Dynamics 365 - Leads Quick Guide

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Leads Quick Guide

1. Check the lead/opportunity doesn't already exist

2. Navigate to Leads

3. Create 'New' in the top tool bar

4. Complete all details within the Summary and Details tab.

5. Save

6. When the lead is ready to progress, complete Qualify in the process bar - **Please note: fill out as much information as possible before qualifying, as the fills are locked down once qualified.**

7. Click Qualify in the top toolbar

8. A new opportunity will be created

Dynamics 365 - Leads Quick Guide.pptx

Important Notes:

Suggested Fields

Dynamics includes a smart feature that suggests options for regularly completed fields. However, these suggestions must be confirmed before saving. Suggested options appear in blue. Review and confirm or discard these suggestions before saving the record.