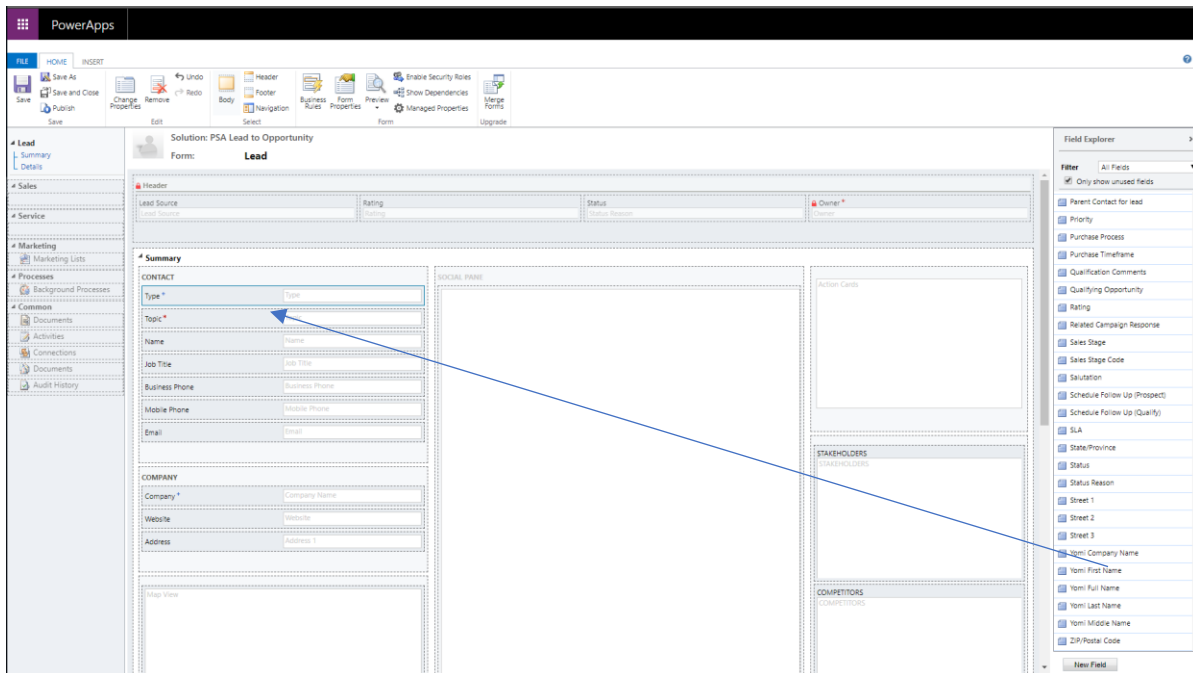


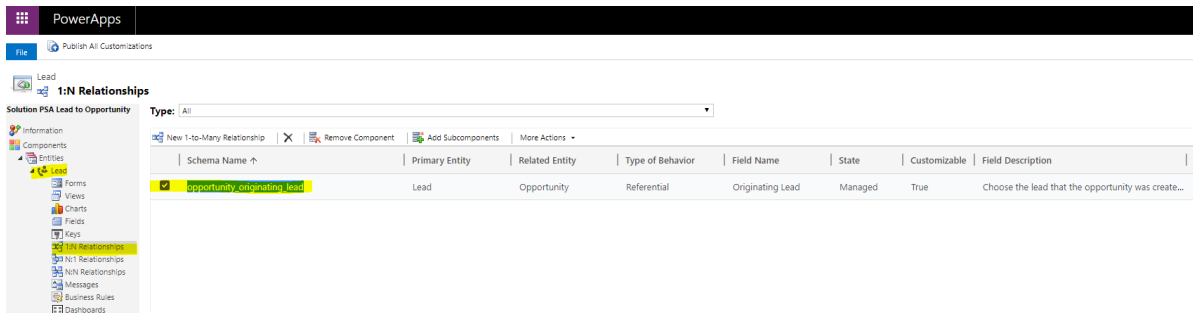
How to Correctly Qualify a Lead to the Proper Opportunity Record

Follow these steps to configure new fields and create new field mappings to the proper Opportunity fields:

1. Open the Lead Form customization window
2. Drag and Drop the Type field from the Field Explorer panel onto the Lead form



3. Navigate to the 1: N Lead to Opportunity Relationship [opportunity_originating_lead]



- Open Mappings for the relationship
- Click New

PowerApps

File Save and Close Show Dependencies Managed Properties

Relationship
Lead to Opportunity

Common New X More Actions

Information Mappings

Source Name	Source Display Name	Target Name	Target Display Name
budgetamount	Budget Amount	budgetamount	Budget Amount
budgetstatus	Budget	budgetstatus	Budget
campaignid	Source Campaign	campaignid	Source Campaign

- Select Type from Lead to Opportunity and click Ok

Create Field Mapping From Lead to Opportunity - Google Chrome

Secure | https://encoreblog.crm.dynamics.com/tools/system/customization/relationships/mappings/createMapping.aspx?appSolutionId=%7B72DC5BDD4-98B8-E811-A9E3-000D3A1C93977d&mappingId=%7B6921A8B8-E976-E811-A958-000D3A1D7B6797d

Create Field Mapping From Lead to Opportunity
Create field mapping.

Source Entry Fields

Name	Display Name	Type (Size)
statecode	Status	Status
statuscode	Status Reason	Status Reason
address1_line1	Street 1	Single Line of Text(250)
address1_line2	Street 2	Single Line of Text(250)
address1_line3	Street 3	Single Line of Text(250)
timepentbymeonema...	Time Spent b...	Single Line of Text(1250)
timezoneruleversion...	Time Zone Ru...	Whole Number
subject	Topic	Single Line of Text(300)
traversedpath	Traversed Path	Single Line of Text(1250)
msdyn_ordertype	Type	Option Set
utcconversiontimezon...	UTC Conversi...	Whole Number
versionnumber	Version Num...	Time Stamp
websiteurl	Website	Single Line of Text(200)
yomicompanyname	Yomi Compa...	Single Line of Text(100)
yomifirstname	Yomi First Na...	Single Line of Text(150)
yomifullname	Yomi Full Na...	Single Line of Text(450)
yomilastname	Yomi Last Na...	Single Line of Text(150)
yomimiddlename	Yomi Middle ...	Single Line of Text(150)
address1_postalcode	ZIP/Postal Co...	Single Line of Text(20)

1 - 145 of 145 (1 selected)

Target Entry Fields

Name	Display Name	Type (Size)
captureproposalfeedb...	Proposal Fee...	Two Options
proposedsolution	Proposed Sol...	Multiple Lines of Text
quotecomments	Quote Comm...	Multiple Lines of Text
overriddencreatedon	Record Creat...	Date and Time
isrevenueystemcalcul...	Revenue	Two Options
salesstage	Sales Stage	Option Set
scheduleproposalmee...	Schedule Pro...	Date and Time
schedulefollowup_pro...	Scheduled FO...	Date and Time
schedulefollowup_qua...	Scheduled Fo...	Date and Time
sendthankyounote	Send Thank Y...	Two Options
slaid	SLA	Lookup
stageid	Stage Id	Unique Identifier
statuscode	Status Reason	Status Reason
stepid	Step	Unique Identifier
timezoneruleversion...	Time Zone Ru...	Whole Number
timeline	Timeline	Option Set
traversedpath	Traversed Path	Single Line of Text(1250)
msdyn_ordertype	Type	Option Set
utcconversiontimezon...	UTC Conversi...	Whole Number

1 - 56 of 56 (1 selected)

Help OK Cancel

7. Save and close then Publish your Solution
8. Users will need to select the Lead Type before qualifying the record
 - a. Item Based will result in the regular Opportunity form
 - b. Work Based will result in the Opportunity: Project Service form

The screenshot displays the Microsoft Dynamics 365 Sales interface for a lead record. The navigation bar at the top shows 'Dynamics 365', 'Sales', and 'Leads > Lidman Anna (sample) >'. Below the navigation bar is a banner with the text 'Don't Lose Access to Dynamics 365. Convert to a paid subscription' and a 'Buy Now' button. The main content area features a 'LEAD' dropdown menu, a profile picture, and the name 'Lidman Anna (sample)'. A progress bar indicates the lead's status: 'Qualify (Active for 2 days, 6 hours)', 'Develop', and 'Propose'. Below the progress bar, there are several fields with values and actions:

Existing Contact?	click to enter	✓ Estimated Budget	\$6,000.00	Capture Summary	click to enter
Existing Account?	click to enter	✓ Purchase Process	Individual		
✓ Purchase Timeframe	This Quarter	Identify Decision Ma...	mark complete		

Below the progress bar is a 'Summary' section with a 'CONTACT' tab. The 'CONTACT' tab shows the following fields:

Type*	Work based
Topic*	Some interest in our products (sample)
Name*	Lidman Anna (sample)
Job Title	

To the right of the 'CONTACT' tab are two tabs: 'POSTS' and 'ASSISTANT'. The 'POSTS' tab is active and shows a text input field with the placeholder 'Enter post here'.

9. Qualify Lead

+ NEW DELETED **QUALIFY** PROCESS DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE

LEAD ▾
Lidman Anna (sample) ☰

✓ **Qualify** Develop (Active for 5 days, 22 hours)

✓ Existing Contact?	Lidman Anna (sample)	✓ Estimated Budget	\$6,000.00	Capt
✓ Existing Account?	Woodgrove Bank	✓ Purchase Process	Individual	
✓ Purchase Timeframe	This Quarter	Identify Decision Ma...	mark complete	

Summary

CONTACT		POSTS
Type *	Work based	Enter post here
*Contracting Unit	Encore Sales	

10. Notice the new Opportunity record is now in the correct Opportunity: Project Information form

+ NEW 👤 CLOSE AS WON 🚫 CLOSE AS LOST 🚫 CLOSE ALL QUOTES 📊 RECALCULATE OPPORTU... 📄 FORM

OPPORTUNITY : PROJECT INFORMATION ▾

Some interest in our products (sample) ▾

✓ **Qualify** ▶ **Develop (Active for -1 days, -1 hour)**

Customer Need	click to enter	Identify Competitors	mark complete
Proposed Solution	click to enter		
Identify Stakeholders	mark complete		


◀ **Summary**

Topic *	Some interest in our products (sample)
Contact	Lidman Anna (sample)
Account	Woodgrove Bank
Account Manager *	Youngha Kim
Contracting Unit *	🔒 Encore Sales
Purchase Timeframe	This Quarter

POSTS

Enter post here

All posts Auto posts

 **Lidman Anna**
Lead: Qualified b
On Lidman Anna

11. If you run into the following error, visit: [How to Address all Known Issues/errors When Qualifying a Lead to an Opportunity](#)

