SOP – How to Update Leads in CRM

**Process**

1. Login to Dynamics CRM
2. From the dashboard, select Marketing

3. Next, select *Leads*

4. From here, click the name of the lead that needs to be updated

5. Verify or edit / update to ensure the lead record has the following information:
	1. Topic
		1. First & Last Name
	2. First Name
	3. Last Name
	4. Direct Phone
		1. Some forms may put this number under Business Phone. You will need to copy and paste the number into the “Direct Phone” field.
	5. Email
	6. Last Form
	7. Last Form Date
	8. Accepted Terms Date
	9. Newsletter Sign-up Date (if they subscribed to mailing list)
	10. Company
	11. Website
6. In the top left-corner, update the lead tracking information

7. The following information should be updated:
	1. Lead Source
		1. This can be found viewing the original form link below or the original email form submission
		
	2. Rating
		1. If disqualified, change to *Cold*
	3. Status
	4. Owner
		1. Assigned Account Rep
8. Save
