



## **Dynamics 365 / CRM / XRM Platform**



# **Qualify Lead**

# **User Guide**



### **CRM Versions Supported: 2013/2016/D 365**

Qualify Lead is an add-in component developed to address specific needs for Dynamics 365 / CRM. When qualifying a lead record, there is no longer get a dialogue asking which records to create (i.e., account and/or contact and/or opportunity). Instead, the qualification of a lead record will always result in the creation of an Opportunity.

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## Table of Contents

<b>COPYRIGHT .....</b>	<b>2</b>
<b>DISCLAIMER.....</b>	<b>2</b>
<b>INTRODUCTION .....</b>	<b>5</b>
<b>LICENSE KEY .....</b>	<b>6</b>
<b>INSTALLATION PROCESS .....</b>	<b>7</b>
Installing Licensing Solution.....	8
Installing Qualify Lead Solution .....	10
Activating License Key.....	12
<b>DYNAMICS 365 SOLUTION - TRIAL LICENSE ACTIVATION/ PRODUCT LICENSE PURCHASE/ ADDITIONAL USER LICENSE PURCHASE.....</b>	<b>14</b>
<b>QUALIFY LEAD SETTINGS.....</b>	<b>15</b>
Configuration Settings.....	16
CRM Form Settings.....	18
<b>QUALIFY LEAD FUNCTIONALITY .....</b>	<b>20</b>
Copy Notes.....	22
<b>QUALIFY LEAD FUNCTIONALITY – HOME GRID.....</b>	<b>23</b>
<b>UNINSTALLATION PROCESS .....</b>	<b>24</b>
<b>MTC OVERVIEW .....</b>	<b>25</b>
The Global CRM Community DynamicsExchange.com .....	25
End User License Agreement (EULA).....	26

## Table of Figures

Figure 1 : Developer Resources .....	6
Figure 2 : Organization Unique Name .....	6
Figure 3: To Import Solution .....	7
Figure 4 : Select Solution Package .....	8
Figure 5: Importing Options window .....	8
Figure 6: Import Option.....	9
Figure 7: Importing Solution – Licensing .....	9
Figure 8 : Select Solution .....	10
Figure 9: Solution Information .....	10
Figure 10: Import Option.....	11
Figure 11: Solution successfully imported .....	11
Figure 12: Lead Qualify Configuration .....	12
Figure 13: Placing of License Key .....	13
Figure 14: Lead Qualify Configuration .....	15
Figure 15: Available/ Selected Entities, and their Views.....	16
Figure 16: CRM Lead Form .....	18
Figure 17; Form Properties .....	19
Figure 18: View Leads screen.....	20
Figure 19: Qualify Button .....	20
Figure 20: Pop Up Qualify Lead Screen .....	21
Figure 21: Original Configuration Settings .....	22
Figure 22: Qualify Lead from Home Grid .....	23
Figure 23: Delete a solution .....	24
Figure 24: Uninstall solution .....	24

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## Introduction

When qualifying a lead record, There is no longer get a dialog asking which records we want to create (i.e.: account and/or contact and/or opportunity). Instead, the qualification of a lead record will always result in the creation of an Opportunity. But, for those looking to leverage the xRM framework, we consider this to be a major setback.

## License Key

- To install Qualify Lead for Dynamics 365 / CRM you will require License Key, which you can get by sending an E-mail request to **salesteam@mtccrm.com** with your Organization Unique Name.
- To access your Organization Unique Name Click on **Settings→Customizations→Developer resources** as shown below.

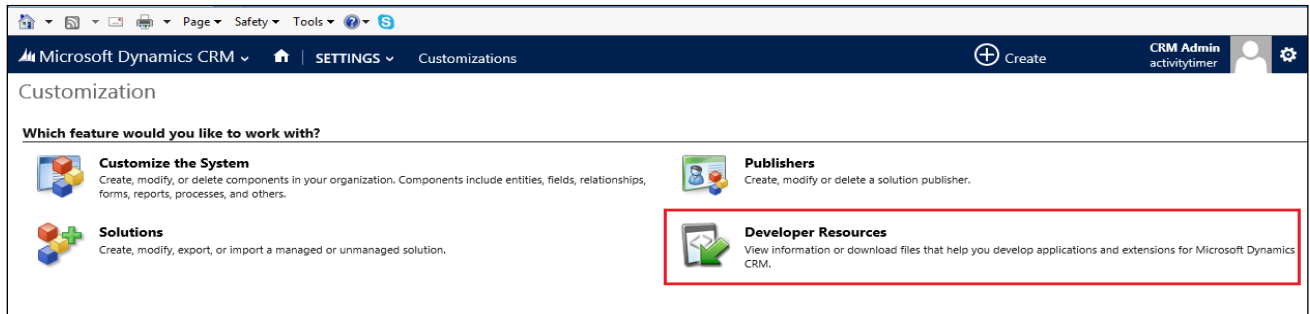


Figure 1 : Developer Resources

- A window will pop up with Organization Unique Name as shown below.

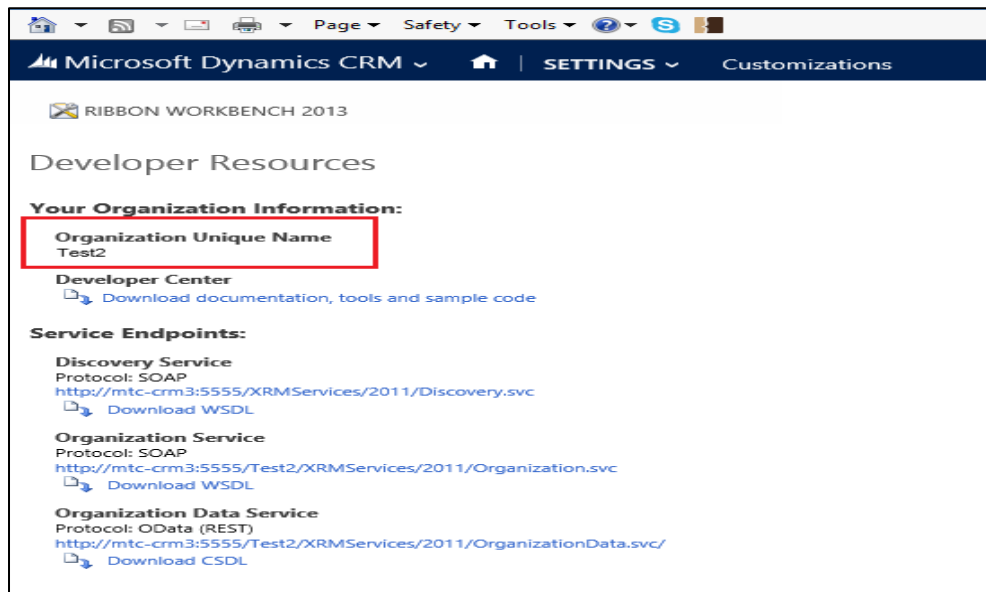


Figure 2 : Organization Unique Name

- Send this Organization Unique Name through Email and you will receive your Licensing Key within 24 hours.

**NOTE: After placing the request you will receive the LICENSE KEY within 24 hrs.**

## Installation Process

To install the Qualify Lead solution, the following steps are to be followed.

### STEP 1:

- Go to <http://www.mtccrm.com/QL.aspx> and click on Download Qualify Lead.

### STEP 2:

- On Downloading you will get LeadQualify\_1\_0\_0\_0\_managed.zip (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



Licensing\_1\_0\_3\_0\_managed.zip



LeadQualify\_MTC\_1\_0\_0\_0\_managed(18).zip

**NOTE: To install the Qualify Lead solution, user has to be import it into CRM**

### STEP 3:

- Open your CRM click on settings→solution→import it will open import Solution window.

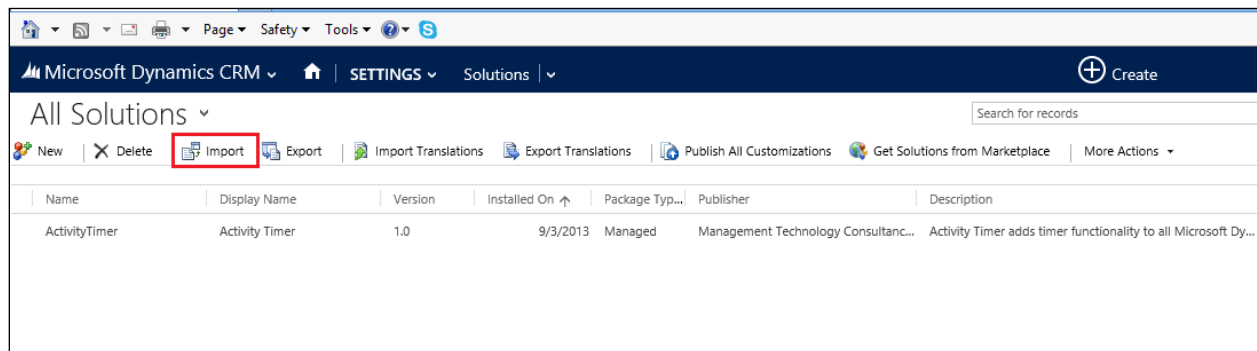


Figure 3: To Import Solution

- In Import Solution Window you can **browse** and Select Solution Package zip file and then click on **Next** for further processing.
- Firstly user needs to Import Licensing Solution and then Secondly import the Qualify Lead Solution.**

## Installing Licensing Solution

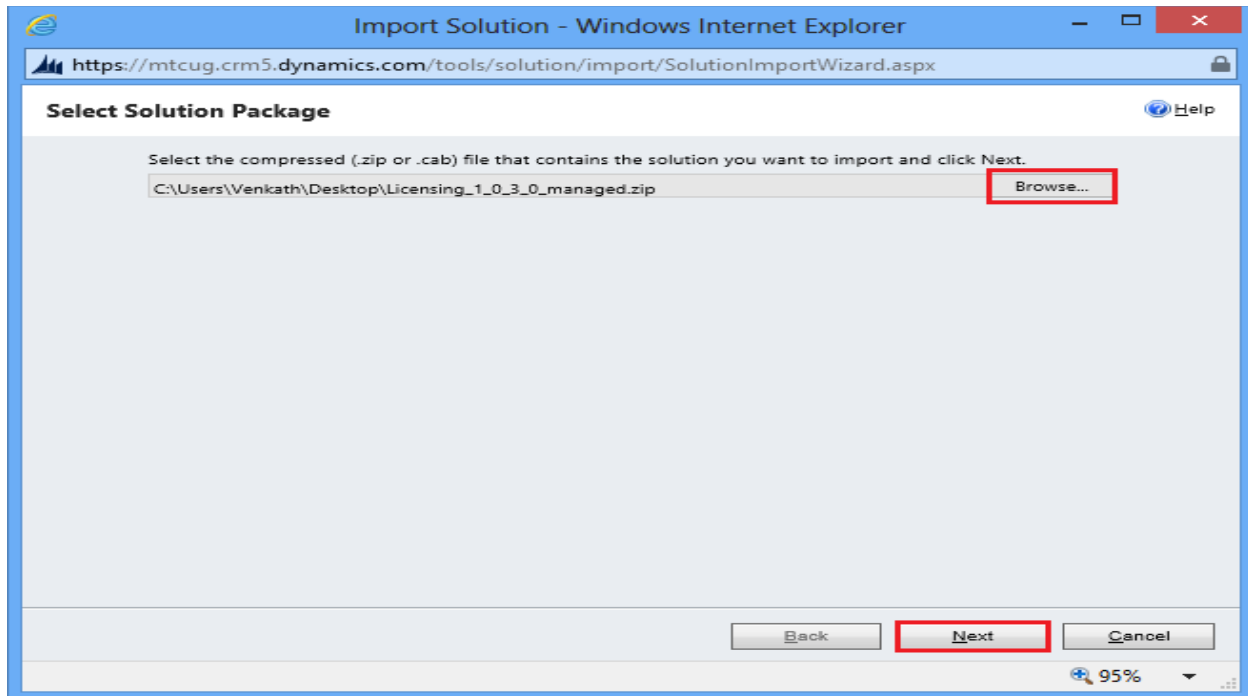


Figure 4 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

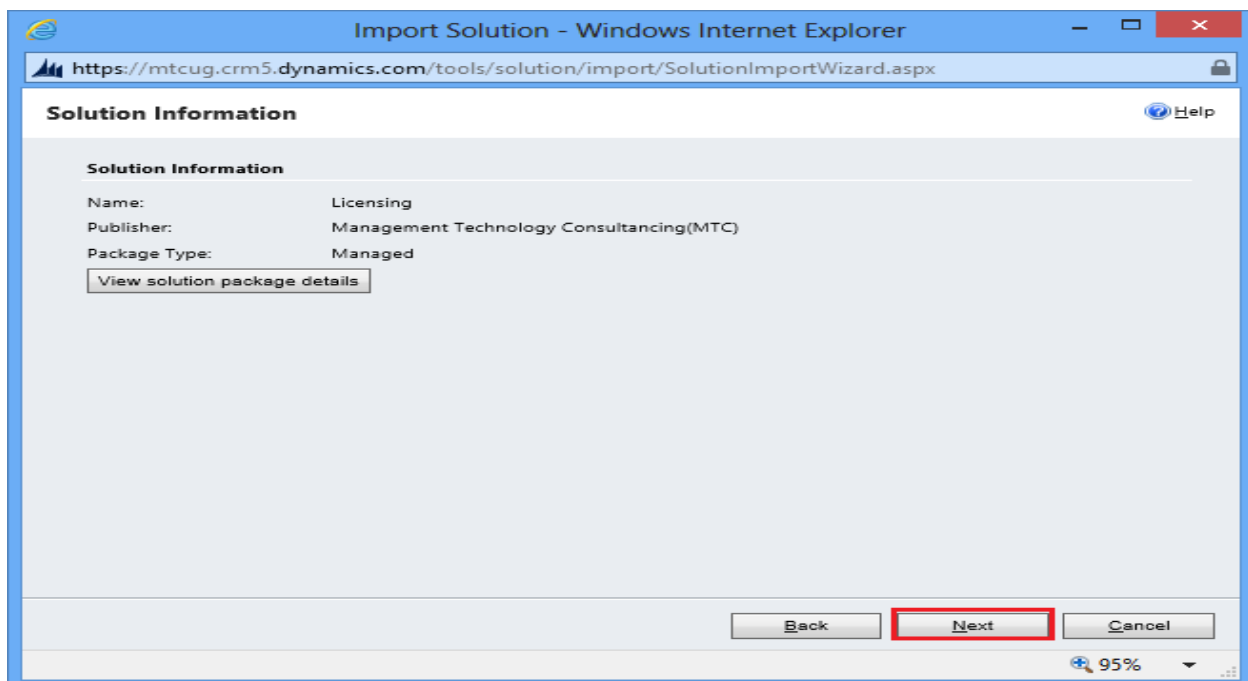


Figure 5: Importing Options window



- Click on Next to proceed.

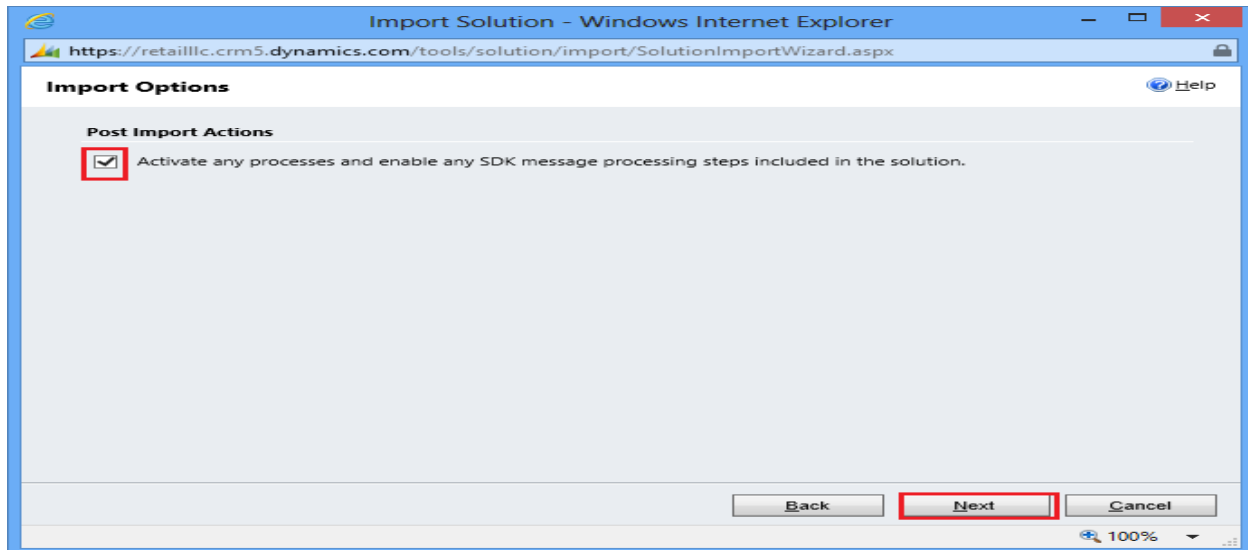


Figure 6: Import Option

- Click on Next to proceed.

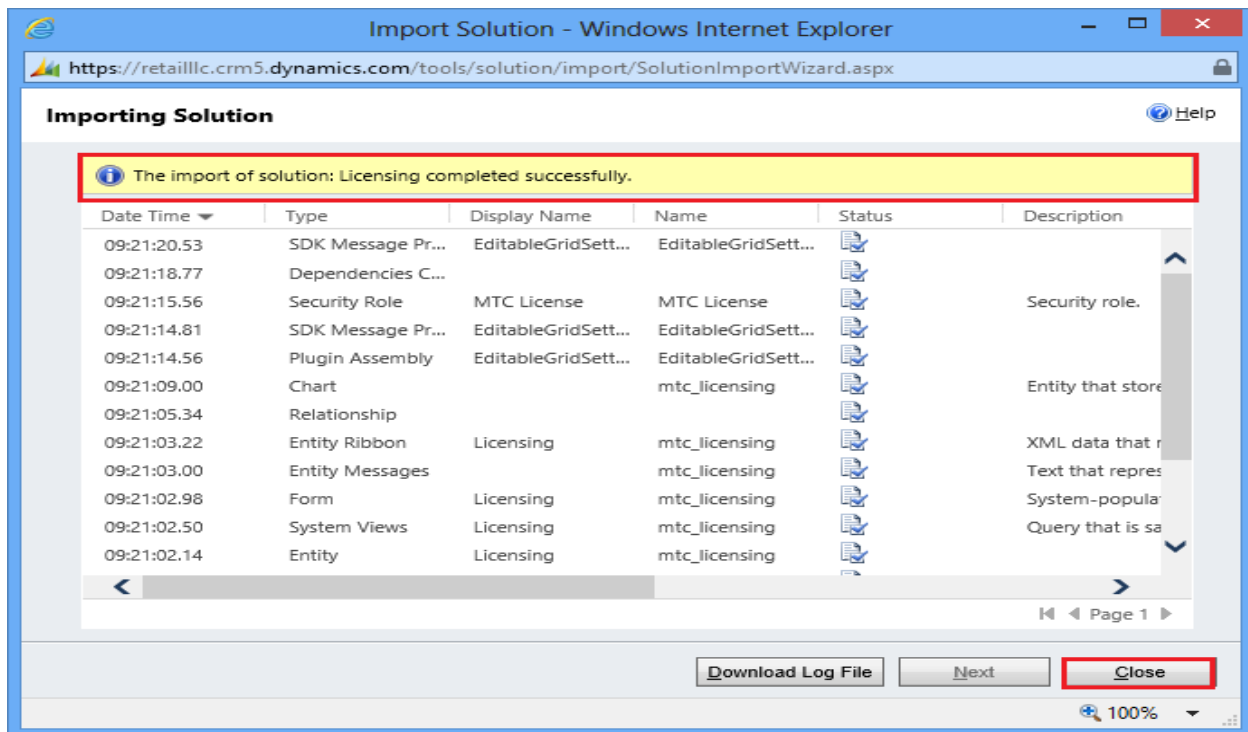


Figure 7: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

## Installing Qualify Lead Solution

- Import Qualify Lead Solution which you have downloaded.
- Open your CRM click on settings→solution→import it will open import Solution window.

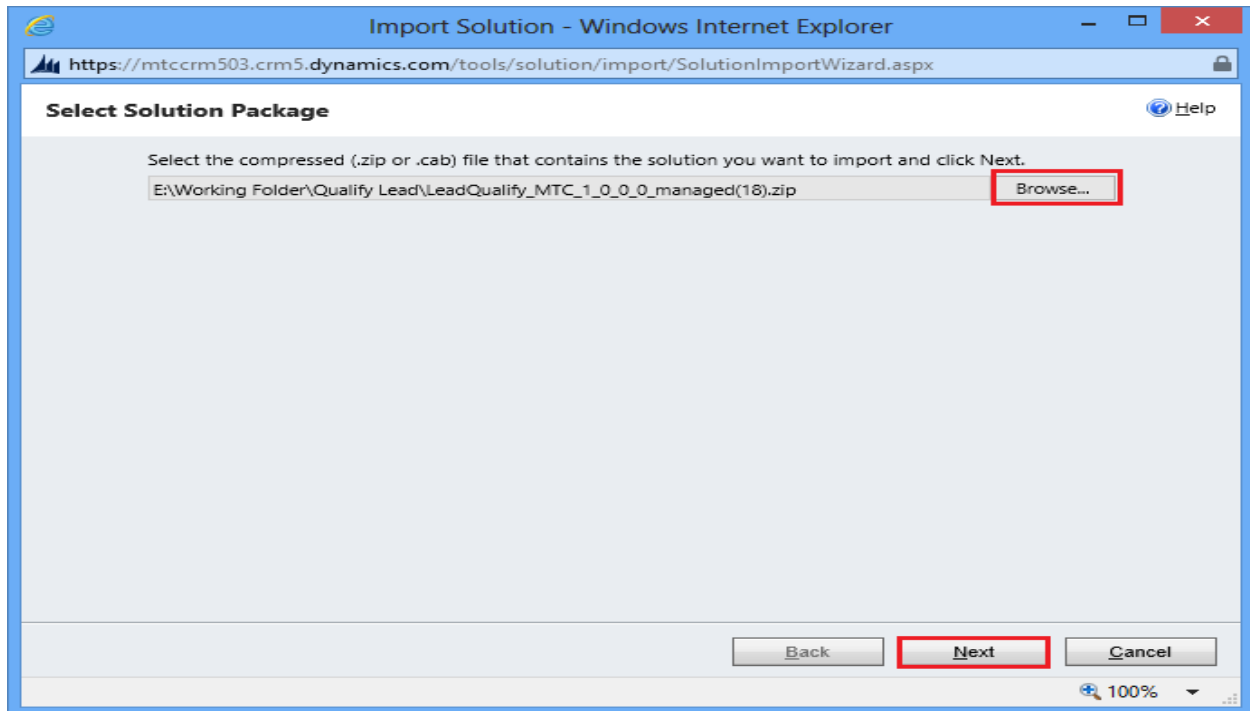


Figure 8 : Select Solution

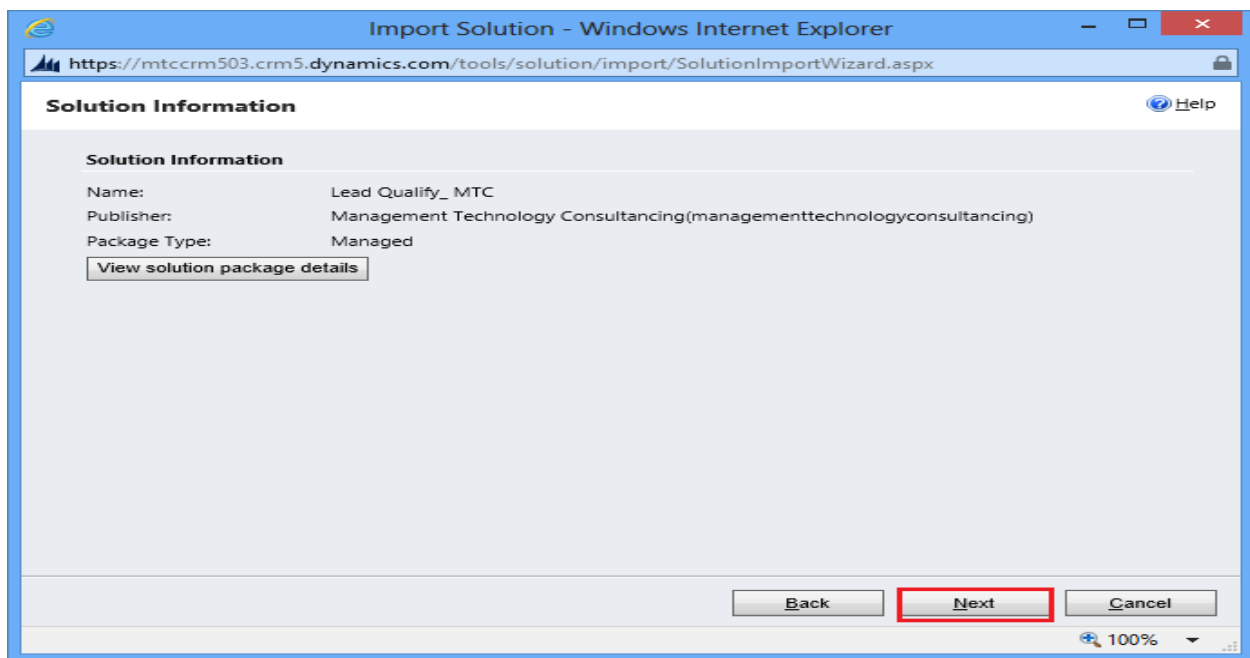


Figure 9: Solution Information

- Click on Next to proceed

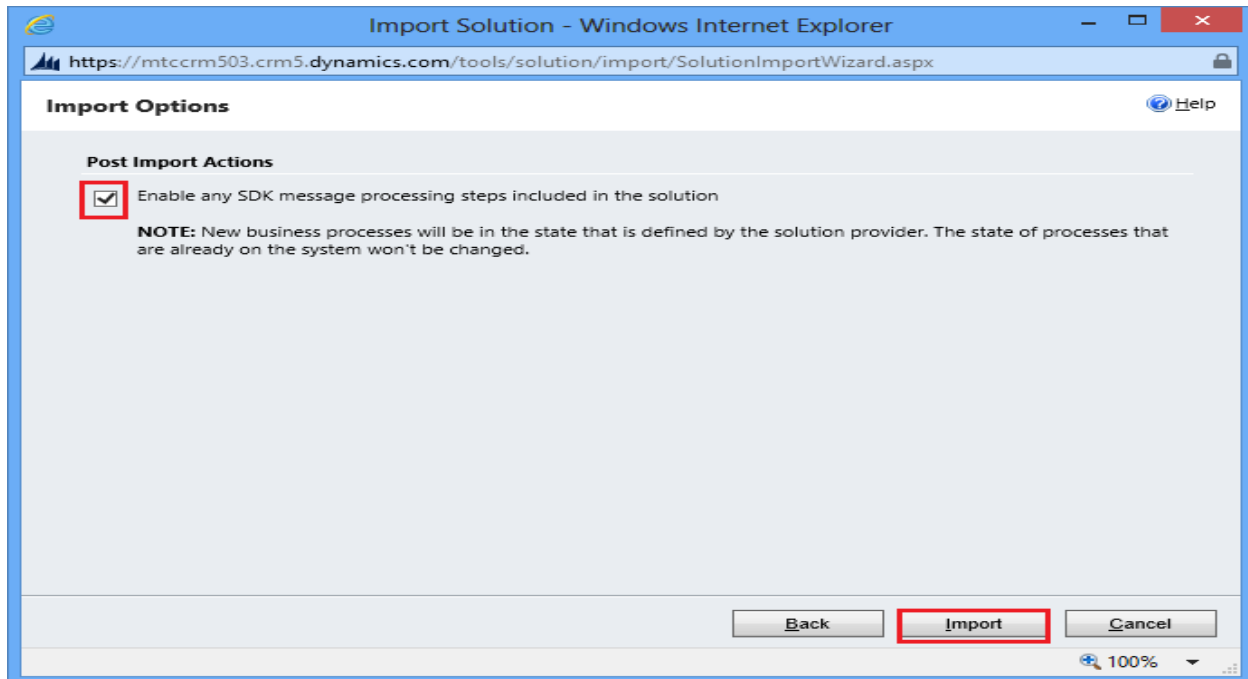


Figure 10: Import Option

- Click on Import to proceed

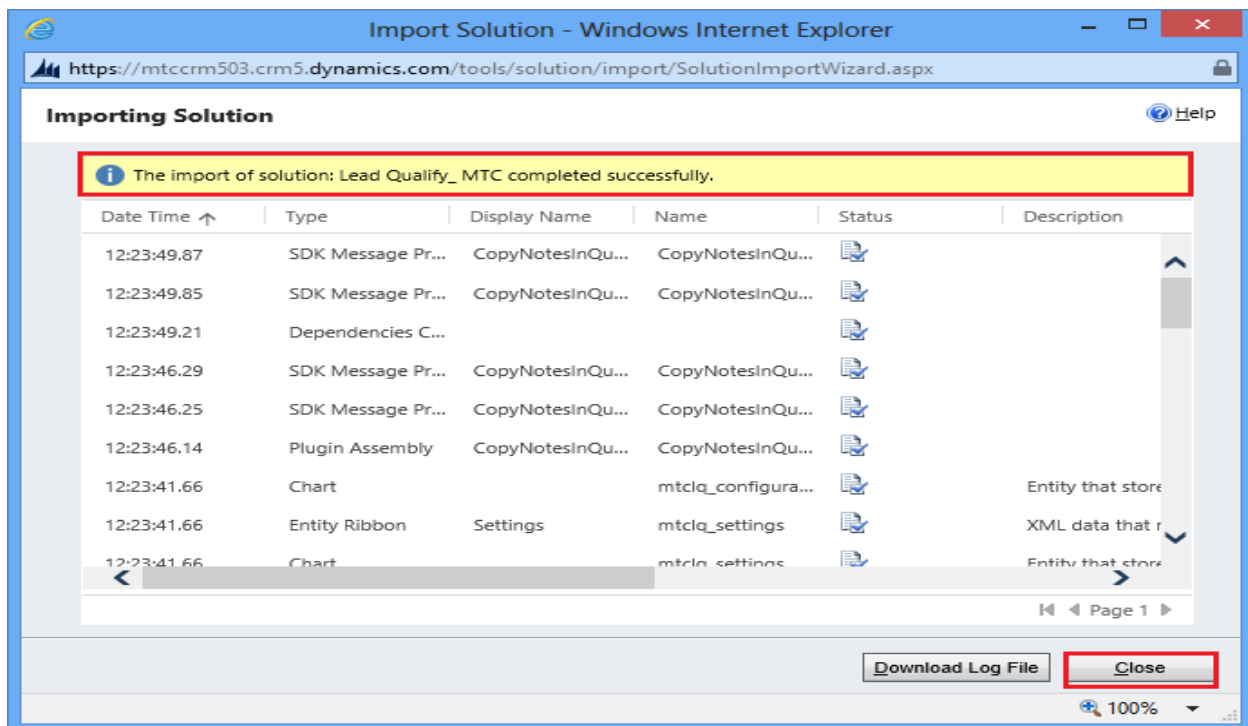
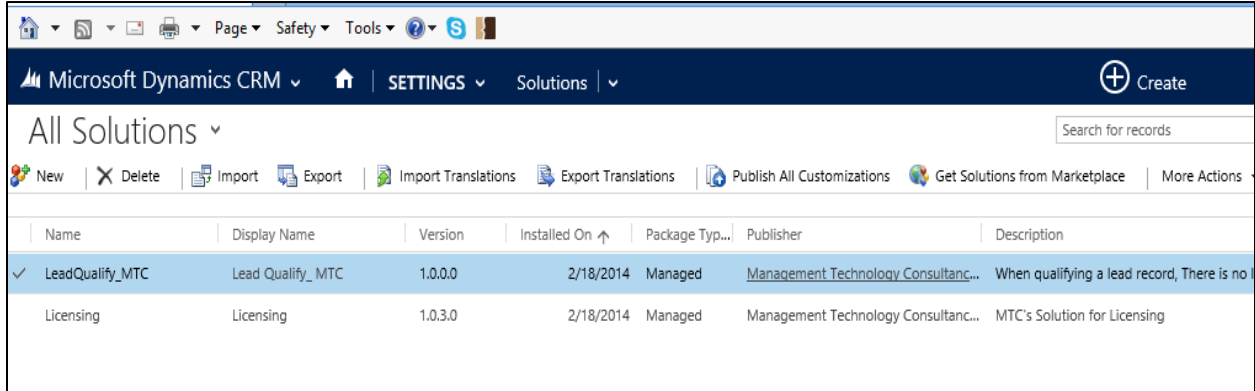


Figure 11: Solution successfully imported

- Click on Close to finish importing.

## Activating License Key

- CRM->Settings->Solutions-> double click on Qualify Lead Solution



Name	Display Name	Version	Installed On	Package Type	Publisher	Description
LeadQualify_MTC	Lead Qualify_ MTC	1.0.0.0	2/18/2014	Managed	Management Technology Consultanc...	When qualifying a lead record, There is no
Licensing	Licensing	1.0.3.0	2/18/2014	Managed	Management Technology Consultanc...	MTC's Solution for Licensing

- Click on Qualify Lead Solution , which opens a new screen as shown below

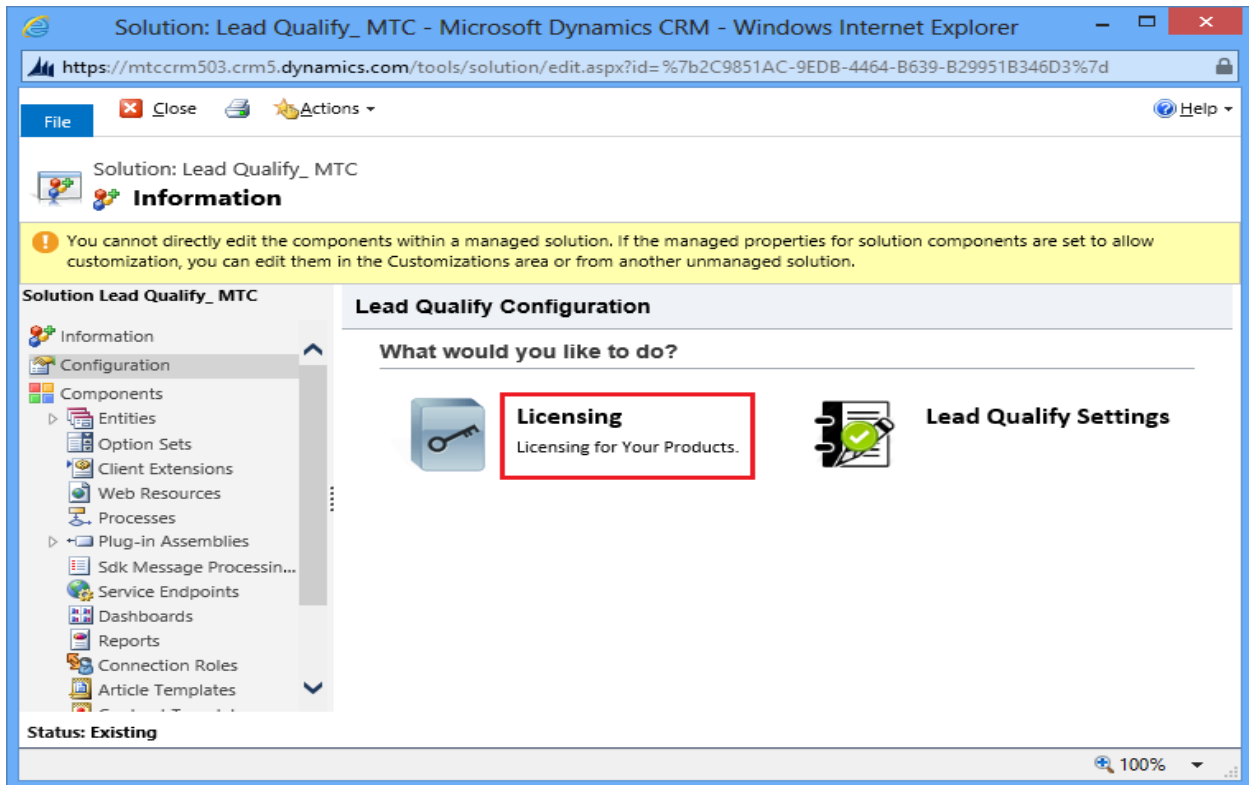


Figure 12: Lead Qualify Configuration

- Click on Licensing.

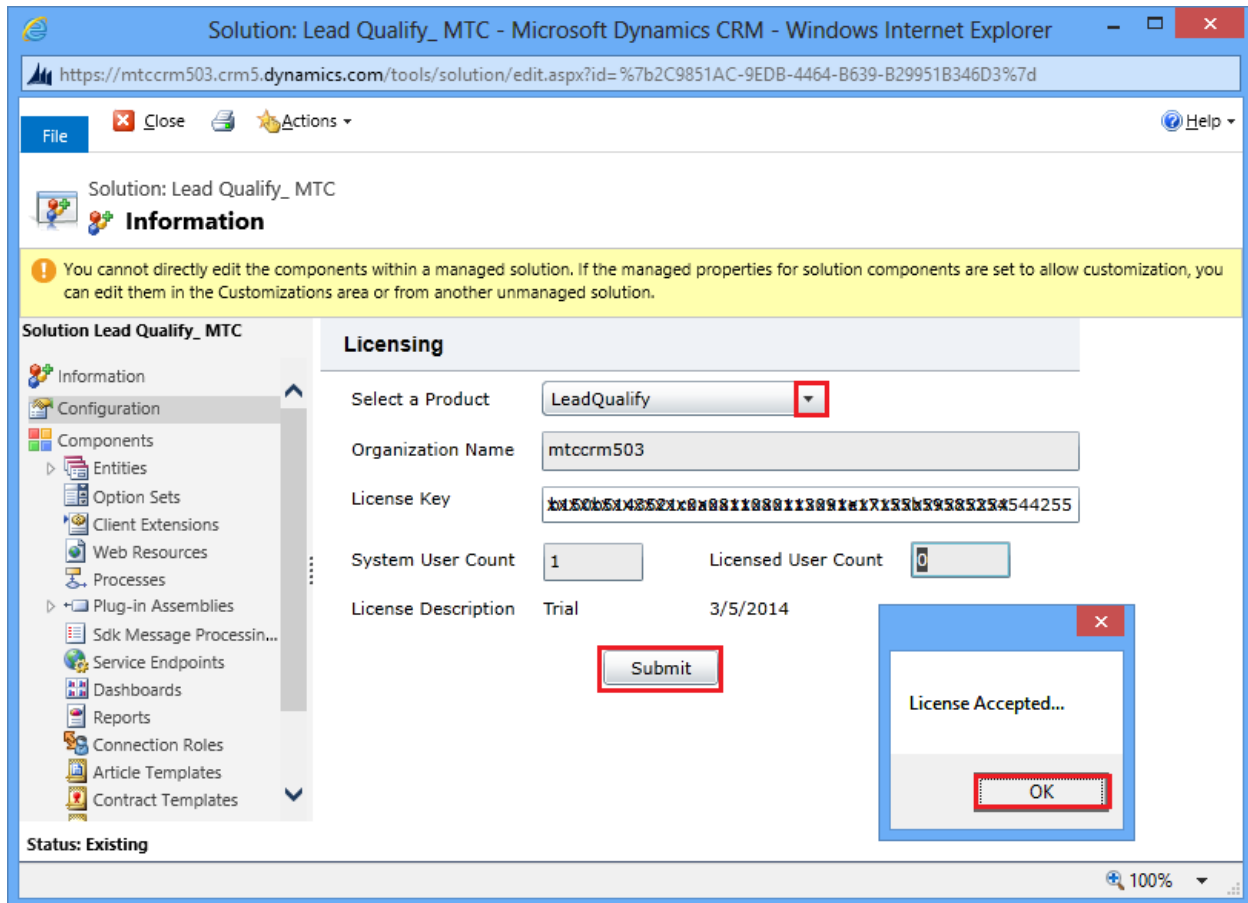


Figure 13: Placing of License Key

- Select Product as Lead Qualify.
- Copy & Paste the License key which you have received from salesteam@mtccrm.com.
- Click on Submit.
- A pop up window appears and displays the message as License Accepted. Click on OK.

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## Dynamics 365 Solution - Trial License Activation/ Product License Purchase/ Additional User License Purchase

Please refer the below link for Trial License Activation and/or Product License Purchase and/or Additional User License Purchase for MTC's Dynamics 365 Solution.

<https://www.mtccrm.com/PLI>

*In case of queries or issues, please write down to [salesteam@mtccrm.com](mailto:salesteam@mtccrm.com) for quick help.*

## Qualify Lead Settings

- CRM->Settings->Solutions-> Click on Qualify Lead Solution

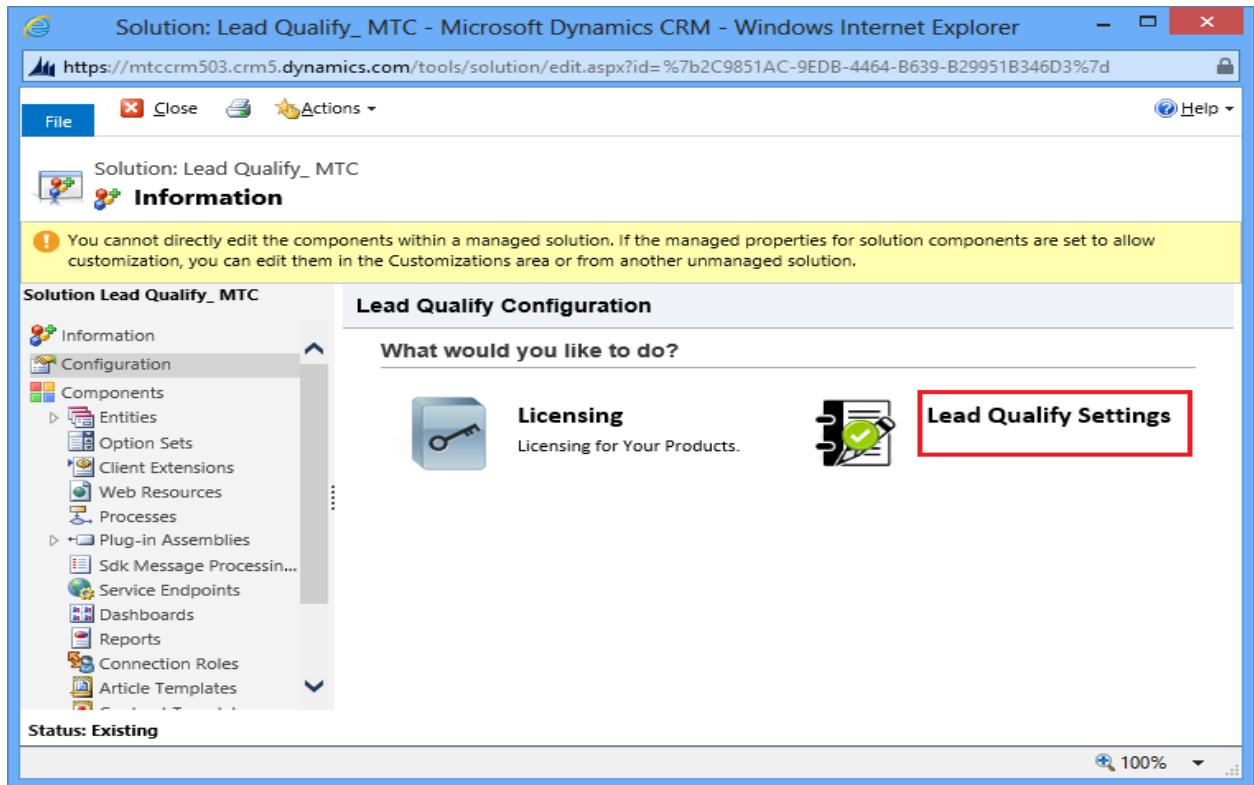


Figure 14: Lead Qualify Configuration

- Select & Click on Lead Qualify Settings.

## Configuration Settings

- A Qualify Lead Configuration details are shown
- All the Entities such as Account, Contact and Opportunity are listed for your ready reference

**Configuration Settings**

Popup Qualify Window <input checked="" type="checkbox"/>	
Create Account <input checked="" type="checkbox"/>	Open Account <input type="checkbox"/>
Create Contact <input type="checkbox"/>	Open Contact <input type="checkbox"/>
Create Opportunity <input checked="" type="checkbox"/>	Open Opportunity <input type="checkbox"/>

Copy Notes To

New Account <input checked="" type="checkbox"/>	Existing Account <input type="checkbox"/>
New Contact <input type="checkbox"/>	Existing Contact <input type="checkbox"/>
New Opportunity <input type="checkbox"/>	Existing Opportunity <input type="checkbox"/>

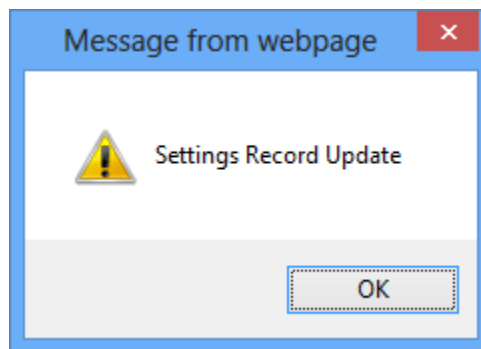
Save

Figure 15: Available/ Selected Entities, and their Views

- Select one or more entities that you would like to search (Users Choice)
- There are two Sections in this Setting Such as



- **Popup Qualify Window**
  - ✓ Select check box as shown above, if you want to have a pop up window whenever you activate the Qualify Lead option.
  - ✓ If you want to create an Account or Contact or Opportunity then click to check the box against each entity name.
  - ✓ If Open Account, Contact or Opportunity are also checked, it helps in automatically to open that particular form/ record when qualified or created.
- **Copy Notes to**
  - ✓ Similar to above function, if you would to copy Notes from Lead to particular entities then click or check the box placed against each entity
  - ✓ Here the user has two options such as Copy Notes to New Account only or Copy Notes to Existing accounts also.
  - ✓ Similar to Account entity you can also copy Notes to Contact or Opportunity
- On Completion of your selection, do click on save button placed at Bottom right Corner to save the options opted for.



- Click OK to continue.

## CRM Form Settings

- This setting is compulsory to activate and to use this Add-on product Qualify Lead.
- Go to CRM->Sales->Lead
- Open any lead form initially
- Click on more (...) to get drop down list and select Form Editor as shown below.

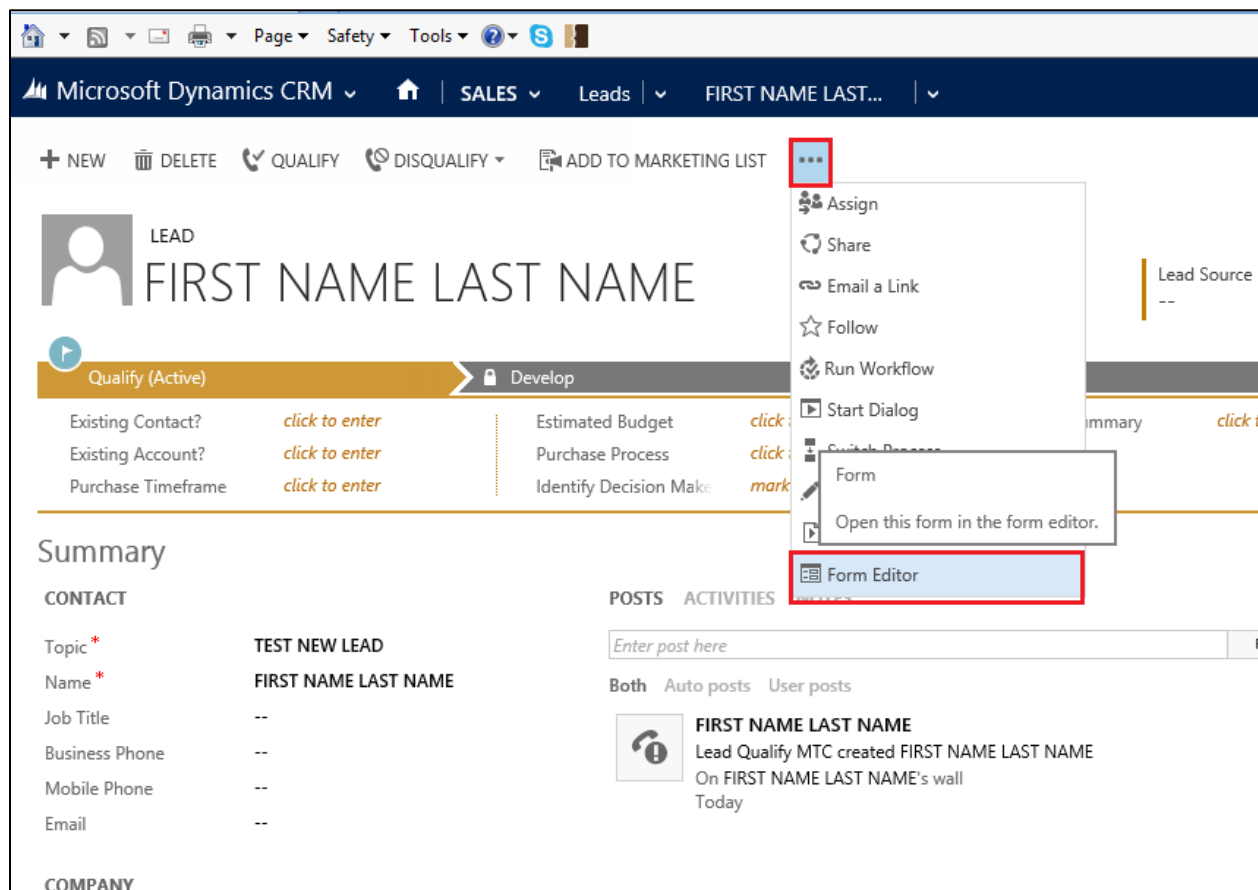


Figure 16: CRM Lead Form

- Now Click on Form Properties to open a new pop up window

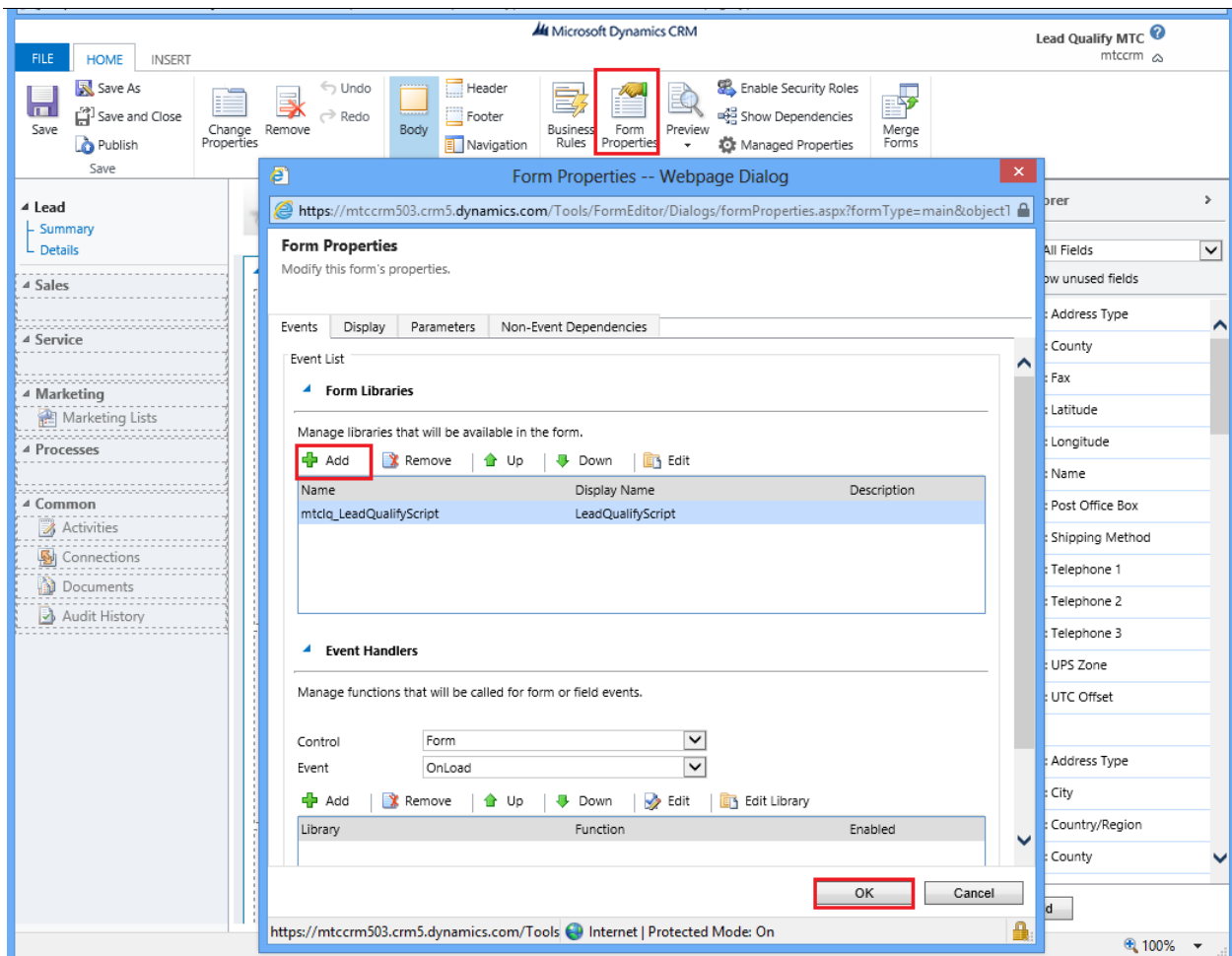


Figure 17; Form Properties

- Click on Add button under Form Libraries
- Select “**mtclq\_LeadQualifyScript**” from the Lookup records
- Click Ok to Continue to use this Qualify Lead solution.

**NOTE: This form setting in the CRM is a must. The Qualify Lead solution will not work without doing this setting.**

## Qualify Lead Functionality

- To access go to **CRM->Sales->Lead-** to display “MY Leads”
- All the existing leads are displayed
- Click on desired lead to open its page

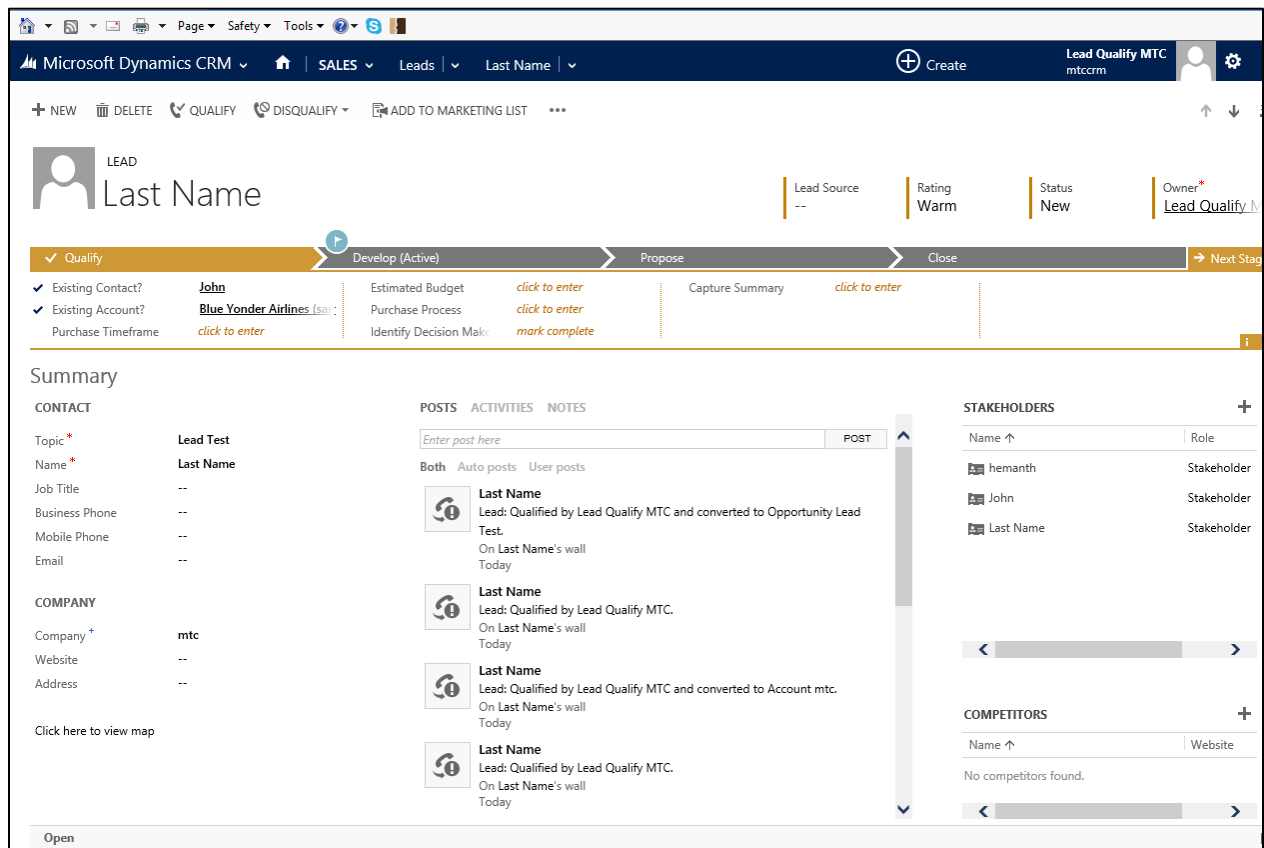


Figure 18: View Leads screen

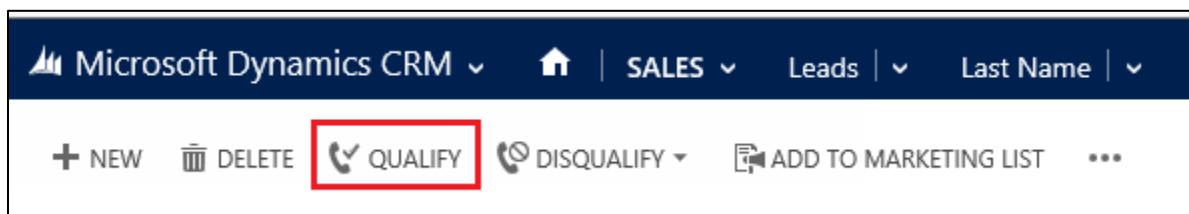
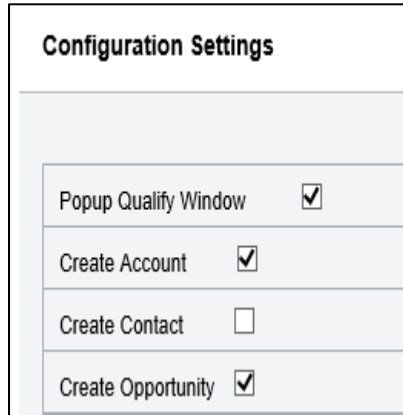


Figure 19: Qualify Button

- Click on Qualify button as shown above to qualify the selected lead in CRM

In the user had made the Configuration settings as Popup Qualify Window as true then the same pop window is (As shown below)

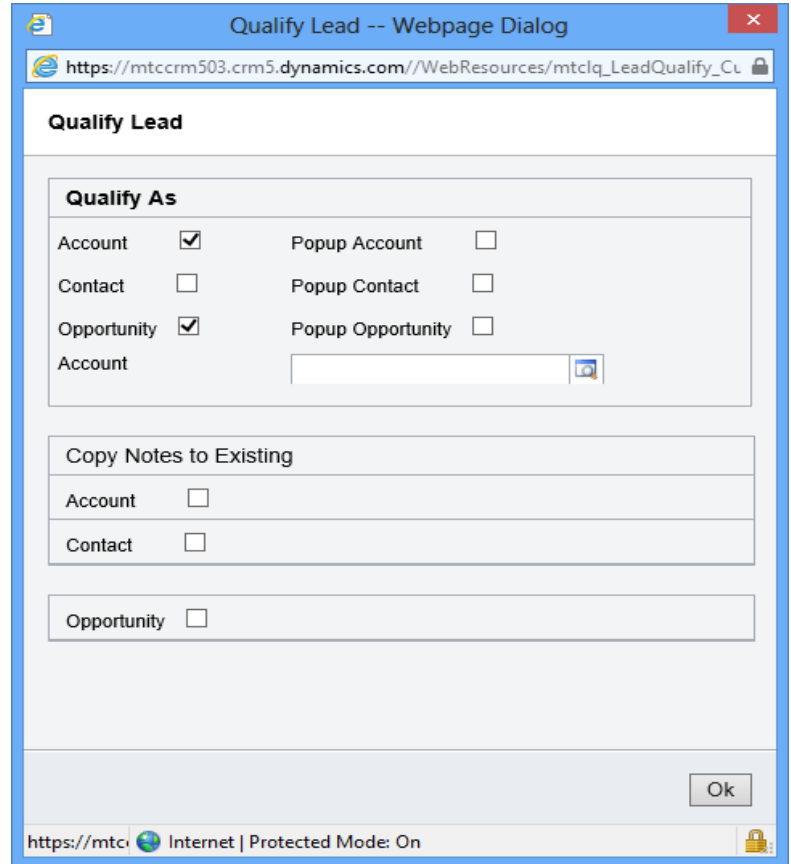


Configuration Settings	
Popup Qualify Window	<input checked="" type="checkbox"/>
Create Account	<input checked="" type="checkbox"/>
Create Contact	<input type="checkbox"/>
Create Opportunity	<input checked="" type="checkbox"/>

### Note:

If popup qualify window is true

- You can select the Entities such as Accounts, Contact etc.
- If the Popup Qualify Window is not true then all the selected entities will be as per original configuration settings – The process is done internally without any display.



Qualify Lead -- Webpage Dialog

https://mtccrm503.crm5.dynamics.com/WebResources/mtclq\_LeadQualify\_Cu

**Qualify Lead**

**Qualify As**

Account	<input checked="" type="checkbox"/>	Popup Account	<input type="checkbox"/>
Contact	<input type="checkbox"/>	Popup Contact	<input type="checkbox"/>
Opportunity	<input checked="" type="checkbox"/>	Popup Opportunity	<input type="checkbox"/>

Account

Copy Notes to Existing

Account	<input type="checkbox"/>
Contact	<input type="checkbox"/>
Opportunity	<input type="checkbox"/>

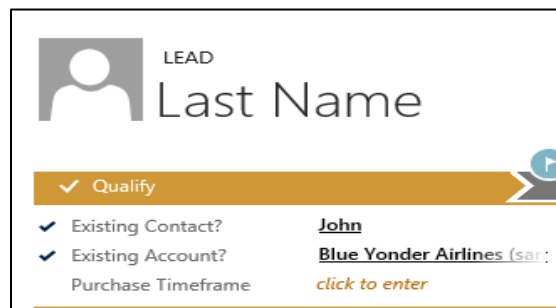
Ok

https://mtc Internet | Protected Mode: On

Figure 20: Pop Up Qualify Lead Screen

- If the user has opted for pop up menu then he can add or remove the setting in this Lead form during the qualify lead operation.
- Any changes made in the Pop up screen is not stored in Configuration settings, (this will be only to this specific record or form)

Once the Lead is Qualified, the same can be seen on the main form as shown below



LEAD

Last Name

✓ Qualify

✓ Existing Contact? John

✓ Existing Account? Blue Yonder Airlines (sa)

Purchase Timeframe click to enter

## Copy Notes

- Earlier in the Configuration setting we had selected the following as shown below

**Configuration Settings**

Popup Qualify Window <input checked="" type="checkbox"/>	
Create Account <input checked="" type="checkbox"/>	Open Account <input type="checkbox"/>
Create Contact <input type="checkbox"/>	Open Contact <input type="checkbox"/>
Create Opportunity <input checked="" type="checkbox"/>	Open Opportunity <input type="checkbox"/>

Copy Notes To

New Account <input checked="" type="checkbox"/>	Existing Account <input type="checkbox"/>
New Contact <input type="checkbox"/>	Existing Contact <input type="checkbox"/>
New Opportunity <input type="checkbox"/>	Existing Opportunity <input type="checkbox"/>

Save

Figure 21: Original Configuration Settings

- In this case the User has selected only New Account for the Copy Notes to function.
- When the record is put to qualify proceed the Note gets attached only to New Account
- If the User intends to copy Notes to Existing Accounts or Existing Contacts if any, then the user has to either change the Setting permanently in Configuration setting screen or temporarily select them in the Pop up screen during the operation.

## Qualify Lead Functionality – Home grid

- Go to **CRM->Sales->Lead-** to display My Open Leads
- Select any of the Lead (Only one lead to be selected else it throws an error message to select any one Lead at a time)
- Select a Lead
- Click on Qualify button on the ribbon as above below

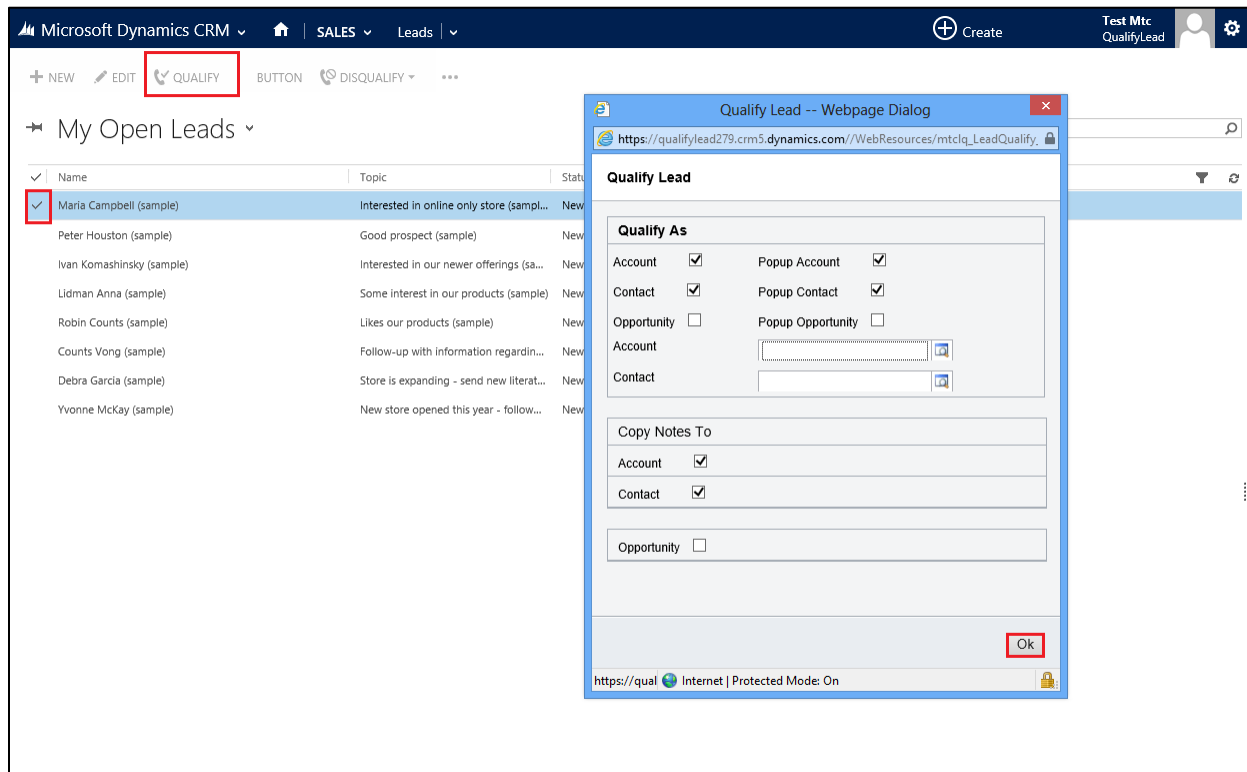


Figure 22: Qualify Lead from Home Grid

- A pop up screen opens as shown above to qualify the lead.

## Uninstallation Process

- Firstly open the Form properties form (open this being in the Lead form and by clicking on Form Properties).
- Select “**mtclq\_LeadQualifyScript**” from form properties
- Click on Remove button to remove this solution
- Now Open CRM on your system with right credentials. Click on **settings→solution**

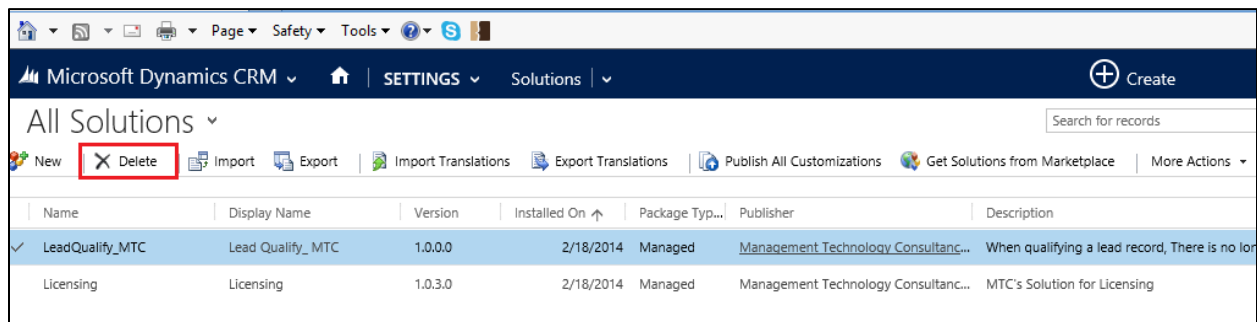


Figure 23: Delete a solution

- Select the required Solution by selecting the check box
- Click on Delete button on the ribbon as shown above

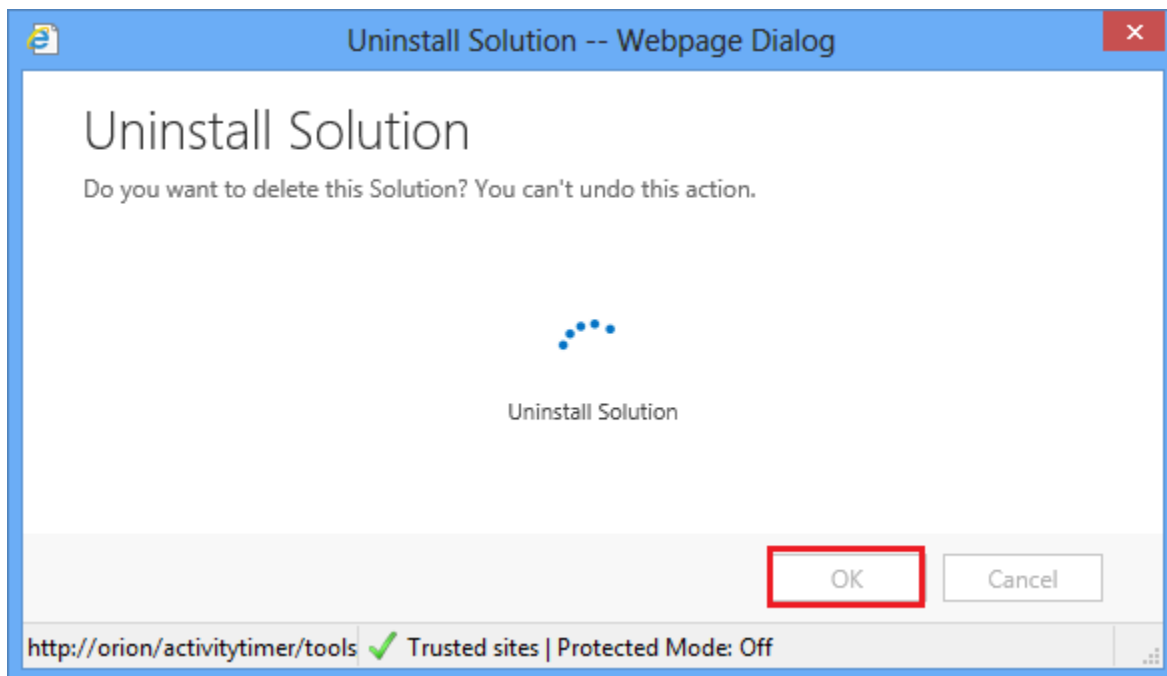


Figure 24: Uninstall solution

- Click Ok to uninstall solution from CRM



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## MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Dynamics 365 / CRM platform. MTC supports a product development effort with a highly efficient global Dynamics 365 / CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Dynamics 365 / CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



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14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.
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### **F. Customer Care details**

MTC is always open to global community of Dynamics 365 / CRM platform Software Users



**Availability and hours of operation: Monday to Friday**  
**USA PST 323-851-5008 - 8:00 AM to 6:00 PM**  
**India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST**

**USA Headquarters:**  
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