**Job Aids**

Customer Service Representative 2021 R2

**Contents**

[Managing Cases 3](#_Toc93579775)

[To Create a Case 4](#_Toc93579776)

[To Assign a Case to an Owner 5](#_Toc93579777)

[To Assign Multiple Cases to Owners 6](#_Toc93579778)

[To Close a Case 7](#_Toc93579779)

[To Release an Individual Case 8](#_Toc93579780)

[To Release Multiple Cases 9](#_Toc93579781)

[Managing Contacts 10](#_Toc93579782)

[To Create a Contact 11](#_Toc93579783)

[To Convert a Lead to a Contact 12](#_Toc93579784)

[Managing Emails, Tasks, and Activities 13](#_Toc93579785)

[To Create an Email 14](#_Toc93579786)

[To Create an Event 15](#_Toc93579787)

[To Create a Task 16](#_Toc93579788)

[To Create an Activity 17](#_Toc93579789)

[To Create a Billable Activity 18](#_Toc93579790)

# Managing Cases

This chapter contains instructions related to managing cases in Acumatica ERP.

## To Create a Case

1. Open the [*Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=a492a091-9649-4826-bcc3-dccdf8765efd) (CR306000) 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 **Class ID** box, select the case class on which your case will be based.
   2. In the **Business Account** box, select the customer that is associated with the case and that will be billed for case resolution.
   3. In the **Contact** box, select the customer representative who should be contacted about the case.
   4. In the **Owner** box, select the employee of your company to whom you want to assign the case. If a workgroup has been specified on the **Additional Info** tab, you can select a user only from the list of the group members.
   5. In the **Subject** box, type a brief description of the case.
2. On the **Additional Info** tab, do the following:
   1. In the **Contract** box, select the contract that you want to be associated with the case.
   2. Select the **Billable** check box if you want the case to be billable.
   3. If needed, in the **Workgroup** box, select the workgroup to be associated with the case. (If you have already selected an owner who is not included in this workgroup, the **Owner** box will be cleared.)
3. On the **Details** tab, in the Message box, type a detailed description of the case.
4. On the form toolbar, click **Save**.

## To Assign a Case to an Owner

1. Open the Cases (CR3060PL) form.
2. On the **All Records** filter tab, click the case record that you want to assign to an owner. The [*Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=a492a091-9649-4826-bcc3-dccdf8765efd) (CR306000) form opens. The form is filled in with the data of the selected case.
3. On the form toolbar, click **Open**.
4. In the **Details** dialog box, which opens, specify the following settings:
   1. In the **Reason** box, select the reason for the status change (for example, *In Process*).
   2. In the **Owner** box, select the employee to whom you want to assign the case.
   3. Click **OK**.

## To Assign Multiple Cases to Owners

1. Open the [*Assign Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6d14d4e2-da51-4ef8-a9af-09f6fc55980c) (CR503210) form.
2. Click the header of the **Owner** column and select the *Is Empty* filter condition to filter unassigned cases.
3. Do one of the following:
   * To assign particular cases, in the unlabeled column, select the check boxes for the cases that you want to assign, and then click **Process** on the form toolbar.
   * To assign all listed cases, click **Process All** on the form toolbar.

## To Close a Case

1. Open the Cases (CR3060PL) form.
2. On an appropriate filter tab, find and click the reference number of the case that you want to close.

The [*Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=a492a091-9649-4826-bcc3-dccdf8765efd) (CR306000) form opens. The form is filled in with the data of the selected case.

1. On the form toolbar, click **Close**.
2. In the **Details** dialog box, which opens, do the following:
   1. In the **Reason** box, select the reason the case has been closed (for instance, *Resolved*).
   2. Click **OK**.

## To Release an Individual Case

1. Open the Cases (CR3060PL) form.
2. On an appropriate filter tab, find and click the reference number of the case that you want to release.

The [*Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=a492a091-9649-4826-bcc3-dccdf8765efd) (CR306000) form opens. The form is filled in with the data of the selected case.

1. On the form toolbar, click **Release**.

## To Release Multiple Cases

1. Open the [*Release Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=c3e683bf-4182-44dc-b87c-7ad5931c34bb) (CR507000) form.
2. Do one of the following:
   * To release certain cases, in the unlabeled column, select the check boxes for the cases that you want to release, and then click **Process** on the form toolbar.
   * To release all listed cases, click **Process All** on the form toolbar.

# Managing Contacts

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

## 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**.

# 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**.