Create Sales Pipeline Stages

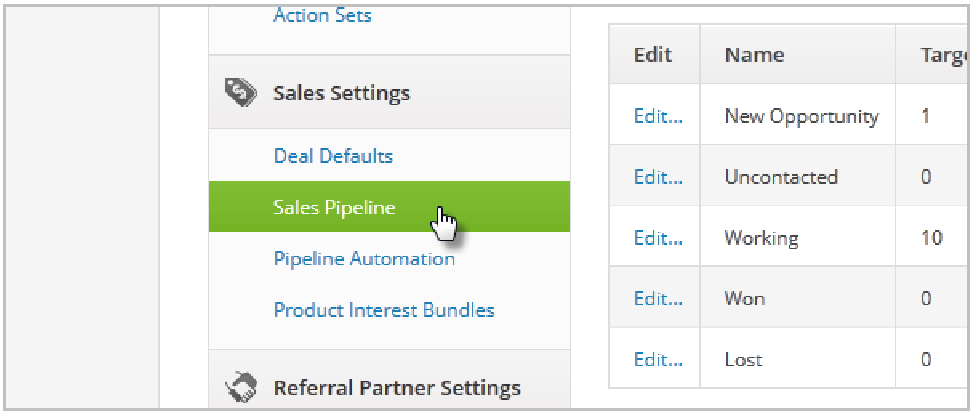
This article applies to:

Max Classic has predefined sales pipeline stages, based on a typical direct sales process. You can customize these stages to align with your direct sales process. Each stage can be integrated into a sales and marketing campaign.

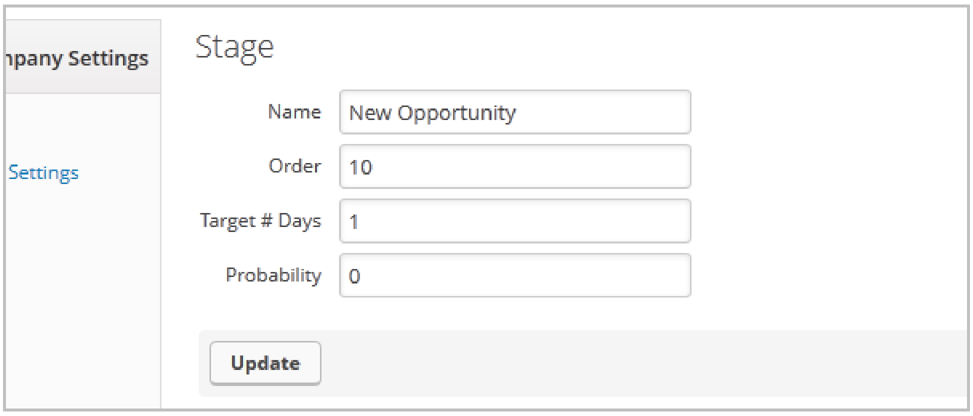
Sales reps will move the sales stage manually as a prospect progresses through the sales process. When a rep moves the stage, the sales campaign will automatically update tags and/or follow-up messages. Sales managers will use the stages to track sales rep effectiveness and evaluate overall sales team performance. Tap into your top sales team members to define and standardize your sales stages and identify what type of automation makes sense during each stage.

1. Go to **CRM > Settings** in the main navigation menu.

2. Click on **Sales Pipeline** in the *Settings* menu.

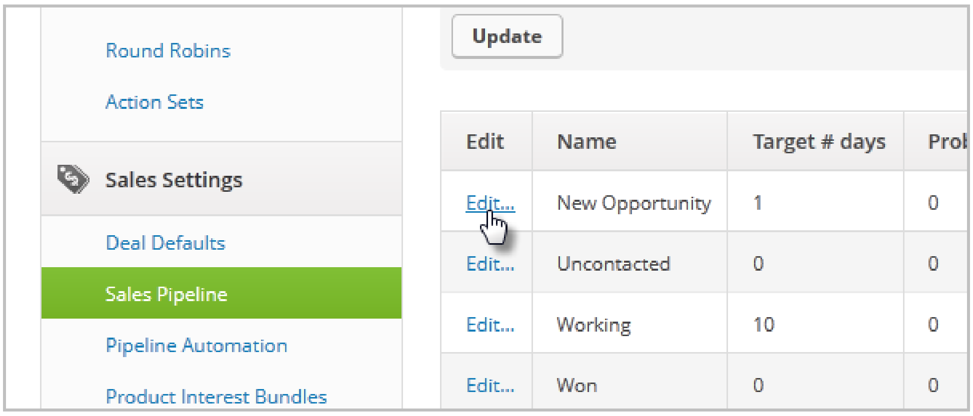


3. Review the list of default stages.

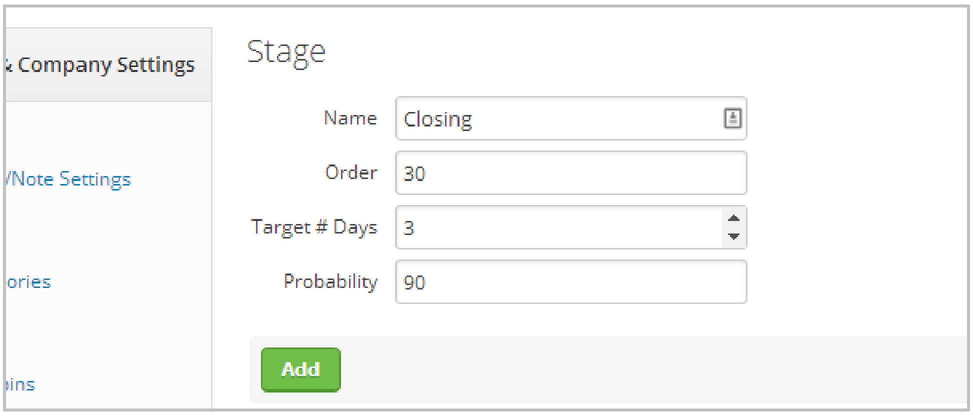


- **Name**: This is what your sales team will see in the opportunity record.
- **Target # Days**: This number represents the max number of days you typically want a prospect to remain in the stage. It shows up in the opportunity record and can be used as search criteria when searching opportunity records.
- **Probability**: The probability is a percentage that reflects the number of deals that turn into sales when a prospect reaches this stage. If 4 out of every 5 prospects purchase once they reach a certain stage, then the probability of making the sale for that stage is 80%. The probability is used to calculate the weighted revenue in the opportunity revenue forecast sales report. This is a very important field if your goal is forecasting.
- **Order**: This number is used to set up the order for the stages in the opportunity record drop-down. Increment by multiples of 10 at first, so that you can insert new stages between the existing stages. The stages with a lower order number show up higher on the list.

4. Click on **Edit** next to a stage name to customize it.



5. After you finish updating the default stages, start adding new stages by entering a name, order number, target # days and probability. You can insert a sales stage between other stages by assigning it an order number between the existing stages' order numbers.



6. Click the **Add** button to add the new stage.