
MYOB Advanced

C100_2019.1 – Customer Management Basic

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Customer Relationship Management in MYOB Advanced

Customer relationship management (CRM) systems help business owners organise information to maximise new leads, repeat sales, improve customer service, cut costs, and integrate information from external sources.

In MYOB Advanced, the Customer Management module plays the role of a full-featured CRM system. With the Customer Management module, your marketers can perform the following tasks (see Lessons 3 to 5):

- Import lists of leads of any origin by using import scenarios
- Automatically assign leads for qualification to appropriate employees by using assignment maps
- Keep track of important tasks and activities by using automatic notifications
- Classify leads and contacts in a most meaningful manner by using classes and attributes
- Nurture leads by running marketing campaigns and sending personalised emails in bulk
- Estimate the efficiency of your marketing campaigns by processing email responses

By using the Customer Management module, the Sales Department can perform the following tasks (see Lesson 6 and 7):

- Quickly convert leads to confirmed contacts, prospects, or opportunities
- Classify opportunities by using classes and attributes
- Assign opportunities to appropriate salespersons
- Prepare initial proposals
- Update proposals while negotiating prices and discounts
- Convert contacts to prospect business accounts that can be converted to customers
- Create sales orders and invoices based on opportunities
- Estimate future revenue for each financial period

Finally, the Customer Management module enables support specialists to complete the following tasks (see Lesson 8):

- Register new cases in the system, which includes manual entry and automatic creation of cases as a result of incoming mail processing
- Assign cases to most appropriate specialists
- Process and resolve cases
- Register associated activities
- Release cases, which results in invoicing related customers
- Monitor support efficiency

The Customer Management module is tightly integrated with the General Ledger, Accounts Receivable, Email, and Communication modules. You can also configure its interaction with other modules, such as Distribution, Project Management, Time & Expenses, or Contract Management (see the diagram below).

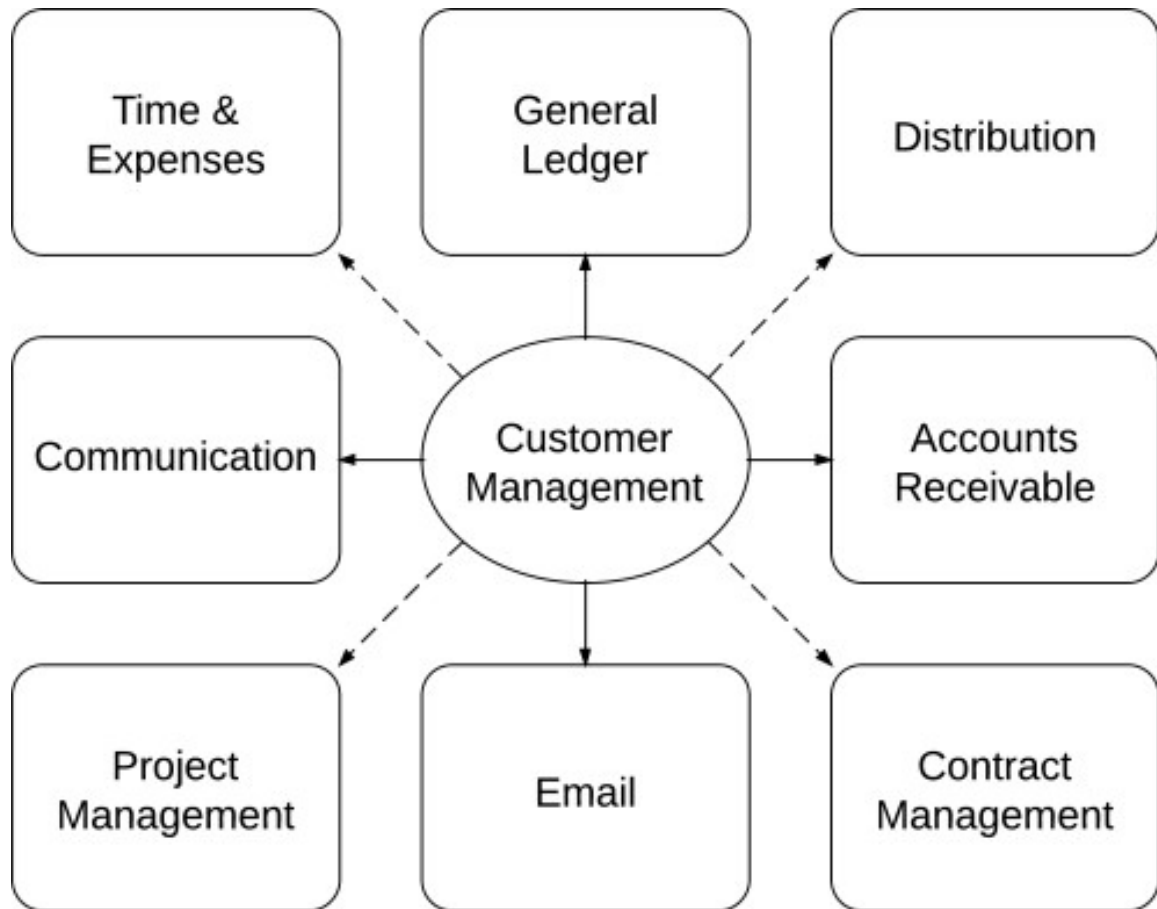


Figure: Customer Management in MYOB Advanced

Part 1: Configuration of MYOB Advanced

In this part, you will learn how the system may be configured so that you can start using the Customer Management functionality in MYOB Advanced. You will learn how to complete the following tasks, which are usually performed by a system administrator:

- Setting up attributes and classes in the Customer Management module
- Creating an assignment map

Step 1.2: Setting Up Opportunity Classes

When an opportunity is processed by a salesperson, it progresses through various stages. At any stage, there is a probability, however low, that the sale can be successfully closed. By having probabilities assigned to the stages of opportunities, you can estimate future sales revenue at any time. The accuracy of revenue estimation heavily depends on the correct identification of the opportunity stage and on the accuracy of the related probability.

An administrator uses the **Stages** tab of the **Opportunity Classes** form (CR209000) to set up opportunity stages and their probabilities. The full list of opportunity stages is available to all opportunity classes. While setting up an opportunity class, an administrator selects the **Active** check box for the opportunity stages that apply to this class and clears this check box for the opportunity stages that do not apply to this class. If the check box is cleared for a stage that has been specified in any opportunity of the class, this stage becomes excluded from the list of available stages for opportunities of the class, but it still will be shown in reports. At least one stage must be active for each opportunity class.

The system offers a predefined list of opportunity stages, but this list seldom reflects the set of stages used in a company. To reflect the sales process established in the company, an administrator can modify the list by adding new stages or removing unnecessary ones, which will affect all existing opportunity classes. For each new stage, the administrator should specify an identifier, name, probability percentage, and sort order.

In this step, you will create two opportunity classes: one for direct sales, and the other for partner sales. For each class, you will define opportunity stages and their probabilities. You will use the *Prospect*, *Nurture*, *Qualification*, *Negotiation*, and *Won* stages, which are predefined, for direct sales opportunities. You will define two new stages for partner sales opportunities.

1. Define an Opportunity Class for Direct Sales

To create an opportunity class for direct sales, on the **Opportunity Classes** form (CR209000; More Items > Opportunities > Preferences (Full Menu)), do the following:

1. On the form toolbar, click Add New Record, and in the Summary area, specify the following settings:
 - **Opportunity Class ID:** DIRECT
 - **Description:** Direct Sales
 - **Internal:** Selected

The **Internal** box indicates that the class is hidden from Self-Service Portal users and only internal users can see and use it.

2. On the Attributes tab, add rows for the following attributes: ORGSIZE and INTERESTED:



When specifying an attribute, you can mark the attribute as required by selecting the **Required** box. If you do, the user must specify a value for this attribute for each new opportunity of the class to save the record.

3. On the Stages tab;
 - a. Make the rows for the *Development*, *Solution* and *Proof* stages in the table.
 - b. For the other stages modify the probability and sort order values as follows.

Name	Probability	Sort Order
<i>Prospect</i>	0	0
<i>Nurture</i>	15	15

Name	Probability	Sort Order
Qualification	50	50
Negotiation	80	80
Won	100	100

c. Make sure that the **Active** box is selected in the rows for the stages above.

2. Save your changes.

2. Define an Opportunity Class for Partner Sales

On the same form, create another class, for partner sales;

- Add a new record and in the Summary area specify the following;
 - Opportunity Class ID:** PARTNER
 - Description:** Partner Sales
 - Internal:** Selected
- On the Attributes tab, add rows for the following attributes: ORGSIZE and INTERESTED.
- On the Stages tab, add rows for two new stages (Proposal Sent and In Trial) to the table, and specify their settings as shown in the screenshot below. Also, make sure that the Active check box is cleared for the Qualification and Negotiation stages. (Although you add these rows to the end of the table, the system then moves them into the order shown below based on their sort order when you save your changes.

Details		Attributes		Stages			
<div><div></div><div></div><div></div><div></div><div></div></div>							
			Active	* Stage ID	* Name	Probability	Sort Order
>			<input checked="" type="checkbox"/>	L	Prospect	0	0
			<input checked="" type="checkbox"/>	N	Nurture	15	15
			<input type="checkbox"/>	Q	Development	20	20
			<input checked="" type="checkbox"/>	O	Proposal Sent	40	40
			<input type="checkbox"/>	V	Solution	40	40
			<input type="checkbox"/>	P	Qualification	50	50
			<input type="checkbox"/>	A	Proof	60	60
			<input checked="" type="checkbox"/>	T	In Trial	65	65
			<input type="checkbox"/>	R	Negotiation	80	80
			<input checked="" type="checkbox"/>	W	Won	100	100

Figure: Opportunity Classes – Stages Tab

4. Save your changes.

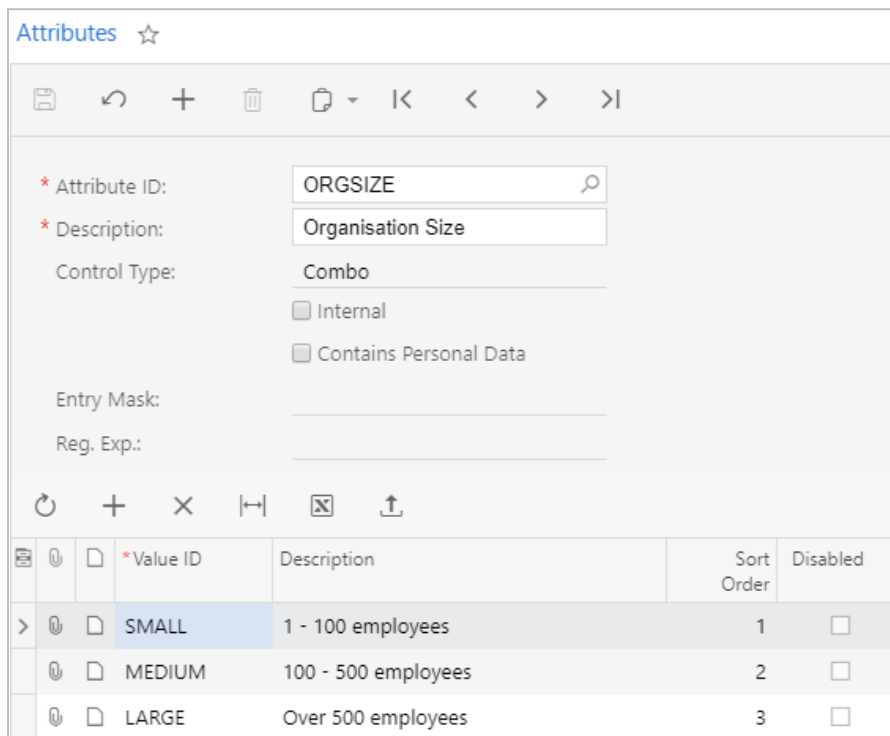
In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. Define attributes that will be used in classes.
2. Define two lead classes.
3. Define two business account classes.
4. Define two opportunity classes.

1. Define Attributes for Lead Classes

To define the attributes that you will use in lead classes, on **the Attributes** form (CS205000); Configuration > Common Settings > Common Settings > Attributes, do the following:

1. Click Add New Record on the form toolbar, and in the Attribute ID box, type ORGSIZE to create an attribute that will describe an organisation's size.
2. For the ORGSIZE attribute, specify the respective values from the details below.
3. Click Save on the form toolbar to save the attribute to the database.



* Attribute ID:	ORGSIZE
* Description:	Organisation Size
Control Type:	Combo
	<input type="checkbox"/> Internal
	<input type="checkbox"/> Contains Personal Data
Entry Mask:	
Reg. Exp.:	

* Value ID	Description	Sort Order	Disabled
SMALL	1 - 100 employees	1	<input type="checkbox"/>
MEDIUM	100 - 500 employees	2	<input type="checkbox"/>
LARGE	Over 500 employees	3	<input type="checkbox"/>

Figure: Attributes form – Organisation Size

Similarly, create the *INTERESTED* attribute, whose values are also shown in the following table.

Attributes ☆

Attribute ID:
INTERESTED

Description:
Interested In

Control Type:
Multi Select Combo

☐ Internal

☐ Contains Personal Data

Entry Mask:

Reg. Exp.:

Value ID
Description
Sort Order
Disabled

BUDGET
Budgeting
1
☐

FORECAST
Forecasting
2
☐

ANALYSIS
Financial Analysis
3
☐

STRATEGY
Financial Strategies
4
☐

RISKMGMT
Financial Risk Management
5
☐

PREAUDIT
Pre-audit support
6
☐

TURNRND
Turnaround management
7
☐

IMPROVE
Performance Improvement
8
☐

OTHER
To follow up
9
☐

Figure: Attributes Form - Interested

The *Combo* control type indicates that you will select an attribute value in a drop-down combo box. With the *Multi Select Combo* control type, you can select multiple values in a drop-down box by selecting check boxes. In the **Sort Order** column, you type the numbers that define the order in which attribute values will be listed in the drop-down combo box. If you do not want to define your own order, leave this column empty—the **Value ID** values will then be displayed in alphabetical order.

Step 1.3: Creating a Lead Assignment Map

In this step, you will create the assignment map that you will use later in the course to automatically assign leads to telemarketing personnel for further processing.

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. The set of conditions used in the specified rules should be complete so that no lead record is left unassigned.

Carefully prepared assignment rules give you the ability to distribute leads among workgroups or individual employees in an almost unlimited number of ways, based on lead properties or attributes. For example, leads can be distributed by location (for instance, leads with post codes starting with 2 go to *Workgroup 1*, leads with postal codes starting with 3 go to *Workgroup 2*, and so on), by source, by the first letter of the company name, or by any other property or attribute; they can be distributed by multiple criteria as well.



If you want to use workgroups in an assignment map, before you start creating the map, make sure that all workgroups involved in the processing of the records are represented on the company tree defined on the **Company Tree** form (EP204061).

To create a lead assignment map;

1. Open the **Assignment and Approval Maps** form (EP205500; More Items > Organisation) and click **Add Assignment Map** on the form toolbar.
2. In the Summary area of the **Assignment Maps** form (EP205010), which opens, specify;
 - **Name:** Lead Assignment Map
 - **Entity:** Leads

Figure: Assignment Map

3. On the toolbar of the **Rules** pane, **Add Rule**.
4. In the **Description** box on the **Conditions** tab, type *Telemarketing 1*, which is the name of the rule.

- **Employee Name:** *Scott Murphy*
5. On the **Conditions** table toolbar, click **Add Row**, and in the row, specify the following settings, which make up the first line of conditions for the first rule:
- **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Equals*
 - **Value:** *Purchased List*
 - **Operator:** *Or*
6. On the table toolbar, again click **Add Row '+'**, and in the row, specify the following settings, which make up the second line of conditions:
- **Entity:** *Lead*
 - **Field Name:** *Source*
 - **Condition:** *Equals*
 - **Value:** *Referral*

These two rows establish the condition, which is the lead source being equal to either *Purchased List* or *Referral*.

Assignment and Approval Maps

← Save & Close [Icon] ↶ + [Icon]

Map ID: [Icon]

Map Name:

* Entity:

Rules

[Icon] + [Icon] [Icon] [Icon] [Icon]

	Seq.	Type	* Name	Jump to	Workgroup	* Wait Time	Assign to	Employee Name
>	1	Assign	Telemarketing 1			0 d 00 h 0...	Murphy Scott Eogha...	Murphy Scot...
	2	Assign	Telemarketing 2			0 d 00 h 0...	Murphy Scott Eogha...	Murphy Scot...

Rule Type:

Conditions

[Icon] + [Icon] [Icon]

	* Entity	* Field Name	Condition	Field Value
>	Lead	Source	Equals	Purchased List
	Lead	Source	Equals	Referral

Figure: Rule 1 Telemarketing 1

7. On the **Rule Actions** tab, add another **Rule**, type *Telemarketing 2*, which is the name of the rule.

- **Employee:** Matthew Sheridan

8. On the toolbar of the **Rules** pane, add a rule using the '+' button:

- **Entity:** *Lead*
- **Field Name:** *Source*
- **Condition:** *Does Not Equals*
- **Value:** *Purchased List*
- **Operator:** *And*

9. On the table toolbar, again click **Add Row**, and in the row, specify the following settings, which make up the second line of conditions:

- **Entity:** *Lead*
- **Field Name:** *Source*
- **Condition:** *Does Not Equal*
- **Value:** *Referral*

These two rows establish the condition, which is the lead source being neither *Purchased List* or *Referral*.

10. Save your changes.

Assignment and Approval Maps

← Save & Close [Icon] ↶ + [Icon] [Icon]

Map ID: [Icon]

Map Name:

* Entity:

Rules

[Icon] + [Icon] × [Icon] ↑ Up ↓ Down [Icon]

	Seq.	Type	* Name	Jump to	Workgroup	* Wait Time	Assign to	Employee Name
	1	Assign	Telemarketing 1			0 d 00 h 0...	Murphy Scott Eogha...	Murphy Scot...
>	2	Assign	Telemarketing 2			0 d 00 h 0...	Murphy Scott Eogha...	Murphy Scot...

Rule Type:

Conditions

[Icon] + [Icon] × [Icon]

	* Entity	* Field Name	Condition	Field Value
>	Lead	Source	Does Not E	Purchased List
	Lead	Source	Does Not E	Referral

Figure: Rule 2 Telemarketing 2

11. Open the **Customer Management Preferences** form (CR101000):

- a. On the **General Settings** tab, in the **Assignment Map** section, select the created map in the **Lead Assignment Map** box and save your changes.

The System will now use this map for the automatic assignment of leads to owners.

When you run the mass assignment process on the Assign Leads form (CR503010), all leads whose source is *Purchased List* or *Referral* will be assigned to Scott Murphy and all leads with the *Other* source will be assigned to Michael Sheridan.

Part 2: Marketing Operations

In this part, you will learn how to use MYOB Advanced to complete the following tasks, which are generally performed by marketing personnel:

- Registering leads manually through the web interface or by using the mobile app
- Classifying leads and contacts by using classes and attributes
- Importing lists of leads of any origin by using import scenarios
- Validating leads for duplicates
- Automatically assigning leads to the appropriate employees by using assignment maps
- Logging communication activities
- Nurturing leads by running marketing campaigns and sending personalised emails in bulk

Lesson 3: Leads and Contacts

MyCompany uses multiple sources of leads, such as purchased lists, lists of web contacts, and phone inquiries. These newly generated leads look like a lot of unsorted records that need to be put in order and somehow classified before being assigned to telemarketers for qualification. Thus, you need a tool which you can use to store all records in a single place and organise them. For these purposes, you can use MYOB Advanced.

First, you register all new leads in the system. In MYOB Advanced, you can do this in any of the following ways:

- Entering leads manually one at a time on the **Leads** form (CR301000) or using the MYOB Advanced On-the-Go app.
- Importing lists of leads (for instance, purchased lists) by using import scenarios on the **Import by Scenario** form (SM206036)
- Importing leads automatically by enabling integration with web services on the **Web Services** form (SM207040)
- Creating leads automatically by activating the functionality of incoming mail processing on the **System Email Accounts** form (SM204002)

In this lesson, you will perform the following tasks:

1. Entering leads manually.
2. Entering contacts through the On-the-Go app.
3. Import a purchased list by using an import scenario.
4. Create a schedule to import on a regular basis lists generated by a marketing automation tool.
5. Validating leads for duplicates.

A marketing tool can generate large lists of leads of rather dubious quality. To minimise the time that you might spend on importing these leads, you will organise the process as follows: Every day, a new list will be uploaded to an ftp server, and then the list will be automatically imported by schedule.

For this task, you will use another predefined import scenario and a list with the *Other* value specified as its source.



Automatically generated lists might contain many duplicate records. If you want to be able to verify imported records for duplicates, you need to use the Duplicate Validation feature, which you can enable on the **Enable/Disable Features** form (CS100000). This feature is outside of the scope of this course.

6. Purging closed duplicates.
7. Discarding leads that are fake or have no contact information.
8. Assigning all new leads to owners.

Lesson Objectives

In this lesson, you will learn how you can register leads that originate from various sources. You will do the following:

- Enter leads manually
- Import a purchased list of leads
- Set up scheduled import of leads generated by a marketing automation tool
- Validate leads for duplicates
- Purge closed leads
- Discard bad leads
- Assign leads to owners.

Import Scenarios

MYOB Advanced provides integration with external data sources and third-party systems through integration services. Integration scenarios, which are a part of MYOB Advanced integration services, are primarily intended for one-time or periodic import or export of data between systems. In this course, you will use import scenarios for importing lists of leads that have been purchased and that have been generated by a marketing automation tool.

Import Scenarios

To upload data to MYOB Advanced, you can use import scenarios, which define the data import instructions for the system.

An import scenario is a sequence of actions to be executed for a data record as if you are manipulating the record through an MYOB Advanced form. When you enter data into the system manually, you perform a sequence of actions. You open the needed data entry form and start entering data. To add a new record, you use the UI elements one by one—that is, you type text, select values in combo boxes, clear or select check boxes, and click buttons. In the corresponding import scenario, you compose the same sequence of actions, specifying a command for each user action on the form. Because you cannot perform multiple actions simultaneously on the form, the scenario executes commands successively. To construct an import scenario, you reflect the actions you make on the form in the sequence of commands for the scenario.

Data Providers

By using import scenarios, you upload data from an external system or file to MYOB Advanced. You must define the format of the external system or file. For this purpose, you set up a data provider in the system. A data provider is an entity that defines the structure of the external data source; MYOB Advanced then uses the data provider to transfer data from the external system or file.

When you're creating an import scenario, you first create the needed data provider, which defines the type and schema of the data source. For example, the type can be an Excel file, and the schema of an Excel data source consists of the names of the spreadsheets that should be used for data import and the list of columns on the spreadsheets. If the external data source has changed (for example, if a new column has been added to an Excel spreadsheet), you update the data provider in MYOB Advanced.

After you have prepared the data provider, you define the import scenario, including the scenario mapping. You can construct a scenario for any data entry form. In the scenario, you use internal fields, which are the fields of MYOB Advanced, and external fields, which are defined in the specified data provider. In the scenario, you map internal fields to external fields and specify commands. An integration scenario is specific to the MYOB Advanced form and the external data schema. After the scenario is ready, you can run the import for the scenario to get the result. You can also schedule scenarios to be run, so that you can import data regularly.

Data Import

You can import data from a third-party application or an external file of a specific type to MYOB Advanced, or you can perform periodic data synchronisation—that is, update or delete data in the existing records—with the data of a third-party application.

When you import data from an external file or system, the specified data provider identifies objects in the prepared external data and finds the fields defined in the data schema of the provider. For example, for an Excel source file, objects correspond to sheets, and fields correspond to columns. Then the data provider executes the import operation according to the selected scenario. It copies the data from the external fields to the specified fields of the MYOB Advanced object. As a result of the import operation, the external data is available in MYOB Advanced.

MYOB Advanced On-the-Go

The MYOB Advanced On-the-Go is a mobile client of MYOB Advanced that you can use to perform basic operations in MYOB Advanced from your mobile device, including adding contacts and business accounts, handling support cases, creating tasks, and following events. The mobile app connects to your MYOB Advanced instance in real time. Changes made in the mobile app are immediately reflected in MYOB Advanced, and changes made in MYOB Advanced immediately become visible in the mobile app.

The mobile app includes app forms, which are versions of MYOB Advanced forms that have been mapped to be used on mobile devices. On an app form, you can work with documents or other records presented in list view or form view.

In list view, an app form displays a list of documents or records that are filtered by type or by another built-in criterion. You can open any listed document or record for editing in form view by tapping its description. Also, you can initiate the creation of a new document or record by tapping the floating Add Record button. The app opens the new document or record in form view.

In form view, an app form displays all the elements of a document or record. If the form in MYOB Advanced that corresponds to the app form has any tabs, they appear in the app form as links to the appropriate information. If the document or record has detail lines, you can view them in list view by tapping the **Details** (or **Document Details**) link, and you can tap any detail to view its element values in form view. A floating Save button is available in form view when you are editing an existing document or record or creating a new one.

The MYOB Advanced On-the-Go app is available for Android and iOS devices. The app functionality is identical across the platforms.

MYOB Advanced Add-In for Outlook

The MYOB Advanced add-in for Outlook processes the incoming and outgoing mail in your Outlook mailbox and searches for the leads, contacts, and employees in MYOB Advanced that correspond to the sender and recipient addresses in the emails. With this add-in, you can do any of the following:

- View the details on the lead, contact, and employee records that already exist in MYOB Advanced
- Create new leads and contacts, as well as opportunities and cases associated with existing contacts, right from your mailbox
- Log your communication activities
- Customise the appearance of the MYOB Advanced ribbon button in Outlook in accordance with your company's branding

Before You Begin

To install the add-in, you must use a manifest file that contains all the deployment instructions. The system generates a manifest file individually for each user. Before you begin installing the add-in, you need to sign in to your MYOB Advanced instance, and on the **Email Settings** tab of the **User Profile** form (SM203010), you click the *Download Outlook Add-in Manifest* link to download the add-in manifest file.

To Install the Add-In

To install the add-in, you need to sign in to your mailbox at Outlook on the Web and upload the add-in manifest. In Outlook on the Web;

1. Click Settings > Manage add-ins > Add from a file.
2. Specify the location of the add-in manifest file, and then click **Next** to confirm the selection.
3. Click **Install**.

The installation of the add-in starts automatically.

When the add-in is installed, the MYOB Advanced ribbon button is created in Outlook (The button is available both in the desktop client and in Outlook on the Web.) You use this button to activate the add-in.

To Sign In

To certify your identity when using the MYOB Advanced add-in, you provide your credentials (user name and password of your MYOB Advanced account) to sign into your MYOB Advanced instance. On the Welcome screen that appears when you activate the add-in;

1. In the **My Username** and **My Password boxes**, type your user name and password.
2. In the **Company** box, select the company to which you want to sign in.
Note that this box is available only if you have multiple companies.
3. Click Sign In.

This allows the add-in access to your MYOB Advanced instance. You do not have to enter your credentials during a subsequent run of the add-in unless you previously signed out.

Step 3.1: Registering Leads Manually

In this step, you will manually create five lead records. Two of these leads have discovered MyCompany through a referral, and three leads have been generated by a phone inquiry.

1. Create Leads in MYOB Advanced

- On the **Leads** form (CR3010PL), click '+' to add a new record. The **Leads** (CR301000) data entry form opens.
- On the **Details** tab, update the data related to each of the leads shown in the table below and save your changes after each record is completed.

	Lead #1	Lead #2	Lead #3
Title	Mr	Mrs	Mr
First Name	John	Andrea	Lesley
Last Name	Klunny	Tinkler	Killan
Company Name	Advogent Group Ltd	United Utilities Networks Ltd	Airgas Pty Ltd
Email	jkunlunny@advogent.com.au	atinkler@uun.com	lkillan@airgas.com
Source	Referral	Referral	Phone Inquiry
Country	AU	AU	AU
Industry	Entertainment & Media	Advertising, Branding & Marketing	Construction
Interested In	Performance Improvement	Financial Strategies	Budgeting

Now, all these leads have a status of *New* and the reason set to *assign*—this means that the leads are ready to be assigned to owners for qualification.

2. Create a Lead By Using the MYOB Advanced Add-In

To create a new lead by using the add-in, do the following:

- Sign in to your account in Outlook for the Web, and select an email.
- Click the MYOB Advanced ribbon button.
- In the add-in, click Create Lead.
The **Contact Information** group of elements appears on the form.
- Optional: In the Position box, type the lead's job title or position.
- Optional: In the Account box, select the business account that will be associated with the lead.



We recommend that you specify a business account of the customer type for any new lead. If you do not do so, then you may be unable to later create a case associated with this lead because the case class that you specify for the case may require a customer.

- Optional: In the Company Name box, type the business name of the lead's company.
- Optional: In the Source box, select the source of the lead, which can be one of the following: *Web*, *Phone Inquiry*, *Referral*, *Purchased List*, or *Other*.
- In the Country box, select the country of the lead.

9. Click Create Lead to submit the specified information.

By doing the above, a new lead is created in MYOB Advanced; the first and last name and the email address of the email sender or recipient are transferred to the created record. If your user account is associated with an employee, this employee is assigned as an owner to the newly created lead.

Step 3.2: Importing a Purchased List

In this step, you will configure an import scenario to import a purchased list of leads. To prepare an import scenario, you create a data provider and configure the import scenario mapping.

To import records using an import scenario requires three steps to be completed.

- Set up Data Providers
- Configure Import Scenario
- Import records using Import By Scenario.

Before You Begin

Find the *PurchasedLeads.xlsx* file that is provided with this course.

Import a Purchased List

On the **Import by Scenario** form (SM206036; More Items > Integration > Transactions);

1. In the **Name** box select **Import Leads from Purchased Leads**.
2. On the form toolbar, click **Files** and upload the *PurchasedLeads.xlsx* file, then close the **Files** dialogue box.
3. On the form toolbar, click **Prepare**.

The table on the **Prepared Data** tab becomes populated with the data from the uploaded file, with each row corresponding to a lead. In the Summary area of the form, in the **Number of Records** read-only box, you can see the total number of listed records. In the Summary area, notice that the system has changed the status of the scenario to *Prepared*.

If needed, you could exclude certain records in the list from import by clearing the boxes in the **Active** column for these records.

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

A green check mark appears on the form toolbar when the process is successfully completed, and the imported records are marked by selected check boxes in the **Processed** column of the grid. The system changes the status of the scenario to *Processed*.

All the imported records have their source specified as *Purchased List*.

Step 3.3: Importing Lists Generated by a Marketing Automation Tool

In this step, you will schedule periodic execution of a predefined import scenario to import on a regular basis lists generated by a marketing automation tool. In MyCompany, an updated list is uploaded to an ftp server every day; you will imitate this process by putting the *MarketingLeads.xlsx* file that is provided with this course in a shared folder on your local machine. You will perform the following tasks, each of which is described in detail in the following sections:

1. Configure synchronisation between an existing file that contains a list of leads and an external file that will be regularly updated by the marketing automation tool used by MyCompany.
2. Schedule periodic execution of the import scenario.

1. Configure File Synchronisation

Before you begin, put the *MarketingLeads.xlsx* file in a shared folder on your local machine.

1. Open the **Import by Scenarios** form (SM206036)
 2. In the **Name** box, select **Import Leads from Marketing**
 3. On the form toolbar, click **Files** and upload the *MarketingLeads.xlsx* file
 4. After the file has been successfully uploaded, click **Edit** in the row where the file is listed.
- The File Maintenance form (SM202510) opens.

5. On the **Synchronization** tab of this form, specify the following settings and save your changes:

- **Synchronize:** Selected
- **Synchronization Type:** Shared Folder
- **Path:** Network path to the *MarketingLeads.xlsx* file.
- **Login:** Your network login <username>@<domain>
- **Password:** Your network password
- **Synchronize Folder Content:** Cleared



You will not be able to setup and test synchronisation into a local instance of MYOB Advanced. These steps are to assist you when you are configuring a cloud site.

6. Click **Synchronization > Import File**.

A green check mark appears on the form toolbar when the synchronisation process has been completed successfully.

2. Schedule Lead Import

1. Open the **Process Import Scenarios** form (SM206035; More Items > Integration > Processes (Full Menu))
2. In the Selection area, in the **Operation** box, select **Prepare & Import**.
3. In the table, select the **Import Leads from Marketing** scenario.
4. On the form toolbar, click **Schedule >Add**.

The **Automation Schedules** form (SM205020) opens in a pop-up window.

5. In the Summary area of this form, specify the following settings;
- **Screen ID** *Process Import Scenarios*
 - **Description:** *Import Leads from Marketing*

- **Active:** Ticked.
- **Action Name:** Process All

6. In the **Details** tab, specify the following settings;

- **No Execution Limit:** Ticked
- **Starts On:** Current date
- **No Expiration Date:** Ticked

7. On the **Schedule** tab, specify the following settings;

- **Schedule Type:** *Daily*
- **Next Execution Date:** Current date
- **Every:** 1 Day(s)

Save your changes.

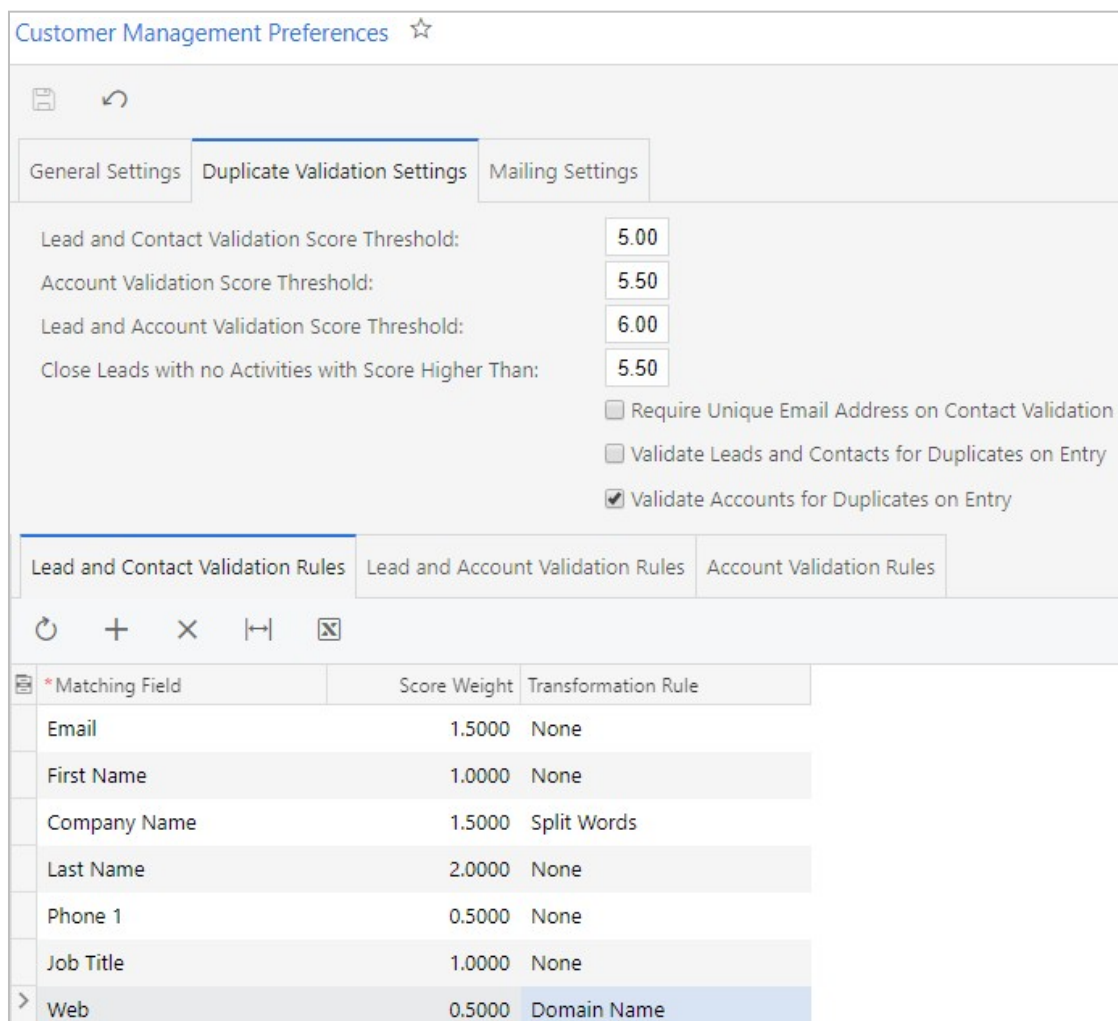
Step 3.4: Validating Leads for Duplicates

Because you have imported large batches of new records from different sources, some of these records may be duplicates. In this step, you will validate the imported leads for duplicates. You will perform the following tasks, each of which is described in detail in the corresponding sections below:

1. Review the duplicate validation settings of the training instance
2. Calculate grams (weight) for all records of the type that you want to validate
3. Validate all new leads for duplicates
4. Merge duplicates

1. Review Duplicate Validation Settings

Before you proceed, do the following on the **Customer Management Preferences** form (CR101000; More Items > Marketing > Preferences (Full Menu) to review and modify the duplicate validation settings, as shown in the screenshot below:



Customer Management Preferences ☆

General Settings Duplicate Validation Settings Mailing Settings

Lead and Contact Validation Score Threshold: 5.00

Account Validation Score Threshold: 5.50

Lead and Account Validation Score Threshold: 6.00

Close Leads with no Activities with Score Higher Than: 5.50

☐ Require Unique Email Address on Contact Validation

☐ Validate Leads and Contacts for Duplicates on Entry

☒ Validate Accounts for Duplicates on Entry

Lead and Contact Validation Rules Lead and Account Validation Rules Account Validation Rules

⌂ + × ⇄ ✕

* Matching Field	Score Weight	Transformation Rule
Email	1.5000	None
First Name	1.0000	None
Company Name	1.5000	Split Words
Last Name	2.0000	None
Phone 1	0.5000	None
Job Title	1.0000	None
> Web	0.5000	Domain Name

Figure: Customer Management Preferences - Duplication Validation Settings

1. On the **Lead and Contacts Validation Rules** tab, review the rules according to which the validation score will be calculated for each validated record, and add a row with the following settings specified:
 - **Matching Field:** Job Title
 - **Score Weight:** 1.0000

- **Transformation Rule:** None

In the **Matching Field** column, all the elements are specified whose values will be compared during the verification process. For each, the score weight indicates the share that the element contributes to the validation score if the values match. The total validation score of a pair of compared records is calculated as the sum of the weights of the elements whose values match.

2. In the Summary area, review the following settings:

- **Lead and Contact Validation Score Threshold:** 5
- **Validate Leads and Contacts for Duplicates on Entry:** Cleared

The system will compare the validation score against the threshold value to determine whether the compared records are possible duplicates.

2. Calculate Grams (Weight)

Grams are used for the calculation of validation scores. You cannot use the duplicate validation feature if you have not calculated grams for all records of the type that you want to validate.

The system calculates grams for all new records on entry; so, grams have already been calculated for all imported leads. Modification of the validation rules resets the previously calculated values. Because you have just modified the lead validation rules, you need to recalculate grams for leads.

On the **Calculate Grams** form (CR503400; More Items > Marketing > Processes (Full Menu)), click **Process All** to calculate grams for all listed records.

3. Validate Leads for Duplicates

1. On the **Validate Leads and Contacts** form (CR503410; More Items > Marketing > Processes (Full Menu)), select the **Validate All Records** to check records for possible duplicates.

2. Make sure the **Close Leads with No Activities** is unticked and then **Process All**.

None of the imported leads has associated activities, if you selected the **Close Leads with No Activities**, any possible duplicate found would be closed automatically if the validation score for this duplicate is above the threshold specified in the **Closing Threshold** box.

3. To view possible duplicates in the **Processing** window, click on the **Processed** tile once validation is completed:
 - Click the **Duplicate** column header and create a filter to view only the records with the *Possible Duplicate* status. This can also be viewed from the Leads form (CR3010PL) by creating a new filter.

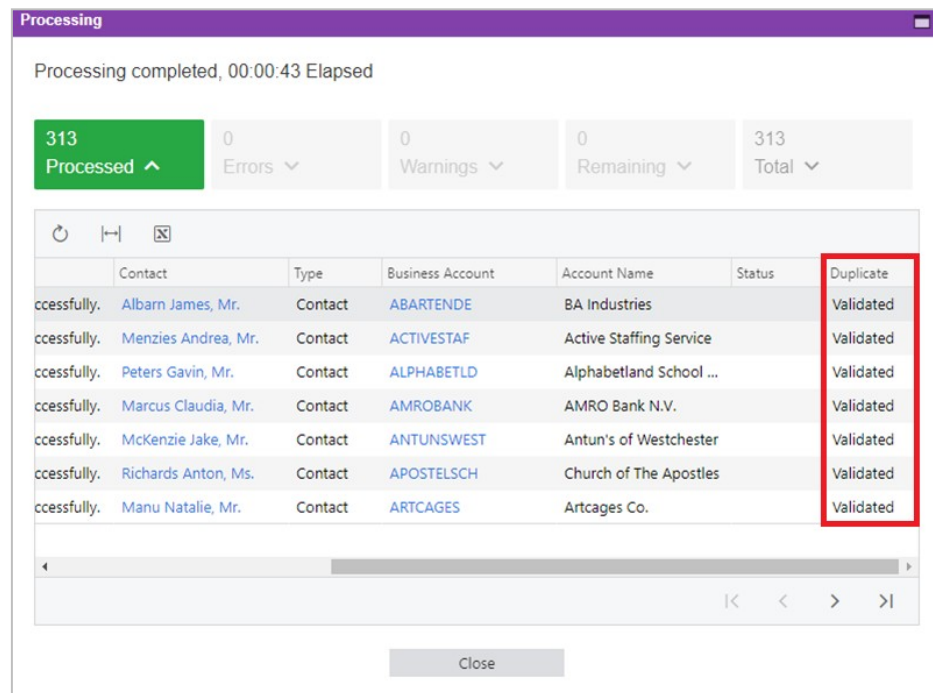


Figure: Filtering Processed Records

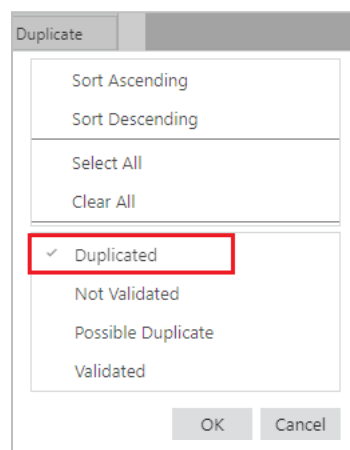


Figure: Creating a filter on Duplicate Records

- To see if possible duplicates have been found, find the record on the **Leads** form (CR3010PL) and open it.

4. Merge Duplicates

If possible duplicates have been found for a lead record, the **Duplicates** tab appears on the **Leads** form (CR301000) for this lead. On this tab, you can merge duplicates into one record by using the merge wizard

1. On the Duplicates tab, select the unlabelled box for the possible duplicate and click Merge on the toolbar.
2. The **Please Resolve the Conflicts** dialogue box opens. In the dialogue box:
3. In the **Target** box, select the record that is to remain as the original record and then **OK**.

Name	Value
First Name	Kate
Workgroup	
Owner	EP00000002

Figure: Resolving Conflicts – Duplicate Leads

The duplicate record is closed, and its status is set to *Lost* with the reason set to *Duplicate*.

Step 3.5: Purging Closed Leads

Purging closed duplicate leads will help keep the list of leads in the system "clean," so that when employees are processing a record, they won't confuse it with its duplicates.

On the **Purge Leads and Contacts** form (CR508000; More Items > Marketing > Processes (Full Menu)):

1. In the Summary area, make sure that the **Purge Unconverted Leads that Are Older than x Months** and **Purge Inactive Contacts with No Activities for More than x Months** boxes are cleared.
2. Select the **Purge Closed Contacts and Leads** box.
Only leads with the *Lost* status remain listed in the table.
3. On the form toolbar, click **Process All**.


When the processing has completed, all the listed leads have been deleted from the system. Note that if you have a closed lead that has at least one associated activity, this lead is not deleted during the purging process—the system only marks it as inactive.

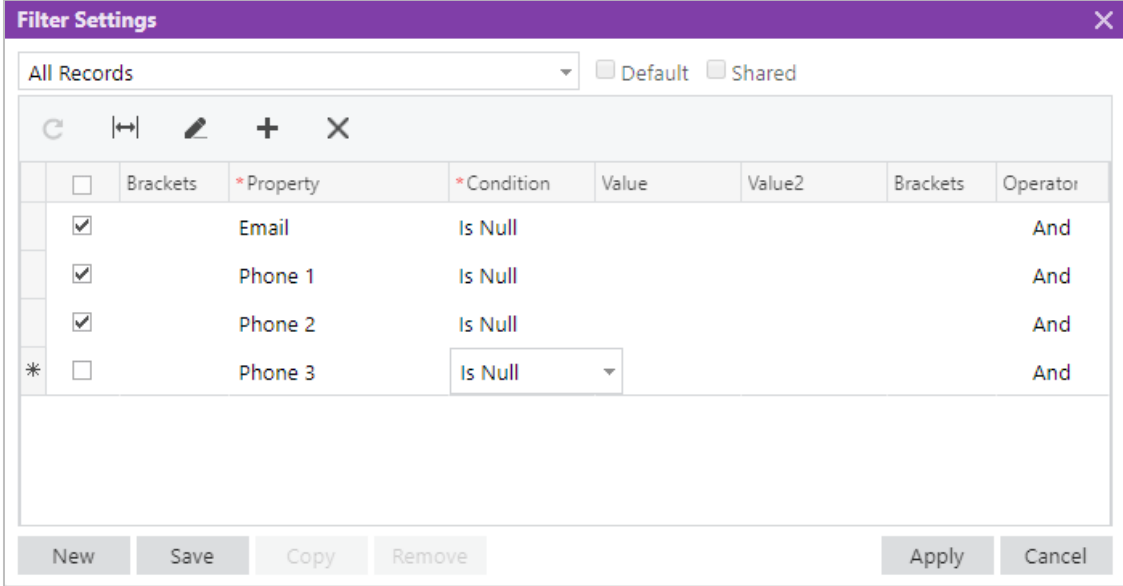
Now the leads with the *New* status and the reason set to *Assign* on the **Leads** form (CR301000) are ready to be assigned to owners for qualification.

Step 3.6: Discarding Leads with Insufficient Contact Information

Discarding imported leads that have neither email addresses or phone numbers can be completed in bulk.

On the **Update Leads** form (CR503020):

1. Click the filter button  from the tool bar. In the records in the Filter Settings dialogue box.



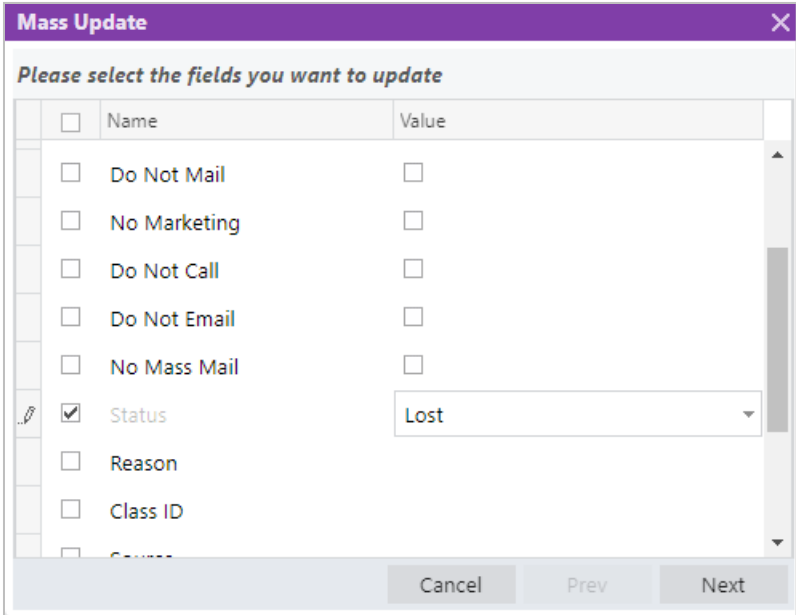
The Filter Settings window shows a table with filter criteria. The table has columns: Brackets, *Property, *Condition, Value, Value2, Brackets, and Operator. The criteria are as follows:

Brackets	*Property	*Condition	Value	Value2	Brackets	Operator
<input checked="" type="checkbox"/>	Email	Is Null				And
<input checked="" type="checkbox"/>	Phone 1	Is Null				And
<input checked="" type="checkbox"/>	Phone 2	Is Null				And
* <input type="checkbox"/>	Phone 3	Is Null				And

Buttons at the bottom: New, Save, Copy, Remove, Apply, Cancel.

Figure: Filter Settings Window

2. Save your filter. Enter a new filter name *Leads to Discard* and OK to close the dialogue box, then select **Shared** to and **Apply** to save the reusable filter. The filter is applied and leads meeting the criteria are listed in the table.
3. On the toolbar, click **Process All**. This will open the **Mass Update** dialogue box.
4. Select the **Status** field and change the **Value** to *Lost*. Click **Next**.



The Mass Update window shows a list of fields to update. The fields are: Name, Do Not Mail, No Marketing, Do Not Call, Do Not Email, No Mass Mail, Status, Reason, Class ID, and Source. The Status field is selected, and its value is set to Lost.

	Name	Value
<input type="checkbox"/>	Name	
<input type="checkbox"/>	Do Not Mail	<input type="checkbox"/>
<input type="checkbox"/>	No Marketing	<input type="checkbox"/>
<input type="checkbox"/>	Do Not Call	<input type="checkbox"/>
<input type="checkbox"/>	Do Not Email	<input type="checkbox"/>
<input type="checkbox"/>	No Mass Mail	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Status	Lost
<input type="checkbox"/>	Reason	
<input type="checkbox"/>	Class ID	
<input type="checkbox"/>	Source	

Buttons at the bottom: Cancel, Prev, Next.

Figure: Mass Update Window

A green check mark appears on the processing window when the process has completed successfully. A small green check mark also appears for each row in the grid to indicate that the record has been processed successfully.

Step 3.7: Assigning Leads to Owners

In MYOB Advanced, an owner is an employee who has been assigned to a record and is responsible for its processing. In our case, lead owners are telemarketing employees whose primary task is to verify lead information.

To make the assignment process fast and reliable you can split the proves into consecutive routines:

1. Setting up email notifications so that an owner will receive a notification by email when assigned to a lead.
2. Assigning leads in build by using an assignment map.
3. Making sure no leads have been left unassigned.

1. Set Up Email Notifications

Each time an employee is assigned to a new lead, a notification will be sent to the owner by email:

1. On the **Automation Notifications** form (SM205040; More Items > System Management > Email Preferences (Full Menu)), create a new record using the '+' button on the toolbar using the below configuration:

- **Screen ID:** *Leads (Company > Organisation > Customer Management > Work Area > Leads)*
- **Description:** *New Lead Owner Assigned*
- **Active:** *Selected*
- **Public:** *Cleared*
- **Subject:** *You have been assigned to a new lead.*
- **Data Source:** *None*

2. On the **Message** tab add:

Dear ((Lead.OwnerID)),
 You have been assigned to a new lead: ((Lead.DisplayName))
 Lead Source: ((Lead.Source)).
 Please start processing this lead.
 Thanks,
 [Your name]

The owner will see this message in the body of the notification email, with relative data automatically specified in place of placeholders.

3. On the **Conditions** tab add:

- **Active:** *Selected*
- **Field Name:** *Owner*
- **Condition:** *Is Not Null*

4. On the **Addresses** tab:

- **Active:** *Selected*
- **Source:** *Document*

- **Email:** *Owner->Default Contact->Email*
5. On the **Fields** tab:
 - **Active:** *Selected*
 - **Field Name:** *Owner*
 6. Save your changes.
 7. Open the **Send Notifications** form (SM205050). you will have to add this to your menu or just enter the screen ID SM205050 into the *Search....* field at the top of the screen.
 8. Add a **schedule** from the toolbar and on the **Automation Schedules** form (SM205050) configure a schedule for the periodic sending of notifications.

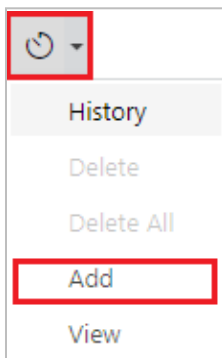


Figure: Adding a schedule

2. Assign Leads by Using an Assignment Map

To assign leads to owners by using the lead assignment map that you created earlier, open the **Assign Leads** form (CR503010; More Items > Marketing > Processes) and;

1. Click the **All Records** filter tab.
2. In the table, click the header of the **Owner** column and select the *Is Null* filter condition then OK.
3. On the form toolbar, click **Process All**.

If you have a large list of leads, the processing can take a considerable amount of time.

A green check mark appears on the form toolbar when the process has completed successfully. A small green check mark also appears for each row in the grid to indicate that the record has been processed successfully.



In case the assignment map has not been configured properly, this might result in errors during the Assign Leads process and the lead owners might not get updated for these records. In this case, you can update the assignment map configuration to handle the given error and run the assignment process again for the errored records.

Lesson Summary

In this lesson, you have learned the basics of registering leads in the system. You have learned how to perform such essential procedures as importing leads in bulk by using import scenarios and registering leads manually. Also, you have learned how to automate the import of leads generated by a marketing automation tool and how to validate the imported records for duplicates. Finally, you have learned how to use assignment maps to assign leads to owners for further processing

Lesson 4: Emails, Events, Tasks and Activities

Marketing employees need to communicate with the leads that are assigned to them to confirm their contact information, introduce products and services to them, and gather any valuable information that may help in building the relationship between the company and its potential customers. To keep track of communication activities in MYOB Advanced, users can create tasks, events, emails, and activities of various types. If a task, event, email, or activity is created on the **Activities** tab of the **Leads** (CR301000), **Contacts** (CR302000), **Business Accounts** (CR303000), **Opportunities** (CR304000), **Cases** (CR306000), **Marketing Lists** (CR204000), or **Marketing Campaigns** (CR202000) data entry form, this task, event, email, or activity becomes associated with the corresponding entity. Also, an email can be associated with an entity through the MYOB Advanced add-in for Outlook.

In this lesson, you will create an email, a task, an event, and a phone call activity associated with a lead.

Lesson Objectives

In this lesson, you will learn which tools you can use to log your communication activities in MYOB Advanced. You will cover the following tasks:

- Creating an email, a task, and an event
- Associating an email with a lead by using the Acumatica add-in for Outlook
- Creating a phone call activity

Step 4.1: Creating an Email

To keep track of all work that is related to a lead, the lead owner should create activities. In MYOB Advanced, an activity is something you do that relates to an entity (in this case, to a lead), with which the activity record becomes associated in the system. Activities can be of various types, such as emails, phone calls, and notes. Events and tasks can also be regarded as specific activities

In this step, you will see how to:

1. Create an email activity associated with a lead.
2. Log an existing email activity by using the MYOB Advanced add-in for Outlook.

1. Create an Email

To create an email activity associated with a lead:

1. On the **Leads** form (CR3010PL), double click the lead you want to send an email.
2. On the **Leads** form (CR301000), which opens, click the **Activities** tab.
3. On the table toolbar, click **Add Email**.

The **Email Activity** form (CR306016) opens in a pop-up window. The default system email address is specified in the **From** box and the lead's email address is specified in the **To**.

4. In the **Subject** box and **Message** tab update information you wish to send to the lead. Once you are happy with the email then **Send**.

2. Log an existing email activity by using the MYOB Advanced add-in for Outlook

To associate an email with the corresponding record and store it as an email activity in MYOB Advanced:

1. In Outlook for the Web, select an email and click the MYOB Advanced ribbon button.
2. On the add-in form with the contact information displayed, click **Log Activity**. The **Log Activity** group of elements appears on the form.
3. In the **Subject** box, add the subject or leave the subject of the email.
4. Do one of the following:
 - Select the **Contact** check box if you want the email activity that will be created based on this email to be associated with the selected contact.
 - Select the **Case** check box if you want the email activity to be associated with a case, and then select the needed case in the **Entity** box.
 - Select the **Opportunity** check box if you want the email activity to be associated with an opportunity, and then select the needed opportunity in the **Entity** box.
5. In the **Encoding** box, select the encoding used for the selected email, so that the email message will be correctly stored in MYOB Advanced and then click **Create**.

As a result, an email activity is created in MYOB Advanced based on the selected email; this activity is associated with the entity that you have specified.

Step 4.2: Creating an Event

In MYOB Advanced an event is a scheduled occurrence with an associated start time, date, and duration, such as a meeting, conference call, or trade show. You can create events and invite other employees, leads, contacts, or customers to attend them, with invitations sent automatically by email. Also, you can receive notifications about events created by other users.

You can view the events defined in MYOB Advanced by using the **Events** form (EP404100).

In this step, you will see how an event is associated with a lead.

1. On the **Leads** form double-click the lead with whom you want to associate an event.
2. On the **Leads** form (CR301000), which opens, click the **Activities** tab.
3. On the table toolbar, click **Add Event**
4. As a result, the **Event** form (CR306030) opens in a pop-up window
5. On the **Details** tab, specify:
 - Summary
 - Location
 - Start Time
 - End Time.
6. On the **Attendees** tab, add the employees whom you want to invite to the event, and then click **Invite** on the table toolbar. Then **Save & Close**.

Step 4.3: Creating a Task

You can create a new task by using the **Tasks** form (EP404000) or the **Activities** tab of a data entry form. By default, you are the owner of the task that you are creating; however, if needed, you can reassign the task by selecting another employee as the owner.

When you create a task, you can configure a reminder for it and specify on which day before the due date the task owner should receive the reminder. On the specified date, the reminder will appear in the info area of the task owner's MYOB Advanced screen and will be blinking or highlighted in red until either the creator or the owner completes the task or changes its status.

In this step, you will see how a task is associated with a lead.

1. On the **Leads** form double-click the lead with whom you want to associate a task.
2. On the **Leads** form (CR301000), which opens, click the **Activities** tab.
3. On the table toolbar, click **Add Task**
4. As a result, the **Task** form (CR306020) opens in a pop-up window
5. On the **Details** tab, specify:
 - Summary
 - Start Time
 - End Time.
6. Then **Save & Close**.

Step 4.4: Creating an Activity

In this step, you will see how a phone call is associated with a lead.

1. On the **Leads** form double-click the lead with whom you want to associate a task.
2. On the **Leads** form (CR301000), which opens, click the **Activities** tab.
3. On the table toolbar, click **Add Activity > Add Phone Call**
4. As a result, the **Activity** form (CR306010) opens in a pop-up window
5. On this form, create a record and save. An empty Owner box indicates that the activity does not require further processing.
6. In the editor area, type comments about the phone call.
7. Then **Save & Close**.

Lesson Summary

In this lesson, you have learned how you can keep track of communication activities in MYOB Advanced. You have seen how to create an email, an event, a task, and an activity, all of which can be associated with lead records. Also, you have seen how to associate an email with a lead by using the Advanced add-in for Outlook.

Lesson 5: Marketing Lists and Campaigns

Companies need to keep in touch with confirmed contacts that are not yet ready to buy any of the currently offered services but might be interested in future offers (or might change their minds over time). Contacts should be periodically reminded of the company, which includes sending newsletters and promotional emails and running marketing campaigns. The purpose of these activities is to stimulate feedback from contacts and boost their transition to real sales opportunities, or to encourage repeat sales.

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

1. Create a marketing list that will be used as a source of email addresses for the company's mass Emails.

A marketing list is a list of contacts that might share characteristics or form a special audience. You can create as many marketing lists as you need for advertising products and services. Based on a marketing list, you can create mailing lists for mass-mailing of newsletters, special offers, and other information that is sent periodically.

2. Prepare a marketing campaign, which includes defining campaign members.

A campaign is a specific set of marketing activities that are aimed at contacts and undertaken to achieve a marketing goal, such as stimulating demand, boosting name recognition, or generating revenue.

3. Send a mass email to selected contact.

In this lesson, you will prepare and send a mass email to the members of the previously created marketing campaign.

Lesson Objectives

In this lesson, you will see how to automate the nurturing of confirmed contacts by:

- Creating a marketing list
- Preparing a marketing campaign
- Sending a mass email

Step 5.1: Creating a Marketing List

In MYOB Advanced, a marketing list can be configured to be either dynamic or static.

A dynamic marketing list is formed automatically according to a set of rules, which you can define on the **Configuration Options** tab of the **Marketing Lists** form (CR204000); on the same tab, you need to select the **Dynamic List** check box to indicate that the marketing list is dynamic. The rules will be applied to the existing and newly added records, and the records that match the specified criteria will be automatically included in the list.

A static marketing list is created manually. To configure a static marketing list, you need to clear the **Dynamic List** check box and then include records in the marketing list.



You will not be able to send or receive emails or test the connection when logged into a locally configured instance of MYOB Advanced. These steps are included to assist you when you are configuring a cloud site.

In this step, you will perform the following tasks

1. Create a marketing list that will be used for distribution of a company's newsletters.
2. Add members to the marketing list.

1. Create a Marketing List

1. On the toolbar of the **Marketing Lists** form (CR2040PL; More Items > Marketing > Profiles), add a new record by clicking on '+' button from the toolbar.
2. In the Summary area, specify the settings:
 - **Marketing List ID:**
 - **Name:**
 - **Active:** Selected
3. On the **Configuration Options** tab; specify whether the list is to be static or dynamic.

If you wanted the list to be formed automatically, you would select the **Dynamic List** check box. You would specify the selection rules for list members in one of the following ways.



- You leave the **Generic Inquiry** box empty, and on the **Selection Criteria** tab, you specify the necessary filter conditions to select list members from all leads, contacts, and employees that exist in the system
- You specify in the **Generic Inquiry** box a generic inquiry form that lists contact records; then, in the **Shared Filter to Apply** box, you can select a shared filter that is available for the specified inquiry form.

All existing or newly added records that meet these criteria will be included in the list automatically.

4. Save your changes.

2. Add Marketing List Members

To add members to a static marketing list:

- On the **Marketing Lists** form (CR204000), on the table toolbar of the **List Members** tab, click '+' and then add the needed data for the contact in the row. Repeat this for each member to be added to the list.

- Once Saved, click **Add New Members** on the table toolbar of the **List Members** tab to bring up the **Add Members** dialogue box. In this dialogue box, you can select list members from a specific data source, which can be either a different marketing list or a generic inquiry form that lists contact records. You can select any shared filter that is available for the specified inquiry form to be able to select members from only the relevant records.
- On the **Leads** form (CR301000), click '+' on the table toolbar of the **Marketing Lists** tab, and then add the needed data for the marketing list in the row. This adds the selected lead to the marketing list you added to this table. You can repeat this instruction as needed.

On some occasions, you might need to temporarily unsubscribe a contact from a marketing list. If this is the case, you do not have to remove the contact from the list of members; instead, you can do either of the following:

- On the **Marketing Lists** form (CR204000), while you are viewing a marketing list, clear the box in the **Subscribed** column for the contact on the **List Members** tab
- On the **Leads** (CR301000) form, while you are viewing a list member, clear the box in the **Subscribed** column for the marketing list on the **Marketing Lists** tab

To turn the member's subscription back on, you should select the box that you previously cleared on either of these forms.

Step 5.2: Launching a Marketing Campaign




You will not be able to send or receive emails or test the connection when logged into a local instance of MYOB Advanced. These steps are included to assist you when you are configuring a cloud site.

In this step, you will see how to prepare a new campaign in MYOB Advanced by performing the following tasks:

1. Prepare a marketing campaign.
2. Execute the campaign.
3. Review campaign statistics

1. Prepare a Marketing Campaign

To create a marketing campaign, do the following:

1. On the toolbar of the **Marketing Campaigns** form (CR2020PL; More Items > Marketing > Profiles), click the '+' button. The **Marketing Campaigns** form (CR202000) opens.
2. In the Summary area, update the following:
 - **Stage:**
 - **Campaign Class:**
 - **Campaign Name:**
3. On the **Campaign Details** tab, specify the settings:
 - **Start Date:**
 - **End Date:**
 - **Expected Revenue:** An estimate (for instance, 1000000)
 - **Planned Budget:** An estimate (for instance, 10000)
4. Make sure that the **Active** box is selected and Save your changes.
5. Add leads to the list of campaign members in any of the following ways:
 - On the **Members** tab of the **Marketing Campaigns** form (CR202000) click '+' to add a new member. In the row, you then add the needed data for the record. You can repeat this instruction as needed. You can use this method as a quick way of adding specific contacts to a list of campaign members
 - Once saved, on the table toolbar of the **Members** tab, click **Add New Members** to open the **Add Members** dialogue box. In this dialogue box, you can select list members from a specific data source, which can be either a marketing list or a generic inquiry form that lists contact records. You can select any shared filter that is available for the specified inquiry form to be able to select members from only the relevant records.
 - On the **Marketing Campaigns** form (CR202000), on the table toolbar of the **Members** tab, click the button  to upload an Excel file with a list of contacts.
 - On the **Leads** form (CR301000), on the table toolbar of the **Campaigns** tab, click the button '+'. You then add the needed data for the marketing campaign in the row. You can repeat this instruction as needed.



On the table toolbar of the **Members** tab of the **Marketing Campaigns** form (CR202000), you can click the **Add Opportunity** button or the relevant command under the **Add Activity** menu to create an opportunity or an activity, respectively, associated with a lead, contact, or business account listed in the table. The added opportunity or activity will contain a reference to the marketing campaign, which may help you evaluate the effectiveness of the marketing campaign. You are only able to add an opportunity if any members have been added to the campaign.

2. Execute the Marketing Campaign

1. To indicate that the execution of the campaign has started, in the **Stage** box on the Marketing Campaigns form (CR202000), select *Execution*, and save your changes
2. To then indicate that the campaign has completed, select the *Completed* stage, and again save your changes

In MYOB Advanced, as a marketing campaign progresses through stages, you can associate various activities with the campaign or create related leads and opportunities. All leads and opportunities associated with the campaign are listed on the **Generated Leads** and **Opportunities** tabs of the **Marketing Campaigns** form (CR202000). The total numbers of leads and opportunities are displayed in the **Leads Generated** and **Opportunities** boxes on the **Campaign Details** tab of the same form.

3. Review Campaign Statistics

On the **Marketing Campaigns** form (CR202000), review the following statistical information on marketing campaigns

- On the **Campaign Details** tab, review the following values, which cannot be edited but may help you evaluate the effectiveness of an ongoing campaign
 - **Total Members:** The total number of members assigned to the campaign
 - **Members Contacted:** The number of campaign members that have been contacted and have activities associated with them
 - **Members Responded:** The total number of campaign members that have responded to the campaign and have opportunities associated with them
 - **Leads Generated:** The number of leads that have been created due to the campaign
 - **Leads Converted:** The number of leads converted to contacts due to the campaign
 - **Opportunities:** The number of opportunities generated due to the campaign
 - **Won Opportunities:** The number of opportunities related to the campaign that have been eventually won
 - **Opportunities Value:** The total amount of the opportunities related to the campaign
 - **Won Opportunities Value:** The total amount of the won opportunities related to the campaign
- On the **Members** tab, review the number of opportunities, activities, and emails that are related to the selected campaign and associated with each campaign member.
- On the **Generated Leads** and **Opportunities** tabs, review lists of all leads and opportunities that have the selected marketing campaign specified as their source campaign

Step 5.3: Sending a Mass Email



You will not be able to send or receive emails or test the connection when logged into a local instance of MYOB Advanced. These steps are included to assist you when you are configuring a cloud site.

In this step, you will prepare and send a mass email to the members of a marketing campaign. Do the following:

1. On the toolbar of the **Mass Emails** form (CR3080PL; More Items > Marketing > Activities (Full Menu)), click the '+' button to add a new record.

The form (CR308000) opens.

2. On the **Summary** tab, specify the settings:

- **From:** email account
- **Subject:**
- **Source:**
- **Planned:**

3. In the text editor area, type a message.

4. On the **Campaigns** tab, select the box next to the campaign. By selecting this box, you create a mailing list based on the list of the selected campaign's members.

When you have many different campaigns listed in the table and you select a few, each contact that is included in multiple marketing campaigns receives the message only once. The same is true for marketing lists. Also, if multiple contacts have identical email addresses, the message is sent to only one of them.

5. On the form toolbar, **Save** your changes and then **Send**.

When you click **Send**, emails are only generated but are not sent. To initiate the actual process of sending emails, you could use the **Send and Receive Email** form (SM507010).

On the **Messages** tab of the **Mass Emails** form (CR308000), you can view the list of sent messages with their statuses, and you can resend messages for which the sending operation has failed.

Lesson Summary

In this lesson, you have learned which tools you can use to nurture confirmed contacts. You have seen how to create a marketing campaign and a marketing list and send a mass email to selected recipients.

Part 3: Sales Operations

In this part, you will learn how to use MYOB Advanced to complete the following tasks, which are generally performed by members of the sales team:

- Creating lead-based prospects and opportunities
- Converting leads to contacts
- Suspending leads
- Generating opportunities
- Advancing opportunities through stages
- Creating opportunity-based quotes and invoices

Step 6.1: Creating a Lead-Based Prospect

A lead that has shown interest in the offered services qualifies as a prospect; when you create a new business account based on this lead, the system automatically copies some data from the lead record to the business account record. Simultaneously, the lead is converted to a contact associated with the new business account.

1. Open the **Leads** form (CR3010PL) and on the **All Records** tab, open the Mag Darrow record.
The **Leads** form (CR301000) opens and the form is filled with the data of the selected lead.
2. On the form toolbar, click **Actions > Create Business Account**
3. The **New Account** dialogue box opens. Enter in DEBRONCK in the **Business Account ID** field. Then select **Create**.

The **Business Accounts** form (CR303000) opens; it is filled in with the data of the lead record.



Newly created business accounts are prospects, as indicated by the **Type** value. They can be converted to a customer or supplier.

4. Change the **Business Account Class ID:** to *ENDCUST*.
5. On the **Attributes** tab, enter the following information and save your changes:
 - **Interested In:** *Performance Improvement*
 - **Organisation Size:** *Over 500 employees.*

As a result, the lead record is converted to a contact, a new business account is created and the contact becomes associated with the business account.

6. Save your changes.

As a result, the lead record has been converted to a contact, a new business account has been created and the contact is associated with the business account.

Step 6.2: Creating a Lead-Based Opportunity

A lead that becomes interested in the offer and displays an intention to buy as soon as possible can be regarded as a qualified opportunity. In MYOB Advanced, you can create a new opportunity based on such a lead, with some data automatically copied from the lead record to the opportunity record. At the same time, the lead is converted to a contact that becomes associated with the new opportunity.

We are using course specific database and will have to go to the **Opportunity Class of Hardware and Direct** to activate the stages.



- Open the **Opportunity Classes** form (CR2090PL; More Items > Opportunities > Preferences (Full Menu)).
- Select **Direct** and on the **Stages** tab activate all stages in the grid.
- Save your changes.
- Repeat for the **Hardware** class.

1. Open the **Leads** form (CR3010PL) and on the **All Records** tab, open the Leslie Graff record.
The **Leads** form (CR301000) opens and the form is filled with the data of the selected lead.
2. On the form toolbar, click **Actions > Create Opportunity**.
The **Opportunities** form (CRT304000) opens with the data copied from the lead record.
3. In the Summary area of the form, specify:
 - **Class ID:** *Direct*
 - **Status:** *New*
 - **Stage:** *Prospect*
 - **Subject:** *Enter a subject*
4. On the **Attributes** tab, enter the following information and save your changes:
 - **Interested In:** *Performance Improvement*
 - **Organisation Size:** *100-500 employees.*
5. Save your changes.
6. On the form toolbar, click **Actions > Create Account** to create a business account that will automatically be associated with the opportunity.
7. In the **New Account** dialogue box update the settings and then click **Create**.
 - **Business Account ID:** *AIRGAS*
 - **Company Name:** *Airgas, Inc.*
 - **Business Account Class:** *ENDCUST*
 - **Link Contact to Account:** *Selected*
8. On the **Attributes** tab, enter the following information and save your changes:
 - **Industry:** *Airlines, Hotels a& Travel*
9. On the form toolbar, click **Save** and then **Actions > Convert to Customer**, the Customer form (AR303000) opens with the data of the business account filled in.
10. Save your changes.

Step 6.3: Suspending a Lead

Suspended leads are leads that were not qualified as opportunities or for some reason have proved to be of no value to your company.

1. Open the **Leads** form (CR3010PL) and on the **All Records** tab, open the Bill Coleans record.
The **Leads** form (CR301000) opens and the form is filled with the data of the selected lead.
2. Change the **Owner** from Admin, Admin to Mike Hooper.
3. In the Summary area of the form, in the **Status** box, select **Suspended**.
The **Reason** value is automatically set to *Nuture*. You can filter leads by this value (or by their status) when you search for temporarily suspended leads.
4. Then Save your changes.

Step 6.4: Converting a Lead to a Contact

1. On the **Leads** form (CR3010PL), on the **All Records** tab, open the Joseph Clapton record.
The *Leads* form (CR301000) opens. The form is filled in with the data of the selected lead.
2. Change the **Owner** from Admin, Admin to Mike Hooper.
3. On the form toolbar, click **Actions > Convert to Contact**.
The **Contacts** form (CR302000) opens; it is filled in with the data of the lead record. The type of the record changes from **Lead** to **Contact**.
4. On the **Details** tab, in the **Contact Class** box, select *ENDCUST*
5. On the **Attributes** tab, enter the following information and save your changes:
 - **Interested in:** *To follow up*
 - **Organisational Size:** *1-100 Employees*

As a result, the lead record is converted to a contact, which can be further processed and converted to a business account or associated with an opportunity.
6. Save your changes:

Lesson Summary

In this lesson, you have learned how to qualify leads, which includes converting leads to contacts, creating lead-based prospects and opportunities, and suspending leads.

Lesson 7: Work with Opportunities

MyCompany needs as many opportunities as possible to result in actual sales. The company also wants to be able to control the process of their transition toward closed deals. As many opportunities are moving through different stages, each stage being characterised by a certain probability of ending in actual sales, MyCompany needs to estimate future revenue with reasonable accuracy for each financial period.

In this lesson, you will see how to manage the following tasks:

1. Create opportunities by using the Opportunities form (CR304000) and the MYOB Advanced add-in for Outlook.
2. Process opportunities, which includes preparing initial proposals, negotiating prices and discounts, closing deals.
3. Create an invoice based on an Opportunity.

In MYOB Advanced, you can manually specify the expected amount of the opportunity and the amount of the discount that you are going to apply. This is an acceptable practice if you want to obtain accurate forecasts of sales revenue. However, you can specify a list of services or products that are the subject of the potential deal, together with their prices, quantities, and discount amounts; such efforts enable you to easily track all necessary information about the deal and, if needed, create sales orders or invoices based on the products that you have associated with the opportunity.

In this lesson, you will add information about 40 hours of the *Financial Strategies* service that Mag Darrow's company wants to purchase at half-price while your marketing campaign is still running. Then you will close the deal and create an invoice.

An opportunity can be either won or lost. Winning an opportunity means that you have successfully negotiated with the prospect all aspects of the deal and can proceed with creating an invoice based on the opportunity; to be able to do this, you will create a prospect based on the contact associated with the opportunity, and then convert the prospect to a customer.



You can create a sales order based on an opportunity if the *Inventory and Order Management* feature has been enabled on the *Enable/Disable Features* form (CS100000).

In MYOB Advanced, business accounts are used to store information related to prospects, customers, and suppliers. One business can be both your customer and your supplier; however, suppliers are outside of the scope of this course.

A customer account stores all customer-related information you need to conduct business. It includes addresses, locations, contacts and payment methods as well as financial, billing, delivery and mailing settings.

Lesson Objectives

In this lesson, you will see the basic procedures of working with opportunities.

- Create new opportunities
- Create a list of products associated with an opportunity
- Win an opportunity
- Convert a prospect to a customer
- Create an invoice based on a won opportunity

Step 7.1: Creating Opportunities

In MYOB Advanced, an opportunity can be created in one of the following ways:

- By using the Opportunities form (CR304000)
- By using the MYOB Advanced add-in for Outlook
- By creating a lead-based opportunity using the Leads form (CR301000) as a starting point.

Create an Opportunity on the Opportunities form

To create an opportunity in MYOB Advanced:

1. On the **Opportunities** Quick Menu click '+' to add a new opportunity.
2. In the Summary area of the **Opportunities** form (CR304000) specify:

- **Class ID:** *Direct*
- **Business Account:** *DEBRONCK*
- **Subject:** *Direct Sales Lead - Debronck*

3. On the **Attributes** tab, update:

- **Interested In:** *Performance Review*
- **Organisation Size:** *100-500 Employees*

100-500 employees means that you are dealing with a medium-sized organisation and you will assign this opportunity to an employee from *Sales Team 1* that specialises in sales to small and medium-sized companies.

4. On the **Details** tab, select the following values and save your changes:

- **Workgroup:** *Sales Team 1*
- **Owner:** *Jaco Steyne (this field is in the summary area)*



On the **Details** tab, in the **Probability** read-only box, you can see a percentage value that defines the probability of closing the sale at the current stage.

Create an Opportunity by Using the MYOB Add-in for Outlook

1. In Outlook for the Web, select an email and click the MYOB Advanced ribbon button.
2. On the add-in form with the contact information displayed, click **Create Opportunity**.

The **New Opportunity Details** group of elements appears. Update:

- **Class ID:**
- **Subject:**
- **Stage:**
- **Encoding:**

3. Click **Create Opportunity**.

As a result, the currently opened email is attached to the newly created opportunity record as a related email activity. The opportunity is associated with the selected contact, and you can review the basic information about the opportunity, such as its identifier and description, on the add-in form.



If you create multiple opportunities based on the same email, the information about the most recently created opportunity is displayed on the add-in form for the contact.

Step 7.2: Advancing an Opportunity Through Stages

1. Prepare an initial proposal by adding products to an opportunity.
2. Convert the prospect business account to a customer.
3. Close the deal by winning the opportunity.

1. Add Products to an Opportunity

1. Open the Opportunities form (CR3040PL) and on the **All Records** tab, double-click the *DEBRONCK* record.

The *Opportunities* form (CR304000) opens. The form is filled in with the data of the selected opportunity.

2. In the Summary area change the **Status** to *Open*.
3. On the **Document Details** tab, add a new row with the following information (as shown in the screenshot below), and then save the changes:
 - **Inventory ID:** SRCONSULT
 - **Free Item:** Cleared
 - **Quantity:** 40
 - **Discount %:** 50
 - **Manual Discount:** Selected

In this step, you provide the 50% discount because you are running a marketing campaign that offers your services at half-price. You can specify discounts in any of the following ways:

- By typing the discount % in the **Discount** box on the **Document Details** tab (in this case, the value in the **Discount Amount** box is calculated automatically).
- By typing the discount amount in the **Discount Amount** box on the **Document Details** tab (in this case, the value in the **Discount** box is calculated automatically).
- You can manually key in the discount amount in the **Discount** box in the Summary area of the form by checking the **Manual Amount** checkbox.



The first two methods should be applied to each row individually; the last method defines the discount amount applied to the summarised amount of all included products and services.

Make any changes required and **Save**.

2. Convert the Prospect Business Account to a Customer

1. On the **Business Accounts** form (CR3030PL), for *DEBRONCK Business Account* on the form toolbar, click **Actions > Convert to Customer**.

The *Customers* form (AR303000) opens; it is filled in with the data of the business account.

2. Leave all data as it is and **Save** your changes.

As a result, a new customer is created, and the business account, whose type has changed from *Prospect* to *Customer*, enables you to create an invoice when the opportunity is won.

3. Win the Opportunity

1. Open the **Opportunities** form (CR3040PL) and select the *DEBRONCK* opportunity for the *SRCONSULT* hours.

2. In the Summary area, specify the following information, and **Save** your changes:
 - **Status:** *Won*
 - **Stage:** *Won*
3. On the **Activities** tab you could create a *Note* activity and specify information about price and discount negotiations that you have conducted

After you have saved the changes, you can create a financial document—that is, an invoice—based on the opportunity.

Step 7.3: Creating Opportunity Based Quotes and Invoices

For an opportunity that has the *Won* status and is associated with a business account of the Customer or Customer & Supplier type, you can create an invoice if at least one stock or non-stock item is specified on the **Products** tab of the Opportunities form (CR304000). In this step, you will create an invoice based on the won opportunity

1. Open the **Opportunities** form (CR3040PL and select DEBRONCK opportunity for *SRCONSULT* hours.
2. On the form toolbar, click **Actions > Create Invoice**.

The **Invoices and Memos** form (AR301000) opens; it is filled in with the data from opportunity details.

As a result, a new invoice is created; you can adjust its details and further process it according to the workflow.



Similarly, with the **Inventory and Order Management** feature enabled for your company on the **Enable/Disable Features** form (CS100000), you can create sales orders of the *Quote* order type. A quote is a proposal of future sales to a customer for a specified price; it can be quickly converted to a sales order if the customer accepts the quote. If you create a quote based on an opportunity, the stock items specified on the **Products** tab of the **Opportunities** form (CR304000) will be included as order lines for a quote. You can also create a quote from the Quotes tab on the **Opportunities** form (CR304000) till the opportunity is in Open status.

Lesson Summary

In this lesson, you have associated an opportunity with a customer account, specified the services that are included in the potential deal and closed the deal by winning the opportunity. Also, you have learned how to create an invoice associated with the opportunity that was won.

Part 4: Support Operations

In this part, you will learn how to use MYOB Advanced to complete the following tasks, which are generally performed by members of the support team:

- Registering support cases
- Assigning cases to owners
- Processing cases
- Releasing cases and creating the associated invoices

Lesson 8: Support Cases

MyCompany needs to be able to quickly access information about any incident, route it to the person that can best address the issue, and keep customers informed of the progress on their request.

In MYOB Advanced, cases (also known as tickets) are used to record customer requests, problems, complaints, and other inquiries received by email, phone, fax, or any other medium.

In MYOB Advanced, each request can be characterised by a wide variety of related information, such as the following:

- **Basic information:** This information includes the customer, the contact, the case class, the status of the case, a subject and description of the case, and the date the case is reported.
- **Ownership details:** The case can be assigned to both a workgroup and an individual owner within the group.
- **Contract:** Contract cases require specifying the contract on entry. In this lesson, we do not use contracts.
- **Timing information:** The person working on the case can enter an estimate of the time to be spent on the case. Actual hours spent (broken down into work hours, overtime hours, billable work hours, and billable overtime hours) can be recorded later.
- **Severity and priority:** The severity assigned to the case may also relate to a time requirement – the reaction time and SLAs defined by the case class. In this course, you will not define the reaction time. Priorities are generally used to escalate the processing of the cases. If you assign a colour code to each priority level, the cases will be displayed on the user dashboard highlighted according to their priorities.
- **Related cases and relations:** A case might have other related cases. It might also have employees and customers assigned who take part in making decisions concerning the case.

In this lesson, you will perform the following tasks:

1. Register a new case in the system.

To reduce expenses, *Airgas Pty Ltd.*, MyCompany's customer, has followed the recommendations of MyCompany's consultants and reduced its staff by half, but the results are not satisfactory. Now they want your specialists to analyse the situation and to conclude whether other improvements can be made in their organisational processes.

In this lesson, you will manually register their request as a support case by using the **Cases** form (CR306000).



You can register a case by using the **Cases** tab on the **Contacts** form (CR302000) or **Business Accounts** form (CR303000). Also, you can configure the incoming mail processing functionality by using the **System Email Accounts** form (SM204002) to enable automatic creation of cases based on incoming emails.

2. Assign the case to an owner.

You can automatically assign cases (one at a time or in bulk) by using an assignment map; to do this, you define the criteria that you can use to distribute cases among your support specialists. However, in this lesson, you will manually assign the new case to an owner.

3. Process the case.

Case processing involves the following activities by the assigned specialist: analysing the issue, finding a solution, implementing the solution, and closing the case. You will create an activity and associate it with the case to record information about all stages through which the case has progressed. The customer should be notified when the case has been resolved.

4. Release the case.

After the case has been resolved, you can release it. Releasing a case means that the associated customer will be invoiced in accordance with the case properties. You can release only billable cases.

5. Monitor the efficiency of the support team.

You can use inquiry forms or dashboards to monitor the efficiency of your support employees

Lesson Objectives

In this lesson, you will learn the basic procedures of processing support cases. You will do the following:

- Register a case in the system
- Assign the case to an owner
- Resolve the case
- Release the case

Step 8.1: Registering a Case

In this step, you will manually register a case.

1. Open **Cases** (CR3060PL; More Items > Support) and create a new record.
2. When the **Cases** form (CR306000) opens, specify the following information in the Summary area:
 - **Business Account:** *AIRGAS*
 - **Contact:** *Lesley Graff*
 - **Subject:** *Extra analysis of organisational processes*

The **SUPPORT** case class is selected by default as specified on the **Customer Management Preferences** form (CR101000).

3. On the **Details** tab, in the Editor area, type a description of the request, then **Save** your changes

Now the case is ready to be assigned to a support specialist.

Step 8.2: Assigning the Case to an Owner

In this step, you will perform the following tasks, each of which is described in detail in the following sections:

1. Manually assign the new case to an owner, Scott Murphy.
2. Set up email notifications for owners.

1. Assign a Case to an Owner

1. Open the **Cases** form (CR3060PL) and on the **All Records** tab, double-click the case that you created in the previous step.

The **Cases** form (CR306000) opens. The form is filled in with the data of the selected case

2. In the Summary area of the form, specify the following information, then **Save** your changes:
 - **Owner:** Scott Murphy
 - **Status:** Open
 - **Reason:** In Process

2. Set Up Email Notifications

Each time, when assigned to a new case, a support specialist should receive a notification by email. To set up notifications, you can use **Automation Notifications** form (SM205040).

Step 6.4: Processing the Case

We will look at how to process cases.

To complete this step, you need to log in to MYOB Advanced as the support manager.

1. Record Information About Case Processing

1. Open the **Cases** form (CR3060PL) select the case that you are working on.
2. On the table toolbar of the **Activities** tab, click **Add Activity > Add Work Item**.
3. The **Activity** form opens in a pop-up window
4. In the **Editor** area, type a description of the activities that you have performed to resolve the request.
5. On the form toolbar, click Save.

2. Close the Case

To close the Case you have just resolved, do the following:

1. On the **Additional Info** tab of the Cases form (CR306000), select the **Manual Override** check box, and then, in the **Billable Time** box, specify *02 h 00 m*.
2. In the Summary area of the form, select the following values and then Save your changes:
 - **Status:** Closed
 - **Reason:** Resolved

3. Set Up Email Notifications

When a case has been resolved, the customer should receive a notification by email. To set up notifications, open the **Automation Notifications** form (SM205040) and add a notification:

1. In the Summary area of the form, select the following values and then **Save** your changes:
 - **Screen ID:** Cases (*Company->Organisation->Customer Management->Work Area->Enter->Cases*)
 - **Description:** Case has been resolved
 - **Active:** Selected
 - **Public:** Cleared
 - **Subject:** Case ((Case.CaseID)) has been resolved
 - **Data Source:** None
2. On the **Message** tab, in the text area, enter the following message:

Dear ((Case.ContactID)),

Case ((Case.CaseID)) has been resolved; please verify! Sincerely yours, [your name]

The customer will see this message in the body of the notification email, with relative data automatically specified in place of placeholders.
3. On the **Conditions** tab, add a row with the following information:
 - **Active:** Selected
 - **Field Name:** Reason
 - **Condition:** Equals
 - **Value:** Resolved
4. On the **Addresses** tab, edit the existing rows as follows:

- **Active:** Selected
 - **Source:** Document
 - **Email:** Contact->Email
5. On the **Fields** tab, add a row with the following information and then **Save** your changes:
- **Active:** Selected
 - **Field Name:** Reason

Step 6.5: Releasing the Case

In this step, you will release the resolved case. In MYOB Advanced, you can release billable cases either one at a time on the **Cases** form (CR306000) or in batches on the **Release Cases** form (CR507000). Use any of the following methods:

1. Open the **Cases** form (CR3060PL) and double-click the case that you closed in the previous step.
2. On the form toolbar, click Actions > Release.

An invoice is created for the customer whose account is associated with the case. To view the invoice, click Inquiries > View Invoice.

Lesson Summary

In this lesson, you have learned how to register new cases in the system and assign them to appropriate support specialists. You have processed a case, recorded all related information by creating an associated activity, and then closed the resolved case. You have also released the case, which resulted in invoicing the customer.

Part 5: Reporting

In this part, you will learn how marketing, sales, and support personnel can use the reporting tools of MYOB Advanced to retrieve and analyse various CRM data. You will complete the following tasks:

- Review marketing data by using inquiry forms, pivot tables, and dashboards designed for marketing personnel
- Review sales data by using inquiry forms, pivot tables, and dashboards designed for sales personnel
- Review support data by using inquiry forms, pivot tables, and dashboards designed for support personnel

Lesson 9: Generic Inquiries, Dashboards and Pivot Tables

In MYOB Advanced you can use the following tools to retrieve sales, marketing and support information:

- Inquiry Forms
- Dashboards
- Pivot Tables

The Generic Inquiry is an integrated MYOB Advanced tool that provides non-programmers with a web-based interface they can use to create inquiry forms and add them to the system.

A dashboard is a collection of widgets that are displayed on a single page and are designed to give you needed information at a glance. With dashboards, you can act on real-time information that you have at your fingertips. Dashboards may serve different purposes, and you can create dashboards that display information from various sources, including MYOB Advanced inquiry and processing forms. If the source is an MYOB Advanced form, its data can be displayed in various types of charts and tables, with the data filtered according to selection criteria. From the dashboard, you can click any widget to explore the information further.

In MYOB Advanced, you can use pivot tables to reorganise and summarise data from generic inquiries and analyse it from various perspectives. This capability is useful when you have large amounts of data in the generic inquiry and you need to build aggregate reports based on this data. Another way to use pivot tables is to create reports that contain records with row and column totals.

The creation of generic inquiries, dashboards, and pivot tables is outside of the scope of this course. To learn more about these tools, see the S130 Data Retrieval and Analysis course.

In this lesson, you will review preconfigured inquiry forms, pivot tables, and dashboards designed for employees with different responsibilities. You will perform the following tasks:

Review inquiry forms, pivot tables, and dashboards designed for employees in:

- marketing
- sales
- support

Lesson Objectives

In this lesson, you will learn how you can use generic inquiries, dashboards, and pivot tables to review and analyse CRM data by a review of:

- marketing data
- sales data
- support data

Step 9.1: Reviewing Marketing Data

The responsibilities of a marketing manager may include:

- Developing strategies and tactics to get the word out about the company.
- Deploying successful marketing campaigns and owning their implementation from preparation to execution
- Measuring the results of marketing campaigns
- Experimenting with a variety of organic and paid acquisition channels, such as pay per click campaigns, event management, publicity, social media, lead generation campaigns, and performance analysis
- Building strategic relationships and partnering with key industry players, agencies, and vendors
- Being in charge of the marketing budget and allocating the funds

To complete these tasks, a customer marketing manager needs to have access to respective marketing data.

In this step, you will review examples of preconfigured inquiry forms, pivot tables, and dashboards that may be helpful for marketing personnel.

1. **Lead Summary** form (CR3010PT; More Items > Opportunities > Reports (Full Menu)); a pivot table that displays the distribution of leads with various sources by status.
2. **Campaign Sales Orders** form (CR203010; More Items > Marketing > Reports (Full Menu)); an inquiry form that displays information about marketing campaigns associated with sales orders.
3. **Campaign Summary** form (CR2020BI; More Items > Marketing > Reports); an inquiry form that displays statistical information about marketing campaigns.
4. **Campaign Invoices** form (CR203000; More Items > Marketing > Reports (Full Menu)); an inquiry form that displays information about marketing campaigns associated with invoices.
5. **Leads by Geography** form (CR3011PT; More Items > Marketing > Reports (Full Menu)); a pivot table that displays the distribution of leads by country and state.
6. **Sales Tasks Dashboard** form (Data Views > Dashboards (Full Menu)); a dashboard that includes widgets providing analysis of marketing operations.

Step 9.1: Reviewing Sales Data

The responsibilities of a customer service representative and sales manager may include:

- Selling products and services to prospective customers
- Performing cost-benefit analyses of existing and potential customers
- Maintaining positive business relationships to ensure future sales
- Achieving growth and hitting sales targets by successfully managing the sales team
- Expanding MyCompany's customer base and ensuring its strong presence on the market
- Building and promoting strong, long-lasting customer relationships
- Analysing and controlling the KPIs of sales representatives in order to improve the sales processes
- Presenting sales, revenue, and expense reports and realistic forecasts to the management team

To complete these tasks, sales personnel need to have access to respective sales data.

In this step, you will review the examples of preconfigured inquiry forms, pivot tables, and dashboards that may be helpful for sales personnel.

1. **Opportunity Summary** form (CR3040PT; More Items > Opportunities > Reports); a pivot table that displays the distribution of opportunities that belong to different classes by stage.
2. **Opportunities by Geography** form (CR3041PT More Items > Opportunities > Reports (Full Menu)); a pivot table that displays the distribution of opportunities by country and state.
3. **Opportunity Products** form (CR3042PT; More Items > Opportunities > Reports (Full Menu)); a pivot table that displays a list of inventory items that are included in opportunities as products.
4. **Accounts by Geography** form (CR3031PT More Items > Opportunities > Reports (Full Menu)); a pivot table that displays the distribution of opportunity-related customer accounts by country and state.
5. **Sales Manager Dashboard** form (Data Views > Dashboards (Full Menu)); a dashboard that includes widgets providing analysis of marketing operations.

Step 9.3: Reviewing Support Data

The responsibilities of a customer support representative and support manager may include:

- Taking ownership of reported customer cases and handling them through to resolution
- Communicating with experts to identify solutions and resolve cases
- Monitoring the SLA time
- Following standard procedures for escalation of unresolved cases to appropriate internal teams
- Assigning service representatives to reported customer cases
- Monitoring the SLA time
- Analysing and controlling the case metrics and the KPIs of support representatives to improve the support processes

To complete these tasks, support personnel need to have access to respective support data.

In this step, you will review the examples of preconfigured inquiry forms, pivot tables, and dashboards that may be helpful for support personnel.

1. **Case Summary** form (CR3060PT; More Item > Support > Reports); a pivot table that displays the distribution of cases by class and priority.
2. **Cases by Geography** form (CR3061PT; (CR3060PT; More Item > Support > Reports (Full Menu)); a pivot table that displays the distribution of cases by country.
3. **Cases by Owner** form (CR3062PT; (CR3060PT; More Item > Support > Reports (Full Menu)); which is a pivot table that displays the distribution of cases by owner and priority.
4. **Support Activities** form (CR3061BI; (CR3060PT; More Item > Support > Reports); an inquiry form that displays a list of activities performed by support employees.
5. **Support Dashboard** form (Data Views > Dashboards (Full Menu)); a dashboard that includes widgets necessary for a support manager to analyse the support processes.
6. **Tasks and Approvals Dashboard** form (Data Views > Dashboards (Full Menu)); a dashboard that includes widgets necessary for a support representative to analyse their workload and plan their work accordingly.

Part 6: MYOB Advanced Self-Service Portal

In this part, you will learn how your customers can access their account information, create and manage support cases and create and track online orders by using the Acumatica Self-Service Portal.

You will review the following tasks:

- Manage access to the Self-Service Portal
- Manage the hierarchy of customer accounts
- Manage customer cases

Lesson 10: Work with the Self-Service Portal

The Self-Service Portal provides a solution for you to more efficiently work and communicate with customers. The Self-Service Portal is a site where customers can view relevant information about their interactions and perform activities online, such as:

- Access their account information
- Create and manage support cases
- Create and track online orders



Online ordering is a part of distribution; it is not available to your customers if the **Distribution** feature is disabled for your company

After you install MYOB Advanced Self-Service Portal and before you make it available to your customers, you configure the Self-Service Portal instance. In this lesson, you will learn how you can complete the following administrative tasks of managing:

1. Access to the Self-Service Portal
2. The hierarchy of customer accounts
3. Customer cases

Lesson Objectives

In this lesson, you will learn how to use the Self-Service Portal to:

- Create a user account with the *Portal User* role for a contact
- Configure relationships between parent and child customer accounts
- Set up default settings for cases

Step 10.1: Managing Access to the Self-Service Portal

To give a contact access to the Acumatica Self-Service Portal, you need to add a user account to the contact account in MYOB Advanced ERP. This user account must have a contact-related user type and the *Portal User* role assigned. A user with this role assigned can sign in to Self-Service Portal and review the information pertaining to the business account that is associated with the contact account of the user, including:

- The company profile
- Contacts
- Contracts with the organisation:
- The financial documents associated with the company

You can add a user account to a contact account by using:

- The **Contacts** form (CR302000) to open the contact for editing, and then adding the user account information on the **User Info** tab
- The **Users** form (SM201010) to create a user account and linking it with a contact account

To create a user account for a customer.

1. On the **Users** form (SM201010; More Items > User Security > User Management), In the Selection area, in the **Login** box, enter the customer login for the new user account.
2. In the **User Type** box, select *Unrestricted External User*.
3. In the **Linked Entity** box, select the customer entity.
4. On the **Roles** tab, select the **Selected** check box for the *Portal User* role.
5. On the form toolbar, click **Save**.

After you have added the user account for a contact, an email containing the user login and password is sent to the user's email account. This will only happen in case of a working cloud site. No emails are sent out for locally configured sites.

Step 10.2: Managing the Hierarchy of Customer Accounts

The hierarchy of customer accounts is a group of relationships between parent and child customer accounts. A customer account can have a virtually unlimited number of child customer accounts, but only one parent customer account.

To set this up:

1. Open the **Business Accounts** form (CR3030PL) and select the business account you wish to have as a child of another account.
2. In the CRM section of the Details tab, in the Parent Account box select the business account that will be the parent.
3. Save your changes.

Once set up, portal users from the child account can use the self-service portal to:

- View and manage the list of customers of both the parent and child accounts.
- View and manage the list of contacts for both accounts.
- Track support cases of both accounts.

Step 10.3: Managing Customer Cases

With the Self-Service Portal, you can give customers the ability to submit new cases, change the case priority, enter additional information, get updates on the case status by email, check a case for updates, and view responses to a case

Case processing starts when a customer submits a new case. The new case immediately becomes available, where support representatives process it according to the company's workflow

Customers can track cases by the changes in the case status, which can be any of the following:

- **New:** a new case
- **Open:** being processed



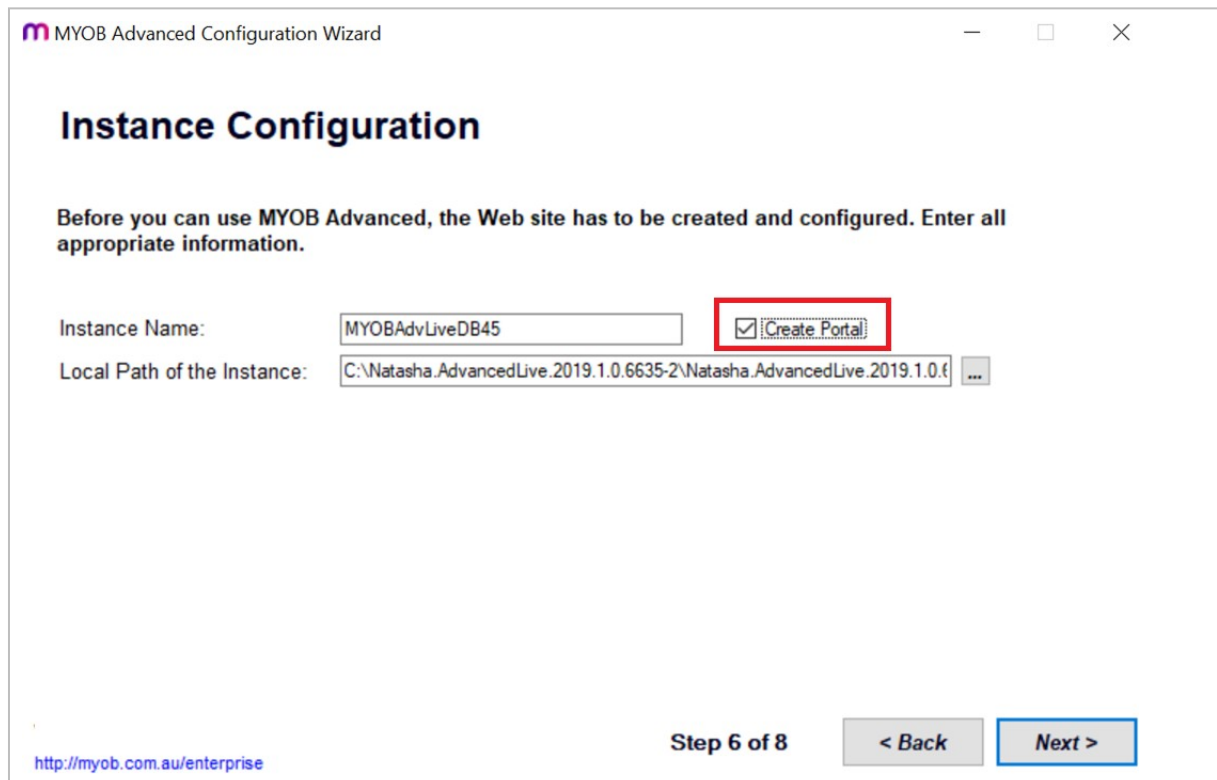
When a case is resolved, and the customer closes it, the case status is set to *Open* with the reason *Pending Closure*. Any required information can be added to the case and then the case is closed.

- **Pending Customer:** requires customer input.
- **Closed**



To help case owners monitor the cases created by a user through the Self-Service Portal, you can set up notifications on changes in such cases. With the notification enabled, case owners get emails when customers make changes in case records on the Self-Service Portal. However, in this course, we will not create a notification template for these notifications.

In this step, you will review the set up of the Self-Service Portal preferences so that customers can use the Self-Service Portal to create and manage cases. In order to access the self-service, it needs to be setup during MYOB Advanced Business configuration as given in the screenshot.



MYOB Advanced Configuration Wizard

Instance Configuration

Before you can use MYOB Advanced, the Web site has to be created and configured. Enter all appropriate information.

Instance Name: ☒ Create Portal

Local Path of the Instance: ...

http://myob.com.au/enterprise

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Figure: Customer Portal Setup during site configuration

1. Sign into the Self-Service Portal instance.
2. Open the **Portal Preferences** form (SP800000; More Items > Administration > Administration).
3. In the **Portal Site Branch** box select the company.
4. In the **CRM Settings** settings:
 - In the **Default Case Class** box select your preferred case class
 - In the Priority box, select your preferred default case priority.

When adding a new case, the customer will be able to change these settings.

5. Save your changes.



Configuring self-service portal is outside the scope of this course. loca

Lesson Summary

In this lesson, you have learned how you can create a user account with the Portal User role for a customer-related contact. You have learned how to configure relationships between parent and child customer accounts so that contacts from the parent organisation can access information related to child organisations. Also, you have set up default settings for cases so customers can use the Self-Service Portal to create and manage their cases.