End-User Course

CRM

Marketing Operations 2025 R1

Revision: 4/7/2025

Acumatica
The Cloud ERP

Contents

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How to Use This Course

This course introduces you to the Acumatica ERP CRM functionality based on a set of examples that illustrate CRM marketing processes in a midsize company. The course consists of the lessons that guide you step by step through the examples and explanations of the CRM marketing process flow in Acumatica ERP.

What Is in This Guide

The guide includes the *Company Story* topic and process activities. *Company Story* explains the organizational structure of the company preconfigured in the *U100* dataset, as well as the company's business processes and requirements. Each of the process activities of the course is dedicated to a particular user scenario and consists of processing steps that you complete.

> The process activities are independent and can be completed in any order.

Which Training Environment You Should Use

All lessons of the course should be completed in an instance of Acumatica ERP 2025 R1 with the *U100* training dataset preloaded; this dataset provides the predefined settings and entities you will need as you complete the activities of this course.

You or your system administrator should prepare an instance of Acumatica ERP 2025 R1, as described in the *How to Create a Tenant with the U100 Dataset* section below.

What Is in a Process Lesson

A *process lesson*—that is, a lesson dedicated to the performing of a particular business process—includes a brief user scenario and a description of the process workflow. It can also include process diagrams that illustrate the user scenario supported by this process. The lesson also provides a brief overview of the settings that need to be specified and the entities that need to be prepared in the system before you start to perform this business process.

Each process lesson includes at least one process activity that you have to complete in your Acumatica ERP instance to learn how to perform the described business process.

What the Documentation Resources Are

The complete Acumatica ERP documentation is available on *https://help.acumatica.com/* and is included in the Acumatica ERP instance. While viewing any form used in the course, you can click the **Open Help** button in the top pane of the Acumatica ERP screen to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related information and activities and to open a reference topic with detailed descriptions of the form elements.

How to Create a Tenant with the U100 Dataset

Before you complete this course, you need to add a tenant with the *U100* dataset to an existing Acumatica ERP instance. You will then prepare the tenant for completing the activities. To complete this preparation, perform the following instructions:

1. Go to *Amazon Storage*.
2. Open the folder that corresponds to the version of your Acumatica ERP instance.
3. In this folder, open the `Snapshots` folder and download the `u100.zip` file.
4. Launch the Acumatica ERP instance and sign in.

5. Open the *Tenants* (SM203520) form and click **Add New Record** on the form toolbar.
6. In the **Login Name** box, type the name to be used for the tenant.
7. On the form toolbar, click **Save**.

> When you create a system tenant, you may be signed out after its creation, depending on how many non-System tenants your Acumatica ERP instance already had:
>
> - If you started with one non-System tenant (to which you are signed in) and you create a new one, the system signs you out to switch from single-tenant mode to multitenant mode.
> - If the instance had multiple non-System tenants and you create another, it is already in multitenant mode. Instead of being signed out, you wait until the system completes the operation and then proceed.

8. On the **Snapshots** tab, click **Import Snapshot**.
9. In the **Upload Snapshot Package** dialog box, select the `u100.zip` file, which you have downloaded, and click **Upload**.

   The system uploads the snapshot and lists it on the **Snapshots** tab of the *Tenants* form.
10. Open the *Apply Updates* (SM203510) form and click **Schedule Lockout**.
11. In the **Schedule Lockout** dialog box, click **OK**.
12. Open the *Tenants* form again.
13. On the form toolbar, click **Restore Snapshot**.
14. If the **Warning** dialog box appears, click **Yes**.
15. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded and click **OK**. The system will restore the snapshot and sign you out.
16. Sign in to the tenant that you have just created.
17. Open the *Apply Updates* form again.
18. On the form toolbar, click **Stop Lockout.**

Which Credentials You Should Use

You complete all lessons of this course by using the *owen* user and the *123* password.

Which License You Should Use

For the educational purposes of this course, you use Acumatica ERP under the trial license, which does not require activation and provides all available features. For the production use of this functionality, you have to activate the license your organization has purchased. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP licensing policy for details.

Company Story

This topic explains the organizational structure and operational activity of the company you will work with 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 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 began 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: Acquiring an Audience

In this lesson, you will learn how to create an audience of prospective customers and how you can maximize the quality of the audience in the system.

Lesson 1.1: Creating Leads

In this lesson, you will learn about different ways of creating leads in the system.

Leads: General Information

The processing of leads in Acumatica ERP starts with adding leads to the system. This topic provides information about lead creation in Acumatica ERP.

Learning Objectives

In this lesson, you will do the following:

- Become familiar with ways of creating leads
- Learn about lead classification
- Learn about the synchronization of settings in leads, contacts, and business accounts
- Create a lead manually
- Import leads from a purchased list
- Create a lead by using the Acumatica add-in for Outlook

Applicable Scenarios

You may want to learn how to create leads in Acumatica ERP in scenarios that include the following:

- You have obtained some contact information about a potential customer.
- You have acquired a list of cold leads (individuals or organizations who never contacted your organization or expressed any interest in your products or services) from a vendor or a public source.
- You have started working with the system and need to import your existing leads from your legacy system into Acumatica ERP.
- You have received an email from a potential customer.

Marketing Leads in Acumatica ERP

A marketing lead is contact information representing an individual or a company that has a potential interest in products or services your organization offers. Leads make up the organization's marketing audience, which is the target for marketing activities, such as marketing campaigns or advertisements.

A marketing manager defines the organization's marketing strategy, goals, and target audience, as well as acquiring and managing data on the marketing audience. When the audience data has been acquired, the marketing manager can create the needed leads in the system.

Lead Creation

Lead creation in Acumatica ERP consists of any of the following general steps:

- Creating leads manually
- Importing lead data from external sources

As soon as leads have been added to the system and checked for duplicates, as described in *Validating Records for Duplicates*, you can assign these leads to owners either one by one or through mass processing according to the rules that have been specified in the system, as described in *Assigning Leads to Owners and Workgroups*, and the owners start working on these leads.

In Acumatica ERP, you can create a lead in any of the following ways:

- By manually entering lead data on the *Leads* (CR301000) form. For detailed instructions, see *Leads: To Create a Lead Manually*.
- On the *Contacts* (CR302000) or *Business Accounts* (CR303000) form, if you click **Create Lead** on the More menu.
- By using import scenarios to import lists of leads on the *Import by Scenario* (SM206036) form. You can use the predefined *Import Leads from Excel* import scenario. For detailed instructions, see *Leads: To Import Leads from a Purchased List*.
- By uploading new leads from an Excel file on the *Marketing Lists* (CR204000) or *Marketing Campaigns* (CR202000) form. For details, see *Marketing Lists: General Information* and *Marketing Campaigns: General Information*.
- By creating a lead from the Acumatica add-in for Outlook based on the details of the selected email recipient or sender. For detailed instructions, see *Using the Acumatica Add-In for Outlook* and *To Create a Lead by Using the Acumatica Add-In*.
- By enabling integration with web services on the *Web Services* (SM207040) form for the automatic import of leads. For details, see *Web Service Endpoints*.
- By using the integration with HubSpot. For details, see *Integration with HubSpot*.
- By activating the functionality of incoming mail processing on the *Email Accounts* (SM204002) form for the automatic creation of leads based on information about the sender. For details, see *Incoming Mail Processing*.
- By using the Acumatica mobile app.

Contact Information

On the **Contact Info** tab of the *Leads* (CR301000) form, you can specify such contact-related settings as the name, contact information, and address of the selected lead. Also, the **Personal Data Privacy** section of this tab holds information about the lead's consent to the processing of personal data if the *GDPR Compliance Tools* feature is enabled on the *Enable/Disable Features* (CS100000) form. (For details about GDPR compliance tools, see *Handling Personal Data*.)

Synchronization of Settings in Leads, Contacts, and Business Accounts

In Acumatica ERP, you can easily synchronize the contact-related settings of a lead with the same settings in the contact and business account related to that lead. With this synchronization turned on, changes to the contact information of any of these entities causes the settings in the related entities to be updated as well.

> The synchronization or overriding of settings applies to all the settings on the **Contact Info** tab of the *Leads* (CR301000) form, all the settings on the **Details** tab of the *Contacts* (CR302000) form, and the contact and address settings (of the primary contact of the business account) on the **General** tab of the *Business Accounts* (CR303000) form.

You can synchronize contact information in leads, contacts, and business accounts by using the **Override** check box on the **Details** tab of the *Contacts* form as follows:

- If the check box is cleared and the business account related to the contact has not been extended as a customer or a vendor yet, the contact information of the contact on the *Contacts* form is synchronized with the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms, respectively, and can be updated in both directions. That is, if you update the contact and address settings on any of these forms, the settings will be also updated on the related forms.
- If the check box is cleared and the business account related to the contact has been extended as a customer or a vendor, the address settings of the contact on the *Contacts* form are read-only and can be updated automatically only in one direction, from the *Business Accounts* form to the *Contacts* form.
- If the check box is selected, the contact information for the selected contact on the *Contacts* form can differ from the contact information of the related lead and business account on the *Leads* and *Business Accounts* forms. If contact information is updated on any of these forms, the changes are not applied to the other forms.

Flexible Classification of Leads

In Acumatica ERP, you can easily categorize leads into different classes and gather different sets of additional information about leads of different classes. A lead class is a grouping entity for leads that can make the creation of leads faster and more accurate. When you create a new lead, the system can automatically assign a class to this lead and you can change the class as needed. For each class, you can create a set of attributes, which give users the ability to further classify leads within the class. An attribute is a characteristic or quality—such as number of employees, industry, or products and services a lead is interested in—that is important to your company but is not already tracked on the *Leads* (CR301000) form. For details, see *Defining Lead Classes*.

When a class for a lead has been selected, the attributes assigned to this class appear on the **Attributes** tab of the *Leads* form as additional elements that can be used to specify information about the lead.

Relations Between a Lead and Its Associated Records

As you work with a lead in Acumatica ERP, you can track the records associated with the lead on the **Relations** tab of the *Leads* (CR301000) form. For details, see *Managing Relations*.

Ability to Add User-Defined Fields to CRM Forms

User-defined fields are site-specific elements that have been defined to track information deemed as important to the organization. A customizer—a user with particular access rights in the system—can add user-defined fields to the *Leads* (CR301000), *Contacts* (CR302000), *Business Accounts* (CR303000), *Opportunities* (CR304000), *Sales Quotes* (CR304500), *Cases* (CR306000), *Activity* (CR306010), *Task* (CR306020), and *Event* (CR306030) form. From any of these forms, the customizer can open the *Edit User-Defined Fields* (CS205020) form by clicking **Manage User-Defined Fields** in the **Customization** menu on the form title bar and specify a set of user-defined fields for the form.

For a lead, contact, business account, opportunity, sales quote, and case, the set of user-defined fields is applicable to either a particular class of the entity or all classes of the entity. For a class, each user-defined field can be defined as required or hidden; also, a default value can be specified for the field.

If user-defined fields have been added for a data entry form of a lead, contact, business account, opportunity, sales quote, and case, the original information in the Summary area of a record's form is displayed on the **Document** tab. The added user-defined fields are displayed on the **User-Defined Fields** tab. On this tab, by using these fields, you can easily specify additional information about records they are working with. For details, see *Attributes* and *User-Defined Fields*.

Copying of User-Defined Fields Between Records

The values of user-defined fields can be copied between related records—such as CRM entities, project quotes, customers, and vendors—when a new record is created from an original one. For details, see *User-Defined Fields*.

If both records have the same user-defined fields on their respective **User-Defined Fields** tabs, the system automatically copies the field values from the original record to the new one.

The system also copies user-defined fields when a user creates any of the following new records from the noted starting point:

- A lead, opportunity, or case created by clicking the button on the table toolbar of the **Leads**, **Opportunities**, or **Cases** tab, respectively, of the *Business Accounts* or *Contacts* form
- A sales order or invoice created by clicking **Create Sales Order** or **Create Invoice** on the More menu of the *Opportunities* form
- A sales quote created by copying an existing one on the **Quotes** tab of the *Opportunities* form or by clicking **Copy Quote** on the More menu of the *Sales Quotes* form
- A project quote created by clicking **Copy** on the More menu of the *Project Quotes* (PM304500) form
- A service order created by clicking **Create Service Order** on the More menu of the *Cases* (CR306000) or *Opportunities* form
- An appointment created by clicking **Create Appointment** on the More menu of the *Opportunities* form

In addition, the system copies user-defined fields if a user creates a new record by using the following dialog boxes:

- **Create Contact** on the *Leads* (CR301000), *Business Accounts* (CR303000), *Opportunities* (CR304000), *Sales Quotes* (CR304500), *Customers* (AR303000), and *Vendors* (AP303000) forms. The set of user-defined fields is determined by the class of the new contact.
- **Create Account** on the *Leads*, *Contacts*, *Sales Quotes*, and *Opportunities* forms. The set of user-defined fields is determined by the class of the new account.
- **Create Opportunity** on the *Leads* form. The set of user-defined fields is determined by the class of the new opportunity.
- **Create Quote** on the *Opportunities* form. In this case, the set of user-defined fields is determined by the selected type of the quote (*Project Quote* or *Sales Quote*).

For a record that a user creates by using a dialog box, the user-defined fields that are required for the new record will appear on the **User-Defined Fields** tab of the dialog box, even if these fields were not specified in or required in the original record.

If a user-defined field is not required on the new record's form, it will not appear in the dialog box. However, if default values for the fields have been specified in the original record, then the system will copy the default values automatically to the new record.

The user can change the values in user-defined fields of any record at any time if the record's current status gives the user the ability to edit the settings' values in the record.

Additionally, the user can select values for the user-defined fields when merging duplicate records. For details, see *Record Validation for Duplicates: General Information*.

Leads: To Create a Lead Manually

The following activity demonstrates how to create a lead manually in Acumatica ERP.

Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You have received a call from Sam Collins, the bakery manager of Muffin Secret, a bakery that cooks pastries, usually with jam filling. Sam would like to purchase 50 jars each of apple, orange, and cherry jam and wonders what discount he can obtain from the SweetLife if he chooses to buy the jams.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, and gives users the ability to manage sales opportunities, contacts, marketing lists, and campaigns.
- On the *Lead Classes* (CR207000) form, the *BAKERY* class, which defines SweetLife's leads that represent bakery employees, has been created.
- On the *Leads* (CR301000) form, the **User-Defined Fields** tab, which holds the values of attributes, has been added, and the **Interested In** box has been added to the tab.

Process Overview

In this activity, you will create a lead on the *Leads* (CR301000) form.

System Preparation

Before you start creating leads manually, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded.
2. Sign in to the system as marketing manager Bill Owen by using the following credentials:
   - **Username**: *owen*
   - **Password**: *123*
3. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.
4. Make sure that on the *Customer Management Preferences* (CR101000) form, in the **Default Lead Class** box, *BAKERY* is specified. If it is not, select this lead class, and save your changes.

Step: Creating a Lead Manually

To create a lead manually, do the following:

1. On the *Leads* (CR301000) form, add a new record.
2. In the Summary area, do the following:
   a. In the **Description** box, add: `The bakery manager submitted an inquiry on the corporate website about a discount for 150 jars of apple, orange, and cherry jam`.
   b. In the **Source** box, select *Web*.
3. On the **Contact Info** tab, specify the following contact information for the lead:
   a. **First Name**: `Sam`
   b. **Last Name**: `Collins`

c. **Account Name**: `Muffin Secret`
d. **Job Title**: `Bakery Manager`
e. **Email**: `s.collins@muffin.secret.example.com`
f. **Business 1**: `+1 (212) 509-6005`
g. **Address Line 1**: `2359 Southern Street`
h. **City**: `New York`
j. **Country**: `United States of America`

4. On the **CRM Info** tab, in the **Lead Class** box, make sure that the *BAKERY* class is selected.
5. In the **User-Defined Fields** tab of the Summary area, in the **Interested in** box, select *Jam*.
6. On the form toolbar, click **Save**.

You have created the lead in the system. On the **Document** tab of the Summary area of the *Leads* form, you can see *Sam Collins* in the **Lead** box and *New* in the **Status** box.

Leads: To Import Leads from a Purchased List

The following activity demonstrates how to import a purchased list of leads to Acumatica ERP by using an import scenario.

Story

SweetLife uses purchased lists as sources of leads. The lists are imported into Acumatica ERP so that all records are stored in a single place, managed, and classified. You have acquired a new purchased list, `PurchasedLeadsStores.xlsx`, which has the contact information of employees at stores and supermarkets. You need to import these leads from the Microsoft Excel file to Acumatica ERP.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS101000) form, the *Customer Management* feature has been enabled.
- On the *Lead Classes* (CR207000) form, the *STORE* lead class has been added.
- On the *Data Providers* (SM206015) form, the *Import Leads from Excel* data provider has been added and configured.
- On the *Import Scenarios* (SM206025) form, the *Import Leads from Excel* import scenario has been configured. This scenario can be used for the import of leads from a Microsoft Excel file to Acumatica ERP. The *Import Leads from Excel* data provider is used for this import scenario. The imported leads will belong to the *STORE* lead class. For details, see *Configuring Import Scenarios*.

Process Overview

On the *Import by Scenario* (SM206036) form, you will select the *Import Leads from Excel* import scenario and then upload to the system the Microsoft Excel file with the purchased list of leads. After that, you will prepare the data so that the system validates the rows of records, and then you will initiate the import process.

System Preparation

Before you start importing leads from a purchased list to Acumatica ERP, do the following:

1. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.
2. Download the file *PurchasedLeadsStores.xlsx* to your computer.

Step 1: Importing Leads from a Purchased List

To import leads from the purchased list in the *PurchasedLeadsStores.xlsx* file, do the following:

1. Open the *Import by Scenario* (SM206036) form.
2. In the **Name** box of the Selection area, select *Import Leads from Excel*.
3. On the More menu, under **Processing**, click **Clear Data** to make sure that the history of scenario execution and prepared data has been cleared.
4. In the **Warning** dialog box, which opens, click **Yes**.
5. On the form title bar, click **Files**.
6. In the **Files** dialog box, which opens, do the following:
   a. Click **Browse**.
   b. In the window that opens, find the `PurchasedLeadsStores.xlsx` file.
   c. Click **Upload**. The information about the uploaded file is displayed in the table of the **Files** dialog box.
   d. Close the **Files** dialog box.
7. On the form toolbar, click **Prepare**. The table on the **Prepared Data** tab becomes populated with the data from the uploaded file, with each row corresponding to a lead. In the Selection area of the form, notice that the **Number of Records** box contains *10*, which represents the number of leads that have been prepared to be imported in the system.
8. On the form toolbar, click **Import** to initiate the import of the selected records. You will see a notification with a green vertical bar and a message indicating successful processing. Notice that in the table, for the imported records, the check boxes in the **Processed** column are selected.

You have imported to the system leads from the purchased list in the `PurchasedLeadsStores.xlsx` file. On the *Leads* (CR301000) form, you can see all newly imported leads.

Step 2: Reviewing the Data of a Newly Imported Lead

To review the data of the newly imported *Irene Baker* lead, do the following:

1. Open the *Irene Baker* lead on the *Leads* (CR301000) form.

   On the **Document** tab of the Summary area, notice that in the **Status** box, *New* is inserted and in the **Source** box, *Purchased List* is inserted. On the **Contact Info** tab, notice that the contact information from the `PurchasedLeadsStores.xlsx` file is inserted.
2. Open the **CRM Info** tab. In the **Lead Class** box, notice that *STORE* is inserted. In the **Contact Method** box, notice that *Phone* is inserted.

You have reviewed the data of the newly imported lead and made sure that it has been correctly imported from the `PurchasedLeadsStores.xlsx` file.

Leads: To Create a Lead by Using the Acumatica Add-In for Outlook

The following activity demonstrates how to create a lead by using the Acumatica add-in for Outlook and quickly update the lead's information in the system.

Story

You receive an email from Stephanie Andrews, a purchasing manager at Muffin Secret bakery. In the email, Stephanie requests for the detailed price list of the SweetLife Fruits & Jams. Bill needs to register the lead in the system for further communication.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following features have been enabled on the *Enable/ Disable Features* (CS100000) form.

- *Customer Management*
- *Outlook Integration* in the *Third-Party Integrations* group of features

The Acumatica add-in for Outlook should be installed for your Microsoft Outlook application. For details, see *Using the Acumatica Add-In for Outlook*.

Process Overview

In this activity, you will create a new lead in the system by using the Acumatica add-in for Outlook and quickly edit the lead's contact information on the *Leads* (CR301000) form.

System Preparation

Before you start creating a new lead in the system by using the Acumatica add-in for Outlook, you should do the following:

1. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see *Preparation for the Acumatica ERP Installation: System Environment*.
2. Install the Acumatica add-in for Outlook in your Microsoft Outlook application. For details, see *Using the Acumatica Add-In for Outlook*.
3. Launch the Microsoft Outlook app or Outlook on the web.
4. Click the Acumatica button.
5. Sign in to the system as a marketing manager Bill Owen by using the following credentials:
   - **Username**: *owen*
   - **Password**: *123*

Step 1: Creating a Lead by Using the Acumatica Add-In for Outlook

To create a new lead by using the Acumatica add-in for Outlook, do the following:

1. Select an email from the lead.

   > You can select any email from your incoming mail.

2. Click the Acumatica button.
3. On the Acumatica add-in for Outlook form, which opens, click **Create Lead**.
4. 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.
5. Optional: In the **Info** section, specify the information as follows:

> You do not usually need to manually specify a lead's first name, last name, and email address (though you can correct these values as needed), but because you cannot have an email from the lead specified in this activity, we recommend that you correct the lead's contact information.

a. In the **First Name** box, type `Stephanie`.
b. In the **Last name** box, type `Andrews`.
c. In the **Email** box, type `s.andrews@muffin.secret.example.com`.
d. In the **Position** box, type the lead's job title or position: `Purchasing Manager`.
e. In the **Account Name** box, type `Muffin Secret`.
f. In the **Source** box, select the source of the lead: *Other*.
g. In the **Country** box, select the country of the lead: *US*.

6. Click **Create Lead** to create the lead in the system.

> You can click **View Lead** to view the lead record on the *Leads* (CR301000) form, which may open in a pop-up window or in a new browser tab, and add or change the lead data if needed.

You have created a new lead in the system by using the Acumatica add-in for Outlook.

Step 2: Updating the Lead's Information by Using the Acumatica Add-In for Outlook

Suppose that you have scanned the email from Stephanie Andrews once again and noticed her company address. You need to quickly add this address to the system.

To update the lead's information by using the Acumatica add-in for Outlook, do the following:

1. While you are still viewing the lead's contact details on the Acumatica add-in for Outlook form, click **View Lead**. The *Leads* (CR301000) form opens.
2. In the **Address** section on the **Contact Info** tab, do the following:
   a. In the **Address Line 1** box, type `2359 Southern Street`.
   b. In the **City** box, type `New York`.
3. On the form toolbar, click **Save** to save your changes.
4. Close the *Leads* (CR301000) form.

You have updated the lead's information in the system by using the Acumatica add-in for Outlook.

Lesson 1.2: Validating Records for Duplicates

In this lesson, you will learn how to validate an audience for duplicate records.

Record Validation for Duplicates: General Information

Duplicate records in your marketing data may cause data quality problems that result in lost productivity for your marketing and sales teams. A large number of duplicate leads, contacts, and business accounts could trigger the sending of the same marketing materials multiple times to the same contact or business account. The probability of duplicates significantly increases each time that you add a large batch of new records to the system. To address these issues, Acumatica ERP provides flexible tools for eliminating duplicate records.

Learning Objectives

In this lesson, you will do the following:

- Become familiar with the process of duplicate validation, merging, and association of duplicate records
- Validate individual leads for duplicates
- Merge duplicate leads
- Associate a lead with a duplicate contact
- Validate multiple leads for duplicates

Applicable Scenarios

You may want to learn how to validate records for duplicates in Acumatica ERP in scenarios that include the following:

- You are creating a new lead and need to check this lead for duplicates and process any duplicate records.
- You have imported to the system a batch of new leads and need to check these leads for duplicates.
- You regularly validate all records in the system for duplicates, and it is time to again initiate this process.

Validation of Records for Duplicates in Acumatica ERP

Acumatica ERP provides the following abilities to validate records for duplicates:

- You can validate an existing individual record by clicking **Check for Duplicates** on the More menu on the form toolbar of the *Leads* (CR301000), *Contacts* (CR302000), and *Business Accounts* (CR303000) data entry forms.
- You can validate a new record on entry (when you attempt to save it for the first time). If you try to save a duplicate lead, contact, or business account, the system can warn you or it can block the creation of a duplicate record if the corresponding settings have been specified on the *Duplicate Validation* (CR103000) form, as described in *Duplicate Validation: Rules*. For details about validating new leads and contacts on entry, see the following section and *Record Validation for Duplicates: To Validate a Lead for Duplicates*.
- You can mass-validate groups of records on the *Validate Records* (CR503430) form. For details, see *Record Validation for Duplicates: Mass-Validation of Records* and *Record Validation for Duplicates: To Validate Multiple Leads for Duplicates*.

As a result of the validation, for the lead, contact, or business account, the system inserts either *Validated* or *Possible Duplicate* in the **Duplicate** box of the Summary area on the *Leads* or *Contacts* form, or on the **CRM Info** tab of the *Business Accounts* form.

If at least one possible duplicate has been found for a record, the **Duplicates** tab appears on the corresponding data entry form where the record was created. On this tab, you can do the following:

- Merge duplicate records into one record, as described in *Record Validation for Duplicates: Merging of Duplicate Records*.
- Associate a duplicate lead and contact, as described in *Record Validation for Duplicates: Association of Leads and Contacts*.
- Associate a lead with a duplicate business account and any contact of the account, as described in *Record Validation for Duplicates: Association of Leads with Business Accounts and Contacts*.

Validation of Individual Records for Duplicates on Entry

If the **Validate on Entry** check box is selected on the *Duplicate Validation* (CR103000) form for a selected pair of record types (such as **Lead to Contact**), Acumatica ERP validates each new record for duplicates.

Duplicate validation on entry is performed similarly for leads, contacts, and business accounts. You validate an individual lead, contact, or business account for duplicates on entry by performing the following steps:

1. Entering the settings of a record, including its address and contact information, on the *Leads* (CR301000), *Contacts* (CR302000), or *Business Accounts* (CR303000) form.

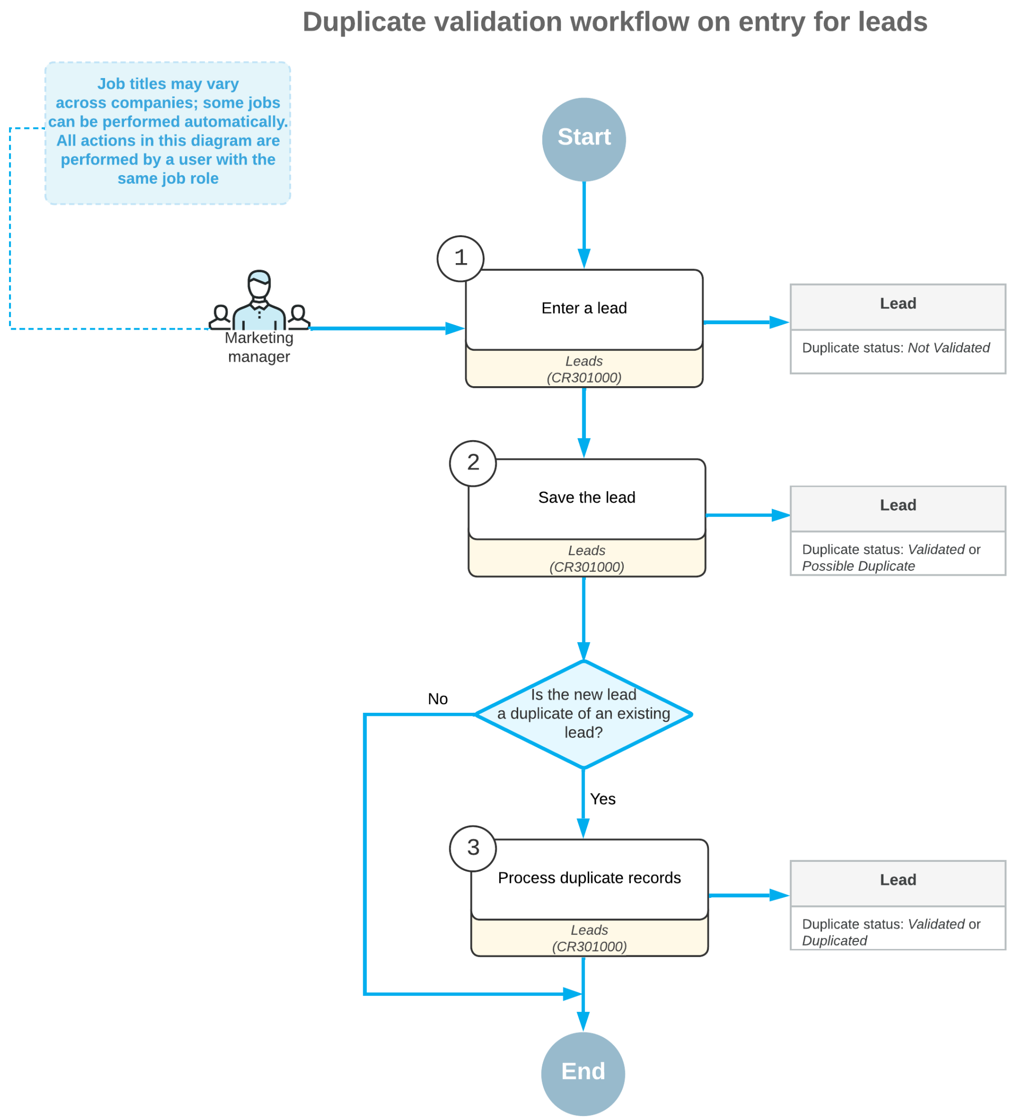
   Address and contact information refers to the values in the UI elements on the **Contact Info** tab of the *Leads* form, the **Details** tab of the *Contacts* form, and the **General** tab of the *Business Accounts* form. Address and contact information may include, for example, the first name, last name, company name, country, postal code, email address, or phone number.

2. Clicking **Save** on the form toolbar to save the record, which causes the system to search for duplicates of the new record. If at least one duplicate among the applicable record type (leads, contacts, or business accounts) has been found, depending on the settings specified on the *Duplicate Validation* form for the pair of record types, the system does one of the following:
   - Saves the record without notifying you about the possible duplicate.
   - Displays a warning dialog box, asking if you want to save the duplicate record.
   - Prevents you from the creation of a duplicate record.
3. Processing duplicate records. If you have saved the record, you can do the following:
   - Merge duplicate records of the same type into one record
   - Associate records of different types with each other

For details, see *Record Validation for Duplicates: Merging of Duplicate Records*

Workflow of Duplicate Validation on Entry for Leads

The following diagram illustrates the workflow of duplicate validation on entry for leads. Although the diagram illustrates the workflow for leads, duplicate validation for contacts and business accounts works similarly.



Support of User-Defined Fields During the Merge of Duplicate Records

The values of user-defined fields can be copied among CRM entities, such as leads, contacts, and business accounts. For details, see *Leads: General Information*. You can view the values of user-defined fields in records listed on the **Duplicates** tab of the *Leads* (CR301000), *Contacts* (CR302000), or *Business Accounts* (CR303000) forms.

If user-defined fields have been added to the forms of the records that are validated for duplicates, in the **Column Configuration** dialog box, you can add the user-defined fields to the **Selected Columns** list, and these fields will be listed in the tables of the **Duplicates** tab.

In the **Merge Conflicts** dialog box, the system lists user-defined fields that have the same attribute identifiers and different values in a target record and in a duplicate record. When you merge duplicate records in the **Merge Conflicts** dialog box, you can indicate to the system which settings to use: those of the target record, or those of the duplicate record.

For details about the support of user-defined fields on CRM forms, see *Leads: General Information*, *Business Accounts: General Information*, and *Contacts: General Information*.

Record Validation for Duplicates: Merging of Duplicate Records

When you have performed duplicate validation for a group of records or an individual record, and at least one duplicate record of the same type has been found, the duplicates are listed in the **Records for Merging** table on the **Duplicates** tab of the *Leads* (CR301000), *Contacts* (CR302000), or *Business Accounts* (CR303000) form.

Merging of Records on the Duplicates Tab

You can merge duplicate records relative to the lead, contact, or business account selected on the data entry form in the **Records for Merging** table on the **Duplicates** tab of the respective form as follows:

- On this tab of the *Leads* (CR301000) form, you can merge the lead that you want to keep as a result of the merge with the duplicate lead.
- On this tab of the *Contacts* (CR302000) form, you can merge the contact that you want to keep as a result of the merge with the duplicate contact.
- On this tab of the *Business Accounts* (CR303000) form, you can merge the business account that you want to keep as a result of the merge with the duplicate business account.

You can select only one record at a time to be merged with the record currently being viewed on the form. The duplicate values of UI elements are highlighted.

You start merging duplicate records by selecting a record in the **Records for Merging** table and clicking **Merge** on the table toolbar of the **Duplicates** tab. In the **Merge Conflicts** dialog box, which opens, you can merge into one record the record that is currently selected on the form (the current record) and the record that you have selected in the **Records for Merging** table (the duplicate record). In the **Target Record** box of the dialog box, you select *Current Record* or *Duplicate Record* to indicate to the system which record to keep as a result of the merge. In the table of the dialog box, for any conflicting field values (that is, different values for the same user interface elements) in the records to be merged, you can select the values to be kept after the merge.

The system does not allow the following records to be merged:

- Leads that are associated with different contacts
- Contacts that are associated with different business accounts
- Business accounts of the *Customer* type

If you select any of these records in the **Records for Merging** table, you cannot click the **Merge** button, and the system shows an error message.

Also, you cannot merge an account of the *Business Account* type with an account of the *Customer* type if the account of the *Business Account* type is the record selected in the **Target Record** box of the **Merge Conflicts** dialog box.

When you have resolved conflicts between the matching fields and merged the target record with the duplicate record, the duplicate record is no longer displayed in the **Records for Merging** table on the **Duplicates** tab.

For the duplicate record, the system inserts the *Duplicated* value in the **Duplicate** box of the *Leads*, *Contacts*, or *Business Accounts* form and closes this record as duplicate. Also, most of the settings in the Summary area of the form and the settings on the tabs of the form become unavailable for editing.

For the target record, after you have saved the changes on the form, the system updates the record's settings, the **Duplicates** tab is no longer displayed, and the system inserts the *Validated* value in the **Duplicate** box of the *Leads*, *Contacts*, or *Business Accounts* form.

If the duplicate record has any associated activities or attached files, those objects are transferred by the system to the target record after the merge.

For details about merging duplicate records, see *Record Validation for Duplicates: To Validate a Lead for Duplicates*.

Copying of Relations from a Duplicate Record to a Target Record

When a target record is merged with the duplicate record, the system copies the relations with associated records from a duplicate record and adds to a target record as follows:

- On the *Leads* (CR301000) form, from a duplicate lead to the lead that is kept after the merge, activities on the **Activities** tab, marketing campaigns on the **Campaigns** tab, marketing lists on the **Marketing Lists** tab, and any associated records on the **Relations** tab.
- On the *Contacts* (CR302000) form, from a duplicate contact to the contact that is kept after the merge, activities on the **Activities** tab, marketing campaigns on the **Campaigns** tab, marketing lists on the **Marketing Lists** tab, leads on the **Leads** tab, and any associated records on the **Relations** tab.
- On the *Business Accounts* (CR303000) form, from a duplicate business account to the account that is kept after the merge, activities on the **Activities** tab, marketing campaigns on the **Campaigns** tab, marketing lists on the **Marketing Lists** tab, leads on the **Leads** tab, opportunities on the **Opportunities** tab, and any associated records on the **Relations** tab. If a case has been associated with the duplicate account of the *Business Account* type, the case is also copied from the duplicate account to the target account on the **Cases** tab.

Record Validation for Duplicates: Association of Leads and Contacts

When you have performed duplicate validation for an individual lead or contact, or a group of leads or contacts, you can associate a lead with a duplicate contact, or a contact with a duplicate lead as described in the following sections.

Association of Leads with Contacts on the Duplicates Tab

When you have performed duplicate validation for an individual lead or a group of leads, and at least one duplicate contact has been found for a lead, you can associate the lead with the contact on the **Duplicates** tab of the *Leads* (CR301000) form. In the **Records for Association** table, you select the contact and click **Associate** on the table toolbar. You can select only one contact at a time to be associated with the lead currently being viewed on the form. The duplicate values of UI elements in the table are highlighted.

In the **Associate the Contact with the Lead** dialog box, which opens, you can associate the selected contact with the lead and select the contact-related settings to be updated for the contact and the lead when they are associated. By default, the **Sync with Lead** check box is selected meaning that after the lead and the contact have been associated with each other, they will have the same contact settings.

> If you clear the **Sync with Lead** check box, the check boxes in the table become unavailable for changing. In this case, after the lead has been associated with the contact, the contact settings on the *Leads* form remain unchanged, the **Override** check box becomes selected on the **Contact Info** tab, and the contact's settings on the *Contacts* (CR302000) form are not updated with values from the associated lead.

After the lead and the contact have been associated with each other, you can see the contact in the **Contact** box of the Summary area on the *Leads* form.

Association of Contacts with Leads on the Duplicates Tab

When you have performed duplicate validation for an individual contact or a group of contacts, and at least one duplicate lead has been found for a contact, you can associate the contact with the lead on the **Duplicates** tab of the *Contacts* (CR302000) form. In the **Records for Association** table, you select the lead and click **Associate** on the table toolbar. You can select only one lead at a time to be associated with the contact currently being viewed on the form. The duplicate values of UI elements in the table are highlighted.

In the **Associate the Contact with the Lead** dialog box, which opens, you can associate the selected lead with the contact and select the contact-related settings to be updated for the contact and the lead when they are associated. By default, the **Sync with Lead** check box is selected meaning that after the contact and the lead have been associated with each other, they will have the same contact settings.

> If you clear the **Sync with Lead** check box, the check boxes in the table become unavailable for changing. In this case, after the contact has been associated with the lead, the contact settings on the *Contacts* form remain unchanged, the **Override** check box becomes selected on the **Details** tab, and the contact's settings on the *Leads* (CR301000) form are not updated with values from the associated contact.

After the contact and the lead have been associated with each other, you can see the summary information about the lead on the **Leads** tab of the *Contacts* form.

Record Validation for Duplicates: Association of Leads with Business Accounts and Contacts

During the association of a lead to a business account, you can update specific contact settings in any contact associated with the business account, create a new contact and associate it with the lead, or associate the lead with the business account without contact creation.

Association of Leads with Business Accounts and Contacts on the Duplicates Tab

When you have performed duplicate validation for an individual lead or a group of leads, and at least one duplicate business account for a lead has been found, you can associate the lead with a business account that is listed on the **Duplicates** tab of the *Leads* (CR301000) form. The duplicate values of UI elements in the table are highlighted.

You start associating the lead with the business account by selecting a duplicate business account in the **Records for Association** table on the **Duplicates** tab and clicking **Associate** on the table toolbar. In the Associate Entities wizard, which opens, you can do any of the following:

- Associate the lead with the business account without selecting or creating a contact.
- Associate the lead with an existing contact of the business account. If any settings are in conflict, you can choose which settings are in use or leave the existing settings.
- Create a new contact for the business account and associate the new contact with the lead.

In the wizard, if you select **Associate the Lead with an Account** (Item 1 in the following screenshot) and click **Next** (Item 2), you can do either of the following on the Associate the Account with the Lead page:

- Associate the account with the lead and leave the lead's contact settings unchanged (Item 3).

  When you click **Associate** (Item 4), the wizard is closed. After you save the changes on the currently opened form, the lead is associated with the business account. In this case, the contact and address settings of the lead remain unchanged.

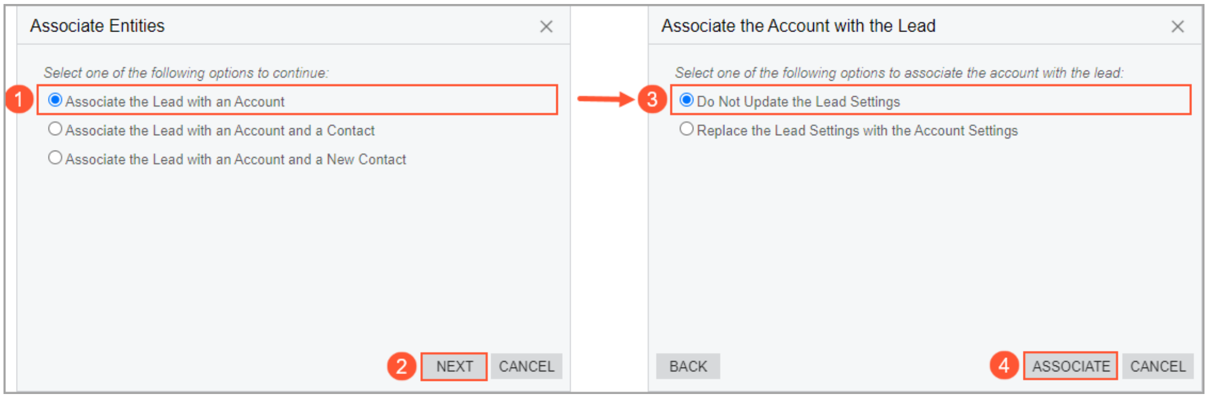


Figure: Lead-account association without changing the contact settings of the lead

- Associate the account with the lead and replace the lead's contact settings with the settings of the business account (Item 3 in the following screenshot).

  When you click **Associate** (Item 4), the wizard is closed. After you save the changes on the currently opened form, the lead is associated with the business account. In this case, the contact and address settings of the lead will be updated with the settings of the associated business account.

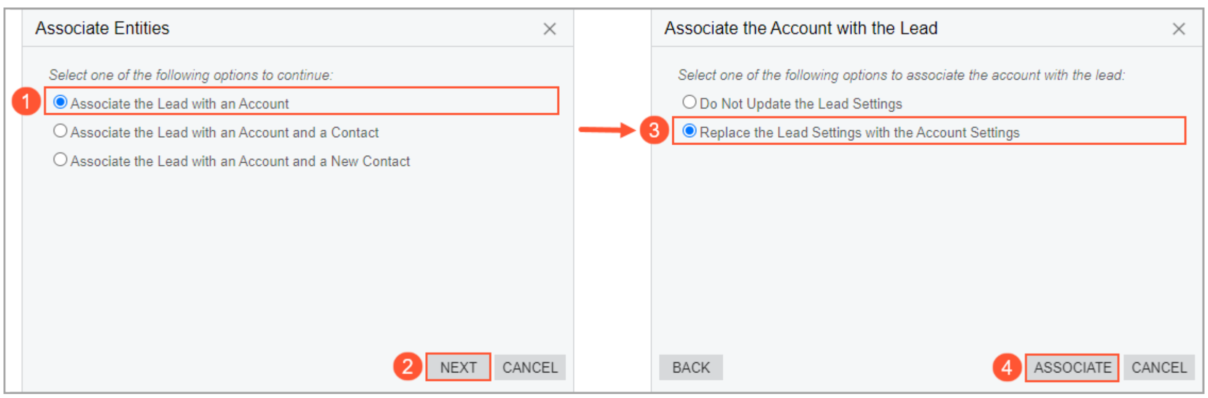


Figure: Replacement of the contact settings in the lead with the settings of the account

In the wizard, if you select **Associate the Lead with an Account and a Contact** (Item 1 in the following screenshot) and click **Next** (Item 2), the Select the Contact for the Lead page opens.

On the Select the Contact for the Lead page, you can do the following:

1. Select the contact to be associated with the lead (Item 3) and click **Next** (Item 4).

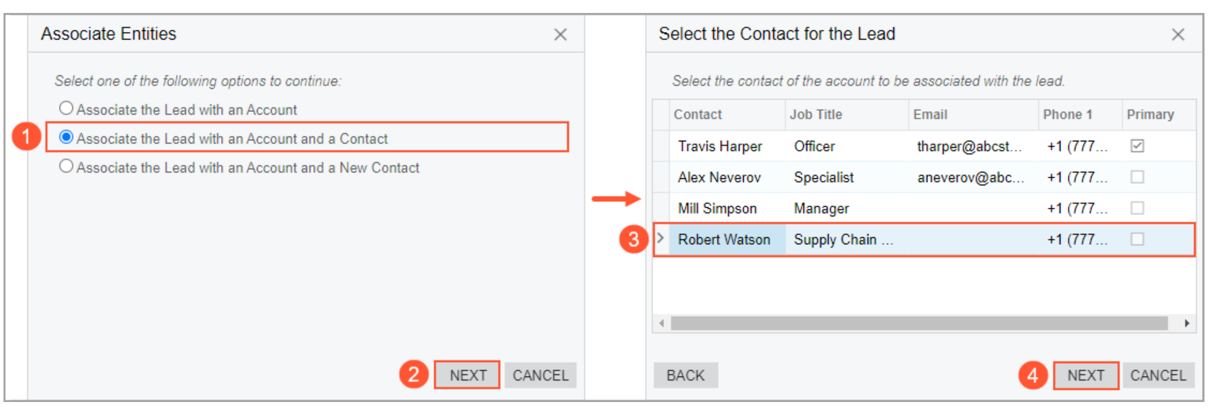


Figure: Contact selection for the account to be associated with the lead

2. On the Associate the Contact with the Lead page, which opens, associate the lead with the selected contact of the business account as follows:
   - Synchronize the contact settings in the lead and the associated contact by leaving the **Sync with Lead** check box selected (Item 1 in the following screenshot), selecting the needed settings in the table (Item 2), and clicking **Associate** (Item 3). The wizard is closed. After you save the changes on the currently opened form, the lead is associated with the contact and the business account. In this case, the contact and address settings in the lead and the associated contact will be synchronized.
   - Clear the **Sync with Lead** check box and click **Associate**. The wizard is closed. After you save the changes on the currently opened form, the lead is associated with the contact and the business account. In this case, the contact settings of the lead and the associated contact remain unchanged.

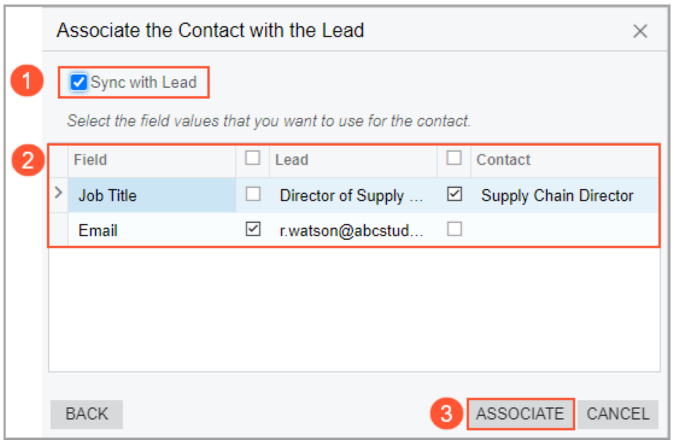


Figure: Contact-lead association and selection of the field values for the contact

In the wizard, if you select **Associate the Lead with an Account and a New Contact** (Item 1 in the following screenshot) and click **Next** (Item 2), you can specify the settings of the contact (Item 3) and create the contact by clicking **Create** or **Create and Review** (Item 4) on the Create Contact page, which opens.

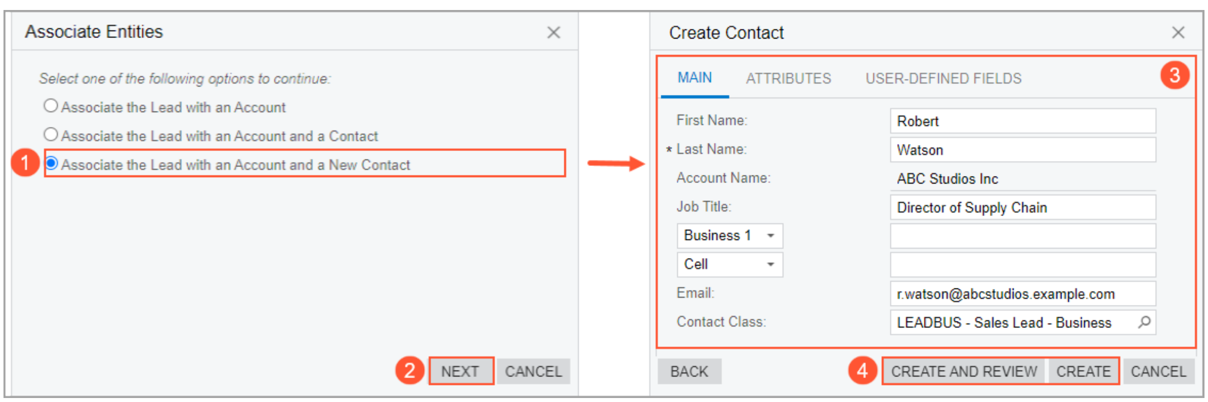


Figure: New contact creation and contact-lead association

The system creates the contact and associates this contact with the lead and the business account.

Record Validation for Duplicates: To Validate a Lead for Duplicates

When you create a lead (or another employee does so), you may want to make sure that the lead has no duplicate leads in the system. If any duplicates have been found, you may want to eliminate a duplicate record. The following activity will show you how to validate a lead for duplicates.

Story

You have contact information for two new leads: Jeanne Martinez, a consultant at the BeeJet Store; and John Kimmel, a purchasing manager at the Honeywind Store. Before you start working with the leads in the system, you need to validate the leads for duplicates.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, and gives users the ability to manage sales opportunities, contacts, marketing lists, and campaigns.
  - *Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality, which you can use to set up and perform automatic validation of lead and contact records for duplicates.
- On the *Duplicate Validation* (CR103000) form, the following settings have been specified:
  - For the **Lead to Lead** pair of records, in the **Create on Entry** column, the *Warn* option has been selected for the *Email* matching field.
  - For the **Lead to Contact** pair of records, in the **Create on Entry** column, the *Warn* option has been selected for the *Email* matching field.
- On the *Leads* (CR301000) form, the *Jeanne Martinez* lead has been created. (You will create a duplicate of this lead.)
- On the *Contacts* (CR302000) form, the *John K. Kimmel* contact has been created. (You will create a lead that has duplicate settings of this contact.)

Process Overview

In this activity, you will do the following by using the *Leads* (CR301000) form:

1. Create a lead, validate the lead for duplicates, and merge the contact data of the newly created lead with the contact data of the existing lead. As a result, the system will save only one lead.
2. Create another lead, validate the lead for duplicates, and associate the lead record with the existing contact record.

System Preparation

Before you start validating leads for duplicates, make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Performing Duplicate Validation for a Lead That Has a Duplicate Lead

To create the *Jeanne Martinez* lead and validate this lead for duplicates, do the following:

1. On the *Leads* (CR301000) form, add a new record.
2. On the **Contact Info** tab, specify the following contact information for the lead:
   - **First Name**: `Jeanne`
   - **Last Name**: `Martinez`
   - **Account Name**: `BeeJet`
   - **Job Title**: `Consultant`

- **Email**: `j.martinez@beejet.example.com`
- **Address Line 1**: `2467 Canterbury Drive`
- **City**: `New York`

3. On the form toolbar, click **Save**. The system checks the lead for duplicates. Because a duplicate has been found, it opens the **Warning** dialog box, asking whether you want to save the lead.
4. In the dialog box, click **Yes**, which closes the dialog box. Because a possible duplicate has been found, the system has inserted *Possible Duplicate* in the **Duplicate** box of the Summary area of the form, and the **Duplicates** tab has appeared on the form.

You have created and validated the *Jeanne Martinez* lead for duplicates. On the **Duplicates** tab, the duplicate lead record (which had already been created) is listed.

Step 2: Merging Duplicate Leads

To merge two duplicate lead records that contain contact information of Jeanne Martinez, do the following:

1. While you are still viewing the *Jeanne Martinez* lead on the *Leads* (CR301000) form, open the **Duplicates** tab. In the **Records for Merging** table, notice a row that has summary information about the duplicate lead. The duplicate values of UI elements in this lead are highlighted.

   > The **Records for Association** table in the lower part of the tab is empty, meaning that the lead does not have any contacts or business accounts with duplicate settings.

2. In the only row of the **Records for Merging** table, click the *Jeanne Martinez* link to open the duplicate lead record in a new browser tab.
3. On the *Leads* form, open the **Activities** tab. Notice that the tab has the following rows:
   - A row with the summary settings of an activity of the *Phone Call* type
   - A row with the summary settings of the *Task* type
4. Return to the browser tab that has the *Leads* form with the *Jeanne Martinez* lead that you have just created.
5. On the table toolbar of the **Records for Merging** table, click **Merge**. The **Merge Conflicts** dialog box opens.

   In the **Target Record** box, notice that *Current Record* is selected. The table in the dialog box lists the different field values in both the lead that you have just created and the duplicate lead that already exists in the system. The **Current Record** column contains the field values for the lead that you are currently viewing on the *Leads* form. The **Duplicate Record** column contains the field values for the duplicate lead.

   Because in the **Target Record** box, *Current Record* is selected, the unlabeled check boxes are selected for all the non-empty field values of the lead that you are currently viewing on the form. You can select or clear check boxes as you need. The **Phone 1** field value is empty in the currently selected lead, and for this field value, the unlabeled check box is selected for the duplicate lead. The system will keep all the selected field values when the leads have been merged.

   > In the **Target Record** box, if you select *Duplicate Record*, the unlabeled check boxes become selected for all the non-empty field values of the duplicate lead.

6. Select the unlabeled check box left of the *BeeJet Store* field value. (Suppose that you have checked that BeeJet Store is the correct name of the lead's company and you want to keep this name.) Notice that the unlabeled check box left of the *BeeJet* field value becomes cleared.
7. Select the unlabeled check box left of the *STORE* field value. This is the correct lead class for the lead because the company of Jeanne Martinez is a supermarket.
8. Click **Resolve** to merge the duplicate leads and close the dialog box. The duplicate lead has been merged with the target one; the system has given the other duplicate lead record the *Disqualified* status.

Notice that in the **Account Name** box of the **Contact Info** tab, the system has inserted *BeeJet Store*. In the Summary area, notice that the system has inserted *Validated* in the **Duplicate** box. On the **CRM Info** tab, in the **Lead Class** box, the system has inserted *STORE*. The **Duplicates** tab is no longer displayed on the form. On the **Activities** tab, notice that the table has the following rows that the system has copied from the duplicate lead:

- A row with the summary settings of the activity of the *Phone Call* type
- A row with the summary settings of the *Task* type

You have merged two duplicate leads into one record.

Step 3: Performing Duplicate Validation for a Lead That Has a Duplicate Contact

To validate the *John K. Kimmel* lead for duplicates, do the following:

1. On the *Leads* (CR301000) form, add a new record.
2. On the **Contact Info** tab specify the following contact information for the lead:
    - **First Name**: `John K.`
    - **Last Name**: `Kimmel`
    - **Account Name**: `Honeywind Store`
    - **Job Title**: `Purchasing Manager`
    - **Email**: `j.kimmel@honeywind.example.com`
    - **Cell**: `+1 (212) 555-0187`
    - **City**: `New York`
3. On the **CRM Info** tab, in the **Lead Class** box, select *STORE*.
4. On the form toolbar, click **Save**. The system checks the lead for duplicates. Because a duplicate has been found, it opens the **Warning** dialog box, asking whether you want to save the lead.
5. In the dialog box, click **Yes**, which closes the dialog box. Because a possible duplicate has been found, the system has inserted *Possible Duplicate* in the **Duplicate** box of the Summary area of the form, and the **Duplicates** tab has appeared on the form.

You have created and validated the *John K. Kimmel* lead for duplicates. On the **Duplicates** tab, the duplicate contact record (which had already been created in the system) is listed.

Step 4: Associating the Lead with the Duplicate Contact

To associate the *John K. Kimmel* lead with the *John K. Kimmel* contact and update the settings in the lead record, do the following:

1. While you are still viewing the *Leads* (CR301000) form for the *John K. Kimmel* lead, open the **Duplicates** tab.
2. In the only row of the **Records for Association** table, which has *Contact* in the **Type** column, click the *John K. Kimmel* link.
3. On the *Contacts* (CR302000) form, which opens in a new browser tab, review the data in the contact record. On the **Details** tab, notice that the contact has the following information that was not specified for the lead:
    - The address settings in the **Address** section
    - The *+1-212-555-0173* phone number in the **Business 1** box in the **Contact** section
4. Return to the browser tab that has *John K. Kimmel* lead opened on the *Leads* form.
5. On the **Duplicates** tab, on the table toolbar of the **Records for Association** table, click **Associate**. The **Associate the Contact with the Lead** dialog box opens. The **Sync with Lead** check box is selected, which means that when the contact and the lead are associated, the contact and address information in both records will be the same because the system has inserted the same values in the contact and address settings for the lead and contact.

6. In the dialog box, do the following:
   a. Select the unlabeled check box left of the *Purchasing Manager* field value because this job title is correct and you want to keep it for both the lead and the contact.
   b. Click **Associate**. This associates the selected lead with the contact that you have just viewed. The dialog box is closed. The **Records for Association** table no longer has any records.

      In the **Contact** box of the Summary area, you can see the *John K. Kimmel* contact, which the lead has been associated with. On the **Contact Info** tab, notice that in the **Business 1** box, the *+1-212-555-0173* phone number is inserted. This value has been copied form the associated contact. In the **Address** section, notice that the address information has been inserted.
7. On the form toolbar, click **Save**.

   The system checks the lead for duplicates. Notice that the system has inserted *Validated* in the **Duplicate** box of the Summary area. The **Duplicates** tab no longer appears on the form because no duplicate records for the *John K. Kimmel* lead have been found.

You have associated the lead with the contact.

Record Validation for Duplicates: Mass-Validation of Records

Acumatica ERP provides the ability to mass-validate groups of leads, contacts, and business accounts for duplicates.

To mass-validate these records, you use the *Validate Records* (CR503430) form. On this form, you can select for validation either all records or only records with *Not Validated* selected in the **Duplicate** box of the record creation form.

Validating all the records in the system may be a time-consuming process if you are validating a very large number of records. You can speed duplicate validation by using parallel processing. For details, see *Duplicate Validation: Implementation Checklist*.

If you are validating all records, once you click **Process All** on the form toolbar, the system starts the processing of the records by first inserting *Not Validated* in the **Duplicate** box of one of the following:

- The Summary area of the *Leads* (CR301000) form for a lead
- The Summary area of the *Contacts* (CR302000) form for a contact
- The **CRM Info** tab of the *Business Accounts* (CR303000) form for a business account

The system then validates each of the records and inserts either *Validated* or *Possible Duplicate* in the **Duplicate** box for the record.

We recommend that you not interrupt the duplicate validation process. If you do, you will not be able to resume it; each time you click **Process All**, the processing starts anew for all listed records.

Record Validation for Duplicates: To Validate Multiple Leads for Duplicates

The following activity demonstrates how to validate multiple records—such as leads, contacts, and business accounts—for duplicates.

Story

You have imported to the system a new purchased list of leads that contains the contact information of bakery, cafe, restaurant, and store employees. You need to check these leads for duplicates.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: Provides the customer relationship management (CRM) functionality, including lead and customer tracking, and gives users the ability to manage sales opportunities, contacts, marketing lists, and campaigns
  - *Duplicate Validation* in the *Customer Management* group of features: Provides the duplicate validation functionality, which you can use to set up and perform automatic validation of lead, business account, and contact records for duplicates
- On the *Duplicate Validation* (CR103000) form, validation settings have been specified. For details, see *Duplicate Validation*.
- On the *Leads* (CR301000) form, lead records have been created, including the *Rita Orozco* lead.
- On the *Import by Scenario* (SM206036) form, a list of lead records that includes duplicates, including the *Margarita Orozco* lead, has been imported from a Microsoft Excel file to the system, which is done.

Process Overview

In this activity, you will do the following:

1. Identify possible duplicates for newly imported lead records by using the *Validate Records* (CR503430) form.
2. View the possible duplicate lead records on the **Duplicates** tab of the *Leads* (CR301000) form.

System Preparation

Before you start validating records for duplicates, make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Validating All Leads for Duplicates

To validate all leads for duplicates, do the following:

1. Open the *Validate Records* (CR503430) form.
2. In the Selection area of the form, select the **Validate All Records** option button.
3. On the form toolbar, click **Process All** to start the duplicate validation process. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of duplicate validation.
4. When the duplicate validation process has been completed, click **Close** to close the dialog box. In the table, notice that in the **Duplicate** column, either *Validated* or *Possible Duplicate* is inserted.

You have validated all records for duplicates, including leads. On the *Leads* (CR301000) form, in the **Duplicate** box of the Summary area, the system has inserted the appropriate option for each lead: *Validated* or *Possible Duplicate*.

> If a lead has the *Disqualified* or *Converted* status, it is excluded from the duplicate validation process, and the option in the **Duplicate** box does not change for this lead.

Now you can view possible duplicate records, which you will do in the following step. For details about merging duplicates and linking the related leads and contacts, see *Record Validation for Duplicates: To Validate a Lead for Duplicates*.

Step 2: Viewing Possible Duplicate Records

In the previous step, you have validated all leads in the system for duplicates. Now you need to view the list of leads that have possible duplicates; you will check the **Duplicate** setting of the *Rita Orozco* lead.

To view possible duplicates, do the following:

1. Open the Leads (CR3010PL) form, which shows a table with the leads that are defined in the system.

   > If you need to change the order of columns in the table (or any other table), you can drag a column by its header to the new location.

2. In the table, click the column header of the **Duplicate** column.
3. In the Sorting and Filtering Settings dialog box, which opens, create a filter to view only records with a **Duplicate** setting of *Possible Duplicate* as follows:
   a. Click **Clear All** to clear the selection of all the options.
   b. Select *Possible Duplicate*.
   c. Click **OK** to close the dialog box and view the filtered list of records.

   The table now lists only the records that have a **Duplicate** setting of *Possible Duplicate*.
4. Find the *Rita Orozco* record, which has *Captain Crunchy Bakery* in the **Account Name** column.
5. In the row with the *Rita Orozco* record, click the link in the **Display Name** column.
6. On the *Leads* (CR301000) form, which opens, open the **Duplicates** tab.

In the **Records for Merging** table, you can view the duplicate lead *Margarita Orozco*. The identical contact information of the duplicate lead is highlighted. Now you can merge duplicate leads, as described in *Record Validation for Duplicates: To Validate a Lead for Duplicates*.

Lesson 2: Managing Prospective Customers

In this lesson, you will learn how to manage prospective customers and about tools that can help you to communicate with the audience more effectively.

Lesson 2.1: Assigning Leads to Owners and Workgroups

In this lesson, you will learn about the different ways you can assign owners to leads.

Lead Assignment to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the customer management workload among responsible individuals in the company. You can use assignment maps to indicate to the system how to assign leads to individuals or groups of people (that is, to owners or workgroups). This topic provides information about assigning leads to owners and workgroups one by one or through mass processing.

Learning Objectives

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

- Assign a lead manually to a particular owner
- In the settings of a lead class, specify how the system determines the default owner it assigns to new leads of the class
- Assign a selected group of leads to workgroups by using a lead assignment map

Applicable Scenarios

You may want to learn how to assign leads to owners and workgroups in scenarios that include the following:

- You have acquired a new lead and need to assign this lead to a particular individual or a group of people for nurturing.
- You have been requested to work with a lead and need to specify yourself as an owner.
- You have imported to the system a new batch of leads, such as a purchased list, and need to distribute these leads among the employees of the applicable department or group, such as a marketing department.

Assignment of Leads to Owners and Workgroups in Acumatica ERP

In Acumatica ERP, you can easily base the rules for lead assignment on company policies because leads can be distributed among owners or workgroups in many different ways, based on the settings and attributes of the lead records being distributed. You can distribute leads manually or automatically.

You can manually assign an individual lead to an owner or workgroup. When you create or edit a lead on the *Leads* (CR301000) form, you can select an owner in the **Owner** box of the Summary area. To assign a lead to a workgroup, you select a workgroup in the **Workgroup** box (on the **CRM Info** tab of the *Leads* form) and then select an owner in the **Owner** box. The list of owners available for selection is narrowed to only owners from the selected workgroup.

You can assign groups of leads that do not have owners specified by using the *Assign Leads* (CR503010) mass processing form. On this form, you can assign selected leads or all leads that do not have owners, and the system uses the assignment map specified on the *Customer Management Preferences* (CR101000) form to determine the owners of the leads.

You can cause leads to be automatically assigned to owners by specifying a setting for any lead class that determines how the default owner is assigned to new leads of the class. You specify this option in the **Default Owner** box on the **Details** tab of the *Lead Classes* (CR207000) form for the lead class, as described further in .

If you want the system to distribute leads between owners and workgroups automatically by using an assignment map, you must perform the following preliminary tasks:

1. Create a company tree on the *Company Tree* (EP204061) form to be able to assign leads to workgroups or to owners.
2. Create the needed maps for the automatic assignment of leads by using the *Assignment Maps* (EP205010) form. You will use an organizational chart from the company tree in the assignment map. For detailed instructions on configuring assignment maps, see *Configuring Assignment Maps*.

On the *Leads* form, you can manually change the owner of a lead that has been manually or automatically assigned in one of the following ways:

- If the lead is not assigned to any workgroup, you can select a new owner in the **Owner** box from the all list of employees.
- If the lead is assigned to a workgroup, you can select a new owner in the **Owner** box from the list of employees included in the workgroup; alternatively, you can change the workgroup and select an owner from the newly selected workgroup.

Distribution of Leads by Using Lead Classes

As noted previously, when you create or modify a lead class on the *Lead Classes* (CR207000) form, you can specify how the system automatically assigns the owner to newly created leads of the class. You do this by selecting the appropriate option in the **Default Owner** box on the **Details** tab (**Data Entry Settings** section). Based on the option selected for the lead class, when a lead class has been selected for a lead on the **CRM Info** tab (**CRM** section) of the *Leads* (CR301000) form, the system determines the default owner of this lead and inserts the appropriate employee name in the **Owner** box in the Summary area of the form.

In the **Default Owner** box of the *Lead Classes* form, you select one of the following options for leads of the class:

- *Do Not Change*: If the owner has been specified in the **Owner** box of the *Leads* form for the lead, and you change the lead class in the **Lead Class** box of the **CRM Info** tab, the system does not clear or change the owner for this lead. If no owner has been specified for the lead, the system leaves the **Owner** box empty.
- *Creator*: When a lead of the class is created, the user who created the lead record is assigned as its owner by default.
- *Assignment Map*: When a lead of the class is created, based on the assignment map (which you must also select in the **Assignment Map** box of the *Lead Classes* form for the class), the system determines the default owner or workgroup (or both) and inserts them on the *Leads* form. The system inserts the workgroup of the lead, if the workgroup has been defined in the assignment map for this lead class, on the **CRM Info** tab (**CRM** section). If you are distributing leads based on assignment maps, you can use a different assignment map for each lead class, if needed.
- *From Source Entity*: When a lead of the class is created, if it is created from another entity, such as a contact, or business account, the lead inherits the owner and workgroup (if specified) from this contact (on the *Contacts* (CR302000) form) or business account (on the *Business Accounts* (CR303000) form).

We recommend distributing leads by using lead classes because the system can assign a lead to an owner or a workgroup, if applicable, each time a new lead record is created.

The Usage of a Company Tree for Assignment

In Acumatica ERP, a company tree is an organizational chart that represents a hierarchical structure of a company with groups that contains a list of people and roles of people within each of the groups. The company tree is used to assign leads, cases, opportunities, business accounts, contacts, or email activities to owners when you want the system to distribute these entities between owners (individuals) and workgroups (groups of people) by using an assignment map on the *Assignment Maps* (EP205010) form.

On the *Company Tree* (EP204061) form, you create a hierarchy of workgroups for using them in the assigning process, and you include people or groups of people in the workgroups. You can include the same people in different workgroups. When you create a new entity, such as a new lead, and select a workgroup for it, you can select as an owner only one of the people that you have included in this workgroup in the company tree. We recommend the use of a company tree to speed and streamline your assignments.

Distribution of Leads by Using Assignment Maps

You can use the assignment map functionality to distribute leads between owners automatically through the use of lead classes or manually when you mass-assign leads.

An assignment map is a set of rules, actions related to rules, and conditions that the system can use for assigning a record or a number of records for processing to a particular individual or a group of people. 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. You create assignment maps on the *Assignment Maps* (EP205010) form as follows (for detailed instructions on configuring assignment maps, see *Configuring Assignment Maps*):

1. On the **Rules** tree, you add new rules.
2. On the **Conditions** tab, you add rule conditions that assignment criteria should meet.
3. On the **Rule Actions** tab, you select an owner or a workgroup (or both).

Once a lead assignment map has been created, you can do either of the following:

- Specify the assignment map on the *Lead Classes* (CR207000) form for the lead class if you have selected *Assignment Map* in the **Default Owner** box on the **Details** tab: Each new lead of the class will be assigned to a default owner according to this map. A user can change the owner as needed on the *Leads* (CR301000) form.
- Specify the assignment map on the *Customer Management Preferences* (CR101000) form, in the **Lead Assignment Map** box of the **General** tab (**Assignment Settings** section): Existing leads that do not have owners will be assigned to owners according to this map if you assign the leads by using the *Assign Leads* (CR503010) mass processing form.

> The assignment map specified for the applicable lead class on the *Lead Classes* (CR207000) form overrides the assignment map specified on the *Customer Management Preferences* (CR101000) form if you create a new lead or change the lead class of the lead. Leads of the class will be assigned to owners according to the assignment map from the lead class.

Execution Issues Related to a Lead Assignment Map

If an assignment map contains errors (for example, a workgroup contains an employee who has quit the company and cannot be assigned to any records), and you have processed any leads that should be assigned according to this assignment map by using the *Assign Leads* (CR503010) form, the system will list these errors in the **Processing** dialog box. You can view the error by clicking the More button on the **Errors** tile in this dialog box. In the **Message** column, the system displays the text of the error message.

Notifications About Assigning a Lead to an Owner

In Acumatica ERP, an administrator can set up email notifications on the *Business Events* (SM302050) form so that if you are assigned to a new lead, you receive a notification by email, by SMS, or in Acumatica mobile app. For details, see *Business Events*.

Lead Assignment to Owners and Workgroups: Process Activity

The following activity demonstrates how to assign leads to owners and workgroups and set up the system to assign leads to owners automatically. The activity will show you how to define a lead class so that leads of the class are assigned to their creators by default. You will also practice manually assigning leads to the appropriate owners, both for an individual lead and by using the mass-processing form to assign multiple users to the needed owners.

Story

You are performing several tasks related to assigning leads to the appropriate owner. First, you need to modify an existing lead class (the class for confectioneries) so that by default, when a new lead of the class is created, the system assigns the lead's creator as its owner. Also, a new lead, *Stanley Carson*, has been created in the system, and you want to manually assign this lead to you and to your workgroup.

A number of leads whose companies can be classified as stores (including supermarkets) and food service companies (bakeries, cafes, or restaurants) have been imported into the system, and you want to distribute these leads between two workgroups of marketing employees as follows:

- The *Marketing Stores* workgroup will be working with leads that represent supermarkets and other stores.
- The *Marketing Food Services* workgroup, to which your *owen* user account belongs, will be working with leads that represent restaurants, cafes, bakeries, and other food service companies.

The workgroups listed above have been defined in the company tree and an assignment map has been created to assign leads to the needed workgroup; also, you have specified the needed configuration setting to cause the system to use this assignment map when you are mass-assigning leads. You will mass-assign leads by using this assignment map.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Company Tree* (EP204061) form, the company tree has been configured and it includes the *Marketing Stores* and the *Marketing Food Services* workgroups as well as the users in the *Marketing* department.
- On the *Assignment Maps* (EP205010) form, the *Lead Assignment Map* has been created. According to the actions related to rules, which are specified in the assignment map, the leads of the *STORE* class are assigned to the *Marketing Stores* workgroup in the SweetLife *Marketing* department, and the leads of the *BAKERY* and *CAFE* classes are assigned to the *Marketing Food Services* workgroup in the *Marketing* department.
- On the *Lead Classes* (CR207000) form, the following lead classes have been created: *STORE* (for leads that are supermarkets and other stores), *BAKERY*, *CAFE* (which includes leads that are restaurants and cafes), and *SWEETSHOP* (for leads that are confectioneries).
- A list of lead records that includes bakeries, cafes, restaurants, and supermarkets has been imported to the system through the *Import by Scenario* (SM206036) form.
- On the *Leads* (CR301000) form, the following leads have been added to the system:
  - *Douglas Keatinge*, assigned to the *STORE* lead class
  - *Stanley Carson*, assigned to the *BAKERY* lead class
  - *Duncan Saunders*, assigned to the *CAFE* lead class

Process Overview

In this activity, you will do the following:

1. On the *Lead Classes* (CR207000) form, specify how the system assigns the default owner of leads of a particular class.
2. Manually assign a particular lead to an owner by using the *Leads* (CR301000) form.
3. Assign selected leads to owners by using the *Assign Leads* (CR503010) form.

System Preparation

Before you start assigning leads to owners, you should do the following:

1. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.
2. Make sure that on the *Customer Management Preferences* (CR101000) form (in the **Lead Assignment Map** box of the **Assignment Settings** section of the **General** tab), *Lead Assignment Map* is specified. If it is not, select this assignment map, and save your changes. The system will use this assignment map during the process of mass-assigning leads.

Step 1: Specifying a Default Owner for New Leads of a Lead Class

You can modify the settings of a lead class to specify how the system assigns the default owner of a newly created lead of the class—that is, whether the default owner is the creator of the lead, a user determined by an assignment map that you specify (so that specific owners can be assigned), or the owner of the entity (such as a contact) from which the lead is created, if the lead was created in this way.

In this step, you will specify the owner of a new lead of the *SWEETSHOP* class as its creator.

To specify the default owner of an existing lead class and make sure the owner is assigned correctly to a new lead of the class, do the following:

1. Open the *SWEETSHOP* lead class record on the *Lead Classes* (CR207000) form.
2. On the **Details** tab (**Data Entry Settings** section), in the **Default Owner** box, select *Creator*.
3. On the form toolbar, click **Save**.
4. Make sure that the option that you have just specified assigns new leads to owners correctly by doing the following:
   a. On the *Leads* (CR301000) form, add a new record.
   b. On the **Contact Info** tab, in the **Contact** section, specify the following settings:
      - **First Name**: `Sandra`
      - **Last Name**: `Flynn`
      - **Account Name**: `Crystal Sweet`
      - **Job Title**: `Manager`
      - **Email**: `s.flynn@crystalsweet.example.com`

   c. On the **CRM Info** tab, in the **Lead Class** box, select *SWEETSHOP*.
   d. In the **Owner** box of the Summary area, notice that *Bill Owen* is inserted in the box. Because this is the user account to which you are signed in and you are the creator of the lead, the setting of the lead class is assigning the owner appropriately.
5. On the form toolbar, click **Save**.

You have specified how the system determines the default owner for leads of the *SWEETSHOP* lead class and then created a new lead to test the setting. The system has appropriately inserted the default owner for the new lead. Each time a user creates a lead of the *SWEETSHOP* class, the system will insert the employee name of the creator of the lead as the owner of the lead.

Step 2: Assigning a Lead to an Owner Manually

To assign a lead to an owner manually, do the following:

1. Open the *Stanley Carson* lead record on the *Leads* (CR301000) form.

   > To search for a record in a list or records, you can enter a text string in the Search box of the filtering area. The system will find all the records that match your search criteria and display these records in the table. For details, see *Searching in Acumatica ERP*.

2. In the **Workgroup** box on the **CRM Info** tab, select the *Marketing Food Services* workgroup.

   > If a workgroup is specified in the **Workgroup** box on the **CRM Info** tab, the list of the employees available for selection as the owner of this lead is limited to those included in the selected workgroup.

3. In the **Owner** box of the Summary area, select *Bill Owen*.
4. On the form toolbar, click **Save**.

You have assigned a lead to yourself and you can start working with this lead.

Step 3: Assigning Selected Leads to Workgroups

Suppose that the *Douglas Keatinge* and *Duncan Saunders* new leads have been added to the system and you need to assign these leads to workgroups.

To mass-assign multiple selected leads to owners, do the following:

1. Open the *Assign Leads* (CR503010) form.
2. In the table, click the header of the **Owner** column.

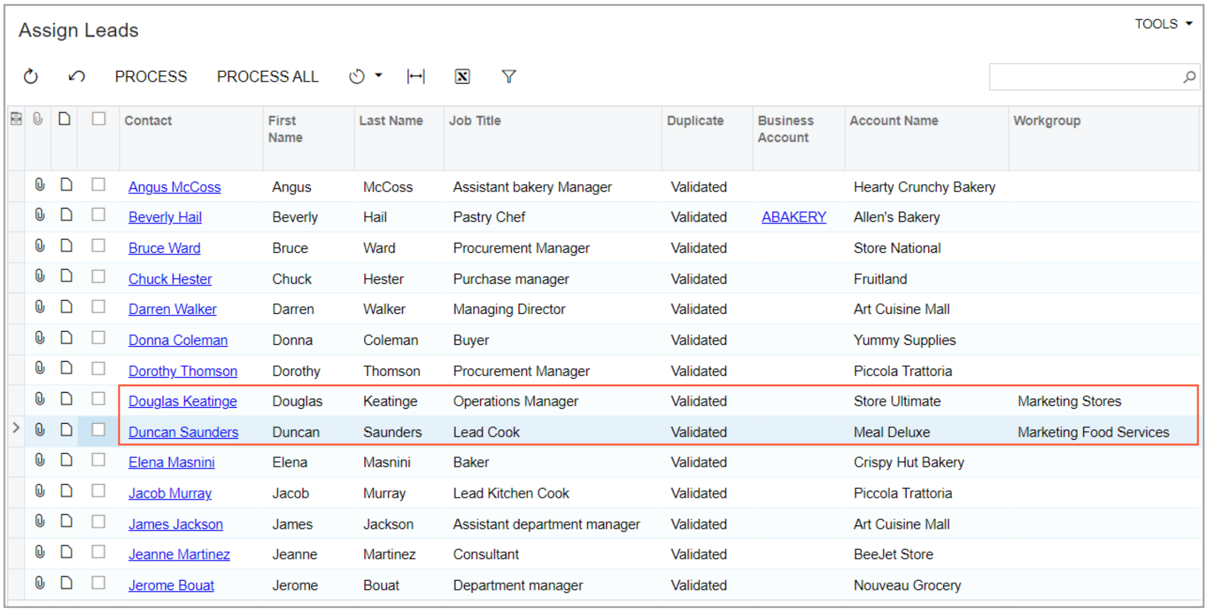
   > If you need to change the order of columns in any table, you can drag a column by its header to the new place in the table.

3. In the Sorting and Filtering Settings dialog box, which opens, do the following to filter unassigned leads:
   a. Select the *Is Empty* filter condition.
   b. Click **OK**. The system closes the dialog box and applies the filter.
4. In the unlabeled column, select the check boxes for the leads with the *Douglas Keatinge* and *Duncan Saunders* links in the **Contact** column.
5. On the form toolbar, click **Process**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning leads to the workgroups according to the lead assignment map that is specified on the *Customer Management Preferences* (CR101000) form.

   > In situations when you want to assign all unassigned leads to owners, you would not select unlabeled check boxes in the table; you would instead click the **Process All** button on the form toolbar. Based on the *U100* settings specified for the *Lead Assignment Map* on the *Assignment Maps* (EP205010) form, all leads would be assigned to either the *Marketing Stores* workgroup or *Marketing Food Services* workgroup.

6. Click **Close** to close the dialog box and return to the form. In the **Workgroup** column, for the *Douglas Keatinge* lead, you can see the *Marketing Stores* name of the workgroup, for the *Duncan Saunders* lead, you can see the *Marketing Food Services* name of the workgroup.

You have assigned two leads to workgroups according to the rules specified in the lead assignment map, as shown in the following screenshot.


Assign Leads
TOOLS
PROCESS
PROCESS ALL

Contact	First Name	Last Name	Job Title	Duplicate	Business Account	Account Name	Workgroup
Angus McCoss	Angus	McCoss	Assistant bakery Manager	Validated		Hearty Crunchy Bakery	
Beverly Hail	Beverly	Hail	Pastry Chef	Validated	ABAKERY	Allen's Bakery	
Bruce Ward	Bruce	Ward	Procurement Manager	Validated		Store National	
Chuck Hester	Chuck	Hester	Purchase manager	Validated		Fruitland	
Darren Walker	Darren	Walker	Managing Director	Validated		Art Cuisine Mall	
Donna Coleman	Donna	Coleman	Buyer	Validated		Yummy Supplies	
Dorothy Thomson	Dorothy	Thomson	Procurement Manager	Validated		Piccola Trattoria	
Douglas Keatinge	Douglas	Keatinge	Operations Manager	Validated		Store Ultimate	Marketing Stores
Duncan Saunders	Duncan	Saunders	Lead Cook	Validated		Meal Deluxe	Marketing Food Services
Elena Masnini	Elena	Masnini	Baker	Validated		Crispy Hut Bakery	
Jacob Murray	Jacob	Murray	Lead Kitchen Cook	Validated		Piccola Trattoria	
James Jackson	James	Jackson	Assistant department manager	Validated		Art Cuisine Mall	
Jeanne Martinez	Jeanne	Martinez	Consultant	Validated		BeeJet Store	
Jerome Bouat	Jerome	Bouat	Department manager	Validated		Nouveau Grocery	

Figure: Leads assigned to workgroups

Lesson 2.2: Managing Emails and Activities

In this lesson, you will learn how to create an email and an activity of the *Phone Call* type. For more information about tasks and events, see *Emails and Activities: Tasks* and *Emails and Activities: Events* Help topics.

> The *Emails and Activities: To Create an Email* and *Emails and Activities: To Track a Phone Call* activities are presented in both CRM Marketing Operations and CRM Sales Operations training guides. If you have completed these activities in the CRM Sales Operations training guide, you need not complete these activities in this guide.

Emails and Activities: General Information

Marketing and sales employees need to communicate with leads to introduce products and services to them, and gather any valuable information that may help in building the relationship between the company and these potential customers. Acumatica ERP provides easy-to-use capabilities for tracking communication with leads.

Learning Objectives

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

- Create an email and send it to a lead
- Register a phone call by creating an activity of the *Phone Call* type

Applicable Scenarios

You may need to learn how to communicate with leads or contacts in Acumatica ERP in scenarios that include the following:

- You need to confirm a lead's contact information.
- You need to find out lead's needs and provide the lead with the needed information.
- You need to arrange a meeting with a lead or a contact.

Use of Emails and Activities in Acumatica ERP

In Acumatica ERP, you can track communication with your leads, prospects, and existing customers by using emails and activities. You can associate emails and activities with leads, contacts, business accounts, marketing lists, marketing campaigns, opportunities, and cases. Emails and activities are listed on the **Activities** tab of the following forms, which are or can be related to the customer relationship management (CRM) functional area:

- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Mass Emails* (CR308000)
- *Marketing Lists* (CR204000)
- *Marketing Campaigns* (CR202000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)
- *Employees* (EP203000)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)

By using the buttons on the table toolbar of the **Activities** tab, you can create an email, a task, or an event by clicking **Create Email**,**Create Task**, or **Create Event**, respectively; alternatively, you can create activities of various types by clicking one of the actions on the **Create Activity** menu. The email or activity opens in a pop-up window, in which you can specify the needed settings and save this email or activity.

You can hide an activity from the Self-Service Portal users by selecting the **Internal** check box in the Summary area of the *Activity* (CR306010) form or on the **Details** tab of the *Task* (CR306020) and *Event* (CR306030) forms. The hidden activity will be available to only the internal Acumatica ERP users.

Pinning of Emails and Activities

In Acumatica ERP, you can pin the most important emails and activities—such as tasks, notes, or phone calls—to the top of the activities list so that you can quickly access and keep track of them. Activity pins are supported for cases, opportunities, and leads. That is, on the **Activities** tab of the *Cases* (CR306000), *Opportunities* (CR304000), and *Leads* (CR301000) forms, you can select an activity that should be pinned to the top of the list and click the **Pin/Unpin** button to pin the activity to the top of the list. Once you have pinned an activity, it is moved to the top of the list and the Pin icon is shown in the **Is Pinned** column.

You can also click a pinned activity and click the **Pin/Unpin** button to unpin the activity. If you unpinned an activity from the list, an icon is no longer shown in the **Is Pinned** column, and the activity is moved to the appropriate location based on the sorting settings.

Tracking of Communication with Leads in Acumatica ERP

Once a lead has been created in the system, you can create and track various activities related to this lead, including emails, phone calls, tasks, and events. (Depending on the lead processing workflow in your company, you may be the owner of the lead, but this is not required.) For each lead, you can create new activities, cancel or complete activities, and attach files or notes to activities. You can manage all activities associated with a lead on the **Activities** tab of the *Leads* (CR301000) form.

For details, see *Emails and Activities: Emails*, *Emails and Activities: Events*, *Emails and Activities: Activities*, and *Emails and Activities: Tasks*.

The Activities Tab

By using the **Activities** tabs on the *Leads* (CR301000), *Contacts* (CR302000), *Business Accounts* (CR303000), *Opportunities* (CR304000), *Cases* (CR306000), *Marketing Lists* (CR204000), and *Marketing Campaigns* (CR202000) forms, you can create activities and associate them with the particular entity. The *Projects* (PM301000) and *Project Tasks* (PM302000) forms also include an **Activities** tab on which you can view only activities associated with the project or task, respectively.

All activities (including current, completed, and not-yet-started ones) related to the selected entity—that is, the lead, contact, business account, opportunity, case, marketing list, marketing campaign, project, or project task 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 **Summary** column, which is a link to the corresponding task, event, or activity.

The list of activities or tasks is presented in a tabular format. The column with the unlabeled header contains icons that indicate the type of the activity in each row. The following icons are used:

- is used for the *Phone Call* activity type.
- is used for the *Email* activity type.
- is used for the *Task* activity type.
- is used for the *Event* activity type.
- is used for the *Chat* activity type.
- Custom icons for activities of other types can be used if they are defined on the *Activity Types* (CR102000) form.

The table has a number of columns with icons as column headings.

You can use the icons in the table rows in the following ways:

- To attach a file to an activity, click the Files icon () in the row related to the activity, and the **Files** dialog box opens. (For detailed instructions on using this dialog box, see *To Attach a File to a Record Detail*.) Once you have attached a file, the File Attached icon () is instead displayed.
- To add a note to the activity, click the Notes icon () in the row related to the activity. The **Enter Record Note** dialog box opens; for instructions on how to use this dialog box, see *To Attach a Note to a Record Detail*. Once you have attached a note, the Note Attached () icon is instead shown in the row. To read the note, click the icon.
- In the column with the Complete Icon () in the column header, note the black check mark if it appears. This check mark indicates that the related activity has been completed.
- Notice the column with the Priority Icon () in the column header. The icon in this row indicates the priority of an email, task and event:
  - If the exclamation mark () appears, the priority level is high.
  - If the black arrow () is displayed, the priority level is low.

    - If the column is empty, the priority level is normal.

- Note the column with the Reminder Icon () in the column header, which indicates whether a reminder has been configured for the activity. If this column is empty for a particular row, a reminder was not set for the activity. If a white bell () is displayed in this column, a reminder has been configured for the activity.

Emails and Activities: Emails

In Acumatica ERP, you can communicate with your company's prospects, customers, vendors, and employees by using emails, which you can quickly and easily create in several different ways:

- While you are working with a record on the data entry form (see the *Creation of Emails from a Data Entry Form* section of this topic). The entity might be a lead, contact, business account, or other record, including those related to customer relationship management (CRM).
- In the process of working with a task or planning an event. For details, see the *Creation of an Email for a Task or Event* section of this topic.
- You can create the email directly on the *Email Activity* (CR306015) form. For details, see the *Creation of an Email Activity from the Workspace* section of this topic.

You can also delete any of the created emails if you no longer need them.

This topic provides more details about the flexible ways to create emails, configure mailing settings, and delete emails in Acumatica ERP.

Configuration of Mailing Settings

Acumatica ERP gives you the ability to specify default settings, including the email address of the sender and the notification templates to be used in CRM. You can configure the default mailing settings as follows:

1. On the *Email Preferences* (SM204001) form, you can specify the system-wide email settings, including the default system email account that is used for sending and receiving emails.
2. On the **Mailing & Printing** tab of the *Customer Management Preferences* (CR101000) form, all mailings that may be used in CRM are listed, and you can modify their default settings.
3. On the **Mailing & Printing** tab of the *Business Account Classes* () form, all mailings that may be used for customers of the class are listed. On this form, you can select and modify only a mailing that is listed on the *Customer Management Preferences* form.
4. On the **Mailing & Printing** tab of the *Business Accounts* (CR303000) form, all mailings that may be used for the selected customer or prospective customer are listed. On this form, you can add a mailing to the **Mailings** table only if it is listed on the *Business Account Classes* form for the business account class or on the *Customer Management Preferences* form; you can modify the default settings of this mailing, if needed.

   The system automatically selects the **Overridden** check box in the **Mailings** table for the mailing in the following cases:

   - If the settings of the selected mailing have been modified as compared with the default settings of the mailing defined on the *Business Account Classes* form for the class of the business account
   - If you add a mailing for the business account class and the same mailing has already been added to the business account of this class

For each mailing listed on the forms mentioned above, the following settings may be specified:

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

- The list of recipients

Order of Applying Mailings

If you attempt to send a document to a business account by email, the system checks for the presence of mailings for this type of document in the following order and applies the first one it finds:

1. A branch-specific mailing that is specified in the business account settings
2. A mailing without a branch selected that is specified in the business account settings
3. A branch-specific mailing that is specified in the business account class settings
4. A mailing without a branch selected that is specified in the business account class settings

If no mailing for this type of document is found, the system does not send the document by email and shows an error message.

Creation of Emails from a Data Entry Form

In Acumatica ERP, you can create an email associated with an entity by clicking the **Create Email** button on the table toolbar of the **Activities** tab of some data entry forms, such as the following:

- *Marketing Campaigns* (CR202000)
- *Marketing Lists* (CR204000)
- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)
- *Mass Emails* (CR308000)
- *Employees* (EP203000)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)

On other data entry forms, such as *Invoices and Memos* (AR301000) or *Sales Orders* (SO301000), you can click **Activities** on the title bar. In the **Task & Activities** dialog box, which opens, you can click **Create Email** to create an email.

Emails Created from a Data Entry Form

When you click the **Create Email** button on the table toolbar of any of the forms listed in the previous section, the *Email Activity* (CR306015) form opens in a pop-up window. On the form, you can create an email and either send the email to the recipient or save the email without sending it (for example, if you need to review and modify the email and send it later).

If you send the email, the system does one of the following:

- If on the *Email Preferences* (SM204001) form, the **Send User Emails Immediately** check box is selected, sends the email at once and assigns it the *Processed* status.
- Assigns it the *Pending Processing* status and adds it to the outgoing mail on the *Send and Receive Email* (SM507010) form. On this form, it can be sent manually. If a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed.

If you send an email that you created from a data entry form, the system returns you to the form you added the activity from and adds a row with the *Email* to the **Activities** tab of the form. If you receive an email in response to your outgoing email, the system lists this email with the *Email Response* type on the **Activities** tab of this form.

If you save an email that you created from a data entry form and close the *Email Activity* form, you can later open the email from the **Activities** tab of the data entry form, make any needed modifications to the email, and send it.

To open an email on the **Activities** tab, you click the link in the **Summary** column of the appropriate row, which opens the email on the *Email Activity* form in a pop-up window. Similarly, you can click the link in this column of any row to view the details of the listed activity on the form used to create it, which varies depending on the activity type.

In the **Related Entity** box of the *Email Activity* form, the system inserts the entity that is associated with the email if a user has created the email while viewing the entity on its data entry form. If the user changes the related entity of the email, the summary information about the email will be added to the **Activities** tab of the form for the new entity. The email will no longer be associated with the entity that was previously selected in this box.

Creation of an Email for a Task or Event

While working with a task or event, you can create an email on the *Email Activity* (CR306015) form by clicking **Create Email** on the table toolbar of the **Activities** tab of the *Task* (CR306020) or *Event* (CR306030) form. In this case, the system inserts a link to the task or event in the **Parent Activity** box of the *Email Activity* form for the email. Also, if the task or event was associated with a CRM entity (such as a lead or an opportunity), the system associates the email with the related entity of the task or event.

Creation of a Response Email

You can create an outgoing email in response to an incoming email by clicking **Reply**, **Reply All**, or **Forward** on the form toolbar of the *Email Activity* (CR306015) form. In this case, the system inserts the link to the incoming email in the **In Response To** box of the response email. If the incoming email has a parent activity (an event or task), the system inserts the link to this activity in the **Parent Activity** box of the *Email Activity* form for the response email.

Creation of an Email Activity from a Workspace

Most companies have workspaces that contain links related to tasks, events, and emails. In an out-of-the-box system, the **Time and Expenses** workspace contains these links, including a *New Email Activity* link. You can click this workspace link to create an email directly on the *Email Activity* (CR306015) form.

You can work with the emails that have been created on the *Email Activity* form by using the following lists of records, which are provided in the out-of-the-box system:

- *Incoming (CO4090PL)*
- *Draft (CO4091PL)*
- *Sent (CO4098PL)*
- *All Emails (CO409070)*
- *Outgoing (CO4092PL)*
- *Deleted (CO4099PL)*
- *Archived (CO4093PL)*

Creation of an Email from a Template

You can create an email from scratch or save time by using a prepared email template from the *Email Templates* (SM204003) form.

To select an email template, you click **Select Template** on the form toolbar of the *Email Activity* (CR306015) form. You can also select where to insert the template's information within the email body and the **Subject**, **To**, **CC**, and **BCC** boxes.

To personalize emails, you can insert the recipient's data into the text of the email by using placeholders. For details, see *Email Templates*.

Copying of Lead-Related Emails to Related Entities

If you have created emails or activities to communicate with a lead and then you create a contact or business account for the lead or convert the lead to an opportunity, the system copies all the emails (and other activities) listed on the **Activities** tab of the *Leads* form to the same tab of the *Contacts* (CR302000), *Business Accounts* (CR303000), or *Opportunities* (CR304000) form, respectively. Thus, the system preserves the history of emails and other activities created for the lead and copies this history to the entities associated with the lead.

> Emails that you create on the *Contacts*, *Business Accounts*, and *Opportunities* forms are associated with only the entity (contact, business account, or opportunity) for which they have been created.

Deleting Emails

If you no longer need an existing email, you can delete it by opening the email on the *Email Activity* (CR306015) form and clicking **Delete** twice on the form toolbar. The first click will assign the *Deleted* status to the email. Clicking **Delete** again will permanently remove the email from the system. You can also delete the email this way from the *All Emails (CO409070)* list of records, except that you first click the row of the email.

Emails and Activities: Activities

In Acumatica ERP, you can create miscellaneous activities—such as notes, chats, phone calls, escalations, messages, and work items—directly from the forms you use to create entities related to customer relationship management (CRM). These entities include leads, contacts, business accounts, marketing lists, marketing campaigns, opportunities, sales quotes, projects, project tasks, project quotes, cases, and employees. While viewing any of these entities on its data entry form, you can create an activity associated with it and track all activities related to the entity.

> This topic is focused on the miscellaneous activities (listed above) that can be created for entities. For details on creating activities that are emails, tasks, or events, see *Emails and Activities: Emails*, *Emails and Activities: Tasks*, and *Emails and Activities: Events*, respectively.

Creation and Tracking of Activities for an Entity

You can create an activity associated with an entity by clicking the needed action on the **Create Activity** menu on the table toolbar of **Activities** tab of any of the following forms:

- *Business Accounts* (CR303000)
- *Cases* (CR306000)
- *Contacts* (CR302000)
- *Employees* (EP203000)
- *Leads* (CR301000)
- *Marketing Campaigns* (CR202000)
- *Marketing Lists* (CR204000)
- *Mass Emails* (CR308000)

- *Project Quotes* (PM304500)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)

When you click the action, the *Activity* (CR306010) form opens in a pop-up window, where you can specify the needed details. When you save the activity, the system returns you to the form you added the activity from and adds a row with the *Activity* type to the **Activities** tab of the form.

On the **Activities** tab, you can view the details of this activity (or any listed activity) by clicking the link in the **Summary** column of the appropriate row, which opens the activity on the form used to create it (which varies depending on the activity type) in a pop-up window.

In the **Related Entity** box of the *Activity* form, the system inserts the entity that is associated with the activity if a user has created the activity while viewing the entity on its data entry form. If the user changes the related entity of the activity, the summary information about the activity will be added to the **Activities** tab of the form for the new entity. The activity will no longer be associated with the entity that was previously selected in this box.

If the activity is not canceled or completed, you can associate it with any existing task or event by selecting the task or event in the **Parent Activity** box of the *Activity* form. If the parent task or event has been associated with a project, the system copies this project (and project task, if one has been specified) to the **Project** and **Project Task** boxes of the *Activity* form.

Copying of Lead-Related Activities to Related Entities

If you have created activities to keep track of all communication that is related to a particular lead, and then you create a contact or business account for the lead or convert the lead to an opportunity, the system copies all the activities listed on the **Activities** tab of the *Leads* (CR301000) form to the same tab of the *Contacts* (CR302000), *Business Accounts* (CR303000), or *Opportunities* (CR304000) form, respectively. Thus, the system preserves the history of activities created for the lead in the associated entities and copies this history to the entities associated with the lead.

Activities that you create on the *Business Accounts* and *Opportunities* forms are associated with only the record (that is, the business account or opportunity) for which they have been created. Conversely, if you create activities for a contact, they are displayed both on the *Contacts* form for the contact and on the *Business Accounts* form for the associated business account.

If based on your work processes you need to create your own set of activity types, you can add, view, edit, and delete types of activities on the *Activity Types* (CR102000) form.

Notifications About Assigning an Activity to an Owner

In Acumatica ERP, a system administrator can set up the automatic built-in notifications about the assigning of activities. You can receive these notifications by email in the following scenarios:

- If you are assigned to a new activity and the creator of the activity is another user.

  To start sending notifications about these events, the system administrator should activate the *CRNewActivity* business event on the *Business Events* (SM302050) form.
- If you are the owner of a related entity (such as a lead, a contact, a business account, an opportunity, or a case) and one of the following events for which you are not the creator has happened:
  - An activity has been created for the related entity and assigned to another user.
  - An existing activity associated with the related entity has been reassigned to another user.
  - An existing activity has been recently associated with this related entity and assigned to another user.

To start sending notifications about these events, the system administrator should activate the *CRNewThirdPartyActivity* business event on the *Business Events* form.

For details, see *Business Events*.

Emails and Activities: Time Reporting

Acumatica ERP gives you the ability to track your working time as you perform your work tasks.

Time Reporting

You can report time spent on activities, tasks, events, and emails if the *Time Management* feature is enabled on the *Enable/Disable Features* (CS100000) form, which makes the **Track Time and Costs** check box available on the *Activity* (CR306010) form. When a user selects this check box, multiple elements appear on the *Activity* form, which you can use to report the total time spent on the activity. You can also select the **Billable** check box to indicate that the activity is billable and specify the information required for billing—that is, the duration of billable time and the earning type of the activity; the earning type determines how the system calculates the cost of employee labor. For details, see *Entering Employee Time*.

Emails and Activities: To Create an Email

The following activity will demonstrate how 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.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, the *Donna Coleman* lead has been added to the system.
- On the *Email Accounts* (SM204002) form, the *marketing@sweetlife.example.com* system email account has been configured.

Process Overview

In this activity, you will create an email on the **Activities** tab of the *Leads* (CR301000) form.

System Preparation

Before you start creating an email, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded.
2. Sign in to the system as marketing manager Bill Owen by using the following credentials:
   - **Username**: *owen*
   - **Password**: *123*

3. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step: Creating an Email

To create an email to be sent to the *Donna Coleman* lead, do the following:

1. On the *Leads* (CR301000) form, open the *Donna Coleman* lead.
2. Open the **Activities** tab.
3. On the table toolbar, click **Create Email**. The *Email Activity* (CR306015) form opens in a pop-up window. Notice that the lead's name is specified in the **To** box.
4. In the **From** box, select the *marketing@sweetlife.example.com*.
5. In the **Subject** box, specify: `New Fruits in Season!`.
6. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

   `Dear Donna,`

   `We are happy to offer seasonal fruits at special prices! Here are our active discount codes:`

   - `SWEETAPPLE for 20% off 1 lb of fresh apples`
   - `FRESHORANGE for 15% off 1 lb of fresh oranges`
   - `WHITEGUAVA for 25% off 1 lb of fresh guavas`
   - `FIREDRAGON for 5% off 1 lb of fresh dragon fruits`

   `Our offer is available until the end of the month.`
7. On the form toolbar, click **Save**.
8. Click **Send**. The system closes the *Email Activity* form and returns you to the *Leads* form. Notice that a row with the *Email* type is added to the table on the **Activities** tab of the *Leads* form for the lead.

As a result, the email is generated by the system and added to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed.

> If the outgoing mail queue is too long, it may take time for the system to process and send all outgoing mail at once.

Emails and Activities: To Track a Phone Call

The following activity will demonstrate how to create an activity of the *Phone Call* type.

Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. 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.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, the *Tim Bonner* lead has been added to the system.

Process Overview

In this activity, you will create an activity of the *Phone Call* type on the **Activities** tab of the *Leads* (CR301000) form.

System Preparation

Before you start creating an activity, you should do the following:

1. Sign in to the system as marketing manager Bill Owen by using the following credentials:
   - **Username**: *owen*
   - **Password**: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step: Creating an Activity of the Phone Call Type

To create an activity of the *Phone Call* type related to the *Tim Bonner* lead, do the following:

1. On the *Leads* (CR301000) form, open the *Tim Bonner* lead.
2. On the More menu, under **Activities**, click **Create Phone Call**. The *Activity* (CR306010) form opens in a pop-up window.
3. In the **Summary** box, type a brief description of the activity: `A call to Tim Bonner`.
4. Optional: If you want the activity to be hidden from the Self-Service Portal users, select the **Internal** check box.
5. In the **Start Date** box, specify the current date.
6. Optional: In the text area, type your comments or any other information related to the phone call, for example: `Tim Bonner responded to the call and confirmed his interest in buying fruits and jams in the future.`
7. On the form toolbar, click Save and Close.

You have added the results of the phone call to the system; notice that a row with the *Phone Call* type is added to the table on the **Activities** tab of the *Leads* form for the lead.

Lesson 2.3: Managing Marketing Lists

In this lesson, you will learn how to create marketing lists to make communication with an audience easier and to broaden your audience.

Marketing Lists: General Information

When your company is nurturing particular leads and contacts, you may want to send newsletters and promotional emails to lists of these contacts. This could be useful for leads with confirmed contact information; you may also want to use marketing lists to communicate with confirmed contacts that are not yet ready to buy any of the currently offered services or products but might be interested in future offers.

Learning Objectives

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

- Create a static marketing list (that is, a list that must be created and changed manually) and add members to this list
- Unsubscribe a member from the marketing list
- Create a dynamic marketing list (that is, a list that can be automatically formed and updated based on rules that you specify)

Applicable Scenarios

You may want to learn how to manage marketing lists in scenarios that include the following:

- You have a list of leads with confirmed contact information and need to regularly promote or showcase the products or services that your organization offers.
- You are ready to launch a marketing campaign and need to create a list with the selected target audience to receive campaign materials.
- You need to reengage old contacts.
- You want to receive feedback from contacts on products or services that may be interesting to them.

Marketing Lists in Acumatica ERP

A marketing list in Acumatica ERP is a list of members that can include leads, contacts, business accounts, and employees. You can create as many marketing lists as you need. Based on a marketing list, you can create mailing lists for mass-mailing newsletters, special offers, or other information that is periodically sent to the members.

You can view and edit existing marketing lists and create new ones on the *Marketing Lists* (CR204000) form. On the **List Members** tab of this form, you can view the members of a particular marketing list.

In the **Status** box of the Summary area of the form, you can select *Active* or *Inactive*. If a marketing list has the *Inactive* status, the list is not shown on the **Marketing Lists** tab of the *Leads* (CR301000), *Contacts* (CR302000), and *Business Accounts* (CR303000) forms. Also, you cannot select the list as the source on the *Mass Emails* (CR308000) form; that is, if you select *Marketing Lists* in the **Source** box of the form (**Summary** tab), the inactive marketing list will not be displayed and available for selection on the **Marketing List** tab of the form.

Each marketing list in Acumatica ERP can be configured to be either dynamic or static, as described in the following sections.

Static Marketing Lists

When you create a marketing list on the *Marketing Lists* (CR204000) form, the default **List Type** option (in the Summary area) is *Static*. A static marketing list is formed and updated manually.

You can include particular members in a static marketing list by doing any of the following on the **List Members** tab of the form:

- Clicking **Add Row** on the table toolbar and then adding the needed member in the row. This step can be repeated many times as needed.
- Using the **Add Members** menu, which opens if you click **Add Members** on the table toolbar. By using the following menu commands, you can select list members from a specific data source:

  - **Add from Generic Inquiry**: Opens the **Add Members** dialog box, in which you can select a generic inquiry, select any shared filter for the generic inquiry, and add only relevant members from the generic inquiry to the current marketing list.
  - **Add from Marketing Lists**: Opens the **Add Members from Marketing Lists** dialog box, in which you can select any number of marketing lists and add the members from these lists to the current marketing list.
  - **Add from Campaigns**: Opens the **Add Members from Campaigns** dialog box, in which you can select any number of marketing campaigns and add the members from the campaigns to the marketing list.
- Clicking **Copy All**, which opens the Copy Members wizard. For details, see the *Copying of Members Between Marketing Lists* section below.
- Clicking **Load Records from File** to upload a Microsoft Excel or CSV file with a list of leads, contacts, or business accounts that exist in the system. During the uploading of the Excel file, the system can also create a new lead or contact if no entity with the same member name exists in the system, and add the entity to the marketing list as a new member. For details, see the following section.

You can convert a static marketing list to a dynamic one by clicking **Convert to Dynamic List** on the form toolbar or the More menu of the *Marketing Lists* form.

Lead and Contact Creation During the Uploading of New Members to a Static Marketing List

On the *Marketing Lists* (CR204000) form, you can upload new members from an Excel file to a static marketing list by using the **Load Records from File** button on the table toolbar of the **List Members** tab. (For details about uploading records in this way, see *To Import Data from a Local File to a Table*.) These new members may already be defined in the system as leads, contacts, or business accounts.

During the uploading of a file, the system can also create a new lead or contact if no record with the same member name exists in the system, and then add the record to the marketing list as a new member.

To cause the system to create new records in the system while uploading new members from a file, you need to perform the following general steps on the **List Members** tab:

1. On the table toolbar, you click **Load Records from File** ().
2. In the **File Upload** dialog box, you select the file you want to import and click **Upload**.
3. In the **Common Settings** dialog box (which opens after you upload the file), you make any needed changes to the default settings for the imported file and then confirm your changes. You should not, however, change the *Bypass Existing* option in the **Mode** box; this option is selected by default and read-only.

   > In the **Property Name** column of the **Common Settings** dialog box, if the system finds a system field with the same name as the column in the Excel file, it inserts the field as the default value (which can be overridden). You can select a field from the drop-down list for the column that contains all the system fields of the `Contact` or `Address` data access class (DAC).

4. In the **Columns** dialog box, which opens, you perform mapping that adheres to the following guidelines:
   - The `Type` field of the `Contact` DAC must be mapped to the column in the Excel file that contains the type of the record. Based on the value in this column in the Excel file, the system creates a new record in the system as follows:
     - If the column contains *Lead*, the system creates a new lead.
     - If the column is empty or contains *Contact*, the system creates a new contact.
   - For the system to create a new lead, the `Last Name` or `Account Name` field of the `Contact` DAC must be mapped with a column in the Excel file that contains the same value.
   - For the system to create a new contact, the `Last Name` field of the `Contact` DAC must be mapped with a column in the Excel file that contains the same value.

If a newly created record has a related business account specified in the file, the **Override** check box is selected for the contact and address information of the record on the *Contacts* (CR302000) or *Leads* (CR301000) form.

If a user specifies their own locale, a translated box value, or both of these, the system also processes the new records and creates a lead or contact in the system with the **Language/Locale** box filled in on the *Contacts* or *Leads* form.

During the creation of the new record, the system may find a possible duplicate record in the system. If a possible duplicate is found, then depending on the selected value in the **Create on Entry** column for the matching field on the *Duplicate Validation* (CR103000) form for this pair of records, the following happens:

- If the *Block* option is selected, the system does not create a new record and does not add a new member to the marketing list; it proceeds to the next record in the Excel file.
- If the *Warn* or *Allow* option is selected, a new record is created and added to the marketing list.

Dynamic Marketing Lists

For a dynamic marketing list, the system uses the generic inquiry you specify to automatically add, remove, and change members to meet the criteria specified in the generic inquiry. To make a marketing list dynamic, you click **Convert to Dynamic List** on the form toolbar or the More menu of the *Marketing Lists* (CR204000) form. In the Summary area, the value in the **List Type** box is changed to *Dynamic* and the **Generic Inquiry** and **Shared Filter** boxes appear on the form. In the **Generic Inquiry** box, you select the generic inquiry from which members will be added. In the **Shared Filter** box, you can select a filter that have been defined for the generic inquiry. The system will apply this filter to the results of the selected generic inquiry, and list members will include only those in the filter. For details, see *Managing Generic Inquiries*.

You can convert a dynamic marketing list to a static one by clicking **Convert to Static List** on the form toolbar or the More menu. If you click this button or command and at least one member is in the table on the **List Members** tab, the system displays a warning dialog box. You can choose what to do with the members after conversion: keep the current members, or delete them from the list.

Copying of Members Between Marketing Lists

You can copy members from the dynamic or static marketing list you are viewing to a new static list or to the existing static list or lists that you select. On the **List Members** tab of the *Marketing Lists* (CR204000) form, when you click **Copy All** on the table toolbar, the Copy Members wizard opens. On the first page of the Copy Members wizard, you can click either of the following buttons:

- **Add All Members to a New Static List**
- **Add All Members to Existing Static Lists**

On the first page of the wizard, if you select **Add All Members to a New Static List** (see Item 1 in the left screenshot below) and click **Next** (Item 2), the Add Members to a New Marketing List page opens, and you can do any of the following:

- Enter the needed settings on the tabs, and then click **Create** to create a new list (Items 3 and 4 in the right screenshot)
- Enter the needed settings on the tabs, create the new marketing list, and open the new list on the same form by clicking **Create & Review**
- Cancel the creation of the list by clicking **Cancel**

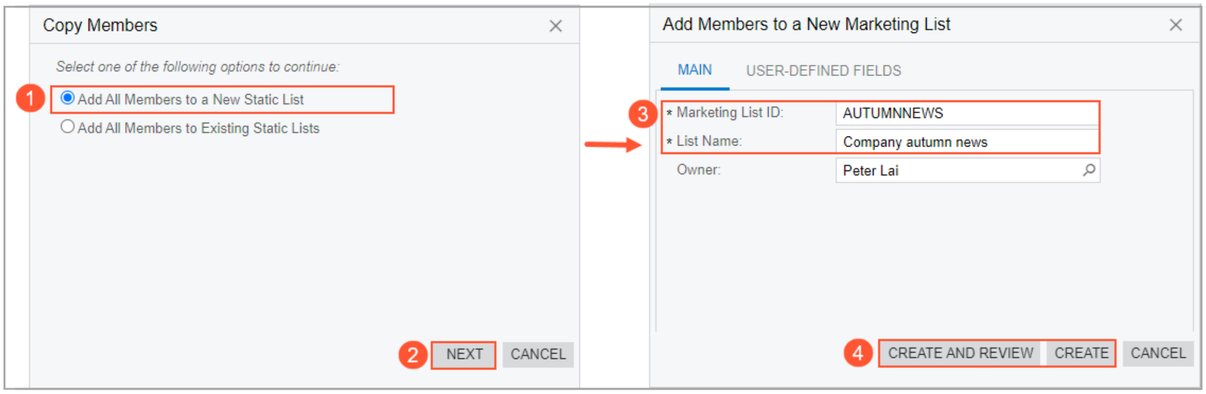


Figure: The creation of a new marketing list

On the first page of the wizard, if you select **Add All Members to Existing Static Lists** (see Item 1 in the left screenshot below) and click **Next** (Item 2), the Add Members to Marketing Lists page opens, and you can do either of the following:

- Copy all members from the current marketing list to the selected marketing lists by selecting the Included check box for each target list and clicking **Copy** (Items 3 and 4 in the right screenshot)
- Cancel the copying of the members by clicking **Cancel**

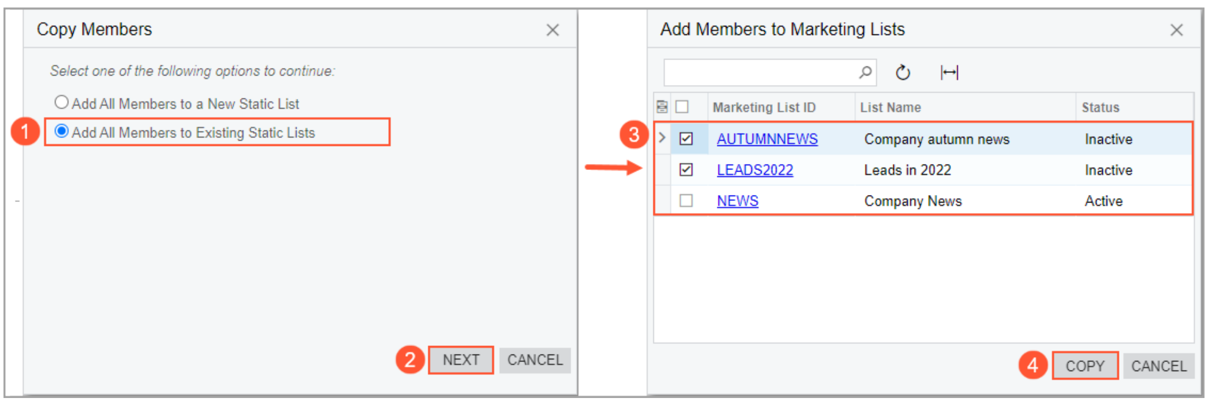


Figure: The addition of members to the selected marketing lists

Management of Members' Subscription

List members may or may not be subscribed to a marketing list. By default, a newly added member is subscribed to the marketing list—that is, a member receives emails that are created and sent on the *Mass Emails* (CR308000) form if *Marketing Lists* is selected as the source on the **Summary** tab and the list is selected on the **Marketing List** tab.

You can subscribe multiple members to a marketing list or unsubscribe multiple members from a marketing list. On the table toolbar of the **List Members** tab of the *Marketing Lists* (CR204000) form, you can click **Manage Subscription > Subscribe All** or **Manage Subscription > Unsubscribe All**.

Clicking the **Subscribe All** or **Unsubscribe All** button subscribes or unsubscribes only the members that are displayed in the table when you click the button (not all members of the list). That is, depending on when you click the menu command, you can do any of the following:

- Subscribe or unsubscribe all the members listed on the tab to the marketing list. In this case, you click the menu command without first filtering records or performing a search.
- By using the search box, search for the records that match the search string (for example, email address or business account) and then click the menu command to subscribe or unsubscribe only the listed members.

- Select a filter in the box on the table toolbar, and then click the menu command to subscribe or unsubscribe only the listed members.

Subscription Management for a Particular Lead, Contact, or Business Account

On the **Marketing Lists** tab of the *Leads* (CR301000), *Contacts* (CR302000), and *Business Accounts* (CR303000) forms, you can view all active static marketing lists and those dynamic marketing lists in which the selected lead, contact, business account, or employee is a member. On this tab, you can subscribe a member (that is, the lead, contact, or business account selected on the form) to any needed static or dynamic marketing lists by selecting the **Subscribed** check box for the list and then saving these changes.

Also, on the **Marketing Lists** tab of any of these forms, you can click **Manage Subscription > Subscribe All** or **Manage Subscription > Unsubscribe All** on the table toolbar to subscribe the member to all the marketing lists shown on the tab or unsubscribe the member from all these lists.

Marketing Lists: To Create a Static Marketing List

The following activity demonstrates how to create static marketing lists and add members to it.

Story

Suppose that you are Bill Owen, a marketing manager of the SweetLife Fruits & Jams company. You need to create a new marketing list that includes leads from bakeries and restaurants with confirmed contact information, contacts and leads from a previously prepared marketing list, and members of one of the company's existing marketing campaigns. These members will receive a special offer from the company with 30 percent off the price of citrus juicers.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, two leads (which will be added to a marketing list manually) of the *CAFE* and *BAKERY* classes with the following lead IDs have been added to the system:
  - *Leslie Walker*
  - *Leonard Hemmings*
- On the *Marketing Lists* (CR204000) form, the *Cooks* marketing list with five members has been defined.
- On the *Marketing Campaigns* (CR202000) form, the *Juice for Bakeries* marketing campaign with four members has been added.

Process Overview

In this activity, on the *Marketing Lists* (CR204000) form, you will do the following:

1. Create a static marketing list
2. Add members to the static marketing list manually
3. Add members to the marketing list by using an inquiry
4. Add members to the marketing list by using another marketing list
5. Add members to the marketing list by using another marketing campaign

6. For some members of the created marketing list, cancel the subscription

System Preparation

Before you start creating marketing lists, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded.
2. Sign in to the system as marketing manager Bill Owen by using the following credentials:
   - **Username**: *owen*
   - **Password**: *123*
3. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Creating a Static Marketing List

To create a static marketing list, do the following:

1. On the *Marketing Lists* (CR204000) form, add a new record.
2. In the Summary area, specify the following settings:
   - **Marketing List ID**: `JCR30OFF`
   - **List Name**: `Citrus Juicers at a 30% Discount`
   - **Status**: *Active*
3. On the form toolbar, click **Save**.

You have created a static marketing list. You can now add and remove list members, or unsubscribe them from the marketing emails according to your needs or preferences, as described in the following steps.

Step 2: Adding Individual Members to a Static Marketing List

Now you will manually add two members, Leslie Walker and Leonard Hemmings, to the static marketing list you created. While you are still viewing the *Citrus Juicers at a 30% Discount* marketing list on the *Marketing Lists* (CR204000) form, do the following:

1. Go to the **List Members** tab.
2. Add the members to the static marketing list as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Member Name** column, select *Leslie Walker*. The system adds a row with the lead's data to the table.
   c. On the table toolbar, click **Add Row**.
   d. In the **Member Name** column, select *Leonard Hemmings*. The system adds a row with the lead's data to the table.
3. On the form toolbar, click **Save**.

You have added two members to the marketing list manually.

Step 3: Adding Multiple Members to a Static Marketing List by Using a Generic Inquiry

To add multiple members to the marketing list by using a generic inquiry, while you are still viewing the *Citrus Juicers at a 30% Discount* list on the *Marketing Lists* (CR204000) form, do the following:

1. On the table toolbar of the **List Members** tab, click **Add Members > Add from Generic Inquiry**, as shown in the following screenshot.

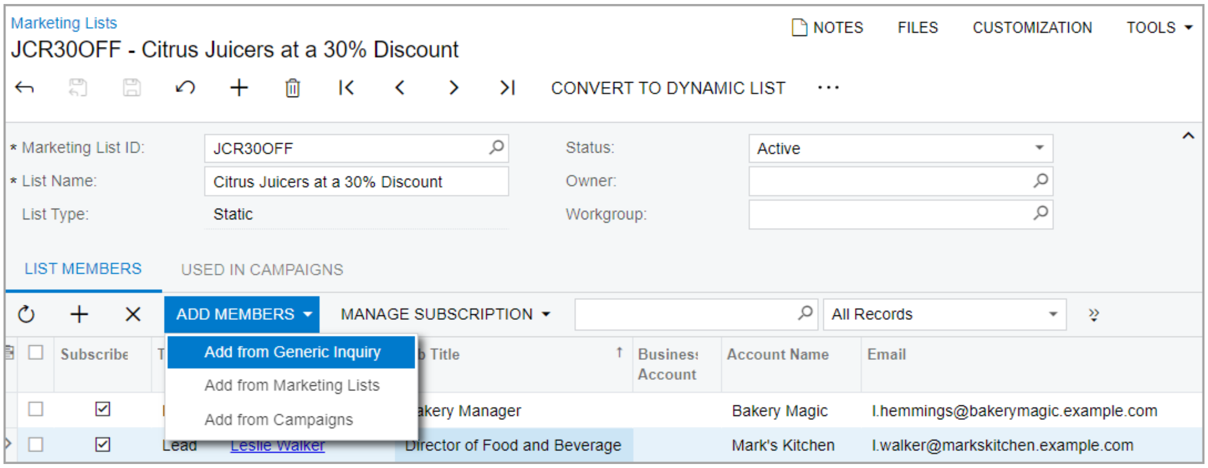


Figure: Addition of the members by using the generic inquiry

2. In the **Add Members** dialog box, which opens, do the following:
   a. In the **Generic Inquiry** box, select the *BI-Leads* generic inquiry, which is predefined (available in an out-of-the-box system).
   b. In the **Shared Filter** box, select the *Leads Ready for Sales* shared filter, which has been defined for the selected generic inquiry. This filter contains only leads that have the *Open* status.
   c. Click **Add**. The system closes the dialog box and adds the leads to the marketing list.

You have added multiple members to the marketing list by using a generic inquiry.

Step 4: Adding Multiple Members to a Static Marketing List by Using a Marketing List

To add multiple members to the marketing list by using another marketing list, while you are still viewing the *Citrus Juicers at a 30% Discount* list on the *Marketing Lists* (CR204000) form,do the following:

1. On the table toolbar of the **List Members** tab, click **Add Members > Add from Marketing Lists**.
2. In the **Add Members from Marketing Lists** dialog box, which opens, do the following:
   a. Select the Selected check box in the row with the *Cooks* marketing list, as shown in the following screenshot.

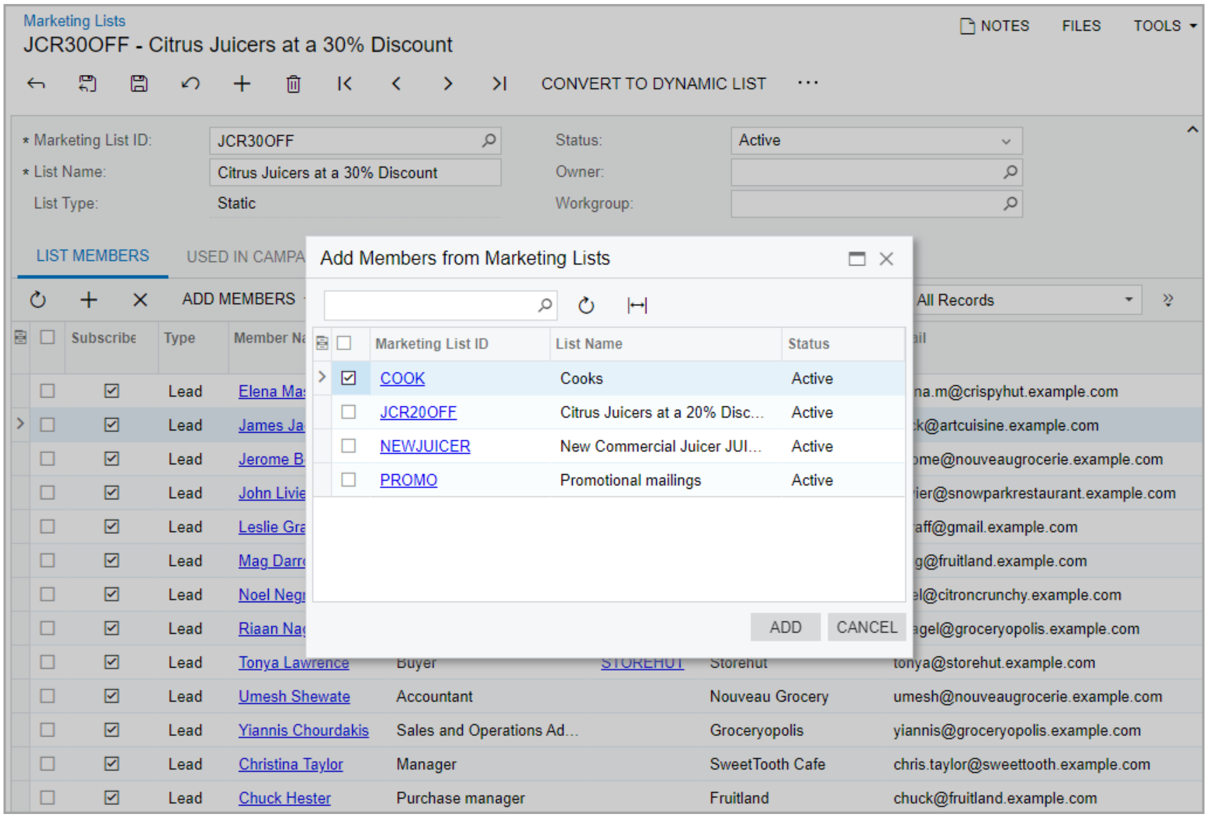


Figure: Addition of the members through a marketing list

- You can select as many marketing lists as you need to add their members to the current marketing list.
- If the table contains a large number of marketing lists, you can use the Search box at the top of the dialog box to find a specific list.
- You can expand this dialog box to a full screen by clicking the icon in the top right corner of the dialog box. This may make it easier to see all the settings of the marketing lists.

b. Click **Add**. The system closes the dialog box and adds the members to the marketing list.

You have added multiple members to the marketing list by using another marketing list.

Step 5: Adding Multiple Members to a Static Marketing List By Using a Marketing Campaign

To add multiple members to the marketing list by using a marketing campaign, while you are still viewing the *Citrus Juicers at a 30% Discount* list on the *Marketing Lists* (CR204000) form, do the following:

1. On the table toolbar of the **List Members** tab, click **Add Members > Add from Campaigns**.
2. In the **Add Members from Campaigns** dialog box, which opens, do the following:
   - Select the Selected check box in the row of the *Juice for Bakeries* marketing campaign.
   - Click **Add**. The system closes the dialog box and adds the members from the marketing campaign to the marketing list.

You have added multiple members to the marketing list by using a marketing campaign.

Step 6: Unsubscribing Multiple Members From the Marketing List

Suppose that you need to temporarily cancel the subscription (that is, cancel marketing mailings for some or all members of the marketing list, but do not remove them from the marketing list) for all the members of the marketing list except those who work as cooks, because you want to initially use this marketing list only for cooks.

To cancel the subscription for most of members of the marketing list, while you are still viewing the *Citrus Juicers at a 30% Discount* list on the *Marketing Lists* (CR204000) form, do the following:

1. On the table toolbar of the **List Members** tab, click **Manage Subscription > Unsubscribe All**.
2. Click the header of the **Job Title** table column.
3. In the Sorting and Filtering Settings dialog box, which opens, apply the filter with the *Contains* condition, type `Cook` in the Search box, and click **OK**. As a result, the table contains five records with the following cooks: *Marc M. Clark*, *Jacob Murray*, *Duncan Saunders*, *Darrell M. Kramer*, and *Leslie Graff*.
4. On the table toolbar, click **Manage Subscription > Subscribe All** to subscribe all of the rows that are currently listed (because of the filter).
5. Remove the filter for the header of the **Job Title** column to make sure that the other members of the marketing list remain unsubscribed.

You have temporarily canceled the subscription for part of the members of the marketing list without removing them from the marketing list, as shown in the following screenshot.

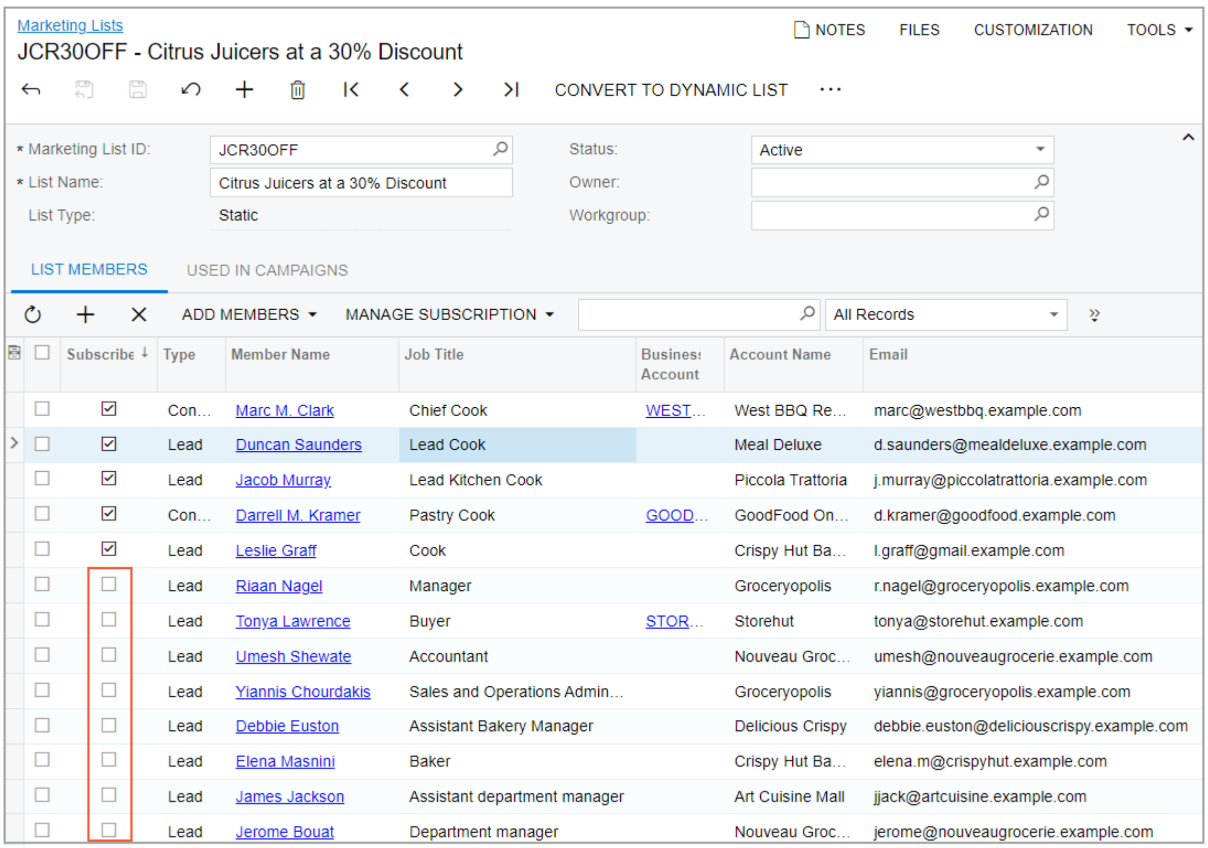


Figure: Cancellation of a subscription to a marketing list for some members

Marketing Lists: To Create a Dynamic Marketing List

The following activity demonstrates how to create dynamic marketing lists.

Story

You need to create the following marketing lists:

- A marketing list that includes all created leads with confirmed contact information. The members of this list will regularly receive a company newsletter.
- A marketing list that includes all members who currently receive the newsletter. These members will receive an advertisement with new juicers.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Scheduled Processing* in the *Monitoring & Automation* group of features: This feature gives you the ability to create schedules for the automatic processing of documents.

Process Overview

In this activity, you will create a dynamic marketing list from scratch on the *Marketing Lists* (CR204000) form and a static marketing list by copying the members from the created dynamic marketing list.

System Preparation

Before you start creating dynamic marketing lists, make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Creating a Dynamic Marketing List by Using a Generic Inquiry

To create a dynamic marketing list, do the following:

1. On the *Marketing Lists* (CR204000) form, add a new record.
2. In the Summary area, specify the following settings:
   - **Marketing List ID**: `NEWS`
   - **List Name**: `SweetLife News`
   - **Status**: Active

   By default, the value in the **List Type** box is *Static* and unavailable for editing.
3. On the form toolbar, click **Convert to Dynamic List**. Notice that the value in the **List Type** box has been changed to *Dynamic*.
4. In the Summary area, specify the selection rules for list members as follows:
   a. In the **Generic Inquiry** box, select *BI-Leads*.

b. In the **Shared Filter** box, select the *Leads Ready for Sales* shared filter, which is one of the filters that have been defined for the specified generic inquiry. This filter contains leads that have the *Open* status.

On the **List Members** tab, the table becomes populated with the leads added to the marketing list.

> If you need to correct the resulting list of members, which are subscribed to marketing mailings automatically after adding them to the list, you can manually unsubscribe a list member or some of them from the mailings by clearing the unlabeled check box in the **Subscribed** column for these members. You can also unsubscribe all added members from the mailings by using **Manage Subscription > Unsubscribe All** on the table toolbar.

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

You have created a dynamic marketing list (see the following screenshot) that includes all leads that have the *Open* status. These leads can receive the SweetLife newsletter when it is sent.

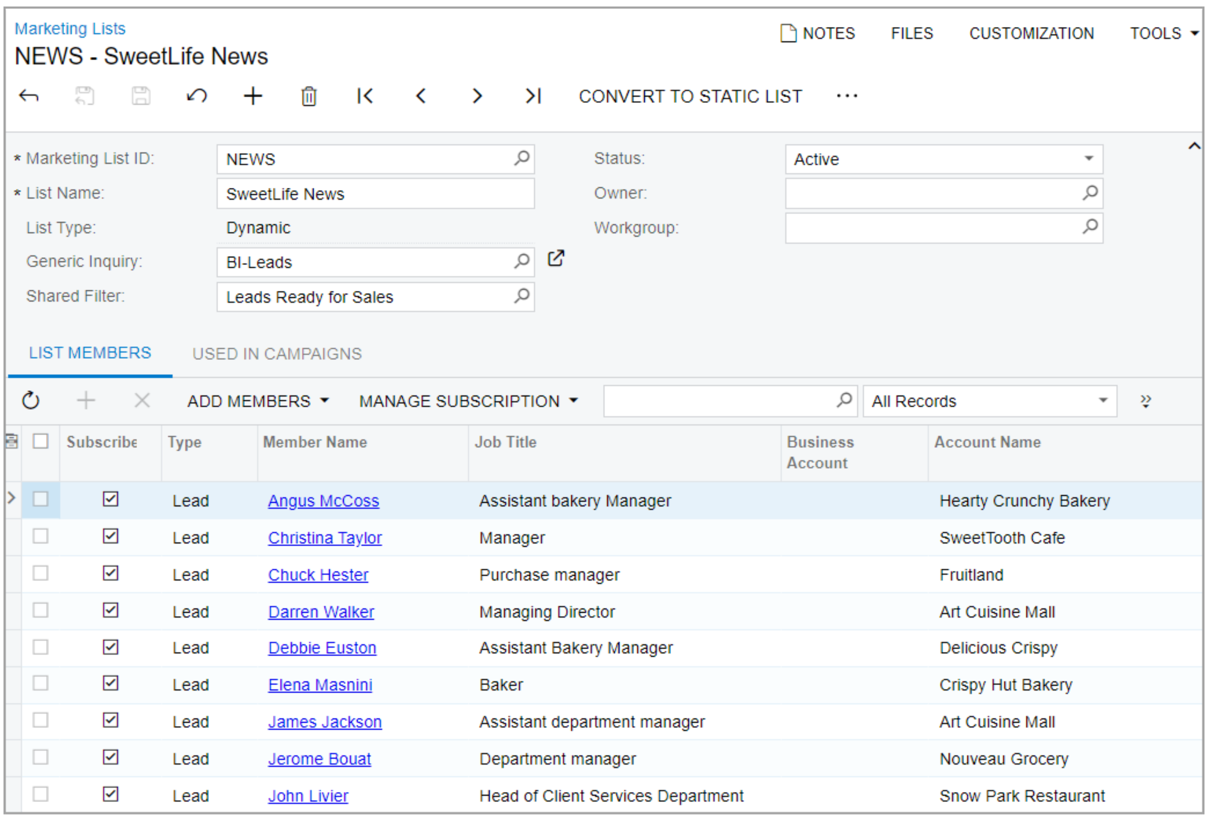


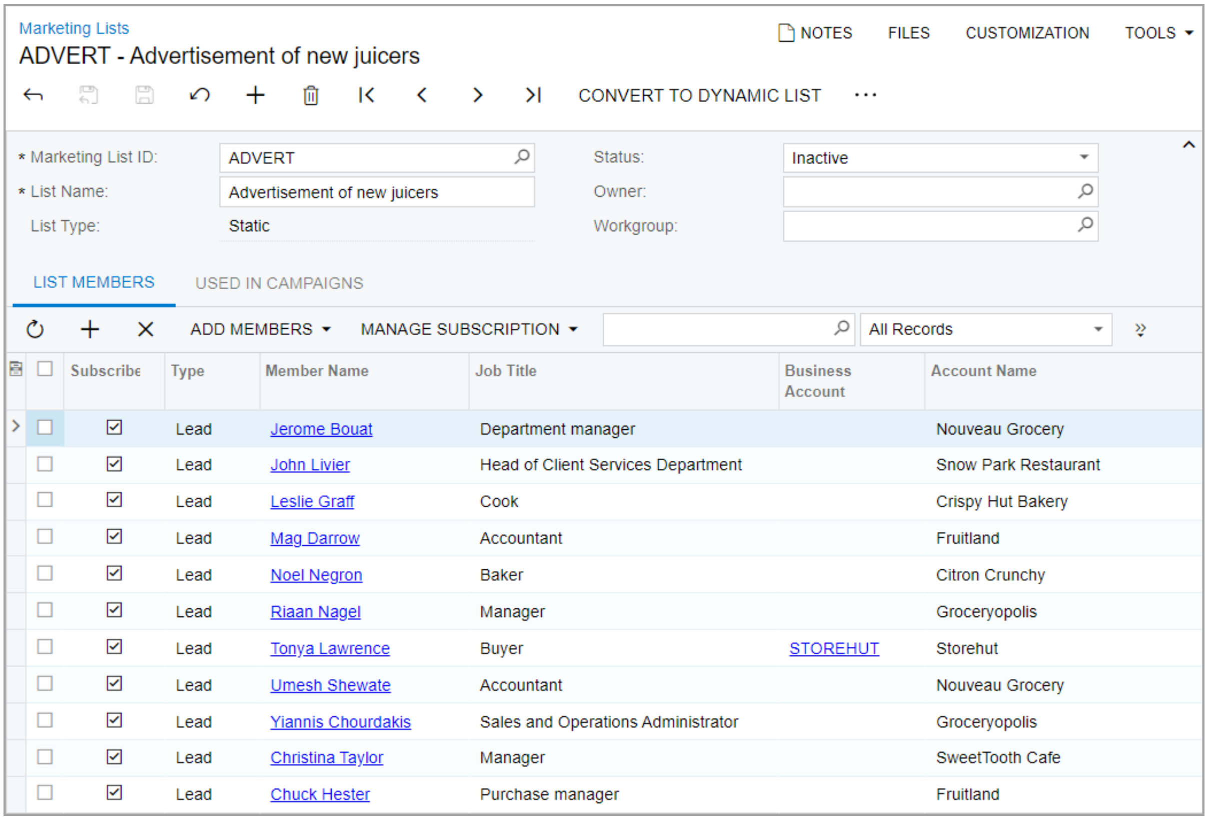
Figure: A dynamic marketing list

Step 2: Creating a Static Marketing List by Copying the Members from a Dynamic Marketing List

Suppose that you want to prepare an advertising letter with new juicers and send this letter to the current members of the dynamic marketing list that you have just created. To create a new static marketing list and copy the members from the dynamic marketing list, on the *Marketing Lists* (CR204000) form, do the following:

1. While you are still viewing the *SweetLife News* list, on the table toolbar of the **List Members** tab, click **Copy All**.
2. In the Copy Members wizard, which opens, do the following:
   a. Make sure that the **Add All Members to a New Static List** option button is selected.
   b. Click **Next**.

3. On the **Main** tab of the Add Members to a New Marketing List page, which opens, specify the following settings:
   a. **Marketing List ID**: `ADVERT`
   b. **List Name**: `Advertisement of new juicers`
4. Click **Create & Review**. The system closes the dialog box, adds the leads to the newly created static marketing list, and opens the list on the *Marketing Lists* form, as shown on the following screenshot. Notice that the status of the newly created marketing list is *Inactive* by default.



Marketing Lists
ADVERT - Advertisement of new juicers
NOTES FILES CUSTOMIZATION TOOLS
CONVERT TO DYNAMIC LIST

* Marketing List ID: ADVERT
* List Name: Advertisement of new juicers
List Type: Static
Status: Inactive
Owner:
Workgroup:

LIST MEMBERS USED IN CAMPAIGNS

ADD MEMBERS MANAGE SUBSCRIPTION All Records

	Subscribe	Type	Member Name	Job Title	Business Account	Account Name
☐	☑	Lead	Jerome Bouat	Department manager		Nouveau Grocery
☐	☑	Lead	John Livier	Head of Client Services Department		Snow Park Restaurant
☐	☑	Lead	Leslie Graff	Cook		Crispy Hut Bakery
☐	☑	Lead	Mag Darrow	Accountant		Fruitland
☐	☑	Lead	Noel Negron	Baker		Citron Crunchy
☐	☑	Lead	Riaan Nagel	Manager		Groceryopolis
☐	☑	Lead	Tonya Lawrence	Buyer	STOREHUT	Storehut
☐	☑	Lead	Umesh Shewate	Accountant		Nouveau Grocery
☐	☑	Lead	Yiannis Chourdakis	Sales and Operations Administrator		Groceryopolis
☐	☑	Lead	Christina Taylor	Manager		SweetTooth Cafe
☐	☑	Lead	Chuck Hester	Purchase manager		Fruitland

Figure: A new static list with members copied from the dynamic marketing list

> You can create a static marketing list by copying the members from a static marketing list as well.

You have created a static marketing list by copying the members to it from a previously created dynamic marketing list.

Lesson 2.4: Managing Mass Emails Related to a Marketing List

In this lesson, you will learn how to send a mass email to the members of a marketing list. For more information about mass emails, see *Lesson 3.2: Managing Mass Emails Related to a Marketing Campaign*.

Mass Emails

In Acumatica ERP, you can create a mass email and send it to the intended audience— such as members of a marketing campaign, marketing list members, selected contacts, or mailing list members—by using the *Mass*

Emails (CR308000) form. You can set up a mass email to be sent to all members of a particular marketing campaign or to only those members who have not previously been sent emails as part of the campaign.

You can create an email from scratch, or you can use a template prepared using the *Email Templates* (SM204000) form. By using predefined templates, you can save time. To personalize emails, you can insert the recipient's data into the text of the email by using placeholders. For details, see *Email Templates*.

Before sending a mass email, you can test the mass email by sending a preview email to one of your email accounts. For details, see *Mass Emails: To Create and Send a Mass Email*.

Mass Emails: To Email from a Marketing List

The following activity demonstrates how to send a mass email to the members of a marketing list.

Story

You need to send emails to leads with confirmed contact information that represent employees from bakeries and restaurants with a special offer from the company to buy its citrus juicers at a 20 percent discount. To make the process of preparing a mass email quicker, you will apply an email template created by the marketing team of SweetLife Fruits & Jams company.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Leads* (CR301000) form, a list of leads has been created in the system.
- On the *Marketing Lists* (CR204000) form, the *JCR20OFF* marketing list has been created, and the *Jacob Murray*, *Leslie Walker*, *Nicholas Langdon*, *Paul Mitchell*, and *Leonard Hemmings* leads have been added to the marketing list.
- On the *Mass Emails* (CR308000) form, the *Citrus Juicers 20% Off* mass email has been created.
- On the *Email Accounts* (SM204002) form, the system email account *marketing@sweetlife.example.com* has been added.
- On the *Automation Schedules* (SM205020) form, a schedule for periodic runs of the *Send and Receive Email* process has been created.

Process Overview

In this activity, you will do the following on the *Mass Emails* (CR308000) form:

1. Prepare a mass email to be sent to the members of a marketing list.
2. Send the mass email to the test mailbox to make sure that the email will be delivered to the recipients.

System Preparation

Before you start sending mass emails to the members of a marketing list, make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Preparing a Mass Email to Be Sent to the Members of the Marketing List

To prepare a mass email to be sent to the members of the *JCR20OFF* marketing list, do the following:

1. Open the mass email *Citrus Juicers 20% Off* on the **All Records** tab of the *Mass Emails* (CR308000) form.
2. On the **Summary** tab, specify the mass email settings as follows:
   a. In the **Source** box, select *Marketing Lists*.
   b. In the **Planned** box, specify the date when you plan to send this email, such as the current date.
3. To apply the email template, on the form toolbar, click **Select Template**.
4. In the **Select Template** dialog box, which opens, do the following:
   a. In the **Template** box, select the *Weekly Company Digest* template, which is predefined.
   b. Leave the **After Email Body** check box selected.

      In this case, the system adds the values (including empty values) of the **Subject**, **To**, **CC**, and **BCC** boxes and the text area of the template after any existing values of the same boxes and the text area of the mass email.

   c. Click **Select**.

   The system closes the dialog box and adds the content of the text area of the *Weekly Company Digest* template to the text area of the **Summary** tab. The values in the **Subject**, **To**, **CC**, and **BCC** boxes of the mass email have not changed because these boxes are empty in the *Weekly Company Digest* template.

   > If you select the **Replacing Email Body** check box in the **Select Template** dialog box, the system replaces the values in the **Subject**, **To**, **CC**, and **BCC** boxes and the text area with the respective values from the same boxes and the text area of the template. You can change these settings, if needed.

5. In the text area of the **Summary** tab (after the *We are happy to announce the latest news of our company* sentence), type the following text:

   ```
   We are happy to offer you a special 20% discount on our citrus juicers!
   You can get a very good price for them if you place an order during this
   week.
   ```

6. On the **Marketing List** tab, in the table, select the unlabeled check box for the *JCR20OFF* marketing list. The members of this list will be added to the addressees of the mass email.
7. On the form toolbar, click **Save**.

You have prepared the mass email based on the template to be sent to the members of the *JCR20OFF* marketing list. Now you can test sending the email to make sure it will be delivered to the recipients.

Step 2: Sending a Mass Email to a Test Mailbox

To send a mass email to a test mailbox, do the following:

1. While you are still viewing the *Citrus Juicers 20% Off* mass email on the *Mass Emails* (CR308000) form, on the form toolbar, click **Preview Message**.

   The system opens the *Email Activity* (CR306015) form in a pop-up window with a test message in which the following boxes are filled in as follows:

   - **From**: *marketing@sweetlife.example.com*
   - **To**: *system@sweetlife.example.com*

   Notice the *Draft* status of the message in the **Email Status** box on the **Details** tab.

2. On the form toolbar, click **Send**. The system sends the message and closes the window with the *Email Activity* form.
3. Open the **Messages** tab. In the table, the system has added the row that has the settings of the test message. In the **Email Status** column, notice the *Pending Processing* status of the message. As soon as the test email has been delivered to the test mailbox, the system changes the status to *Processed*.

> If a test email account has been configured as described in *Configuring Email Accounts*, and the test message has been successfully delivered to your test mailbox, you can click **Send** on the form toolbar to send the mass emails to the members of the marketing list.

Lesson 3: Managing Marketing Campaigns

In this lesson, you will learn how to communicate with customers by using marketing campaigns.

Lesson 3.1: Managing Marketing Campaigns

In this lesson you will learn how to create and manage marketing campaigns.

Marketing Campaigns: General Information

A marketing campaign is a specific set of marketing activities aimed to achieve a particular marketing goal, such as promoting products and services, stimulating demand, boosting brand recognition, or generating revenue. Acumatica ERP provides you with tools that help you track campaign preparation and analyze the results of campaign execution.

Learning Objectives

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

- Create a marketing campaign
- Move the marketing campaign through stages
- Track expenses related to the marketing campaign through integration with project accounting
- View marketing campaign statistics

Applicable Scenarios

You may want to learn how to manage a marketing campaign in scenarios that include the following:

- You need to analyze and evaluate the results of a marketing campaign.
- You need to launch a small email marketing campaign.

Marketing Campaigns in Acumatica ERP

In Acumatica ERP you can track the leads, opportunities, revenue, and expenses associated with a marketing campaign; thus, you can analyze the results and evaluate the efficiency of this marketing campaign.

When you acquire new leads and then create them on the *Leads* (CR301000) form or import them into the system, you can select a marketing campaign as the source of the lead. You can send emails to generate interest among the existing leads and track these emails and activities related to nurturing the leads during the campaign. If a lead is converted to an opportunity and the opportunity has been won or lost, you will be able to track and evaluate the revenue of this marketing campaign. You can link a marketing campaign with a project and track expenses related to the marketing campaign. For details, see the following sections.

Preparation of a Marketing Campaign

In Acumatica ERP, you can create a new marketing campaign (such as an email campaign) or start tracking the progress of a campaign (such as a billboard advertisement campaign) that has already been launched. The data that you enter when you create a campaign can be used in reports.

Before you start tracking the progress of a marketing campaign, you should do the following preparatory work:

- On the *Campaign Classes* (CR202500) form, define campaign classes to set up the types of campaigns your company uses; each campaign class may have a list of attributes that can be used for detailed reporting as described in *Defining Case Classes*.
- On the *Marketing Campaigns* (CR202000) form, prepare a list of campaign members: You can select campaign members among leads, contacts, business accounts, and employees; also, you can select campaign members from any other entity that has contact information (for example, by creating a generic inquiry that collects contacts from invoices). For details, see the following section.
- On the *Marketing Campaigns* form, create a campaign and specify the necessary settings, such as the planned budget and the return on investment you expect to receive as a result of the campaign. This information may be useful when you analyze campaign results.

As a marketing campaign proceeds, on the *Marketing Campaigns* form, you can select any of the following stages:

- *Planning*: A marketing person is preparing the marketing campaign.
- *Execution*: A marketing person has started sending emails to the campaign members and creating activities related to the campaign.
- *Completed*: The marketing campaign is over, and analysis of the results of the marketing campaign is planned or in progress.
- *Canceled*: A marketing person has canceled the marketing campaign before its completion.

Management of Members in a Marketing Campaign

On the **Marketing Lists** tab of the *Marketing Campaigns* (CR202000) form, all the static and dynamic marketing lists available in the system are shown. You can add members from a marketing list or multiple lists by selecting the unlabeled check boxes in the row of these marketing lists and saving your changes to the form. If you change the set of selected marketing lists and click **Save**, the system shows a warning message. You can keep the current campaign members or update the members from the newly selected set of marketing lists.

You can update the set of the campaign members added from marketing lists on the **Members** tab of the form by clicking **Update List** on the table toolbar. Manually added members remain in the campaign.

Also, by clicking **Clear All** on the table toolbar, you can remove all the members currently listed in the table as follows:

- If you click the button without first filtering records, removes all the members from the list
- If you first filter records in the table or search for records that meet the needed criteria, and then you click the button, removes only the listed members from the list

Lead and Contact Creation During the Uploading of New Members

On the *Marketing Campaigns* (CR202000) form, you can upload new members from an Excel file to a marketing campaign by using the **Load Records from File** button on the table toolbar of the **Members** tab. (For details about uploading records in this way, see *To Import Data from a Local File to a Table*.) These new members may already be defined in the system as leads, contacts, or business accounts.

During the uploading of a file, the system can also create a new lead or contact if no record with the same member name exists in the system, and then add the record to the campaign as a new member.

To cause the system to create new records in the system while uploading new members from a file, you need to perform the following general steps on the **Members** tab:

1. On the table toolbar, you click **Load Records from File** ().
2. In the **File Upload** dialog box, you select the file you want to import and click **Upload**.

3. In the **Common Settings** dialog box (which opens after you upload the file), you make any needed changes to the default settings for the imported file and then confirm your changes. You should not, however, change the *Bypass Existing* option in the **Mode** box; this option is selected by default and read-only.

   > In the **Property Name** column of the **Common Settings** dialog box, if the system finds a system field with the same name as the column in the Excel file, it inserts the field as the default value (which can be overridden). You can select a field from the drop-down list for the column that contains all the system fields of the `Contact` or `Address` data access class (DAC).

4. In the **Columns** dialog box, which opens, you perform mapping that adheres to the following guidelines:
   - The `Type` field of the `Contact` DAC must be mapped to the column in the Excel file that contains the type of the record. Based on the value in this column in the Excel file, the system creates a new record in the system as follows:
     - If the column contains *Lead*, the system creates a new lead.
     - If the column is empty or contains *Contact*, the system creates a new contact.
   - For the system to create a new lead, the `Last Name` or `Account Name` field of the `Contact` DAC must be mapped with a column in the Excel file that contains the same value.
   - For the system to create a new contact, the `Last Name` field of the `Contact` DAC must be mapped with a column in the Excel file that contains the same value.

     If a newly created record has a related business account specified in the file, the **Override** check box is selected for the contact and address information of the record on the *Contacts* (CR302000) or *Leads* (CR301000) form.

     If a user specifies their own locale, a translated box value, or both of these, the system also processes the new records and creates a lead or contact in the system with the **Language/Locale** box filled in on the *Contacts* or *Leads* form.

During the creation of the new record, the system may find a possible duplicate record in the system. If a possible duplicate is found, then depending on the selected value in the **Create on Entry** column for the matching field on the *Duplicate Validation* (CR103000) form for this pair of records, the following happens:

- If the *Block* option is selected, the system does not create a new record and does not add a new member to the marketing campaign; it proceeds to the next record in the Excel file.
- If the *Warn* or *Allow* option is selected, a new record is created and added to the marketing campaign.

Tracking of Emails and Activities Associated with a Marketing Campaign

In Acumatica ERP, you can keep track of emails and activities related to a marketing campaign as follows:

- Associate various activities with the campaign, as described in *Managing Emails and Activities*
- Associate generated or existing leads with the campaign by selecting the marketing campaign as the source of the lead in the **Source Campaign** box of the Summary area on the *Leads* (CR301000) form
- Send individual emails to the campaign members, as described in *Managing Emails and Activities*
- Send mass emails to the campaign members, as described in *Managing Mass Emails*

Marketing Campaign Statistics

In Acumatica ERP, you can view the following marketing campaign statistics on the *Marketing Campaigns* (CR202000) form:

- On the **Campaign Details** tab, 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
  - **Leads Generated**: The number of leads that have been created because of the campaign
  - **Leads Converted**: The number of leads converted to opportunities because of the campaign
  - **Opportunities**: The number of opportunities associated with the campaign
  - **Won Opportunities**: The number of opportunities associated with the campaign that have been eventually won
  - **Opportunities Value**: The total amount of the opportunities associated with the campaign
  - **Won Opportunities Value**: The total amount of the won opportunities associated with the campaign
- On the **Members** tab, the number of created opportunities, activities, and emails related to the campaign and associated with a particular campaign member
- On the **Generated Leads** and **Opportunities** tabs, lists of all leads and opportunities that have this marketing campaign specified as their source campaign

You can generate campaign-related reports and use these reports to calculate the revenue affected by a campaign. For more information, see *Marketing Reports: Campaign Analysis*.

Marketing Campaigns: Process Activity

The following activity demonstrates how to create a marketing campaign in the system and change the stages of the marketing campaign.

Story

SweetLife management has decided to launch a marketing campaign that will promote online master classes focused on teaching the audience how to use juicers that the company sells. You need to create the marketing campaign, add members, and after the campaign has finished, change the stage of the campaign to *Completed* in preparation for analyzing the campaign results.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Campaign Classes* (CR202500) form, the *MSTRCLASS* campaign class has been created.
- On the *Leads* (CR301000) form, a number of leads have been created, including *Jonas Clayton* and *Douglas Keatinge*.
- On the *Marketing Lists* (CR204000) form, the *JCR20OFF* marketing list, which includes a number of leads (*Leslie Walker*, *Leonard Hemmings*, *Paul Mitchell*, *Nicholas Langdon*, and *Jacob Murray*), has been added to the system, as described in *Marketing Lists: To Create a Static Marketing List*.

Process Overview

In this activity, you will do the following on the *Marketing Campaigns* (CR202000) form:

1. Create a marketing campaign.
2. Add members to the marketing campaign.

3. Change the stage of the marketing campaign.

System Preparation

Before you start creating a marketing campaign, you should do the following:

1. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.
2. Download the *CRMContactImport.xlsx* file, which has new contacts, to your computer.

Step 1: Creating a Marketing Campaign

To create a marketing campaign, do the following:

1. On the *Marketing Campaigns* (CR202000) form, add a new record.
2. In the Summary area, do the following:
   a. In the **Campaign Class** box, select *MSTRCLASS*.
   b. In the **Campaign Name** box, type the name of the campaign: `Juice Master Class`.
   c. In the **Stage** box, select *Planning*.
3. On the **Campaign Details** tab, specify the campaign settings as follows:
   a. In the **Start Date** box, specify 1/30/2025.
   b. In the **Workgroup** box, specify `Marketing`.
   c. In the **Expected Response** box, specify `5` (the number of responses to the campaign that you expect).
   d. In the **Planned Budget** box, specify `700`.
   e. In the **Expected Return** box, specify `3500`.
   f. In the text area, add the following description of the marketing campaign: `A marketing campaign that promotes online master classes focused on teaching the audience how to use juicers`.
4. On the form toolbar, click **Save**.

You have created a marketing campaign. Now you can add members to this campaign.

Step 2: Adding Individual Members to the Marketing Campaign

To add members to the marketing campaign one by one, do the following:

1. While you are still viewing the *Juice Master Class* campaign on the *Marketing Campaigns* (CR202000) form, open the **Members** tab.
2. On the table toolbar, click **Add Row** to add a member to the marketing campaign.
3. In the **Member Name** box, select *Jonas Clayton*. The system adds a row with the lead's data to the table.
4. On the table toolbar, click **Add Row** to add another member to the marketing campaign.
5. In the **Member Name** box, select *Douglas Keatinge*. The system adds a row with the lead's data to the table.
6. On the form toolbar, click **Save**.

You have added two individual members to the marketing campaign one by one.

Step 3: Adding Multiple Members to the Marketing Campaign by Using a Marketing List

Suppose that one more marketing campaign has already been launched: SweetLife offers citrus juicers at a special price to the leads with confirmed contact information to increase sales. These leads have been added to the *Citrus Juicers at a 20% Discount* (*JCR20OFF*) marketing list, and you need to add these members to the marketing campaign.

To add multiple members to the marketing campaign from the marketing list, do the following:

1. While you are still viewing the *Juice Master Class* campaign on the *Marketing Campaigns* (CR202000) form, open the **Marketing Lists** tab.
2. In the **Selected** column, select the check box in the row with the *JCR20OFF* marketing list.
3. On the form toolbar, click **Save**.
4. In the **Confirmation** dialog box, which opens, click **Update** to update the campaign members.

The system automatically copies the members to the list of members on the **Members** tab from the *Citrus Juicers at a 20% Discount* marketing list. Notice that for these members, the name of the source marketing list has been added to the **Marketing List ID** column of the **Members** tab, as shown in the following screenshot.

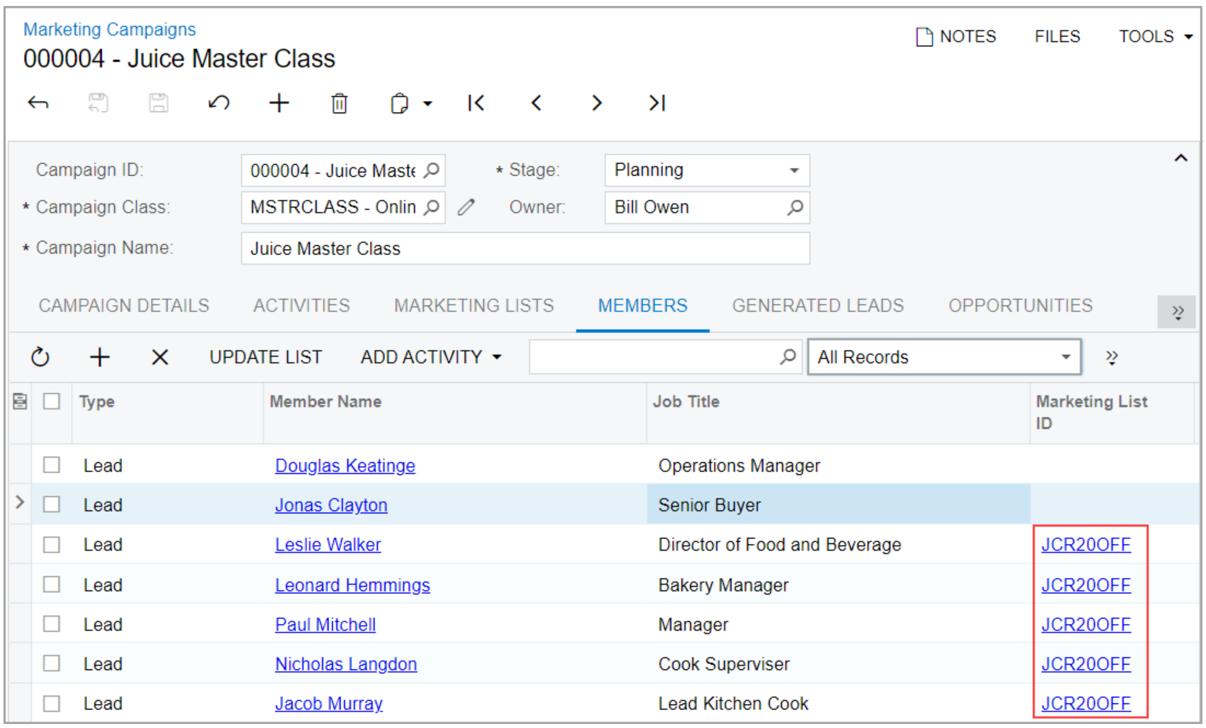


Figure: The addition of the members from the marketing list to the campaign

You have added members from the marketing list to the marketing campaign.

Step 4: Uploading with the Creation of New Contacts

Suppose that your colleague has given you a list of new contacts who might be interested in participating in the online master class. You have created an Excel file with these contacts, and now you are ready to add them to the marketing campaign. You want the system to create a new contact for each listed contact that is not already defined in the system.

To upload the new contacts from the file, you will use the **Load Records from File** button. While you are still viewing the *Juice Master Class* campaign on the *Marketing Campaigns* (CR202000) form, do the following:

1. On the table toolbar of the **Members** tab, click **Load Record from File**.
2. In the **File Upload** dialog box, which opens, click **Choose File**, and select the *CRMContactImport.xlsx* file, which you previously downloaded to your computer.
3. Click **Upload** to upload the file to the system.
4. In the **Common Settings** dialog box, which opens, leave the default settings, and click **OK**.
5. In the **Columns** dialog box, which opens, notice that the system automatically matches most values in the **Column Name** and **Property Name** columns. Leave the default values in the columns, and click **OK**.
6. After the system has finished uploading the members to the form, click **Close** in the **Processing** dialog box.

   The system closes the dialog box.
7. On the **Members** tab, make sure that the new contacts have been added to the campaign.
8. Optional: Click the link in the **Member Name** column of one of the uploaded contacts to make sure that a new contact has been created in the system. The system opens the contact on the *Contacts* (CR302000) form in a pop-up window.

Step 5: Changing the Stage of the Marketing Campaign

Suppose that the *Juice Master Class* campaign has been launched and then completed.

To change the stage of the marketing campaign, do the following:

1. While you are still viewing the *Juice Master Class* campaign on the *Marketing Campaigns* (CR202000) form, in the **Stage** box of the Summary area, select *Execution*.

   > On the **Activities** tab, you can add activities that are related to the launch, execution, and completion of the marketing campaign, as described in *Managing Emails and Activities*.

2. On the form toolbar, click **Save**.
3. In the **Stage** box of the Summary area, select *Completed* to record in the system that the marketing campaign has been completed.
4. On the form toolbar, click **Save**.
5. On the **Members** tab, review the list of the members of the *Juice Master Class* marketing campaign (see the following screenshot). Notice that the list of the members includes all members that had been added to the campaign both manually and automatically.

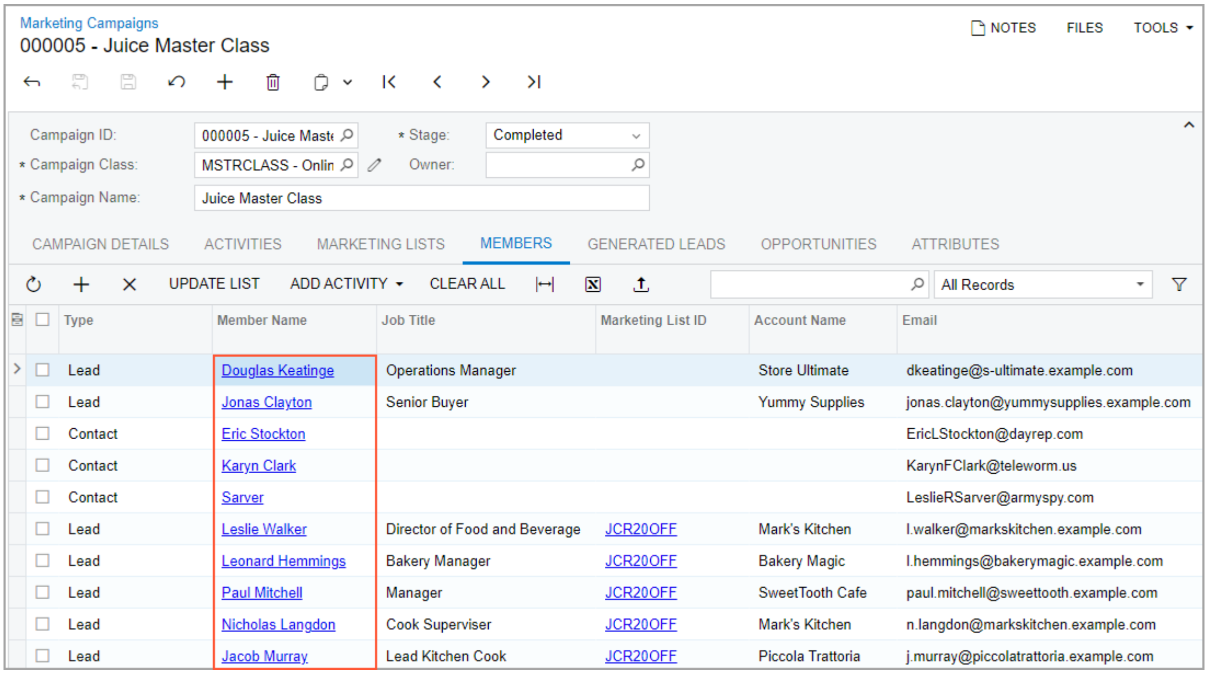


Figure: List of members of the marketing campaign

You have completed the processes of creating the marketing campaign and changing the stages of the marketing campaign.

Lesson 3.2: Managing Mass Emails Related to a Marketing Campaign

In this lesson, you will learn how to send a mass email to the members of a marketing campaign. For more information about mass emails, see *Lesson 2.4: Managing Mass Emails Related to a Marketing List*.

Mass Emails

In Acumatica ERP, you can create a mass email and send it to the intended audience— such as members of a marketing campaign, marketing list members, selected contacts, or mailing list members—by using the *Mass Emails* (CR308000) form. You can set up a mass email to be sent to all members of a particular marketing campaign or to only those members who have not previously been sent emails as part of the campaign.

You can create an email from scratch, or you can use a template prepared using the *Email Templates* (SM204000) form. By using predefined templates, you can save time. To personalize emails, you can insert the recipient's data into the text of the email by using placeholders. For details, see *Email Templates*.

Before sending a mass email, you can test the mass email by sending a preview email to one of your email accounts. For details, see *Mass Emails: To Create and Send a Mass Email*.

Mass Emails: To Email from a Marketing Campaign

The following activity demonstrates how to send a mass email to the members of a marketing campaign.

Story

You have launched a marketing campaign. The campaign will promote online master classes focused on demonstrating how to use citrus juicers that the company sells. You need to send emails to your target audience describing the details of the master classes and a special offer for the attendees.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Scheduled Processing* in the *Monitoring & Automation* group of features: This feature gives you the ability to create schedules for automatic processing.
- On the *Leads* (CR301000) form, a list of leads has been added to the system.
- On the *Mass Emails* (CR308000) form, the mass email *SweetLife: SuperJuicer Online Master Class!* has been created.
- On the *Marketing Campaigns* (CR202000) form, the *Citrus Online Master Classes* marketing campaign has been created.
- On the *Marketing Lists* (CR204000) form, the *JCR20OFF* marketing list has been created.
- On the *Email Accounts* (SM204002) form, a system email account has been added.
- On the *Automation Schedules* (SM205020) form, a schedule for periodic runs of the *Send and Receive Email* process has been created.

Process Overview

In this activity, you will do the following:

1. On the *Marketing Campaigns* (CR202000) form, add multiple members to the *Citrus Online Master Classes* marketing campaign. These members will receive your mass email.
2. On the *Mass Emails* (CR308000) form, prepare the mass email to be sent to the members of the *Citrus Online Master Classes* marketing campaign.
3. On the *Mass Emails* form, send the mass email to the test email address to make sure that the email will be delivered to the recipients.

System Preparation

Before you start sending mass emails to the members of a marketing campaign, make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Adding Multiple Members to a Marketing Campaign

To add multiple members to the *Citrus Online Master Classes* marketing campaign from a marketing list, do the following:

1. On the *Marketing Campaigns* (CR202000) form, open the *Citrus Online Master Classes* marketing campaign.
2. Open the **Marketing Lists** tab.
3. In the **Selected** column, select the check box in the row with the *JCR20OFF* marketing list.

4. On the form toolbar, click **Save**.
5. In the **Confirmation** dialog box, which opens, click **Update** to update the campaign members.

The system automatically copies the members to the list of members on the **Members** tab from the *Citrus Juicers at a 20% Discount* marketing list. Notice that for these members, the name of the source marketing list has been added to the **Marketing List ID** column of the **Members** tab.

You have added multiple members to the marketing campaign. These members will receive your mass email when you prepare and send it.

Step 2: Preparing a Mass Email to Be Sent to the Members of the Marketing Campaign

To prepare a mass email to be sent to the members of the marketing campaign, do the following:

1. Open mass email *SweetLife: SuperJuicer Online Master Class!* on the **All Records** tab of the *Mass Emails* (CR308000) form.

   > Creating an email on the *Mass Emails* form is described in *Mass Emails: To Create and Send a Mass Email*.

2. On the **Summary** tab, specify the mass email settings as follows:
   a. In the **Source** box, select *Campaigns*.
   b. In the **Planned** box, specify the date when you plan to send this email, such as the current date.
3. On the **Campaigns** tab, in the table, select the **Selected** check box for the *Citrus Online Master Classes* marketing campaign. The members of this campaign will be added to the addressees of the mass email.
4. On the form toolbar, click **Save**.

You have prepared the mass email to be sent. Now you can test sending the email to make sure it will be delivered to the recipients.

Step 3: Sending a Mass Email to a Test Mailbox

To send a mass email to a test mailbox, do the following:

1. While you are still viewing the *SweetLife: SuperJuicer Online Master Class!* mass email on the *Mass Emails* (CR308000) form, on the form toolbar, click **Preview Message**.

   The system opens the *Email Activity* (CR306015) form in a pop-up window with a test message in which the following boxes are filled in as follows:

   - **From**: *marketing@sweetlife.example.com*
   - **To**: *system@sweetlife.example.com*

   Notice the *Draft* status of the message in the **Email Status** box on the **Details** tab.
2. On the form toolbar, click **Send**. The system sends the message and closes the window with the *Email Activity* form.
3. Open the **Messages** tab. In the table, the system has added a row that has the settings of the test message. In the **Email Status** column, notice the *Pending Processing* status of the message. As soon as the test email has been delivered to the test mailbox, the system changes the status to *Processed*.

> If a test email account has been configured in the system and the test message has been successfully delivered to your test mailbox, you can click **Send** on the form toolbar to send the mass emails to the members of the marketing campaign. For details, see *Configuring Email Accounts*.

Lesson 4: Qualifying Marketing Leads

In this lesson, you will learn how your marketing team can work with leads to move a prospective customer through the marketing qualification process.

> The activity that describes how to disqualify a lead is presented in both CRM Marketing Operations and CRM Sales Operations training guides. If you have completed the *Lead Qualification by Sales Teams: To Disqualify a Lead* activity in the CRM Sales Operations training guide, you need not complete the *Lead Qualification by Marketing Teams: To Disqualify a Lead* activity in this guide.

Lead Qualification by Marketing Teams: General Information

Marketing and sales teams rapidly adjust their processes and optimally use collected data, striving for the most effective work approaches. As such, they need their CRM systems to be flexible enough to support adjustments in processes without lengthy, costly development being required. Acumatica ERP provides flexible tools that marketing and sales teams can use to implement and customize workflows in the system without doing the coding.

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
- Qualify a lead and pass the marketing-qualified lead to a sales team for further qualification
- Disqualify a lead
- Reopen a disqualified lead

Applicable Scenarios

You may want to learn how to qualify leads in Acumatica ERP in scenarios that include the following:

- A lead has contacted you and confirmed the intention to buy the company's products or services and you need to convert the lead to an opportunity.
- A lead has expressed that its organization is not interested in your company's products or services, and you need to disqualify the lead.
- You have a list of cold leads (individuals or organizations who never contacted your organization or expressed any interest in your products or services) and you need to confirm these leads' contact information and gauge their current interest in buying.
- You need to pass a marketing-qualified lead to the sales team for further qualification.

Lead Qualification Process

Lead qualification is the process of determining a lead to be one of the following:

- A prospect that fits your target customer profile and has a high chance to become a customer
- An existing customer with interest in a product or service that this customer has not already purchased

When marketing personnel communicate with leads (for example, during marketing campaigns) and work on developing the leads' interest in the company's products or services, they establish qualification criteria, which show that some leads are interested to buy more than others. The particular lead qualification criteria vary for different companies and for different products or services. The number of leads that a marketing team passes to a sales team depends on many factors, such as the sales team's requirements for leads or the number of the leads a sales team can handle.

We recommend that marketing and sales teams work together to agree on the criteria of transferring leads from marketing to sales and regularly revise the criteria depending on company sales and other changing conditions. Based on this agreement, in Acumatica ERP, you can create your lead qualification workflow, which consists of stages (identifiable phases, which can be required or optional) in the workflow that relate to particular actions a marketing or a sales employee performs while qualifying each lead. Similarly, the lead proceeds through statuses in the system for each stage. The following sections describe this workflow and the ability to implement it in Acumatica ERP.

Lead Qualification as Performed by Marketing in Acumatica ERP

When a lead is created in Acumatica ERP, a marketing team member can review and nurture the lead. The team member can then either disqualify the lead or accept and qualify the lead and pass this marketing-qualified lead (MQL) to a sales team for further qualification (if the MQL is not ready to make a purchase). If the MQL is ready to buy, the marketing team member can convert the lead to an opportunity and skip the stage of lead qualification by sales.

A disqualified lead can be reopened if the lead starts showing interest in the company's products or services. Reopening the lead (rather than creating a new lead) helps you track the lead history and eliminate duplicates in the system.

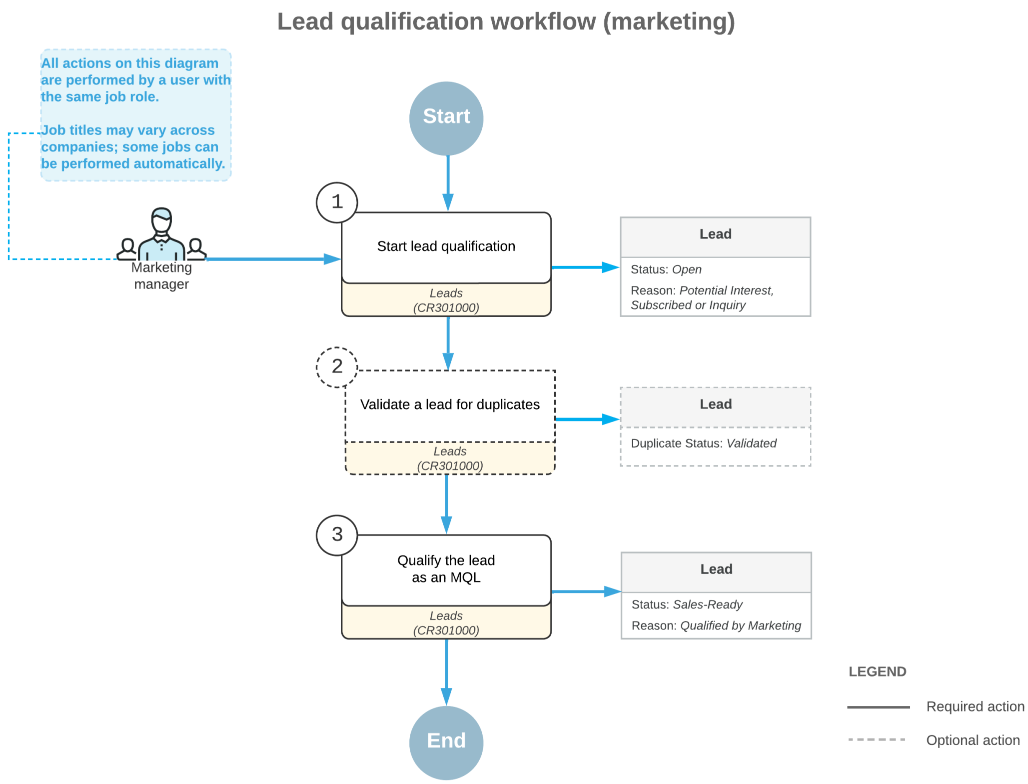
Lead qualification by a marketing team may include the following steps to move the lead through the needed stages:

- Starting the lead qualification process by clicking **Open** for the lead on the form toolbar of the *Leads* (CR301000) form
- Validating the lead for duplicates, as described in *Validating Records for Duplicates*
- Assigning the lead to an owner, as described in *Assigning Leads to Owners and Workgroups*
- Nurturing the lead, as described in *Managing Emails and Activities*, *Managing Marketing Campaigns*, and *Managing Mass Emails*
- Passing the lead to the sales team by clicking **Qualify** for the lead on the form toolbar of the *Leads* form
- Disqualifying the lead by clicking **Disqualify** for the lead on the More menu of the *Leads* form
- Reopening a lead that has been disqualified by clicking **Open** for the lead on the form toolbar of the *Leads* form

> Any of the stages listed above may be skipped as needed, depending on the company's lead qualification processes for marketing.

Lead Qualification Workflow (Marketing)

The following diagram illustrates the lead qualification workflow as performed by a marketing team.



Lead Scoring

Lead scoring, that may be part of the lead qualification process, helps you quickly and accurately assign a value to each lead based on various criteria. If you know where exactly leads are in your sales funnel, you can save time on working with leads of poor quality, develop more effective follow-up, and thus increase your return on investment. Calculating the marketing lead score can be done by members of a marketing team or automatically. Marketing teams can automate lead scoring and rating by using marketing automation solutions, such as *HubSpot*, and import marketing-qualified leads to Acumatica ERP.

Lead Qualification Statuses

As a lead is being processed by marketing and sales teams, it progresses through various statuses. Each lead status is displayed in the **Status** box in the Summary area of the *Leads* (CR301000) form.

In Acumatica ERP, a lead can be assigned one of the following statuses:

- *New*: The lead has been created in the system, but no work has been done on it yet.
- *Open*: The lead is being qualified by the marketing team.
- *Sales-Ready*: The lead has been qualified by a marketing team as showing more interest in the organization's products or services than other leads show.
- *Sales-Accepted*: The lead has been initially reviewed and accepted by the lead qualification team, and it is willing to communicate more with the sales team for further qualification.

- *Converted:* The lead has been qualified and converted to an opportunity. Once a lead has this status, most of the boxes on the *Leads* form are read-only; you can edit the value in only the **Description** box in the Summary area.
- *Disqualified*: The lead is showing no interest in the organization's products or services, or is not reachable (for example, the contact information is not valid). This status may also be used for leads that are duplicates of more correct or detailed leads. For more information about finding duplicates among CRM records in Acumatica ERP, see *Validating Records for Duplicates*.

If a lead has the *New*, *Open*, *Sales-Ready*, or *Sales-Accepted* status, the **Active** check box on the **CRM Info** tab of the *Leads* form is selected by default to indicate that the lead can be nurtured by a marketing or sales team. The system clears the check box if the lead has the *Converted* or *Disqualified* status.

The system updates the lead's status, and the **Status** box is unavailable for editing. A user can move the lead through statuses by clicking any of the following commands on the More menu or on the form toolbar of the *Leads* form and selecting a reason in the **Details** dialog box:

- **Open**: Changes the status to *Open*.
- **Qualify**: Changes the status to *Sales-Ready*.
- **Accept**: Changes the to *Sales-Accepted*.
- **Disqualify**: Changes the status to *Disqualified*.

You can also convert the lead to opportunity and change the lead status to *Converted* by clicking the **Convert to Opportunity** command on the More menu of the *Leads* form.

A system administrator can configure notifications related to changes in the lead status. For more information, see *Using Business Events*.

During lead qualification, some statuses may not be needed: For example, in a small company, the same team members might work with leads that are both ready for sales and accepted by sales, and thus one status could be used for leads that are turned over to sales, instead of two.

Lead Qualification by Marketing Teams: To Disqualify a Lead

The following activity demonstrates how to disqualify a lead in Acumatica ERP.

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.

Configuration Overview

In the *U100* dataset, for the purposes of this activity, the following tasks have been performed:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled.
- On the *Lead Classes* (CR207000) form, the *CAFE* class, which defines SweetLife's leads representing employees from cafes and restaurants, has been created.
- On the *Leads* (CR301000) form, the *John Livier* lead has been created.

Process Overview

In this process activity, you will disqualify a lead on the *Leads* (CR301000) form.

System Preparation

Before you start disqualifying a lead, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded, and sign in as marketing manager Bill Owen by using the following credentials:
   - **Username**: *owen*
   - **Password**: *123*
2. Make sure that on the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, the *SweetLife Head Office and Wholesale Center* branch is selected.

Step: Disqualifying a Lead

To disqualify the *John Livier* lead, do the following:

1. Open the *John Livier* lead record on the *Leads* (CR301000) form.
2. On the More menu, under **Processing**, click **Disqualify**.
3. In the **Details** dialog box, which opens, select the reason and confirm that you want to disqualify the lead as follows:
   a. In the **Reason** box, select *No Interest*.
   b. Click **OK**.

      The system closes the dialog box and changes the status of the lead to *Disqualified*. Most of the settings in the Summary area and on the **Contact Info**, **CRM Info**, **Attributes**, **Campaigns**, and **Opportunities** tabs have become unavailable for editing.

You have disqualified the lead.