

MS Dynamics CRM Conversica Fields and Statuses

Review the information below to understand the different Conversica fields that will be updated as we receive, process, and message your Leads. These custom fields can be used for both reporting purposes and for increased visibility to your reps on a specific Lead or Contact in Microsoft Dynamics CRM.

Custom Fields for MS Dynamics CRM Leads/Contacts

Property Name	Type	Description	Notes/Comments
Conversica Action Required	Two Options	Checked if the Lead replied in a manner that Conversica has identified needs to be reviewed by a rep. Conversica will no longer message this Lead unless they reply and indicate interest.	Existing
Conversica Action Required Date	Date and Time	Date and time a Lead was last flagged as needing further review.	Existing
Conversica Do Not Email	Two Options	This field will be updated by Conversica if the Lead asks to be removed from future emails. If updated, Conversica will not engage with this Lead, even if added to another Conversation.	Existing
Conversica Skip To Follow Up	Two Options	If checked, Conversica will wait your Hot window duration then follow-up with the Lead to ensure they received all the information they were looking for.	Existing
Conversica Discovered Phone 1	Single Line of Text	If a new phone number is detected in a Lead's response, this field will be populated with the additional number.	Existing
Conversica Discovered Phone 2	Single Line of Text	If a second new phone number is detected in a Lead's response, this field will be populated with the additional number.	Existing
Conversica Conversation History	Multiple Lines of Text	All messages sent to or received from the Lead through Conversica for the most recent Conversation.	Existing

Conversica Hot Lead	Two Options	Checked if the Lead is a Conversica Hot Lead.	Existing
Conversica Hot Lead Date	Date and Time	Date and time a Lead became a Conversica Hot Lead.	Existing
Conversica Stop	Two Options	If selected in Dynamics CRM, Conversica will stop all messaging to the Lead.	Existing
Conversica Further Action	Two Options	Checked if the Lead is determined by your Conversica Assistant to have further questions or that they are waiting on actions from their assigned contact.	New
Conversica Further Action Date	Date and Time	Date and time the Lead became a Conversica Further Action lead.	New
Conversica Lead at Risk	Two Options	Checked if the Lead is a Conversica Lead at Risk.	Existing
Conversica Lead at Risk Date	Date and Time	Date and time a Lead became a Conversica Lead at Risk.	Existing
Conversica Lead Status	Single Line of Text	Identifies the actionable label of the Lead, for example if they are a Hot Lead, a Lead at Risk, or if the response needs to be reviewed by a rep or manager.	Updated! – Includes new Status values
Conversica Lead Status Date	Date and Time	Date and time the Lead Status was updated.	Existing
Conversica Conversation Stage	Single Line of Text	Defines the grouping of the Lead Stage, indicating where the Lead is in a conversation.	Existing
Conversica Conversation Stage Date	Date and Time	Date and time the Lead Stage was last updated.	Existing
Conversica Conversation Status	Single Line of Text	Provides additional details on the messaging status of a Lead.	Existing
Conversica Conversation Status Date	Date and Time	Date and time the Conversation Status was last updated.	Existing
Conversica Most Recent Response	Multiple Lines of Text	The most recent response from the lead. Previous responses will be replaced with the most recent.	Existing
Conversica Last Response Date	Date and Time	Date and time the Lead last replied to Conversica.	Existing

Conversica Lead Profile	Single Line of Text	A link to the Conversica Lead Profile page for the selected Lead.	Existing
Conversica Discovered Email 1	Single Line of Text	If a new email address is discovered in a Lead's response, this field will be populated with the additional email address.	New
Conversica Discovered Email 2	Single Line of Text	If a second new email address is discovered in a Lead's response, this field will be populated with the additional email address.	New
Conversica Discovered Name	Single Line of Text	If a new first name is discovered in a Lead's response, this field will be populated with the preferred first name.	New
Conversica SMS Opt Out	Two Options	Checked if the Lead indicates they would no longer like to be messaged via SMS after having previously opted in.	New
Conversica First Message Date	Date and Time	Date and time the Lead was sent their first Conversica email.	Existing
Conversica Last Message Date	Date and Time	Date and time the Lead was sent their most recent Conversica email.	Existing
Conversica Date Added	Date and Time	Date the Lead was first added to Conversica.	Existing

Conversation Stage and Conversation Status Definitions

Below is a breakdown of our two fields that outline where the lead is in messaging. These fields will help you understand if we are messaging the lead, or why we are not – for example if we completed our conversation with the lead or if the lead was excluded and not messaged.

Conversation Stage	Conversation Status	Definition
Preparing Lead	• Preparing Lead	Lead has been received by Conversica and has not been scheduled for first message
	• First Message Scheduled	Lead has its first message scheduled, but not sent

Messaging	• Sent Message	Lead has been sent at least one message and no response to the current series has been received
	• Out of Office	Received out of office message. Lead will remain in this status until the next message is sent (based on date extracted).
	• Checking Back Later	Received message asking to check back later. Lead will remain in this status until follow-up check back later message is sent
	• Received Response	System is reviewing response.
	• Message Scheduled	Next message is scheduled but not yet sent. Typically due to worktimes. Status changes to Sent Message on sending
Excluded (Client requested lead not be worked)	• Excluded (Lead Source)	Client requested specific lead source not be worked
	• Excluded (Rep)	Client requested specific rep's leads not be worked
	• Excluded (Lead Status)	Client requested specific lead status not be worked
	• Excluded (Rule)	Other reasons for exclusion, typically client rule
Unworkable	• No Rep Assignment	System is missing rep and no primary rep is set
	• Duplicate (Internal)	Lead is a duplicate of earlier lead from client
	• Duplicate (CRM)	Client CRM marked lead as duplicate
	• Duplicate (External)	Lead is a duplicate of earlier lead from another client
	• Invalid Email	Lead is invalidated by email verification system
	• Malformed Email	Lead does not have correct email address format
	• No Email	Lead does not have an email address

	<ul style="list-style-type: none"> Bounced 	Message could not be delivered to mailbox due to three soft bounces (e.g., mailbox is full) or one hard bounce (e.g., domain does not exist)
Lead Stopped	<ul style="list-style-type: none"> Unsubscribed 	Lead clicked unsubscribe link in message
	<ul style="list-style-type: none"> Marked Spam 	Lead marked message as Spam
	<ul style="list-style-type: none"> Do Not Email 	Lead was marked as Do Not Email by Conversica system
	<ul style="list-style-type: none"> Lead Requested Stop 	Conversica system interprets that lead wants messaging to stop for whatever reason
Client Stopped	<ul style="list-style-type: none"> Manager Stopped 	Rep's Manager stopped messaging
	<ul style="list-style-type: none"> Rep Stopped 	Rep stopped messaging
	<ul style="list-style-type: none"> Admin Stopped 	Client Admin stopped messaging
	<ul style="list-style-type: none"> Inactive Service 	Lead deactivated due to an inactive (terminated) Service
	<ul style="list-style-type: none"> CRM Stopped 	Client's CRM stopped messaging through the Conversica Options field.
	<ul style="list-style-type: none"> Client Requested Stop 	Conversica Customer Success stopped messaging (on request from Client)
Conversica Stopped	<ul style="list-style-type: none"> Listening 	Leads that do not respond within seven days after last message in Series. Lead could move to Messaging / Response Received if a response is received
	<ul style="list-style-type: none"> Pause Limit Exceeded 	Paused leads that have passed the limit for being worked
	<ul style="list-style-type: none"> Marked Sold 	Lead marked as having already purchased
	<ul style="list-style-type: none"> Conversation Complete 	Conversation with lead is complete. System is not expecting any further responses
	<ul style="list-style-type: none"> System Stopped 	Response is such that system cannot continue messaging, but lead did not request stop. Closely related to Review Response (formerly Action Required), but separate status
	<ul style="list-style-type: none"> Service Not Active 	Service for lead is not active. Lead has not been messaged

Conversica Lead Status Definitions (New)

The Lead Status field will tell you the current state of the Lead, such as if they are ready to contact or if they need to be followed up with.

Value	Description
Hot Lead	Lead has expressed interest and is ready for contact. Use this field to run reports to see what Leads are currently Hot and ready for contact. A Lead will remain Hot until we follow-up and hear if they have any additional questions.
Review Response	Lead's reply needs to be reviewed to determine your rep's next action. Conversica will no longer message this Lead. Lead to Review could include Leads that have notified you of a better contact or that have asked a question the AI does not continue on.
Further Action	Lead responded that they have further questions or that they are waiting on actions from their assigned contact.
Satisfied (New)	Lead responded positively, indicating completion of the Conversation's objective.
Disqualified	Lead responded to the follow-up message, indicating they do not need help and have not met the Conversation's objective.
No Further Action	Lead responded positively to the follow-up message, indicating they no longer require assistance. Unclear if the Conversation's objective was met.

Conversica Lead Status Definitions (Old)

The following values are to be replaced with the new ones listed above. Existing values for previous leads will not be changed as a result of this transition.

Value	Description
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Hot Lead	Lead has expressed interest and is ready for contact. Use this field to run reports to see what Leads are currently Hot and ready for contact. A Lead will remain Hot until we follow-up and hear if they have any additional questions.
Review Response	Lead's reply needs to be reviewed to determine your rep's next action. Conversica will no longer message this Lead. Review Response could include Leads that have notified you of a better contact or that have asked a question the AI does not continue on.
Lead at Risk	Lead has indicated they were not contacted after turning hot, and/or has additional questions they would like answered.
Satisfied	Lead has indicated they were contacted and have no open questions.