.

Activities

To keep track of all work that is related to a particular lead, the lead owner should create activities. In Acumatica ERP, an activity is something you do that relates to an entity (for instance, to a lead), with which the activity record becomes associated in the system. Activities can be of various types, such as emails, phone calls, and notes. Events and tasks can also be regarded as specific activities.

You can track activities (including tasks and events) and view their history. You can create activities for specific entities by using the Leads (CR301000), Contacts (CR302000), Marketing Lists (CR204000), and Marketing Campaigns (CR202000) data entry forms. When sending an email to a customer about a particular case, you can add information about activities related to this case. Activities associated with the specific entity being viewed are shown on the **Activities** tab of the form.



You can hide an event, task, or other activity from external users by selecting the **Internal** check box on **Details** tab of the Event (EP404100), Task (EP404000), or Activity (CR306010) form.

All activities (including current, completed, and not-yet-started ones) related to the selected entity—that is, the lead, contact, marketing list, or marketing campaign 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.

On the Activity Types (CR102000) form, you can add, view, edit, and delete types of activities.

Time Reporting

To enable time reporting for activities, you need to enable the *Time Reporting on Activity* feature on the Enable/Disable Features (CS100000) form, which makes the **Track Time** check box available on the Activity (CR306010) form. This check box, when selected, enables a group of elements on the same form which you can use to report the total time spent on the activity. Also, by using this group of elements, you can mark the activity as billable and specify the information required for billing—that is, the amount of billable time and the earning type of the activity; the earning type determines how the system calculates the cost of employee labor.

Emails

By using the Email Activity (CR306015) form, you can create and send an email to a lead or contact, or view the details of an existing email. When creating a new email, you can select an email template, an article from the knowledge base, or an activity with all its history of email exchange.

If a default email template has been created for email activities, this form will open with the template preloaded.

Tasks

You can create a new task by using the Task (EP404000) form or the **Activities** tab of a data entry form. By default, you are the owner of the task that you are creating; however, if needed, you can reassign the task by selecting another employee as the owner.

When you create a task, you can configure a reminder for it and specify on which day before the due date the task owner should receive the reminder. On the specified date, the reminder will appear on the task owner's Acumatica ERP screen so that the creator or the owner completes the task or changes its status.

Events

In Acumatica ERP, an event is a scheduled occurrence with an associated start time, date, and duration, such as a meeting, conference call, or trade show. You can create events and invite other employees, leads, contacts, or customers 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 Event (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.

Lesson 7: Activities

In this lesson, you will learn how to create an activity of a particular type and associate it with an existing lead. You will also learn how you can report the time spent on activities.

Story

Bill Owen, the marketing manager in SweetLife, has spent 30 minutes on the phone talking to Chuck Hester, a lead attracted by a banner on a website. Chuck Hester represents a large corporation interested in large amounts of exotic fruit.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.
- *Time Reporting on Activity* in the *Monitoring & Automation* group of features: Gives you the ability to track the time your employees spend on activities.

On the Leads (CR301000) form, the *Chuck Hester* lead has been added.

Process Overview

On the Leads (CR301000) form, you open a lead and then, on the **Activities** tab, add a phone call activity that will be associated with the lead. For the activity, you specify the time spent on the phone call and then complete the activity.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Creating an Activity

In this step, you will create a phone call activity associated with a particular lead. Proceed as follows:

1. On the Leads (CR3010PL) form, find and open the lead with whom you want to associate an activity (for instance, *Chuck Hester*).
2. On the Leads (CR301000) form, which opens, click the **Activities** tab.
3. On the table toolbar, click **Add Activity** and then select the **Add Phone Call** menu option.

The Activity (CR306010) form opens in a pop-up window.

4. On this form, create a record by specifying the following settings, and save the record:

- **Summary:** Chuck Hester: confirmed lead
- **Date:** 01/30/2019
- **Track Time:** Selected
- **Status:** Completed
- **Earning Type:** Regular Hours
- **Time Spent:** 00:30
- **Billable:** Cleared

5. In the editor area, type your comments about the phone call—such as the following:

Mr. Hester belongs to a large corporation. They are interested in large amounts of exotic fruit. They may consider our offer.

6. Click **Save & Close** on the form toolbar.

As a result, a row with the *Phone Call* type is added to the table on the **Activities** tab of the Leads (CR301000) form.

Forms Used

In this lesson, you have used the following forms:

[Leads](#) (CR301000)

[Activity](#) (CR306010)

Lesson 8: Tasks

In this lesson, you will learn how to create a task associated with an existing lead. You will also learn how to assign a task to an owner and how to configure a reminder for a task.

Story

Bill Owen, the marketing manager in SweetLife, should plan his work related to a particular lead. Bill creates tasks, specifies task owners and due dates for the tasks, and sets up reminders. A task reminder will appear in the info area of the Acumatica ERP screen and will be blinking or highlighted in red until Bill completes the task or changes its status.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Leads (CR301000) form, the *Chuck Hester* lead has been added.

Process Overview

On the Leads (CR301000) form, you open a lead and then, on the **Activities** tab, add a task that will be associated with the lead.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Creating a Task

1. On the Leads (CR3010PL) form, find and open the lead with whom you want to associate a task (for instance, *Chuck Hester*).
2. On the Leads (CR301000) form, which opens, click the **Activities** tab.
3. On the table toolbar, click **Add Task**.
As a result, the Task (CR306020) form opens in a pop-up window.
4. On the **Details** tab of this form, specify the following settings:
 - **Summary**: A brief description of the task (for example, *Prepare meeting slides*)

- **Start Date:** The date when the task should be started
 - **Due Date:** The date by which the task should be completed
 - **Reminder:** Selected
 - **Remind at (Date):** The date when you want the task owner to receive a reminder about the task
5. On the form toolbar, click **Save & Close**.

As a result, a row with the *Task* type is added to the table on the **Activities** tab of the Leads (CR301000) form.

Forms Used

In this lesson, you have used the following forms:

[Leads](#) (CR301000)

[Task](#) (CR306020)

Lesson 9: Emails

In this lesson, you will learn how to create and send emails by using Acumatica ERP. You will also learn how you can log your communication activities and associate an email with a particular lead.

Story

To keep track of all communication that is related to a particular lead, Bill Owen, the marketing manager in SweetLife, registers email activities in the system and links them to the lead.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Leads (CR301000) form, the *Chuck Hester* lead has been added.

Process Overview

On the Leads (CR301000) form, you select a lead and then, on the **Activities** tab, add an email associated with this lead. In Outlook on the Web, you select an email and log it as an email activity associated with a particular lead by using the Acumatica add-in for Outlook.



To open any form in Acumatica ERP, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.
4. Make sure that the default system email account has been configured and a schedule for periodic sending and receiving of emails has been set up. For details, see [Lesson 1: The System Email Account](#).

Step 2: Creating an Email

To create an email activity associated with a particular lead, do the following:

1. On the Leads (CR3010PL) form, find and open the lead to whom you want to send an email (for instance, *Chuck Hester*).
2. On the Leads (CR301000) form, which opens, click the **Activities** tab.
3. On the table toolbar, click **Add Email**.

As a result, the Email Activity (CR306015) form opens in a pop-up window. The default system email address is specified in the **From** box and the lead's email address is specified in the **To** box.

4. In the **Subject** box of this form, specify an email subject (for instance, *Follow up re. training services*).

5. On the **Message** tab, type the text of the email body.

As an example, you can type the following message:

Dear Mr. Hester,

As promised, we have sent you a booklet with detailed information about our company and the services we provide.

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

As a result, a row with the *Email* type is added to the table on the **Activities** tab of the Leads (CR301000) 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.

Forms Used

In this lesson, you have used the following forms:

[Leads](#) (CR301000)

[Email Activity](#) (CR306015)

Lesson 10: Events

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

Story

Bill Owen, the marketing manager in SweetLife, wants to call a meeting with sales people and discuss the benefits that may be offered to a potential customer who is willing to buy large amounts of exotic fruit.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Leads (CR301000) form, the *Chuck Hester* lead has been added.

On the Employees (EP203000) form, a number of employees have been configured; they can be invited to the event.

Process Overview

On the Leads (CR301000) form, you open a lead and then, on the **Activities** tab, add an event that will be associated with the lead. By using the **Attendees** tab, you add the employees whom you want to invite to the event.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Creating an Event

In this step, you will create an event associated with a particular lead. Do the following:

1. On the Leads (CR3010PL) form, find and open the lead with whom you want to associate an event (for instance, *Chuck Hester*).
2. On the Leads (CR301000) form, which opens, click the **Activities** tab.

3. On the table toolbar, click **Add Event**.

As a result, the Event (CR306030) form opens in a pop-up window.

4. On the **Details** tab, specify the following settings:

- **Summary:** A brief description of the event (for instance, *Follow-up meeting*)
- **Location:** The location of the event
- **Start Time:** The date and time when the event will start
- **End Time:** The date and time when the event will end

For all other settings on this tab, leave the default values.

5. On the **Attendees** tab, add the employees whom you want to invite to the event.

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

As a result, a row with the *Event* type is added to the table on the **Activities** tab of the Leads (CR301000) form.

7. On the table toolbar on the **Attendees** tab, click **Invite All**.

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

Forms Used

In this lesson, you have used the following forms:

[Leads](#) (CR301000)

[Event](#) (CR306030)

Marketing Lists

A marketing list is a list of contacts that might share particular characteristics. In Acumatica ERP, you can create as many marketing lists as you need. Based on a marketing list, you can create mailing lists for mass-mailing newsletters, special offers, or other information that is sent periodically. Maintaining marketing lists is an effective way to advertise products and services and to keep in touch with confirmed contacts that are not yet ready to buy any of the currently offered products and services but might be interested in future offers (or might change their minds over time). The purpose of these activities is to stimulate feedback from contacts and boost their transition to real sales opportunities, or to encourage repeat sales.

Each marketing list can be configured to be either dynamic or static.

Dynamic Marketing Lists

A dynamic marketing list is formed automatically according to a set of solid rules. To mark a marketing list as dynamic, you need to select the **Dynamic List** check box on the **Configuration Options** tab of the Marketing Lists (CR204000) form. To define the rules according to which the list will be automatically formed and updated, you can do one of the following on the same tab:

- Leave the **Generic Inquiry** box empty, and on the **Selection Criteria** tab, specify necessary filter conditions to select list members from all leads, contacts, and employees that exist in the system.
- Specify in the **Generic Inquiry** box a generic inquiry form that lists contact records; then, in the **Shared Filter to Apply** box, you can select a shared filter that is available for the specified inquiry form.

The rules will be applied to the existing or newly added records, and the records that match the specified criteria will be automatically included in the list.

Static Marketing Lists

A static marketing list is formed manually. To configure a static marketing list, you need to clear the **Dynamic List** check box on the **Configuration Options** tab of the Marketing Lists (CR204000) form and then include particular records in the marketing list by doing one of the following:

- Clicking **Add Row** on the toolbar of the **List Members** tab of the form. Then you should add the needed data for the contact in the row. This step may be repeated as needed.
- Using the **Add Members** dialog box, which opens if you click **Add New Members** on the toolbar of the **List Members** tab of the form. In this dialog box, you can select list members from a specific data source, which can be either a different marketing list or a generic inquiry form that lists contact records. You can select a shared filter that is available for the specified inquiry form to be able to select members from only relevant records.
- Clicking **Load Records from File** on the **List Members** tab of the form to upload an Excel file with a list of contacts.
- Clicking **Add Row** on the toolbar of the **Marketing Lists** tab on the Leads (CR301000), Contacts (CR302000), or Business Accounts (CR303000) form. Then you should add the needed data for the marketing list in the row. You can repeat this step as needed.

Member Subscription

On some occasions, you might need to temporarily unsubscribe a particular contact from a marketing list. If this is the case, you do not have to remove the contact from the list of members; instead, you should do any of the following:

- Clear the check box in the **Subscribed** column for the particular contact on the **List Members** tab of the *Marketing Lists* form populated with the details of the marketing list
- Clearing the check box in the **Subscribed** column for the particular marketing list on the **Marketing Lists** tab of the *Leads, Contacts, or Business Accounts* form populated with the details of the list member

To turn the member's subscription back on, you should select the previously cleared check box.

Lesson 11: Marketing Lists

In this lesson, you will learn how to create static and dynamic marketing lists. You will learn how to add recipients to a static marketing list and how to create rules for automatic generation of a list of members for a dynamic marketing list.

Story

Bill Owen, the marketing manager in SweetLife, needs to create two mailing lists: one list should include all confirmed contacts who will regularly receive a newsletter with company news; the other list should include all end customers so that they can receive their special offers.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Leads (CR301000) and Contacts (CR302000) forms, a number of leads and contacts have been added, and on the Employees (EP203000) form, a number of employees have been configured; these leads, contacts, and employees can be added to a marketing list.

Process Overview

On the Marketing Lists (CR204000) form, you create a static marketing list and then add contacts to the list. On the same form, you create a dynamic marketing list with contacts selected automatically based on a contact class.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Creating a Static Marketing List

To create a marketing list, proceed as follows:

1. On the toolbar of the Marketing Lists (CR2040PL) form, click **New Record**.
The Marketing Lists (CR204000) form opens.
2. In the Summary area, specify the following settings:

- **Marketing List ID:** NEWS
 - **List Name:** Company News
 - **Active:** Selected
3. On the **Configuration Options** tab, make sure that the **Dynamic List** check box is cleared.
You will be able to add and remove list members, or make them active according to your needs or preferences.
 4. On the form toolbar, click **Save**.

Step 3: Adding Marketing List Members

To add members to a static marketing list, do any of the following:

- On the Marketing Lists (CR204000) form, on the table toolbar of the **List Members** tab, click **Add Row**, and then add the needed data for the contact in the row. You can repeat this instruction as needed.
- On the Marketing Lists (CR204000) form, click **Add New Members** on the table toolbar of the **List Members** tab to bring up the **Add Members** dialog box. In this dialog box, you can select list members from a specific data source, which can be either a different marketing list or a generic inquiry form that lists contact records. You can select any shared filter that is available for the specified inquiry form to be able to select members from only the relevant records.
- On the Contacts (CR302000) form, click **Add Row** on the table toolbar of the **Marketing Lists** tab, and then add the needed data for the marketing list in the row. This adds the selected contact to the marketing list you added to this table. You can repeat this instruction as needed.

Step 4: Creating a Dynamic Marketing List

1. Open the Marketing Lists (CR2040PL) form.
2. On the form toolbar, click **New Record**.
The Marketing Lists (CR204000) form opens.
3. In the Summary area, do the following:
 - a. In the **Marketing List ID** box, specify FRUITS.
 - b. In the **List Name** box, type Fruits for sale.
 - c. Select the **Active** check box to make the list active in the system.
4. On the **Configuration Options** tab, select the **Dynamic List** check box and leave the **Generic Inquiry** box empty.
5. On the **Selection Criteria** tab, click **Add Row** on the table toolbar and specify the selection rules for list members:
 - **Active:** Selected
 - **Property:** Class ID
 - **Condition:** Equals
 - **Value:** ENDCUST
6. On the form toolbar, click **Save**.
Now you can view the list of added members on the **List Members** tab.

Forms Used

In this lesson, you have used the following forms:

[Marketing Lists](#) (CR204000)

[Leads](#) (CR301000)

Marketing Campaigns

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.

In Acumatica ERP, you can create campaigns that have not yet been launched; you can also create campaigns that are in progress (perhaps with the help of other tools) and need to be recorded in the system. The data that you enter when you create a campaign can be used in statistical and analytical reports.

Campaign Preparation

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.

Campaign Execution

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 if the *Project Accounting* feature is enabled on the Enable/Disable Features (CS100000) form.

Campaign Statistics

In Acumatica ERP, you can view the following statistical information on marketing campaigns:

- On the **Campaign Details** tab of the Marketing Campaigns (CR202000) form, you can review the following values, which cannot be edited but may help you evaluate the effectiveness of an ongoing campaign:
 - **Total Members:** The total number of members assigned to the campaign
 - **Members Contacted:** The number of campaign members that have been contacted and have activities associated with them
 - **Members Responded:** The total number of campaign members that have responded to the campaign and have opportunities associated with them
 - **Leads Generated:** The number of leads that have been created due to the campaign
 - **Leads Converted:** The number of leads converted to contacts due to the campaign
 - **Opportunities:** The number of opportunities generated due to the campaign
 - **Won Opportunities:** The number of opportunities related to the campaign that have been eventually won
 - **Opportunities Value:** The total amount of the opportunities related to the campaign
 - **Won Opportunities Value:** The total amount of the won opportunities related to the campaign

- On the Campaign Summary (CR2020BI) inquiry form, you can review the statistical information on all active campaigns displayed in the table form.
- On the **Members** tab of the Marketing Campaigns form, you can review the number of opportunities, activities, and emails related to the campaign and associated with a particular campaign member.
- On the **Generated Leads** and **Opportunities** tabs of the Marketing Campaigns form, you can review lists of all leads and opportunities that have a specific marketing campaign specified as their source campaign.

Lesson 12: Campaigns

In this lesson, you will learn how to prepare and execute a marketing campaign by using Acumatica ERP. You will also learn how to review statistics on a campaign and evaluate the effectiveness of the campaign.

Story

SweetLife has launched a new marketing campaign to advertise its products. Large-sized banners are put out on billboards across the state to attract the attention of as many people as possible and to deliver a specific message to potential customers.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.

On the Campaign Classes (CR202500) form, the *BANNER* campaign class has been added

Process Overview

On the Marketing Campaigns (CR202000) form, you prepare a marketing campaign for outdoor banner advertising. 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.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.

Step 2: Preparing a Campaign

To configure a new marketing campaign in Acumatica ERP, do the following:

1. On the toolbar of the Marketing Campaigns (CR2020PL) form, click **New Record**.
The Marketing Campaigns (CR202000) form opens.
2. In the Summary area of this form, specify the following settings:
 - **Stage**: *Execution*
 - **Campaign Class**: *BANNER*

- **Campaign Name:** *Billboards*
3. On the **Campaign Details** tab, specify the following settings:
 - **Start Date:** *01/30/2019*
 - **Planned Budget:** Your estimate (for instance, *10000*)
 - **Expected Return:** Your estimate (for instance, *1000000*)
 4. Click **Save** on the form toolbar.

In Acumatica ERP, you can associate various activities with the campaign or create related leads and opportunities. All leads and opportunities associated with the campaign are listed on the **Generated Leads** and **Opportunities** tabs of the Marketing Campaigns (CR202000) form. The total numbers of leads and opportunities are displayed in the **Leads Generated** and **Opportunities** boxes on the **Campaign Details** tab of the same form. You can use this information to estimate the effectiveness of the campaign.

Forms Used

In this lesson, you have used the following forms:

[Marketing Campaigns](#) (CR202000)

[Leads](#) (CR301000)

Mass Emails

If you want to send information to all members of a marketing list by email, you can prepare a mass email and send it by using the Mass Emails (CR308000) form. A mass email can be sent to any of the following:

- The members of one mailing list or multiple mailing lists
- Particular leads, contacts, business accounts, and employees
- The members of a selected marketing campaign

Creating Mass Emails

To personalize emails, you can insert the recipient's data into the text of the email by using placeholders. You can create an email from scratch, or you can use a personal or shared predefined template—using predefined templates can save time.

Sending Mass Emails

If you have specified a large number of recipients, sending a mass email may require significant time. When you click **Send** on the form toolbar of the Mass Emails (CR308000) form, emails are only generated but not sent. You can initialize the actual process of sending emails by using the Send and Receive Email (SM507010) form, or it can be scheduled to be performed at the required frequency.

Processing Replies

To process replies to mass email, you can use the built-in automatic processing of incoming emails without additional configuration. As part of this processing, the system forwards incoming emails to employees in accordance with the tracked email history. Also, depending on your business, you can configure the system to create cases, leads, or activities associated with the existing leads or contacts and assign them to specific employees. You can adjust this processing to your business needs by using various settings on the **Incoming Mail Processing** tab of the System Email Accounts (SM204002) form.

Lesson 13: Mass Emails

In this lesson, you will learn how to send emails to the members of a marketing list or campaign and how to make the emails personalized by using a template.

Story

As part of the *Fruits at Half Price* marketing campaign, Bill Owen, the marketing manager in SweetLife, sends a promotional email to those potential customers of SweetLife that are interested in buying fruits.

Configuration Overview

For the purposes of this lesson, the following feature has been enabled on the Enable/Disable Features (CS101000) form:

- *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, management of business opportunities, contact maintenance, marketing lists, and campaign management.
- *Scheduled Processing* in the *Monitoring & Automation* group of features: Gives you the ability to create schedules for the automatic processing of documents.

On the Marketing Campaigns (CR202000) form, the *Fruits at Half Price* campaign has been configured as a running campaign, with a list of members specified.

Process Overview

You prepare a mass email by using the Mass Emails (CR308000) form. You create a mass email, specify a campaign as a source of intended email recipients, and then initiate the generation of emails. You initiate actual sending of the emails by using the Send and Receive Email (SM507010) form.



To open any form, you can navigate to it or search for it (by its name or by its form ID).

Step 1: Preparing the System

To sign in and prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as the marketing manager by using the *owen* user name and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select *1/30/2019* from the calendar. For simplicity, in this lesson, you will create and process all documents in the system during this business date.
3. On the company and branch selection menu, on the top pane of the Acumatica ERP screen, select the *SweetLife Head Office and Wholesale Center* branch.
4. Make sure that the default system email account has been configured and a schedule for periodic sending and receiving of emails has been set up. For details, see [Lesson 1: The System Email Account](#).

Step 2: Sending a Mass Email

To prepare and send a mass email to the members of a marketing campaign, do the following:

1. On the toolbar of the Mass Emails (CR3080PL) form, click **New Record**.

The Mass Emails (CR308000) form opens.

2. On the **Summary** tab of this form, specify the following settings:

- **From:** The system email account
- **Subject:** *Exotic Fruits at Half Price*
- **Source:** *Campaigns*
- **Planned:** *1/30/2019*
- **Status:** *Prepared*

3. In the text editor area, type a message such as the one shown below.

Dear ((FirstName)) ((LastName)),

During the next two weeks, you can purchase exotic fruits from SweetLife at half price.

Sincerely yours,

Bill Owen

4. On the **Campaigns** tab, select the check box in the row with the *Fruits at Half Price* campaign.

By selecting this check box, you create a mailing list based on the list of this campaign's members.

When you have many different campaigns listed in the table and you select a few, each contact that is included in multiple marketing campaigns receives the message only once. The same is true for marketing lists. Also, if multiple contacts have identical email addresses, the message is sent to only one of the contacts.

5. On the form toolbar, click **Save**, and then click **Send**.

6. In the **Confirmation** dialog box that opens, click **Yes**.

When you click **Yes**, emails are only generated but are not sent. To initiate the actual process of sending emails that have been generated, you could use the Send and Receive Email (SM507010) form. However, if you have already scheduled the sending process, it is to be executed automatically.

If you have selected many recipients, mass emailing may require significant time.

On the **Messages** tab of the Mass Emails (CR308000) form, you can view the list of sent messages with their statuses, and you can resend messages for which the sending operation has failed.

Forms Used

In this lesson, you have used the following forms:

[Mass Emails](#) (CR308000)

[Send and Receive Email](#) (SM507010)