**Job Aids**

Coordinator 2021 R2

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# Managing Marketing Lists and Campaigns

This chapter contains instructions related to managing marketing lists and campaigns in Acumatica ERP.

## To Create a Static Marketing List

1. Open the [*Marketing Lists*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=7f9021d1-1ea0-436c-a0a4-94b9d6d13227) (CR204000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record** and in the Summary area, do the following:
	1. In the **Marketing List ID** box, specify the identifier of the marketing list.
	2. In the **List Name** box, type the name of the marketing list.
	3. Select the **Active** check box to make the list active in the system.
	4. If needed, in the **Workgroup** box, select the workgroup that owns this marketing list.
	5. If needed, in the **Owner** box, select the employee responsible for this marketing list.
2. On the **Configuration Options** tab, make sure that the **Dynamic List** check box is cleared.
3. On the form toolbar, click **Save**.

## To Create a Dynamic Marketing List

1. Open the [*Marketing Lists*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=7f9021d1-1ea0-436c-a0a4-94b9d6d13227) (CR204000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record** and in the Summary area, do the following:
	1. In the **Marketing List ID** box, specify the identifier of the marketing list.
	2. In the **List Name** box, type the name of the marketing list.
	3. Select the **Active** check box to make the list active in the system.
	4. If needed, in the **Workgroup** box, select the workgroup that owns this marketing list.
	5. If needed, in the **Owner** box, select the employee responsible for this marketing list.
2. On the **Configuration Options** tab, select the **Dynamic List** check box.
3. On the same tab, specify the selection rules for list members in one of the following ways:
* Leave the **Generic Inquiry** box empty, and on the **Selection Criteria** tab, specify the necessary filter conditions to select list members from all leads, contacts, and employees that exist in the system.
* Specify in the **Generic Inquiry** box a generic inquiry form that lists contact records, and in the **Shared Filter to Apply** box, select a shared filter that is available for the specified inquiry form.
1. On the form toolbar, click **Save**.

## To Add Members to a Static Marketing List

1. Open the Marketing Lists (CR2040PL) form.
2. In the table, click the marketing list that you want to populate with members. The [*Marketing Lists*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=7f9021d1-1ea0-436c-a0a4-94b9d6d13227) (CR204000) form opens.
3. On the **List Members** tab, do any of the following:
	* On the table toolbar, click **Add Row**. In the **Name** column, select the name of member from the lookup box. The system adds a row with the lead's data to the table.
	* On the table toolbar, click **Add New Members**. In the **Add Members** dialog box which opens, do the following:
4. In the **Data Source** box, select the source of the information about list members.
	1. If the *Inquiry* option is selected:
		1. In the **Generic Inquiry** box, select list of contact records from a specific data source in the lookup box.
		2. In the **Shared Filter to Apply** select any shared filter that is available for the specified inquiry form in the lookup box, to be able to select members from only the relevant records.
	2. If the *Marketing List* option is selected, in the **Marketing List** box select list of contact records from a specific data source in the lookup box.
5. Select the unlabeled check box for leads you want to add to the member of the marketing list.
6. Click **Add** (if you want to add only selected leads) or **Add All** (if you want to add all leads from the list). The system closes the dialog box, adds the leads to the members of the marketing list, and saves the changes to the marketing list.
7. On the form toolbar, click **Save**.

## To Create a Campaign

1. Open the [*Marketing Campaigns*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=183be654-0b0a-446d-8bec-a6d478ce6620) (CR202000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**, and in the Summary area of the form, do the following:
	1. In the **Campaign Name** text box, type the name of the campaign.
	2. In the **Campaign Class** box, select a campaign class.
	3. In the **Stage** box, select *Planning* if you are preparing a new campaign or *Execution* if you are entering information about an ongoing campaign.
	4. If needed, in the **Owner** box, select employee responsible for the campaign.
2. On the **Campaign Details** tab, specify the campaign properties as follows:
	1. In the **Start Date** box, specify the start date of the campaign.
	2. If needed, in the **End Date** box, specify the end date of the campaign.
	3. If needed, in the **Workgroup** box, select the responsible workgroup to which the campaign belongs.
	4. If needed, in the **Expected Response** box, specify the number of responses to the campaign that you anticipate.
	5. If needed, in the **Planned Budget** box, specify the budget that you intend to spend on the campaign.
	6. If needed, in the **Expected Return** box, specify the return that you expect as a result of the campaign.
	7. If needed, in the **Promo Code** box, type the promotion code used in the campaign.
	8. If needed, in the **Project ID** box, select the project that is associated with the campaign.
3. On the form toolbar, click **Save**.

## To Add Members to a Campaign

1. Open the Marketing Campaigns (CR2020PL) form.
2. In the table, click the campaign for which you want to specify a list of members. The [*Marketing Campaigns*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=183be654-0b0a-446d-8bec-a6d478ce6620) (CR202000) form opens.
3. On the **Members** tab, add leads to the list of campaign members in any of the following ways:
	* On the table toolbar, click **Add Row**.

In the **Name** column, select the name of member. The system adds a row with the lead's data to the table.

* + On the table toolbar, click **Add New Members**. In the **Add Members** dialog box which opens, do the following:
1. In the **Data Source** box, select the source of the information about list members.
	1. If the *Inquiry* option is selected:
		1. In the **Generic Inquiry** box, select list of contact records from a specific data source in the lookup box.
		2. In the **Shared Filter to Apply** select any shared filter that is available for the specified inquiry form in the lookup box, to be able to select members from only the relevant records.
	2. If the *Marketing List* option is selected, in the **Marketing List** box select list of contact records from a specific data source in the lookup box.
2. Select the unlabeled check box for leads you want to add to the member of the marketing campaign.
3. Click **Add** (if you want to add only selected leads) or **Add All** (if you want to add all leads from the list). The system closes the dialog box, adds the leads to the members of the marketing campaign, and saves the changes to the marketing campaign.
	* On the table toolbar, click **Load Records from File**.
4. In the window that opens, find the .xls file with the list of campaign members and select it to upload.
5. In the **Common Settings** dialog box, which opens, leave the default values and click OK.
6. In the **Columns** dialog box, which opens, leave the default values and click **OK**.
7. On the form toolbar, click **Save**.

## To Send a Mass Email

1. Open the [*Mass Emails*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=161aba8e-295a-4366-bfdf-25567f92535f) (CR308000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record** and on the **Summary** tab, do the following:
	1. In the **From** box, select the system email address to be used to send the mass email.
	2. In the **Subject** box, type the subject of the mass email.
	3. In the **Source** box, select the source of the information about email recipients to be used for this mass mail.
	4. In the **Planned** box, select the date when you plan to send this mass mail.
	5. In the **Status** box, select *Prepared* if the mass email is ready to be sent or *On Hold* if you plan to edit it some time later before sending it.
2. In the text editor area, type the message that you want to mass email.
3. Do one of the following:
* If you selected *Marketing Lists* in the **Source** box, on the **Marketing Lists** tab, select the unlabeled check box for each marketing list whose members should receive the mass email.
* If you selected *Campaigns* in the **Source** box, on the **Campaigns** tab, select the unlabeled check box for each campaign whose members should receive the mass email.
* If you selected *Leads/Contacts/Employees* in the **Source** box, on the **Leads/Contacts/ Employees** tab, select particular leads, contacts, and employees who should receive the mass email.
1. On the form toolbar, click **Save**, and then click **Send**.

# Managing Leads and Contacts

This chapter contains instructions related to managing leads and contacts in Acumatica ERP.

## To Create a Lead

1. Open the [*Leads*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ce564fa0-baca-4d9b-97a8-ec69910de4c2) (CR301000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the Summary area, in the **Source** box, select the lead source.
3. On the **Contact Info** tab, do the following:
	1. In the **Contact** section, specify the contact details.
	2. In the **Address** section, specify the address details, and in the **Country** box, select the country of the lead.
4. On the **CRM Info** tab, in the **Lead Class** box, select the class with which the lead record will be associated.
5. On the form toolbar, click **Save**.

## To Create a Lead by Using the Acumatica Add-In

1. Open Outlook and select an email from the lead.

You can select any email from your incoming mail.

1. Click the Acumatica button.
2. On the Acumatica add-in for Outlook form, which opens, click **Create Lead**.
3. In the **Info** section, which appears on the add-in for Outlook form, notice that the values in the **First Name**, **Last Name**, and **Email** boxes have been populated with the information from the email.
4. If needed, specify the following information:
	1. In the **Position** box, type the lead's job title or position.
	2. In the **Account** box, select the business account that will be associated with the lead.

We recommend that you specify a business account of the customer type for any new lead. If you do not do so, then afterward you may be unable to create a case associated with this lead because the case class you specify for the case may require a customer.

* 1. In the **Account Name** box, type the business name of the lead’s company.
	2. In the **Source** box, select the source of the lead, which can be one of the following: *Web*, *Phone Inquiry*, *Referral*, *Purchased List*, *Campaign*, *Organic Search* or *Other*.
	3. In the **Country** box, select the country of the lead.
1. Click **Create Lead** to submit the specified information.

## To Import Leads by Using an Import Scenario

1. Open the [*Import by Scenario*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=88ac7166-2cc0-4201-ab3e-659ada2d74f2) (SM206036) form.
2. In the **Name** box, select the import scenario.
3. On the form title bar, click **Files**. The **Files** dialog box opens.
4. In this dialog box, click **Browse**, select the needed source file, and then click **Upload**. After the file has been successfully uploaded, close the **Files** dialog box.
5. On the form toolbar, click **Prepare**.

The table on the **Prepared Data** tab becomes populated with the data from the uploaded file.

1. If needed, exclude certain records in the list from import by clearing the check boxes in the

**Active** column for these records.

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

## To Create a Contact

1. Open the [*Contacts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=75a5dea9-d640-4b71-95b1-88534c4afad7) (CR302000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**, and on the **Details** tab, do the following:
	1. In the **Contact** section, type the contact's name in the **First Name** and **Last Name** boxes and specify other available details about the contact.
	2. In the **Address** section, in the **Country** box, select the country of the contact and specify other available details about the address.
2. On the **CRM Info** tab in the **Contact Class** box of the **CRM** section, select the class with which the contact record will be associated.
3. On the form toolbar, click **Save**.

## To Convert a Lead to a Contact

1. Open the Leads (CR3010PL) form.
2. In the table, click the lead record for which you want to create a linked contact. The [*Leads*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ce564fa0-baca-4d9b-97a8-ec69910de4c2)(CR301000) form opens. Make sure, that the lead has the *New*, *Open*, *Sales-Ready*, or *Sales- Accepted* status.
3. On the More menu (under **Record Creation**), click **Create Contact**.

The **New Contact** dialog box opens. The dialog box is filled in with the contact information specified for the lead.

1. In the dialog box, do the following:
	1. If needed, on the **Main** tab, specify missing values and adjust the default ones.
	2. Click **Create**.

## To Calculate Grams

1. Open the [*Calculate Grams*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=1598cf0e-a9ba-415c-967e-1cb8284bfe36) (CR503400) form.
2. Do one of the following:
	* To calculate grams for individual records, select the appropriate unlabeled check boxes and click **Process** on the form toolbar.
	* To calculate grams for all listed records, click **Process All** on the form toolbar.

## To Validate Leads and Contacts for Duplicates

1. Open the [*Validate Records*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=456dee8a-b53f-489b-9b4a-d0c578c883ff) (CR503430) form.
2. Do one of the following:
	* If you want to check all listed records for possible duplicates, select the **Validate All Records** option button.
	* If you want to check all new records for possible duplicates (or resume validation of all records), select the **Validate Only New and Updated Records** option button.
3. To initiate the validation process, click **Process All** on the form toolbar.
4. To view possible duplicates after the validation process has been completed, do one of the following:
	* In the table, click the heading of the **Duplicate** column and create a filter to view only records with the *Possible Duplicate* status.
	* To see if possible duplicates have been found for a particular lead or contact, find the record you need on the [*Leads*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ce564fa0-baca-4d9b-97a8-ec69910de4c2) (CR301000) or [*Contacts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=75a5dea9-d640-4b71-95b1-88534c4afad7) (CR302000) form. The **Duplicates** tab will be available on the form if there are possible duplicates.

## To Merge Duplicates

1. Open the Leads (CR3010PL) or Contacts (CR3020PL) form, depending on the type of the duplicated record.

The system does not allow merging leads that are linked to different contacts.

1. In the table, click the record that has a possible duplicate.
2. On the **Duplicates** tab of the form that opens, select the unlabeled check box for the possible duplicate displayed in the table.
3. Click **Merge** on the table toolbar.

The **Please Resolve the Conflicts** dialog box opens.

1. In the dialog box, do the following:
	1. In the **Target** box, select the record that you want to remain as the original record.
	2. In the **Value** column, select values to be specified for the target record.
	3. Click **OK**.

## To Assign a Lead to an Owner

1. Open the Leads (CR3010PL) form.
2. In the table, click the lead record that you want to assign to an owner.

The [*Leads*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ce564fa0-baca-4d9b-97a8-ec69910de4c2)(CR301000) form opens. The form is filled in with the data of the selected lead.

1. If needed, in the **Workgroup** box on the **CRM Info** tab, select the workgroup to which the lead will be assigned.
2. In the **Owner** box in the Summary area of the form, select the employee to whom you want to assign the lead. If a workgroup is specified in the **Workgroup** box on the **CRM Info** tab, the list of the employees available for selection is limited to those included in the selected workgroup.
3. On the form toolbar, click **Save**.

## To Assign Multiple Leads to Owners

1. Open the [*Assign Leads*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6050aed6-5c5d-48c5-8769-490edfd792f1) (CR503010) form.
2. On the **All Records** filter tab, click the header of the **Owner** column, select the *Is Empty* filter condition, and click **OK** to filter unassigned leads.
3. Do one of the following:
	* To assign particular leads, in the unlabeled column, select the check boxes for the leads that you want to assign, and then click **Process** on the form toolbar.
	* To assign all listed leads, click **Process All** on the form toolbar.

# Managing Emails, Tasks, and Activities

This chapter contains instructions related to managing emails, tasks, and activities in Acumatica ERP.

## To Create an Email

1. Open the Leads (CR2040PL), Contacts (CR3020PL), Business Accounts (CR3030PL), Opportunities (CR3040PL), Cases (CR3060PL), Marketing Lists (CR2040PL), or Marketing Campaigns (CR3040PL) form.
2. In the table, click the record for which you want to create an associated email.
3. On the **Activities** tab, click **Create Email**.
4. In the [*Email Activity*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=5f2ec363-ec67-4dce-ae28-1158b6dd8ef3) (CR306015) form, which opens in a pop-up window, do the following:
	1. In the **To** box, specify the lead's email address.
	2. In the **Subject** box, specify an email subject.
	3. On the **Message** tab, type the text of the email body.
5. On the form toolbar, click **Send**.

## To Create an Event

1. Open the Leads (CR3010PL), Contacts (CR3020PL), Business Accounts (CR3030PL), Opportunities (CR3040PL), Cases (CR3060PL), Marketing Lists (CR2040PL), or Marketing Campaigns (CR2020PL) form.
2. In the table, click the record for which you want to create an associated event.
3. On the **Activities** tab, click **Create Event**.
4. In the [*Event*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b273921f-f49a-4011-bb75-08110d951f5f) (CR306030) form, which opens in a pop-up window, do the following:
	1. On the **Details** tab, specify the following settings:
		* **Summary**: A brief description of the event.
		* **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.
	2. On the **Attendees** tab, add the employees whom you want to invite to the event.
	3. On the form toolbar, click **Save**.
	4. Click **Invite All** on the table toolbar.

Invitations to the event are sent by email to the listed employees.

## To Create a Task

1. Open the Leads (CR3010PL), Contacts (CR3020PL), Business Accounts (CR3030PL), Opportunities (CR3040PL), Cases (CR3060PL), Marketing Lists (CR2040PL), or Marketing Campaigns (CR2020PL) form.
2. In the table, click the record for which you want to create a task.
3. On the **Activities** tab, click **Create Task**.
4. In the [*Task*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6449513c-254e-4093-b7b8-06de0108c384) (CR306020) form, which opens in a pop-up window, do the following:
	1. On the **Details** tab, specify the following settings:
		* **Summary**: A brief description of the task.
		* **Start Date**: If needed, the date when the task should be started.
		* **Due Date**: If needed, the date by which the task should be completed.
		* **Completion (%)**: If needed, the percent of the task completion.
		* **Workgroup**: If needed, the workgroup with which the task is to be associated.
		* **Owner**: The employee who is responsible for this task.
		* **Reminder**: Selected if you want a reminder about the task to be sent to the owner.
		* **Remind at**: The date and time when the owner should be reminded about the task.
		* If needed, in the editor area, type your comments or any other information related to the task.
	2. On the form toolbar, click **Save & Close**.

## To Create an Activity

1. Open the Leads (CR3010PL), Contacts (CR3020PL), Business Accounts (CR3030PL), Opportunities (CR3040PL), Cases (CR3060PL), Marketing Lists (CR2040PL), or Marketing Campaigns (CR2020PL) form.
2. In the table, click the record for which you want to create an activity.
3. On the **Activities** tab, click **Create Activity** and in the menu that opens, select the type of activity that you want to create.
4. The [*Activity*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=09cd2553-0e9e-4450-804d-106159f9a5b6) (CR306010) form opens in a pop-up window.
	1. In the Summary area, do the following:
		* In the **Summary** box, type a brief description of the activity.
		* If you want the activity to be hidden from external users, select the **Internal** check box.
		* If needed, in the **Date** box, specify the start date for the activity.
		* If needed, in the **Workgroup** box, select the workgroup to which the activity is to be assigned.
		* If needed, in the **Owner** box, specify the username of the employee who is responsible for the activity.
		* If needed, in the **Task** box, select the parent task or event for this activity.
	2. If needed, in the editor area, type your comments or any other information related to the activity.
	3. On the form toolbar, click **Save**.

## To Create a Billable Activity

1. Open the Leads (CR3010PL), Contacts (CR3020PL), Business Accounts (CR3030PL), Opportunities (CR3040PL), Cases (CR3060PL), Marketing Lists (CR2040PL), or Marketing Campaigns (CR2020PL) form.
2. In the table, click the record for which you want to create an activity.
3. On the **Activities** tab, click **Create Activity** and in the menu that opens, select the type of activity that you want to create.
4. The [*Activity*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=09cd2553-0e9e-4450-804d-106159f9a5b6) (CR306010) form opens in a pop-up window.
	1. In the Summary area, do the following:
		* In the **Summary** box, type a brief description of the activity.
		* If you want to hide the activity from external users, select the **Internal** check box.
		* If needed, in the **Date** box, adjust the start date and time of the activity.
		* In the **Owner** box, select the employee who will be responsible for the activity.
		* Select the **Track Time** check box.
		* If needed, in the **Status** box, select the status that will be assigned to the new activity.
		* In the **Earning Type** box, select the earning type that determines how the activity owner's labor will be cost.
		* In the **Time Spent** box, specify the total time spent on the activity.
		* Select the **Billable** check box to mark the activity as billable.
		* In the **Billable Time** box, specify the billable part of the time spent on the activity.
		* In the **Project** box, select one of the following:
			+ The project to which the activity relates.
			+ The non-project code, if the activity does not relate to any project.
		* In the **Project Task** box, select the project task that will be associated with the activity, if in the **Project** box you selected the project.

If an approver is assigned to the project task, the activity will also have to be approved by this person; otherwise, you will not be able to bill the time reported for this activity. The name of the employee authorized to approve the activity appears in the **Approver** read-only box.

* + - In the **Cost Code** box, select the cost code with which this activity will be associated to track project costs and revenue, if in the **Project** box you selected the project.
	1. On the form toolbar, click **Save & Close**.