

## Data8 Qualify Without Opportunity for Microsoft Dynamics 365

The Data8 Qualify Without Opportunity solution simply adds a “Qualified Without Opportunity” status reason to leads. Select this and your lead will be qualified as normal, with an account and/or contact record created, but no opportunity.

### Why?

Hopefully all your leads will be opportunities. But sometimes you need to be able to qualify a lead for some other reason.

Maybe you’re using a marketing automation solution or some other integration that adds new people as leads. If you find you already have other people at the same company in CRM as contacts, you probably want to convert the new lead into a contact at the same account. But you’re already trading with them, so there isn’t necessarily a new opportunity to create.

Maybe you’ve identified other people within the same organization that you want to keep linked together, but you haven’t hit that point in the relationship yet where you’re happy to say there is an opportunity according to how your company uses them.

Maybe you’ve identified a lead as being a duplicate of an existing contact and want to link them up.

Whatever the reason, you need to be able to qualify the lead without creating an opportunity.

### Why?

Creating opportunity records when there isn’t really an opportunity is annoying. It’s annoying to the user who’s got to tidy them up, either by deleting them or marking them as won or lost. It’s annoying to the BI analyst that’s got to account for spurious opportunity records in their reports. It’s annoying for the managers who can’t see the wood for the trees in the list of their team’s opportunities.

### Why?

It’s a free (yes, really!), quick, simple solution to install and start using.

Once installed, the “Qualify” button on the lead form will change into a drop-down list. You can select “Qualified” from the list and get the opportunity created same as before, or “Qualified Without Opportunity” if you don’t want one.