How to assign Stages to a Lead?

Stages help organize leads based on their current position in the sales process, making it easier to track progress and manage lead pipelines within AgentRoof CRM.

Method 1: Assign Stages from the Leads Listing Page

Steps

1. Navigate to the CRM page.
2. Select the checkbox next to the lead you want to assign a stage to.
3. Click the **Assign Stage** icon located in the Leads row.
4. A pop-up window will appear displaying all available stages.
5. Select the stage you want to assign to the lead.
6. Click **Apply** or confirm the selection.

Method 2: Assign Stages from the Lead Profile Page

Steps

1. Select the desired lead.
2. Click the **Profile** button to open the lead profile page.
3. Locate the **Stage** section and click the current stage name.
4. Select the stage you want to assign to the lead.
5. The selected stage will be updated successfully.

> **Note:**
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> - A lead can only have one stage at a time. To change a lead's stage, click the current stage name and select a new stage.
> - When a lead is assigned to a stage, any active items associated with that stage—such as Action Plans, Listing Alerts, Price Drop Alerts, Market Updates, Newsletters, or other stage-based automations—may also be applied to the lead, depending on the stage configuration.

Result

The selected lead will be assigned to the chosen stage and may automatically inherit any workflows, alerts, communications, or automations associated with that stage.

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