End-User Course

CRM

Sales Operations
2025 R1

Revision: 4/7/2025

Acumatica
The Cloud ERP

Contents

Copyright

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How to Use This Course

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

What Is in This Guide

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

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

Which Training Environment You Should Use

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

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

What Is in a Process Lesson

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

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

What the Documentation Resources Are

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

How to Create a Tenant with the U100 Dataset

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

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

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

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

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

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

Which Credentials You Should Use

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

1. Lesson 1.1: activity 1: *chubb*
2. Lesson 1.1: activity 2: *owen*
3. Lesson 1.2: *chubb*
4. Lesson 1.3: *chubb*
5. Lesson 1.4: activity 1–2: *owen*
6. Lesson 1.4: activity 3: *chubb*
7. Lesson 2.1: *chubb*
8. Lesson 2.2: *chubb*
9. Lesson 2.3: *chubb* and *vega*
10. Lesson 2.4: *chubb*
11. Lesson 2.5: *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.

Lesson 1: Qualifying Sales Leads

In this lesson, you will learn about lead qualification as performed by sales teams. The general process of lead qualification by marketing and sales teams is described in *Lead Qualification by Sales Teams: General Information* (see the *Lead Qualification Process* and *Lead Qualification Workflow* sections).

Lesson 1.1: Qualifying Leads by Sales Teams

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

Lead Qualification by Sales Teams: General Information

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

Learning Objectives

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

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

Applicable Scenarios

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

- You have obtained a lead from marketing: The marketing team has qualified a lead as a marketing-qualified lead (MQL), and your manager has assigned the lead to you. You need to get in touch with the lead and find out (qualify) if the organization is interested in the product. If so, you need to convert the lead to an opportunity.
- A lead has contacted you and confirmed the intention to buy the company's products or services, and you need to convert the lead to an opportunity.
- A lead has expressed that its organization is not interested in your company's products or services, and you need to disqualify the lead.
- You need to return a lead that is not yet ready to buy to a marketing team for further nurturing.

Lead Qualification as Performed by Sales in Acumatica ERP

When a sales team starts working with a marketing-qualified lead (MQL), the lead qualifier (for example, a telemarketer or a sales representative) can contact and qualify the lead, and then record the results in the system. If a lead is not yet ready to buy, a sales manager can return the lead to the marketing team for further nurturing. If the lead confirms interest in the company's products or services, the lead qualifier qualifies the lead as sales-accepted (SAL) and the sales team can take further follow-up actions on the lead, such as converting the lead to an opportunity and creating a contact and a business account for the lead in the system. A lead converted to an opportunity becomes a sales-qualified lead (SQL).

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

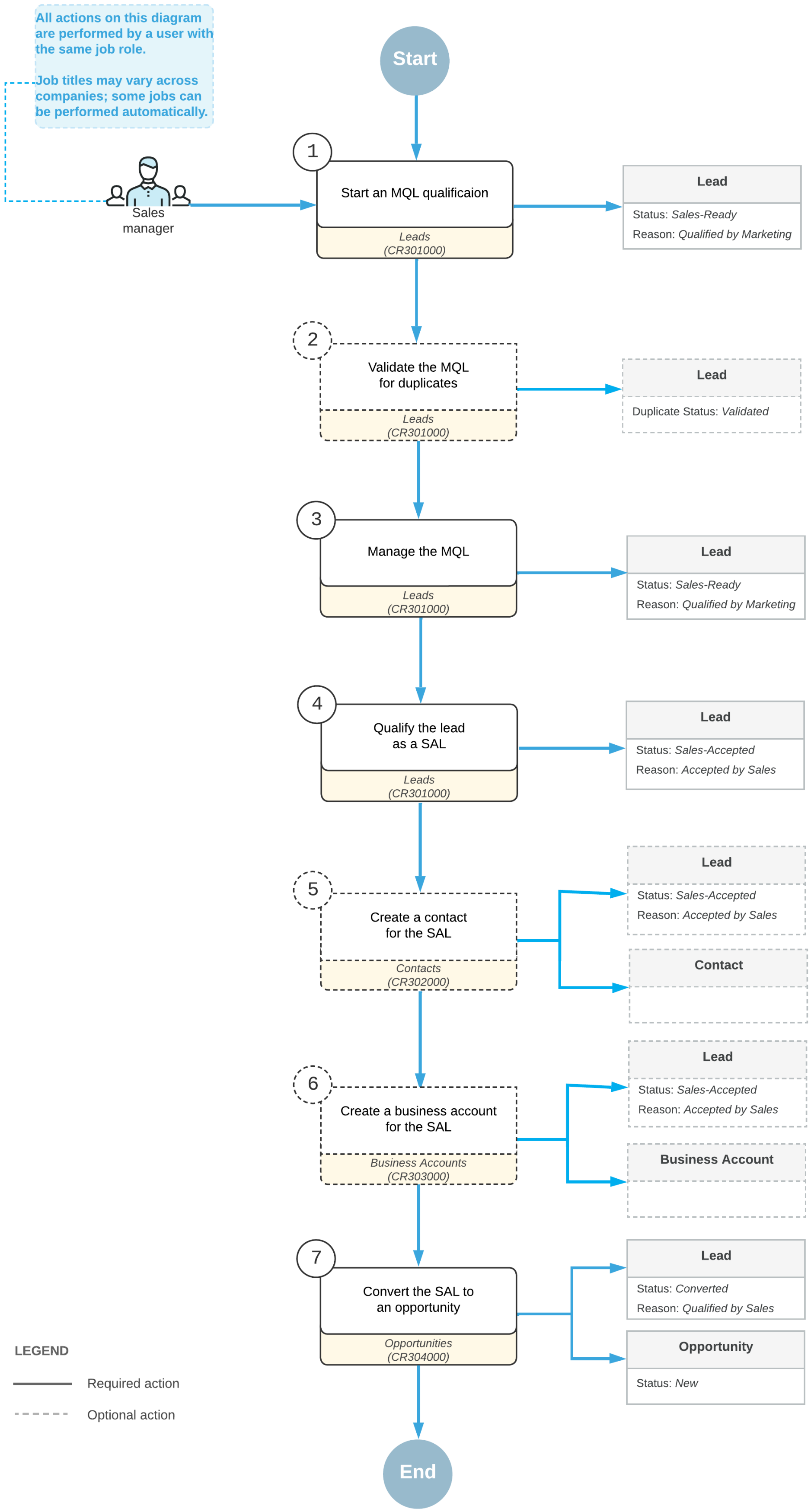
- Validating the lead for duplicates, as described in *Validating Records for Duplicates*.
- Assigning the lead to an owner, as described in *Assigning Leads to Owners and Workgroups*.
- Communicating with the lead, as described in *Managing Emails and Activities* and *Managing Mass Emails*.
- Accepting the lead for follow-up actions by clicking **Accept** for the lead on the More menu of the *Leads* (CR301000) form.
- Creating a contact for the lead, as described in *Creating Contacts*.
- Creating a business account for the lead, as described in *Creating Business Accounts*.
- Converting the lead to an opportunity by clicking **Convert to Opportunity** for the lead on the More menu of the *Leads* form. During this process, you specify basic settings for the opportunity, which will be created on the *Opportunities* (CR304000) form, and create a contact and a business account for the lead if they have not yet been created. Creation of a business account may be required or optional depending on the setting on the *Lead Classes* (CR207000) form: If the **Require Account for Conversion to Opportunity** check box (**Conversion Settings** section of the **Details** tab) is cleared, the creation of a business account will be skipped when the lead is converted to an opportunity.
- Returning the lead to the marketing team for further nurturing by clicking **Open** for the lead on the More menu of the *Leads* form.
- Disqualifying a lead by clicking **Disqualify** for the lead on the More menu of the *Leads* form.
- Reopening a lead that has been disqualified by clicking **Open** for the lead on the More menu of the *Leads* form.

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

Lead Qualification Workflow (Sales)

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

Lead qualification workflow (sales)



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

The following activity demonstrates how to convert a lead to an opportunity in Acumatica ERP.

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have obtained a lead from the marketing team, which has qualified the lead and your manager has assigned the lead to you. Christina Taylor, a manager at SweetTooth Cafe, visited the company's official website, chose a pro series juicer made by Squeezo Inc., and would like to buy the juicer. You need to get in touch with the lead and find out if Christina is interested in the product. If so, you need to convert the lead to an opportunity.

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled.
- On the *Lead Classes* (CR207000) form, the *CAFE* lead class, which defines SweetLife's leads that represent employees from cafes and restaurants, has been created.
- On the *Contact Classes* (CR205000) form, the *CAFE* contact class has been created.
- On the *Business Account Classes* (CR208000) form, the *CAFE* business account class has been created.
- On the *Opportunity Classes* (CR209000) form, the *PRODUCT* opportunity class has been created.
- On the *Leads* (CR301000) form, the *Christina Taylor* lead has been created.

Process Overview

In this activity, you will convert a lead to an opportunity on the *Leads* (CR301000) form.

System Preparation

Before you start converting the lead to an opportunity, 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: Converting a Lead to an Opportunity

To convert the *Christina Taylor* lead to an opportunity, do the following:

1. Open the *Christina Taylor* lead record on the *Leads* (CR301000) form.
2. On the More menu, under **Processing**, click **Convert to Opportunity**.
3. In the **Create Opportunity** dialog box, which opens, do the following:
   a. In the **Subject** box of the **Opportunity** section, specify `Sale of JUICER10`.
   b. In the **Opportunity Class** box, select *PRODUCT*.
   c. In the **Business Account ID** box of the **Business Account** section, specify `SWEETTOOTH`.

> If for a lead class on the *Lead Classes* (CR207000) form (**Conversion Settings** section of the **Details** tab) the **Require Account for Conversion to Opportunity** check box is cleared, a business account is not required in order to convert a lead to an opportunity. In this case, the dialog box does not contain the **Business Account** section.

d. In the **Business Account Class** box, select *CAFE*.

e. In the **Contact** section of the **Main** tab, notice that the system has inserted contact settings specified in the **Contact** section of the **Contact Info** tab of the *Leads* form.

> You can change the settings of the contact or add any missing settings, if needed.

f. At the bottom of the dialog box, click **Create**.

The system closes the dialog box, converts the lead to an opportunity that is created on the *Opportunities* (CR304000) form, creates a contact and a business account for the lead, and returns you to the *Leads* form. On the form, notice that the status of the lead is *Converted* and that values have been inserted in the **Contact** and **Business Account** boxes of the Summary area. Also notice that most of the settings in the Summary area and on the **Contact Info**, **CRM Info**, **Attributes**, **Campaigns**, and **Opportunities** tabs have become unavailable for editing.

> If you click **Create & Review** instead of **Create** in the **Create Opportunity** dialog box, the system closes the dialog box, converts the lead to an opportunity, creates a contact and a business account for the lead (if these did not already exist and their settings have been specified in the dialog box), and opens the *Opportunities* form, on which you can view the settings of the opportunity, make any needed changes, and save the updated opportunity.

4. On the **Relations** tab, in the table, view the summary information of the business account, contact, and opportunity associated with the lead, as shown in the following screenshot. For details, see *Managing Relations*.

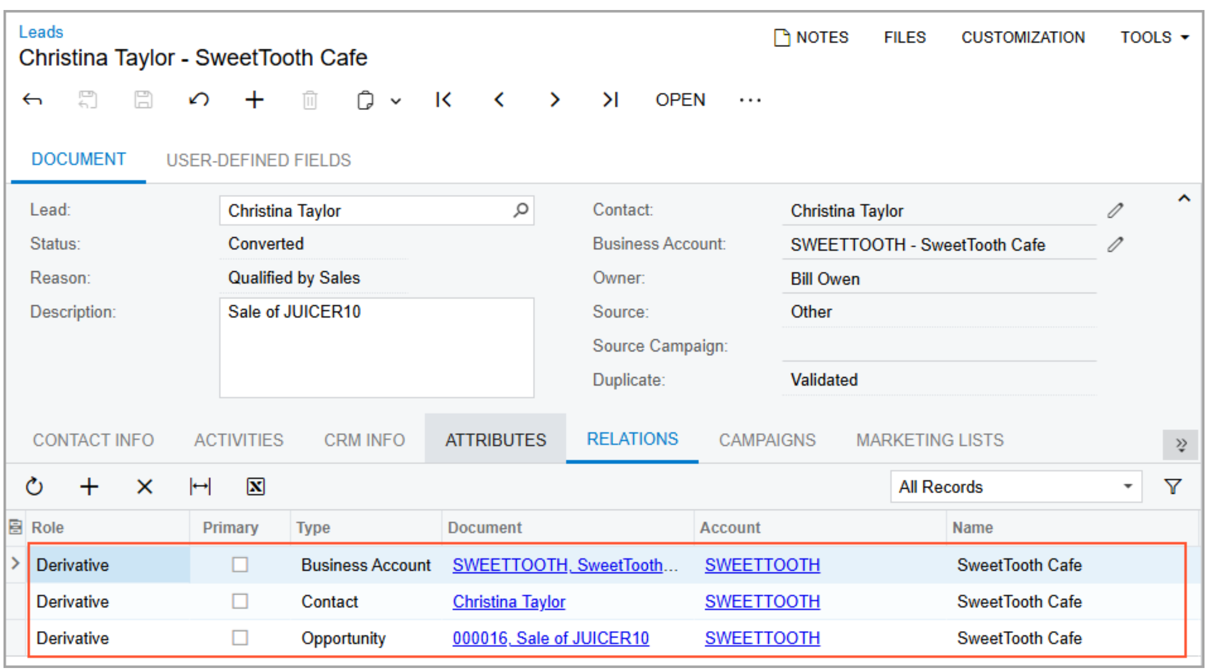


Figure: The business account, contact, and opportunity associated with the lead

You have converted the lead to an opportunity.

Lead Qualification by Sales Teams: To Disqualify a Lead

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

Story

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

Configuration Overview

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

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

Process Overview

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

System Preparation

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

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

Step: Disqualifying a Lead

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

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

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

You have disqualified the lead.

Lesson 1.2: Creating Business Accounts

In this lesson, you will learn how to create and manage business accounts.

Business Accounts: General Information

As you work with prospective customers, you need to create business accounts in the system, which can later be extended as customer accounts. (They can also be extended as vendor accounts if your company purchases some products or services from the company.)

A business account can be used when you create a new entity, such as a contact or lead, that is related to the account. You can associate a newly created contact or lead with an existing business account so that it becomes a representative of this customer or prospect.

This topic provides information about creating business accounts in Acumatica ERP.

Learning Objectives

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

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

Applicable Scenarios

You may want to learn how to create business accounts in scenarios that include the following:

- An employee of your company has contacted a lead and confirmed the contact information and the interest in company's products or services, and you need to convert the lead to an opportunity.
- You have been assigned as the owner of a contact who is employed by a prospective customer interested in your company's products or services, and you need to create a business account.

Business Accounts in Acumatica ERP

In Acumatica ERP, a business account is a record on the *Business Accounts* (CR303000) form that represents a legal entity (a company or an individual) that your company deals with or intends to sell products and services to; it is generally created in the system when your company is marketing its products or services to the business account. This business account can later be extended as a customer (or as a vendor; a business account can be extended as both a customer and a vendor if you sell products or services to this account and buy products or services from it).

A lead and a contact (or multiple leads and contacts) in the system—which are created on the *Leads* (CR301000) form and the *Contacts* (CR302000) form, respectively—may be associated with a business account. To create a business account, you need to specify a contact for this account. If the needed contact has already been created in the system, you can create a business account and associate the contact with the account. If the needed contact has not been created in the system, the system will create it when you are creating the business account. When you are creating a new business account based on a lead, the system automatically copies the contact information from the lead to the business account.

You can delete a business account that has been created based on a lead. In this case, the lead and contact associated with this business account remain in the system.

Creation of Business Accounts in Acumatica ERP

The broader process of creating a business account in Acumatica ERP, which is maintained on the *Business Accounts* (CR303000) form, consists of the following steps:

1. Optional: If you are creating a business account based on an existing lead, validating this lead for duplicates. For details, see *Validating Records for Duplicates*.
2. Creating the business account (from a lead, contact, through lead conversion to an opportunity, or manually).
3. Optional: Creating a contact associated with the business account.
4. Specifying a primary contact for the business account.

You can create a business account in any of the following ways:

- On the *Leads* (CR301000) form when you convert the selected lead to an opportunity by clicking **Convert to Opportunity** on the More menu. In the **Create Opportunity** dialog box, which opens, you specify the opportunity and business account settings; the specification of business account settings may be required or optional, depending on the conversion settings on the *Lead Classes* (CR207000) form for the lead. You then click **Create** or **Create & Review** to create the opportunity and business account. For detailed instructions, see *Lead Qualification by Sales Teams: To Convert a Lead to an Opportunity*.
- On the *Leads* or *Opportunities* (CR304000) form if you are creating a business account associated with the selected lead or opportunity by clicking **Create Account** on the More menu. In the **Create Account** dialog box, which opens, you specify the basic business account and contact settings, and then you click **Create** or **Create & Review** to create the business account.
- On the *Contacts* (CR302000) form if you are creating a business account associated with the contact selected on the form by clicking **Create Account** on the More menu. In the **Create Account** dialog box, which opens, you specify the business account settings and click **Create** or **Create & Review** to create the business account.
- Directly on the *Business Accounts* (CR303000) form. In this case, you add a new record and manually enter the settings of the new business account.
- Directly by using the Acumatica mobile app. For detailed instructions, see *Business Accounts: To Create a Business Account by Using the Acumatica Mobile App*.
- By using import scenarios to import lists of business accounts on the *Import by Scenario* (SM206036) form. You can use the predefined *Import Business Accounts from Excel* import scenario.

Regardless of how you create the business account, you can select a business account class in the **Business Account Class** box on the *Business Accounts* form or in one of the dialog boxes mentioned above, which causes the system to insert default settings for the business account, easing the process of content creation. (For details, see *Defining Business Account Classes*.)

Relations Between a Business Account and Its Associated Records

As you work with a business account in Acumatica ERP, you can track the records associated with the account on the **Relations** tab of the *Business Accounts* (CR303000) form. For details, see *Managing Relations*.

Processing of a Business Account Through Statuses

As a business account is being processed by a marketing or sales team, it progresses through various statuses. The current status of a business account is displayed in the **Customer Status** box in the Summary area of the *Business Accounts* (CR303000) form. You can manually change the status of a business account.

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

- *Prospect*: The business account is a prospective customer that may be interested in signing a deal but has not done this yet.

  This option is available for selection if the business account has the *Business Account* type.
- *Active*: The business account is active, appears in all **Business Account** lookup tables, and can be selected in documents and other records.

  This option is available for selection if the business account has the *Customer* or *Customer & Vendor* type.
- *On Hold*: The business account (and the corresponding customer account, if applicable) is temporarily on hold.

  The business account and the associated customer cannot be selected in documents and other records, and they do not appear in lookup tables for the **Business Account** and **Customer** element.
- *Inactive*: The business account (and the associated customer, if applicable) is inactive. The business account and the associated customer cannot be selected in documents and other records. That is, they do not appear in lookup tables for the **Business Account** and **Customer** element. Any existing document or record with an inactive account or the associated customer cannot be processed; any attempt to modify the document or record results in an error.
- *One-Time*: The business account is for a one-time customer. The account becomes inactive after all the payments have been received.

  This option is available for selection if the business account has the *Customer* or *Customer & Vendor* type.
- *Credit Hold*: The business account has been put on credit hold, which prevents users from creating any new sales orders for the customer: Users cannot select the customer in the **Customer** box in the Summary area of the *Sales Orders* (SO301000) form.

  This option is available for selection if the business account has the *Customer* or *Customer & Vendor* type.

To mass-change the statuses of multiple business accounts or mass-update their settings, you can use the *Update Business Accounts* (CR503320) form.

For details about extending a business account to be a customer or vendor, see *Business Accounts: Extension of a Business Account as a Customer or Vendor*.

Business Accounts: Association with a Contact

Once a business account has been created, you can associate one or multiple contacts with the business account and select a primary contact for it, as described in the following sections.

Creation of Contacts Associated with a Business Account

When you create a business account on the *Leads* (CR301000) or *Contacts* (CR302000) form by specifying the business account and contact settings in the **Create Account** dialog box, the system also creates a contact and associates this contact with the business account. On the *Business Accounts* (CR303000) form, you can view and modify the address details of the contact on the **General** tab and view the contact settings of the contact on the **Contacts** tab. On the **Contacts** tab, you can also create as many contacts associated with the business account as needed.

We recommend that you specify a primary contact associated with the business account, as described in the following section.

Primary Contact for a Business Account

In Acumatica ERP, you can specify a primary contact for a business account. A primary contact is the contact whose contact and address settings the system uses as the default contact for the associated records and documents that have contact settings on them, such as an opportunity created for the business account on the *Opportunities* (CR304000) form, thus ensuring that the contact who officially represents the business is used in these records. A primary contact gives you the following abilities:

- Quickly add to the system the contact information of a business and the official representative of this business
- Easily differentiate between the contact information of the business and the official representative of this business
- View the contact information of both the business and the official representative of this business on the same tab (the **General** tab) of the *Business Accounts* (CR303000) form.

Only one primary contact can be selected for a business account. You can define a primary contact in either of the following ways:

- On the **General** tab of the *Business Accounts* form, you can specify or change the primary contact.
- On the **Contacts** tab of this form, you can select any contact associated with the business account and then clicking the **Set as Primary** button on the table toolbar. This causes the system to select the check box in the **Primary** column for the new primary contact and to populate the UI elements in the **Primary Contact** section of the **General** tab with the settings of the new primary contact.

For an existing contact on the *Contacts* (CR302000) form that is a primary contact of a business account, if you clear the value in the **Business Account** box, the system displays a warning about the possibility of changing the primary contact for the account. If you proceed with clearing the **Business Account** box for the contact—thus deleting the link between the contact and the business account—on the **General** and **Contacts** tabs of the *Business Accounts* form, the system clears all settings related to the primary contact.

Business Accounts: Extension of a Business Account as a Customer or Vendor

The organizations to which your company intends to sell products and services can initially be defined in Acumatica ERP as business accounts on the *Business Accounts* (CR303000) form. These prospective customers may later become—that is, be *extended* as—customers, vendors, or both. The type of the business account is displayed in the **Type** box on the **CRM Info** tab of the form and can be one of the following: *Business Account*, *Customer*, *Vendor*, or *Customer & Vendor*.

A customer or vendor can be created in the system directly without first being defined as a business account. In this case, the system automatically creates a business account corresponding to the customer or vendor.

A Business Account Extended as a Customer

You extend a business account to be a customer account by clicking **Extend as Customer** on the form toolbar or More menu of the *Business Accounts* (CR303000) form. The system opens the *Customers* (AR303000) form for the new customer with the appropriate settings copied from the business account. On the form, you specify the customer class, the financial settings, and additional settings (such as billing address) that may be used in Acumatica ERP documents of the customer.

When the customer class is specified, the system populates the customer's currency settings (that is, the value in the **Currency ID** box and the state of the **Enable Currency Override** check box on the *Customers* form) with the currency settings specified on the *Customer Classes* (AR201000) form for this customer class. If the customer's currency settings differ from those of the corresponding business account, the system will copy the customer's currency settings to the business account when you save the customer for the first time.

The system synchronizes the currency settings of the business account and the customer. If the currency settings for the customer are changed, the same changes are applied to the corresponding business account. Similarly, changing the currency settings for the business account affects the corresponding customer.

> If you change the business account class of a business account that has already been extended as a customer, the currency settings of both the business account and the corresponding customer will remain unchanged.

When you save the customer, the system changes the type of the business account, shown in the **Type** box (**CRM Info** tab) of the *Business Accounts* form, to *Customer*. (If the account has been extended as both a customer and a vendor, the type of the account is changed to *Customer & Vendor*.)

If you create a sales order from the *Opportunities* (CR304000) or *Sales Quotes* (CR304500) form, the system automatically extends the selected business account to be a customer. When you click the **Create Sales Order** or **Convert to Order** command on the More menu of the *Opportunities* or *Sales Quotes* form, respectively, the system opens the **Create Sales Order** dialog box. The dialog box includes the **Customer** section, which contains the settings of the customer that will be created when the business account is extended. When you click **Create & Review**, the system creates a new customer based on the existing business account. If the system requires more information for the creation of a customer of the selected customer class, the dialog box displays an error message, and the **Create Customer** button appears in the dialog box. When you click the button, the created customer is opened on the *Customers* form in a new browser tab. You can then fill in all the required information and save the customer.

Business accounts and customers share the same statuses, which are displayed in the **Customer Status** box of the Summary area of the *Business Accounts* and *Customers* forms. The status of a particular business account or customer may be one of the following: *Prospect*, *Active*, *On Hold*, *Credit Hold*, *One-Time*, or *Inactive*.

A Business Account Extended as a Vendor

You extend a business account to be a vendor account by clicking **Extend as Vendor** on the form toolbar or More menu of the *Business Accounts* (CR303000) form. The system opens the *Vendors* (AP303000) form with the appropriate settings copied from the business account. On the form, you specify the vendor class, the financial settings, and additional settings (such as billing address) that may be used in Acumatica ERP documents of the vendor. You then save the vendor.

When you save the vendor, the system changes the type of the business account, shown in the **Type** box (**CRM Info** tab) of the *Business Accounts* form, to *Vendor*. If a prospective customer has been extended as both customer and vendor, the type of the account is changed to *Customer & Vendor*.

The statuses of a vendor are independent from the statuses of a business account. The status of a vendor, shown in the **Vendor Status** box of the *Vendors* (AP303000) form, can be one of the following: *Active*, *On Hold*, *Hold Payments*, *Inactive*, and *One-Time*. You can manually change the status of the vendor. Changes to the status of the vendor do not cause changes to the status of the associated business account (or customer, if the vendor is also a customer). Similarly, if the status of the business account changes, the system does not change the status of the associated vendor.

Business Accounts: To Create a Business Account Manually

The following activity demonstrates how to manually create a business account, review and update the settings of the newly created account, and associate a primary contact with the account.

Story

You have received an inquiry submitted via the company's website form by Debbie Euston, the assistant bakery manager at Delicious Crispy, a bakery that bakes pastries, usually with jam filling. Debbie is considering purchasing 100 jars of apple jam. You have created the lead in the system, emailed the company's price list to Debbie, and called her, and Debbie confirmed her interest in purchasing the jam. You have created a contact, and now you need to create a business account in the system.

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.
  - *Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality.
- On the *Duplicate Validation* (CR103000) form, duplicate validation settings for business accounts have been specified.
- On the *Business Account Classes* (CR208000) form, the *BAKERY* business account class has been defined in the system.
- On the *Contacts* (CR302000) form, the *Debbie Euston* and *Patrick Roberts* contacts have been created in the system.

Process Overview

In this activity, you will do the following

1. By using the *Contacts* (CR302000) form as a starting point, create a business account manually based on a contact that has been added to the system.
2. By using the *Business Accounts* (CR303000) form, do the following:
   a. Review and update the settings of the newly created business account.
   b. Select a primary contact for the newly created business account.
   c. Select an owner for the newly created business account.

System Preparation

Before you start creating a business account, 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 Business Account Based on a Contact

To create a business account for the contact *Debbie Euston*, and specify additional settings for it (its primary contact and its owner in your company who will work with the account) do the following:

> You can perform similar instructions to create a business account by using the *Leads* (CR301000) form as a starting point.

1. Open the *Debbie Euston* contact record on the *Contacts* (CR302000) form.

2. On the More menu, under **Record Creation**, click **Create Account**.
3. In the **Create Account** dialog box, which opens, do the following:
   a. On the **Main** tab of the dialog box, specify the settings of the business account as follows:
      a. In the **Business Account ID** box, type `DELICRISP`.
      b. In the **Business Account Class** box, select *BAKERY*.
   b. Click **Create & Review**. The system creates a business account and opens the newly created account on the *Business Accounts* (CR303000) form.
4. On the **Contacts** tab of the form, notice that the row has been added for the *Debbie Euston* contact associated with the business account. Also notice that the **Primary** check box is cleared for the contact.
5. On the **General** tab, in the **Name** box of the **Primary Contact** section, select the *Debbie Euston* contact. Notice that the **Primary Contact** section has become populated with the data from the associated contact.
6. On the **Contacts** tab, you can see that the **Primary** check box has been selected for the *Debbie Euston* contact because the contact was defined as primary for the business account.
7. On the **Relations** tab of the form, notice that the row has been added for the *Debbie Euston* contact associated with the business account. Also notice that the *Source* relational role is assigned to the contact meaning that the business account is created from the contact. For details, see *Managing Relations*.
8. In the **Owner** box of the Summary area, select *David Chubb*, because this is the user account to which you are signed in and you are the employee in your company who will primarily work with this business account.
9. Click Save and Close. The system returns you to the *Contacts* form. In the **Business Account** box of the Summary area, you can see the name of the business account: *DELICRISP—Delicious Crispy*.

> In situations where you do not want to specify additional settings for the business account until later, you could click **Create** to close the **Create Account** dialog box. In this case, the new business account would be created. Also, the name of the business account would be inserted in the **Business Account** box of the Summary area on the *Contacts* form, and the contact would be added to the **Contacts** tab of the *Business Accounts* form, but no primary contact would be specified in this business account.

You have created a business account for the *Debbie Euston* contact.

Step 2. Associating a New Contact with a Business Account

Suppose that Patrick Roberts, a new manager at Delicious Crispy has contacted you and asked to send him the SweetLife price list. You have created a new *Patrick Roberts* contact in the system and need to associate this contact with the *DELICRISP* business account.

To associate the *Patrick Roberts* contact with the *DELICRISP* business account, do the following:

1. Open the *Patrick Roberts* contact record on the *Contacts* (CR302000) form.
2. In the Summary area of the form, in the **Business Account** box, click the magnifier button.
3. In the lookup table that opens, select *DELICRISP*.
4. On the form toolbar, click **Save**.

You have associated a new contact with the business account. The system has added this contact on the **Contacts** tab of the *Business Accounts* (CR303000) form.

Step 3: Changing the Primary Contact for the Business Account

Suppose that Debbie Euston has been promoted to another job in the company, and now you should contact her colleague, Patrick Roberts. You have created the *Patrick Roberts* contact and associated this contact with the *DELICRISP* business account as described in the previous step.

To change the primary contact for the *DELICRISP* business account, do the following:

1. While you are still viewing the *Patrick Roberts* contact on the *Contacts* (CR302000) form, in the Summary area, click the Edit button right of the **Business Account** box.
2. On the **General** tab of the *Business Accounts* (CR303000) form, which opens in a pop-up window, in the **Name** box of the **Primary Contact** section, click the magnifier button.
3. In the lookup table, which opens, select *Patrick Roberts*. Notice that the **Primary Contact** section has become populated with the contact and address settings of the new primary contact. On the **Contacts** tab, you can see that the **Primary** check box has been selected for the *Patrick Roberts* contact because the contact was defined as primary for the business account (see the following screenshot).

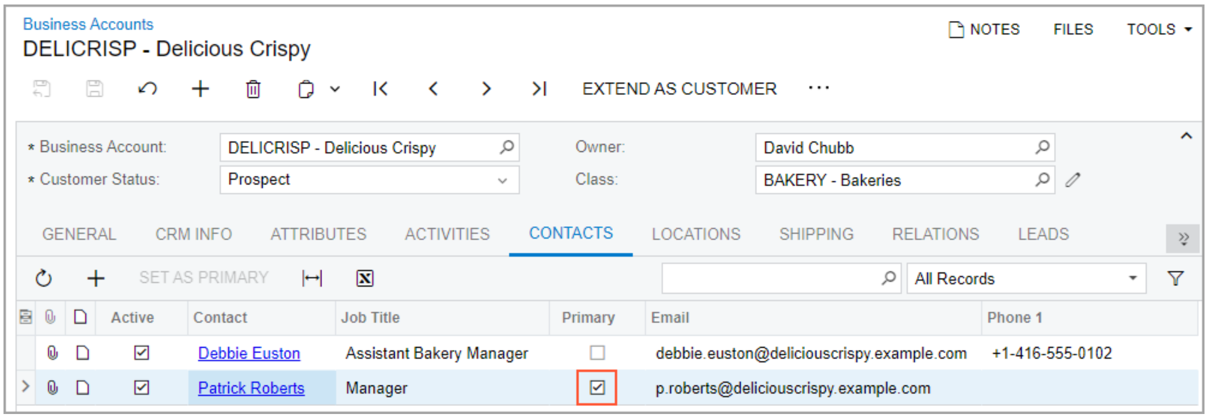


Figure: The primary contact for the business account

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

You have changed the primary contact for the *DELICRISP* account to *Patrick Roberts*.

Lesson 1.3: Creating Contacts

In this lesson, you will learn how to create a contact in several different ways.

Contacts: General Information

You can create contacts in Acumatica ERP to represent the people associated with leads and business accounts (and later customers, if a sale occurs, or even vendors). This topic provides information about creating contacts in Acumatica ERP.

> Contacts can be associated with a variety of entities in the system. In this lesson, we focus on contacts as they relate to the customer relationship management (CRM) functionality. That is, the lesson primarily discusses the contacts associated with prospective customers before they have purchased your company's products or services.

Learning Objectives

In this lesson, you will do the following:

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

Applicable Scenarios

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

- An employee of your company has contacted a lead and confirmed the contact information and the interest in company's products or services, and you need to convert the lead to an opportunity.
- You have been assigned to a lead whose contact information and interest in the company's products or services has been confirmed.

Contacts in Acumatica ERP

In Acumatica ERP, a contact is a record on the *Contacts* (CR302000) form that represents an individual and that can be associated with a variety of entities in the system. When you create a contact record, you enter the settings related to the information you have obtained, such as the individual's name, address, email address, and phone number.

If you have created a lead in the system before you create the related contact, you specify the lead's basic contact information on the **Contact Info** tab of the *Leads* (CR301000) form. When you create a contact for this lead, the system copies the contact information of the lead to the associated contact.

Any contact can be associated with one lead or multiple leads and with only one business account. You can synchronize contact information in the associated lead, contact, and business account to keep your data consistent and reliable. You can also easily navigate between the associated contacts, leads, and business accounts. For more information on business accounts, see *Creating Business Accounts*.

Contact Creation in Acumatica ERP

In Acumatica ERP, you can create contacts in multiple ways depending on your company's business processes and maintain them on the *Contacts* (CR302000) form. If you use customer relationship management (CRM) functionality and you are processing a lead for which the contact information and interest in buying the company's products or services have been confirmed, you can convert the lead to an opportunity, which may involve the creation of a business account and a contact for this lead. You can validate an individual lead for duplicates before you create a contact. For details, see *Validating Records for Duplicates*. You can also create a contact manually if needed.

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

- On the *Leads* (CR301000) form when you convert the lead selected on the form to an opportunity: You click **Convert to Opportunity** on the More menu. In the **Create Opportunity** dialog box, which opens, you specify the opportunity and business account settings. (The system automatically inserts the basic settings for the contact based on the settings of the lead, but you can override any of them.) You then click **Create** or **Create & Review** to create the opportunity and contact. For detailed instructions, see *Lead Qualification by Sales Teams: To Convert a Lead to an Opportunity*.
- On the *Leads*, *Business Accounts* (CR303000), *Opportunities* (CR304000), *Vendors* (AP303000), or *Customers* (AR303000) forms if you create a contact associated with the entity selected on the form: You click **Create Contact** on the More menu. In the **Create Contact** dialog box, which opens, you specify the basic contact settings, and then you click **Create** or **Create & Review** to create the contact. (You can specify additional settings on the *Contacts* form.)

- On the *Leads* or *Opportunities* form if you specify the settings of the primary contact when you create a business account for the selected lead or opportunity: You start to create the account by clicking **Create Account** on the form toolbar. In the **Create Account** dialog box, which opens, you specify the basic business account and contact settings, and click **Create** or **Create & Review** to create the business account and contact.
- Directly on the *Contacts* (CR302000) form: In this case, you add a new record and manually enter the settings of the new contact.
- By uploading new contacts from an Excel file on the *Marketing Lists* (CR204000) or *Marketing Campaigns* (CR202000) form. For details, see *Marketing Lists: General Information* and *Marketing Campaigns: General Information*.
- By creating a contact from the Acumatica add-in for Outlook, based on the details of the selected email recipient or sender: For detailed instructions, see *Contacts: To Create a Contact by Using the Acumatica Add-In for Outlook*
- Directly by using the Acumatica ERP mobile app: For detailed instructions, see *Contacts: To Create a Contact by Using the Acumatica Mobile App*.
- By using import scenarios to import lists of contacts on the *Import by Scenario* (SM206036) form. You can use the predefined *Import Contacts from Excel* import scenario.

The system assigns the *Active* status to a new contact; this status, displayed in the **Status** box of the Summary area on the *Contacts* form, indicates that the contact is available in lookup tables for the **Contact** element on various forms. If the contact is no longer applicable (for example, the person represented by the contact has resigned from the company you are working with), you can select the *Inactive* value in the **Status** box. If a contact is inactive, this contact cannot be selected in lookup tables for the **Contact** element on forms.

Regardless of how you create the contact, you can select a contact class on the *Contacts* form or in one of the dialog boxes mentioned above, which causes the system to insert default settings for the contact, easing the process of contact creation. (For details, see *Defining Contact Classes*.)

The *Contacts* form contains the complete settings of the contact, which you can view and edit. On the **Activities** tab of this form, you can create and work with all the activities related to the contact, including planned, current, and completed activities. For details, see *Managing Emails and Activities*.

Contact Relations with Acumatica ERP Entities

Once a contact has been defined in the system on the *Contacts* (CR302000) form, it can be associated with any of the following entities in Acumatica ERP:

- Leads: A lead or multiple leads can be associated with a contact. On the **Leads** tab of the *Contacts* form, you can see the list of leads associated with the contact.
- Business accounts: In the **Business Account** box of the Summary area of the *Contacts* form, an associated business account may be specified for a contact. Multiple contacts can be associated with one business account, but only one primary contact can be selected for an account. For details, see *Creating Business Accounts*.
- Marketing lists: A contact may be added to a marketing list and subscribed to newsletters and other mailings. On the **Marketing Lists** tab of the *Contacts* form, you can see all marketing lists that are created and active. For more information about marketing lists, see *Managing Marketing Lists*.
- Marketing campaigns: On the **Campaigns** tab of the *Contacts* form, you can view a list of all completed, ongoing, and planned marketing campaigns in which the contact is involved. For details about campaigns in Acumatica ERP, see *Managing Marketing Campaigns*.
- Opportunities: The **Opportunities** tab of the *Contacts* form lists all opportunities linked to the contact.
- Cases: The **Cases** tab of the *Contacts* form contains a list of all cases associated with the contact.
- Users: A contact may be associated with an external user (which is the same person as the contact represents) that may have access to the system. You can use the **User Info** tab of the *Contacts* form to view and edit information about the user account associated with the contact and to select a role that defines a set of the user's access rights to the system.

> If the contact associated with the user account becomes inactive, the user account will then be disabled, and you cannot enable it until the contact is active again.

- Employees: When the employee record is created and saved in the system, the system creates a contact for this employee and associates this employee record with this contact record. You can see the contact information on the *Employees* (EP203000) form, in the **Contact Info** section on the **General** tab.

As you work with a contact in Acumatica ERP, you can track the records associated with the contact on the **Relations** tab of the *Contacts* form. For details, see *Managing Relations*.

Contacts: To Create a Contact Manually

The following activity demonstrates how to manually create a contact, review and update the settings of the newly created contact.

Story

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

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 marketing campaigns.
  - *Duplicate Validation* in the *Customer Management* group of features: This feature provides the duplicate validation functionality.
- On the *Duplicate Validation* (CR103000) form, duplicate validation settings have been specified.
- On the *Contact Classes* (CR205000) form, the *BAKERY* contact class has been created.
- On the *Leads* (CR301000) form, a lead record for the *Thomas Jones* lead has been created and converted to an opportunity as follows:
  a. On the *Opportunities* (CR304000) form, the *Sale of 100 jars of cherry jam to Pro Muffin* has been created.
  b. On the *Business Accounts* (CR303000) form, the *PROMUFFIN* business account has been created.
  c. On the *Contacts* (CR302000) form, the *Thomas Jones* contact has been created.

Process Overview

In this activity, you will do the following:

1. Manually create a contact by using the *Contacts* (CR302000) form.
2. Associate the newly created contact with an existing opportunity on the *Opportunities* (CR304000) form.

System Preparation

Before you start creating a contact manually, 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 Contact Manually

To create a contact for Tina Parker, a finance manager at Pro Muffin, do the following:

1. On the *Contacts* (CR302000) form, add a new record.
2. On the **Details** tab do the following:
    a. In the **Contact** section, specify the contact settings as follows:
        a. In the **First Name** box, type `Tina`.
        b. In the **Last Name** box, type `Parker`.
        c. In the **Account Name** box, type `Pro Muffin`.
        d. In the **Job Title** box, type `Finance Manager`.
        e. In the **Email** box, type `tina@promuffin.example.com`.
    b. In the **Address** section, specify the address settings as follows:
        a. In the **Address Line 1** box, type `4897 Mapleview Drive`.
        b. In the **City** box, type `Philadelphia`.
        c. In the **State** box, select *PA*.
        d. In the **Postal Code** box, type `63463`.
        e. In the **Country** box, select *US*.
3. On the **CRM Info** tab, in the **Contact Class** box, select *BAKERY*.
4. On the form toolbar, click **Save**.

You have created the *Tina Parker* contact in the system.

Step 2. Associating the Contact with an Existing Opportunity

To associate the *Tina Parker* contact you have created with the opportunity that has been created for Pro Muffin, do the following:

1. Open the opportunity *Sale of 100 jars of cherry jam to Pro Muffin* on the *Opportunities* (CR304000) form.
2. Open the **Relations** tab.
3. Click **Add Row** on the table toolbar, and specify the following settings in the row:
    a. **Role**: *Decision-Maker*
    b. **Contact**: *Tina Parker*
    c. **Add to CC**: Selected.

        With this check box selected, the *Tina Parker* contact's email address will be added to each email notification automatically sent to this contact.

    Notice that in the **Type** column, *Contact* has been inserted automatically, as shown in the following screenshot. Only a record of the *Contact* type can be a *Decision-Maker*.

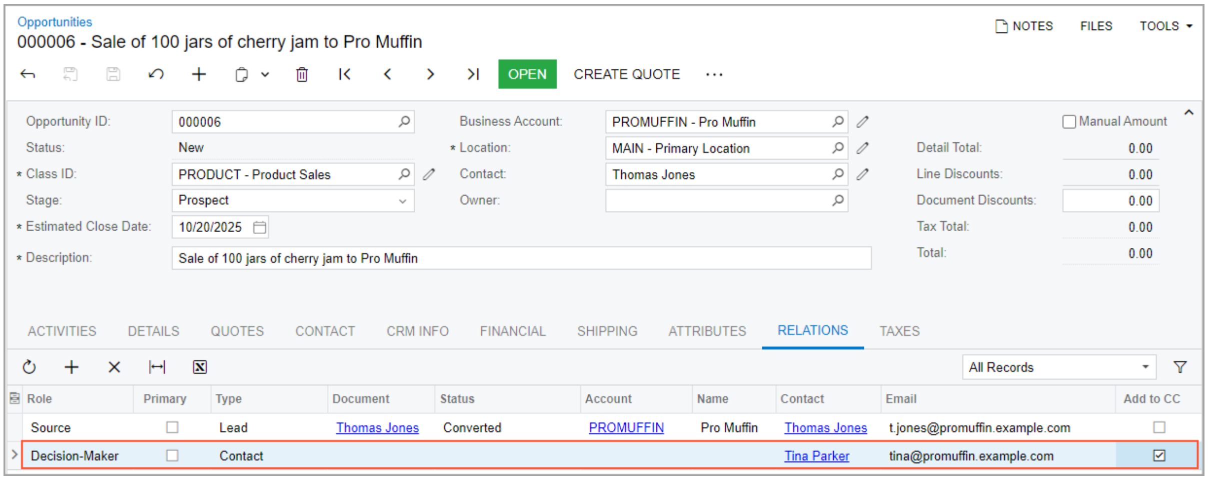


Figure: The contact associated with the opportunity

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

You have associated the *Tina Parker* contact with the opportunity created for Pro Muffin.

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

The following activity demonstrates how to create a contact by using the Acumatica mobile app.

Story

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

> You can find detailed instructions on creating a business account through the Acumatica mobile app in *Business Accounts: To Create a Business Account by Using the Acumatica Mobile App* and detailed instructions on creating an opportunity in *Opportunities: To Create an Opportunity by Using the Acumatica Mobile App*.

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Business Accounts* (CR303000) form, the *STOREHUT* business account has been created and extended as a customer.

System Preparation

Before you start creating a new contact in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating a contact in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.

   > The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see *Preparation for the Acumatica ERP Installation: System Environment*.

Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create a contact by using the Acumatica mobile app.

Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.
2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).
3. Optional: In the **Account Name** box, specify the name of the user account.
4. Tap **Next**.
5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

Step 2: Creating a Contact by Using the Acumatica Mobile App

To create a contact on the fly by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.
2. In the **CRM** workspace, tap the Plus button next to the **Contacts** tile.

   The **Summary** tab of the Contact Summary screen opens.

3. Specify the following settings:
   - **First Name**: `Eva`
   - **Last Name**: `Johnson`
   - **Job Title**: `Director of Supply Chain`
4. In the **Business Account** box, select *STOREHUT*.
5. Swipe upward and tap **Details**. This expands the group of related elements.
6. In the **City** box, specify `New York`.
7. Make sure that in the **Country** box, *United States of America* is specified.
8. Tap the **Other** tab of the screen.
9. Tap **CRM Info** to expand the group of related elements.
10. In the **Contact Class** box, select *Supermarkets, stores, groceries*.

11. Tap the **Save** button to save the contact.

Lesson 1.4: Managing Emails and Activities

In this lesson, you will learn how to create an email, an activity of the *Phone Call* type, and a task. For more information about events, see *Lesson 2.3: Managing Events*.

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

Use of Emails and Activities in Acumatica ERP

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

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

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

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

Pinning of Emails and Activities

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

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

Tracking of Communication with Leads in Acumatica ERP

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

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

The Activities Tab

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

All activities (including current, completed, and not-yet-started ones) related to the selected entity—that is, the lead, contact, business account, opportunity, case, marketing list, marketing campaign, project, or project task you are viewing—are listed on the **Activities** tab. You can view the details of the task, event, or activity by clicking the value in the **Summary** column, which is a link to the corresponding task, event, or activity.

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

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

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

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

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

    - If the exclamation mark (!) appears, the priority level is high.
    - If the black arrow (⬇) is displayed, the priority level is low.
    - If the column is empty, the priority level is normal.
- Note the column with the Reminder Icon () in the column header, which indicates whether a reminder has been configured for the activity. If this column is empty for a particular row, a reminder was not set for the activity. If a white bell () is displayed in this column, a reminder has been configured for the activity.

Emails and Activities: Emails

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

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

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

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

Configuration of Mailing Settings

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

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

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

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

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

- The email address from which the email will be sent; if none is specified, the system will use the default system email account

- The notification template based on which the email body will be generated
- The report that will be attached to the email and the format of the attachment
- The list of recipients

Order of Applying Mailings

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

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

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

Creation of Emails from a Data Entry Form

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

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

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

Emails Created from a Data Entry Form

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

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

- If on the *Email Preferences* (SM204001) form, the **Send User Emails Immediately** check box is selected, sends the email at once and assigns it the *Processed* status.

- Assigns it the *Pending Processing* status and adds it to the outgoing mail on the *Send and Receive Email* (SM507010) form. On this form, it can be sent manually. If a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed.

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

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

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

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

Creation of an Email for a Task or Event

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

Creation of a Response Email

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

Creation of an Email Activity from a Workspace

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

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

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

Creation of an Email from a Template

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

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

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

Copying of Lead-Related Emails to Related Entities

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

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

Deleting Emails

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

Emails and Activities: Activities

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

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

Creation and Tracking of Activities for an Entity

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

- *Business Accounts* (CR303000)
- *Cases* (CR306000)
- *Contacts* (CR302000)

- *Employees* (EP203000)
- *Leads* (CR301000)
- *Marketing Campaigns* (CR202000)
- *Marketing Lists* (CR204000)
- *Mass Emails* (CR308000)
- *Project Quotes* (PM304500)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)

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

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

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

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

Copying of Lead-Related Activities to Related Entities

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

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

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

Notifications About Assigning an Activity to an Owner

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

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

  To start sending notifications about these events, the system administrator should activate the *CRNewActivity* business event on the *Business Events* (SM302050) form.

- If you are the owner of a related entity (such as a lead, a contact, a business account, an opportunity, or a case) and one of the following events for which you are not the creator has happened:
  - An activity has been created for the related entity and assigned to another user.
  - An existing activity associated with the related entity has been reassigned to another user.
  - An existing activity has been recently associated with this related entity and assigned to another user.

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

For details, see *Business Events*.

Emails and Activities: Tasks

In Acumatica ERP, you can create tasks that are associated with entities related to customer relationship management (CRM), such as leads, contacts, business accounts, mass emails, marketing lists, marketing campaigns, opportunities, sales quotes, and cases; the tasks may also be associated with projects, project tasks, project quotes, customers, vendors, and employees. While viewing any of these entities on its data entry form, you can create a task associated with it and track all tasks (and other activities) related to the entity.

Creation and Tracking of Tasks for an Entity

You can create a task associated with any of these entities by clicking the **Create Task** button on the table toolbar of the **Activities** tab of any of the following forms:

- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Mass Emails* (CR308000)
- *Marketing Lists* (CR204000)
- *Marketing Campaigns* (CR202000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)
- *Employees* (EP203000)
- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)
- *Customers* (AR303000)
- *Vendors* (AP303000)

When you click the **Create Task** button, the *Task* (CR306020) form opens in a pop-up window, where you can specify the needed details. By default, the system inserts your username in the **Owner** box of the **Details** tab, but you can reassign the task to another owner. When you have saved the task and closed the form, the system adds a row with the *Task* type to the **Activities** tab of the form.

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

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

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

If a system administrator has enabled the use of reminders in Acumatica ERP, you can set up a reminder for a task. On the **Details** tab of the *Task* form, you select the **Reminder** check box and specify on which day and time before the due date the task owner should receive the reminder (in the **Remind At** box). On the specified date and time, the reminder will appear on the task owner's Acumatica ERP screen so that the creator or the owner can complete the task or change its status. For the information about how to turn on reminders, see *To Enable Reminders*.

Copying of Lead-Related Tasks to Related Entities

If you create tasks related to a lead, and then you create a contact or business account for the lead or convert the lead to an opportunity, the system copies all the tasks (and other activities) listed on the **Activities** tab of the *Leads* (CR301000) form to the same tab of the *Contacts* (CR302000), *Business Accounts* (CR303000), or *Opportunities* (CR304000) form, respectively. The system copies the activities to the opportunity from the lead only if the **Show Activities from the Source Lead** check box is selected on the *Opportunity Classes* (CR209000) form for the opportunity class that is specified in the **Opportunity Class** box of the **Create Opportunity** dialog box. Thus, the system preserves the history of tasks and other activities created for the lead and copies this history to the entities associated with the lead.

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

Task Management

By using the *Event and Task Categories* (EP204040) form, you can create a list of task categories and provide a color code for each category. If you do, when you open the list of your tasks on the Tasks (EP4040PL) form, you will see the tasks highlighted with colors corresponding to the categories.

Notifications About Assigning a Task to an Owner

In Acumatica ERP, a system administrator can set up the automatic built-in notifications about the assigning of tasks with the *Open* or *Processing* status. You can receive these notifications by email in the following scenarios:

- If you are assigned to a new task and the creator of the task is other user.

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

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

For details, see *Business Events*.

Emails and Activities: Time Reporting

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

Time Reporting

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

Emails and Activities: To Create an Email

The following activity will demonstrate how to create an email.

Story

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

Configuration Overview

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

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

Process Overview

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

System Preparation

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

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

Step: Creating an Email

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

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

   `Dear Donna,`

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

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

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

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

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

Emails and Activities: To Track a Phone Call

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

Story

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

Configuration Overview

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

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

- On the *Leads* (CR301000) form, the *Tim Bonner* lead has been added to the system.

Process Overview

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

System Preparation

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

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

Step: Creating an Activity of the Phone Call Type

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

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

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

Emails and Activities: To Create a Task

The following activity will demonstrate how to create a task.

Story

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

Configuration Overview

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

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

Process Overview

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

System Preparation

Before you start creating a task, 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: Creating a Task

To create a task related to the *Donna Coleman* lead, do the following:

1. On the *Leads* (CR301000) form, open the *Donna Coleman* lead.
2. On the More menu, under **Activities**, click **Create Task**. The *Task* (CR306020) form opens in a pop-up window. Notice that in the **Related Entity** box, the *Donna Coleman* lead is specified.
3. On the **Details** tab, specify the following settings:
   - **Summary**: `Preparing for the meeting with D. Coleman`
   - **Start Date**: The current date
   - **Due Date**: The current date
   - **Completion (%)** (The percent of the task completion): `5`
   - **Reminder**: Selected if you want a reminder about the task to be sent to you (as David Chubb, the owner of this task)
   - **Remind At**: The current date and any time in the near future, such as five minutes from now
   - **Status**: *Processing*
   - **Priority**: *Normal*
   - **Category**: *Green*

   Organizations can use these informational categories as they deem appropriate to help users prioritize tasks. For SweetLife, the *Green* category and highlighting in green means that the task is a usual planned work activity. The categories that can be used for events are defined on the *Event and Task Categories* (EP204040) form. The *Green* is one of the predefined categories, but others can be added to the form and selected for tasks.
4. In the text area, type: `Prepare current price list and any discounts we can offer.`
5. On the form toolbar, click Save and Close. The system closes the *Task* form and returns you to the *Leads* form.
6. Open the **Activities** tab. Notice that a row with the *Task* type is added to the table on the **Activities** tab of the *Leads* form for the lead.

Lesson 2: Managing Opportunities

In this lesson, you will learn how your sales team can create, manage, and work with opportunities before they are converted to orders.

Lesson 2.1: Creating Opportunities

In this lesson, you will learn how to create opportunities in multiple ways.

Opportunities: General Information

You define a sales opportunity in the system to track potential deals as they progress through your sales pipeline toward closing. This topic provides information about creating opportunities in Acumatica ERP.

Learning Objectives

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

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

Applicable Scenarios

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

- A lead has contacted you and confirmed the intention to buy the company's products or services.
- An existing customer has confirmed the intention to again buy the company's products or services.

Creation of Opportunities in Acumatica ERP

In Acumatica ERP, an opportunity represents a potential, ongoing, or closed deal with a prospective or existing customer. An opportunity record, which is created on the *Opportunities* (CR304000) form, has a variety of settings, such as the prospect or customer’s contact information, the financial and shipping information, any emails and activities related to the opportunity, and any associated quotes, sales orders, and invoices. With these settings and the related documents, you can easily keep track of and update the most important information about the deal, as described in *Opportunities: Settings*. Each opportunity must have an opportunity class selected, which gives you the ability to use the opportunity workflow and stages, as described in *Opportunity Management: Opportunity Stages*.

An opportunity can be created in any of the following ways:

- On the *Leads* (CR301000) form if you click **Convert to Opportunity** on the More menu for a selected lead. When the lead confirms their interest in buying products or services (and thus the sales team considers the lead to be qualified), you can convert the lead to an opportunity and create an opportunity record in the system, as described in *Qualifying Leads (Sales)*.
- By manually entering opportunity data on the *Opportunities* form: For an existing customer, you can create an opportunity and associate the opportunity with an existing contact and business account by selecting the contact and business account. For a prospective customer, you can specify contact information on the **Contact** tab of the same form; you can then create an associated contact or both a business account and a contact by clicking **Create Contact** or **Create Account** on the More menu, respectively.
- By using the Acumatica mobile app: For an existing customer, you can create an opportunity and associate the opportunity with a contact and business account that have already been created in the system.
- By using an import scenario to import a list of opportunities on the *Import by Scenario* (SM206036) form. You can use an import scenario if you want to import opportunities from a legacy CRM system. You can use the predefined *Import Opportunities from Excel* import scenario.
- On the **Opportunities** tab of the *Contacts* (CR302000) form if you click **Add New Opportunity** on the table toolbar. You may want to create an opportunity on this tab if you are viewing a contact on this form and need to create an opportunity on the fly.
- On the **Opportunities** tab of the *Business Accounts* (CR303000) form for a business account of the *Business Account* or *Customer* type if you click **Add New Opportunity** on the table toolbar.
- On the **Opportunities** tab of the *Marketing Campaigns* (CR202000) form for a selected marketing campaign if you click **Add New Opportunity** on the table toolbar.
- By using the Acumatica add-in for Outlook based on the details of a selected email recipient or sender.

Creation of Opportunities Through Lead Conversion

As a rule, during lead conversion, you create a contact and a business account (if they have not yet been created in the system), which the system associates with the sales-qualified lead. A business account must be created before or during the lead conversion for leads of a class if the **Require Account for Conversion to Opportunity** check box (in the **Conversion Settings** section of the **Details** tab) on the *Lead Classes* (CR207000) form is selected.

On the **Details** tab of the *Opportunity Classes* (CR209000) form, if the **Show Activities from Source Lead** check box is selected, the activities associated with the lead (which are listed on the **Activities** tab of the *Leads* form) become associated with the newly created opportunity, and you can track the history of communication with the lead, from creation in the system to conversion to an opportunity.

Processing of an Opportunity Through Statuses

As an opportunity is being processed by a sales team, it progresses through various statuses. The current status of an opportunity is displayed in the **Status** box in the Summary area of the *Opportunities* (CR304000) form.

In Acumatica ERP, an opportunity may be assigned one of the following statuses:

- *New*: The opportunity has been created, but no work has been done on it yet.
- *Open*: The opportunity is being worked on by a sales team.
- *Won*: The deal has been successfully closed.
- *Lost*: The deal has been canceled.

You can change the status of an opportunity by clicking any of the following commands on the More menu of the *Opportunities* form and selecting a reason for the change and a stage of the opportunity in the **Details** dialog box:

- **Open**: Changes the status to *Open*
- **Close as Won**: Changes the status to *Won*
- **Close as Lost**: Changes the status to *Lost*

As the opportunity is assigned different statuses, you can select the applicable stage of the opportunity. For details, see *Opportunity Management: Opportunity Stages*.

A system administrator can configure notifications related to the statuses of opportunities. For more information, see *Business Events: Use of a Data Entry Form as a Source*.

Opportunities: Settings

You can use and modify the settings on the *Opportunities* (CR304000) form to track the information related to the opportunity. You can do the following:

- On the **Activities** tab, add and work with emails, tasks, and activities associated with an opportunity. For details, see *Managing Emails and Activities*.
- On the **Details** tab, specify the details of the products or services (such as the specific inventory items, quantities, and prices) that are to be sold to a customer. For details, see *Opportunity Management: Products and Services in an Opportunity*.
- On the **Quotes** tab, view and add any sales quotes and project quotes associated with the opportunity. For details, see *Opportunity Management: Sales Quotes* and *Project Quotes: Creation of Project Quotes from Opportunities*.
- On the **Contact** tab, view and modify the customer's contact information. For details, see , *Opportunities: Address Management Through a Third-Party Provider*.
- On the **CRM Info** tab, view or modify the CRM-related settings, such as the workgroup, the forecasting settings, the source settings, and dates of last incoming and outgoing activities.
- On the **Financial** tab, view and modify the customer's billing settings, financial settings, and branch and project associated with the opportunity.
- On the **Shipping** tab, view and modify the customer's shipping settings and tax settings. For details, see and *Taxes*.
- On the **Attributes** tab, view the list of attributes, which may be used to help your company manage specific information useful for its business, such as the industry or number of employees. For details, see *Attributes* and *User-Defined Fields*.
- On the **Relations** tab, find the information about the relations between the opportunity and any associated entities. For details, see *Managing Relations*.
- On the **Taxes** tab, view the information the system has added about the taxes related to the products or services that are to be sold to the customer. For details, see *Taxes*. The settings on this tab depend on location settings. For details, see *Customers: Customer Locations*.
- On the **Discounts** tab, review the information about discounts related to the products or services that are to be sold to the customer. This tab is available only if the *Customer Discounts* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Copying of Settings from Contacts and Business Accounts to Opportunities

In Acumatica ERP, contact and address settings are copied to an opportunity when you specify an account in the **Business Account** box in the Summary area of the *Opportunities* (CR304000) form. The contact information from the business account or contact specified in the Summary area of the *Opportunities* form is displayed on the **Contact** tab as read-only by default, but you can modify it if you select the **Override** check box on this tab.

If you modify the contact or address settings of a contact or business account associated with an opportunity on the *Contacts* (CR302000) or *Business Accounts* (CR303000) form, the settings displayed on the **Contact** tab of the *Opportunities* form will not be changed unless you select and then clear the **Override** check box on the **Contact** tab of the *Opportunities* form.

Also, if you select a different business account for an opportunity, the system replaces the existing contact settings specified on the **Contact** tab of the *Opportunities* form with the new settings of the contact associated with the newly selected business account.

The overriding of settings applies to all the settings on the **Contact** tab of the *Opportunities* form.

Shipping Settings in Opportunities

When you create an opportunity on the *Opportunities* (CR304000) form, the system searches for shipping settings in the following entities and populates the **Ship-To Address** section of the **Shipping** tab with the first data it finds:

1. The project specified in the opportunity. If the **Calculate Project-Specific Taxes** check box on the **General** tab of the *Projects Preferences* (PM101000) form is selected, the data in the **Ship-To Address** section are copied from the project settings that are specified in the **Project Address** section on the **Addresses** tab of the *Projects* (PM301000) form.
2. The location specified for the opportunity in the **Location** box of the Summary area. The system copies the information to the **Ship-To Address** section from the **General** tab of the *Account Locations* (CR303010) form.

To populate the data in other sections on the **Shipping** tab of the *Opportunities* form, the system copies the corresponding data from the **General** and **Shipping** tabs of the *Account Locations* form.

By default, the shipping settings populated by the system on the **Shipping** tab of the *Opportunities* form (in the **Ship-To Address** and **Ship-To Info** sections) are displayed as read-only, and the **Override** check boxes in these sections are cleared. If you select the **Override** check box in the corresponding section, you can modify its settings on the current form. If the system has inserted settings in the **Tax Settings** section and you change these settings, the applicable taxes are automatically recalculated for the opportunity on the **Taxes** tab if sales taxes have been configured in the system.

If at least one **Override** check box is selected on the **Shipping** tab, and you change the business account specified in the Summary area of the *Opportunities* form, the system opens a dialog box that asks whether you want the contact or address settings of the opportunity to be replaced with the settings of the new business account. If you click **No**, you can keep the previously specified contact or address settings; in this case, the **Override** check box remains selected on the **Shipping** tab to indicate that these settings of the opportunity differ from those of the contact, business account, or location selected in the Summary area.

> If you use the *Account Locations* or *Customer Locations* form at a later time to modify the contact or address settings for the location specified for an opportunity, the system does not change the settings on the **Shipping** tab of the *Opportunities* form unless you select and then clear the **Override** check box in the appropriate section on the **Shipping** tab of the *Opportunities* form.

Shipping Settings in Quotes, Sales Orders, and Invoices

The shipping settings specified for an opportunity on the *Opportunities* (CR304000) form are copied to any sales order, invoice, or quote that you create based on that opportunity.

If a primary quote exists for an opportunity, the shipping settings specified for the primary sales quote on the **Shipping** tab of the quote are synchronized with the shipping settings specified for the opportunity on the **Shipping** tab of the opportunity in both directions.

On the *Opportunities* form, if you modify the shipping settings specified for an opportunity that is already associated with a sales order, invoice, or non-primary sales quote, the changes you have made to the opportunity will not be reflected in the settings of the associated document. Similarly, changes in the shipping settings specified for a sales order, invoice, or non-primary sales quote are not reflected in the settings of the associated opportunity.

Opportunities: Address Management Through a Third-Party Provider

In Acumatica ERP, you can validate and enrich the addresses specified for opportunities through integration with a third-party software or service if an address provider is configured on the *Address Providers* (CS103000) form. For details on configuring the integration, see *Integrating Acumatica ERP with Address Validation Providers*.

You can also use the address provider to specify and validate addresses on all entry forms that have address settings, such as leads, contacts, business accounts, account locations, customers, and sales quotes.

Address Validation

With the address validation functionality, you can verify the addresses in a record through integration with a third-party provider. This functionality is available if the *Address Validation Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form (in the *Third-Party Integrations* group of features) and an address provider is configured on the *Address Providers* (CS103000) form.

For example, you can validate the addresses specified for an opportunity by clicking **Validate Addresses** on the More menu of the *Opportunities* (CR304000) form. If the specified addresses have been validated, the system selects the **Validated** check boxes on the **Contact** tab (**Address** section) and the **Shipping** tab (**Ship-To Address** section).

You can run validation for multiple business accounts at once by using the *Validate Addresses in Profiles* (CR509020) form.

Address Enrichment

Through integration with a third-party provider, you can use the address enrichment functionality. With this functionality, you can add a new address, update an existing address, and fill in the missing address information in a record. This functionality is available if the *Address Lookup Integration* feature is enabled on the *Enable/Disable Features* (CS100000) form (in the *Customer Management* group of features) and an address provider is configured on the *Address Providers* (CS103000) form.

You can add address settings based on the contact address of an opportunity (or another type of record). On the *Opportunities* (CR304000) form (in the **Address** section of the **Contact** tab), the **Address Lookup** button has been added. The button is displayed instead of the **View on Map** button, which is shown if the *Address Lookup Integration* feature is disabled on the *Enable/Disable Features* form. When you click the **Address Lookup** button, the **Address Lookup** dialog box opens, in which you can find the details of the company location. For details, see *Integrating Acumatica ERP with Web Map Services*.

Opportunities: To Create an Opportunity Manually

The following activity will help you create an opportunity manually in Acumatica ERP.

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Business Accounts* (CR303000) form, the *GROCERIEX* business account has been created in the system and extended as a customer with its settings specified on the *Customers* (AR303000) form.
- On the *Contacts* (CR302000) form, the *Kevin Grey* contact has been created in the system and associated with the *GROCERIEX* business account.
- On the *Opportunity Classes* (CR209000) form, the *PRODUCT* opportunity class has been created.
- On the *Stock Items* (IN202500) form, the *APPLES*, *KIWIS*, *ORANGES*, and *LEMONS* stock items (which hold the settings of one pound of each of these fruits) have been created.

Process Overview

In this activity, you will create an opportunity for the existing customer on the *Opportunities* (CR304000) form.

System Preparation

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

Step: Creating an Opportunity Manually

To manually create an opportunity with Kevin Grey of *GROCERIEX*, do the following:

1. Open the *GROCERIEX* business account record on the *Business Accounts* (CR303000) form.
2. On the More menu, under **Record Creation**, click **Create Opportunity**.
3. In the Summary area of the *Opportunities* (CR304000) form, which opens in a pop-up window with *GROCERIEX* selected as a business account, do the following:
    a. In the **Opportunity Class** box, select *PRODUCT*.
    b. In the **Stage** box, select *Development*.
    c. In the **Estimated Close Date** box, select the estimated date of the deal closure, for example, tomorrow's date.
    d. In the **Description** box, add `Sale of fresh fruit`.
4. On the form toolbar, click **Save**.
5. On the form toolbar, click **Open** to indicate in the system that you have started working on the opportunity.
6. In the **Details** dialog box, which opens, click **OK**.
7. On the **Activities** tab, specify the results of your phone discussion with Kevin Grey about the order of fruit as follows:
    a. On the table toolbar, click **Create Activity > Create Phone Call**.
    b. On the *Activity* (CR306010) form, which opens in a pop-up window, do the following:
        a. In the **Summary** box, specify a brief summary of the phone call with Kevin Grey by typing `Sale of apples, kiwis, oranges, and lemons`.
        b. In the text area, specify `The shipment should be scheduled for tomorrow morning.`
        c. On the form toolbar, click Save and Close to return to the *Opportunities* form with the opportunity open.
        d. On the **Activities** tab, notice that a row with the *Phone Call* type is added to the table.
8. On the **Details** tab, add four rows with the details of the items to be sold as follows:

- Row 1:
  - **Inventory ID**: *APPLES*
  - **Quantity**: 50
- Row 2:
  - **Inventory ID**: *KIWIS*
  - **Quantity**: 50
- Row 3:
  - **Inventory ID**: *ORANGES*
  - **Quantity**: 50
- Row 4:
  - **Inventory ID**: *LEMONS*
  - **Quantity**: 50

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

You have created an opportunity for the existing *GROCERIEX* customer.

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

The following activity demonstrates how to add to an opportunity any products or services that have not been defined in Acumatica ERP as stock or non-stock items with inventory IDs.

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Business Accounts* (CR303000) form, the *DELIENERGY* business account has been created in the system. It has also been extended as a customer, with its settings specified on the *Customers* (AR303000) form.
- On the *Contacts* (CR302000) form, the *Diane Doe* contact has been created in the system and associated with the *DELIENERGY* business account.
- On the *Opportunity Classes* (CR209000) form, the *PRODUCT* opportunity class has been created.

Process Overview

In this activity, you will create an opportunity for the existing *DELIENERGY* business account on the *Opportunities* (CR304000) form, add a pomegranate juicer without an inventory ID to the opportunity, and apply a $50 discount to the item.

System Preparation

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

Step: Creating an Opportunity with an Item Without an Inventory ID

To create an opportunity with Diane Doe of *DELIENERGY* to reflect her intention to buy one pomegranate juicer with a $50 discount, do the following:

1. On the *Opportunities* (CR304000) form, create a new record.
2. In the Summary area of the *Opportunities* form, do the following:
   a. In the **Opportunity Class** box, select *PRODUCT*.
   b. In the **Stage** box, select *Solution*.
   c. In the **Estimated Close Date** box, select the estimated date of the deal closure (for example, tomorrow's date).
   d. In the **Description** box, add `Sale of the new pomegranate juicer`.
   e. In the **Business Account** box, select *DELIENERGY*. Notice that in the **Contact** box, *Diane Doe* is selected.
   f. In the **Owner** box, select *David Chubb* to indicate that you are the owner of this opportunity.
3. On the form toolbar, click **Save**.
4. On the form toolbar, click **Open** to indicate in the system that you have started working on the opportunity.
5. In the **Details** dialog box, which opens, do the following:
   a. In the **Reason** box, select *In Process*
   b. In the **Stage** box, leave *Solution*
   c. Click **OK** to save the setting and close the dialog box
6. On the **Details** tab of the form (to which you return), add a row with the details of the item to be sold as follows:
   - **Inventory ID**: Empty
   - **Description**: `A pomegranate juicer`
   - **Quantity**: `1`
   - **Unit Price**: `4300`
   - **Discount Amount**: `50`

   A $50 discount is applied to the line.
7. On the form toolbar, click **Save**.

You have created an opportunity with the item that has no an inventory ID and applied the discount to the item.

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

The following activity will help you create an opportunity by using the Acumatica mobile app.

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Business Accounts* (CR303000) form, the *STORECART* business account has been created in the system and extended as a customer with its settings specified on the *Customers* (AR303000) form.
- On the *Contacts* (CR302000) form, the *Fred Robinson* contact has been created in the system and associated with the *STORECART* business account.
- On the *Stock Items* (IN202500) form, the *BLACKTEA06*, *FRUITTEA12*, and *GREENTEA06* stock items, which hold the settings of the products, have been created.

System Preparation

Before you start creating a new opportunity in the system by using the Acumatica mobile app, you should do the following:

1. Download and install the Acumatica mobile app on the mobile device that you will use for creating an opportunity in the system. The mobile app for iOS is available in the Apple Store and the mobile app for Android is available in Google Play.

   > The instructions in the activity steps below may slightly differ in the Acumatica mobile app depending on whether the device is running iOS or Android.

2. Make sure that the Acumatica ERP instance has been hosted over HTTPS or ask a system administrator to perform this task for you. For more information, see *Preparation for the Acumatica ERP Installation: System Environment*.

Process Overview

In this activity, you will do the following by using the Acumatica mobile app:

1. Sign in to the Acumatica mobile app.
2. Create an opportunity for an existing customer by using the Acumatica mobile app.

Step 1: Signing In to the Acumatica Mobile App

To sign in to the Acumatica mobile app, do the following:

1. On the mobile device, tap the application icon to launch the app.
2. Optional: If you are signing in for the first time, in the **Server URL** box, enter the URL of your Acumatica ERP instance (for example, *https://my.site.acumatica.com*).
3. Optional: In the **Account Name** box, specify the name of the user account.
4. Tap **Next**.

5. Sign in to the system as the sales manager by using the *chubb* username and the *123* password.

Step 2: Creating an Opportunity by Using the Acumatica Mobile App

To create an opportunity with the contact *Fred Robinson* of the *STORECART* customer by using the Acumatica mobile app, do the following:

1. On the main menu of the app, make sure that the *U100* tenant is selected.
2. In the **CRM** workspace, tap the Plus button next to the **Opportunities** tile.

   The **Summary** tab of the Opportunity screen opens.
3. Specify the settings as follows:
   - **Class ID**: Select *Product Sales*.
   - **Description**: Type `Sale of assorted teas, black, fruit, and green`.
   - **Stage**: Select *Development*.
   - **Business Account**: Select *STORECART*.
4. Tap the **Save** button to save the opportunity.
5. On the top of the screen, tap **Open**. This expands the **Details** group of elements.
6. In the **Details** group of elements, do the following:
   a. In the **Reason** box, select *In Process*.
   b. In the **Stage** box, select *Negotiation*.
   c. Tap **OK**.
7. On the **Details** tab, do the following to add the *BLACKTEA06* stock item:
   a. Tap the Plus button.
   b. In the **Inventory ID** box, select *BLACKTEA06*.
   c. In the **Quantity** box, type 50.
   d. Tap the **Update** button in the upper right of the screen.
   e. Tap the **Save** button in the upper right of the screen.
8. Add the *FRUITTEA12* stock item as follows:
   a. Tap the Plus button.
   b. In the **Inventory ID** box, select *FRUITTEA12*.
   c. In the **Quantity** box, type 50.
   d. Tap **Update**.
   e. Tap **Save**.
9. Add the *GREENTEA06* stock item as follows:
   a. Tap the Plus button.
   b. In the **Inventory ID** box, select *GREENTEA06*.
   c. In the **Quantity** box, type 50.
   d. Tap **Update**.
   e. Tap **Save**.

   On the **Details** tab, notice that the *BLACKTEA06*, *FRUITTEA12*, and *GREENTEA06* stock items have been added.

Lesson 2.2: Assigning Opportunities to Owners and Workgroups

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

Opportunity Assignment to Owners and Workgroups: General Information

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

Learning Objectives

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

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

Applicable Scenarios

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

- You need to have the system automatically assign opportunities to salespeople when leads are converted to opportunities.
- You need to manually assign or reassign an opportunity to another owner or workgroup.
- You do not work with leads in your system and need to assign opportunities to the appropriate owners, workgroups, or both without lead conversion.

Assignment of Opportunities to Owners and Workgroups in Acumatica ERP

In Acumatica ERP, you can easily base the rules for opportunity assignment on company policies because opportunities can be assigned to owners or workgroups in many different ways, based on the settings and attributes of the opportunity records being assigned. You can assign opportunities manually or automatically, through conversion of a lead to an opportunity.

You can automatically assign an opportunity to an owner by converting a lead to an opportunity if a default owner has been selected in the associated opportunity class.

You can manually assign an individual opportunity to an owner or workgroup. When you create or edit an opportunity on the *Opportunities* (CR304000) form, you can select an owner in the **Owner** box of the Summary area. To assign an opportunity to a workgroup, you select a workgroup in the **Workgroup** box (on the **CRM Info** tab of the *Opportunities* form) and then select the 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 opportunities that do not have owners specified by using the *Assign Opportunities* (CR503110) mass-processing form. On this form, you can assign selected opportunities or all opportunities that do not have owners, and the system uses the opportunity assignment map specified on the *Customer Management Preferences* (CR101000) form to determine the owners of the opportunities.

You can cause the system to automatically assign opportunities to owners by specifying a setting for each opportunity class that determines how the default owner is assigned to new opportunities of the class. On the **Details** tab of the *Opportunity Classes* (CR209000) form for the opportunity class, you select one of the predefined options in the **Default Owner** box, and the system specifies the default owner of a new opportunity of the class in the **Owner** box of the *Opportunities* (CR304000) form.

If you want the system to distribute opportunities 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 opportunity to workgroups or to owners in these workgroups.
2. Create the needed maps for the automatic assignment of opportunities 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 an opportunity that has been manually or automatically assigned in one of the following ways:

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

Assignment of Opportunities by Using Opportunity Classes

As noted previously, when you create or modify an opportunity class on the *Opportunity Classes* (CR209000) form, you can specify how the system automatically assigns the owner to newly created opportunities of the class by selecting the appropriate option in the **Default Owner** box on the **Details** tab (**Data Entry Settings** section). Based on the selected option for the opportunity class, when this opportunity class has been selected for an opportunity in the **Opportunity Class** box (Summary area) of the *Opportunities* (CR304000) form, the system determines the default owner of this opportunity and inserts the appropriate employee name in the **Owner** box in the Summary area of the form.

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

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

We recommend assigning opportunities by converting leads to opportunities or, if you manually create opportunities, by using opportunity classes because the system assigns an opportunity to an owner each time a new opportunity record is created.

The Usage of a Company Tree for Assignment

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

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

Assignment of Opportunities by Using Assignment Maps

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

An assignment map is a set of rules, actions related to rules, and conditions that the system can use for assigning a record or a number of records for processing to a particular individual or a group of people. An assignment map may include any number of rules, which are executed sequentially. Each rule in an assignment map includes conditions and actions to be performed if the conditions are met. You create assignment maps on the *Assignment Maps* (EP205010) form as follows (for detailed instructions on configuring assignment maps, see *Configuring Assignment Maps*):

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

Once an assignment map for opportunities is created, you can do either or both of the following:

- Specify the assignment map on the *Opportunity Classes* (CR209000) form for the opportunity class if you have selected *Assignment Map* in the **Default Owner** box on the **Details** tab: Each new opportunity of the class will be assigned to a default owner on the *Opportunities* (CR304000) form according to this map. A user can change the default owner as needed.
- Specify the assignment map on the *Customer Management Preferences* (CR101000) form in the **Opportunity Assignment Map** box of the **General** tab (**Assignment Settings** section): Existing opportunities that do not have owners will be assigned to owners based on this map as soon as you have assigned the opportunities by using the *Assign Opportunities* (CR503110) mass processing form.

> ⚠ If an assignment map is specified for the applicable opportunity class on the *Opportunity Classes* form, it overrides the assignment map specified on the *Customer Management Preferences* (CR101000) form. Opportunities of the class will be assigned to owners based on the assignment map from the opportunity class.

Execution Errors Related to Mass-Assignment of Opportunities

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 opportunities that should be assigned according to this assignment map by using the *Assign Opportunities* (CR503110) 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 an Opportunity 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 opportunity, this user receives a notification by email, by SMS, or in the Acumatica mobile app. For details, see *Business Events*.

Opportunity Assignment to Owners and Workgroups: Process Activity

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

Story

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

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- On the *Company Tree* (EP204061) form, the company tree has been configured. It includes the *Product Sales* and the *Project Sales* workgroups, as well as the employees in the *Sales* department.
- On the *Employees* (P203000) form, the *Pam Brawner*and *David Chubb* employees have been created , and included in the *Sales* department on the *Company Tree* form.
- On the *Opportunity Classes* (CR209000) form, the *PRODUCT*, *PROJECT*, and *SERVICE* opportunity classes have been created.
- On the *Assignment Maps* (EP205010) form, the *Opportunity Assignment Map* has been created. According to the rules (and their conditions and actions) specified in this assignment map, the opportunities of the *PROJECT* opportunity class are assigned to the *Project Sales* workgroup in the *Sales* department. The opportunities of the *PRODUCT* opportunity class are assigned to the *Product Sales* workgroup in the SweetLife *Sales* department.
- On the *Opportunities* (CR304000) form, the opportunity with the *Inquiry for exotic fruits* **Subject**, has been created.

Process Overview

In this activity, you will do the following:

1. On the *Opportunities* (CR304000) form, manually assign a particular opportunity to an owner.

2. On the *Opportunity Classes* (CR209000) form, specify how the system assigns the default owner of opportunities of a particular class.
3. On the *Assign Opportunities* (CR503110) form, assign selected opportunities to owners.

System Preparation

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

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

Step 1: Assigning an Opportunity to an Owner

To manually assign an opportunity to another owner, do the following:

1. Open the *Inquiry for exotic fruits* opportunity on the *Opportunities* (CR304000) form.
2. In the **Owner** box of the Summary area, select *Pam Brawner*.

   You can also manually assign a particular opportunity to a workgroup in the **Workgroup** box on the **CRM Info** tab (CRM section).

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

You have manually assigned an opportunity to another owner.

Step 2: Specifying a Default Owner for New Opportunities of the Class

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

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

1. Open the *SERVICE* opportunity class record on the *Opportunity Classes* (CR209000) form.
2. On the **Details** tab (**Data Entry Settings** section), in the **Default Owner** box, select *Creator*.
3. On the form toolbar, click **Save**.
4. Make sure that the option that you have just specified assigns new opportunities to owners correctly by doing the following:
   a. On the *Opportunities* (CR304000) form, add a new record.
   b. In the **Opportunity Class** box of the Summary area, select *SERVICE*.
   c. In the **Owner** box, notice that *David Chubb* is inserted in the box. Because this is the user account to which you are signed in and you are the creator of the opportunity, the setting of the opportunity class is causing the system to assign the owner appropriately.
   d. In the **Description** box, type `Juicer repair for Food Clever store`.
5. On the form toolbar, click **Save**.

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

Step 3: Assigning Multiple Opportunities to Workgroups

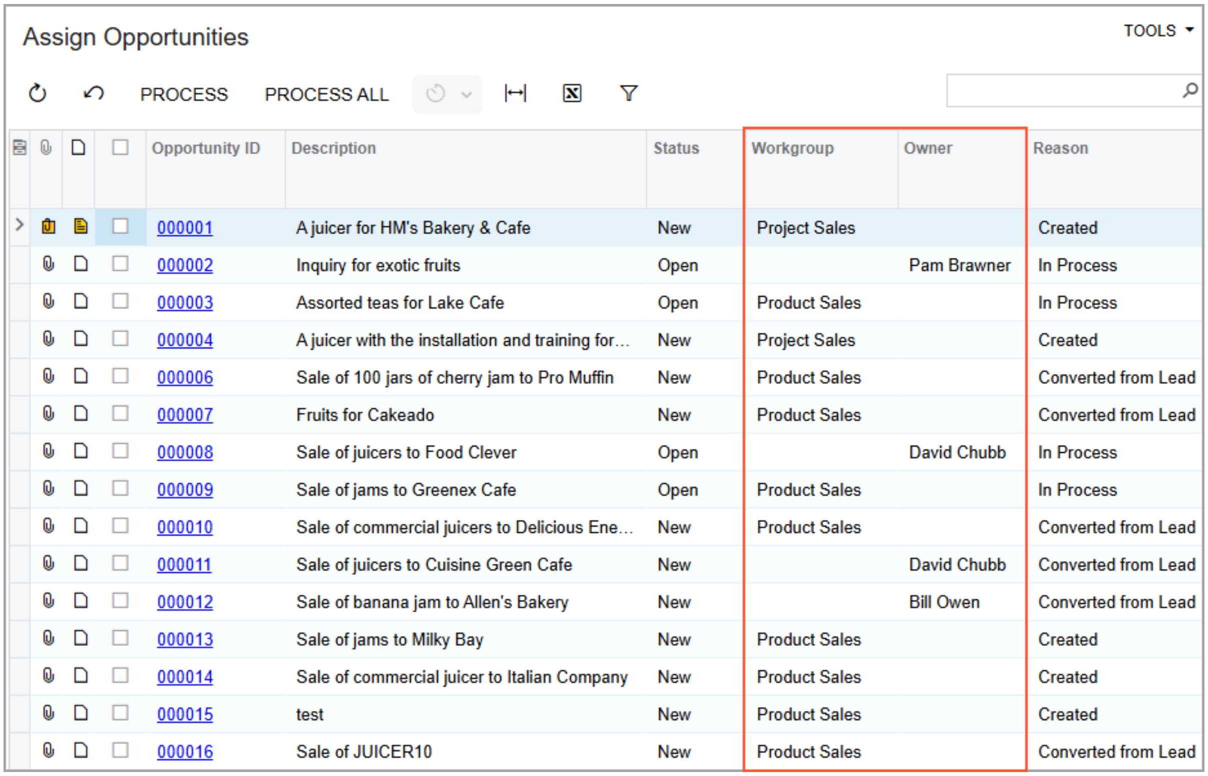
Suppose that at the request of the director of your sales department, you need to regularly mass-assign the unassigned opportunities of the *PRODUCT* and *PROJECT* opportunity classes to workgroups. The system will assign these opportunities by using the *Opportunity Assignment Map*, which has been specified on the *Customer Management Preferences* (CR101000) form. Based on this assignment map, the system will assign the opportunities of the *PROJECT* class to the *Project Sales* workgroup and the opportunities of the *PRODUCT* opportunity class to the *Product Sales* workgroup.

To mass-assign multiple opportunities to workgroups, do the following:

1. Open the *Assign Opportunities* (CR503110) form.
2. In the table, click the header of the **Owner** column.
3. In the Sorting and Filtering Settings dialog box, which opens, do the following to filter opportunities with no owner specified:
   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 the **Filter Settings** button.
5. In the **Filter Settings** dialog box, which opens, do the following to list the opportunities of the *PRODUCT* and *PROJECT* opportunity classes on the form, so that you can process these opportunities:
   a. Click **Add Row** to add a row to the table.
   b. In the **Property** box, select *Opportunity Class*.
   c. In the **Condition** box, select *Equals*.
   d. In the **Value** box, select *PRODUCT*.
   e. In the **Operator** box, select *Or*.
   f. Click **Add Row** to add another row to the table.
   g. In the **Property** box, select *Opportunity Class*.
   h. In the **Condition** box, select *Equals*.
   j. In the **Value** box, select *PROJECT*.
   k. Click **Apply** to apply the filter settings to the table and close the dialog box.
6. 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 the opportunities.

   > 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.

7. 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 opportunities. For the opportunities that did not have owners, in the **Workgroup** column, you can see the name of the workgroup to which the system has assigned the opportunities, as shown in the following screenshot.



Assign Opportunities

TOOLS

PROCESS PROCESS ALL

Opportunity ID	Description	Status	Workgroup	Owner	Reason
000001	A juicer for HM's Bakery & Cafe	New	Project Sales		Created
000002	Inquiry for exotic fruits	Open		Pam Brawner	In Process
000003	Assorted teas for Lake Cafe	Open	Product Sales		In Process
000004	A juicer with the installation and training for...	New	Project Sales		Created
000006	Sale of 100 jars of cherry jam to Pro Muffin	New	Product Sales		Converted from Lead
000007	Fruits for Cakeado	New	Product Sales		Converted from Lead
000008	Sale of juicers to Food Clever	Open		David Chubb	In Process
000009	Sale of jams to Greenex Cafe	Open	Product Sales		In Process
000010	Sale of commercial juicers to Delicious Ene...	New	Product Sales		Converted from Lead
000011	Sale of juicers to Cuisine Green Cafe	New		David Chubb	Converted from Lead
000012	Sale of banana jam to Allen's Bakery	New		Bill Owen	Converted from Lead
000013	Sale of jams to Milky Bay	New	Product Sales		Created
000014	Sale of commercial juicer to Italian Company	New	Product Sales		Created
000015	test	New	Product Sales		Created
000016	Sale of JUICER10	New	Product Sales		Converted from Lead

Figure: The mass-assignment of opportunities to workgroups

Lesson 2.3: Managing Events

In this lesson, you will learn how to create an activity of the *Event* type. For more information about emails and activities, see *Lesson 1.4: Managing Emails and Activities*.

Emails and Activities: Events

In Acumatica ERP, an event is a record on the *Event* (CR306030) form that represents a scheduled occurrence, such as an appointment or conference call, that is typically attended by multiple people. You can create an event by clicking **Create Event** on the **Activities** tab of the following forms, which associates the event with the entity selected on the form:

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

- *Projects* (PM301000)
- *Project Tasks* (PM302000)
- *Project Quotes* (PM304500)

An event has a date, start time, and end time. You can create an event and invite leads, contacts, employees, and persons whose data has not been entered in the system. Also, you can receive email notifications about events created by other users.

Form Layout for an Event Owner

For the owner of the event selected on the *Event* (CR306030) form, the form toolbar has the **Complete** and **Cancel** buttons, and the More menu has the equivalent commands. On the **Details** tab, the event owner can enter and change the summary settings of the event, such as date, time, priority, and location.

The owner can also select the time zone in which the start time and end time of the event are being specified. This can be the time zone relevant to the owner or the time zone of most event attendees.

By default, the system inserts the event creator's name in the **Owner** box. If the event creator selects another employee in the **Owner** box, the creator sees the form layout that is viewed by a potential attendee. (For details, see the following section.)

In the **Related Entity** box, the entity that is associated with the event is shown if the owner has created the event from the data entry form of the entity. For example, if a user was viewing a lead on the *Leads* (CR301000) form and created the event from that form, this lead will be specified in the box by default. (The user would also be the default owner of the event.) On the *Leads* form, the system adds the summary information about the event in a row of the **Activities** tab. If the owner changes the related entity of the event, the summary information about the event will be added to the **Activities** tab of the form for the new entity. The event will no longer be associated with the entity that was previously selected in this box.

On the **Attendees** tab, the event owner can list potential attendees. In the **Contact** column, the owner can select a potential attendee among the leads, contacts, and employees defined in the system. The event's owner can also add a potential attendee whose data has not been added to the system by leaving the **Contact** column empty and manually specifying the person's email address in the **Email** column. For the owner, the **Invite** and **Invite All** buttons appear on the table toolbar. The owner can click the buttons to cause the system to send notification emails to a potential attendee or all listed potential attendees. In the **Invitation** column, the status of each potential attendee's invitation is shown. The event owner can define any of the listed attendees as optional by selecting the **Optional** check box.

On the **Activities** tab, the event owner can create any emails and activities that are related to the event. For each email or activity, the system adds a row to the table with the summary information about this event or activity. The table also lists all the activities that have been created for the event, including invitations sent to potential attendees. The event owner can delete any row in the table.

Form Layout for a Potential Attendee of an Event

For a potential attendee of the event selected on the *Event* (CR306030) form, the form toolbar has the **Accept** and **Decline** buttons, and the More menu has the equivalent commands.

On the **Details** and **Attendees** tabs, all of the UI elements are unavailable for editing.

Actions That Cause the Sending of Event-Related Notification Emails

If an event owner has added potential attendees to an event on the **Attendees** tab of the *Event* (CR306030) form, the system sends notification emails to the email addresses of the potential attendees based on the actions of the event owner as follows:

- An event invitation to all potential attendees while the event is being saved for the first time: When an event's owner clicks **Save** on the form toolbar, the **Confirmation** dialog box is displayed with the following text: *At least one potential attendee has been selected. The invitations will be sent to all selected potential* *attendees.* If the event's owner clicks **Confirm**, the system sends the event invitations to all potential attendees, and the invitation status for all added potential attendees in the **Invitation** column changes from *Not invited* to *Invited*. The system also sends the invitations to all potential attendees with the *Not invited* invitation status if the event's owner clicks **Invite All** on the table toolbar of the **Attendees** tab and clicks **Confirm** in the **Confirmation** dialog box, which displayed the following text: *The invitations will be sent to only the potential attendees who have not been invited.*

- An event invitation to all potential attendees or to only newly added attendees: If a new potential attendee has been added to the previously saved event and the event's owner clicks **Save** on the form toolbar, the **Confirmation** dialog box is displayed with the following text: *At least one potential attendee has been selected. The invitations will be sent to all selected potential attendees*. If the event's owner clicks **Confirm**, the system sends the invitations either to all potential attendees with the *Not invited* invitation status or to only newly added attendees.
- An event invitation to selected attendee: If the event's owner has added any attendees to the **Attendees** tab and wants to send the invitation to one of them, the event's owner can click the row with the attendee to receive the invitation. The owner then clicks **Invite** on the table toolbar. The system sends the invitation to only the selected attendee.
- A notification to all potential attendees if the event has been rescheduled: If the event's owner changed the time, date, or both time and date of the event and clicks **Save** on the form toolbar, the **Confirmation** dialog box is displayed with the following text: *The invited potential attendees will be notified about the new start time of the event*. If the event's owner clicks **Confirm**, the system sends the invitations to all potential attendees of the event. The invitation status for all previously invited attendees is changed to *Rescheduled*. If a potential attendee has not been invited, then the system sends the invitation for the first time, and the invitation status of this attendee is changed to *Invited*.
- A notification to all potential attendees if the event has been canceled: If the event's owner deletes or cancels the event after the invitations to all potential attendees have been sent, the **Confirmation** dialog box is displayed with the following text: *The invitations that have already been sent will be canceled*. If the event's owner clicks **Confirm**, the system sends the notifications that event has been canceled to all potential attendees and deletes the event.
- A notification about the cancellation of the event to a particular potential attendee: The system sends this notification if the event's owner deletes the invited potential attendee on the **Attendees** tab, saves the changes, the start time of the event is not later than the event's end time and date, and the attendee's invitation status is *Invited*, *Accepted*, or *Rescheduled*.

Maintenance Settings that Affect Events

On the *Event Setup* (EP204070) form, a system administrator can configure the way the system sends automatic notification emails to potential attendees of an event when the event's owner performs particular actions on the *Event* (CR306030) form.

The system can be configured to use the simple notification emails that are built into the functionality of the *Event* form. Alternatively, the administrator can create notification templates and specify on the *Event Setup* form which template is used for each scenario: inviting potential attendees, rescheduling an event, and canceling an event. The notification templates provide the ability to use placeholders to personalize the emails the system generates.

By using the *Event and Task Categories* (EP204040) form, a system administrator can add, view, edit, and delete the categories to be used for events and tasks, including optionally specifying the color of highlighting to be used for each category. The event categories may help users prioritize the events. On the Events (EP4041PL) form, if highlighting has been defined for the category of a listed event, it is shown in the **Category** column.

For details about event setup, see *Managing Events* and *Notifications About Events*.

Emails and Activities: To Create an Event

The following activity will demonstrate how to create an event.

Story

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

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

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
- On the *Event Setup* (EP204070) form, the system-wide settings have been specified to prepare the system to send automatic notifications by using the built-in notification capabilities.
- On the *Employees* (EP203000) form, the following employees have been created:
  - *David Chubb*
  - *Jeffrey Vega*
- On the *Leads* (CR301000) form, the *Donna Coleman* lead has been created.

Process Overview

In this activity, you will create, reschedule, and then cancel an event on the **Activities** tab of the *Leads* (CR301000) form.

System Preparation

Before you start creating an event, 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. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *11/28/2025*. If a different date is displayed, click the Business Date menu button and select *11/28/2025*. For simplicity, in this process activity, you will create and process all documents in the system on this business date.

Step 1: Creating an Event

To create an event, do the following:

1. Open the *Donna Coleman* lead record on the *Leads* (CR301000) form.
2. Open the **Activities** tab.
3. On the table toolbar, click **Create Event**. The *Event* (CR306030) form opens in a pop-up window so that you can create an event that is related to the lead you were viewing.
4. On the **Details** tab, specify the following settings:
   - **Summary**: `Juicers for Yummy Supplies`
   - **Start Time**: *12:00 PM* on the next business day (that is, *12/01/2025*)
   - **End Time**: *1:00 PM* on the next business day (that is, *12/01/2025*)
   - **Category**: *Green*

   Notice that in the **Owner** box, *David Chubb* is inserted, and in the **Related Entity** box, *Donna Coleman* is inserted.
5. In the text area, type the message to be associated with the event, such as the following: `Let's discuss your questions about the juicers that SweetLife can offer for sale.`
6. On the form toolbar, click **Save**.

You have created the event. On the **Attendees** tab, notice that a row with your contact information has been added. (A row is always added for the event's owner.) In the **Invitation** column, the status of the invitation is *Accepted* because the owner is assumed to be attending the event. In the next step, you will invite potential attendees to the event.

Step 2: Adding Potential Attendees to the Event

To add potential attendees and invite them to the event, do the following:

1. While you are still viewing the *Juicers for Yummy Supplies* event on the *Event* (CR306030) form, add Donna Coleman on the **Attendees** tab as follows:
   a. On the table toolbar, click **Add Row**. The system adds a new row to the table.
   b. In the **Contact** column, select *Donna Coleman*. Notice that the system has inserted Donna's email address in the **Email** column. Also notice that in the **Invitation** column, the status of the invitation is *Not Invited* because you have not yet sent the invitation to the event.
2. Add Jeffrey Vega, who is an employee, as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Contact** box, select *Jeffrey Vega*. The system inserts Jeffrey's email address in the **Email** column. Notice that in the **Invitation** column, the status of the invitation is *Not Invited*.
3. Add Jim Berry, whose data has not been added to the system yet, as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Email** column, type `jim.berry@yummysupplies.example.com`.
   c. In the **Comment** column, type `Donna's colleague, a technician from Yummy Supplies`.
4. On the table toolbar, click **Invite All**.
5. In the **Confirmation** dialog box, which opens, click **OK**. The system closes the dialog box, saves your changes, and sends emails to notify the potential attendees about the event.

Notice that for the three rows that have email addressees of the potential attendees, the status of the invitation has changed to *Invited*.

6. On the **Activities** tab, notice that rows have been added with the summary information about the notification emails that have been sent to the potential attendees.

   You have invited the potential attendees to the event.

7. Close the *Event* form.
8. Sign out of the system.

Step 3: Accepting the Event

To accept the invitation to the event as a SweetLife's technician Jeffrey Vega, do the following:

1. Sign in to the system by using the *vega* username and the *123* password.
2. Open the **All Records** tab of the Events (EP4041PL) form.
3. In the row with the *Juicers for Yummy Supplies* event, notice that in the **Owner** column, *David Chubb* has been inserted, meaning that he is the event's organizer. In the **Category** column, notice that *Green* has been inserted.

   > Organizations can use these informational categories as they deem appropriate to help users prioritize events. For SweetLife, the *Green* category and highlighting in green means that the event is a usual planned work activity. The categories that can be used for events are defined on the *Event and Task Categories* (EP204040) form. The *Green* is one of the predefined categories, but others can be added to the form and selected for events.

4. In the **Summary** column, click the *Juicers for Yummy Supplies* link to open the event on the *Event* (CR306030) form. Notice that when you are viewing an event as a potential attendee, you cannot edit the settings on the **Details** tab.
5. On the **Attendees** tab, view the potential attendees of the event. In the **Invitation** column, the status of the invitation is *Invited* because an invitation has been sent, but Jeffrey Vega has not yet accepted the invitation.
6. On the form toolbar, click **Accept**. Notice that the status of the invitation has changed to *Accepted*.
7. Sign out of the system.

Step 4: Rescheduling the Event

Suppose that Donna Coleman informed you that she will be on a business trip to Phoenix, Arizona, at the time of the event. Her time zone is now Greenwich Mean Time minus seven hours. You want to select Donna's time zone for the event.

To select a new time zone for the *Juicers for Yummy Supplies* event and change the event's time, do the following:

1. Sign in to the system by using the *chubb* username and the *123* password.
2. Open the **All Records** tab of the Events (EP4041PL) form.
3. Select the row that has *Juicers for Yummy Supplies* in the **Summary** column.
4. In the side panel, click **Event**. The event opens in the side panel on the *Event* (CR306030) form.
5. On the **Details** tab, in the **Time Zone** box, select *(GMT-07:00) Arizona*. Notice that in the **Start Time** box, *12:00 PM* remains, and in the **End Time** box, *1:00 PM* remains. However, the actual start and end times of the event have been changed, because they are the same times in a different time zone.
6. On the form toolbar, click **Save**.
7. In the **Confirmation** dialog box, which opens, click **OK**. The system closes the dialog box and sends the potential attendees rescheduling emails, which notify them about the new time of the event.

8. On the **Activities** tab, notice that rows have been added (as shown in the following screenshot) with the summary information about the emails that notify the potential attendees about the new time of the event.

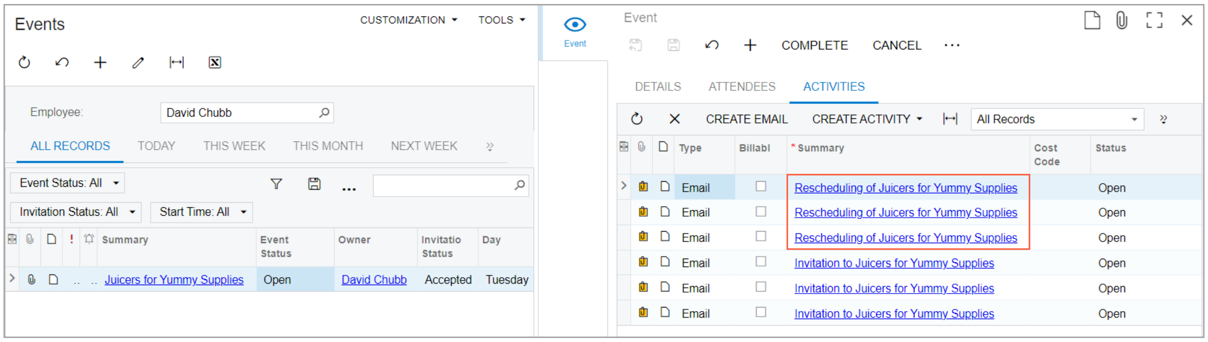


Figure: Notifications to the potential attendees about the rescheduled event

9. Close the side panel with the *Event* form opened.
10. On the form toolbar of the Events (EP4041PL) form, click **Refresh**. Notice that in the **Start Time** column for the event, the time has changed to *2:00 PM* and in the **End Time** column, the time has changed to *3:00 PM*. The times on this form are shown in the default time zone for the user as specified on the *User Profile* (SM203010) form or, if no time zone is specified for the user, the default time zone of the system as specified on the *Site Preferences* (SM200505) form. Because no default time zone is specified for David Chubb, the time is shown in the system time zone, which is Greenwich Mean Time minus five hours.

You have rescheduled the event and notified the potential attendees about the new time of the event.

Step 5: Canceling the Event

Suppose that Donna Coleman cannot participate in the conference call because of a change in her travel plans and would like you to cancel the event. Donna will come to SweetLife's office early next week, but the exact date is not defined yet.

To cancel the *Juicers for Yummy Supplies* event, do the following:

1. On the **All Records** tab of the Events (EP4041PL) form, click the *Juicers for Yummy Supplies* link in the **Summary** column to open the event on the *Event* (CR306030) form.
2. On the form toolbar, click **Cancel**.
3. In the **Confirmation** dialog box, which opens, click **OK**. The system closes the dialog box and sends emails to notify the potential attendees about the cancellation of the event.
4. On the **Activities** tab, notice that rows have been added with the summary information about the emails that notify the potential attendees about the cancellation of the event.
5. On the **Attendees** tab, in the **Invitation** column, notice that the status of the invitations to potential attendees has changed to *Canceled* because you have canceled the event (see the following screenshot).

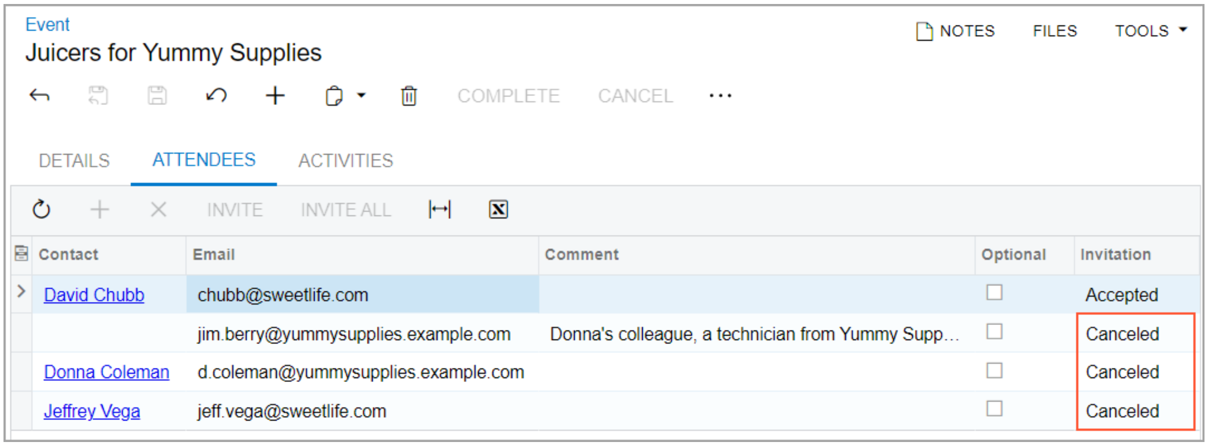


Figure: The cancellation of the event

Lesson 2.4: Managing Opportunities

In this lesson, you will learn how to manage opportunities and create sales quotes, sales orders, and invoices based on opportunities.

Opportunity Management: General Information

Acumatica ERP helps you manage your opportunities for deals by using the workflow of opportunity management. With this workflow, you can estimate revenue by using opportunity stages and create documents associated with opportunities, such as sales quotes, sales orders, service orders, and invoices.

Learning Objectives

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

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

Applicable Scenarios

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

- You sell products or services that require a continuous sales cycle, which may include product demos and the preparation of sales quotes, and you need to use the workflow of opportunity management.
- You need to create an opportunity-based sales order and send it to your customer.

Opportunity Management in Acumatica ERP

In Acumatica ERP, you can manage opportunities, including those for products or services that require a long sales cycle. During the sales cycle, an opportunity progresses through stages. You can define the needed opportunity stages to fit your company's business processes. Based on the defined opportunity stages, you specify the current stage of an opportunity in the **Stage** box of the Summary area on the *Opportunities* (CR304000) form. For details, see *Opportunity Management: Opportunity Stages*.

You can customize your opportunity management workflow so that an opportunity can be moved to a particular stage based on particular conditions. For example, an opportunity can be advanced to the *Qualification* stage only if the customer's budget for the opportunity has been specified in the system.

Depending on your company's sales processes, you can manage an opportunity by doing the following:

1. Creating an opportunity through lead conversion or manually: For details, see *Qualifying Leads (Sales)* and *Creating Opportunities*. You use the *Opportunities* (CR304000) form for tracking the settings and details related to the opportunity.

   During the creation of the opportunity or at any later time, you can enter the list of products and services that your company is offering to the prospect or customer, including the prices for these products and services, on the **Details** tab of this form. You can apply discounts and calculate fees and taxes. For details, see *Opportunity Management: Products and Services in an Opportunity*.

2. Creating activities associated with an opportunity: In Acumatica ERP, you can track the prospect- or customer-related activities you perform to help your prospect or customer evaluate your products or services and make a decision to buy them. These activities may include creating emails, making phone calls, conducting meetings, or creating product demos to help your customer make an informed buying decision. You can create and track these activities by using the **Activities** tab of the *Opportunities* form, as described in *Managing Emails and Activities*. On this tab, activities related to an opportunity are listed, along with activities related to the sales quotes associated with the opportunity.

3. Creating a sales quote: From the *Opportunities* form, you can create a sales quote based on the opportunity, which causes the system to copy the relevant settings, including the products and services on the **Details** tab, to the *Sales Quotes* (CR304500) form. You can then finish preparing the sales quote and send it to your prospect or customer, as described in *Opportunity Management: Sales Quotes*. If your company's sales processes include the approval of sales quotes, you can approve the needed sales quote by using an approval map, as described in *Approval Configuration: Approval Maps*.

   Then you discuss the offer with the prospect or the customer until it has been agreed upon or declined. If you need to create multiple sales quotes, you can mark one of them as a primary quote; the system uses the primary sales quote as the source of particular settings of the opportunity, such as the list of products, the currency and currency rate, the tax details, and the discount details.

4. Closing the opportunity: The opportunity can be closed as won or lost. For details, see *Opportunity Management: To Create an Opportunity-Based Sales Order*.

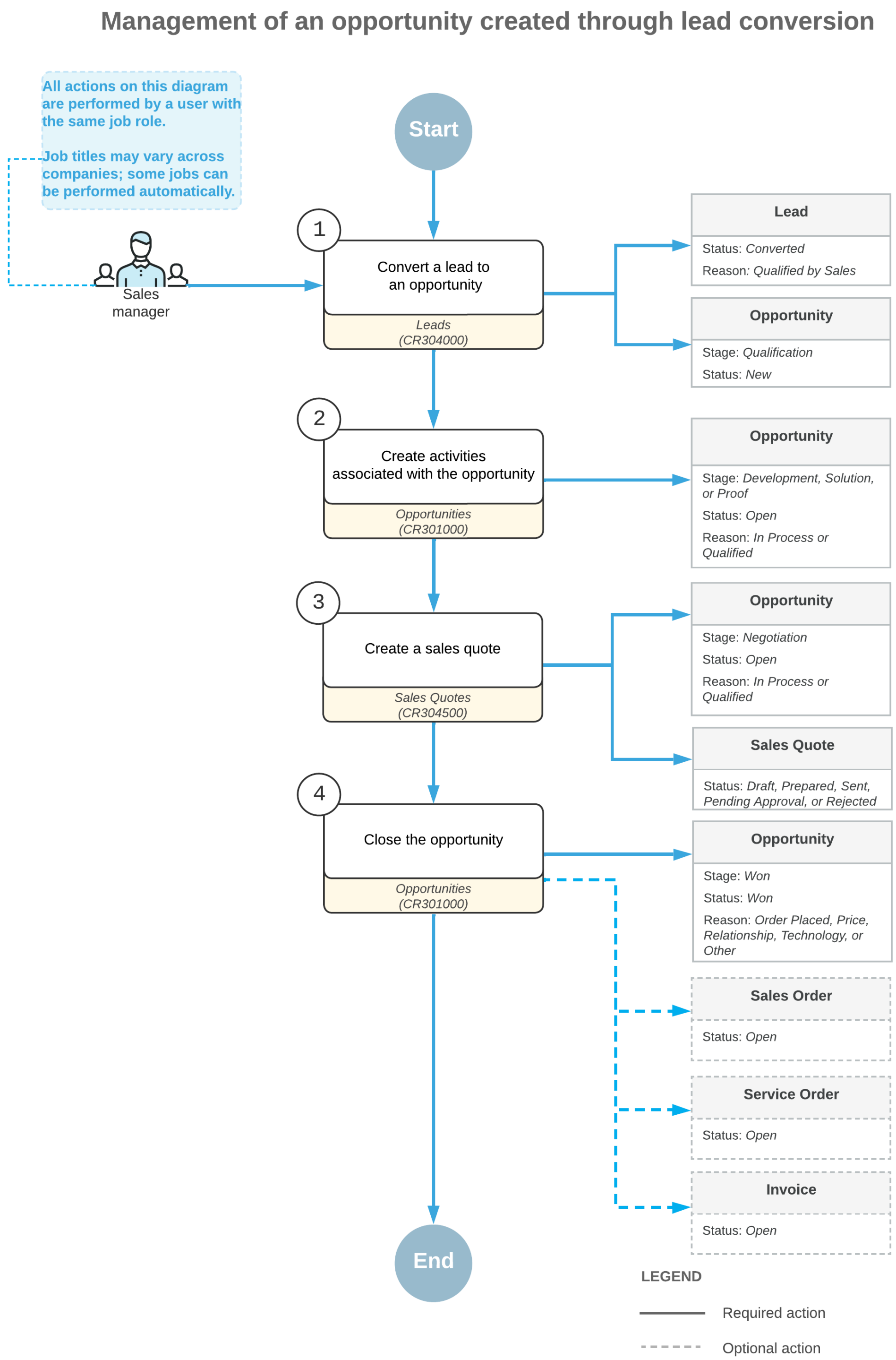
5. Creating a sales order based on the opportunity (optional): For details, see *Opportunity Management: Sales Orders*.

6. Creating a service order based on the opportunity (optional): For details, see *Opportunity-Related Service Orders: General Information*.

7. Creating an invoice based on the opportunity (optional): For details, see *Opportunity Management: Invoices*.

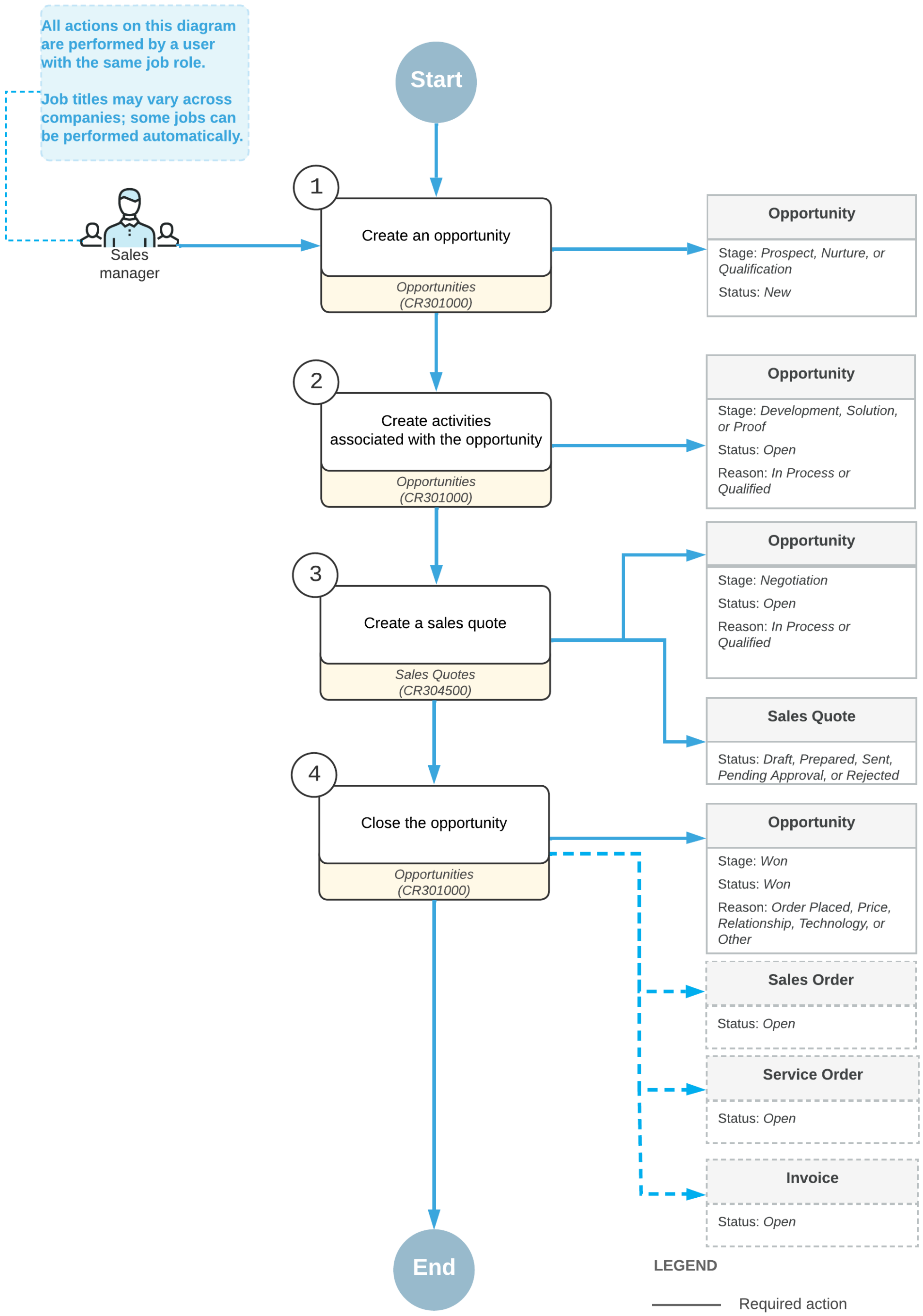
Workflow of Opportunity Management

The following diagram illustrates the management of an opportunity that has been created through lead conversion.



The following diagram illustrates the management of a manually created opportunity.

Management of a manually created opportunity



Template-Based Emails Related to Opportunities

A system administrator can configure Acumatica ERP to automatically send template-based emails related to opportunities. For example, the administrator might set up the system to send an email to the owner of an opportunity about the expiration of this opportunity. For details, see *Business Events: Subscribers*.

Opportunity Management: Opportunity Stages

When an opportunity is processed by a salesperson, it progresses through various stages. At any particular stage, there is a certain probability that the sale can be successfully closed. The assignment of stages to opportunities gives you the ability to estimate future sales revenue at any time. The accuracy of revenue estimation depends heavily on the correct identification of the opportunity stage and on the accuracy of defining the specified probability.

An implementation consultant or system administrator uses the **Stages** tab of the *Opportunity Classes* (CR209000) form to define opportunity stages and their probabilities in your organization. The full list of opportunity stages can be available for selection to all opportunity classes, but every class may have its own set of active stages. For each opportunity class, at least one stage should be active. For details, see *Defining Opportunity Classes*.

You can specify the current opportunity stage of an opportunity in either of the following ways:

- By selecting an option in the **Stage** box of the Summary area on the *Opportunities* (CR304000) form.
- By clicking commands on the More menu and selecting an option in the **Stage** box of the **Details** dialog box, which opens.

The system offers the following predefined list of opportunity stages:

- *Prospect*: The contact or business account associated with the opportunity is a known prospect, but it is not clear whether this prospect is interested in the offered products or services.
- *Nurture*: A salesperson is collecting information about the prospect or customer's interest in products and services; the salesperson may also be negotiating with the prospect or customer. This stage may be useful if your company decides not to use leads.
- *Qualification*: A salesperson is determining the prospect or customer's interest in purchasing particular products or services.
- *Development*: A salesperson is clarifying the prospect or customer's requirements for products or services, as well as the budget, delivery schedule, and project scope (if applicable).
- *Solution*: A salesperson is negotiating with the prospect or customer about the content of the solution (proposal) and the set of products or services that the prospect or customer wants to buy. The salesperson is creating product demonstrations or other evaluation tools, and the prospect or customer is evaluating the products or services.
- *Proof*: A salesperson has developed a solution (that is, a proposal), and the prospect or customer is evaluating the solution. The salesperson may select a primary sales quote at this stage.
- *Negotiation*: A salesperson and the prospect or customer are negotiating the prices, discounts, and terms of the proposed deal.
- *Won*: The prospect or customer has accepted the proposal and is ready to sign the contract or place an order (or has already done this). Some companies prefer to advance the opportunity to this stage only after the invoice has been issued, or even after a payment has been received.

Depending on your company’s sales processes, any of these stages may be skipped as needed, or new stages can be created. To make a stage inactive, you clear the **Active** check box for the stage on the **Stages** tab of the *Opportunity Classes* form.

Opportunity Management: Products and Services in an Opportunity

On the **Details** tab of the *Opportunities* (CR304000) form, you can add to the selected opportunity the products or services that you want to sell to the prospect or customer. Based on these products or services, you can create any of the following documents: a sales quote, a sales order, a service order, and an invoice.

You can add stock items or non-stock items to an opportunity by selecting their identifiers in the **Inventory ID** column if the *Inventory* feature has been enabled on the *Enable/Disable Features* (CS100000) form and inventory item records of the products and services have been created on the *Stock Items* (IN202500) or the *Non-Stock Items* (IN202000) form.

For any products or services that are not defined in the system, you can still add lines to the **Details** tab of the *Opportunities* form. You can leave the **Inventory ID** column empty, specify the names of the items in the **Description** column, and specify or select manually the rest of the settings—such as quantity, prices, discounts, or warehouse.

The tax details for the products and services (with an inventory ID or without an inventory ID) specified for the opportunity are inserted by the system on the **Taxes** tab of the *Opportunities* form if taxes have been configured in your system, as described in *Taxes*.

You can specify the information about discounts in the opportunity on the **Discounts** tab if the *Customer Discounts* feature is enabled on the *Enable/Disable Features* form. You can add a discount for a customer or a group of customers (which the system will automatically apply), apply a promo code for a discount, or apply a manual discount. The system will apply automatic group and document discounts even if the value in the **Inventory ID** column for a line on the **Details** tab for the opportunity on the *Opportunities* form is empty.

Opportunity Management: Sales Quotes

In Acumatica ERP, you can use sales quotes to present an offer based on an opportunity to a prospect or customer; the sales quote includes a list of products and services offered at specific prices and with specific discounts, taxes, and other terms.

Creation of Sales Quotes

A sales quote is a document you create in Acumatica ERP on the *Sales Quotes* (CR304500) form. You can create sales quotes in the system if the *Sales Quotes* feature is enabled on the *Enable/Disable Features* (CS100000) form.

You can create any number of sales quotes for an opportunity as you negotiate the deal with the prospect or customer. A sales quote can be printed or emailed to the specified customer for review. A sales quote can be selected as primary for an opportunity. When the customer accepts an offer, at least one sales quote must be selected as the primary one.

You can start creating a sales quote in any of the following ways:

- By clicking **Create Quote** on the form toolbar of the *Opportunities* (CR304000) form while viewing the opportunity the quote will be based on. This opens the **Create Quote** dialog box, where you can specify basic settings. When you click **Create & Review**, the system closes the dialog box and opens the *Sales Quotes* form with applicable settings filled in, so that you can view and edit the created sales quote.
- By clicking **Create Quote** on the table toolbar of the **Quotes** tab on the *Opportunities* form while viewing the opportunity the quote will be based on. This opens the **Create Quote** dialog box, where you can specify the basic settings of the quote.
- By clicking **New Record** on the form toolbar of the Sales Quotes (CR3045PL) form. In this case, you need to enter the settings of the sales quote manually.

- By clicking **Add New Record** on the form toolbar of the *Sales Quotes* form. In this case, you also need to enter the settings of the sales quote manually.
- By selecting an existing quote and then clicking **Copy Quote**, which is available on the table toolbar of the **Quotes** tab on the *Opportunities* form and on the More menu or on the form toolbar of the *Sales Quotes* form. This command causes the system to open the **Copy Quote** dialog box, where you can specify the needed settings for a new quote. When you click **OK** in the dialog box, the system copies the settings of the selected quote to a new one.

If you create a sales quote based on an opportunity or another sales quote, the system copies the settings specified on the **Contact**, **Financial**, **Shipping**, and **Taxes** tabs of the *Opportunities* (CR304000) form and inserts them to a new sales quote that is generated on the *Sales Quotes* form.

If any automatic group and document discounts has been specified for lines on the **Details** tab on the *Sales Quotes* form, the system will apply these discounts even if the value in the **Inventory ID** column for a line is empty.

Primary Sales Quotes

When a sales quote is created for an opportunity, the system sets this sales quote as primary by selecting the **Primary** check box in the Summary area on the *Sales Quotes* (CR304500) form and in the row that has the settings of the sales quote on the **Quotes** tab of the *Opportunities* (CR304000) form.

If multiple sales quotes are created for an opportunity, one of the sales quotes must be set as the primary, which you can do either during the creation of a quote or by clicking **Set as Primary** on the More menu of the *Sales Quotes* form or on the table toolbar of the **Quotes** tab of the *Opportunities* form.

An opportunity uses the primary sales quote as the source of various settings on the *Opportunities* form, such as the list of products and services, the currency and the currency rate, the location, billing address, billing information, contact information, tax details, and discount details. If you change the sales quote set as the primary sales quote for the opportunity, these settings are changed for the opportunity to those of the new primary sales quote.

If a sales quote is the primary one for the opportunity and its status has changed from *Draft* to any other status, the **Business Account** box is unavailable for editing both for the primary sales quote on the *Sales Quotes* form and for the opportunity on the *Opportunities* form. If the status of a non-primary sales quote has changed from *Draft* to any other status, the **Business Account** box is unavailable for editing only for this sales quote.

Sales Quote Activities

On the **Activities** tab of the *Sales Quotes* (CR304500) form, you can create activities associated with the selected sales quote. On the **Activities** tab of the *Opportunities* (CR304000) form, activities related to the selected opportunity are listed, along with activities related to the sales quotes associated with the opportunity.

Processing of a Sales Quote Through Statuses

In Acumatica ERP, as a sales quote is being processed by a salesperson, it progresses through various statuses. The current status of the sales quote is displayed in the **Status** box in the Summary area of the *Sales Quotes* (CR304500) form. Because the system updates the status of the sales quote during processing, the **Status** box is unavailable for editing.

A sales quote can have one of the following statuses:

- *Draft*: The sales quote is being prepared and can be edited. This is the default status of a new sales quote.
- *Sent*: The quote has been emailed to the customer—that is, an email activity with the quote attached to it has been created and sent to the customer contact.

  > The *Sent* status does not guarantee that the sales quote has been delivered to the recipient or has been read.

- *Pending Approval*: The sales quote requires an approval or multiple approvals, which are determined based on the approval map assigned to sales quotes.
- *Approved*: The sales quote is approved within the company.
- *Rejected*: The sales quote has been rejected by an approver within the company.
- *Accepted*: The sales quote has been accepted by the customer.
- *Converted*: The sales quote has been converted to a sales order or invoice, and no further work on the quote is planned.
- *Declined*: The customer has rejected the offer presented in the sales quote.

You can also see the statuses of a particular opportunity's sales quotes on the **Quotes** tab (**Status** column) of the *Opportunities* (CR304000) form.

Approval of Sales Quotes

Approval of sales quotes can be set up in the system if the *Approval Workflow* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Sales quotes require approval if an approval map for sales quotes has been specified in the **Approval Map** box of the **General** tab (**Quote Approval Settings** section) of the *Customer Management Preferences* (CR101000) form.

With this configuration performed, you can submit a sales quote with the *Draft* status for approval by clicking **Request Approval** on the form toolbar of the *Sales Quotes* (CR304500) form. When a sales quote has been submitted for approval, the **Approve** and **Reject** buttons are displayed on the form toolbar. The information on approvals of a sales quote is added to the **Approvals** tab of the form.

The following settings of a sales quote that has the *Pending Approval* status cannot be modified:

- The business account, location, and settings related to amounts in the Summary area
- The settings on the **Details** tab
- The settings on the **Shipping** tab
- The settings on the **Taxes** tab
- The settings on the **Discounts** tab

An assigned approver can approve or reject the sales quote by clicking **Approve** or **Reject** on the form toolbar of the *Sales Quotes* form. After a sales quote has been approved, it can be sent to the customer.

Emailing of a Sales Quote

You can send a sales quote to a contact of the customer or prospective customer for review by clicking **Send** on the More menu of the *Sales Quotes* (CR304500) form. The system creates an activity of the *Email* type, attaches the *Sales Quote* (CR604500) report (which is a printable version of the sales quote) to the email, sends the email, and changes the status of the quote to *Sent*. A row with the details of the email is added on the **Activities** tab of the *Sales Quotes* form.

The email is generated automatically in accordance with the mailing settings specified for customer relationship management (CRM) in Acumatica ERP, as described in *Emails and Activities: Emails*.

Location-Related Settings of a Sales Quote

The location-related settings of a sales quote are specified in the **Ship-To Address** and **Ship-To Info** sections of the **Shipping** tab of the *Sales Quotes* (CR304500) form. When you create the sales quote, the system inserts the location-related settings, which it copies from the same sections of the **Shipping** tab of the *Opportunities* (CR304000) form for the associated opportunity.

On the **Shipping** tab of the *Sales Quotes* form, the **Override** check boxes in the **Ship-To Address** and **Ship-To Info** sections are cleared, meaning that the location-related settings are synchronized between the sales quote and the opportunity. However, you can update these settings with new location-related settings on the *Sales Quotes* form in any of the following ways:

- By selecting the **Override** check box in the **Ship-To Address** or **Ship-To Info** section (or both sections) and changing the settings manually.
- By specifying a different business account in the **Business Account** box or another location of the business account in the **Location** box of the Summary area.

  In this case, the system inserts the location-related settings specified for the new business account or location and selects the **Override** check box.

Opportunities with Quotes for Multiple Business Accounts

If an opportunity has multiple sales quotes, the business accounts specified for these sales quotes on the *Sales Quotes* (CR304500) form can differ from the business account specified for the opportunity on the *Opportunities* (CR304000) form.

A sales quote can have a different business account than that of the associated opportunity only if the following conditions are met:

- The quote (whether it is primary or non-primary) has the *Draft* status.
- The opportunity associated with the sales quote has the *New* or *Open* status.

In an opportunity that has sales quotes for different prospects or customers, on the **Quotes** tab of the *Opportunities* form, you can track the business account, location, and contact of each sales quote in the following columns: **Business Account**, **Location**, and **Contact**.

If the *Row-Level Security* feature is enabled on the *Enable/Disable Features* (CS100000) form, the access to a business account selected in an opportunity may be restricted for your current user account. In this case, access to any sales quotes associated with this opportunity will also be restricted. This applies even if the business account of the sales quote is different from the one in the opportunity, or if no business account is selected in the sales quote. You can only see these sales quotes on the **Quotes** and **Relations** tabs of the *Opportunities* form for the associated opportunity.

Relations Between a Sales Quote and Its Associated Records

As you work with a sales quote in Acumatica ERP, you can track the records associated with the quote on the **Relations** tab of the *Sales Quotes* (CR304500) form. For details, see *Managing Relations*.

Opportunity Management: Sales Orders

The **Details** tab of the *Opportunities* (CR304000) form may include detail lines that represent products or services for items and services to be included in the potential sales. A detail line may contain a stock item or a non-stock item defined in Acumatica ERP, or it may contain no inventory items at all. (That is, the **Inventory ID** column may be left empty for the line, which gives you the ability to manually enter the line description in the **Description** column and other values—such as the quantity, price, discount, or warehouse—in the respective columns.) For details, see *Opportunity Management: Products and Services in an Opportunity*.

For the opportunity, you can create a sales order if the *Inventory and Order Management* group of features is enabled on the *Enable/Disable Features* (CS100000) form and a business account has been selected for the opportunity. If the selected business account has the *Business Account* type (that is, the business account is a prospective customer that has not been extended to be a customer), you can extend it on the fly during sales order creation by using the **Create Sales Order** dialog box.

This sales order will include only the detail lines for which the **Inventory ID** column is filled in. If the opportunity includes no detail lines or only detail lines with the **Inventory ID** column left empty, you cannot create a sales order based on that opportunity.

You can start creating a sales order based on an opportunity in either of the following ways:

- By clicking **Create Sales Order** on the More menu of the *Opportunities* form
- By clicking **Convert to Order** on the More menu of the *Sales Quotes* (CR304500) form

Clicking either of these commands causes the system to open the **Create Sales Order** dialog box, where you can specify basic settings, including which sales order type should be used, whether prices and discounts should be recalculated, and how the system creates the customer based on the selected business account.

> If the products, services, and total amount of a deal are still being discussed, and the **Manual Amount** check box is selected in the Summary area of the *Opportunities* form for an opportunity, to create a sales order from an opportunity with this check box selected, you select the **Create a Sales Order Regardless of the Specified Manual Amount** check box of the **Create Sales Order** dialog box.

When you click **Create & Review**, the system performs the following actions:

- Verifying that the user has filled in all the required elements in the dialog box
- Closing the dialog box
- Creating a new customer based on the existing business account
- Creating a new sales order for the customer and opening it on the *Sales Orders* (SO301000) form with the applicable settings filled in

For more details about the creation of a sales order from a sales quote, see the *Creation of a Sales Order from a Sales Quote* section of this topic.

Creation of a Sales Order from an Opportunity

When an opportunity-based sales order is created, the values of the following settings are copied from the opportunity on the *Opportunities* (CR304000) form to the sales order on the *Sales Orders* (SO301000) form:

- The settings in the **Bill-To Address** section (including the **Override** check box) from the **Financial** tab of the *Opportunities* form to the **Addresses** tab of the *Sales Orders* form
- The settings in the **Bill-To Info** section (including the **Override** check box) from the **Financial** tab of the *Opportunities* form to the **Bill-To Contact** section on the **Addressees** tab of the *Sales Orders* form
- The **Credit Terms** box on the **Financial** tab of the *Opportunities* form to the **Terms** box on the **Financial** tab of the *Sales Orders* form
- The settings in the **Tax Settings** section from the **Shipping** tab of the *Opportunities* form to the **Financial Information** section on the **Financial** tab of the *Sales Orders* form
- The settings in the **Shipping Instructions** section from the **Shipping** tab of the *Opportunities* form to the **Delivery Settings** section on the **Shipping** tab of the *Sales Orders* form
- The settings in the **Ship-To Address** and **Ship-To Info** sections on the **Shipping** tab of the *Opportunities* form to the **Ship-To Contact** and **Ship-To Address** sections on the **Addresses** tab of the *Sales Orders* form

The system lists the sales orders created from an opportunity on the **Relations** tab of the *Opportunities* form. An opportunity can have any number of sales orders. A sales order is assigned the *Derivative* role in the **Role** column of this tab, meaning that the sales order has been created based on the opportunity. Also, the opportunity is listed on the **Relations** tab of the *Sales Orders* form and is assigned the *Source* role. For details, see *Relations: Sales Orders, Opportunities, and Other Entities*.

For details, see *Opportunity Management: To Create an Opportunity-Based Sales Order*.

Creation of a Sales Order from a Sales Quote

You can start creating a sales order from a sales quote by clicking **Convert to Order** on the More menu of the *Sales Quotes* (CR304500) form. If the business account selected for the sales quote has the *Business Account* type (that is, the business account is a prospective customer that has not been extended to be a customer), you can extend it on the fly during sales order creation by using the **Create Sales Order** dialog box. When a sales order has been created and saved, the system changes the status of the sales quote to *Converted*.

A sales order can be created from both a primary quote for an opportunity and a non-primary one. An opportunity can have multiple sales orders that have been created based on non-primary quotes. The system lists the sales orders on the **Relations** tab of the *Sales Quotes* (CR304500) and *Opportunities* (CR304000) forms for each sales quote and opportunity, respectively; it also lists the opportunity and the sales quote on this tab of the *Sales Orders* (SO301000) form. For details, see *Relations: Sales Orders, Opportunities, and Other Entities*.

Opportunity Management: Invoices

The **Details** tab of the *Opportunities* (CR304000) form may include detail lines that represent products or services for potential sales. A detail line may contain a stock item or a non-stock item defined in Acumatica ERP, or it may contain no inventory item at all. For details, see *Opportunity Management: Products and Services in an Opportunity*.

For the opportunity, you can create an AR invoice if a business account of the *Customer* type has been selected for the opportunity. This invoice will include only the detail lines with non-stock items that have been defined in the system. You cannot create an invoice based on that opportunity if the opportunity includes no detail lines, only detail lines with the **Inventory ID** column left empty, or only detail lines with stock items.

You can start creating an invoice based on an opportunity in either of the following ways:

- By clicking **Create Invoice** on the More menu of the *Opportunities* form
- By clicking **Convert to Invoice** on the More menu of the *Sales Quotes* (CR304500) form

Clicking either of these commands causes the system to open the **Create Invoice** dialog box, where you can specify basic settings, including whether prices and discounts should be recalculated.

> If the products, services, and total amount of a deal are still being discussed, and the **Manual Amount** check box is selected in the Summary area of the *Opportunities* form for an opportunity, to create an invoice from an opportunity with this check box selected, you can select the **Create an Invoice for the Specified Manual Amount** check box of the **Create Invoice** dialog box.

When you click **Create**, the system closes the dialog box and opens the *Invoices and Memos* (AR301000) form with the applicable settings filled in, so that you can create an invoice associated with the opportunity or the sales quote. For more details about the creation of an invoice from a sales quote, see *Opportunity Management: Sales Quotes*.

Creation of an Invoice from an Opportunity

When an opportunity-based invoice is created, the values of the following settings are copied from the opportunity on the *Opportunities* (CR304000) form to the invoice on the *Invoices and Memos* (AR301000) form:

- The settings in the **Bill-To Address** section (including the **Override** check box) from the **Financial** tab of the *Opportunities* form to the **Addresses** tab of the *Invoices and Memos* form
- The settings in the **Bill-To Info** section (including the **Override** check box) from the **Financial** tab of the *Opportunities* form to the **Bill-To Contact** section on the **Addressees** tab of the *Invoices and Memos* form
- The **Credit Terms** box on the **Financial** tab of the *Opportunities* form to the **Terms** box in the Summary area of the *Invoices and Memos* form

- The settings in the **Tax Settings** section from the **Shipping** tab of the *Opportunities* form to the **Tax Info** section on the **Financial** tab of the *Invoices and Memos* form
- The settings in the **Ship-To Address** and **Ship-To Info** sections from the **Shipping** tab of the *Opportunities* form to the **Ship-To Contact** and **Ship-To Address** sections on the **Addresses** tab of the *Invoices and Memos* form

The system lists the invoices created from an opportunity on the **Relations** tab of the *Opportunities* form. An opportunity can have any number of invoices. An invoice is assigned the *Derivative* role in the **Role** column of this tab, meaning that the invoice has been created based on the opportunity. For details, see *Managing Relations*.

Creation of an Invoice from a Sales Quote

You can start creating an invoice from a sales quote by clicking **Convert to Invoice** on the More menu of the *Sales Quotes* (CR304500) form.

An invoice can be created from both a primary quote for an opportunity and a non-primary one. An opportunity can have multiple invoices that are created based on non-primary quotes. The system lists the created invoices on the **Relations** tab of the *Sales Quotes* (CR304500) and *Opportunities* (CR304000) forms. For details, see *Managing Relations*.

Opportunity Management: To Add Products to an Opportunity

The following activity demonstrates how to add products to an opportunity in Acumatica ERP.

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- On the *Opportunities* (CR304000) form, the *Sale of commercial juicers to Delicious Energy* opportunity has been created.
- On the *Business Accounts* (CR303000) form, the *DELIENERGY* business account has been created.
- On the *Stock Items* (IN202500) form, the *JUICER15* and *JUICER20C* stock items, which hold the settings of two different commercial juicers, have been created.

Process Overview

In this activity, you will add products to the existing opportunity for the *DELIENERGY* business account on the **Details** tab of the *Opportunities* (CR304000) form.

System Preparation

Before you start adding products to an opportunity, 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: Adding Products to an Opportunity

You will update the existing opportunity by adding five *JUICER15* commercial juicers and three *JUICER20C* commercial citrus juicers, and then apply the discount to the deal. To add these products to the opportunity in the needed quantities, do the following:

1. Open the *Sale of commercial juicers to Delicious Energy* opportunity on the *Opportunities* (CR304000) form.
2. On the **Details** tab, add products to the opportunity as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Inventory ID** column of the added row, select *JUICER15*.

      Notice that the system has filled in the settings for the *JUICER15* inventory item, including the **Tax Category** and **Discount, %** settings.
   c. In the **Quantity** column, type `5`.
   d. In the **Discount, %** column, type `5`.

      A 5% discount is applied to this detail line.

      > If you want to specify a discount amount to be applied to the total amount of all products and services included in the opportunity, type the discount amount in the **Document Discount** box.
   e. On the form toolbar, click **Save**.
   f. On the table toolbar, click **Add Row**.
   g. In the **Inventory ID** column of the added row, select *JUICER20C*.
   h. In the **Quantity** column, type `3`.
3. On the form toolbar, click **Save**.

You have added the products and the applicable discounts and quantities to the opportunity. You can see the total amount for the products in the **Detail Total** box in the Summary area of the *Opportunities* form. If you create a sales quote for the opportunity, the system will add these products to the sales quote.

Opportunity Management: To Create a Sales Quote

The following activity demonstrates how to create a sales quote in Acumatica ERP.

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- On the *Opportunities* (CR304000) form, the *Sale of juicers to Cuisine Green Cafe* opportunity has been created.

- On the *Business Accounts* (CR303000) form, the *GREENCAFE* business account record has been created and extended as a customer, with its settings specified on the *Customers* (AR303000) form.
- On the *Stock Items* (IN202500) form, the *JUICER10* and *JUICER10C* stock items, which hold the settings of two different professional series juicers, have been created.
- On the **Details** tab of the *Opportunities* form, three *JUICER10* and two *JUICER10C* stock items have been added to the *Sale of juicers to Cuisine Green Cafe* opportunity.

Process Overview

In this activity, you will do the following:

1. Create a sales quote on the *Opportunities* (CR304000) form.
2. Send the sales quote to the customer by email on the *Email Activity* (CR306015) form.
3. Create another sales quote that contains another set of products and discounts on the *Sales Quotes* (CR304500) form, and set this sales quote as the primary sales quote, meaning that it contains the agreed-upon terms of the deal.

System Preparation

Before you start creating a sales quote for an opportunity, 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 Sales Quote

To create a sales quote for the *Sale of juicers to Cuisine Green Cafe* opportunity, do the following:

1. Open the *Sale of juicers to Cuisine Green Cafe* opportunity on the *Opportunities* (CR304000) form.
2. On the **Details** tab, notice that the *JUICER10* and *JUICER10C* stock items have been added, to represent the juicers in the proposed deal.
3. On the form toolbar, click **Create Quote**.
4. In the **Create Quote** dialog box, which opens, do the following:
    a. In the **Quote Type** box, make sure that *Sales Quote* is selected.
    b. Click **Create & Review**.

       The system closes the dialog box and opens the new sales quote with the *Draft* status on the *Sales Quotes* (CR304500) form. On the **Details** tab, the system has added lines for the *JUICER10* and *JUICER10C* stock items, which it has copied from the opportunity.
5. On the **Details** tab, do the following:
    a. In the line with the *JUICER10* inventory item, in the **Discount, %** box, type `5`.
    b. In the line with the *JUICER10C* inventory item, in the **Discount, %** box, type `5`.
6. On the form toolbar, click **Save**.

You have created a sales quote. Notice that the system applied the discounts that you have entered and filled in the **Discount Amount** column for each product on the **Details** tab of the *Sales Quotes* form. The system has also added a row with the sales quote to the table on the **Quotes** tab of the *Opportunities* form.

Step 2: Sending the Sales Quote to the Customer by Email

To send a sales quote to the customer by email, do the following:

1. While you are still viewing the sales quote on the *Sales Quotes* (CR304500) form, on the More menu, under **Other**, click **Print Quote**.

   The system opens the *Sales Quote* (CR604500) report, which displays a ready-to-print version of the sales quote.

2. On the report toolbar of the report, click **Send**.
3. On the *Email Activity* (CR306015) form, which opens in a pop-up window, enter a message for the customer, and on the form toolbar, click **Send**. This creates an email activity associated with the sales quote on the **Activities** tab of the *Sales Quotes* form. A PDF file with the sales quote is attached to the email, which is added to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically to the customer email address from the default system email account the next time this schedule is executed.

   > If the mailing settings have been specified and a template of the email has been created in the system, you can skip printing the sales quote and instead click **Send** on the More menu of the *Sales Quotes* form. The system creates an email activity associated with the sales quote, adds the email on the **Activities** tab of the form, and sends it to the customer email address from the default system email account.

Step 3: Copying a Sales Quote and Making the Sales Quote Primary

Suppose that your customer Roland Mercier has contacted you and informed you that the Cuisine Green Cafe would like to buy five *JUICER10C* juicers instead of two, but only if you give the company a 15 percent discount for the whole order. You have agreed to give the required discount. You need to create another sales quote and make this quote the primary one.

To copy a sales quote and define this sales quote as primary, do the following:

1. Open the *Sale of juicers to Cuisine Green Cafe* sales quote on the *Sales Quotes* (CR304500) form.
2. On the More menu, under **Other**, click **Copy Quote**.
3. In the **Copy Quote** dialog box, which opens, do the following:
   a. In the **Description** box, correct the description as follows: `2. Sale of juicers to Cuisine Green Cafe`.
   b. Click **OK**. The system closes the dialog box and opens the copied sales quote on the *Sales Quotes* form.
   c. On the **Details** tab, do the following:
      a. In the row with the *JUICER10* inventory item, in the **Discount, %** column, type `15`.
      b. In the row with the *JUICER10C* inventory item, do the following:
         a. In the **Quantity** box, type `5`. This is the new quantity requested by the customer.
         b. In the **Discount, %** box, type `15`.
4. On the form toolbar, click **Save**.
5. On the More menu, under **Other**, click **Set as Primary**.

You have created a sales quote and made it the primary sales quote, as shown in the following screenshot. Now you can send the new sales quote to the customer.

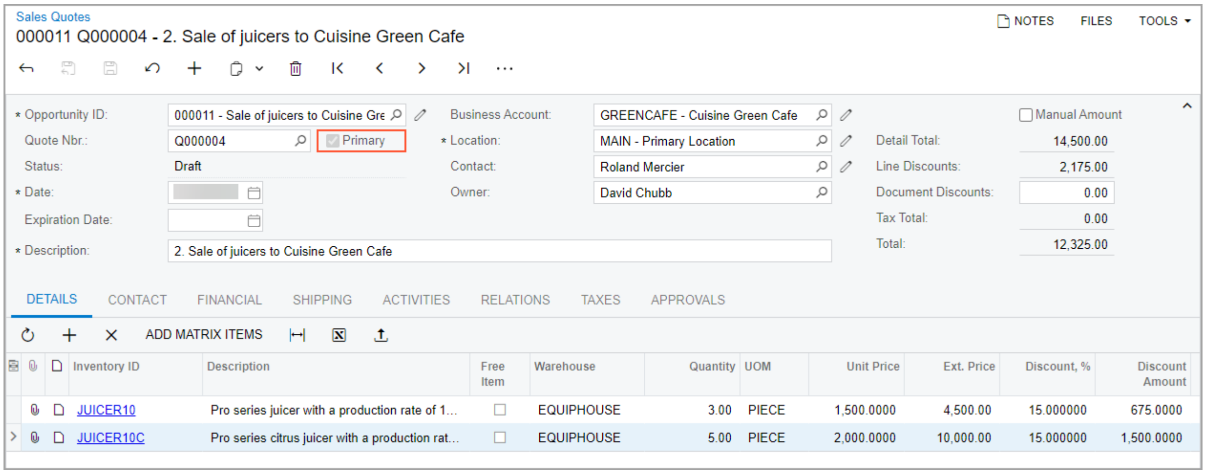


Figure: The sales quote set as the primary one

Notice that because this sales quote has become a primary quote for the *Sale of juicers to Cuisine Green Cafe* opportunity, the settings from the **Details** tab of the sales quote have been copied to the opportunity. You can view the opportunity on the *Opportunities* form by clicking the Edit button to the right of the **Opportunity ID** box of the Summary area of the *Sales Quotes* form.

Opportunity Management: To Create an Opportunity-Based Sales Order

The following activity demonstrates how to create a sales order that is based on an opportunity in Acumatica ERP.

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- The *Sale of jams to Greenex Cafe* opportunity has been created on the *Opportunities* (CR304000) form.
- On the *Business Accounts* (CR303000) form, the *GREENEX* business account with the *Business Account* type has been created.
- On the *Stock Items* (IN202500) form, the *APJAM96* and *ORJAM96* stock items, which hold the settings of apple and orange jams, have been created.
- On the **Details** tab of the *Opportunities* form, five *APJAM96* and five *ORJAM96* stock items have been added to the *Sale of jams to Greenex Cafe* opportunity.

Process Overview

In this activity, you will do the following:

1. On the *Opportunities* (CR304000) form, close the *Sale of jams to Greenex Cafe* opportunity as won.

2. Starting on the *Opportunities* form, extend the *GREENEX* business account to be a customer, and create a sales order associated with the *Sale of jams to Greenex Cafe* opportunity, which opens the *Sales Orders* (SO301000) form with the sales order.
3. Starting on the *Sales Orders* form, send the sales order to the customer by email, which opens the *Email Activity* (CR306015) form.

System Preparation

Before you start creating an opportunity-based sales order, 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: Closing an Opportunity as Won

To close the *Sale of jams to Greenex Cafe* opportunity as won, do the following:

1. Open the *Sale of jams to Greenex Cafe* opportunity on the *Opportunities* (CR304000) form.
2. On the form toolbar, click **Close as Won**.
3. In the **Details** dialog box, which opens, do the following:
   a. In the **Reason** box, select *Order Placed*.
   b. In the **Stage** box, select *Won*.
   c. Click **OK**. The system closes the dialog box. Most of the settings of the opportunity on the *Opportunities* form become unavailable for editing.

You have closed the opportunity as won.

Step 2: Creating a Sales Order

The creation of a sales order requires the selection of a customer. To meet this requirement, you need to extend the *GREENEX* business account to be a customer. You can do this while you create an opportunity-based sales order as follows:

1. While you are still viewing the *Sale of jams to Greenex Cafe* opportunity on the *Opportunities* (CR304000) form, on the More menu, under **Record Creation**, click **Create Sales Order**.
2. In the **Create Sales Order** dialog box, which opens, do the following:
   a. In the **Order Type** box (**Sales Order** section), make sure that *SO* is selected.
   b. In the **Customer Class** box (**Customer** section), select *DEFAULT*.
   c. In the **Customer Email** box, make sure that the *cathy@greenex.example.com* email address is inserted.
   d. Click **Create & Review**. The system verifies that all required boxes in the dialog box are filled in, closes the dialog box, creates the new customer based on the existing business account, and opens the *Sales Orders* (SO301000) form with a new sales order that contains many of the settings copied from the opportunity. Notice that on the **Details** tab, the lines contain the product data specified on the same tab of the opportunity.
3. On the form toolbar, click Save and Close. The system closes the *Sales Orders* form and returns you to the *Opportunities* form.
4. On the Summary area, click the Edit button to the right of the **Business Account** box. The *Business Accounts* (CR303000) form opens. On the **CRM Info** tab, notice that the type of the business account is now *Customer*.
5. On the **Relations** tab of the *Opportunities* form, notice that the system has added a row that holds the basic settings of the newly created sales order, as shown in the following screenshot. For details, see *Managing Relations*.

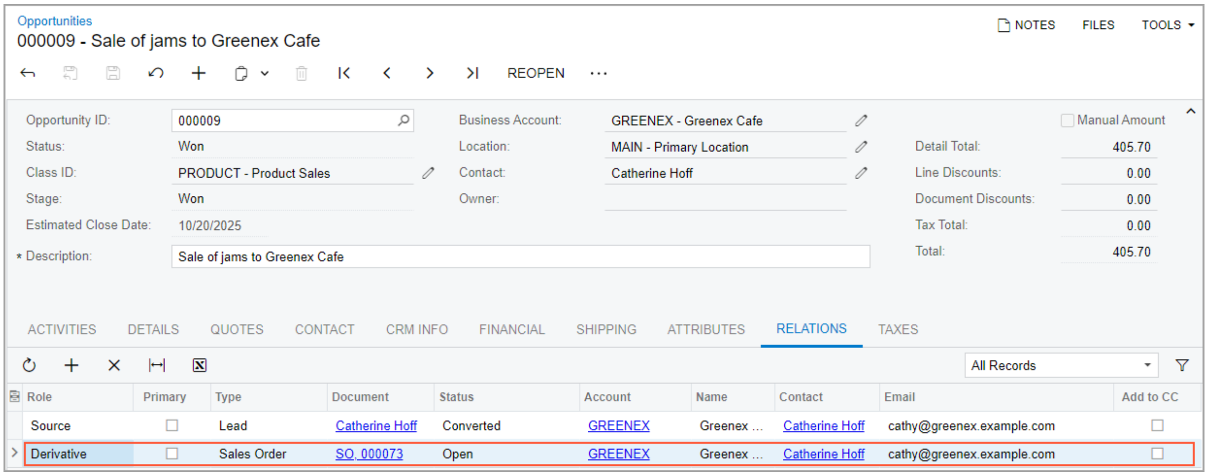


Figure: The basic settings of the opportunity-based sales order

Step 3: Sending the Sales Order to the Customer by Email

To send the sales order to the customer by email, do the following:

1. While you are still viewing the *Sale of jams to Greenex Cafe* opportunity on the **Relations** tab of the *Opportunities* (CR304000) form, in the **Document** column, click the link to the sales order that you have created in the previous step. The system opens the sales order on the *Sales Orders* (SO301000) form in a new browser tab.
2. On the More menu, under **Printing and Emailing**, click **Print Sales Order**. The system opens the *Sales Order* (SO641010) report, which displays a printable version of the sales order in a new browser tab.
3. On the report toolbar, click **Send**.
4. On the *Email Activity* (CR306015) form, which opens in a pop-up window, do the following:
   a. In the **From** box, select *sales@sweetlife.example.com*.
   b. In the text area, notice the template of the message for the customer. You can change the information in the message if needed.
   c. On the form toolbar, click **Send**. The system closes the form and sends an email to the customer email address from the system email account that you have selected.

> If the mailing settings have been specified and a template of the email has been created in the system, you can skip printing a sales order and instead click **Email Sales Order** on the More menu of the *Sales Orders* form. The system sends the email to the customer's email address from the system email account that you have selected.

You have sent the sales order to the customer by email.

> If you want to see emails associated with the sales order, on the title bar of the *Sales Orders* form for the sales order, click **Activities**. In the **Tasks & Activities** dialog box, you can see the list of these emails. You can click the link to the needed email to view the email on the *Email Activity* form.

Lesson 2.5: Managing Relations

In this lesson, you will learn about relations between different types of CRM records, such as leads, contacts, and business accounts. These entities can be related to one another as well as to other records, such as sales orders. You will also learn how to manage these relations.

Relations: General Information

In Acumatica ERP, as you work with a record related to customer relationship management (CRM)—such as a lead, contact, business account, opportunity, sales quote, or case—you can track the associated records on the **Relations** tab of the form used to create the record.

Learning Objectives

In this lesson, you will do the following:

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

Applicable Scenarios

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

- You have converted a lead to an opportunity, and you need to view this lead's summary information or open the lead on the *Leads* (CR301000) form by using the opportunity on the *Opportunities* (CR304000) form as a starting point.
- You have created a new opportunity and need to add a customer contact that represents a decision maker for this opportunity.
- You have created an opportunity-based sales order, and you need to quickly open this sales order on the *Sales Orders* (SO301000) form by using the opportunity as a starting point.

Relations in Acumatica ERP

You can use the relations on the **Relations** tab of the form where a CRM record is created to quickly find, view, and modify the associated records. You can use relations to associate business accounts and contacts with leads, cases, and opportunities. You can also associate opportunities with leads, contacts, business accounts, cases, and the related documents—such as sales quotes, sales orders, and invoices. For example, while you are working with an opportunity, with one click, you can access the related leads, sales orders, and invoices. And while you are viewing a lead, you might want to make edits to the related opportunities. You can see the associated records on the **Relations** tab of the following forms while you are viewing a record created on the form:

- *Business Accounts* (CR303000)
- *Contacts* (CR302000)
- *Leads* (CR301000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Cases* (CR306000)

- *Sales Orders* (SO301000)

For each relation listed for a record selected on any of these forms, one of the predefined relational roles is selected. The selected role conveys how the listed record is related to the record selected on the form.

For details about the relations between a sales order and the records associated with it, see *Relations: Sales Orders, Opportunities, and Other Entities*.

Relations between associated records on the **Relations** tab can be added automatically by the system based on actions executed by users or manually by users. For example, if you convert a lead to an opportunity by clicking **Convert to Opportunity** on the More menu of the *Leads* form, the system adds the relation between these records to the **Relations** tab of the *Leads* and *Opportunities* forms. The system also adds the relation between the lead and the business account and contact to the **Relation** tab of the *Leads*, *Business Accounts*, and *Contacts* forms if the business account and contact were created during converting the lead to the opportunity.

To manually create a relation with an associated record, you add a row on the **Relations** tab of the form of the record you are working with. In this row, you select the needed role in the **Role** column. Depending on the role, the **Type**, **Document**, **Account**, and **Contact** columns may become available. You select the record type in the **Type** column from the record types available for the selected role. When you have selected the associated record by its identifier in the **Document** column, the system inserts the links to the business account and contact associated with this record in the **Account** and **Contact** columns, respectively.

If you copy a record by using the **Copy** command, the rows from the **Relations** tab are not copied to the new record.

Types of Relational Roles

Acumatica ERP supports *one-way* and *bidirectional* relations between the associated records. In many cases, the relation between a pair of records is bidirectional. The type of relation is defined by the role in the **Role** column, which can be one-way or bidirectional.

The following roles are one-way: *Business User*, *Decision-Maker*, *Evaluator*, *Related Entity*, *Referrer*, *Support Engineer*, *Source*, *Supervisor*, and *Technical Expert*. For these roles, the relation is shown on the **Relations** tab of the form for only one record; no corresponding record is added to the **Relations** tab of the associated record. For most of the one-way roles, you can select a record of only the *Contact* record type. For the *Related Entity* role, you can select any record type of the associated record.

The *Source*, *Derivative*, *Parent*, and *Child* roles are bidirectional, which means that the relation is shown on the **Relations** tab of both the record selected on the form and the associated record. That is, if you add a relation with one of these roles, a corresponding relation will be added to the creation form of the record selected for the relation. If you select a bidirectional role, you can create a relation with any of the following record types: *Customer*, *Business Account*, *Lead*, *Contact*, *Employee*, *Vendor*, *Opportunity*, *Case*, *Sales Order*, *Purchase Order*, *AP Invoice*, *AR Invoice*, *Expense Receipt*, *Campaign*, and *Sales Quote*.

With bidirectional roles, a pair of roles are associated with each other in both directions: the original role (which is shown on the **Relations** tab of the record where the relation was originally specified) and the reverse role (which is specified on the **Relations** tab of the associated record). The relations between the roles are established in the system, a fixed set of relations between the roles is supported, and no pairs can be used beyond those listed below. The pairs of bidirectional roles are shown in the following table.

Table: Bidirectional Roles

Original Role	Reverse Role
Source	*Derivative*
Derivative	*Source*
Parent	*Child*

Original Role	Reverse Role
Child	*Parent*

Relations: Sales Orders, Opportunities, and Other Entities

In Acumatica ERP, you can track and manage bidirectional relations between a sales order, an opportunity, and a sales quote. Also, you can track one-way relations between a sales order and a variety of records that are associated with it. While viewing a sales order on the *Sales Orders* (SO301000) form, you can manually associate any of these records with the sales order and view the list of associated records on the **Relations** tab.

Relations Between Sales Orders, Opportunities, and Sales Quotes

On the *Sales Orders* (SO301000) form, the **Relations** tab is shown only if the *Customer Management* feature is enabled on the *Enable/Disable Features* (CS100000) form. The tab shows the following relations:

- Each system-added relation between the sales order and an opportunity.
- Each system-added relation between the sales order and a sales quote.
- Each relation between the sales order and another record that has been manually added for the sales order. These records include CRM entities and other system entities.

Relational Roles Supported for Sales Orders

Acumatica ERP supports *one-way* and *bidirectional* relations between a sales order and the associated records.

On the **Relations** tab of the *Sales Orders* (SO301000) form, you can add relations with the one-way *Related Entity* relational role for each relations between the selected sales order and a business account, a case, another sales order, or some other record defined in the system. (The types of entities are listed in the following section.) Because of the one-way nature of this role, if you add a relation with the *Related Entity* role for the sales order, this relation is shown only for the sales order. That is, the system does not automatically add this relation to the record on the form of the associated entity.

With bidirectional roles, the following roles are associated with each other in both directions:

- The original role, which is shown on the **Relations** tab of the form used to create the record where the relation was originally specified
- A reverse role, which is shown on the **Relations** tab of the form where the associated record was defined

The system supports only the fixed pairs of bidirectional roles listed in the following table.

Table: Bidirectional Roles

Original Role	Reverse Role
Source	*Derivative*
Derivative	*Source*
Parent	*Child*
Child	*Parent*

For example, if a sales order (original record) is created from an opportunity (associated record), then the opportunity becomes the source of the sales order, and the sales order becomes the derivative document for the opportunity.

Suppose that a user working on the *Opportunities* (CR304000) form clicks **Create Sales Order** to create a sales order on the *Sales Orders* form. To reflect this relation, on the **Relations** tab of the *Opportunities* form, the system adds a row for the sales order with the *Derivative* role (that is, the sales order becomes the derivative document for the opportunity). Also, on the **Relations** tab of the *Sales Orders* form, the system adds a row for the opportunity and specifies the *Source* role for this relation (that is, the opportunity becomes the source of the sales order) and the *Opportunity* type. On this tab, you can select various types of entities that can be associated with a sales order. The **Add to CC** check box—which indicates, if selected, that the contact in this row should receive a copy of notification emails—for the reverse role is always cleared, but you can manually select the check box.

Management of Relational Roles Supported for Sales Orders

For a sales order, you can manually add rows for bidirectional roles to the table on the **Relations** tab of the *Sales Orders* (SO301000) form if the sales order was created directly on the form or if the sales order was imported to the system. By using the one-way *Related Entity* role, you can manually add relations between a sales order and various system entities.

For manually added bidirectional and one-way relations, in the **Type** column, you can select the following types of the records that can be associated with a sales order:

- *AP Invoice*: An AP invoice created on the *Bills and Adjustments* (AP301000) form
- *AR Invoice*: An AR invoice created on the *Invoices and Memos* (AR301000) form
- *Business Account*: A business account created on the *Business Accounts* (CR303000) form
- *Campaign*: A marketing campaign created on the *Marketing Campaigns* (CR202000) form
- *Case*: A case created on the *Cases* (CR306000) form
- *Contact*: A contact created on the *Contacts* (CR302000) form
- *Customer*: A customer created on the *Customers* (AR303000) form
- *Employee*: An employee created on the *Employees* (EP203000) form
- *Expense Receipt*: An expense receipt created on the *Expense Receipts* (EP301010) form
- *Lead*: A lead created on the *Leads* (CR301000) form
- *Opportunity*: An opportunity created on the *Opportunities* (CR304000) form
- *Purchase Order*: A purchase order created on the *Purchase Orders* (PO301000) form
- *Sales Order*: Another sales order created on the *Sales Orders* form
- *Sales Quote*: A sales quote created on the *Sales Quotes* (CR304500) form
- *Vendor*: A vendor created on the *Vendors* (AP303000) form

You can manually add rows to or delete rows from the table on the **Relations** tab of the *Sales Orders* form unless the selected sales order has the *Completed* or *Canceled* status. If it has one of these statuses, the set of rows in the table is unavailable for editing.

If you copy a sales order by using the **Copy** command on the **Clipboard** menu or the **Copy Order** command on the More menu, the rows from the **Relations** tab are not copied to a new sales order.

Relations: Process Activity

The following activity demonstrates how to manage relations in Acumatica ERP.

Story

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

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the *Customer Management* feature has been enabled. This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and marketing campaigns.
- On the *Business Accounts* (CR303000) form, the *MYAVOCADO* business account of the *Customer* type has been created.
- On the *Opportunity Classes* (CR209000) form, the *PRODUCT* opportunity class has been created.
- On the *Leads* (CR301000) form, the *Kim Frey* lead has been created and associated with the *MYAVOCADO* business account.
- On the *Contacts* (CR302000) form the *Erica Spencer* contact has been created.
- On the *Stock Items* (IN202500) form, the *JUICER15* stock item, which holds the settings of a commercial juicer, has been created.

Process Overview

In this activity, you will do the following:

1. On the *Leads* (CR301000) form, convert a lead to an opportunity.
2. On the *Opportunities* (CR304000) form, do the following:
   a. Add products to the newly created opportunity.
   b. Specify a role in the opportunity for a contact (a decision maker).
   c. Create a sales order.
3. On the *Sales Orders* (SO301000) form, view the record associated with the sales order on the **Relations** tab.

System Preparation

Before you perform the activity, 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: Converting a Lead to an Opportunity

To convert the *Kim Frey* lead to an opportunity, do the following:

1. Open the Leads (CR3010PL) form.

2. In the **Display Name** column, click the *Kim Frey* link to open this lead on the *Leads* (CR301000) form.
3. On the More menu, under **Processing**, click **Convert to Opportunity**.
4. In the **Create Opportunity** dialog box, which opens, do the following on the **Main** tab:
   a. In the **Subject** box of the **Opportunity** section, type `Sale of juicers (JUICER15) to MyAvocado`.
   b. In the **Estimation** box, select the current business date.
   c. In the **Opportunity Class** box, select *PRODUCT*.
   d. In the **Business Account** section, notice that the system has inserted business account settings and that they are unavailable for editing.
   e. In the **Contact** section, notice that the system has inserted contact settings (which were specified in the **Contact** section of the *Leads* form).
   f. At the bottom of the dialog box, click **Create & Review**.

      The system closes the dialog box, converts the lead to an opportunity, creates a contact for the lead, and opens the opportunity on the *Opportunities* (CR304000) form. On the form, notice that values have been inserted in the **Business Account** and **Contact** boxes of the Summary area.

You have converted the lead to an opportunity.

Step 2: Reviewing the Relations Between the Opportunity and the Associated Lead

To review the relations between the lead and the opportunity it was converted to, do the following:

1. While you are still viewing the *Sale of juicers (JUICER15) to MyAvocado* opportunity on the *Opportunities* (CR304000) form, on the **Relations** tab, notice that a row has been added with the settings of the lead. The *Source* role is selected in this row because this lead was the source of the opportunity selected on the form.
2. In the **Document** column, click the link to the associated lead.
3. On the *Leads* (CR301000) form, which opens in a new browser tab, go to the **Relations** tab. Notice that a row has been added with the following settings of the associated opportunity:
   - **Role**: *Derivative*
   - **Type**: *Opportunity*
   - **Document**: The reference number of the opportunity, which is a link to it
   - **Account**: *MYAVOCADO*, which is a link to the customer's account
   - **Contact**: *Kim Frey*, which is a link to the customer's contact specified in the opportunity

   Also, notice that the system has created one more relation with the *Derivative* role for the associated contact.

Step 3: Adding a Product to the Opportunity

To add a product to the opportunity, do the following:

1. While you are still viewing the *Sale of juicers (JUICER15) to MyAvocado* leads on the *Leads* (CR301000) form, click to the link in the **Document** column. The *Sale of juicers (JUICER15) to MyAvocado* opportunity opens.
2. On the **Details** tab of the *Opportunities* (CR304000) form, add a new row.
3. In the new row, specify the following settings:
   - **Inventory ID**: *JUICER15*

     Notice that the system has filled in the settings for the *JUICER15* inventory item, including the **Tax Category** and **Discount, %** settings.
   - **Quantity**: `5`

- **Discount, %**: 5

  A 5% discount is applied to this detail line.

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

You have added the product and the applicable discount and quantity to the opportunity.

Step 4: Specifying a Role for a Customer Contact in the Opportunity

Suppose that you have confirmed the model and the number of juicers with Kim Frey and now need to discuss financial terms with Erica Spencer, who is the director of operations at the MyAvocado Lounge chain of restaurants. Further suppose that you have created a contact in the system. You need to associate the contact with the *MYAVOCADO* business account and specify Erica's role in the deal for the opportunity.

To add the *Decision-Maker* relation to the opportunity, do the following:

1. While you are still viewing the *Sale of juicers (JUICER15) to MyAvocado* opportunity on the *Opportunities* (CR304000) form, open the **Relations** tab, and add a row with the following settings:
   - **Role**: *Decision-Maker*

     Notice that in the **Type** column, *Contact* is inserted for the row, which means that you can select a decision maker only among contacts.
   - **Contact**: *Erica Spencer*

     Notice that the contact's email address is inserted in the **Email** column for the row.
   - **Add to CC**: Selected

     With this check box selected, the *Erica Spencer* contact's email address will be added to each email notification automatically sent to this contact.
2. On the form toolbar, click **Save**.

Step 5: Creating a Sales Order Associated with the Opportunity

To create a sales order for the *MYAVOCADO* customer, do the following:

1. While you are still viewing the *Sale of juicers (JUICER15) to MyAvocado* opportunity on the *Opportunities* (CR304000) form, on the More menu (under **Record Creation**), click **Create Sales Order**.
2. In the **Create Sales Order** dialog box, which opens, do the following:
   a. In the **Order Type** box, make sure that *SO* is selected.

   b. Click **Create & Review**. The system closes the dialog box and opens the *Sales Orders* (SO301000) form with a new sales order that contains many of the settings copied from the opportunity. Notice that on the **Details** tab, the system has inserted a line with the product data specified for the opportunity.
3. On the form toolbar, click **Save**.

You have created a sales order. Now you can view the relations between the opportunity and the sales order.

Step 6: Reviewing the Relations Between the Opportunity and the Sales Order

To review the relations between the opportunity and the sales order, do the following:

1. While you are still viewing the *Sale of juicers (JUICER15) to MyAvocado* sales order on the *Sales Orders* (SO301000) form, go to the **Relations** tab. Notice that a row with the following settings has been added for the associated opportunity (see the following screenshot):
   - **Role**: *Source*
   - **Type**: *Opportunity*
   - **Document**: The reference number of the opportunity, which is a link to it

- **Account**: *MYAVOCADO*, which is a link to the customer's account
- **Contact**: *Kim Frey*, which is a link to the customer's contact specified in the opportunity

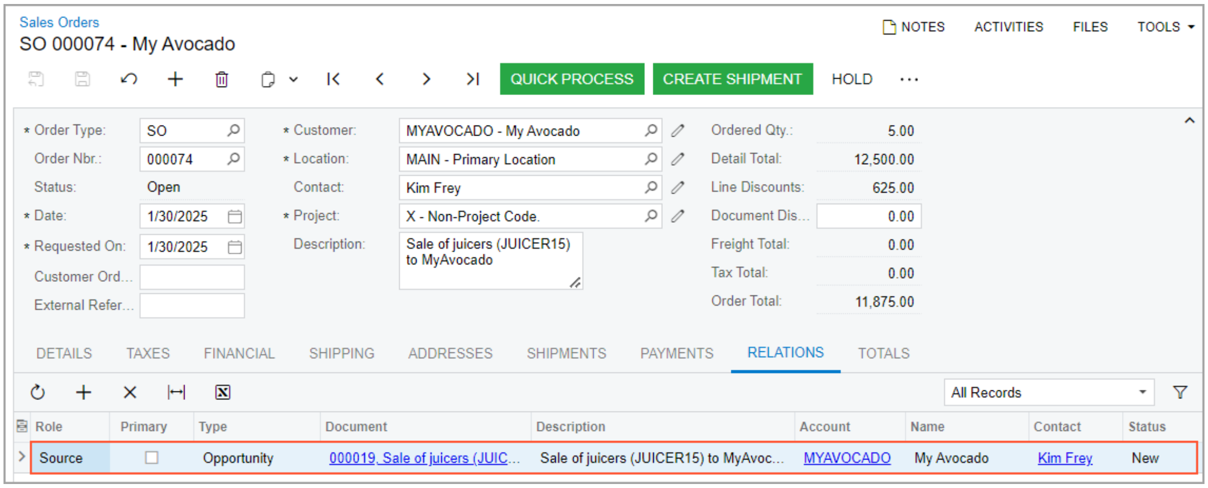


Figure: The relations in the sales order

2. Click the link in the **Document** column.
3. On the *Opportunities* (CR304000) form, which opens in a new browser tab, open the **Relations** tab. In addition to the lead that was converted to the opportunity and the decision maker that you have added earlier in this activity, notice that a row with the settings of the associated sales order has been added.

You have reviewed how the records associated with an opportunity are managed in the system.