

Campaign Sequence - Move opportunity 🔗

This article applies to:

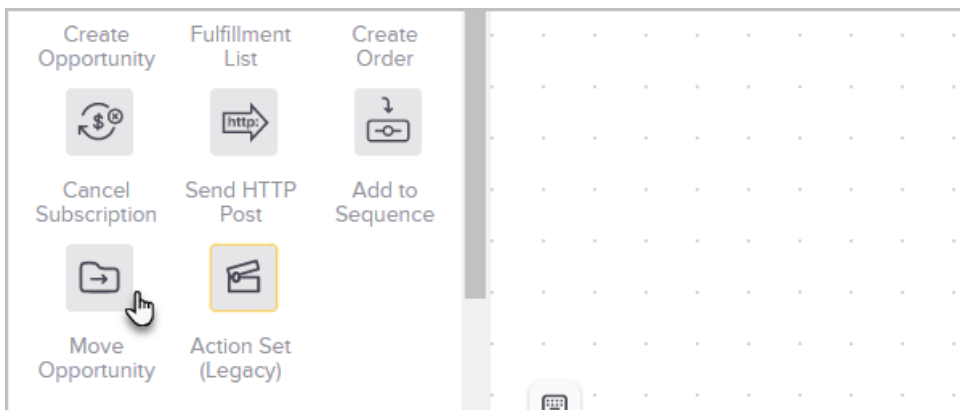
[Max Classic](#)

Automate your business with the “Move opportunity” process in the Campaign Builder. Using this process means you no longer need to manually move your opportunities from stage to stage, so you can spend more time closing deals instead of maintaining them.

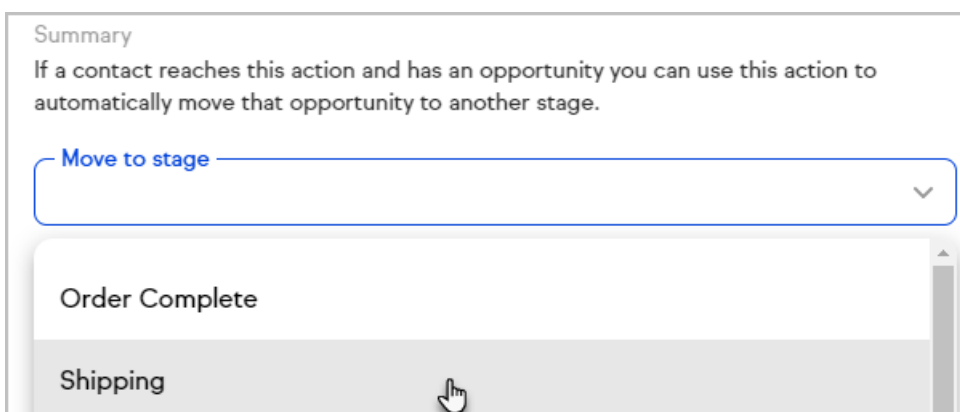
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Automatically move opportunity stages

1. Enter a campaign sequence
2. Drag the **Move opportunity** process onto the canvas



3. Double click the process to configure it
4. Select the stage that opportunities in this automation should be moved to



5. Choose which opportunities should be moved by this automation

If one contact has multiple opportunities — Only move the most recently created

Only move the most recently created

Only move the most recently updated

Move all of them

6. Select whether or not opportunities in Won and Lost states should be moved by this automation

Move to stage

If one contact has multiple opportunities — Only move the most recently created

Don't move opportunities that are in Won or Lost

7. Click Save

Move Opportunity Save

Summary

If a contact reaches this action and has an opportunity you can use this action to automatically move that opportunity to another stage.

Move to stage — Shipping

If one contact has multiple opportunities

Warning

Opportunities will not be moved into a Won or Lost pipeline stage if that stage requires a Won or Lost reason to be selected.

Opportunities will not be moved out of stages with required checklist items unless the items are checked before the campaign action items trigger.

FAQs

What if a contact has more than one opportunity?

You can choose from the options of moving All, Most recently updated, Most recently created opportunities.

What does the check box of "Don't move opportunities that are in won/lost" mean?

If the contact has any opportunities that are currently in a stage that you have set as a Won or Lost state (CRM>Settings>Opportunity Defaults), those opportunities will not be moved by your automation. This option is selected by default but can be disabled.
