

Consultant Course



C110 Case Management 2025 R1

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How to Use This Course

This course introduces you to the Acumatica ERP case management functionality based on a set of examples that illustrate configuration and support processes in a small company. The course consists of lessons that guide you step by step through the examples and explanations of the configuration and case management processes in Acumatica ERP.

What Is in This Guide

The guide includes the *Company Story* topic, implementation activities, and process activities. The *Company Story* topic explains the organizational structure of the company preconfigured in the *U100* dataset, as well as the company's business processes and requirements. Configuration lessons and process lessons make up the primary content of the guide.

Each implementation activity of the course is dedicated to a particular implementation scenario. Most of these activities are based on the *U100* dataset and consist of steps that you complete.

Each process activity of the course is dedicated to a particular user scenario and consists of processing steps that you complete.



The implementation activities and 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 Parts

The course is divided into two major parts:

- Part 1 includes the activities to be performed in the company with the *U100* dataset preloaded to configure case management functionality.
You have to read the general information and perform the implementation activities of this part to learn how to configure case management functionality in the company.
- Part 2 consists of process lessons and is dedicated to particular business processes in the case management functionality. You have to read the general information and complete the process activities of this part in a company with the *U100* dataset to learn how to perform basic customer support operations in a fully configured system.

What Is in a Configuration Lesson

A *configuration lesson*—that is, a lesson dedicated to the configuration of system settings and entities—provides a brief overview of the required system configuration and a description of other settings that could affect the configuration workflow.

Each configuration lesson includes at least one implementation activity that you have to complete in your Acumatica ERP instance to configure the core system settings or to prepare system entities.

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

To complete the lessons, sign in as the following users:

1. Part 1: Lessons 1-2: *gibbs*
2. Part 2: Lesson 3: *garcia*
3. Part 2: Lesson 4: *chubb*
4. Part 2: Lesson 5.1-5.2: *vega*
5. Part 2: Lesson 5.3: *garcia*
6. Part 2: Lesson 6: *chubb*

The password for each user is 123.

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.

Part 1: Configuring Case Management Functionality

In Part 1 of this training course, you will learn how to prepare the system for case management.

To complete the activities of Lessons 1–2 in this part, you will use a company with the *U100* dataset preloaded. This dataset provides a fully configured company with sample data that has been designed for this course. You will sign in to the system as an implementation consultant with the *gibbs* username.



The lessons of this part are independent: You can complete implementation activities in any order.

Configuring Case Management Functionality

You can perform the configuration of the case management functionality in Acumatica ERP when a basic company has been configured in the system and the initial CRM functionality has been configured for this basic company. The configuration of case management functionality includes enabling the required feature or features.

For more information about the initial configuration of the CRM functionality, see [Configuring CRM Functionality: General Information](#).

This topic provides an overview of the case management functionality and its configuration in Acumatica ERP.

Case Management in Acumatica ERP

Acumatica ERP provides tools for process automation, case management, and reporting for customer support teams. You can easily customize the case management functionality to fit your company's business goals, ensure higher profitability, and streamline your customer support processes.

The case management functionality gives your customer support personnel the ability to create support cases, assign cases to owners, and manage and process cases.

Workflow of the Case Management Implementation

You can implement the case management functionality after the initial CRM functionality has been configured for the basic company.

In order to use case management functionality, you need to enable the *Case Management* feature on the [Enable/Disable Features](#) (CS100000) form. This feature gives users the ability to create, assign, process, and resolve cases. You can also enable the *Case Management on Portal* feature (in the *Customer Portal* group of features) to give your customers the ability to add cases and track case processing through the Acumatica Self-Service Portal. This feature can be enabled only if the *Case Management* feature is enabled.

Lesson 1: Defining Case Classes

In this lesson you will learn about case classes in Acumatica ERP, and how an accurate classification of cases in case classes may help your support team work quickly and effectively manage your customer and internal cases.

Case Classes: General Information

In Acumatica ERP, you group cases into classes based on specific characteristics. Using case classes may help you effectively manage your customer support processes, such as distributing cases, collecting information to help with solving customers' problems related to your company's products or services, and preparing support reports to evaluate the performance of your support team.

This topic provides information about the creation and settings of case classes.

Learning Objectives

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

- Develop a general understanding of the settings for case classes
- Create a case class
- Specify the case class that the system will use by default for each new case
- Become familiar with modes of case billing
- For cases of the class, give users the ability to select the activity in which the solution to the case was provided
- Become familiar with attributes, which can be used for case classes

Applicable Scenarios

You may want to learn how to create case classes in scenarios that include the following:

- You need to give users the ability to group cases that represent customer requests of the same type, business area, or product, such as service requests, support tickets, or requests for information about products or services.
- You need to give users the ability to group cases that represent requests submitted by employees of a particular customer.
- You need to set up the system to automatically assign new cases to the appropriate owners.

Case Classes

In Acumatica ERP, a case class is a grouping entity for cases that share at least one common characteristic. Case classes help you gather different sets of additional information about the cases in each class, and they can be used for reporting purposes and for providing default values during the data entry of individual cases.

You can define case classes on the [Case Classes](#) (CR206000) form based on your company's business needs. You need to enable the *Case Management* feature on the [Enable/Disable Features](#) (CS100000) form to have an ability to create and manage case classes. Case classes help you quickly do the following:

- Specify default settings for cases of a class, including billing settings
- Distribute cases between owners
- Specify the work calendar to be used for cases of the class
- Set up the ability for a user to mark an activity, event, task, or email as including a case solution for a case of the class

Case classes also make the creation of cases faster and more accurate. When a user is creating a case on the [Cases](#) (CR306000) form and selects a case class in the Summary area of the form, the system fills in the values that have been specified for the class; these default values can be overridden, if needed.

On the [Case Classes](#) form, you can specify the following settings for each case class:

- The identifier and description of the case class.
- The work calendar.
- The default email account that can be used for sending emails to customers who have contacted your customer service team.
- The billing modes, which are *Per Case* or *Per Activity*. For details, see [Case Classes: Modes of Case Billing](#).
- The labor items that represent a particular type of employee labor, such as the work done by a consultant or a technician, and are used for recording the hourly rates of employees, the general ledger accounts to be used, and the applicable taxes. For details, see [Case Classes: Modes of Case Billing](#).
- The billable time settings.
- The ability for users to mark an activity, event, task, or email as including a case solution for a case of the class.
- The period in days during which a case of the class can be reopened.
- The attributes specific to the case class, as well as whether they are required or optional.

You can give users the ability to create internal cases in the system and through the Self-Service Portal and submit these cases to employees from such teams as IT or legal team. To do this, on the **Details** tab of the [Case Classes](#) form, for a case class that defines these cases, you select the **Allow Selecting Employee as Case Contact** check box.

You may want to provide your customer support team with the ability to mark an activity, task, event, or email as including a case solution for a case of the class. If you select the **Track Solutions in Activities** check box on the [Case Classes](#) form for a case class, then the **Solution Provided In** box appears on the [Cases](#) (CR306000) form for a case of this class. In this box, you can select the case-related activity that includes the solution for this case if the **Case Solution Provided** check box is selected for this activity on its data entry form.



The **Case Solution Provided** check box appears on the [Activity](#) (CR306010), [Task](#) (CR306020), [Event](#) (CR306030), and [Email Activity](#) (CR306015) forms if the **Track Solutions in Activities** check box is selected on the [Case Classes](#) form for the class of the case that is associated with the activity.

On the **General** tab of the [Customer Management Preferences](#) (CR101000) form (**Data Entry Settings** section), you can specify the default case class that the system will insert for each case that you create in the system. Specifying this default class may be useful if a particular case class is used far more than the others. If you select a default case class, when a user creates a case by using the [Cases](#) form, the system inserts this class into the **Case Class** box of the Summary area, and inserts the default settings associated with the case class. If the user changes the default case class, the system inserts the default settings specified for the newly selected class.

If your company no longer needs a particular case class, you can remove it from the system only if no existing cases have this case class specified.

Example of Case Classes and Attributes in Case Classes

For each case class, you can define a set of attributes that give users the ability to specify additional information about cases within the class. An attribute is a characteristic or quality—such as industry, number of employees, or interest—that is important to your company but is not already tracked on the [Cases](#) form. When a user selects a case class for a new case, the attributes of this class appear on the **Attributes** tab of the [Cases](#) form as additional elements for which the user specifies the appropriate values; for the required attributes, the user must specify values.

If you define an attribute as required in a case class and plan to create cases through the Self-Service Portal, you should define a default value for the required attribute in the case class; otherwise, you will not be able to save the case in the Self-Service Portal.

For each attribute, you can define the type of control that represents it in the UI (check box, text box, or combo box) and specify the possible values, if applicable. For more information about the use of attributes in Acumatica ERP, see [Attributes](#).

Consider the following example of the use of case classes and attributes.



Attributes and classes are used similarly for leads, contacts, business accounts, marketing campaigns, opportunities, and cases.

Suppose that you sell juicers and provide training services to customers on how to clean and maintain the juicers. You handle many cases and would like to divide them into groups based on whether they are related to the maintenance of the juicers by the company or to providing training to customers about the maintenance of the juicers. You can create two classes for these cases:

- The *Training* class, for cases associated with requests from customers for providing training about the juicers' maintenance: This class might contain an attribute called **Size** with the values *Small*, *Midsized*, and *Big*, corresponding to the expected audience for training.
- The *Maintenance* class, for cases associated with customer requests for the maintenance of juicers: The class might contain the attribute **Model**, which might have such values as *Juicer05*, *Juicer10*, *Juicer15*, and *Juicer20*.

With these classes and their attributes configured in the system, when a user creates a new case on the [Cases](#) (CR306000) form and selects a case class in the **Case Class** box of the Summary area, the attributes of the class appear on the **Attributes** tab. The user can enter the needed attribute values for this case.

Case Classes: Modes of Case Billing

In Acumatica ERP, you can select the mode of billing a customer—for a case or for each activity associated with a case—for each case class. If the *Time Management* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, you can select a billing mode in the **Billing Mode** box on the **Details** tab of the [Case Classes](#) (CR206000) form, and the mode determines how cases of the class are billed. If the feature is disabled, the system automatically assigns the *Per Case* billing mode to every new case class, and you can bill a customer only for a case.

With the *Time Management* feature enabled, for the case class, you select one of the following modes of case billing:

- *Per Case*: You select this mode if you want a case of the class to be billed after it is closed. The total amount in an invoice for the work done will include all activities associated with the case.

If the *Contract Management* feature is enabled on the [Enable/Disable Features](#) form, you can select the **Require Contract** box on the **Details** tab of the [Case Classes](#) form, and the system will require a contract to be specified for each case of the class.

Also, you can specify a labor item and an overtime labor item for the class in the **Labor Item** and the **Overtime Labor Item** box, respectively, on the **Details** tab of the form.

- *Per Activity*: You select this mode if you want to bill individual activities associated with each case of the class. You can use this option for case classes that you select for long-lasting cases that cannot be closed by the end of the billing period.

If the *Contract Management* feature is enabled on the [Enable/Disable Features](#) form, the system selects the **Require Contract** box and makes it unavailable for editing; with this setting, a user must specify a contract for each case of the class in the **Contract** box on the **CRM Info** tab of the [Cases](#) (CR306000) form.

Also, when this mode is selected, the **Labor Items** tab appears on the [Case Classes](#) form. On this tab, you can specify the labor items to be used for specific earning types. The system will use labor items as sources of general ledger accounts to be used for transactions; for details, see [Labor Items: General Information](#).

Case Classes: Implementation Activity

The following implementation activity will show you how to create a case class.

Story

Suppose that you are an implementation consultant for the SweetLife Fruits & Jams company. You need to create a new case class, *JMAINT*, for cases that represent customer requests for maintenance of juicers. You also need to define the default class to be specified for each newly created case.

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*
 - *Case Management* in the *Customer Management* group of features
 - *Time Management*
- On the [Non-Stock Items](#) (IN202000) form, the *TECHNICIAN* non-stock item of the *Labor* type, which represents the labor of SweetLife's specialists who repair and maintain juicers, has been created.
- On the [Labor Rates](#) (PM209900) form, the labor cost rate associated with the *TECHNICIAN* non-stock item of the *Labor* type has been created.
- On the [Attributes](#) (CS205000) form, the *MODEL* attribute, which holds the value of the model of a juicer, has been created.

Process Overview

In this activity, you will do the following:

1. Create a case class on the [Case Classes](#) (CR206000) form
2. Specify the created class as the default case class on the [Customer Management Preferences](#) (CR101000) form
3. Create a new case with the default case class on the [Cases](#) (CR306000) form

System Preparation

Before you start creating a case class, you should do the following:

1. Launch the Acumatica ERP website with the *U100* dataset preloaded.
2. Sign in to the system as implementation consultant Kimberly Gibbs by using the following credentials:
 - **Username:** *gibbs*
 - **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 Case Class

To create the *JMAINT* case class, do the following:

1. On the [Case Classes](#) (CR206000) form, add a new record.
2. In the Summary area, do the following:
 - a. In the **Case Class ID** box, enter the new class identifier: *JMAINT*.
 - b. In the **Description** box, type the following brief description of the class: *Maintenance of juicers*.
 - c. To hide all records of the class from the Self-Service Portal users, select the **Internal** check box.
3. On the **Details** tab of the form, do the following:
 - a. In the **Default Email Account** box, select *SweetLife Support* (the name of the *support@sweetlife.example.com* email account).
 - b. Select the **Billable** check box. Notice that the system has selected the **Require Customer** check box and made it unavailable for changing, which means that each time a user creates a case of the class, the system requires the user to specify a business account of the *Customer* type for the case.
 - c. Select the **Enable Billable Option Override** check box to give users the ability to override the default selection of the **Billable** check box for cases of the class.
 - d. In the **Billing Mode** box, select *Per Case*.
 - e. In the **Overtime Labor Item** box, select *TECHNICIAN*.
 - f. In the **Labor Item** box, select *TECHNICIAN*.
 - g. In the **Min. Billable Time** box, select *1:00*.
 - h. In the **Round Time By** box, type: *1 : 00*.
4. On the **Attributes** tab, do the following:
 - a. On the table toolbar, click **Add Row**.
 - b. In the **Attribute ID** column, select *MODEL*.
5. On the form toolbar, click **Save**.

You have created the new case class.

Step 2: Specifying the Default Case Class

To select the *JMAINT* case class as the default class the system automatically inserts for newly created cases, do the following:

1. Open the [Customer Management Preferences](#) (CR101000) form.
2. On the **General** tab (**Data Entry Settings** section), in the **Default Case Class** box, select the *JMAINT* case class, which you have created in the previous step of this activity.
3. On the form toolbar, click **Save**.

You have specified the default case class. For each newly created case, in the Summary area of the [Cases](#) (CR306000) form, the system will insert *JMAINT* into the **Case Class** box.

Step 3: Creating a New Case of the Default Case Class

To ensure that a new case is created with the default *JMAINT* case class inserted, do the following

1. On the [Cases](#) (CR306000) form, add a new record.
2. Check the value in the **Case Class** box of the Summary area.

The *JMAINT* case class is inserted by default. You can override the default case class, if needed.

Lesson 2: Configuring Case Assignment Maps

In this lesson, you will learn how to configure case assignment maps to make the process of assigning records to owners faster and more effective.

Assignment Maps: General Information

Assignment maps in Acumatica ERP give marketing, sales, and support personnel the ability to appropriately distribute processed records—such as leads, opportunities, or cases—between owners (individuals) and workgroups (groups of people). When a user uses a processing form for mass assignment, the system uses rules and conditions specified in an assignment map.

Learning Objectives

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

- Become familiar with the principles and workflow of configuring assignment maps
- Create an assignment maps for different entities
- Specify a default assignment maps for different entities in the system

Applicable Scenarios

You may want to configure an assignment map in scenarios that include the following:

- You are an implementation consultant, and you need to give users the ability to distribute leads that represent various industries or businesses between your company employees.
- You are an implementation consultant, and you need to give users the ability to distribute opportunities for selling various kinds of products or services your company offers.
- You are an implementation consultant, and you need to give users the ability to distribute various cases—such as cases for presales questions, cases for sale and delivery of company products, and cases for maintenance and repair.

Assignment Maps

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. You can configure assignment maps for distributing leads, contacts, business accounts, opportunities, cases, and email activities. You can create multiple assignment maps for the same entity, such as a lead or opportunity. You create assignment maps on the [Assignment Maps](#) (EP205010) form.

An assignment map may include any number of rules, which are executed sequentially. You create rules as follows:

1. On the **Rules** tree, you add a rule. Each rule in an assignment map includes conditions and actions to be performed if the conditions are met. Rules should divide records of the same type into non-intersecting sets. If rules allow the same records to be assigned to two or more groups, all assignments will be performed in the workgroup or individual employee that is mentioned higher in the list of rules, and the records will never reach the second workgroup or employee.
2. On the **Conditions** tab, you add rule conditions that assignment criteria should meet. Conditions, which are specified for each rule, are based on the values of settings in records. Settings are specified manually by a user or automatically by the system on the data entry form when a record is created. For classes that

are used to group records, particular attributes can be specified; users can specify the attribute values in records (such as leads) on the data entry form used to create the record.

3. On the **Rule Actions** tab, you select an owner or a workgroup (or both).

If a condition or rule is no longer required in an assignment map, but you want to keep it in the list of rules, you can temporarily deactivate it by clearing the **Active** check box in the settings of that condition or rule on the [Assignment Maps](#) form. The name of an inactive rule is preceded with the *(Inactive)* prefix in the **Rules** pane.

After you have configured the assignment map for distributing leads, contacts, business accounts, opportunities, or cases, you should specify the map for the needed entity on the **General** tab (**Assignment Settings** section) [Customer Management Preferences](#) (CR101000) form. The maps that you specify on this form are used for the mass assignment of records, as described in the next section.

You can also specify the assignment map for any entity class on the [Lead Classes](#) (CR207000), [Contact Classes](#) (CR205000), [Business Account Classes](#) (CR208000), or [Opportunity Classes](#) (CR209000) form. If an assignment map is specified for any of these classes, the system uses this assignment map to assign the default owner of a new record of this class if *Assignment Map* is specified in the **Default Owner** box of the class creation form.

After you have configured the assignment map for distributing email activities, you need to specify this map in the **Email Assignment Map** box on the **Assignment Settings** tab of the [Email Accounts](#) (SM204002) form to cause the system to determine the owners for email activities according this assignment map for email activities.

Mass Assignment of Records

The system uses assignment maps when a user performs mass assignment of records on the following forms:

- [Assign Leads](#) (CR503010)
- [Assign Contacts](#) (CR503011)
- [Assign Business Accounts](#) (CR503310)
- [Assign Opportunities](#) (CR503110)
- [Assign Cases](#) (CR503210)

For a particular record that is included in mass processing, the system uses an assignment map to determine its owner. The system uses the assignment map specified for leads, contacts, business accounts, opportunities, or cases on the [Customer Management Preferences](#) (CR101000) form (**Assignment Settings** section of the **General** tab).

Assignment Maps: To Configure a Case Assignment Map

The following implementation activity will show you how to configure a case assignment map in Acumatica ERP.

Story

You need to configure a case assignment map in Acumatica ERP in order to provide the customer support team with the ability to assign cases to owners as follows:

- The employee *David Chubb*, a sales manager in SweetLife, will be working with cases for presales questions from potential clients and customers.
- The *Delivery* workgroup will be working with cases for sale and delivery of company products, such as jam, fruits, and juicers.
- The *Technical Support* workgroup will be working with cases for cleaning, maintenance, and repair of juicers. This workgroup will also help answer all kinds of technical questions from potential clients and customers.

Configuration Overview

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

- On the [Employees](#) (EP203000) form, the following employees have been created:
 - *Marcos Garcia*
 - *Jeffrey Vega*
 - *David Chubb*
- On the [Company Tree](#) (EP204061) form, the company tree has been configured, and it includes the *Delivery* and the *Technical Support* workgroups in the *After-Sales* department.
- On the [Case Classes](#) (CR206000) form, the *PRESALE*, *DELIVERY*, and *JREPAIR* case classes have been created.

Process Overview

In this activity, you will do the following:

1. Create a case assignment map on the [Assignment Maps](#) (EP205010) form.
2. Select the default case assignment map on the [Customer Management Preferences](#) (CR101000) form.
3. Assign cases to the owner on the [Assign Cases](#) (CR503210) form; make sure that cases are assigned according to the default case assignment map.

System Preparation

Before you start configuring a case assignment map, 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 Case Assignment Map

To create a case assignment map, do the following:

1. Open the [Assignment and Approval Maps](#) (EP205500) form.
2. On the form toolbar, click **Add Assignment Map**. A new assignment map opens on the [Assignment Maps](#) (EP205010) form.
3. In the Summary area of the form, do the following:
 - a. In the **Name** box, type `Default Case Assignment Map`.
 - b. In the **Entity Type** box, select *Cases*.
4. In the **Rules** tree, click **Add Rule** to add the rule for distributing the cases of the *PRESALE* class.
5. On the **Conditions** tab, do the following:
 - a. In the **Description** box, type `Presales Requests`.
 - b. Make sure that the **Active** check box is selected.
 - c. On the table toolbar, click **Add Row**.
 - d. In the **Entity** box, select *Case*.
 - e. In the **Field Name** box, select *Case Class*.
 - f. In the **Condition** box, select *Equals*.
 - g. In the **Value** box, select *PRESALE*.
6. On the **Rule Actions** tab, do the following:

- a. In the **Assign Ownership To** box, select *Employee*.
 - b. In the **Employee** box, select *David Chubb*.
7. In the **Rules** tree, click **Add Rule** to add the rule for distributing the cases of the *DELIVERY* class.
8. On the **Conditions** tab, do the following:
 - a. In the **Description** box, type *Sales and Delivery*.
 - b. Make sure that the **Active** check box is selected.
 - c. On the table toolbar, click **Add Row**.
 - d. In the **Entity** box, select *Case*.
 - e. In the **Field Name** box, select *Case Class*.
 - f. In the **Condition** box, select *Equals*.
 - g. In the **Value** box, select *DELIVERY*.
9. On the **Rule Actions** tab, do the following:
 - a. In the **Assign Ownership To** box, select *Employee*.
 - b. In the **Workgroup** box, select *Delivery* as follows:
 - a. Click the magnifier button.
 - b. In the dialog box that contains the company tree select **After-Sales > Delivery**.
 - c. Double click *Delivery* to cause the system to close the dialog box and insert this value in the **Workgroup** box.
10. In the **Rules** tree, click **Add Rule** to add the rule for distributing the cases of the *JREPAIR* class.
11. On the **Conditions** tab, do the following:
 - a. In the **Description** box, type *Repair and Maintenance*.
 - b. Make sure that the **Active** check box is selected.
 - c. On the table toolbar, click **Add Row**.
 - d. In the **Entity** box, select *Case*.
 - e. In the **Field Name** box, select *Case Class*.
 - f. In the **Condition** box, select *Equals*.
 - g. In the **Value** box, select *JREPAIR*.
12. On the **Rule Actions** tab, do the following:
 - a. In the **Assign Ownership To** box, select *Employee*.
 - b. In the **Workgroup** box, select *Technical Support* as follows:
 - a. Click the magnifier button.
 - b. In the dialog box that contains the company tree select **After-Sales > Technical Support**.
 - c. Double click *Technical Support* to cause the system to close the dialog box and insert this value in the **Workgroup** box.
13. On the form toolbar, click **Save**.

You have created and configured *Default Case Assignment Map*, as shown in the following screenshot. Now you need to specify this map on the [Customer Management Preferences](#) (CR101000) form.

Assignment Maps

Map: Default Case Assignment Map Entity Type: Cases

* Name: Default Case Assignment Map

Rules

- Presales Requests
- Sales and Delivery
- Repair and Maintenance

CONDITIONS

* Description: Repair and Maintenance

☒ Active

Activ	Brac	*Entity	*Field Name	*Cor	Value	Value 2	Brac	Oper
>	<input checked="" type="checkbox"/>	-	Case	Case Class	Equals	JREPAIR	-	And

Figure: The created case assignment map

Step 2: Selecting a Default Case Assignment Map

To select a default case assignment map, do the following:

1. Open the [Customer Management Preferences](#) (CR101000) form.
2. On the **General** tab, in the **Case Assignment Map** box of the **Assignment Settings** section, select *Default Case Assignment Map*.
3. On the form toolbar, click **Save**.

You have selected the *Default Case Assignment Map* as the default case assignment map. Now users can mass-assign cases of the *PRESALE*, *DELIVERY* and *JREPAIR* case classes on the [Assign Cases](#) (CR503210) form, and the system will distribute these cases according to the rules in this assignment map.

Part 2: Case Management

In Part 2 of this training course, you will learn how to use Acumatica ERP to complete the following basic tasks that may usually be performed by a customer support team:

- Creating cases
- Assigning cases to owners and workgroups
- Managing cases
- Submitting cases to internal teams

Activities in this part are to be completed under a user account of a delivery manager, a sales manager, or a technician. You can find the credentials to use for sign in to the prepared *U100* tenant in the [How to Use This Course](#).



The lessons of this part are independent: You can complete activities in any order.

Lesson 3: Creating Cases

In this lesson, you will learn how to create cases in different ways.

Cases: General Information

Cases (also referred to as *support cases* or *tickets*) help your company track customer requests, questions, problems, and other inquiries submitted by email, phone, website, or live chat and find the solutions requested by your customers. Acumatica ERP gives you the ability to easily create and track cases based on your customers' requests. This topic provides information about creating cases in Acumatica ERP.

Learning Objectives

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

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

Applicable Scenarios

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

- You have received a request from your customer about your company's products or services and need to create a case in the system.
- Your customer has created a case on the Acumatica Self-Service Portal, and you need to solve the customer's problem related to the product or service that your company offers.

Creation of Cases in Acumatica ERP

In Acumatica ERP, a case is a record created and viewed on the [Cases](#) (CR306000) form that represents a new, open, or closed request from a customer or employee. The case has a variety of settings, such as the customer, the status of the case, and the user responsible for the case (that is, the owner of the case).

A case can be created in any of the following ways:

- By a user manually entering the case data on the [Cases](#) form.
- By a customer using the Acumatica Self-Service Portal.
- By an employee using the Acumatica Self-Service Portal.
- By a user through the Acumatica mobile app.
- By a user through the Acumatica add-in for Outlook.
- Through import scenarios to import lists of cases on the [Import by Scenario](#) (SM206036) form. You can use the predefined *Import Cases from Excel* import scenario.

Settings of a Case

You can enter, view, and modify (if applicable) the following case settings on the [Cases](#) (CR306000) form:

- In the Summary area, basic settings, such as the case's ID, date reported, case class, customer, contact, owner, status, reason, subject, and priority. You can also specify the severity of the case, which may also relate to a time requirement.

In the **Contact** box, you can select a case contact among contacts and employees. You can select an employee as a case contact for a case of a class if on the [Case Classes](#) (CR206000) form, the **Allow Selecting Employee as Case Contact** check box is selected for the class.

- On the **Details** tab, the description of the case.
- On the **CRM Info** tab, the customer settings, such as the workgroup, billing settings (billable time and billable overtime), time-related settings (total work hours and overtime hours spent on the case) and the activity statistics. For details about billing, see [Case Management: Billable Cases](#).

You can also specify a contract or default contract if the *Contract Management* feature has been enabled on the [Enable/Disable Features](#) (CS100000) form. Contract cases require specifying a contract on entry, and standalone cases require specification of the customer and the customer's case class, which determines the default contract. For details, see [Case Management: Billable Cases](#).

- On the **Attributes** tab, the list of attributes, if they have been defined for the case class on the [Case Classes](#) form. Attributes may be used to help your company manage specific information that is useful for its business, such as the industry or number of employees in a customer company.
- On the **Activities** tab, emails, tasks, events, and activities associated with the case. You can use this tab as a starting point for adding activities and for viewing the activities that have been performed.
- On the **Related Cases** tab, the list of cases that block, depend on, are duplicates of, or are otherwise associated with this particular case (if any). For details, see [Case Management: General Information](#).
- On the **Relations** tab, the list of records related to the case. You can also use this tab to quickly create an entity associated with the case. For details, see [Managing Relations](#).
- On the **Closure Notes** tab, the case-related information. You can add, edit, and delete the information on this tab at any time.

The Initial Activity of a Case

At the moment of a case's creation, the system checks whether the case has been created based on an initial activity, such as an incoming email. If no initial activity is found, the system automatically creates an activity of the *System* type on the [Activity](#) (CR306010) form and associates it with the case.

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](#).

Cases: To Create a Case Manually

The following activity demonstrates how to manually create a case and specify basic settings for this case.

Story

Suppose that you are a customer service representative of the SweetLife Fruits & Jams company. You have received a phone call from your customer, Kevin Grey, who is a buyer at the Groceriex chain of supermarkets in New York. Kevin ordered 25 jars each of apple, orange, and cherry jam, but only 15 jars of orange jam were delivered. (The other jams were delivered in full.) You need to arrange the delivery of 10 jars of orange jam to Groceriex within three working days.

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.
 - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the [Attributes](#) (CS205000) form, the *PRODUCT* attribute for cases has been created.
- On the [Case Classes](#) (CR206000) form, the *DELIVERY* case class, which defines cases related to the sale and delivery of products, has been created.
- In the Summary area of the [Cases](#) (CR306000) form, the **User-Defined Fields** tab, which holds the values of attributes, has been added.

Process Overview

In this activity, you will manually create a case on the [Cases](#) (CR306000) form.

System Preparation

Before you start creating a case manually, you should do the following:

1. Sign in to the system as delivery manager Marcos Garcia by using the following credentials:
 - **Username:** *garcia*
 - **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 a Case Manually

To manually create a case for the request submitted by Kevin Grey of *GROCERIE*X, do the following:

1. On the [Cases](#) (CR306000) form, add a new record.
2. In the Summary area (**Document** tab), do the following:
 - a. In the **Case Class** box, select *DELIVERY*.
 - b. In the **Business Account** box, select *GROCERIE*X.
 - c. In the **Contact** box, select *Kevin Grey*.
 - d. In the **Subject** box, type *Delivery of the missing 10 jars of orange jam*.
 - e. In the **Severity** box, select *Low*.
 - f. In the **Priority** box, select **Medium**.
3. On the **User-Defined Fields** tab of the Summary area, in the **Products for sale** box, select *Orange jam 96 oz*.
Products for sale is the description of the *PRODUCTS* attribute that was defined for the case class; the description of an attribute is used as its name on the UI.
4. On the **Details** tab of the form, in the text area, type *10 jars of orange jam were not delivered to GROCERIE*X.
5. On the form toolbar, click **Save**.

You have created a case based on the request from the existing *GROCERIE*X customer, as shown in the following screenshot.

The screenshot displays the Acumatica ERP Case Management interface. At the top, the case title is "000012 - Delivery of the missing 10 jars of orange jam". Below the title is a toolbar with icons for navigation and actions, including a green "OPEN" button. The interface is divided into two main sections: "DOCUMENT" and "USER-DEFINED FIELDS".

The "DOCUMENT" section contains the following fields:

- Case ID: 000012
- * Case Class: DELIVERY - Sale and delivery of prod
- Status: New
- Reason: Unassigned
- * Subject: Delivery of the missing 10 jars of orange jam

The "USER-DEFINED FIELDS" section contains the following fields:

- * Business Account: GROCERIE - Groceriex
- Location: (empty)
- * Contact: Kevin Grey
- Owner: (empty)
- Reported On: 9/1/2025 12:00 AM
- Severity: Low
- Priority: Medium

Below the "DOCUMENT" and "USER-DEFINED FIELDS" sections is a tabbed interface with tabs for "DETAILS", "CRM INFO", "ATTRIBUTES", "ACTIVITIES", "RELATED CASES", "RELATIONS", and "CLOSURE NOTES". The "DETAILS" tab is currently selected, showing a text area with the content "10 jars of orange jam were not delivered to GROCERIE". The text area has a rich text toolbar with various formatting options like bold, italic, underline, and color.

Figure: The case based on the customer's request

Lesson 4: Assigning Cases to Owners and Workgroups

In this lesson, you will learn how cases can be assigned to owners and what settings make the assignment easier.

Case Assignment to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the case workload within the company. You can use assignment maps to indicate to the system how to assign cases to individuals or groups of people (that is, to

owners or workgroups). In the following sections, you will find information about assigning cases 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 case manually to a particular owner
- Assign a selected group of cases to owners or workgroups by using a case assignment map

Applicable Scenarios

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

- You need to manually assign or reassign a case to another owner or workgroup.
- You need to assign a selected group of cases to owners by using a case assignment map.

Assignment of Cases to Owners and Workgroups in Acumatica ERP

In Acumatica ERP, you can easily base the rules for case assignment on company policies. Cases can be assigned to owners or workgroups in many different ways, based on the settings and attributes of the case records being assigned. You can assign cases manually or automatically by using a case assignment map.

You can manually assign an individual case to an owner or workgroup. When you create or edit the case on the [Cases](#) (CR306000) form, you can select an owner in the **Owner** box of the Summary area. Also you can assign a case to yourself by clicking **Take Case** on the form toolbar or on the More menu. To assign a case to a workgroup, you select a workgroup in the **Workgroup** box (on the **CRM Info** tab of the [Cases](#) 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 cases that do not have owners specified by using the [Assign Cases](#) (CR503210) mass processing form. On this form, you can assign selected cases or all cases that do not have owners, and the system uses the case assignment map specified in the **Case Assignment Map** box (in the **Assignment Settings** section of the **General** tab) of the [Customer Management Preferences](#) (CR101000) form to determine the owners of the cases.

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

1. Create a company tree on the [Company Tree](#) (EP204061) form to be able to assign cases to workgroups or to owners in these workgroups (see the following section).
2. Create the needed maps for the automatic assignment of cases 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](#).

You can manually change the owner of a case that has been manually or automatically assigned in one of the following ways:

- If a case is not assigned to any workgroup, you can select a new owner in the **Owner** box from the list of all employees.
- If a case 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.

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 Cases by Using Assignment Maps

You can use the assignment map functionality to distribute cases between owners automatically or manually when you mass-assign cases.

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).

Execution Errors Related to the Mass-Assignment of Cases

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 cases that should be assigned according to this assignment map by using the [Assign Cases](#) (CR503210) 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 the **Message** column, the system displays the text of the error message.

Notifications About Assigning a Case to an Owner

In Acumatica ERP, an administrator can set up email notifications on the [Business Events](#) (SM302050) form so that if a user is assigned to a new case, this user receives a notification by email, by SMS, or in the Acumatica mobile app. For details, see [Business Events: Subscribers](#).

Case Assignment to Owners and Workgroups: Process Activity

The following activity demonstrates how to assign cases to owners. You will practice assigning cases to the appropriate owners, both manually for an individual case and by using the mass processing form to assign multiple cases to the needed owners.

Story

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

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

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.
 - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the [Case Classes](#) (CR206000) form, the *PRESALE*, *DELIVERY*, and *JREPAIR* case classes have been created.
- On the [Assignment Maps](#) (EP205010) form, the *Case Assignment Map* has been created. According to the rules (and their conditions and actions) specified in this assignment map, cases are assigned as follows:
 - The cases of the *PRESALE* case class are assigned to David Chubb.
 - The cases of the *DELIVERY* case class are assigned to the *Delivery* workgroup in the *SweetLife After-Sales* department.
 - The cases of the *JREPAIR* case class are assigned to the *Technical Support* workgroup in the *After-Sales* department.
- On the [Cases](#) (CR306000) form, the case that has the *Repair of a juicer for Delicious Energy Restaurant* subject has been created.

Process Overview

In this activity, you will do the following:

1. On the [Cases](#) (CR306000) form, manually assign a particular case to an owner.
2. On the [Assign Cases](#) (CR503210) form, assign all the unassigned cases to owners.

System Preparation

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

1. Sign in to the system as sales manager David Chubb by using the following credentials:
 - **Username:** *chubb*
 - **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.
3. Make sure that on the [Customer Management Preferences](#) (CR101000) form (in the **Case Assignment Map** box of the **Assignment Settings** section of the **General** tab), *Case 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 cases.

Step 1: Assigning a Case to an Owner

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

1. Open the *Repair of a juicer for Delicious Energy Restaurant* case on the [Cases](#) (CR306000) form.
2. In the **Owner** box of the Summary area, select *Jeffrey Vega*.
3. On the form toolbar, click **Save**.

You have manually assigned a case to an owner.

Step 2: Assigning the Unassigned Cases to Owners and Workgroups

Suppose that you need to assign all the currently unassigned cases to owners and workgroups.

To mass-assign cases to owners, do the following:

1. Open the [Assign Cases](#) (CR503210) form, which lists all the cases with the **Active** check box selected on the **CRM Info** tab of the [Cases](#) (CR306000) 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 cases:
 - a. Select the *Is Empty* filter condition.
 - b. Click **OK**. The system closes the dialog box and applies the filter.
4. On the form toolbar, click **Process All**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning cases.



In situations when you want to assign only selected cases to owners, you would select unlabeled check boxes in the table for the needed cases and click the **Process** button on the form toolbar.

Based on the settings specified for the *Case Assignment Map* on the [Assignment Maps](#) (EP205010) form in the *U100* dataset, all the selected cases have been assigned to the *Delivery* workgroup, the *Technical Support* workgroup, or David Chubb.



If an assignment map contains errors, the system will list these errors in the **Processing** dialog box. You can view the errors by clicking the More button on the **Errors** tile: In the **Message** column, the system displays the text of each applicable error message.

5. Click **Close** to close the dialog box and return to the form. The system has cleared the filter that you applied to the **Owner** column and now lists all the cases. For the cases that had not been assigned to owners or workgroups, the system has inserted either the name of the workgroup in the **Workgroup** column or *David Chubb* in the **Owner** column, as shown in the following screenshot.

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

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

You have assigned the unassigned cases to owners or workgroups, with the system using the rules specified in the case assignment map.

Lesson 5: Managing Cases

In this lesson, you will learn how to manage billable and non-billable cases and create a return order based on a case.

Case Management: General Information

Acumatica ERP provides tools that help your customer support team create, track, reassign, escalate, and resolve cases.

Learning Objectives

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

- Make optimal use of the case management capabilities of Acumatica ERP
- Develop a general understanding of billing settings for a case and case-related activities
- Process a case and notice its statuses
- Create an email and an activity associated with a case
- Reassign a case to another owner
- Escalate a case to another employee
- Specify a case-related activity with a solution for a case
- Create a return order from a case
- Become familiar with ways of associating a case with other cases
- Prepare and review an accounts receivable invoice for a case

Applicable Scenarios

You may want to learn how to manage cases in Acumatica ERP in scenarios that include the following:

- You have investigated the issue related to a case and need to record your work on the case.
- You had sent a request to clarify the information related to a case, but the customer did not answer before you left for vacation. Then you received the clarifying information on the case from the customer, but because you are on vacation, your manager needs to reassign it to another owner to continue work on the case.
- You have explored a case and decided to escalate it to another employee or team with more information related to the issue in the case and a greater likelihood of resolving it quickly.
- You have resolved a case and need to bill the customer for the work performed on it.
- You need to understand how many cases your team has in the backlog.

Case Management in Acumatica ERP

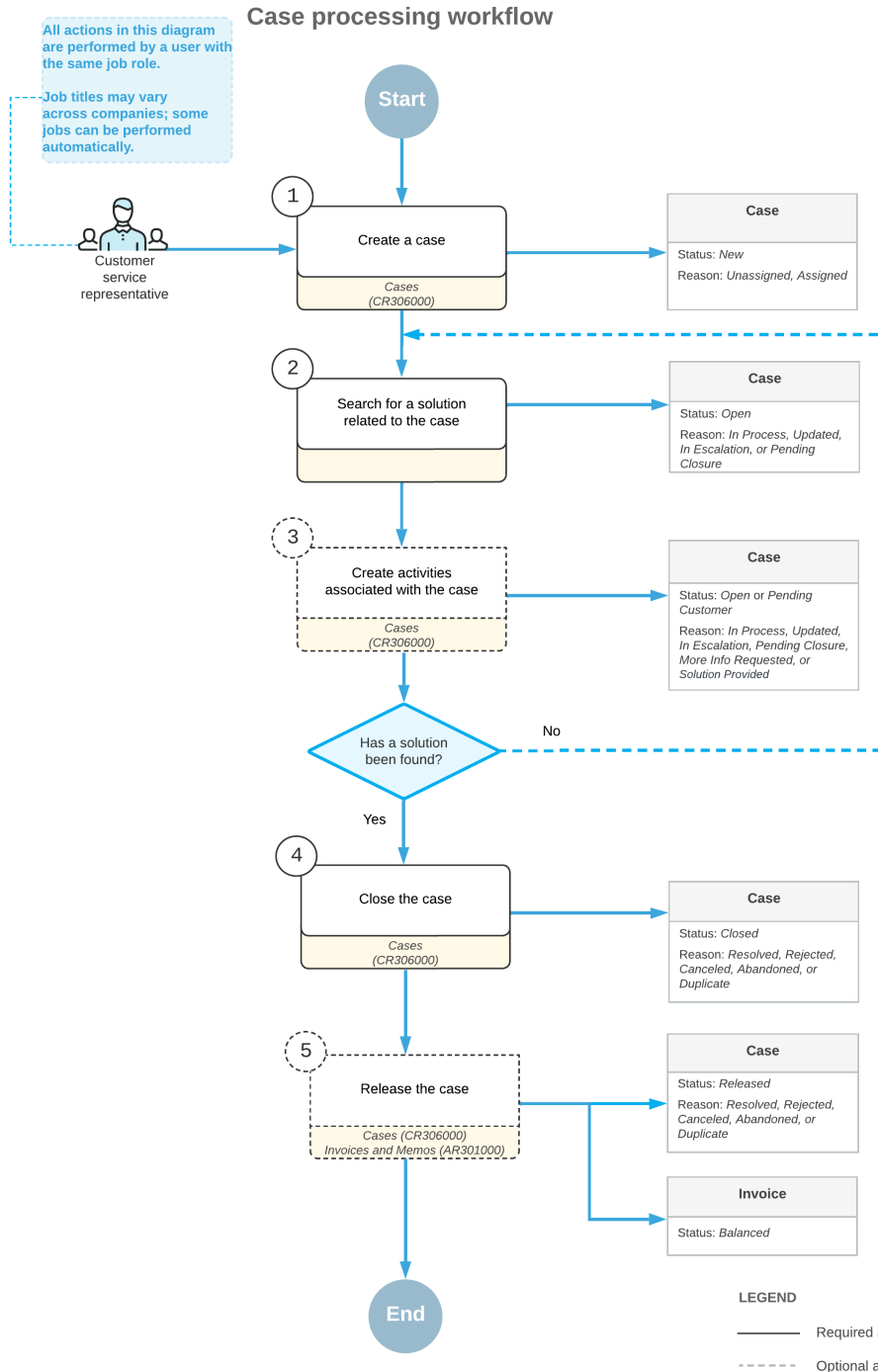
In Acumatica ERP, you can create, process, and close cases. The processing of cases is described further in this topic. You can also associate a case with another case, if needed, as described in [Relationships Between Cases](#).

Depending on your company's customer support processes, users involved in case management can manage a case by performing the following steps:

1. Creating a case in the system: On the [Cases](#) (CR306000) form, the appropriate employee creates a case to record the customer's request or problem. For details, see [Creating Cases](#).
2. Assigning a case to an owner: The case creator or another responsible user assigns the case to an owner. This user can begin work on the case or assign the case to another owner. For details, see [Case Assignment to Owners and Workgroups: General Information](#).
3. Escalating a case to another support level or team (optional): The owner of the case escalates the case if they have explored the problem and concluded that it needs to be transferred to a higher level of support that is better suited to find a solution, or to another team to perform some task for the case (such as processing a customer return or refund).
4. Searching for a solution: This step may involve communication with the customer support team, your company, and the customer, as well as any needed external communication, in order to find the solution for the customer's request or problem.
5. Creating activities associated with the case (optional): In Acumatica ERP, you can track the activities you perform to resolve the case. These activities may include creating emails, making phone calls, or conducting meetings. You can create and track these activities by using the **Activities** tab of the [Cases](#) form. For details, see [Managing Emails and Activities](#). If an associated completed activity contains a solution for a case, you can mark it as a case solution on the form of its creation.
6. Closing the case on the [Cases](#) form.
7. Releasing the case activities, the case, or both the case and the activities, and billing the customer by creating an invoice based on the case or the case activities (optional): Individual cases are billed once they are released on the [Cases](#) form, and cases that are managed according to a contract are billed in batches when it is time to issue an invoice for the contract. For details, see [Case Management: Billable Cases](#).

Workflow of Case Processing

The following diagram illustrates the processing of a case in Acumatica ERP.



Processing of a Case Through Statuses

In Acumatica ERP, as a case is being processed by a customer support team, it progresses through various statuses. The status is displayed in the **Status** box in the Summary area of the **Cases** (CR306000) form. Because the system updates the status of the case during processing, the **Status** box is unavailable for editing. A user can initiate transitions between case statuses by clicking commands on the More menu or on the form toolbar of the **Cases** form. The *expected next command*—the command that is the expected next step in the workflow—is displayed as a button on the form toolbar.

In Acumatica ERP, a case may be assigned one of the following statuses:

- *New*: The case has been created in the system, but no work has been done on it yet. A case with this status can have the *Unassigned* or *Assigned* reason.
- *Open*: The case is being worked on by the support team. A case with this status can have any of the following reasons: *Assigned*, *In Process*, *Updated*, *In Escalation*, or *Pending Closure*. If the case has been reopened by an incoming email, this status can also be assigned to the case along with the *Updated* reason.
- *Pending Customer*: The support team is waiting for feedback or a response from a customer. A case with this status can have any of the following reasons: *More Info Requested*, *Solution Provided*, or *Pending Closure*.
- *Closed*: The customer's problem has been resolved, a solution has been found, or no further work is expected to be done on the case. A case with this status can have any of the following reasons: *Resolved*, *Rejected*, *Canceled*, *Abandoned*, or *Duplicate*.
- *Released*: The AR invoice for the work performed has been generated for the customer on the [Invoices and Memos](#) (AR301000) form. A case with this status can have any of the following reasons: *Resolved*, *Rejected*, *Canceled*, *Abandoned*, or *Duplicate*.

You can analyze case processing and productivity-related metrics for your support team by generating support reports. For details, see [Support Report: General Information](#).

Relationships Between Cases

A case can be associated with other cases. For example, a case might be defined so that it cannot be resolved until another case, known as a "blocker" case, is resolved.



The relations between cases can be specified only for informational purposes, so that your customer support team can track and enforce these relations; these relations are not enforced by the system.

On the **Related Cases** tab of the [Cases](#) (CR306000) form, you can list cases related to the current case, and specify one of the following relation types for each listed case:

- *Blocks*: The current case should not be closed before the listed case, which is a blocker case, has been closed.
- *Depends On*: The listed case depends on the current case.
- *Related*: There is a "peer" relation between the case with this relation and the current case. That is, neither case blocks or depends on the other case, but the two cases are related in some way.
- *Duplicate Of*: The current case is a duplicate of the listed case.

Template-Based Emails Related to Cases

A system administrator can configure Acumatica ERP to automatically send template-based emails related to cases. For example, the administrator might set up the system to send an email to a case owner about the assignment of a new case. For details, see [Business Events: Subscribers](#).

Case Management: Billable Cases

In Acumatica ERP, your customer support team can bill customers for cases by creating and tracking case-related billable emails and activities, such as phone calls, tasks, and any other time spent on the case. You can charge customers for the time that your support team has spent on processing the case, based on the released activities.

In Acumatica ERP, the billing settings of a case are defined by the settings of the billing mode that is specified for the case class on the **Details** tab of the [Case Classes](#) (CR206000) form. If a case is billable, on the **CRM Info** tab of the [Cases](#) (CR306000) form, the system selects the **Billable** check box and makes it unavailable for editing if the **Enable Billable Option Override** check box on the **Details** tab of the [Case Classes](#) form is cleared for the case

class. Activities that are associated with the case can be billable or not billable; this setting should be specified for the case class. For details, see [Defining Case Classes](#).

Cases and case-related activities can be billed in accordance with a specific contract or a default contract associated with the case class if the *Time Management* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Case-Based Billing Settings

For a case of a class that has the *Per Case* billing mode selected in the **Billing Mode** box on the **Details** tab of the [Case Classes](#) (CR206000) form, you can do the following:

- Release the case for billing if the case has the *Closed* status. If any activity related to the case has not been completed yet (and approved, if approval is required), you cannot release the case.
- Release the case for billing on the [Cases](#) (CR306000) form; you can also mass-release cases on the [Release Cases](#) (CR507000) form.
- Manually override the total number of billable hours of the case in the **Billing** section on the **CRM Info** tab of the [Cases](#) form. The total billable time is displayed in the **Billable Time** box. The system automatically calculates the total billable time as the sum of the billable time of all reported activities associated with the case. The total billable time is rounded up to the time interval specified in the **Round Time By** box for the case class of this case on the [Case Classes](#) form. The invoice always includes the total number of billable hours displayed in the **Billable Time** box. If the *Time Management* feature is disabled, manually overriding the number of billable hours is the only way you can report the time spent on a case; the customer will then be billed based on the time that you have specified.
- If the case is associated with a contract, enable case counting by specifying an item in the **Case Count Item** box of the **Summary** tab (**Case Billing Settings** section) of the [Contract Templates](#) (CT202000) form. With case counting, you can bill your customer for only the number of cases associated with the contract. The billable hours reported for the case will also be billed. For details, see [Managing Contracts](#).
- Use direct billing, which means that the customer associated with the case is billed directly without any contract involved. You must clear the **Require Contract** check box on the [Case Classes](#) form to use direct billing for cases of the class.

Activity-Based Billing Settings of a Case

If a case has the *Per Activity* billing mode selected in the **Billing Mode** box on the **Details** tab of the [Case Classes](#) (CR206000) form, the case must be associated with a contract so that related activities can be billed according to the costs defined by this contract.

For a case of the class that has the *Per Activity* billing mode, you can do the following:

- Bill the customer for separate activities when the case is not yet closed. This mode may be useful when the case cannot be closed by the end of the billing period, although you need to bill the customer for the services already rendered.
- Release only the activities associated with the case on the [Release Time Activities](#) (EP507020) form. The case cannot both be marked as billable and be released for billing.

Billable Activities Associated with a Case

In Acumatica ERP, you can bill a customer for an email or an activity that is associated with a case and marked as billable. If there are any tasks or events associated with the case, the activities related to these tasks and events are billed as activities related to the case.

Before you can create a case-related invoice for an activity, make sure that the following tasks have been performed in the system:

- The activity has been marked as billable on the [Activity](#) (CR306010) or [Email Activity](#) (CR306015) form, with the **Track Time and Costs** check box selected and the hours specified in the **Billable Time** box.



When you have specified the time in the **Time Spent** box, the system copies these hours to the **Billable Time** box. You can make this value less, if needed.

- The activity has been completed (that is, it has the *Completed Status*).
- If approval of activities is required, the activity has been approved for billing. For details, see [Employee Time Entry: Time Activities](#).
- The activity has been released.

You can release a completed and approved (if required) activity for billing in one of the following ways:

- By releasing a time card on the [Release Time Cards](#) (EP505010) form if the owner of the activity uses time cards
- By using the [Release Time Activities](#) (EP507020) form
- By releasing the related case if the case is billed within the *Per Case* billing mode

When a contract-related case is released for billing, the contract usage data is updated. You can view the resulting data on the [Contract Usage](#) (CT303000) form. For more information on how contract-related cases are billed, see [Contract Billing: General Information](#).

You use the [Invoices and Memos](#) (AR301000) form to view the invoices that were generated during direct billing.

You can view the data on the resulting customer transactions by using the [Customer History](#) (AR652000) report.

Billable Activities Associated with a Project

If a case activity is associated with a project, a project transaction may be created during direct billing. Alternatively, the same project transaction may be generated during the release of the time card that includes the case activity if the time card is released before the case is billed. For details about time card release, see [Employee Time Entry: Time Cards](#). These project transactions can be used for tracking the project costs. For details about project cost tracking, see [Project Budget: General Information](#).

Case Management: Return Orders

In Acumatica ERP, while you are working with a case, you can create a return order for the customer directly from the case. You can configure the system to monitor the statuses of case-related return orders and generate notifications for users when orders are closed.

Creation of Return Orders

You can create a return order based on a case on the [Cases](#) (CR306000) form by clicking **Create Return Order** on the More menu. In the **Create Return Order** dialog box, which opens, you can specify the type of the order to be created on the [Sales Orders](#) (SO301000) form. In the **Return Order Type** box, only order types with the *RMA Order* automation behavior are available for selection. The automation behavior of an order type is specified in the [Order Types](#) (SO201000) form. By default, the system inserts in this box the order type specified in the **Default Return Order Type** box on the [Sales Orders Preferences](#) (SO101000) form if one has been specified. This box appears on the [Sales Orders Preferences](#) form only if the *Customer Management* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

After you specify the order type and click **Create** in the dialog box, the system checks for the following issues before creating the return order:

- If the **Business Account** box on the [Cases](#) form is empty or contains a business account that has not been extended to be a customer, the system shows an error message indicating that the business account selected in the case must have the *Customer* or *Customer & Vendor* type.
- If you have insufficient access rights to create a return order on the [Sales Orders](#) form, the system shows an error message.
- If the *Customer and Vendor Visibility Restriction* feature is enabled on the [Enable/Disable Features](#) form, the creation of return orders for the customer that is selected in the case might be restricted based on the branch specified for the customer in the **Restrict Visibility To** box (**Financial** tab) of the [Customers](#) (AR303000) form. If this branch is different than your current branch, the system shows an error message indicating that in the user's current branch, the creation of a return order for this customer is restricted.

If no error is generated, the system opens the [Sales Orders](#) form for the creation of a new return order. The system inserts values into the boxes in the Summary area of the form as follows:

- **Order Type:** The system inserts the order type that was specified in the **Create Return Order** dialog box. If you change the order type in the return order, the other predefined values will be removed, and the relation between the return order and the case will be lost.
- **Customer:** The system inserts the customer that was specified in the **Business Account** box of the [Cases](#) form for the case.
- **Location:** The system inserts the location that was specified in the **Location** box in the Summary area of the [Cases](#) form for the case. If no location is specified in this box, the system inserts the *MAIN* location of the customer by default.
This box appears on the form only if the *Business Account Locations* feature is enabled on the [Enable/Disable Features](#) form.
- **Contact:** The system copies the contact that was specified in the **Contact** box of the [Cases](#) form. If this box is empty for the case, the system leaves the box empty for the return order.
- **Description:** The system inserts the text that was entered into the **Subject** box of the [Cases](#) form.

The system also creates a new relation between the case and the return order. That is, on the **Relations** tab of the [Cases](#) form, the system adds a record for the sales order with the *Derivative* role and the *Sales Order* type. On the **Relations** tab of the [Sales Orders](#) form, the system adds a record for the case with the *Source* role and the *Case* type.

You can view the list of case-related return orders on the Return Orders (CR306017) predefined generic inquiry form. The associated generic inquiry has the *CR-Return Orders* inquiry title specified on the [Generic Inquiry](#) (SM208000) form.

Notifications About the Closure of Case-Related Return Orders

You can monitor the closure of case-related return orders by using the following predefined business events on the [Business Events](#) (SM302050) form:

- *Return Order - Note:* This business event causes the generation of a note notification.
- *Return Order - Email:* This business event causes the generation of an email notification.



By default, the business events are inactive; a system administrator can activate them. The administrator can also modify these events to meet the company's business needs.

These business events cause the system to generate notifications if the following conditions are met:

- The status of a case-related return order has been changed to *Completed*.
- The related case is active. That is, its status is *New*, *Open*, or *Pending Customer*.

The type of notification depends on whether an owner has been assigned to a related case, as described below:

- If the case has no owner, the system generates a note notification. That is, it creates an activity of the *Note* type on the [Activity](#) (CR306010) form and adds a row with a link to this activity on the **Activities** tab of the [Cases](#) (CR306000) form.
- If the case has an owner, the system generates both a note notification (as described above) and an email notification. The system generates an email notification by creating an activity of the *Email* type on the [Email Activity](#) (CR306015) form. The system sends the email to the owner of the case; it also adds a row with a link to this activity on the **Activities** tab of the [Cases](#) form.

If multiple return orders are related to a particular case, the system generates the appropriate notifications for each return order.

Case Management: To Process a Non-Billable Case

The following activity demonstrates how to process a non-billable case in Acumatica ERP.

Story

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

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.
 - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the [Case Classes](#) (CR206000) form, the *PRESALE* case class, which defines presales requests from potential clients and customers, has been created.
- On the [Cases](#) (CR306000) form, a case has been created that has *Request for compatibility of accessories* in the **Subject** column.
- On the [Contacts](#) (CR302000) form, the *Chuck Hester* contact has been created.

Process Overview

In this activity, you will do the following:

1. Open the case on the [Cases](#) (CR306000) form.
2. Create an email on the [Email Activity](#) (CR306015) form to reply to the customer's request.
3. Close the case on the [Cases](#) (CR306000) form.

System Preparation

Before you start working on the case, you should do the following:

1. Sign in to the system as technician Jeffrey Vega by using the following credentials:

- **Username:** *vega*
 - **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 1: Opening the Case

To open the case for the request from the *Chuck Hester* contact, do the following:

1. Open the *Request for compatibility of accessories* case on the [Cases](#) (CR306000) form.
2. On the form toolbar, click **Take Case**. Notice that in the **Owner** box, the system has inserted *Jeffrey Vega*.
3. Click **Open**.
4. In the **Open** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

You have opened the case. Notice that in the Summary area of the [Cases](#) form, the system has inserted *Open* in the **Status** box and *In Process* in the **Reason** box.

Step 2: Creating the Case-Related Email

Suppose that you have verified that the feeder kit and the peel ejector kit are compatible with the *JUICER10C* model.

To send an email to Chuck Hester communicating this information, do the following:

1. While you are still viewing the case on the [Cases](#) (CR306000) form, on the More menu, under **Activities**, click **Create Email**. The [Email Activity](#) (CR306015) form opens in a pop-up window. Notice that in the **To** box, the system has inserted the contact's name, *Chuck Hester*, and in the **Subject** box, the system has inserted the ID and the subject of the case.
2. In the **From** box, select the *support@sweetlife.example.com*.
3. On the **Message** tab, type the text of the email body. As an example, you can type the following message:
Dear Chuck,

I am happy to confirm that the feeder kit and the peel ejector kit are compatible with the JUICER10C. You can easily use them with the juicer at your convenience.
4. On the **Details** tab, select the **Internal** check box to hide the email from the Self-Service Portal users.
5. On the form toolbar, click **Save**.
6. Click **Send**. The system closes the [Email Activity](#) form and returns you to the [Cases](#) form. Notice that a row with the *Email* type is added to the table on the **Activities** tab of the [Cases](#) form.

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.

Step 3: Closing the Case

To close the *Request for compatibility of accessories* case, do the following:

1. While you are still viewing the case on the [Cases](#) (CR306000) form, on the form toolbar, click **Close**.

2. In the **Close** dialog box, which opens, do the following:
 - a. In the **Reason** box, select *Resolved*.
 - b. Click **OK**. The system closes the dialog box and returns you to the form.

You have closed the case. Notice that in the Summary area of the **Cases** form (**Document** tab), the system has inserted *Closed* in the **Status** box and *Resolved* in the **Reason** box, as shown in the following screenshot.

The screenshot shows the Acumatica Cases form in the Document tab. The case is titled "000009 - Request for compatibility of accessories". The Status is "Closed" and the Reason is "Resolved". The Subject is "Request for compatibility of accessories". The form also displays fields for Business Account, Location, Contact, Owner, Reported On, Severity, Priority, and Closed On. The Status and Reason fields are highlighted with red boxes.

Figure: The closed non-billable case

Case Management: To Process a Billable Case

The following activity demonstrates how to process a billable case that has the *Per Case* billing mode in Acumatica ERP.

Story

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

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.
 - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the [Case Classes](#) (CR206000) form, the *JREPAIR* case class, which defines cases related to the repair and maintenance of juicers, has been created. The *Per Case* billing mode has been specified for this case class.
- On the [Cases](#) (CR306000) form, a case has been created that has the *Request for juicer repair from Storehut* in the **Subject** column.
- On the [Business Accounts](#) (CR303000) form, the *STOREHUT* business account record has been created and extended as a customer, with its settings specified on the [Customers](#) (AR303000) form.

Process Overview

In this activity, you will do the following:

1. Open the case on the [Cases](#) (CR306000) form.
2. Create a billable email on the [Email Activity](#) (CR306015) form to record the results of the repair and inform the customer about fixing the juicer.
3. Create a billable activity of the *Work Item* type on the [Activity](#) (CR306010) form to record the results of delivering the repaired juicer to the client.
4. Close the case on the [Cases](#) form.
5. Release the case for billing on the [Cases](#) form, which causes the system to generate an AR invoice on the [Invoices and Memos](#) (AR301000) form.
6. View the AR invoice on the [Invoices and Memos](#) form.

System Preparation

Before you start working on the billable case, 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 the business date in your system is set to 1/30/2025. If a different date is displayed, click the Business Date menu button in the top pane of the Acumatica ERP screen, and select 1/30/2025 in the calendar.

Step 1: Opening the Case

To open the case for the request from the *STOREHUT* customer, do the following:

1. Open the *Request for juicer repair from Storehut* case on the [Cases](#) (CR306000) form.
2. On the form toolbar, click **Open**.
3. In the **Open** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

You have opened the case. Notice that in the Summary area of the [Cases](#) form, the system has inserted *Open* in the **Status** box and *In Process* in the **Reason** box.

Step 2: Creating a Billable Email Associated with the Case

Suppose that you have fixed the juicer and need to record the billable time for the repair in the system and inform the customer about the result of the repair and the time for the delivery of the juicer. For simplicity, you will create one email for these purposes.

To create a billable email associated with the case, do the following:

1. While you still viewing the case with the *Request for juicer repair from Storehut* subject on the [Cases](#) (CR306000) form, on the More menu, under **Activities**, click **Create Email**.

The [Email Activity](#) (CR306015) form opens in a pop-up window. Notice that in the **To** box, the system has inserted the contact's name, *Tonya Lawrence*, and in the **Subject** box, the system has inserted the ID and the subject of the case.

2. In the **From** box, select *support@sweetlife.example.com*.
3. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

Dear Tonya,

The juicer JUICER15 has been repaired.

The delivery is scheduled for tomorrow between 2 PM and 4 PM. Please confirm that the time range is suitable.

4. On the **Details** tab, do the following:
 - a. Select the **Track Time and Costs** check box. This causes the system to display additional UI elements on the tab.
 - b. Make sure that the **Billable** check box is selected.
 - c. Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that you have performed the repair during your working hours.
 - d. In the **Time Spent** box, select *02:30*, which means that it took you two and a half hours to repair the juicer. Notice that in the **Billable Time** box, the system has inserted the time that you have specified in the **Time Spent** box.
 - e. In the **Project** box, select *X—Non-Project Code*.
5. On the form toolbar, click **Save**.
6. Click **Send**. The system closes the *Email Activity* (CR306015) form and returns you to the *Cases* form. Notice that a row with the *Email* type has been added to the table on the **Activities** tab of the *Cases* form for the case.

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.

7. On the **Activities** tab, in the **Summary** box, click the link to open the email.
8. On the **Details** tab, in the **Status** box, select *Completed*.



For simplicity, in this activity, you have changed the status of the email before receiving the confirmation from the customer. (In actual case processing, you would change the status after receiving the confirmation.) You can release a case (which you will do later in this activity) if all the activities associated with the case have the *Completed* status.

9. On the form toolbar, click **Save**.
10. Close the form. The system returns you to the *Cases* form with the case open.

Step 3: Creating a Billable Activity of the Work Item Type Associated with the Case

Suppose that your customer has confirmed the delivery of the juicer that you have repaired and you need to record the time for the delivery in the system.

To create a billable activity of the *Work Item* type, do the following:

1. While you are still viewing the case with the *Request for juicer repair from Storehut* subject on the *Cases* (CR306000) form, on the table toolbar of the **Activities** tab, click **Create Activity > Create Work Item**. The *Activity* (CR306010) form opens in a pop-up window.
2. In the **Summary** box, type a brief description of the activity: *Delivery of a juicer to Storehut*.
3. Make sure that the **Internal** check box is selected to hide the activity from the Self-Service Portal users.
4. In the **Start Date** box, specify the current date.

5. In the text area, type your comments or any other information related to the delivery, such as *The courier Tim Fincher will deliver the juicer.*
6. Select the **Track Time and Costs** check box. This causes the system to display additional UI elements in the Summary area.
7. In the **Status** box, select *Completed*.
8. Make sure that the **Billable** check box is selected.
9. Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that the juicer will be delivered during working hours.
10. In the **Time Spent** box, select *01:00*, which means that it will take an hour to deliver the juicer. Notice that in the **Billable Time** box, the system has copied the time that you have specified in the **Time Spent** box.
11. In the **Project** box, select *X—Non-Project Code*.
12. On the form toolbar, click **Save**.
13. Close the form. The system returns you to the [Cases](#) form. Notice that a row with the *Work Item* type has been added to the table on the **Activities** tab of the [Cases](#) form for the case.

Step 4: Closing the Case

To close the case for the *STOREHUT* customer, do the following:

1. While you are still viewing the *Request for juicer repair from Storehut* case on the [Cases](#) (CR306000) form, on the form toolbar, click **Close**.
2. In the **Close** dialog box, which opens, do the following:
 - a. In the **Reason** box, select *Resolved*.
 - b. Click **OK**. The system closes the dialog box and returns you to the form.

You have closed the case. Now you can bill your customer for the repair of the juicer by releasing the case, which causes the system to create an invoice. Notice that in the Summary area of the [Cases](#) form, the system has inserted *Closed* in the **Status** box and *Resolved* in the **Reason** box.

Step 5: Releasing the Case

To release the *Request for juicer repair from Storehut* case, do the following:

1. While you are still viewing the case on the [Cases](#) (CR306000) form, open the **Activities** tab.
2. On the table toolbar, click **Refresh** to make sure that all the activities are displayed.



You need to refresh the data in the table if any automatic email notification related to case closure has been configured in the system and the corresponding notification template has been defined to save emails as activities on the **Activities** tab of the form. You may need to wait for a few moments until the system creates an email and lists this email on the **Activities** tab.

3. In the **Status** column, make sure that all the rows have the *Completed* option.



You can release a case if all the activities associated with the case have the *Completed* status.

4. On the table toolbar, click **Release**.

It may take some time for the system to release the case. When the case has been released, you will see a notification with a green vertical bar and a message indicating successful processing. In the **Status** box

of the Summary area, the system changes the status of the case to *Released*. On the [Invoices and Memos](#) (AR301000) form, the system creates an invoice associated with the case.

Step 6: Viewing the Case-Based Invoice

To view the invoice associated with the *Request for juicer repair from Storehut* case, do the following:

1. While you are still viewing the case on the [Cases](#) (CR306000) form, on the More menu, under **Other**, click **View Invoice**.
2. On the **Details** tab of the [Invoices and Memos](#) (AR301000) form, which opens, notice one detail row with the following settings of the invoice (see the following screenshot):
 - **Inventory ID:** The *TECHNICIAN* labor item
 - **Unit Price:** The rate for the works performed
 - **UOM:** HOUR
 - **Quantity:** The number of hours that were spent to resolve the case

The screenshot displays the 'Invoices and Memos' form for 'Invoice 000117 - Storehut'. The 'DETAILS' tab is active, showing various fields for the invoice, including Type (Invoice), Reference Nbr (000117), Status (Balanced), Date (1/30/2025), Post Period (01-2025), Customer (STOREHUT - Storehut), Location (MAIN - Primary Location), Terms (30D - 30 Days), Due Date (3/1/2025), Cash Discount (3/1/2025), Project (X - Non-Project Code), and Description (Request for juicer repair from Storehut). A summary table on the right shows totals: Detail Total (157.50), Line Discounts (0.00), Document Dis... (0.00), Retained Amo... (0.00), Tax Total (0.00), Balance (157.50), and Cash Discount (0.00). Below the summary, a table lists the invoice details:

Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Amount	Account
TECHNICIAN	Request for juicer repair from Storehut	3.50	HOUR	45.0000	157.50	0.000000	0.00	157.50	40000

Figure: The case-based invoice

Case Management: To Create a Return Order from a Case

The following activity will walk you through the process of creating a return order from a case in Acumatica ERP.



This activity is based on the *U100* dataset. If you are using another dataset, or if any system settings have been changed in *U100*, these changes can affect the workflow of the activity and the results of the processing. To avoid any issues, restore the *U100* dataset to its initial state.

Story

Suppose that the FourStar Coffee & Sweets Shop recently purchased a commercial juicer but has decided to return it. Andrea Weaver, the assistant manager at FourStar Coffee & Sweets Shop, has called to initiate the return. As the delivery manager of the SweetLife Fruits & Jams company, you have discussed the return with Andrea. Now you need to create a return order, which you will do directly from the [Cases](#) (CR306000) form.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- 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.
 - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the [Case Classes](#) (CR206000) form, the *SUPPORT* case class, which defines support requests from customers, has been created.
- On the [Business Accounts](#) (CR303000) form, the *COFFEESHOP* business account record has been created and extended as a customer, with its settings specified on the [Customers](#) (AR303000) form.
- On the [Contacts](#) (CR302000) form, the *Andrea A. Weaver* contact has been created and specified as the primary contact for the *COFFEESHOP* business account.
- On the [Sales Orders Preferences](#) (SO101000) form, the *RM* order type has been specified in the **Default Return Order Types** box.

Process Overview

In this activity, you will first enter a case on the [Cases](#) (CR306000) form. From this form, you will create a return order. You will then save the return order on the [Sales Orders](#) (SO301000) form.

System Preparation

Before you start working on the case, you should do the following:

1. Sign in to the system as delivery manager Marcos Garcia by using the following credentials:
 - **Username:** *garcia*
 - **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 a Return Order from a Case

To create a case and then a return order for the request submitted by Andrea Weaver of *COFFEESHOP*, do the following:

1. On the [Cases](#) (CR306000) form, add a new record.
2. In the Summary area, do the following:
 - a. In the **Case Class** box, select *SUPPORT*.
 - b. In the **Business Account** box, select *COFFEESHOP*.
 - c. In the **Contact** box, make sure that *Andrea A. Weaver* is selected as the primary contact for the *COFFEESHOP* business account.
 - d. In the **Subject** box, type *Return of juicer15C*.
3. On the form toolbar, click **Save**.
4. On the More menu, click **Create Return Order**. The **Create Return Order** dialog box opens.
5. Select *RM* in the **Return Order Type** box, and click **Create**.

The system creates a return order and opens it on the [Sales Orders](#) (SO301000) form.

6. On the [Sales Orders](#) form, notice that the system has inserted the *RM* type for the return order and populated the corresponding boxes with the settings specified in the case.
7. On the **Details** tab, click **Add Row** on the table toolbar, and do the following:
 - In the **Inventory ID** column, select *JUICER15C*.
 - In the **Warehouse** column, select *WHOLESALE*.
 - In the **Quantity** column, type 1.
8. On the form toolbar, click **Save**.

Lesson 6: Submitting Cases to Internal Teams

In this lesson, you will learn how to create and manage internal cases.

Case Submittal to Internal Teams: General Information

You can use internal cases (also referred to as *internal support cases* or *internal tickets*) to submit a requests, questions, problems, or other inquiry. Acumatica ERP gives you the ability to easily create and submit cases to an employee of an internal team.

This topic provides information about creating cases in Acumatica ERP and submitting them to internal teams in your company.

Learning Objectives

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

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

Applicable Scenarios

You may want to learn how to submit cases to internal teams in Acumatica ERP in scenarios that include the following:

- You are requesting that the member of the internal team perform a task for you or help you perform a task. For example, you might need a member of the legal team to draw up a contract, or an IT support engineer to configure a new element in Acumatica ERP.
- You have a question for a member of the internal team. For example, you might be asking an IT employee whether an email you have received is suspicious or legitimate. As another example, you might be asking the internal human resources team about the employee review process.
- You have a problem that is preventing productive work for you or your colleagues. For example, your employee's paychecks may not reflect her new salary and you need to report the issue to the internal payroll team. Or you may need an IT support engineer to help you access a system to which you have been denied access.

Submittal of a Case to an Internal Team

In Acumatica ERP, you can submit a case to an internal team member in your company by selecting a case contact who is an employee of your company.

This ability depends on a setting in the case class selected for an internal case. On the [Case Classes](#) (CR206000) form, a system administrator creates at least one case class for internal cases that are submitted by employees to company teams. On the **Details** tab of the [Case Classes](#) form, for each case class, the system administrator selects the **Allow Selecting Employee as Case Contact** check box.

When you create an internal case on the [Cases](#) (CR306000) form, in the **Case Class** box of the Summary area, you specify a case class that allows the selection of employees. Then you can select an employee of your company in the **Contact** box. When you select this employee, the employee's company name is inserted in the **Business Account** box. The employee can also be a subcontractor with a related company or if your organization consists of multiple related companies. If the company has multiple branches, the name of the branch is inserted instead of the company name.

Creation of Cases to Internal Teams in Acumatica ERP

In Acumatica ERP, an internal case is a record created and viewed on the [Cases](#) (CR306000) form that represents a new, open, or closed request from an employee and has a variety of settings.

You can create an internal case in any of the following places:

- On the [Cases](#) (CR306000) form of Acumatica ERP
- On the New Support Case (SP203000) form of the Acumatica Self-Service Portal
- On the Cases screen of the Acumatica mobile app
- Through the Acumatica add-in for Outlook

When you are creating an internal case, you can enter, view, and modify (if applicable) the following case settings on the [Cases](#) form:

- In the Summary area, basic settings, such as the case's ID, date reported, case class, contact, owner, status, reason, subject, and priority. You can also specify the severity of the case, which may also relate to a time requirement; the reaction time (which determines the service level agreement) corresponding to each severity level is defined by the case class. (For details, see [Case Classes: Case Commitments](#).)
- On the **Details** tab, the description of the case.
- On the **Attributes** tab, the list of attributes, if they have been defined for the case class on the [Case Classes](#) form. Attributes may be used to help your company manage specific information that is useful for its business.
- On the **Activities** tab, emails, tasks, events, and activities associated with the case. You can use this tab for viewing the activities that a person to whom the case is assigned performs.

Case Submittal to Internal Teams: Process Activity

The following activity demonstrates how to manually create a case and submit the case to a member of your company's internal IT team.

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You want to track information in opportunities about the customer's company size and its number of employees. You need to submit

an internal case to system administrator Kimberly Gibbs. In the case, you will ask Kimberly to add two custom UI elements on the [Opportunities](#) (CR304000) form.

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.
 - *Case Management* in the *Customer Management* group of features: This feature gives users the ability to create support cases, assign cases to owners, and process cases.
- On the [Case Classes](#) (CR206000) form, the *ITHELP* case class has been created for the internal cases that employees submit to the SweetLife's IT team. On the **Details** tab, the **Allow Selecting Employee as Case Contact** check box is selected.

Process Overview

In this activity, you will do the following on the [Cases](#) (CR306000) form:

1. Create an internal case.
2. Submit the case to a SweetLife employee on the IT team.

System Preparation

Before you start creating an internal case and submitting it, you should do the following:

1. Sign in to the system as sales manager David Chubb by using the following credentials:
 - **Username:** *chubb*
 - **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: Submitting an Internal Case to IT

To create an internal case and submit the case to Kimberly Gibbs, the needed IT employee, do the following:

1. On the [Cases](#) (CR306000) form, add a new record.
2. In the Summary area of the **Document** tab, do the following:
 - a. In the **Case Class** box, select *ITHELP*.
 - b. In the **Contact** box, select *Kimberly Gibbs*.
 Notice that in the **Business Account** box, *HEADOFFICE* has been inserted. It is the identifier of the *SweetLife Head Office and Wholesale Center* branch, to which the *Kimberly Gibbs* employee belongs.
 - c. In the **Subject** box, type *Ability to specify a customer's company size and the number of employees on the Opportunities form*.
 - d. In the **Priority** box, select **Medium**.
3. On the **Details** tab of the form, in the text area, type *Kimberly, please add two boxes to the Opportunities form: Company Size and Number of Employees*.
4. On the form toolbar, click **Save**.

You have created the internal case and submitted it to the IT employee.