Sending a Business Name / URL Qualification Email

* + 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. 
		6. Under “Related: Common” click “Activities”
		7. 
		8. Click the arrow for the “New Activity” drop menu
		9. 
		10. Select “Email”
		11. From here, use the following information:
	1. Subject Line: RE: [Original Intent Form] Request – [Contact Name]
	2. Email Body:

Hi [Lead Name],

I am hoping to gather just a little more information from you in order to get you started with a [Product] [Quote/Demo/Support/Upgrade/Etc] Request. Just to clarify:

Do you have a Business Name and/or Web URL we can associate with this request?

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

Best,

Name

Role

Email

* + 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: Cold