

How to add new lead Source in Dynamics 365?

After [creating a Lead](#) we have to add new lead Source in Dynamics 365. A lead source can be from web, Advertisement, referral, friend and so on. Lead source field is very useful for an organization. We can easily add Lead Source field from the drop down shown below. The Lead Source drop-down list, offers a great way of running reverse metrics on a trade show or seminar.

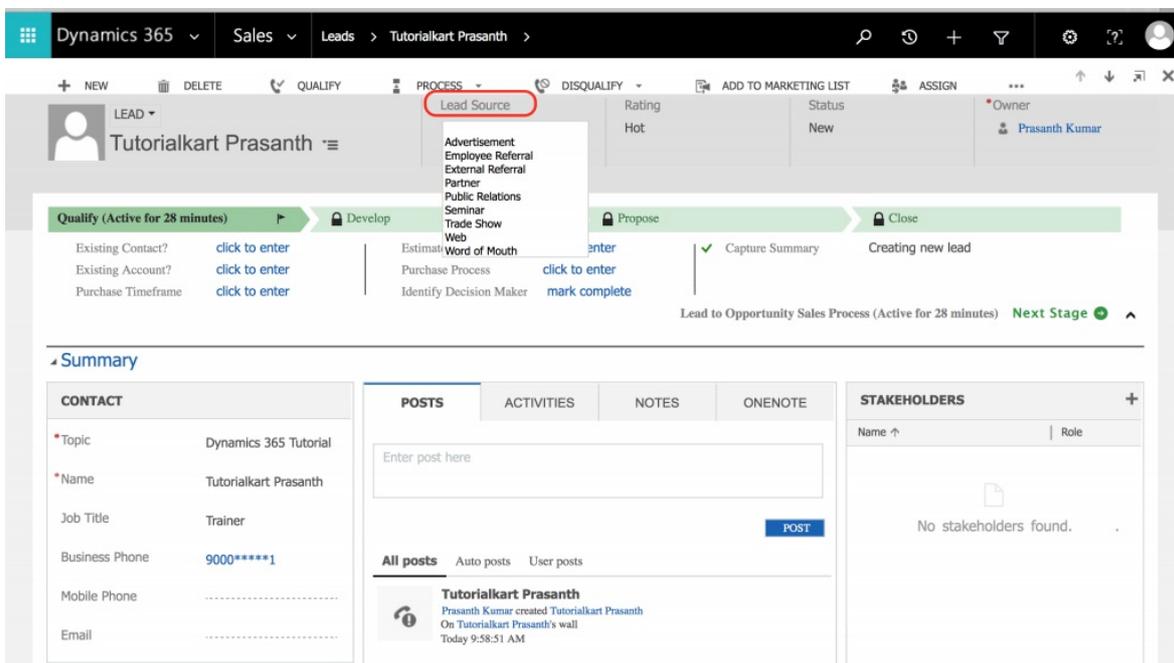
How to add new lead Source in Dynamics 365?

The Header section of the lead form enables you to set the Lead owner, by default the lead owner will be the user who created the record, as well as the status reason, lead source, and rating. The bottom left of the form shows the status reason. When you're working with unqualified or new leads, the status reason enables you to select whether the lead is new or contacted. When a lead is converted, the status reason changes to Qualified if the lead was converted to a customer, or it changes to the reason it was disqualified (as selected during the conversion process).

Adding new Lead Source in Microsoft Dynamics 365

To add lead source navigate to [Dynamics 365 | Sales | Lead | lead name | Lead source](#).

- Click on Lead Source and select source from the drop down.



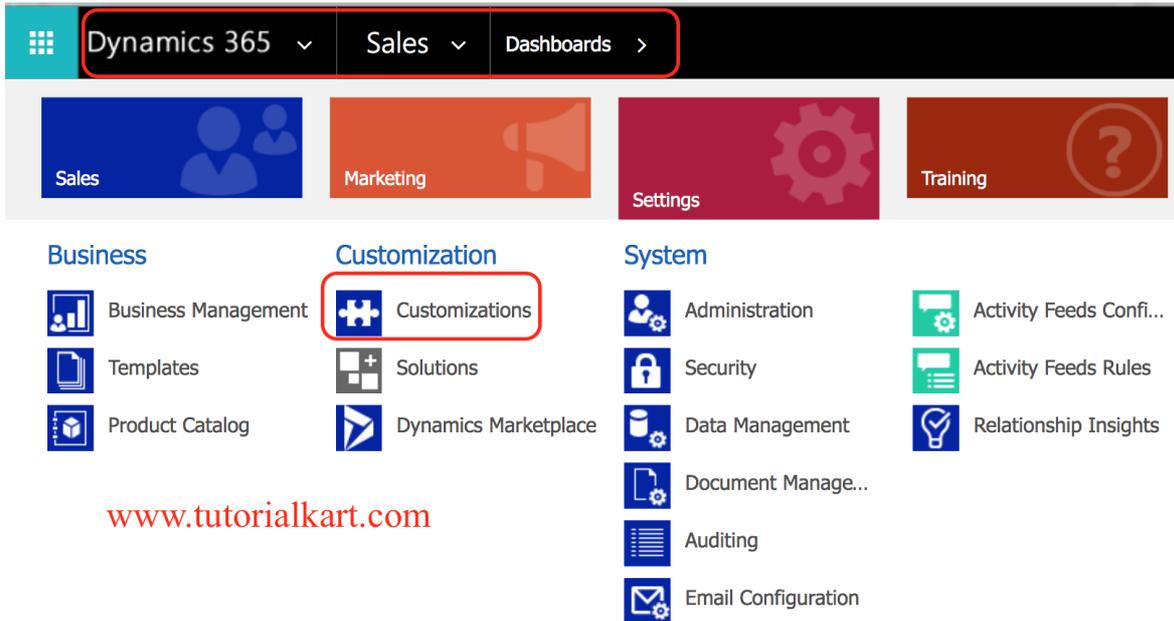
The screenshot shows the Microsoft Dynamics 365 interface for a Lead record. The breadcrumb navigation at the top reads: Dynamics 365 > Sales > Leads > Tutorialkart Prasanth. The main header area includes buttons for NEW, DELETE, QUALIFY, PROCESS, DISQUALIFY, ADD TO MARKETING LIST, ASSIGN, and more. The 'PROCESS' dropdown menu is open, and the 'Lead Source' option is highlighted with a red circle. The dropdown menu lists the following options: Advertisement, Employee Referral, External Referral, Partner, Public Relations, Seminar, Trade Show, and Web. Below the header, the lead details for 'Tutorialkart Prasanth' are visible, including fields for Existing Contact?, Existing Account?, and Purchase Timeframe. The 'Summary' section shows contact information and a 'POSTS' tab with a recent post by 'Tutorialkart Prasanth'.

You can easily add to this drop-down list by customizing the lead source code attribute, adding specific events that your company might sponsor or attend.

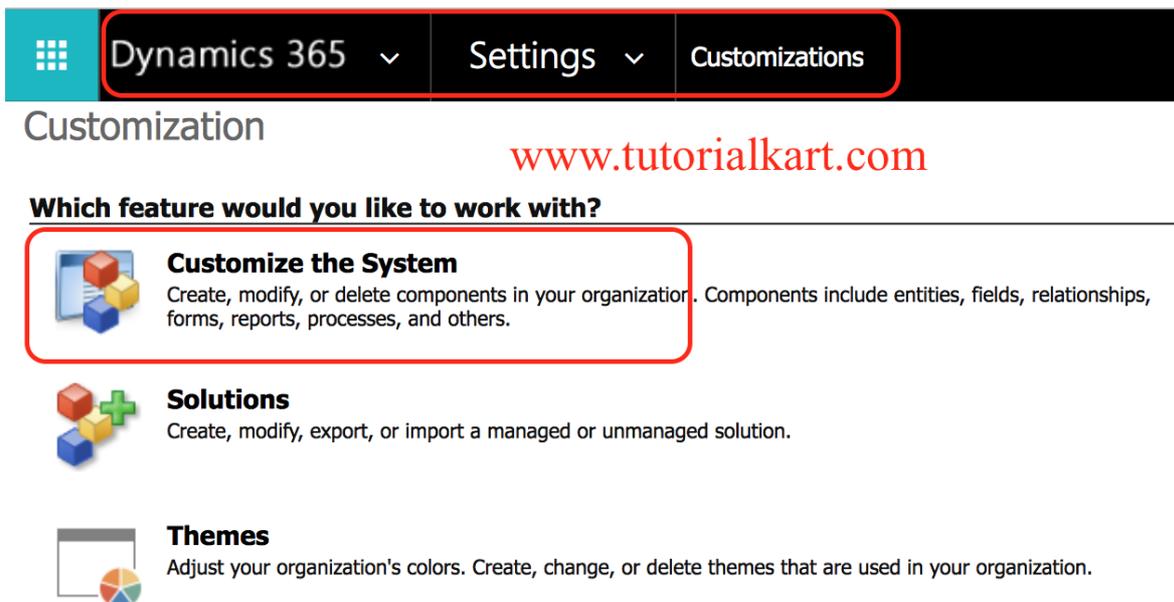
Customizing Lead source option in Microsoft Dynamics 365

To customize lead source option in Microsoft Dynamics 365, navigate to Settings | Customisations | Customize the system | Customize lead Entity.

- Click on Customizations as shown below.



- Now click on Customize the system.



- Now on the left sidebar navigate to Lead | Fields | Field Source.



SOLUTION DEFAULT SOLUTION

View: All

New X Edit More Actions -

Name	Schema Name	Display Name	Type	Field Type	State	Field Security	Audit
lastusedincampaign	LastUsedInCampaign	Last Campai...	Date and TL...	Simple	Managed	Disabled	Enabled
leadid	LeadId	Lead	Primary Key	Simple	Managed	Non Applica...	Non Applica
leadqualitycode	LeadQualityCode	Rating	Option Set	Simple	Managed	Disabled	Enabled
<input checked="" type="checkbox"/> leadsourcecode	LeadSourceCode	Lead Source	Option Set	Simple	Managed	Disabled	Enabled
masterid	MasterId	Master ID	Lookup	Simple	Managed	Non Applica...	Enabled
merged	Merged	Merged	Two Options	Simple	Managed	Non Applica...	Enabled
middlename	MiddleName	Middle Name	Single Line ...	Simple	Managed	Non Applica...	Enabled
mobilephone	MobilePhone	Mobile Phone	Single Line ...	Simple	Managed	Disabled	Enabled
modifiedby	ModifiedBy	Modified By	Lookup	Simple	Managed	Non Applica...	Non Applica
modifieddate	ModifiedOn	Modified On	Date and TL...	Simple	Managed	Non Applica...	Non Applica

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- Click on **Edit** button to create new Lead Source.

File Save and Close Show Dependencies Managed Properties Help

Field **Lead Source of Lead** Working on solution: Default Solution

Common

- Information
- Business Rules

General

Enabling field security? [What you need to know](#)

Auditing *****
 Enable Disable

This field will not be audited until you enable auditing on the entity.

Description
 Select the primary marketing source that prompted the lead to contact you.

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type *

Field Type *

Use Existing Option Set Yes No

Default Value

Options

- Employee Referral
- External Referral
- Partner
- Friend**
- Public Relations
- Seminar
- Trade Show
- Web
- Word of Mouth
- Other

Label *

Value *

Description

Color

- Go to options section and click on + button to create new custom Lead source.
- After click item will be added in the list and click on the item and rename Label as desired.
- Now click on Save button.

Dynamics 365 Sales Leads Tutorialkart Prasanth

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NEW **DELETE** **QUALIFY** **PROCESS**

LEAD **Tutorialkart Prasanth** **Lead Source Friend**

In this Dynamics 365 tutorial, we have learned about how to add new lead Source in Dynamics 365 and in our Upcoming Dynamics 365 tutorial, we will learn about converting leads.

Microsoft Dynamics 365 Basics

- ◆ What is Microsoft Dynamics 365?
- ◆ Microsoft Dynamics CRM Modules.
- ◆ Navigation and User Interface
- ◆ What is an Entity?
- ◆ What is Solution?
- ◆ What are Web Resources?
- ◆ What is a site map Designer?

Microsoft Dynamics 365 for Sales

- ◆ Dynamics 365 for Sales Basics
- ◆ How to create an Entity in Dynamics CRM?.
- ◆ Creating Entity Form in Dynamics CRM
- ◆ Different Sales Module Entities
- ◆ How to create a lead.
- ◆ How to create an opportunity?
- ⇒ **How to add a Lead Source?**
- ◆ How to convert a lead to an Opportunity.
- ◆ Relationships in Dynamics CRM : 1:N, N:1, N:N

Microsoft Dynamics 365 for Service.

- ◆ Service Dashboards.
- ◆ Service Reports

Microsoft Dynamics 365 for Marketing.

- ◆ Marketing Module Entities
- ◆ Marketing Dashboards.
- ◆ Marketing Reports