

Managing Stages in AgentRoof CRM

What Are Stages?

Stages help organize leads based on their current position in the sales process. Examples of stages include **Lead**, **Active Buyer**, **Active Seller**, and other custom stages that match your workflow.

“ **Note:** A lead can be assigned to only one stage at a time, while a single stage can contain multiple leads.

Why Are Stages Important?

Stages provide a structured way to track lead progress and manage your sales pipeline. By using stages, you can:

- Monitor where leads are in the sales process.
- Organize leads based on their current status.
- Filter and manage leads more efficiently.
- Apply stage-specific automations and communications.
- Gain better visibility into your pipeline.

“ **Note:** System default stages created by AgentRoof cannot be edited or deleted.

Viewing Leads by Stage

1. Navigate to **Settings**, and then select **Stages**.
2. All available stages will be displayed on the Stages page.
3. If needed, use the **Search Stage** field to quickly find a specific stage.
4. Click the number displayed in the **Leads** column.

The list of leads assigned to the selected stage will be displayed.

Creating a New Stage

1. Navigate to **Settings > Stages**.
2. Click the + icon or **Add New** button.
3. Enter the stage name.

4. Click **Add Stage**.

The new stage will be created successfully.

Merging Stages

“ Notes:

- When a custom stage is merged, the custom stage is deleted after its leads are moved to the selected stage. AgentRoof default stages cannot be deleted and will remain available after the merge.
- A minimum of 2 and a maximum of 10 stages can be merged at a time.

Steps

1. Select the checkboxes next to the stages you want to merge.
2. Click **Merge Stages** from the top menu.
3. In the pop-up window, select the **Main Stage**.
4. Review the merging details.
5. Click **Merge Stages** to complete the process.

The selected stages will be merged successfully, and all associated leads and optional stage-related assignments will be consolidated under the Main Stage.

What Happens During a Stage Merge?

When stages are merged:

- The selected stages are removed from all associated leads.
- The Main Stage is assigned to all leads belonging to the selected stages if it is not already assigned.
- The selected stages are removed after the merge is completed.

Moving Associated Items

You can optionally move the following items from the selected stages to the Main Stage:

- Action Plans
- Listing Alerts
- Newsletters
- Market Updates

When this option is selected:

- Action Plans, Listing Alerts, Newsletters, and Market Updates from the selected stages will be assigned to leads under the Main Stage if they are not already assigned.

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