



Acumatica

The Cloud **ERP**

Sales Operations

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ERP Implementation Consultant

Timing and Agenda

November 18, 2024 -10:00-11:30 AM PT

Day 1

Lesson 1: Qualifying Sales Leads

Lesson 1.1: Qualifying Leads by Sales Teams

Lesson 1.2: Creating Business Accounts

Lesson 1.3: Creating Contacts

Lesson 1.4: Managing Emails and Activities (partly)

November 19, 2024 -10:00-11:30 AM PT

Day 2

Lesson 1.4: Managing Emails and Activities (partly)

Lesson 2: Managing Opportunities

Lesson 2.1: Creating Opportunities

Lesson 2.2: Assigning Opportunities to Owners and Workgroups

Lesson 2.3: Managing Events

Timing and Agenda

November 20, 2024 -10:00-11:30 AM PT

Day 3

Lesson 2.4: Managing Opportunities

Lesson 2.5: Managing Relations



Day 1

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- **SweetLife Head Office and Wholesale Center:** This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- **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. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- **SweetLife Service and Equipment Sales Center:** This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

Operational Activity

The company has been operating starting in the 01-2024 financial period. In November 2024, 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. The equipment center has begun its operations in 01-2025 in response to the company's growth.

The base currency of the company and its subsidiaries is the US dollar (USD). All amounts in documents and reports are expressed in US dollars unless otherwise indicated.

SweetLife Company Sales and Services

Each SweetLife company's branch has its own business processes, as follows:

- **SweetLife Head Office and Wholesale Center:** In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- **SweetLife Store:** In the store, 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).
- **SweetLife Service and Equipment Sales Center:** This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

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 and juicer parts from large juicer vendors, and it either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

Lesson 1.1: Qualifying Leads by Sales Teams

Learning Objectives

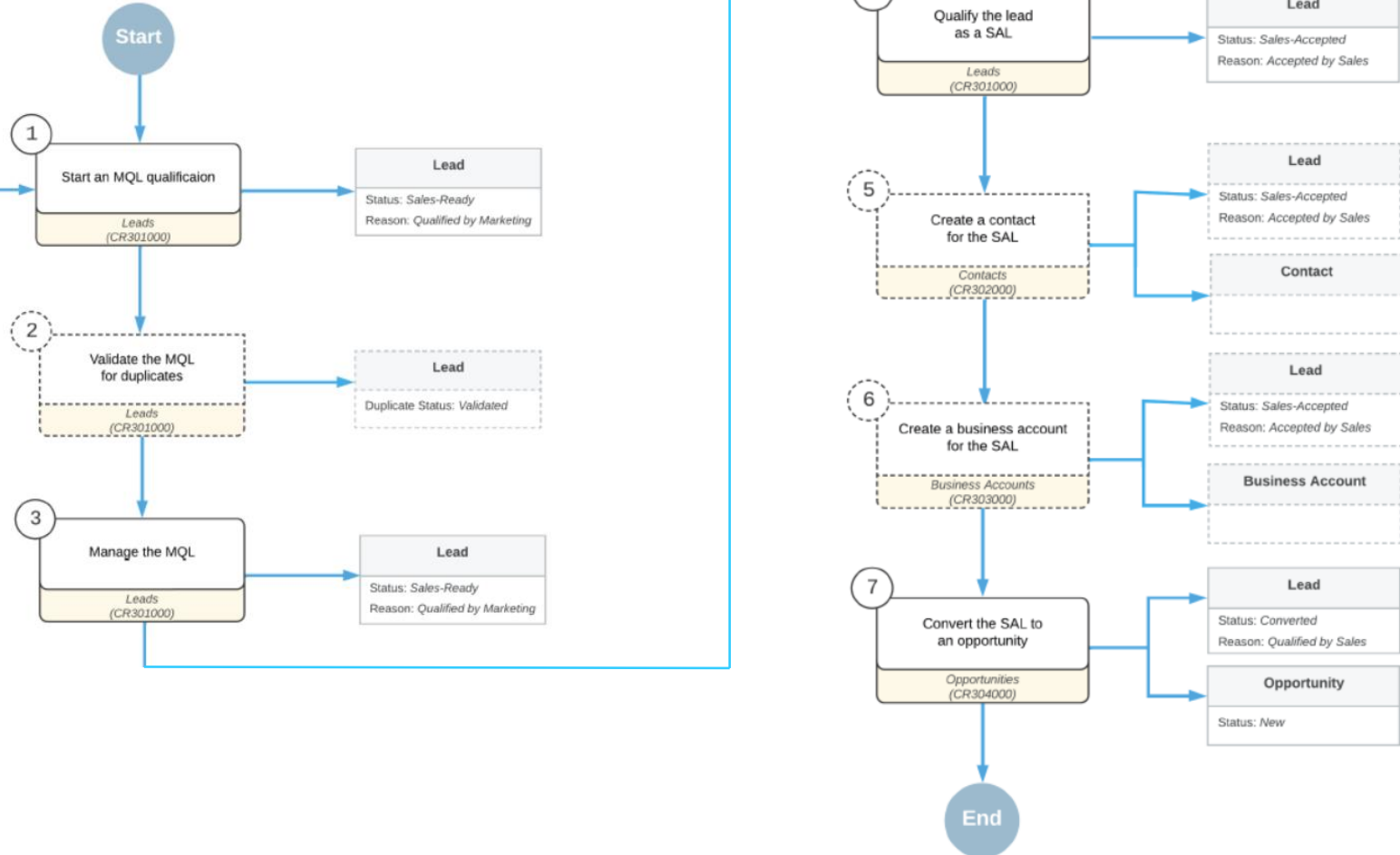
In this lesson, you will learn how to do the following:

- Use the lead statuses in Acumatica ERP in your lead qualification workflow
- Return a lead to marketing for further nurturing
- Convert a lead to an opportunity

Lead qualification workflow (sales)

All actions on this diagram are performed by a user with the same job role.

Job titles may vary across companies; some jobs can be performed automatically.



Lead Qualification by Sales Teams: To Convert a Lead to an Opportunity

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have obtained a lead from the marketing team, which has qualified the lead and your manager has assigned the lead to you.

Christina Taylor, a manager at SweetTooth Cafe, visited the company's official website, chose a pro series juicer made by Squeezeo Inc., and would like to buy the juicer. You need to get in touch with the lead and find out if Christina is interested in the product. If so, you need to convert the lead to an opportunity.

The business account, contact, and opportunity associated with the lead

[Leads](#)

NOTESFILESTOOLS

Christina Taylor - SweetTooth Cafe

←↶⏏↷+🗑️📋⏮️⏪⏩⏭OPEN⋮

DOCUMENTUSER-DEFINED FIELDS

Lead ID:Christina Taylor

Status:Converted

Reason:Qualified by Sales

Description:Sale of JUICER10

Contact:Christina Taylor

Business Account:SWEETTOOTH - SweetTooth Cafe

Owner:Bill Owen

Source:Other

Source Campaign:

Duplicate:Validated

CONTACT INFOACTIVITIESCRM INFOATTRIBUTESRELATIONSCAMPAIGNSMARKETING LISTSOPPORTUNITIES

↺+×⏮️⏭

All Records

🔍

📄	Role	Primary	Type	Document	Account	Name	Contact	Email	Add to CC
>	Derivative	<input type="checkbox"/>	Business Account	SWEETTOOTH, SweetTooth Cafe	SWEETTOOTH	SweetTooth Cafe	Christina Taylor		<input type="checkbox"/>
	Derivative	<input type="checkbox"/>	Contact	Christina Taylor	SWEETTOOTH	SweetTooth Cafe	Christina Taylor		<input type="checkbox"/>
	Derivative	<input type="checkbox"/>	Opportunity	000013, Sale of JUICER10	SWEETTOOTH	SweetTooth Cafe	Christina Taylor		<input type="checkbox"/>

Lead Qualification by Sales Teams: To Disqualify a Lead

Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have launched an advertising campaign to promote a new series of commercial juicers. The audience is a group of leads that have shown interest in these juicers. During the campaign, you have sent emails with the product descriptions and a survey to gauge the audience's interest in the products. John Livier, the head of the client services department at the Snow Park Restaurant, responded to your survey that the company is no longer interested in commercial juicers. Thus, you need to disqualify the John Livier lead.

Lesson 1.2: Creating Business Accounts

Learning Objectives

In this lesson, you will learn how to do the following:

- Become familiar with ways of creating business accounts
- Create a business account manually
- Specify a primary contact for the business account
- Process a business account as it has different statuses

Business Accounts: To Create a Business Account Manually

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have received an inquiry submitted via the company's website form by Debbie Euston, the assistant bakery manager at Delicious Crispy, a bakery that bakes pastries, usually with jam filling. Debbie is considering purchasing 100 jars of apple jam.

You have created the lead in the system, emailed the company's price list to Debbie, and called her, and Debbie confirmed her interest in purchasing the jam. You have created a contact, and now you need to create a business account in the system.

The primary contact for the business account

Business Accounts

DELICRISP - Delicious Crispy

NOTES FILES TOOLS

EXTEND AS CUSTOMER

* Business Account: DELICRISP - Delicious Crispy Owner: David Chubb

* Customer Status: Prospect Class: BAKERY - Bakeries

GENERAL CRM INFO ATTRIBUTES ACTIVITIES **CONTACTS** LOCATIONS SHIPPING RELATIONS LEADS

SET AS PRIMARY

Active	Contact	Job Title	Primary	Email	Phone 1
<input checked="" type="checkbox"/>	Debbie Euston	Assistant Bakery Manager	<input type="checkbox"/>	debbie.euston@deliciouscrispy.example.com	+1-416-555-0102
<input checked="" type="checkbox"/>	Patrick Roberts	Manager	<input checked="" type="checkbox"/>	p.roberts@deliciouscrispy.example.com	

Lesson 1.3: Creating Contacts

Learning Objectives

In this lesson, you will learn how to do the following:

- Become familiar with ways of creating contacts
- Create a contact manually
- Create a contact by using the Acumatica ERP mobile app

Contacts: To Create a Contact Manually

Story

You have received a call from Thomas Jones, the bakery manager at Pro Muffin, a bakery that cooks pastries, usually with jam filling. Thomas is considering purchasing 100 jars of cherry jam. You have created the lead in the system, converted the lead to an opportunity, and started negotiating the deal. Thomas asks you to discuss the financial details of the deal with his colleague Tina Parker, a finance manager, and gives you her contact details. You need to create a contact in the system and associate the contact with the opportunity created for Pro Muffin.

The contact associated with the opportunity

Opportunities

NOTESFILESTOOLS

000006 - Sale of 100 jars of cherry jam to Pro Muffin

OPENCREATE QUOTE...

Opportunity ID:000006

Status:New

* Class ID:PRODUCT - Product Sales

Stage:Prospect

* Estimated Close Date:

* Subject:Sale of 100 jars of cherry jam to Pro Muffin

Business Account:PROMUFFIN - Pro Muffin

* Location:MAIN - Primary Location

Contact:Thomas Jones

Owner:

☐ Manual Amount

Amount:0.00

Discount:0.00

Tax Total:0.00

Total:0.00

ACTIVITIESDETAILSQUOTESCONTACTCRM INFOFINANCIALSHIPPINGATTRIBUTESRELATIONSTAXES

All Records

Role	Primary	Type	Document	Account	Name	Contact	Email	Add to CC
Source	<input type="checkbox"/>	Lead	Thomas Jones	PROMUFFIN	Pro Muffin	Thomas Jones	t.jones@promuffin.example.com	<input type="checkbox"/>
Decision Maker	<input type="checkbox"/>	Contact				Tina Parker	tina@promuffin.example.com	<input checked="" type="checkbox"/>

Contacts: To Create a Contact by Using the Acumatica Mobile App

Story

At the annual conference for food and beverage suppliers, you met with Eva Johnson, a new director of the supply chain at Storehut, a chain of supermarkets in New York. Storehut is a current SweetLife customer. You need to create a new contact in the system for your existing STOREHUT customer.

Lesson 1.4: Managing Emails and Activities

Learning Objectives

In this lesson, you will learn how to create an email, an activity of the Phone Call type, and a task.



Day 2

Emails and Activities: To Create an Email

Story

You have obtained contact information for Donna Coleman, a buyer at Yummy Supplies supermarket and created the Donna Coleman lead in the system. You need to email to Donna the company's special offer on fruits.

Emails and Activities: To Track a Phone Call

Story

You are currently working on a purchased list of cold leads (individuals or organizations who never contacted your organization or expressed any interest in your products or services), which includes the Tim Bonner lead. You need to call Tim Bonner, who is a procurement manager at Store Spark in New York, make sure that the lead represents an actual person at the company. You then need to track the results of the phone call in the system.

Emails and Activities: To Create a Task

Story

Donna Coleman, a buyer at Yummy Supplies supermarket, is searching for a new supplier of fresh fruit and would like to meet you in order to discuss the company's products and services. You need to prepare for the meeting with Donna and to create a task in the system that records the progress and the results of the preparation.

Lesson 2.1: Creating Opportunities

Learning Objectives

In this lesson, you will learn how to do the following:

- Become familiar with ways of creating opportunities
- Learn about the copying of the settings of contacts and business accounts to opportunities
- Develop a general understanding of the settings of opportunities
- Learn about address validation and enrichment through third-party providers
- Learn about opportunity statuses
- Learn about shipping settings in opportunities, sales quotes, sales orders, and invoices
- Create an opportunity through lead conversion
- Create an opportunity manually
- Create an opportunities by using the Acumatica ERP mobile app
- Create an opportunity with an item without an inventory ID

Opportunities: To Create an Opportunity Manually

Story

You have received a phone call from your customer Kevin Grey, who is a buyer at Groceriex, a chain of supermarkets in New York. Kevin would like to extend Groceriex's contract with SweetLife and purchase 50 pounds of each of the following fresh fruits: apples, kiwis, oranges, and lemons.

Opportunities: To Create an Opportunity with an Item Without an Inventory ID

Story

You have received a message from your customer Diane Doe, who is a procurement manager at the Delicious Energy restaurant in New York. Diana would like to buy a new juicer that can make pomegranate juice for the restaurant, and you discussed this deal with her last week. The expected sales price for this juicer is \$4300, and you have agreed to give the customer a \$50 discount. You have just received these new juicers in the warehouse, but they have not been added to the system yet. You want to add the opportunity to Acumatica ERP now.

Opportunities: To Create an Opportunity by Using the Acumatica Mobile App

Story

You are currently on a business trip and cannot use your laptop at the moment. Fred Robinson, a store manager at the Store Cart supermarket, has called you and asked you to place an urgent order for assorted teas (black, fruit, and green), 50 packs of each. You need to create an opportunity in Acumatica ERP.

Lesson 2.2: Assigning Opportunities to Owners and Workgroups

Learning Objectives

In this lesson, you will learn how to do the following:

- For an opportunity class, become familiar how the system determines the default owner it assigns to new opportunities of the class
- Learn how to assign an opportunity manually to a particular owner
- Learn how to assign a selected group of opportunities to owners or workgroups by using an opportunity assignment map

Opportunity Assignment to Owners and Workgroups: Process Activity

Story

You are going on vacation and you need to temporarily assign the opportunity you have started working on to your colleague, Pam Brawner.

You will also change the SERVICE opportunity class so that the user who creates a new opportunity is assigned to be its owner. Finally, you will mass-assign the unassigned opportunities of the PRODUCT and PROJECT opportunity classes to workgroups.

The mass-assignment of opportunities to workgroups

Assign Opportunities

TOOLS

PROCESS

PROCESS ALL

Lesson 2.3: Managing Events

Learning Objectives

In this lesson, you will learn how to create an activity of the Event type.

Emails and Activities: To Create an Event

Story

You have sent the company's price list to Donna Coleman, a buyer at Yummy Supplies supermarket. Donna has studied the price list and would like to discuss the company's offer on juicers. You want to invite your colleague Jeffrey Vega, who maintains juicers at SweetLife, to the call. Also, Donna wants to invite her colleague, Jim Berry, who maintains juicers at Yummy Supplies. Jim's email address is jim.berry@yummysupplies.example.com, and his contact information has not been added to Acumatica ERP yet. You need to schedule a conference call and invite Donna, Jeffrey, and Jim to the call.

Because you work in New York, your time zone is Eastern Time, which is Greenwich Mean Time (GMT) minus five hours.

A day before the call, Donna informs you that she will be on a business trip in Phoenix, and you need to adjust the time zone and choose the time that fits Donna's time zone, which is Arizona, Greenwich Mean Time minus seven hours.

Notifications to the potential attendees about the rescheduled event

Events CUSTOMIZATION ▾ TOOLS ▾

Employee: 🔍

[ALL RECORDS](#) TODAY THIS WEEK THIS MONTH NEXT WEEK >>

Event Status: All ▾ 🔍

Invitation Status: All ▾ Start Time: All ▾

Summary	Event Status	Owner	Invitation Status	Day
> @ D ... Juicers for Yummy Supplies	Open	David Chubb	Accepted	Tuesday

Event [Icons] COMPLETE CANCEL ...

DETAILS ATTENDEES **ACTIVITIES**

CREATE EMAIL CREATE ACTIVITY ▾ |<|> All Records ▾ 🔍

Type	Billable	* Summary	Cost Code	Status
Email	<input type="checkbox"/>	Rescheduling of Juicers for Yummy Supplies		Open
Email	<input type="checkbox"/>	Rescheduling of Juicers for Yummy Supplies		Open
Email	<input type="checkbox"/>	Rescheduling of Juicers for Yummy Supplies		Open
Email	<input type="checkbox"/>	Invitation to Juicers for Yummy Supplies		Open
Email	<input type="checkbox"/>	Invitation to Juicers for Yummy Supplies		Open
Email	<input type="checkbox"/>	Invitation to Juicers for Yummy Supplies		Open

The cancellation of the event

Event

Juicers for Yummy Supplies

NOTES FILES TOOLS ▾

← ↺ ↻ + 📎 ▾ 🗑

COMPLETE CANCEL ...

DETAILS

ATTENDEES

ACTIVITIES

↺ + × INVITE INVITE ALL |↔| ☒

Contact	Email	Comment	Optional	Invitation
> David Chubb	chubb@sweetlife.com		<input type="checkbox"/>	Accepted
	jim.berry@yummysupplies.example.com	Donna's colleague, a technician from Yummy Supp...	<input type="checkbox"/>	Canceled
Donna Coleman	d.coleman@yummysupplies.example.com		<input type="checkbox"/>	Canceled
Jeffrey Vega	jeff.vega@sweetlife.com		<input type="checkbox"/>	Canceled



Day 3

Lesson 2.4: Managing Opportunities

Learning Objectives

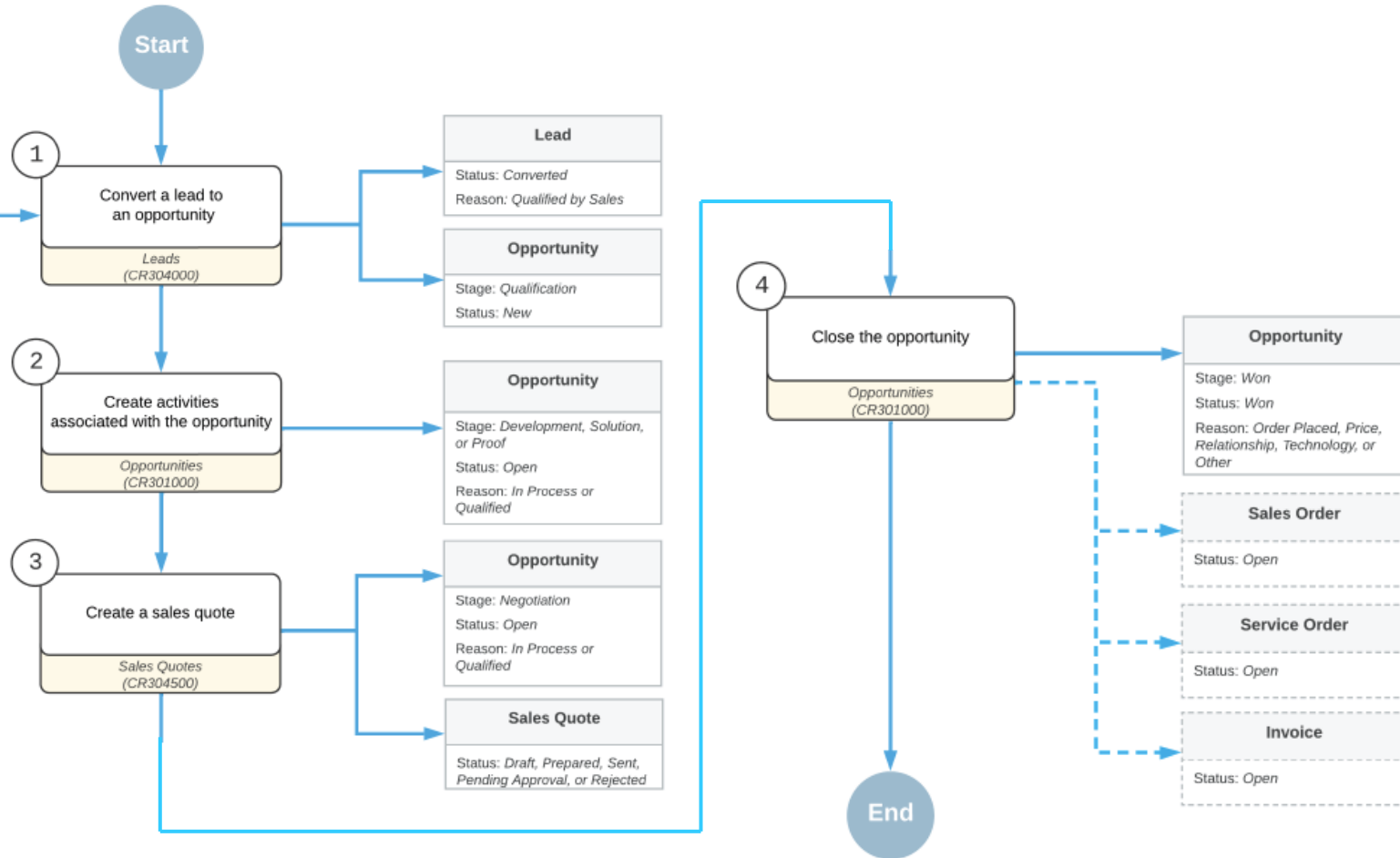
In this lesson, you will learn how to do the following:

- Make optimal use of the opportunity management capabilities of Acumatica ERP
- Use opportunity stages to reflect in the system the advancement of an opportunity through your sales pipeline
- Add products to an opportunity
- Create a sales quote
- Send the sales quote to a customer
- Select a primary quote for an opportunity
- Open and close opportunities and process them through stages
- Extend a business account of a prospect to be a customer
- Create a sales order for an opportunity
- Create an invoice for an opportunity
- Send a sales order to a customer

Management of an opportunity created through lead conversion

All actions on this diagram are performed by a user with the same job role.

Job titles may vary across companies; some jobs can be performed automatically.



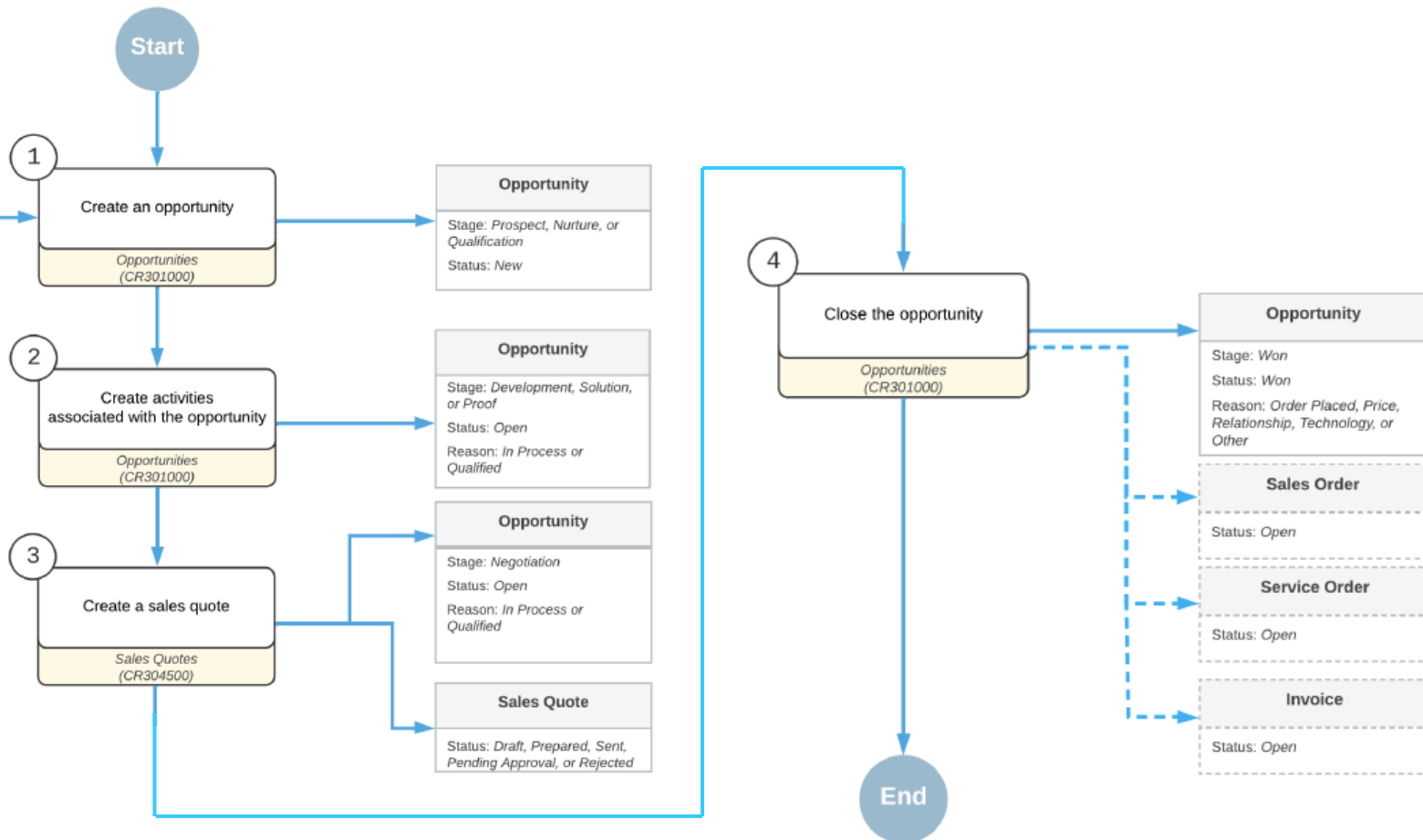
Management of a manually created opportunity

All actions on this diagram are performed by a user with the same job role.

Job titles may vary across companies; some jobs can be performed automatically.



Sales manager



Opportunity Management: To Add Products to an Opportunity

Story

Your customer, the Delicious Energy Restaurant chain, would like to purchase commercial juicers. You have discussed the purchase with Diane Doe, a procurement manager at Delicious Energy Restaurant, and have created the product demo. Now you need to add the details (in this case, products) of this order to the opportunity, which you have created in the system.

Opportunity Management: To Create a Sales Quote

Story

Your customer, the Cuisine Green Cafe chain in New York, would like to purchase juicers, and you have discussed the purchase with Roland Mercier, the cafe manager. You have created an opportunity in the system and added the details of the juicers to the opportunity. Now you need to create a sales quote to confirm the purchase with the customer and be sure both organizations are in agreement.

The sales quote set as the primary one

Sales Quotes

000011 Q000004 - 2. Sale of juicers to Cuisine Green Cafe

NOTES FILES TOOLS

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* Opportunity ID: 000011 - Sale of juicers to Cuisine Gre ⓘ

Quote Nbr.: Q000004 ⓘ ☒ Primary

Status: Draft

* Date: 10/20/2024 📅

Expiration Date: 📅

* Description: 2. Sale of juicers to Cuisine Green Cafe

Business Account: GREENCAFE - Cuisine Green Cafe ⓘ

* Location: MAIN - Primary Location ⓘ

Contact: Roland Mercier ⓘ

Owner: David Chubb ⓘ

☐ Manual Amount

Detail Total: 14,500.00

Line Discounts: 2,175.00

Document Discounts: 0.00

Tax Total: 0.00

Total: 12,325.00

DETAILS

CONTACT

FINANCIAL

SHIPPING

ACTIVITIES


RELATIONS

TAXES

APPROVALS

↻ + × ADD MATRIX ITEMS ⏪ ⏴ ⏵ ⏶

📄 ⓘ	📄	Inventory ID	Description	Free Item	Warehouse	Quantity	UOM	Unit Price	Ext. Price	Discount, %	Discount Amount
>	🔗 📄	JUICER10	Pro series juicer with a production rate of 1...	<input type="checkbox"/>	EQUIPHOUSE	3.00	PIECE	1,500.0000	4,500.00	15.000000	675.0000
>	🔗 📄	JUICER10C	Pro series citrus juicer with a production rat...	<input type="checkbox"/>	EQUIPHOUSE	5.00	PIECE	2,000.0000	10,000.00	15.000000	1,500.0000

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Opportunity Management: To Create an Opportunity-Based Sales Order

Story

Your potential customer, the Greenex Cafe, would like to purchase apple and orange jams, and both companies have agreed to the deal. You need to close the opportunity as won, extend the GREENEX business account as a customer, create a sales order based on the opportunity, and send the sales order to the customer.

The basic settings of the opportunity-based sales order

Opportunities

NOTESFILESTOOLS

000009 - Sale of jams to Greenex Cafe

← ↻ 📁 ↶ + 📄 ▾ 🗑️ ⏪ < > ⏩ OPEN ...

Opportunity ID:000009

Status:Won

Class ID:PRODUCT - Product Sales

Stage:Won

Estimated Close Date:10/20/2024

* Subject:Sale of jams to Greenex Cafe

Business Account:GREENEX - Greenex Cafe

Location:MAIN - Primary Location

Contact:Catherine Hoff

Owner:

☐ Manual Amount

Detail Total:405.70

Line Discounts:0.00

Document Discounts:0.00

Tax Total:0.00

Total:405.70

ACTIVITIESDETAILSQUOTESCONTACTCRM INFOFINANCIALSHIPPINGATTRIBUTESRELATIONSTAXES

↻ + × ⏮ ⏭

All Records

Role	Primary	Type	Document	Description	Status	Owner	Account
> Source	<input type="checkbox"/>	Lead	Catherine Hoff		Converted		GREENEX
Derivative	<input type="checkbox"/>	Sales Order	SO_000072	Sale of jams to Greenex Cafe	Open	David Chubb	GREENEX

Lesson 2.5: Managing Relations

Learning Objectives

In this lesson, you will learn how to do the following:

- Become familiar with a predefined set of roles that can be used for associated records
- Differentiate between a one-way role and a bidirectional role
- View roles added by the system on the Relations tab
- Manage relations on the Relations tab

Relations: Process Activity

Story

You have obtained a qualified lead from the marketing team, and your manager has assigned the lead to you. Kim Frey, a manager at the MyAvocado Lounge chain of restaurants, visited SweetLife's official website, chose a pro series juicer made by Squeezeo Inc., and would like to buy five juicers of this kind. You have contacted Kim Frey and she has confirmed her interested in the product. You have also discussed the financial terms of the deal with Erica Spencer, who is the director of operations at the MyAvocado Lounge chain of restaurants, and agreed to give the chain a 5% discount on the purchase. You need to do the following:

- Convert the lead to an opportunity
- Specify the decision maker for the deal in the opportunity
- Create a sales order based on the opportunity

The relations in the sales order

Sales Orders

SO 000073 - My Avocado

NOTES ACTIVITIES FILES TOOLS

← ↻ ⌨ ↶ + 🗑️ ⌵ ⏪ < > ⏩

QUICK PROCESS CREATE SHIPMENT HOLD ...

* Order Type:

SO

Order Nbr.:

000073

Status:

Open

* Date:

1/30/2024

* Requested On:

1/30/2024

Customer Ord...

External Refer...

* Customer:

MYAVOCADO - My Avocado

* Location:

MAIN - Primary Location

Contact:

Kim Frey

* Project:

X - Non-Project Code.

Description:

Sale of juicers (JUICER15) to MyAvocado

Ordered Qty.:

5.00

Detail Total:

12,500.00

Line Discounts:

625.00

Document Dis...

0.00

Freight Total:

0.00

Tax Total:

0.00

Order Total:

11,875.00

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS TOTALS

↻ + × ⇄ ☒

All Records

Role	Primary	Type	Document	Description	Account	Contact
> Source	<input type="checkbox"/>	Opportunity	000018_Sale of juicers (JUIC...	Sale of juicers (JUICER15) to MyAvoc...	MYAVOCADO	Kim Frey

Invoices and Memos

Customer Details



Thank you!

Varughese Thomas