



Acumatica

The Cloud ERP

CRM Support Operations

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Timing and Agenda

July 23, 2024 -10:00-11:00 AM PT

Day 1

Lesson 1: Creating Cases

Lesson 2: Assigning Cases to Owners and Workgroups

July 24, 2024 -10:00-11:00 AM PT

Day 2

Lesson 3: Managing Cases

Lesson 4: Submitting Cases to Internal Teams



Day 1

Lesson 1: Creating Cases

Learning Objectives

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

- Become familiar with the ways of creating cases in Acumatica ERP
- Develop a general understanding of case settings
- Create a case manually

Cases: To Create a Case Manually

Story

Suppose that you are a customer service representative of the SweetLife Fruits & Jams company. You have received a phone call from your customer, Kevin Grey, who is a buyer at the Groceriex chain of supermarkets in New York.

Kevin ordered 25 jars each of apple, orange, and cherry jam, but only 15 jars of orange jam were delivered. (The other jams were delivered in full.) You need to arrange the delivery of 10 jars of orange jam to Groceriex within three working days.

Figure: The case based on the customer's request

Cases

000014 - Delivery of the missing 10 jars of orange jam

NOTES FILES TOOLS

OPEN TAKE CASE ...

DOCUMENT USER-DEFINED FIELDS

Case ID:	000014	* Business Account:	GROCERIEX - Groceriex	Reported On:	2/5/2024 9:09 AM
* Case Class:	DELIVERY - Sale and delivery of prod	Location:	MAIN - Primary Location	Severity:	Low
Status:	New	* Contact:	Kevin Grey	Priority:	Medium
Reason:	Unassigned	Owner:		Resolution Due:	2/10/2024 9:09 AM
* Subject:	Delivery of the missing 10 jars of orange jam				

DETAILS CRM INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS CLOSURE NOTES

VISUAL Paragraph B I U A INSERT LAYOUT TABLES

10 jars of orange jam were not delivered to GROCERIEX

Lesson 2: Assigning Cases to Owners and Workgroups

Learning Objectives

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

- Assign a case manually to a particular owner
- Assign a selected group of cases to owners or workgroups by using a case assignment map

Case Assignment to Owners and Workgroups: Process Activity

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. You have received a phone call from your customer, Delicious Energy Restaurant, about the repair of a juicer. You have created a case and need to assign the case to your colleague, Jeffrey Vega, who is a technician in SweetLife.

Further suppose that later that day you have checked the cases in your system and noticed that a few of them were not assigned to owners and workgroups. You need to assign these unassigned cases to the appropriate owners and workgroups.

Figure: The cases that have been assigned to owners and workgroups

Assign Cases ☆ TOOLS ▾

🔄 ↶ PROCESS PROCESS ALL 🕒 ⏪ ☒ 🔍

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Case ID	Subject	Status	Reason	Owner	Workgroup
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000003	Billing plan	Open	In Process	Alberto Jimenez	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000004	Statement request	New	Unassigned	Alberto Jimenez	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000005	Repair of a juicer for Delicious Energy Rest...	New	Unassigned	Jeffrey Vega	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000006	Delivery of missing parts for JUICER05C to...	New	Unassigned		Delivery
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000007	Questions about specification of JUICER20C	New	Unassigned	David Chubb	
>	<input type="checkbox"/>	<input type="checkbox"/>	000008	Repair of JUICER15	New	Unassigned		Technical Supp...
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000009	Request for compatibility of accessories	New	Unassigned	David Chubb	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000010	Request for juicer repair from Storehut	New	Unassigned	Jeffrey Vega	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000011	Which vegetables can be juiced by using J...	Open	In Process	Jeffrey Vega	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000012	Delivery of the missing 10 jars of orange jam	New	Unassigned		Delivery



Day 1



Cherry Lake Tree Farm
Acumatica Customer

Lesson 2: Assigning Cases to Owners and Workgroups

Learning Objectives

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

- Make optimal use of the case management capabilities of Acumatica ERP
- Develop a general understanding of billing settings for a case and case-related activities
- Process a case and notice its statuses
- Create an email and an activity associated with a case
- Reassign a case to another owner
- Escalate a case to another employee

Lesson 2: Assigning Cases to Owners and Workgroups

Learning Objectives

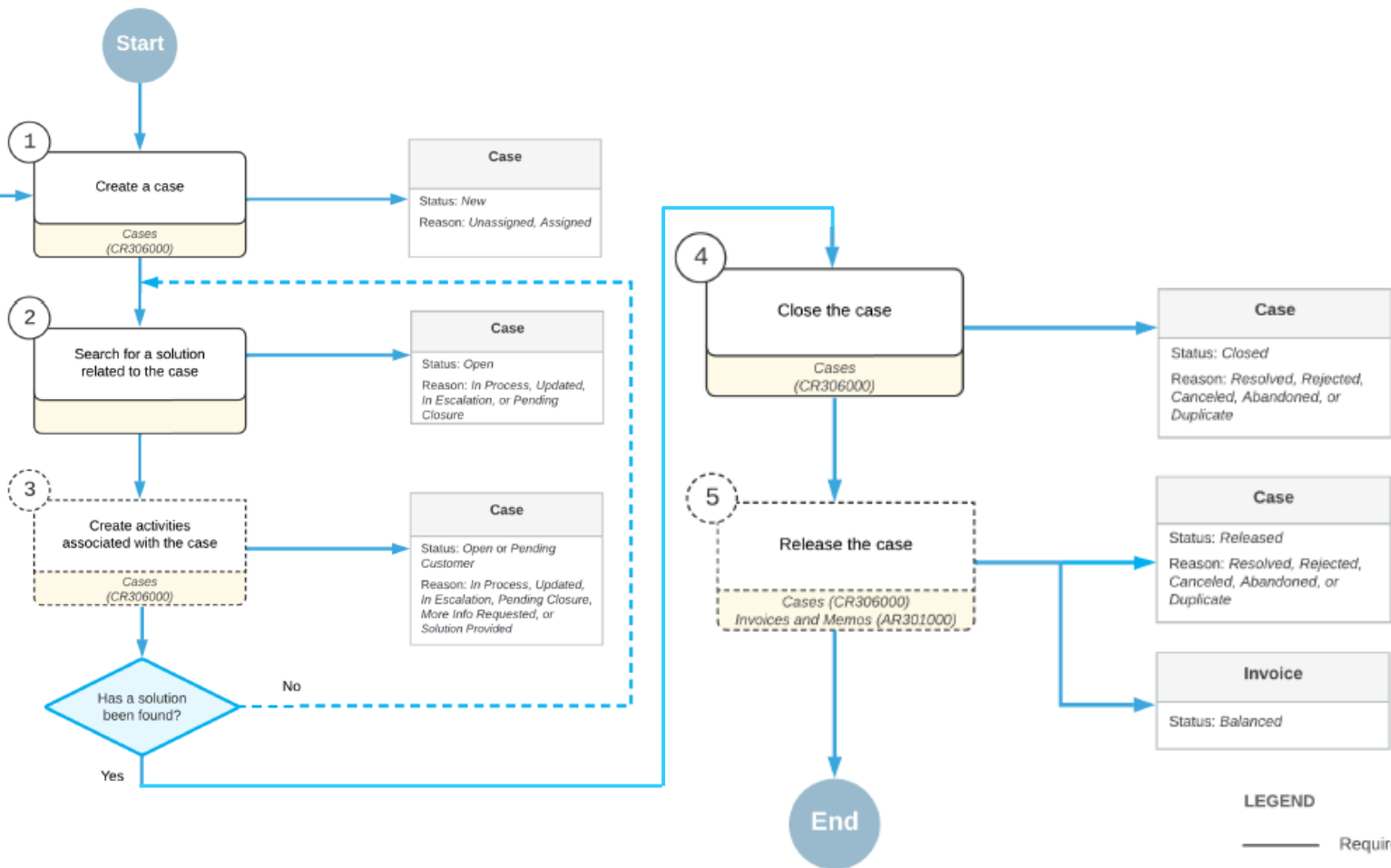
In this lesson, you will learn how to do the following:

- Specify a case-related activity with a solution for a case
- Create a return order from a case
- Become familiar with ways of associating a case with other cases
- Prepare and review an accounts receivable invoice for a case

Case processing workflow

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

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



LEGEND

- Required action
- - - - - Optional action

Case Management: To Process a Non-Billable Case

Story

Suppose that you are Jeffrey Vega, a technician at the SweetLife Fruits & Jams company. David Chubb, a sales manager, has created a case in the system based on a phone call from Chuck Hester, who is a purchase manager at Fruitland, a store in Baltimore. Chuck Hester is thinking of purchasing a commercial juicer from SweetLife, and Fruitland has a number of accessories for a similar juicer. Chuck needs to know if these accessories (the feeder kit and the peel ejector kit) suit the juicer that he might buy.

Figure: The closed non-billable case

Cases

000009 - Request for compatibility of accessories

NOTES FILES TOOLS

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DOCUMENT USER-DEFINED FIELDS

Case ID:	000009	Business Account:		Reported On:	12/8/2024 6:47 AM
Case Class:	PRESALE - Pre-sales requests from pote	Location:		Severity:	Medium
Status:	Closed	Contact:	Chuck Hester	Priority:	Medium
Reason:	Resolved	Owner:	Jeffrey Vega	Closed On:	3/18/2024 12:30 PM
Subject:	Request for compatibility of accessories				

DETAILS CRM INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS CLOSURE NOTES

Jeff,
Please check if the feeder kit and the peel ejector kit suitable for JUICER10 will suit for JUICER10C.
Thanks.

Case Management: To Process a Billable Case

Story

You have received by email a request for the repair of a juicer from your customer Tonya Lawrence, a buyer at Storehut, a chain of supermarkets in New York. You have created a case in the system based on the email from Tonya and assigned the case to yourself. You need to repair the juicer, record the results of the repair in the system, and release the case for billing, causing an invoice to be created for the fixing of the juicer.

Figure: The case-based invoice

Invoices and Memos

Invoice 000118 - Storehut

NOTES ACTIVITIES FILES TOOLS

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Type:	Invoice	Customer:	STOREHUT - Storehut	Detail Total:	157.50
Reference Nbr.:	000118	Location:	MAIN - Primary Location	Line Discounts:	0.00
Status:	Balanced	Terms:	30D - 30 Days	Document Dis...:	0.00
Date:	1/30/2024	Due Date:	2/29/2024 <input type="checkbox"/> Apply Retainage	Retained Amo...:	0.00
Post Period:	01-2024	Cash Discount...:	2/29/2024 <input type="checkbox"/> Pay by Line	Tax Total:	0.00
Customer Ord...:		Project/Contract:	X - Non-Project Code.	Balance:	157.50
				Cash Discount:	0.00

Description: Request for juicer repair from Storehut

DETAILS FINANCIAL ADDRESSES TAXES APPLICATIONS COMPLIANCE

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Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount
TECHNICIAN	Request for juicer repair from Storehut	3.50	HOUR	45.0000	157.50	0.000000	0.00

Lesson 4: Submitting Cases to Internal Teams

Learning Objectives

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

- Become familiar with the ways of creating internal cases in Acumatica ERP for submittal to employees of internal teams
- Create an internal case manually and assign the case to a member of an internal team

Case Submittal to Internal Teams: Process Activity

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You want to track information in opportunities about the customer's company size and its number of employees. You need to submit an internal case to system administrator Kimberly Gibbs. In the case, you will ask Kimberly to add two custom UI elements on the Opportunities (CR304000) form.



Thank you!

Chris Pelton