Qualifying an International ead

* + 1. Login to Dynamics CRM
    2. Go to Marketing > Leads
    3. Go to the lead record
    4. Under the “Lead to Opportunity Sales…” bar click “Related”
    5. A picture containing graphical user interface

       Description automatically generated
    6. Under “Related: Common” click “Activities”
    7. Graphical user interface, application

       Description automatically generated
    8. Click the arrow for the “New Activity” drop menu
    9. Graphical user interface, application

       Description automatically generated
    10. Select “Email”
    11. From here, use the following information:
  1. Subject Line: RE: [Original Intent Form] Request – [Contact Name]
  2. Email Body:

Hello [First-Name],

I am hoping to gather just a little more information from you in order to better assist you. Just to clarify:

* Are you intending to use RightFax within the U.S. or internationally?

With an answer to this question, I should be able get you in touch with the appropriate group at Advantage.

Best,

[Signature]

* + 1. When ready, click “Send” on the left side of the top bar.



* + 1. Update the record in CRM with all required information including the following:
       1. Status: Contacted
       2. Rating: Warm