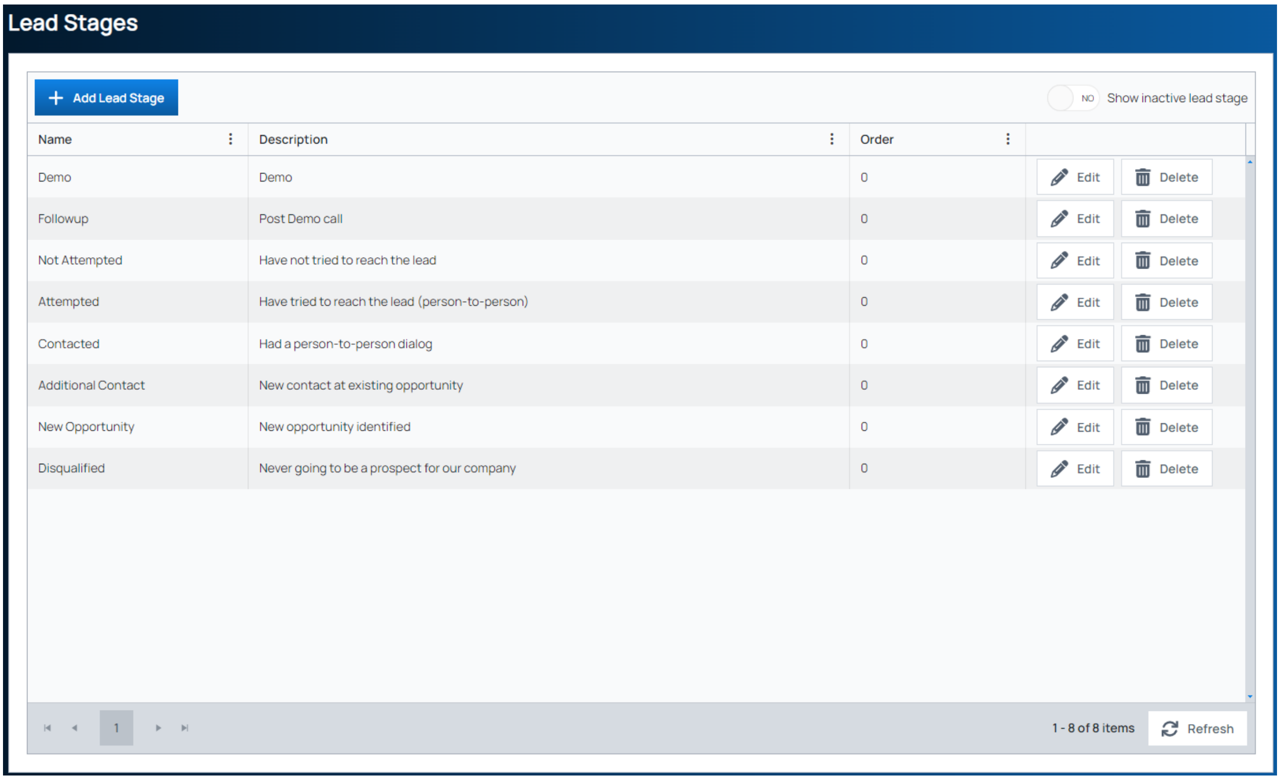
Lead Stages

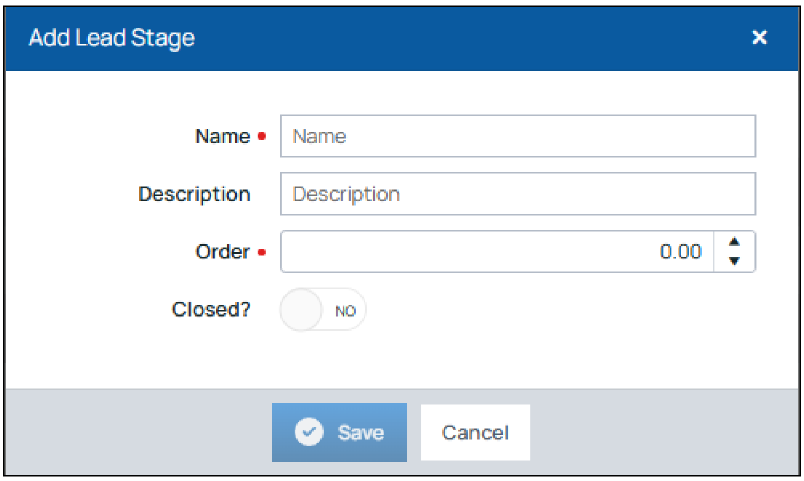
Last Modified on 01/23/2025 8:12 pm EST

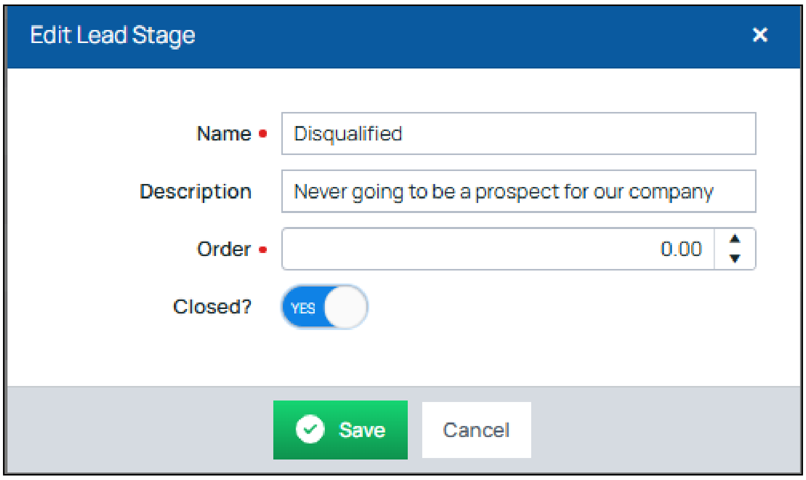
In the Setup menu, we added a menu and page for Lead Stages (Setup > Lead Setup > Lead Stages). Use this to define the stages in your company's sales workflow or pipeline that your leads can move through. These stages will be manually updated by the assigned salesperson as the leads move through the sales workflow and can be used to filter or sort through your leads.



In the grid, columns show the lead stage name, description, and assigned order. There is an Edit button and Delete button in each row to change or delete the lead stage.

To add a lead stage, click the **Add Lead Stage** button. The Add Lead Stage popup opens.





Type a **Name** for the lead stage. (Required)

Type a **Description** for the lead stage.

Choose an **Order** for the lead stage. (Required)

Closed?: This is for marking a lead as closed. You can create a lead stage with this switch set to YES to indicate that a lead with this stage is closed (or cancelled or disqualified).

Click **Save** when finished.