

End-User Course

CRM Sales 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 sales 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 automate sales operations in Acumatica ERP. After you complete the course, you will have an understanding of how to perform basic sales operations by using the CRM functionality in Acumatica ERP. You will learn to qualify leads, manage customer contacts, perform communication with customers by using the tools that Acumatica ERP provides, and log activities of any kind. Also, you will learn how to configure opportunities, advance them through stages and create related sales quotes, sales orders, and invoices. You will learn how to use assignment maps for automatic assignment of records to employees for processing. Finally, you will learn how to prepare a promotional campaign and track its execution results in the system.

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.

Sales Automation in Acumatica ERP

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 sales personnel can perform the following tasks:

- Quickly convert leads to confirmed contacts, prospects, or opportunities
- Classify opportunities by using classes and attributes
- Assign opportunities to appropriate salespersons
- Prepare sales quotes
- Update quotes while negotiating prices and discounts
- Convert contacts to prospect business accounts that can be converted to customers
- Create sales orders and invoices based on opportunities
- Prepare and execute promotional campaigns
- Estimate future revenue for each financial period

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

David Chubb, the sales 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 sales manager by using the *chubb* 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)

Lesson 2: Lead Qualification

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

Story

David Chubb, the sales manager in SweetLife, has contacted, and thus qualified, three leads: Joseph Clapton, the CEO of a small retail shop that sells organic food, has shown no immediate interest in the offered services and goods. Mag Darrow, a representative of a chocolate house, has shown interest in jellies and qualifies as a prospect. Leslie Graff, a purchasing manager in a large store, has become interested in fruits and juices and displays an intention to buy as soon as possible.

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* and *ORGSIZE* attributes are configured. The values of the *INTEREST* attribute indicate the kinds of products and services that SweetLife can provide. The values of the *ORGSIZE* attribute indicate how many employees work in an organization that is a potential customer of the company.

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

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

On the Business Account Classes (CR208000) form, the *DEFAULT* class has been added.

On the Opportunity Classes (CR209000) form, the *PRODUCT* class has been added. The *INTEREST* and *ORGSIZE* attributes are specified for the class.

On the Leads (CR301000) form, the *Joseph Clapton*, *Mag Darrow*, and *Leslie Graff* leads have been added to the system.

Process Overview

You use actions on the form toolbar of the Leads (CR301000) form to convert a lead to a contact, to create a lead-based prospect, and to create a lead-based opportunity. On the Business Accounts (CR303000) form, you convert the newly created prospect to a customer because soon you may need to create an invoice for this prospect, which you can do only if the business account has the *Customer* type.



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 sales manager by using the *chubb* 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: Converting a Lead to a Contact

To convert a lead to a contact, do the following:

1. On the **All Records** tab of the Leads (CR3010PL) form, find and open the *Joseph Clapton* record. The Leads (CR301000) form opens with the data of the selected lead.
2. On the form toolbar of this form, click **Actions** and then select the **Convert to Contact** menu action.

The Contacts (CR302000) form opens with the data copied from the lead record. The type of the record changes from *Lead* to *Contact*, and *ENDCUST* is specified in the **Contact Class** box in the Summary area. You still can find the record on the Leads (CR301000) form, but its settings are no longer editable and its status has changed to *Converted*.

The contact can be further processed and converted to a business account or associated with an opportunity.

Step 3: Creating a Lead-Based Prospect

To create a prospect based on a lead, do the following:

1. On the **All Records** tab of the Leads (CR3010PL) form, find and open the *Mag Darrow* record. The Leads (CR301000) form opens. The form is filled in with the data of the selected lead.
2. On the form toolbar, click **Actions** and then select the **Create Business Account** menu action. The **New Account** dialog box opens; the company name is copied from lead details.
3. In the **New Account** dialog box, specify the following information, and then click **Create**:
 - **Business Account ID:** *CHOCOCO*
 - **Business Account Class:** *DEFAULT*

The Business Accounts (CR303000) form opens; it is filled in with the data of the lead record.



Newly created business accounts are considered to be prospects, as indicated by the **Type** value; however, they can be converted to customers or vendors.

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

As a result, the lead record is converted to a contact, a new business account is created, and the contact becomes associated with the business account.

Step 4: Converting the Prospect to a Customer

To convert a prospect business account to a customer, do the following:

1. On the **All Records** tab of the Business Accounts (CR3030PL) form, find and open the *CHOCOCO* record. The Business Accounts (CR303000) form opens. The form is filled in with the data of the selected business account.
2. On the form toolbar, click **Actions** and then select the **Convert to Customer** menu action.

The Customers (AR303000) form opens with the data of the business account filled in.

3. In the **Customer Class** box on the **General Info** tab, select *DEFAULT*.

In the dialog box that opens, click **Yes** to update the customer settings with the customer class settings.

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

Step 5: Creating a Lead-Based Opportunity

To create an opportunity based on a qualified lead, do the following:

1. On the **All Records** tab of the Leads (CR3010PL) form, find and open the *Leslie Graff* record. The Leads (CR301000) form opens. The form is filled in with the data of the selected lead.
2. On the form toolbar, click **Actions** and then select the **Create Opportunity** menu action. The Opportunities (CR304000) form opens; it is filled in with the data of the lead record.
3. In the Summary area of the form, specify the following information:
 - **Class ID:** *PRODUCT*
 - **Status:** *New*
 - **Stage:** *Prospect*
 - **Subject:** *Inquiry for fruits and juices*
4. On the **Attributes** tab, specify the following information:
 - *Interested in: Fruits and Juice*
 - *Organization size: 100-500 employees*
5. On the form toolbar, click **Save**.

As a result, the lead record is converted to a contact, a new opportunity is created, and the contact becomes associated with the opportunity.

Forms Used

In this lesson, you have used the following forms:

[Leads](#) (CR301000)

[Contacts](#) (CR302000)

[Business Accounts](#) (CR303000)

[Customers](#) (AR303000)

[Opportunities](#) (CR304000)

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), Business Accounts (CR303000), Opportunities (CR304000), Sales Quotes (CR304500), Cases (CR306000), Marketing Lists (CR204000), or Marketing Campaigns (CR202000) data entry form, this task, event, email, or activity becomes associated with the corresponding entity.

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), Business Accounts (CR303000), Opportunities (CR304000), Sales Quotes (CR304500), Cases (CR306000), 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, business account, opportunity, 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 3: Activities

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

Story

David Chubb, the sales manager in SweetLife, has spent 30 minutes on an appointment with other salespersons in his department discussing whether an assortment of berries can be added to the list of products offered in the *Inquiry for exotic fruits* opportunity.

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 Opportunities (CR304000) form, the *Inquiry for exotic fruits* opportunity has been added.

Process Overview

On the Opportunities (CR304000) form, you open an opportunity and then, on the **Activities** tab, add an appointment activity that will be associated with the opportunity. For the activity, you specify the time spent on the meeting 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 sales manager by using the *chubb* 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 an appointment activity associated with a particular opportunity. Proceed as follows:

1. On the Opportunities (CR3040PL) form, find and open the *Inquiry for exotic fruits* opportunity with which you want to associate the activity.
2. On the **Activities** tab of the Opportunities (CR304000) form, which opens, click **Add Activity** on the table toolbar and then select the **Add Appointment** menu action.

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

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

- **Summary:** *Berries to sell*
- **Date:** *01/30/2019*
- **Track Time:** Selected
- **Status:** *Completed*
- **Earning Type:** *Regular Hours*
- **Time Spent:** *00:30*
- **Billable:** Cleared

4. In the editor area, type your comments about the appointment—such as the following:

An assortment of berries is to be purchased and added to the list of offered products.

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

As a result, a row with the *Appointment* type is added to the table on the **Activities** tab of the Opportunities (CR304000) form.

Forms Used

In this lesson, you have used the following forms:

[Opportunities](#) (CR304000)

[Activity](#) (CR306010)

Lesson 4: Tasks

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

Story

David Chubb, the sales manager of SweetLife, assigns a task to Jack Carrey so that he finds a vendor of fresh and sweet berries for the *Inquiry for exotic fruits* opportunity. David creates a task, specifies the task owner and the due date for the task, and sets up a reminder. The task reminder will appear for Jack Carrey in the info area of the Acumatica ERP screen and will be blinking or highlighted in red until Jack 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 Opportunities (CR304000) form, the *Inquiry for exotic fruits* opportunity has been added.

Process Overview

On the Opportunities (CR304000) form, you open an opportunity and then, on the **Activities** tab, add a task that will be associated with the opportunity.



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 sales manager by using the *chubb* 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

To create a task that will be associated with an opportunity, do the following:

1. On the Opportunities (CR3040PL) form, find and open the *Inquiry for exotic fruits* opportunity with which you want to associate the task.
2. On the **Activities** tab of the Opportunities (CR304000) form, which opens, click **Add Task** on the table toolbar.

As a result, the Task (CR306020) form opens in a pop-up window.

3. On the **Details** tab of this form, specify the following settings:

- **Summary:** A brief description of the task (for example, `Look for a suitable vendor`)
- **Start Date:** The date when the task should be started
- **Due Date:** The date by which the task should be completed
- **Owner:** *Jack Carrey*
- **Reminder:** Selected
- **Remind at (Date):** The date when you want the task owner to receive a reminder about the task

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

4. 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 Opportunities (CR304000) form.

Forms Used

In this lesson, you have used the following forms:

[Opportunities](#) (CR304000)

[Task](#) (CR306020)

Lesson 5: Emails

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

Story

To keep track of all communication that is related to a particular opportunity, David Chubb, the sales manager in SweetLife, registers email activities in the system and links them to the opportunity.

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 Opportunities (CR304000) form, the *Inquiry for exotic fruits* opportunity has been added.

On the Contacts (CR302000) form, the *David Kelly* contact has been added. This contact is associated with the *Inquiry for exotic fruits* opportunity.

Process Overview

On the Opportunities (CR304000) form, you select an opportunity and then, on the **Activities** tab, add an email associated with this opportunity.



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 sales manager by using the *chubb* 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 opportunity, do the following:

1. On the Opportunities (CR3040PL) form, locate and click the *Inquiry for exotic fruits* opportunity with which you want to associate the email.
2. On the **Activities** tab of the Opportunities (CR304000) form, which opens, click **Add Email** on the table toolbar.

The Email Activity (CR306015) form opens in a pop-up window. The default system email address is specified in the **From** box. In the **To** box, the email address of the contact, David Kelly, which is associated with the opportunity, is specified.

3. In the **Subject** box of this form, specify an email subject (for instance, *Follow up re. the purchase of berries*).

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

As an example, you can type the following message:

Dear Mr. Kelly,

We can offer you not only a wide range of fresh exotic fruit and juice, but also any kind of fresh berry and berry jam you might like.

5. 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:

[Opportunities](#) (CR304000)

[Email Activity](#) (CR306015)

Lesson 6: Events

In this lesson, you will learn how to create an event and associate it with a particular opportunity. You will learn how you can schedule the time of the occurrence of the event and its duration. Also, you will learn how you can invite attendees to the event.

Story

David Chubb, the sales manager in SweetLife, wants to call a meeting with other salespersons and discuss which benefits may be offered to a potential customer who is willing to buy large amounts of exotic 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.

On the Opportunities (CR304000) form, the *Inquiry for exotic fruits* opportunity 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 Opportunities (CR304000) form, you open an opportunity and then, on the **Activities** tab, add an event that will be associated with the opportunity. By using the **Attendees** tab on the Event (CR306030) form, you add the employees that 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 sales manager by using the *chubb* 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 Event

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

1. On the Opportunities (CR3040PL) form, find and open the *Inquiry for exotic fruits* opportunity with which you want to associate the event.
2. On the **Activities** tab of the Opportunities (CR304000) form, which opens, click **Add Event** on the table toolbar.

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

3. 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.

4. On the **Attendees** tab, add the employees whom you want to invite to the event.
5. 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 Opportunities (CR304000) form.

6. 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:

[Opportunities](#) (CR304000)

[Event](#) (CR306030)

Opportunity Classes and Opportunity Stages

When an opportunity is processed by a salesperson, it progresses through various stages. At any particular stage, there is a particular probability, however low, that the sale can be successfully closed. By having probabilities assigned to the stages of opportunities, you can estimate future sales revenue at any time. The accuracy of revenue estimation heavily depends on the correct identification of the opportunity stage and on the accuracy of the related probability.

An administrator uses the **Stages** tab of the Opportunity Classes (CR209000) form to set up opportunity stages and their probabilities. The full list of opportunity stages is available to all opportunity classes. While setting up a particular opportunity class, an administrator selects the **Active** check box for the opportunity stages that apply to this class and clears this check box for the opportunity stages that do not apply to this class. If the check box is cleared for a stage that has been specified in any opportunity of the class, this stage becomes excluded from the list of available stages for opportunities of the class, but it still will be shown in reports. At least one stage must be active for each opportunity class.

The system offers a predefined list of opportunity stages, but this list seldom reflects the set of stages used in a company. To reflect the sales process established in the company, an administrator can modify the list by adding new stages or removing unnecessary ones, which will affect all existing opportunity classes. For each new stage, the administrator should specify an identifier, name, probability percentage, and sort order.

Lesson 7: Configuration of Opportunity Classes

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

Story

David Chubb, the sales manager in SweetLife, needs to handle opportunities of the following two types: those related to direct sales and those related to partner sales.

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* and *ORGSIZE* attributes are configured. The values of the *INTEREST* attribute indicate the kinds of products and services that SweetLife can provide. The values of the *ORGSIZE* attribute indicate how many employees work in an organization that is a potential customer of the company.

Process Overview

You use the Opportunity Classes (CR209000) form to create two opportunity classes: one for direct sales, and the other for partner sales. On the **Stages** tab of this form, you define opportunity stages and their probabilities for each class.



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 sales manager by using the *chubb* 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 Opportunity Class for Direct Sales

To create an opportunity class for direct sales, open the Opportunity Classes (CR209000) form and do the following:

1. On the form toolbar, click **Add New Record**, and in the Summary area, specify the following settings:
 - **Opportunity Class ID:** `DIRECT`
 - **Description:** `Direct sales`

- On the **Attributes** tab, add rows for the following attributes: *ORGSIZE* and *INTERESTED*.



When specifying an attribute, you can mark the attribute as required by selecting the **Required** check box. If you do, the user must specify a value for this attribute for each new opportunity of the class in order to save the record.

- On the **Stages** tab, select the **Active** check box for the stages listed in the table, and then modify the probability and sort order values as follows.

Name	Probability	Sort Order
<i>Prospect</i>	0	0
<i>Nurture</i>	15	15
<i>Qualification</i>	50	50
<i>Negotiation</i>	80	80
<i>Won</i>	100	100

- On the form toolbar, click **Save** to save the class and its settings to the database.

Step 3: Creating an Opportunity Class for Partner Sales

On the same form, create another class, for partner sales, as follows:

- On the form toolbar, click **Add New Record**, and in the Summary area, specify the following settings:
 - Opportunity Class ID:** PARTNER
 - Description:** Partner sales
- On the **Attributes** tab, add rows for the following attributes: *ORGSIZE* and *INTERESTED*.
- On the **Stages** tab, add rows for two new stages (*Proposal Sent* and *In Trial*) to the table, and specify their settings as shown in the table below. (Although you add these rows to the end of the table, the system then moves them based on their sort order when you save your changes.) Also, make sure that the **Active** check box is cleared for the *Qualification* and *Negotiation* stages and selected for the *Prospect*, *Nurture*, and *Won* stages.

Active	Stage ID	Name	Probability	Sort Order
Selected	O	Proposal Sent	40	40
Selected	T	In Trial	65	65

- On the form toolbar, click **Save** to save the class and its settings to the database.

If you select the *DIRECT* class and then click the **Stages** tab, you will see that the *Proposal Sent* and *In Trial* stages, which you added for the *PARTNER* class, are also visible for this class; however, the **Active** check box is cleared for these stages, so they will not be available for opportunities of the class.

Forms Used

In this lesson, you have used the following forms:

[Opportunity Classes](#) (CR209000)

Lesson 8: Opportunities

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

Story

David Chubb, the sales manager in SweetLife, receives inquiries for fruits and jams through a web form on the company's website.

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* and *ORGSIZE* attributes are configured. The values of the *INTEREST* attribute indicate the kinds of products and services that SweetLife can provide. The values of the *ORGSIZE* attribute indicate how many employees work in an organization that is a potential customer of the company.

On the Opportunity Classes (CR209000) form, the *PRODUCT* class has been added. The *INTEREST* and *ORGSIZE* attributes are specified for the class.

On the Customers (AR303000) form, the *HMBAKERY* customer has been added.

Process Overview

You create an opportunity on the Opportunities (CR304000) form and then, if needed, select proper values for the *INTEREST* attribute 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 sales manager by using the *chubb* 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 Opportunity Through the Web Interface

To create an opportunity through the web interface of Acumatica ERP, do the following:

1. On the form toolbar of the Opportunities (CR3040PL) form, click **New Record**.
2. In the Summary area of the Opportunities (CR304000) form that opens, do the following:
 - a. In the **Class ID** box, select *PRODUCT*.

- b. In the **Estimation** box, select the estimated date of the deal closure.
 - c. In the **Business Account** box, select *HMBAKERY*.
 - d. In the **Subject** box, specify the subject of the opportunity or a description (for instance, *Inquiry for apple jam*).
3. On the **Details** tab, specify the following information:
 - a. In the **Branch** box, select *HEADOFFICE*.
 - b. In the **Project** box, specify the non-project code.
4. Navigate to the **Attributes** tab and select *Jam* for the *Interested in* attribute.
5. On the form toolbar, click **Save**.

Forms Used

In this lesson, you have used the following forms:

[*Opportunities*](#) (CR304000)

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 opportunities, 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 records among workgroups or individual employees in an almost unlimited number of ways, based on particular lead properties or attributes. For example, contacts can be distributed by location (for instance, contacts with postal codes starting with *94* go to *Workgroup 1*, contacts 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 Opportunities (CR503110) 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 9: Assignment of Opportunities to Owners

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

Story

A potential customer of SweetLife is usually interested either in the products that the company offers or in its services. Thus, all opportunities get sorted accordingly and then each opportunity is assigned to a responsible employee who negotiates with the customer and (if needed) further processes the opportunity. To automatically assign opportunities to their proper owners, David Chubb, the sales 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 Opportunity Classes (CR209000) form, two opportunity classes, *PRODUCT* and *SERVICE*, have been configured.

On the Opportunities (CR304000) form, a number of unassigned opportunities have been added to the system.

Process Overview

You use the Assignment Maps (EP205010) form to create an opportunity assignment map, and then you specify this map as the default opportunity 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 Opportunities (CR503110) form, you run the process of automatically assigning opportunities to owners in accordance with the rules specified in the opportunity 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 sales manager by using the *chubb* 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](#) in this course.

Step 2: Creating an Assignment Map

To create an assignment map that you will use later to automatically assign opportunities 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:** *Opportunity Assignment Map*
 - **Entity Type:** *Opportunities*
3. On the toolbar of the **Rules** pane, click **Add Rule**.
4. In the **Description** box on the **Conditions** tab, type *Products*, 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 condition for the first rule:
 - **Entity:** *Opportunity*
 - **Field Name:** *Class ID*
 - **Condition:** *Equals*
 - **Value:** *PRODUCT*

This row establishes the condition, which is the opportunity class ID being equal to *PRODUCT*.
6. On the **Rule Actions** tab, specify the following settings:
 - **Assign Ownership To:** *Employee*
 - **Workgroup:** *Sales Assignments>Sales 1*
 - **Employee:** *Jack Carrey*
7. On the toolbar of the **Rules** pane, click **Add Rule** to add another rule.
8. In the **Description** box on the **Conditions** tab, type *Services*, which is the name of the second rule.
9. On the table toolbar, click **Add Row**, and in the row, specify the following settings, which make up the condition for the second rule:
 - **Entity:** *Opportunity*
 - **Field Name:** *Class ID*
 - **Condition:** *Equals*

- **Value:** SERVICE
10. On the **Rule Actions** tab, specify the following settings:
 - **Assign Ownership To:** *Employee*
 - **Workgroup:** *Sales Assignments>Sales 2*
 - **Employee:** *Archibald Knorr*
 11. On the toolbar of the **Rules** pane, click **Add Rule** to add another rule.
 12. In the **Description** box on the **Conditions** tab, type `Other`, which is the name of the third rule.
 13. 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 third rule:
 - **Entity:** *Opportunity*
 - **Field Name:** *Class ID*
 - **Condition:** *Does Not Equal*
 - **Value:** PRODUCT
 - **Operator:** *And*
 14. Add another row, and in the row, specify the following settings, which make up the second line of conditions:
 - **Entity:** *Opportunity*
 - **Field Name:** *Class ID*
 - **Condition:** *Does Not Equal*
 - **Value:** SERVICE

These two rows establish the condition, which is the opportunity class ID being any other than *SERVICE* or *PRODUCT*. This rule will cover all exceptional cases, such as when a new opportunity class has been added to the system but the assignment map has not been updated yet.
 15. On the **Rule Actions** tab, specify the following settings:
 - **Assign Ownership To:** *Employee*
 - **Employee:** *David Chubb*
 16. On the form toolbar, click **Save**.
 17. 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 **Opportunity Assignment Map** box.
 - b. On the form toolbar, click **Save**.

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

Step 3: Setting Up Email Notifications

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

1. Open the Automation Notifications (SM205040) form.
2. In the Summary area of the form, specify the following settings:
 - **Screen ID:** *Opportunities (Organization > Customer Management > Work Area > Enter)*

- **Description:** New Opportunity Owner Assigned
 - **Active:** Selected
 - **Public:** Cleared
 - **Subject:** You have been assigned to a new opportunity
 - **Data Source:** *None*
3. On the **Message** tab, in the text area, type the following message:


```
Dear ((Opportunity.OwnerID)),
You have been assigned to a new opportunity: ((Opportunity.Subject)).
Please start processing this opportunity.

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 opportunities to owners by using the opportunity assignment map that you created, do the following:

1. Open the Assign Opportunities (CR503110) form.
2. In the table, click the header of the **Owner** column, and select the *Is Null* filter condition.

Now only the opportunities without an owner are listed in the table.
3. On the form toolbar, click **Process All**.

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

As a result of this processing, all opportunities that have met the criteria of the assignment map have been assigned, depending on their class, 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 Opportunities (CR503110)

Quotes

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

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

Sales quote functionality becomes available in the system if the *Sales Quotes* feature is enabled on the Enable/Disable Features (CS100000) form.

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

The functionality of project quotes is available only if the *Project Quotes* feature is enabled on the Enable/Disable Features form.

Creation of Sales Quotes

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

- By clicking **Create Quote** on the form toolbar of the Opportunities (CR304000) form
- By clicking **Create Quote** on the table toolbar of the **Quotes** tab on the Opportunities form
- By clicking **Add New Record** on the form toolbar of the Sales Quotes (CR304500) form
- By selecting an existing quote and then invoking the **Copy Quote** action, which is available on the **Quotes** tab on the Opportunities form and on the **Actions** menu on the form toolbar of the Sales Quotes form; in this case, a copy of the selected quote is created

Primary Quotes

If one quote or multiple quotes are created for an opportunity, one of the quotes must be marked as the primary quote, which a user can do either during the creation of a quote or by applying the **Mark as Primary** action to a selected quote.

An opportunity uses the primary quote as the source of the following settings: the list of products, the currency and the currency rate, the location, the contact information, and the tax and discount details. If a user marks a different quote as the primary quote for the opportunity, these settings are changed in the opportunity to those of the new primary quote.

Sales Quote Activities

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

Statuses of a Sales Quote

A quote can have one of the following statuses:

- *Draft*: The quote is being prepared and its details can be edited.

- *Prepared*: The quote is ready to be sent to the customer. The quote gets this status after it has been submitted or, if approval is required for quotes, after it has been approved.
- *Sent*: The quote has been emailed to the customer.
- *Pending Approval*: The quote is pending approval within the company.
- *Rejected*: The quote has been rejected by an approver within the company.

Approval of Sales Quotes

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

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

A quote that is pending approval cannot be modified. An assigned approver can approve or reject the quote by using the standard **Approve** and **Reject** actions available on the form toolbar of the Sales Quotes (CR304500) form and on the table toolbar of the **Quotes** tab on the Opportunities (CR304000) form. After a quote has been approved, it can be sent to the customer.

Emailing of a Sales Quote

A user can send a submitted and, if approval of quotes is set up in the system, approved quote to a customer for review by selecting the quote and then invoking the **Send Quote** action, which is available on the **Quotes** tab on the Opportunities (CR304000) form and on the **Actions** menu on the form toolbar of the Sales Quotes (CR304500) form. In this case, an email activity is created, the quote is attached to the email activity in the form of a report, and the status of the quote changes to *Sent*.

The email is generated automatically in accordance with the mailing settings specified in the Customer Management module, which can be configured as follows:

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

For each mailing, the following settings may be specified:

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

Lesson 10: Sales Quotes

In this lesson, you will learn how to prepare a sales quote for an opportunity and how to send it to the customer for review. Also, you will learn how to use the primary quote if you have multiple quotes associated with one opportunity.

Story

On 1/30/2019, a representative of the Lake Cafe customer has ordered a juicer with the installation option and with the additional training of their employees on how to use the new equipment. After a phone call with the representative, David Chubb, the sales manager in SweetLife, creates a sales quote based on the items specified in the opportunity and send the quote to the customer for review. The customer has second thoughts and asks to remove the training item from the offer. The sales manager creates a second quote, marks it as primary, and sends it to the customer for another review.

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.
- *Inventory* in the *Standard Inventory* group of features: Gives you the ability to maintain stock items and create and process sales orders, purchase orders, and purchase requisitions—that is, documents that include stock items.

On the Opportunity Classes (CR209000), the *PROJECT* opportunity class has been configured.

On the Opportunities (CR304000) form, the *A juicer with the installation and training for Lake Cafe* opportunity has been added. The opportunity belongs to the *PROJECT* opportunity class and has the *Open* status.

On the Customers (AR303000) form, the *LAKECAFE* customer has been configured. This customer is specified for the *A juicer with the installation and training for Lake Cafe* opportunity.

On the Stock Items (IN202500) form, the *JUICER10* stock item has been configured. This stock item is included in the opportunity.

On the Non-Stock Items (IN202000) form, the *INSTALL* and *TRAINING* non-stock items have been configured. These non-stock items are also included in the opportunity.

Process Overview

You use the Opportunities (CR304000) form to create a sales quote based on the items listed on the **Document Details** tab.



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 sales manager by using the *chubb* 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: Preparing a Sales Quote

To prepare a sales quote based on an opportunity, do the following:

1. On the Opportunities (CR3040PL) form, find and open the *A juicer with the installation and training for Lake Cafe* opportunity.
2. On the form toolbar of the Opportunities (CR304000) form, which opens, click **Create Quote**. The **Create New Quote** dialog box opens.
3. In the dialog box, leave the default settings and click **Create and Review**.
4. On the form toolbar of the Sales Quotes (CR304500) form, which opens, click **Save** and then click **Submit Quote**.

The status of the quote changes from *Draft* to *Prepared*. Now the quote can be sent to the customer for review.

Step 3: Sending the Quote to the Customer

To send a quote to the customer, do the following:

1. On the Sales Quotes (CR3045PL) form, find and open the *A juicer with the installation and training for Lake Cafe* sales quote.
2. On the form toolbar of the Sales Quotes (CR304500) form, which opens, click **Actions** and then select the **Print Quote** menu action. The Sales Quote (CR604500) printable form with the details of the quote opens.
3. On the form toolbar of the printable form, click **Send**.
4. On the Email Activity (CR306015) form, which opens in a pop-up window, enter a message for the customer and then click **Send** on the form toolbar.

This creates an email activity associated with the sales quote. A PDF file with the quote is attached to the email, which will be sent to the customer email address from the default system email account.



If automation notifications are configured for the Sales Quotes (CR304500) form, you can click **Actions** and then select the **Send Quote** menu action on the form toolbar of the Sales Quotes form to send the quote to the customer.

Step 4: Preparing a New Primary Quote

To prepare a new primary quote, do the following:

1. On the Opportunities (CR3040PL) form, find and open the *A juicer with the installation and training for Lake Cafe* opportunity.
2. On the form toolbar of the Opportunities (CR304000) form, which opens, click **Create Quote**. The **Create New Quote** dialog box opens.

3. Make sure that the **Make New Quote Primary** check box is selected in the dialog box, and then click **Create and Review**.
4. On the **Document Details** tab of the Sales Quotes (CR304500) form, which opens, delete the row with the *TRAINING* item.
5. (Optional) Update the description of the quote (for instance, enter *A juicer with the installation for Lake Cafe* as a new description).
6. On the form toolbar, click **Save** and then click **Submit Quote**.

The status of the quote changes from *Draft* to *Prepared*. On the Document Details tab of the Opportunities (CR304000) form, the *TRAINING* item becomes excluded from the list of items specified for the *A juicer with the installation and training for Lake Cafe* opportunity. Now you can send the new quote to the customer for another review.

Forms Used

In this lesson, you have used the following forms:

[Opportunities](#) (CR304000)

[Sales Quotes](#) (CR304500)

[Sales Quote](#) (CR604500)

[Email Activity](#) (CR306015)

Lesson 11: Opportunity-Based Sales Orders

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

Story

On 1/30/2019, a representative of the Lake Cafe customer has ordered packages of assorted black, green, and fruit tea after a period of negotiation over the prices and quantities. David Chubb, the sales manager in SweetLife, marks the corresponding opportunity as successfully closed (that is, won) and creates a sales order based on this opportunity.

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.
- *Inventory* in the *Standard Inventory* group of features: Gives you the ability to maintain stock items and create and process sales orders, purchase orders, and purchase requisitions—that is, documents that include stock items.

On the Opportunity Classes (CR209000), the *PRODUCT* opportunity class has been configured.

On the Opportunities (CR304000) form, the *Assorted teas for Lake Cafe* opportunity has been added. The opportunity belongs to the *PRODUCT* opportunity class and has the *Open* status.

On the Customers (AR303000) form, the *LAKECAFE* customer has been configured. This customer is specified for the *Assorted teas for Lake Cafe* opportunity.

On the Stock Items (IN202500) form, the *BLACKTEA06*, *FRUITTEA12*, and *GREENTEA06* stock items have been configured. These stock items are included in the opportunity.

Process Overview

You use the Opportunities (CR304000) form to mark a successfully closed opportunity as *Won* and then create a sales order by clicking the **Create Sales Order** menu action on the **Actions** menu on the form toolbar.



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 sales manager by using the *chubb* 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: Closing an Opportunity

To close an opportunity as won, perform the following instructions:

1. On the Opportunities (CR3040PL) form, find and open the *Assorted teas for Lake Cafe* opportunity.
2. In the Summary area of the Opportunities (CR304000) form, which opens, specify the following settings, and then save your changes:
 - **Status:** *Won*
This status indicates that the opportunity has been successfully closed—that is, it resulted in actual sales.
 - **Stage:** *Won*
The stage also needs to be specified, because when analyzing sales efficiency, you may prepare, for instance, a chart of opportunities won at different stages.

Step 3: Creating a Sales Order

To create a sales order based on an opportunity, do the following:

1. On the Opportunities (CR3040PL) form, find and open the *Assorted teas for Lake Cafe* opportunity.
2. On the form toolbar of the Opportunities (CR304000) form, which opens, click **Actions** and then select the **Create Sales Order** menu action.
3. In the Create Sales Order dialog box that opens, leave default values for all settings and click **OK**.
The Sales Orders (SO301000) form opens with the data copied from the details of the opportunity.
4. On the form toolbar, click **Save**.
As a result, a new sales order has been created; you can adjust its details and further process it according to the workflow used in your company.

Forms Used

In this lesson, you have used the following forms:

[Opportunities](#) (CR304000)

[Sales Orders](#) (SO301000)

Lesson 12: Opportunity-Based Invoices

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

Story

On 1/30/2019, a representative of the Lake Cafe customer has ordered repair services for a juicer, which they bought in SweetLife and which had broken due to incorrect handling by their employees. After a period of negotiation, the representative also asked for a training for their employees on how to work with the equipment. David Chubb, the sales manager in SweetLife, marks the corresponding opportunity as successfully closed (that is, won) and creates an invoice based on this opportunity.

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 Opportunities (CR304000) form, the *Repairs and training for Lake Cafe* opportunity has been added. The opportunity belongs to the *SERVICE* opportunity class and has the *Open* status.

On the Customers (AR303000) form, the *LAKECAFE* customer has been configured. This customer is specified for the *Repairs and training for Lake Cafe* opportunity.

On the Non-Stock Items (IN202000) form, the *REPAIR* and *TRAINING* non-stock items have been configured. These items are included in the opportunity.

Process Overview

You use the Opportunities (CR304000) form to mark a successfully closed opportunity as *Won* and then create an invoice by clicking the **Create Invoice** menu action on the **Actions** menu on the form toolbar.



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 sales manager by using the *chubb* 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: Closing an Opportunity

To close an opportunity as won, perform the following instructions:

1. On the Opportunities (CR3040PL) form, find and open the *Repairs and training for Lake Cafe* opportunity.
2. In the Summary area of the Opportunities (CR304000) form, which opens, specify the following settings, and then save your changes:
 - **Status:** *Won*
This status indicates that the opportunity has been successfully closed—that is, it resulted in actual sales.
 - **Stage:** *Won*
The stage also needs to be specified, because when analyzing sales efficiency, you may prepare, for instance, a chart of opportunities won at different stages.

Step 3: Creating an Invoice

To create an invoice based on an opportunity, do the following:

1. On the Opportunities (CR3040PL) form, find and open the *Repairs and training for Lake Cafe* opportunity.
2. On the form toolbar of the Opportunities (CR304000) form, which opens, click **Actions** and then select the **Create Invoice** menu action.
3. In the Create New Invoice dialog box that opens, leave default values for all settings and click **OK**.
The Invoices and Memos (AR301000) form opens with the data copied from the details of the opportunity.
4. On the form toolbar, click **Save**.
As a result, a new invoice has been created; you can adjust its details and further process it according to the workflow used in your company.

Forms Used

In this lesson, you have used the following forms:

Opportunities (CR304000)

Invoices and Memos (AR301000)

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.

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 13: Promo Campaigns

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

Story

SweetLife is going to launch a new campaign to promote its products. During a two-week period, each of the company's contacts will have an opportunity to try its jams and jellies at half price.

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 *EMAIL* campaign class for mass mailings has been configured.

On the Contacts (CR302000) form, a number of contacts have been added.

On the Marketing Lists (CR204000) form, the *PROMO* marketing list has been created. This list includes contacts that are a potential target audience for a promotional mailing.

Process Overview

On the Marketing Campaigns (CR202000) form, you prepare a campaign for promotional mass mailing and add members to the campaign. As the campaign comes to the completion, you mark it as executed and then, on the **Campaign Details** tab, review the campaign statistics, if needed.



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 sales manager by using the *chubb* 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 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:** *Planning*
 - **Campaign Class:** *EMAIL*
 - **Campaign Name:** *Jams and Jellies at Half Price*
3. On the **Campaign Details** tab, specify the following settings:
 - **Start Date:** *01/30/2019*
 - **End Date:** *02/20/2019*
 - **Planned Budget:** Your estimate (for instance, *10000*)
 - **Expected Return:** Your estimate (for instance, *1000000*)
 4. Click **Save** on the form toolbar.
 5. Add contacts to the list of campaign members in any of the following ways:
 - On the Marketing Campaigns (CR202000) form, on the table toolbar of the **Members** tab, click **Add Row**. In the row, you then add the needed data for the record. You can repeat this instruction as needed. You can use this method as a quick way of adding specific contacts to a list of campaign members.
 - On the Marketing Campaigns (CR202000) form, on the table toolbar of the **Members** tab, click **Add New Members** to open the **Add Members** dialog box. In this dialog box, you can select list members from a specific data source, which can be either a 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 Marketing Campaigns (CR202000) form, on the table toolbar of the **Members** tab, click **Load Records from File** and upload an Excel file with a list of contacts.
 - On the Contacts (CR302000) form, on the table toolbar of the **Campaigns** tab, click **Add Row**. You then add the needed data for the marketing campaign in the row. You can repeat this instruction as needed.

Step 3: Executing a Campaign

Perform the following steps:

1. To indicate that the execution of the campaign has started, in the **Stage** box on the Marketing Campaigns (CR202000) form, select *Execution*, and save your changes.
2. To then indicate that the campaign has completed, select the *Completed* stage, and again save your changes.

In Acumatica ERP, as a marketing campaign progresses through stages, 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 could create an activity associated with a particular campaign member by doing the following:

1. Select the campaign member on the **Members** tab of the Marketing Campaigns (CR202000) form
2. Select the appropriate command on the **Add Activity** menu.

Forms Used

In this lesson, you have used the following forms:

Marketing Campaigns (CR202000)

Contacts (CR302000)