Sales Consultant- Job Aid

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## Managing Leads, Contacts, and Business Accounts

This section contains step-by-step instructions related to managing leads, contacts, and business accounts in MYOB Acumatica.

### Creating a Contact

1. Open the Contacts (CR302000) form.

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|  | To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New**. |
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1. On the form toolbar, click **Add New Record**, and on the Details tab, do the following:
   1. In the **Contact section**, type the contact's name in the First Name and Last Name boxes and specify other available details about the contact.
   2. In the Address section, in the **Country** box, select the country of the contact and specify other available details about the address.
2. On the CRM Info tab in the **Contact Class** box of the CRM section, select the class that associates with the contact record.
3. On the form toolbar, click **Save**.

### Converting a Lead to a Contact

1. Open the Leads (CR3010PL) form.
2. In the table, click the **lead record** for which you want to create a linked contact. The Leads (CR301000) form opens. Make sure, that the lead has the New, Open, Sales-Ready, or Sales-Accepted status.
3. On the More menu (under Record Creation), click **Create Contact**.

The Create Contact dialog box opens. The dialog box is filled in with the contact information specified for the lead.

1. In the dialog box, do the following:
   1. If needed, on the Main tab, specify **missing values** and adjust the default ones.
   2. Click **Create**.

### Creating a Business Account from a Lead

1. Open the Leads (CR3010PL) form.
2. In the table, click the **lead record** that you want to use as the basis for a new business account. The Leads (CR301000) form opens. Make sure that the lead record has the New, Open, Sales-Ready, or Sales-Accepted status.
3. On the More menu (under Record Creation), click **Create Account**. The Create Account dialog box opens.
4. In the **Business Account group** of settings on the Main tab of the dialog box, specify the following information:
   1. In the Business **Account ID** box, type the identifier of the new business account.
   2. In the **Business Account Name** box, type the name of the prospective customer. The box might contain a value by default if someone has already specified one in the contact information of the lead.
   3. In the **Business Account Class** box, select the business account class to which the business account will belong.
5. If needed, in the **Contact group** of settings of the Main tab of the dialog box, specify missing values and adjust the default ones.

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|  | If a linked contact already exists for the lead, the system displays the settings in the Contact group of settings as read-only. |
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1. On the **Attributes** tab of the dialog box, specify any missing values or update values for the attributes.
2. On the **User-Defined Fields** tab of the dialog box, specify any missing values or update values for the user- defined fields (if any).
3. Click **Create**.

### Converting a Business Account to a Customer

1. Open the Business Accounts (CR3030PL) form.
2. In the table, click the **business account** that you want to convert to a customer account. The Business Accounts (CR303000) form opens.
3. On the form toolbar, **click Extend as Customer**.

The Customers (AR303000) form opens. The form is filled in with the data of the business account. Review the data and, if needed, add or modify the information about the account.

1. Click **Save** on the form toolbar.

### Converting a Business Account to a Supplier

1. Open the Business Accounts (CR3030PL) form.
2. In the table, click the **business account** that you want to convert to a supplier account. The Business Accounts (CR303000) form opens.
3. On the More menu (under Record Creation), click **Extend as Supplier**.

The Supplier (AP303000) form opens. The form is filled in with the data of the business account. Review the data and, if needed, add or modify the information about the account.

1. Click **Save** on the form toolbar.

## Managing Opportunities

This section contains step-by-step instructions related to managing opportunities in MYOB Acumatica.

### Creating an Opportunity

1. Open the Opportunities (CR304000) form.

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|  | To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New**. |
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1. On the form toolbar, click **Add New Record**.
2. In the **Summary** area, do the following:
   1. In the **Class ID** box, select the opportunity class.
   2. In the **Stage** box, select the current stage of the opportunity.
   3. In the **Estimated Close Date** box, select the estimated date of closing the deal.
   4. In the **Subject** box, specify the subject of the opportunity or a description.
   5. If needed, in the **Business Account** box, select the business account of the prospective customer.
   6. If needed, in the **Contact** box, select the contact that will associate with the opportunity.
   7. If needed, select the **employee** to assign to the opportunity in the Owner box.
3. On the **CRM Info** tab, specify the following information:
   1. If needed, in the **Source** box, select the source of the opportunity.
   2. If needed, in the **Source Campaign** box, select the source campaign of the opportunity.
4. In the **Project** box on the Financial tab, select the project that associates with the opportunity or specify the non-project code.
5. On the form toolbar, click **Save**.

### Creating an Opportunity from a Lead

1. Open the Leads (CR3010PL) form.
2. In the table, click the **lead record** that you want to convert to a new opportunity. The Leads (CR301000) form opens. Make sure that the lead has the New, Open, Sales-Ready, or Sales-Accepted status.
3. On the More menu (under Processing), click **Convert to Opportunity**. The Create Opportunity dialog box opens.
4. In the **Opportunity group** of settings on the Main tab of the dialog box, do the following:
   1. In the **Subject text** box, type a brief description of the opportunity.
   2. In the **Estimation** box, specify the estimated date of closing the deal.
   3. In the **Opportunity Class** box, select the opportunity class to which the opportunity will belong.
5. In the **Business Account group** of settings on the Main tab of the dialog box, specify the following information:
   1. In the **Business Account ID** box, type the identifier of the new business account.
   2. In the **Business Account Name** box, type the name of the prospective customer. The box might contain a value by default if someone has already specified one in the contact information of the lead.
   3. In the **Business Account Class** box, select the business account class to which the business account will belong.

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|  | If a linked business account already exists for the lead, the system displays the settings in this group as read-only. |
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1. In the **Contact group** of settings on the Main tab of the dialog box, specify missing values and adjust the default ones.

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|  | If a linked contact already exists for the lead, the system displays the settings in this group as read-only. |
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1. On the **Attributes** tab of the dialog box, specify any missing values or update values for the attributes (if any).
2. On the **User-Defined Fields** tab of the dialog box, specify any missing values or update values for the user- defined fields (if any).
3. Click **Create** at the bottom of the dialog box.

The system closes the dialog box, converts the lead to an opportunity on the Opportunities (CR304000) form, and creates a contact and a business account for the lead.

### Creating an Opportunity with the Acumatica Add-In

1. Open Outlook and select any email.
2. Click the **Acumatica button** to open the Acumatica add-in for Outlook form.
3. In the **Person box** of the Acumatica add-in for Outlook form, select a lead, contact, or business account for which you want to create an opportunity.
4. In the bottom of the Acumatica add-in form, click **Create Opportunity**. The New Opportunity Details group of elements appears on the form.
5. In the **Class ID** box, select the opportunity class to which the opportunity will belong.
6. In the **Subject** box, type a brief description of the opportunity. The system specifies the email subject in this box by default.
7. In the **Stage** box, select the current stage of the opportunity.
8. In the **Est. Close Date** box, specify the estimated date of the deal closure.
9. In the **Amount** boxes, type the estimated amount of the deal and select the currency of the deal.
10. Specify the branch related to the opportunity in the **Branch** box.
11. Click **Create Opportunity**.

### Assigning an Opportunity to an Owner

1. Open the Opportunities (CR3040PL) form.
2. In the table, click the **opportunity record** that you want to assign to an owner to open the Opportunities (CR304000) form.
3. If needed, in the **Workgroup** box of the CRM Info tab, select the workgroup that will assign the opportunity.
4. In the **Owner** box in the Summary area, select the employee to whom you want to assign the opportunity. If you specify a workgroup in the Workgroup box on the CRM Info tab, the system limits the list of employees available for selection to those included in the selected workgroup.
5. On the form toolbar, click **Save**.

### Assigning Multiple Opportunities to Owners

1. Open the Assign Opportunities (CR503110) form.
2. In the table, click the header of the **Owner** column and select the **Is Empty** filter condition to filter unassigned opportunities.
3. Do one of the following:
   1. To assign opportunities, in the unlabelled column, select the check boxes for the **opportunities** that you want to assign, and then click Process on the form toolbar.
   2. To assign all listed opportunities, click **Process All** on the form toolbar.

### Preparing an Initial Proposal

1. Open the Opportunities (CR3040PL) form.
2. On the appropriate filter tab, click the **opportunity** for which you want to prepare an initial proposal. The Opportunities (CR304000) form opens.
3. In the table on the Details tab, add one row for each of the products that you want to include in the proposal. For each row, specify the following information:
   1. In the **Inventory ID** column, select the inventory item that defines the proposed product.
   2. In the **Quantity** column, specify the quantity of the product.
   3. If needed, in the UOM column, specify the **unit of measure** used in the proposal.
   4. If you include the product for free, select the **Free Item** check box. Otherwise, in the Unit Price column, specify the proposed price per unit of the product.
   5. If needed, modify the **tax category** in the Tax Category column to assign it to the product.
4. Click **Save** on the form toolbar.

### Entering a Discount for an Opportunity

1. Open the Opportunities (CR3040PL) form.
2. On the appropriate filter tab, click the **opportunity** for which you want to enter a discount. The Opportunities (CR304000) form opens.
3. If you want to specify a discount individually for any item included in the proposal, do any of the following:
   1. On the **Details** tab, type the discount percentage in the Discount, % column for each discounted item. In this case, the system calculates the respective values in the Discount Amount column automatically.
   2. On the **Details** tab, type the discount amount in the Discount Amount column for each discounted item. In this case, the system calculates the respective values in the Discount, % column automatically.

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|  | To specify a discount amount to apply to the total amount of all products and services included in the opportunity, select the **Manual Amount** check box in the Summary area of the form, and then type the discount amount in the Discount box, which becomes available for editing when you select the check box. |
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1. On the form toolbar, click **Save**.

### Closing an Opportunity

1. Open the Opportunities (CR3040PL) form.
2. On the appropriate filter tab, click the **opportunity** that you want to close. The Opportunities (CR304000) form opens.
3. On the form toolbar, do any of the following:
   1. On the More menu (under Processing), click **Close as Won** if you have successfully negotiated with the customer all aspects of the deal and can proceed with creating an invoice or sales order based on the opportunity.
   2. On the More menu (under Processing), click **Close as Lost** if you have lost the opportunity.
4. In the **Details dialog** box, which opens, specify the following information:
5. In the **Reason** box, choose the reason for winning or losing the opportunity.
6. If needed, in the **Stage** box, select the stage at which the opportunity has been won or lost.
7. Click **OK**.

Make sure that the status of the opportunity has changed to Won or Lost depending on the reason for closing the opportunity. If needed, review and adjust the remaining information about the opportunity.

## Managing Quotes, Sales Orders, and Invoices

This section contains step-by-step instructions related to managing quotes, sales orders, and invoices in MYOB Acumatica.

### Creating a Sales Order

1. Open the Sales Orders (SO301000) form.

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|  | To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New**. |
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1. Click **Add New Record** on the form toolbar and in the Summary area, do the following:
   1. Select **SO** (Sales Order) as the order type.
   2. Select the customer in the **Customer** box.
   3. Check the date of the order in the **Date** box.
   4. In the **Requested On** box, specify the date when the customer wants to receive the order.
   5. In the **Description** box, provide a brief description for this sales order.
2. On the **Shipping** tab, do the following:
   1. Check the date when the system schedules the shipment of this order in the **Sched. Shipment** box. By default, it is the Requested On date minus the lead days for this customer, if this is setup against the customer.
   2. Review the default shipping rule used for this customer in the **Shipping Rule** box. If needed, select another rule.
3. On the **Details** tab, perform the following steps to add one item or multiple items to the sales order:
   1. Click **Add Items** on the table toolbar. The Inventory Lookup dialog box appears with a list of active stock items.
   2. In the line or lines with the items that you want to add, in the **Qty. Selected** column, specify the requested quantity of the items (measured in the default unit of measure shown in the UOM column). Check the item availability data (which appears in the columns to the right) for the selected warehouse and ensure that the specified quantity is available in the selected warehouse for each item added to the sales order.
   3. Click the **Add & Close** button at the bottom of the dialog box.
   4. In the added line or lines, do the following:
      1. Review the shipping rule in the **Shipping Rule** column. If needed, select another rule for particular item.
      2. Review the date in the **Requested On** column. By default, it is the Requested On date specified for the order. If needed, change the date for this item and if it complies with the line's shipping rule.
      3. Review the date in the **Ship On** column. By default, it is the Sched. Shipment date. Change the date for this item if needed.
4. If needed, allocate specific items for this sales order in the **Line Details** tab.
5. If needed, specify **lot or serial numbers** for specific items for this sales order.
6. Click **Save** on the form toolbar to save the created order.

### Creating a Sales Order with Allocations

1. Open the Sales Orders (SO301000) form.

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|  | To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New**. |
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1. Click **Add New Record** on the form toolbar, and in the Summary area, specify the following:
   1. In the Order Type box, select **SA** (Sales Order with Allocation) as the order type.
   2. In the **Customer** box, select the customer.
   3. If a particular project associates with this sales order, select the needed project in the **Project** box (where the X (Non-Project Code) appears by default).
   4. Change the date of the sales order in the **Date** box, which by default is the current date, if needed.
   5. In the **Requested On** box, specify the date when the customer wants to receive the order.
   6. In the **Customer Order** box, enter the reference number of the original customer document that the sales order references.
   7. In the **External Reference** box, enter the reference number of the sales order that the third-party application imported.
   8. In the **Description** box, enter a brief description for this sales order.
2. On the **Shipping** tab, do the following:
   1. Review the date when the system schedules the shipment of this order in the **Sched. Shipment** box. By default, it is the Requested On date minus the lead days for this customer. Change the date if needed.
   2. Review the default shipping rule used for this customer in the **Shipping Rule** box and change it if needed.
3. On the **Details** tab, perform the following steps to add one item or multiple items to the sales order with allocation:
   1. Click **Add Items** on the table toolbar. The **Inventory Lookup dialog** box appears with a list of active inventory items.
   2. In the line or lines with the items that you want to add, in the **Qty. Selected** column, specify the requested quantity of the items (measured in the default unit of measure shown in the UOM column). Notice the item availability data for the selected warehouse, which appears in the columns to the right.
   3. Click **Add & Close** at the bottom of the dialog box.
   4. In the added line or lines, review the following information:
4. Review the **shipping rule** for the line. If needed, select another rule for this item.
5. Review the date in the **Requested On** column. By default, it is the Requested On date specified for the order. Change the date for this item and if it complies with the line's shipping rule.
6. Review the date in the **Ship On** column. By default, it is the Sched. Shipment date. Change the date if needed for this item.
   1. Click **Save** on the form toolbar.
7. If needed, select the order line on the **Details** tab and click the **Item Availability** button on the table toolbar to review how the system allocates the quantities of the items for the order in the Inventory Allocation Details (IN402000) form, which opens.
8. Specify lot or serial numbers for **lot- or serial-tracked items**, if any.
9. Click **Save** on the form toolbar.

### Creating a Quote from an Opportunity

1. Open the Opportunities (CR3040PL) form.
2. On the appropriate filter tab, click the **opportunity** based on which you want to create a quote. The Opportunities (CR304000) form opens.
3. On the form toolbar, click **Create Quote**.
4. In the **Create Quote** dialog box, which opens, do the following:
   1. In the Quote Type box, select **Sales Quote**.
   2. Select the **Recalculate Prices** check box if you want the system to recalculate the prices and discounts for the quote.
   3. Click **Create and 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 stock items, which it has copied from the opportunity. Review and adjust the data on the form if needed.

1. Click **Save** on the form toolbar.

### Creating a Sales Order from an Opportunity

1. Open the Opportunities (CR3040PL) form.
2. On the appropriate filter tab, click the **opportunity** based on which you want to create a sales order. Make sure that the opportunity has the New, Open, or Won status.

The Opportunities (CR304000) form opens.

1. On the More menu (under Record Creation), click **Create Sales Order**.
2. In the Create Sales Order dialog box that opens, do the following:
   1. In the Order Type box (the Sales Order group of settings of the Main tab), select **SO**.
   2. Select the **Recalculate Prices** check box if you want the prices to be recalculated for the new sales order.
   3. Select the **Recalculate Discounts** check box to recalculate the discounts for the new sales order.
   4. If the user selects a **business account** with the Business Account type in the opportunity, the system displays the Customer group of sections on the Main tab of the dialog box.
   5. Notice the default values of the **email address and customer class** for the customer that you will create based on the business account and change the values if needed.
   6. On the **Attributes** tab of the dialog box, which is shown only if the selected business account has not been extended as a customer, specify any missing values or update values for the attributes (if any).
   7. On the **User-Defined Fields** tab of the dialog box, which is shown only if the selected business account has not been extended as a customer, specify any missing values or update values for the user-defined fields (if any).
   8. Click **Create and Review**.

The system closes the dialog box, extends the business account as a customer (if applicable), and opens the Sales Orders (SO301000) form with a new sales order. Make sure that on the Details tab, the lines contain the product data specified on the same tab of the opportunity.

1. On the form toolbar, click **Save and Close**. The system closes the Sales Orders (SO301000) form and returns you to the Opportunities (CR304000) form.
2. On the **Relations** tab, make sure that the system has added a row that holds the summary settings of the newly created sales order.

### Creating an Invoice from an Opportunity

1. Open the Opportunities (CR3040PL) form.
2. On the appropriate filter tab, click the **opportunity** based on which you want to create an invoice.

The Opportunities (CR304000) form opens. Make sure that the opportunity has the New, Open, or Won status.

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|  | Before creating an invoice, you **must** associate the opportunity with a customer account. |
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1. On the More menu (under Record Creation), click **Create Invoice**.
   1. In the Create Invoice dialog box, select the **Recalculate Prices** check box if you want the system to recalculate the prices for the new invoice.
   2. Select the **Recalculate Discounts** check box if you want the system to recalculate the discounts for the new invoice.
   3. Click **Create**. The system closes the dialog box and opens the Invoices and Memos (AR301000) form with a new invoice that contains many of the settings copied from the opportunity. Make sure that on the Details tab, the lines contain the product data specified on the same tab of the opportunity.
2. On the form toolbar, click **Save and Close**. The system closes the Invoices and Memos (AR301000) form and returns you to the Opportunities (CR304000) form.
3. On the **Relations** tab, make sure that the system has added a row that holds the summary settings of the newly created invoice.