Manually assign a lead source to a contact

This article applies to:

Lead source s are automatically created and assigned when a contact fills out a form online or makes a purchase. However, you will need to manually assign a lead source to contacts you add to Max Classic manually. A lead source is defined as the first point of contact. This can be tracked when the first point of contact is online. If a contact's first point of contact is in person or by phone, you may need to ask the contact how they first learned about your business.

The ability to update a contact's lead source or mass update a list of people is controlled through user permissions.

Open the contact record and on the left side the page, select a lead source from the drop-down and click on the **Save** button at the bottom of the page.