

CRM in Acumatica Overview

3 main areas of the CRM module:

- Marketing
 - Leads
 - Contacts
 - Marketing Lists/Campaigns
- Opportunities
 - Pipeline management
 - Sales Quotes/Sales Orders
- Support
 - Cases

■ Review CRM Flow Dashboard

Demo:

1. Outlook add-in
 - a. Create a lead/contact
 - i. View Contact from Outlook
 - b. Log email activity
 - i. View on Activities tab
 - c. Create Opportunity
 - i. Create at "\$0" amount – let the Opportunity calculate from the product details tab
 - ii. View Opportunity
 - iii. Add products
 1. AALEGO500
 2. Qty 10
 - iv. Open Opportunity and Create Sales Quote
 1. Send email
 2. Review Actions
 3. Review Opportunity > Quotes tab
 4. Quote versioning
 - a. Copy Quote
 - b. Add AACOMPUT01 – qty 1
 5. Mark Accepted
 6. Opportunity > Create Account (Business)
 - a. Status = Prospect
 - b. View Opportunities tab
 - c. View Contacts tab
 - d. Opportunity > Actions > Create Sales Order

- i. Forced error – Opportunity must be associated to a customer
- e. Convert Business Account from Prospect to Customer
- f. Opportunity > Actions > Create Sales Order
- g. Review SO
 - i. Standard pick-pack-ship process can ensue
 - ii. Notice button color highlighting on “Create Shipment”
 - iii. Save and Close
- h. Review Business Account > Orders tab
- i. Close Opportunity as Won

2. Support Case

- a. Create from Outlook integration
 - i. Add notes/status
 - ii. Review workflow
- b. Activities/Notes tracking
- c. Close and resolve case

3. Marketing

- a. Create Marketing List from GI
 - i. Create GI to find all AALEGO500 sales over the last 12 months
- b. Review Campaign from Marketing List (Upgrade)
 - i. Campaign > “Upgrade”
 - ii. Dynamic List from GI > “MK-List-01”
 - 1. Review GI
- c. Create Mass Email
 - i. From Marketing List “ML-List-01”
 - ii. Viewed/Opened click tracking (not enable yet in this BETA copy)