End-User Course

CRM

Support Operations
2025 R1

Revision: 4/7/2025

Acumatica
The Cloud **ERP**

Contents

Copyright

Software Version: 2025 R1

Last Updated: 04/07/2025

How to Use This Course

This course introduces you to the Acumatica ERP case management functionality based on a set of examples that illustrate CRM customer support 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 support 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.

> (i) 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**.

> (i) 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: *garcia*

2. Lesson 2: *chubb*

3. Lesson 3.1-3.2: *vega*

4. Lesson 3.3: *garcia*

5. Lesson 4: *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: Creating Cases

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

Cases: General Information

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

Learning Objectives

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

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

Applicable Scenarios

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

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

Creation of Cases in Acumatica ERP

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

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

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

Settings of a Case

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

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

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

- On the **Details** tab, the description of the case.

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

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

- On the **Attributes** tab, the list of attributes, if they have been defined for the case class on the *Case Classes* form. Attributes may be used to help your company manage specific information that is useful for its business, such as the industry or number of employees in a customer company.

- On the **Activities** tab, emails, tasks, events, and activities associated with the case. You can use this tab as a starting point for adding activities and for viewing the activities that have been performed.

- On the **Related Cases** tab, the list of cases that block, depend on, are duplicates of, or are otherwise associated with this particular case (if any). For details, see *Case Management: General Information*.

- On the **Relations** tab, the list of records related to the case. You can also use this tab to quickly create an entity associated with the case. For details, see *Managing Relations*.

- On the **Closure Notes** tab, the case-related information. You can add, edit, and delete the information on this tab at any time.

The Initial Activity of a Case

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

Ability to Add User-Defined Fields to CRM Forms

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

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

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

Copying of User-Defined Fields Between Records

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

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

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

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

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

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

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

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

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

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

Cases: To Create a Case Manually

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

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality.
  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Attributes* (CS205000) form, the *PRODUCT* attribute for cases has been created.
- On the *Case Classes* (CR206000) form, the *DELIVERY* case class, which defines cases related to the sale and delivery of products, has been created.
- In the Summary area of the *Cases* (CR306000) form, the **User-Defined Fields** tab, which holds the values of attributes, has been added.

Process Overview

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

System Preparation

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

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

Step: Creating a Case Manually

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

1. On the *Cases* (CR306000) form, add a new record.
2. In the Summary area (**Document** tab), do the following:
   a. In the **Case Class** box, select *DELIVERY*.
   b. In the **Business Account** box, select *GROCERIEX*.
   c. In the **Contact** box, select *Kevin Grey*.
   d. In the **Subject** box, type `Delivery of the missing 10 jars of orange jam`.
   e. In the **Severity** box, select *Low*.
   f. In the **Priority** box, select **Medium**.
3. On the **User-Defined Fields** tab of the Summary area, in the **Products for sale** box, select *Orange jam 96 oz*.

   Products for sale is the description of the *PRODUCTS* attribute that was defined for the case class; the description of an attribute is used as its name on the UI.
4. On the **Details** tab of the form, in the text area, type `10 jars of orange jam were not delivered to GROCERIEX`.
5. On the form toolbar, click **Save**.

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

Figure: The case based on the customer's request

Lesson 2: Assigning Cases to Owners and Workgroups

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

Case Assignment to Owners and Workgroups: General Information

Acumatica ERP provides you with flexible tools for distributing the case workload within the company. You can use assignment maps to indicate to the system how to assign cases to individuals or groups of people (that is, to owners or workgroups). In the following sections, you will find information about assigning cases to owners and workgroups one by one or through mass processing.

Learning Objectives

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

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

Applicable Scenarios

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

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

Assignment of Cases to Owners and Workgroups in Acumatica ERP

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

You can manually assign an individual case to an owner or workgroup. When you create or edit the case on the *Cases* (CR306000) form, you can select an owner in the **Owner** box of the Summary area. Also you can assign a case to yourself by clicking **Take Case** on the form toolbar or on the More menu. To assign a case to a workgroup, you select a workgroup in the **Workgroup** box (on the **CRM Info** tab of the *Cases* form) and then select an owner in the **Owner** box. The list of owners available for selection is narrowed to only owners from the selected workgroup.

You can assign groups of cases that do not have owners specified by using the *Assign Cases* (CR503210) mass processing form. On this form, you can assign selected cases or all cases that do not have owners, and the system uses the case assignment map specified in the **Case Assignment Map** box (in the **Assignment Settings** section of the **General** tab) of the *Customer Management Preferences* (CR101000) form to determine the owners of the cases.

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

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

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

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

The Usage of a Company Tree for Assignment

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

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

Distribution of Cases by Using Assignment Maps

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

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

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

Execution Errors Related to the Mass-Assignment of Cases

If an assignment map contains errors (for example, a workgroup contains an employee who has quit the company and cannot be assigned to any records) and you have processed any cases that should be assigned according to this assignment map by using the *Assign Cases* (CR503210) form, the system will list these errors in the **Processing** dialog box. You can view the error by clicking the More button on the **Errors** tile. In the **Message** column, the system displays the text of the error message.

Notifications About Assigning a Case to an Owner

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

Case Assignment to Owners and Workgroups: Process Activity

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

Story

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

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality.
  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Case Classes* (CR206000) form, the *PRESALE*, *DELIVERY*, and *JREPAIR* case classes have been created.
- On the *Assignment Maps* (EP205010) form, the *Case Assignment Map* has been created. According to the rules (and their conditions and actions) specified in this assignment map, cases are assigned as follows:
  - The cases of the *PRESALE* case class are assigned to David Chubb.
  - The cases of the *DELIVERY* case class are assigned to the *Delivery* workgroup in the SweetLife *After-Sales* department.
  - The cases of the *JREPAIR* case class are assigned to the *Technical Support* workgroup in the *After-Sales* department.
- On the *Cases* (CR306000) form, the case that has the *Repair of a juicer for Delicious Energy Restaurant* subject has been created.

Process Overview

In this activity, you will do the following:

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

System Preparation

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

1. Sign in to the system as sales manager David Chubb by using the following credentials:
   - **Username**: *chubb*
   - **Password**: *123*

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

3. Make sure that on the *Customer Management Preferences* (CR101000) form (in the **Case Assignment Map** box of the **Assignment Settings** section of the **General** tab), *Case Assignment Map* is specified. If it is not, select this assignment map, and save your changes. The system will use this assignment map during the process of mass-assigning cases.

Step 1: Assigning a Case to an Owner

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

1. Open the *Repair of a juicer for Delicious Energy Restaurant* case on the *Cases* (CR306000) form.

2. In the **Owner** box of the Summary area, select *Jeffrey Vega*.

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

You have manually assigned a case to an owner.

Step 2: Assigning the Unassigned Cases to Owners and Workgroups

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

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

1. Open the *Assign Cases* (CR503210) form, which lists all the cases with the **Active** check box selected on the **CRM Info** tab of the *Cases* (CR306000) form.

2. In the table, click the header of the **Owner** column.

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

3. In the Sorting and Filtering Settings dialog box, which opens, do the following to filter unassigned cases:

   a. Select the *Is Empty* filter condition.

   b. Click **OK**. The system closes the dialog box and applies the filter.

4. On the form toolbar, click **Process All**. The **Processing** dialog box opens, showing the progress and, as soon as the processing has completed, the results of assigning cases.

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

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

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

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

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

Assign Cases ☆   TOOLS ▾

♻ ↩   PROCESS   PROCESS ALL   ⏱ ▾   ↦| ⊠   ▽

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

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

Lesson 3: Managing Cases

In this lesson, you will learn how to manage billable and non-billable cases.

Case Management: General Information

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

Learning Objectives

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

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

Applicable Scenarios

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

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

Case Management in Acumatica ERP

In Acumatica ERP, you can create, process, and close cases. The processing of cases is described further in this topic. You can also associate a case with another case, if needed, as described in *Relationships Between Cases*.
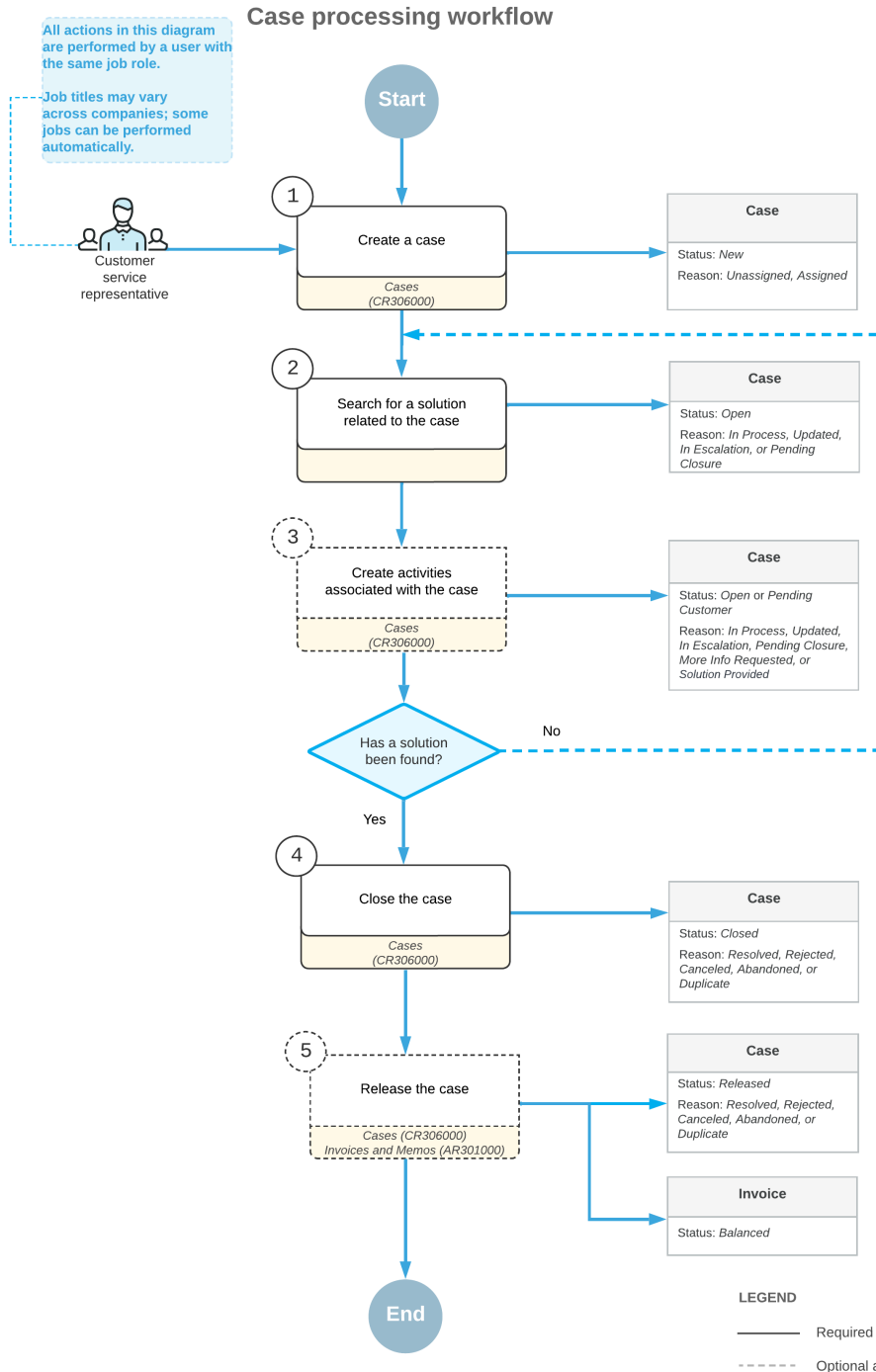
Depending on your company's customer support processes, users involved in case management can manage a case by performing the following steps:

1. Creating a case in the system: On the *Cases* (CR306000) form, the appropriate employee creates a case to record the customer's request or problem. For details, see *Creating Cases*.

2. Assigning a case to an owner: The case creator or another responsible user assigns the case to an owner. This user can begin work on the case or assign the case to another owner. For details, see *Case Assignment to Owners and Workgroups: General Information*.

3. Escalating a case to another support level or team (optional): The owner of the case escalates the case if they have explored the problem and concluded that it needs to be transferred to a higher level of support that is better suited to find a solution, or to another team to perform some task for the case (such as processing a customer return or refund).

4. Searching for a solution: This step may involve communication with the customer support team, your company, and the customer, as well as any needed external communication, in order to find the solution for the customer's request or problem.

5. Creating activities associated with the case (optional): In Acumatica ERP, you can track the activities you perform to resolve the case. These activities may include creating emails, making phone calls, or conducting meetings. You can create and track these activities by using the **Activities** tab of the *Cases* form. For details, see *Managing Emails and Activities*. If an associated completed activity contains a solution for a case, you can mark it as a case solution on the form of its creation.

6. Closing the case on the *Cases* form.

7. Releasing the case activities, the case, or both the case and the activities, and billing the customer by creating an invoice based on the case or the case activities (optional): Individual cases are billed once they are released on the *Cases* form, and cases that are managed according to a contract are billed in batches when it is time to issue an invoice for the contract. For details, see *Case Management: Billable Cases*.

Workflow of Case Processing

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

Case processing workflow

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

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

Start

Customer service representative

1
Create a case

Cases (CR306000)

Case
Status: *New*
Reason: *Unassigned, Assigned*

2
Search for a solution related to the case

Case
Status: *Open*
Reason: *In Process, Updated, In Escalation, or Pending Closure*

3
Create activities associated with the case

Cases (CR306000)

Case
Status: *Open* or *Pending Customer*
Reason: *In Process, Updated, In Escalation, Pending Closure, More Info Requested, or Solution Provided*

Has a solution been found? — No

Yes

4
Close the case

Cases (CR306000)

Case
Status: *Closed*
Reason: *Resolved, Rejected, Canceled, Abandoned, or Duplicate*

5
Release the case

Cases (CR306000)
Invoices and Memos (AR301000)

Case
Status: *Released*
Reason: *Resolved, Rejected, Canceled, Abandoned, or Duplicate*

Invoice
Status: *Balanced*

End

LEGEND

――――― Required action

- - - - - Optional action

Processing of a Case Through Statuses

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

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

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

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

Relationships Between Cases

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

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

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

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

Template-Based Emails Related to Cases

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

Case Management: Billable Cases

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

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

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

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

Case-Based Billing Settings

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

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

Activity-Based Billing Settings of a Case

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

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

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

Billable Activities Associated with a Case

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

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

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

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

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

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

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

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

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

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

Billable Activities Associated with a Project

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

Case Management: Return Orders

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

Creation of Return Orders

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

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

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

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

- **Order Type**: The system inserts the order type that was specified in the **Create Return Order** dialog box. If you change the order type in the return order, the other predefined values will be removed, and the relation between the return order and the case will be lost.
- **Customer**: The system inserts the customer that was specified in the **Business Account** box of the *Cases* form for the case.
- **Location**: The system inserts the location that was specified in the **Location** box in the Summary area of the *Cases* form for the case. If no location is specified in this box, the system inserts the *MAIN* location of the customer by default.

  This box appears on the form only if the *Business Account Locations* feature is enabled on the *Enable/Disable Features* form.
- **Contact**: The system copies the contact that was specified in the **Contact** box of the *Cases* form. If this box is empty for the case, the system leaves the box empty for the return order.
- **Description**: The system inserts the text that was entered into the **Subject** box of the *Cases* form.

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

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

Notifications About the Closure of Case-Related Return Orders

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

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

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

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

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

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

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

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

Case Management: To Process a Non-Billable Case

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

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Case Classes* (CR206000) form, the *PRESALE* case class, which defines presales requests from potential clients and customers, has been created.
- On the *Cases* (CR306000) form, a case has been created that has *Request for compatibility of accessories* in the **Subject** column.
- On the *Contacts* (CR302000) form, the *Chuck Hester* contact has been created.

Process Overview

In this activity, you will do the following:

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

System Preparation

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

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

- **Username**: *vega*
- **Password**: *123*

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

Step 1: Opening the Case

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

1. Open the *Request for compatibility of accessories* case on the *Cases* (CR306000) form.

2. On the form toolbar, click **Take Case**. Notice that in the **Owner** box, the system has inserted *Jeffrey Vega*.

3. Click **Open**.

4. In the **Open** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

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

Step 2: Creating the Case-Related Email

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

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

1. While you are still viewing the case on the *Cases* (CR306000) form, on the More menu, under **Activities**, click **Create Email**. The *Email Activity* (CR306015) form opens in a pop-up window. Notice that in the **To** box, the system has inserted the contact's name, *Chuck Hester*, and in the **Subject** box, the system has inserted the ID and the subject of the case.

2. In the **From** box, select the *support@sweetlife.example.com*.

3. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

```
Dear Chuck,

I am happy to confirm that the feeder kit and the peel ejector kit are
compatible with the JUICER10C. You can easily use them with the juicer at
your convenience.
```

4. On the **Details** tab, select the **Internal** check box to hide the email from the Self-Service Portal users.

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

6. Click **Send**. The system closes the *Email Activity* form and returns you to the *Cases* form. Notice that a row with the *Email* type is added to the table on the **Activities** tab of the *Cases* form.

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

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

Step 3: Closing the Case

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

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

2. In the **Close** dialog box, which opens, do the following:

   a. In the **Reason** box, select *Resolved*.

   b. Click **OK**. The system closes the dialog box and returns you to the form.

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

Figure: The closed non-billable case

Case Management: To Process a Billable Case

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

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Case Classes* (CR206000) form, the *JREPAIR* case class, which defines cases related to the repair and maintenance of juicers, has been created. The *Per Case* billing mode has been specified for this case class.
- On the *Cases* (CR306000) form, a case has been created that has the *Request for juicer repair from Storehut* in the **Subject** column.
- On the *Business Accounts* (CR303000) form, the *STOREHUT* business account record has been created and extended as a customer, with its settings specified on the *Customers* (AR303000) form.

Process Overview

In this activity, you will do the following:

1. Open the case on the *Cases* (CR306000) form.

2. Create a billable email on the *Email Activity* (CR306015) form to record the results of the repair and inform the customer about fixing the juicer.

3. Create a billable activity of the *Work Item* type on the *Activity* (CR306010) form to record the results of delivering the repaired juicer to the client.

4. Close the case on the *Cases* form.

5. Release the case for billing on the *Cases* form, which causes the system to generate an AR invoice on the *Invoices and Memos* (AR301000) form.

6. View the AR invoice on the *Invoices and Memos* form.

System Preparation

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

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

2. Make sure that the business date in your system is set to 1/30/2025. If a different date is displayed, click the Business Date menu button in the top pane of the Acumatica ERP screen, and select 1/30/2025 in the calendar.

Step 1: Opening the Case

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

1. Open the *Request for juicer repair from Storehut* case on the *Cases* (CR306000) form.

2. On the form toolbar, click **Open**.

3. In the **Open** dialog box, which opens, click **OK**. The system closes the dialog box and returns you to the form.

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

Step 2: Creating a Billable Email Associated with the Case

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

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

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

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

2. In the **From** box, select *support@sweetlife.example.com*.

3. On the **Message** tab, type the text of the email body. As an example, you can type the following message:

```
Dear Tonya,

The juicer JUICER15 has been repaired.

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

4. On the **Details** tab, do the following:

   a. Select the **Track Time and Costs** check box. This causes the system to display additional UI elements on the tab.

   b. Make sure that the **Billable** check box is selected.

   c. Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that you have performed the repair during your working hours.

   d. In the **Time Spent** box, select *02:30*, which means that it took you two and a half hours to repair the juicer. Notice that in the **Billable Time** box, the system has inserted the time that you have specified in the **Time Spent** box.

   e. In the **Project** box, select *X—Non-Project Code*.

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

6. Click **Send**. The system closes the *Email Activity* (CR306015) form and returns you to the *Cases* form. Notice that a row with the *Email* type has been added to the table on the **Activities** tab of the *Cases* form for the case.

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

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

7. On the **Activities** tab, in the **Summary** box, click the link to open the email.

8. On the **Details** tab, in the **Status** box, select *Completed*.

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

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

10. Close the form. The system returns you to the *Cases* form with the case open.

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

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

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

1. While you are still viewing the case with the *Request for juicer repair from Storehut* subject on the *Cases* (CR306000) form, on the table toolbar of the **Activities** tab, click **Create Activity > Create Work Item**. The *Activity* (CR306010) form opens in a pop-up window.

2. In the **Summary** box, type a brief description of the activity: `Delivery of a juicer to Storehut.`

3. Make sure that the **Internal** check box is selected to hide the activity from the Self-Service Portal users.

4. In the **Start Date** box, specify the current date.

5. In the text area, type your comments or any other information related to the delivery, such as `The courier Tim Fincher will deliver the juicer.`

6. Select the **Track Time and Costs** check box. This causes the system to display additional UI elements in the Summary area.

7. In the **Status** box, select *Completed*.

8. Make sure that the **Billable** check box is selected.

9. Make sure that in the **Earning Type** box, *RG—Regular Hours* is selected, which means that the juicer will be delivered during working hours.

10. In the **Time Spent** box, select *01:00*, which means that it will take an hour to deliver the juicer. Notice that in the **Billable Time** box, the system has copied the time that you have specified in the **Time Spent** box.

11. In the **Project** box, select *X—Non-Project Code*.

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

13. Close the form. The system returns you to the *Cases* form. Notice that a row with the *Work Item* type has been added to the table on the **Activities** tab of the *Cases* form for the case.

Step 4: Closing the Case

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

1. While you are still viewing the *Request for juicer repair from Storehut* case on the *Cases* (CR306000) form, on the form toolbar, click **Close**.

2. In the **Close** dialog box, which opens, do the following:

   a. In the **Reason** box, select *Resolved*.

   b. Click **OK**. The system closes the dialog box and returns you to the form.

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

Step 5: Releasing the Case

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

1. While you are still viewing the case on the *Cases* (CR306000) form, open the **Activities** tab.

2. On the table toolbar, click **Refresh** to make sure that all the activities are displayed.

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

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

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

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

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

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

Step 6: Viewing the Case-Based Invoice

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

1. While you are still viewing the case on the *Cases* (CR306000) form, on the More menu, under **Other**, click **View Invoice**.

2. On the **Details** tab of the *Invoices and Memos* (AR301000) form, which opens, notice one detail row with the following settings of the invoice (see the following screenshot):

   • **Inventory ID**: The *TECHNICIAN* labor item
   • **Unit Price**: The rate for the works performed
   • **UOM**: HOUR
   • **Quantity**: The number of hours that were spent to resolve the case

Figure: The case-based invoice

Case Management: To Create a Return Order from a Case

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

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

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality, including lead and customer tracking, as well as the handling of sales opportunities, contacts, marketing lists, and campaigns.
  - *Case Management* in the *Customer Management* group of features: This feature gives customer support personnel the ability to create support cases, assign cases to owners, and process cases.
- On the *Case Classes* (CR206000) form, the *SUPPORT* case class, which defines support requests from customers, has been created.
- On the *Business Accounts* (CR303000) form, the *COFFEESHOP* business account record has been created and extended as a customer, with its settings specified on the *Customers* (AR303000) form.
- On the *Contacts* (CR302000) form, the *Andrea A. Weaver* contact has been created and specified as the primary contact for the *COFFEESHOP* business account.
- On the *Sales Orders Preferences* (SO101000) form, the *RM* order type has been specified in the **Default Return Order Types** box.

Process Overview

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

System Preparation

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

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

Step: Creating a Return Order from a Case

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

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

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

6. On the *Sales Orders* form, notice that the system has inserted the *RM* type for the return order and populated the corresponding boxes with the settings specified in the case.

7. On the **Details** tab, click **Add Row** on the table toolbar, and do the following:

    •   In the **Inventory ID** column, select *JUICER15C*.

    •   In the **Warehouse** column, select *WHOLESALE*.

    •   In the **Quantity** column, type 1.

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

Lesson 4: Submitting Cases to Internal Teams

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

Case Submittal to Internal Teams: General Information

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

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

Learning Objectives

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

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

Applicable Scenarios

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

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

Submittal of a Case to an Internal Team

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

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

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

multiple related companies. If the company has multiple branches, the name of the branch is inserted instead of the company name.

Creation of Cases to Internal Teams in Acumatica ERP

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

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

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

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

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

Case Submittal to Internal Teams: Process Activity

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

Story

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

Configuration Overview

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

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Customer Management*: This feature provides the customer relationship management (CRM) functionality.
  - *Case Management* in the *Customer Management* group of features: This feature gives users the ability to create support cases, assign cases to owners, and process cases.
- On the *Case Classes* (CR206000) form, the *ITHELP* case class has been created for the internal cases that employees submit to the SweetLife's IT team. On the **Details** tab, the **Allow Selecting Employee as Case Contact** check box is selected.

Process Overview

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

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

System Preparation

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

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

Step: Submitting an Internal Case to IT

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

1. On the *Cases* (CR306000) form, add a new record.
2. In the Summary area of the **Document** tab, do the following:
   a. In the **Case Class** box, select *ITHELP*.
   b. In the **Contact** box, select *Kimberly Gibbs*.

   Notice that in the **Business Account** box, *HEADOFFICE* has been inserted. It is the identifier of the *SweetLife Head Office and Wholesale Center* branch, to which the *Kimberly Gibbs* employee belongs.

   c. In the **Subject** box, type `Ability to specify a customer's company size and the number of employees on the Opportunities form.`
   d. In the **Priority** box, select **Medium**.
3. On the **Details** tab of the form, in the text area, type `Kimberly, please add two boxes to the Opportunities form: Company Size and Number of Employees.`
4. On the form toolbar, click **Save**.

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