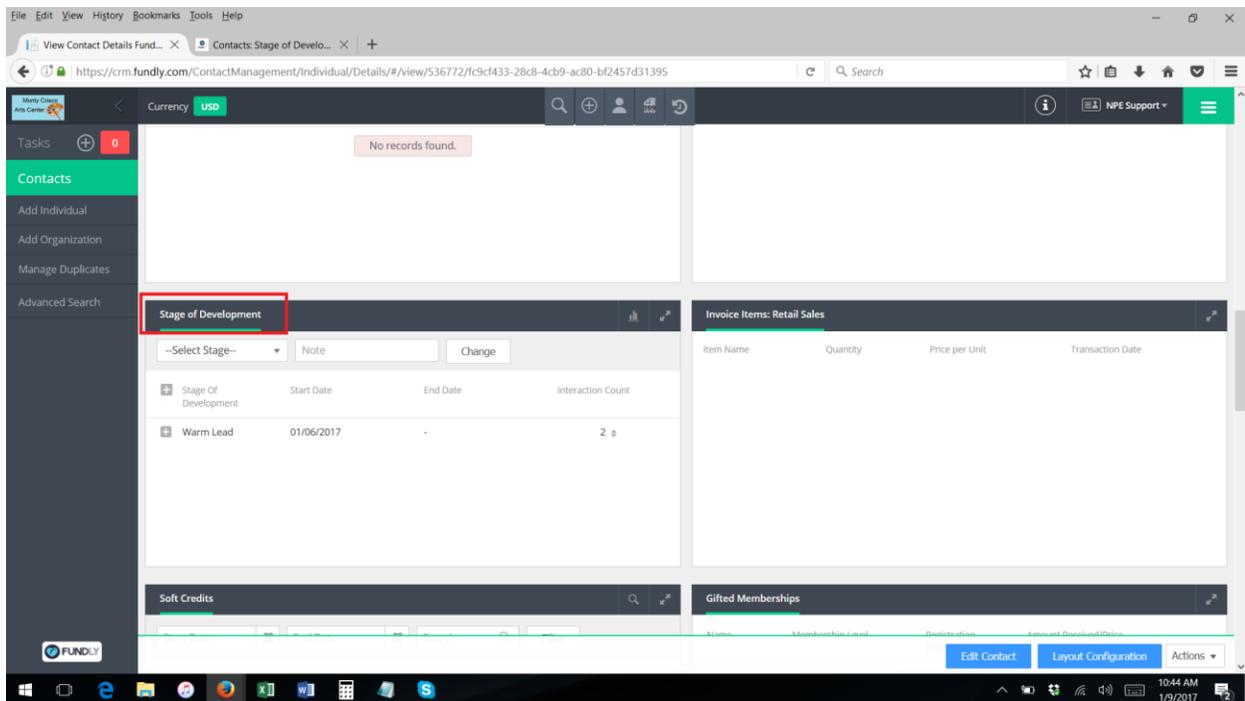


## Contacts: Stage of Development Part II – Add/Edit Contact Stage of Development

1. The Stage of Development module allows users to track a contact's flow through a lead development pipeline. For example, this module could be used to track the development of donors from a prospect through various relationship stages to donor, or a potential client from a lead to a closed deal/sale.
2. Before the stage of development can be added to a contact record, they stages must first be configured on the Configurations menu (see the "[Stage of Development Part I – Configure Stage of Development](#)" tutorial).
3. To add a stage of development to a contact's record, **view the contact record**.
4. Scroll down to the Stage of Development module (you may have to first turn this module on under the contact layout configuration [blue button in the lower right hand corner of the view contact screen]).

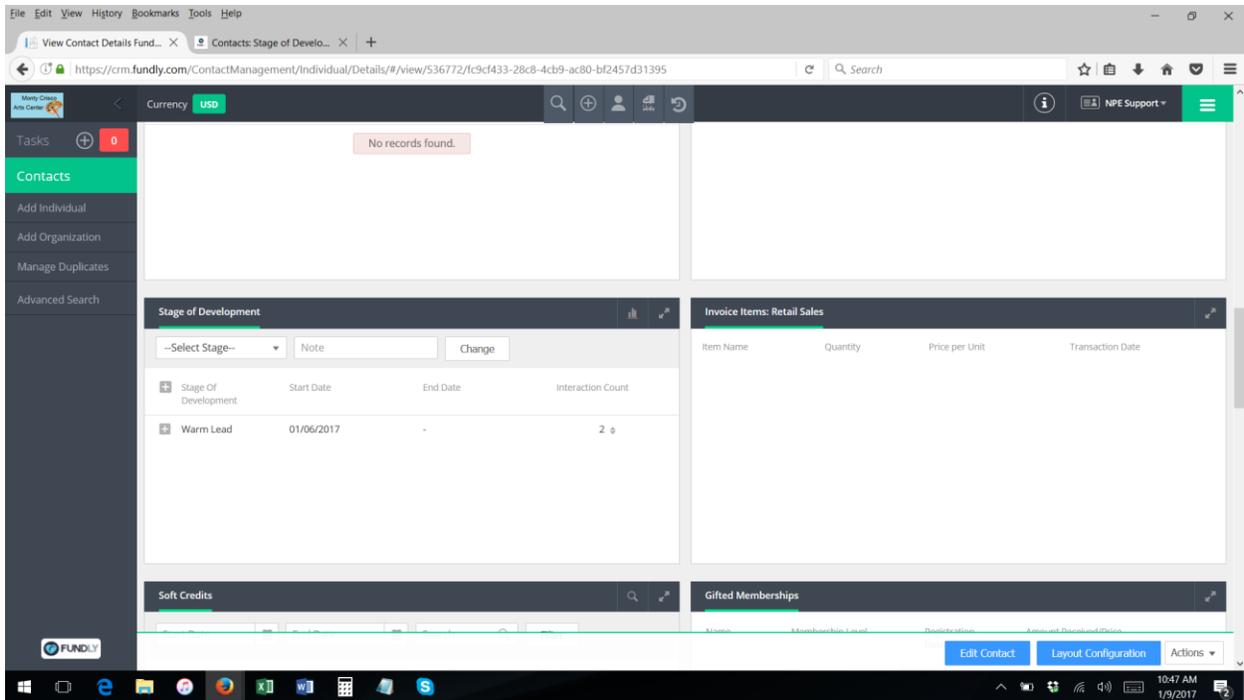


The screenshot displays the Fundly CRM interface for a contact record. The browser address bar shows the URL: <https://crm.fundly.com/ContactManagement/Individual/Details/#/view/536772/fc9c433-28c8-4cb9-ac80-bf2457d31395>. The interface includes a left sidebar with navigation options: Tasks, Contacts, Add Individual, Add Organization, Manage Duplicates, and Advanced Search. The main content area is divided into several modules. The 'Stage of Development' module is highlighted with a red box and contains a table with the following data:

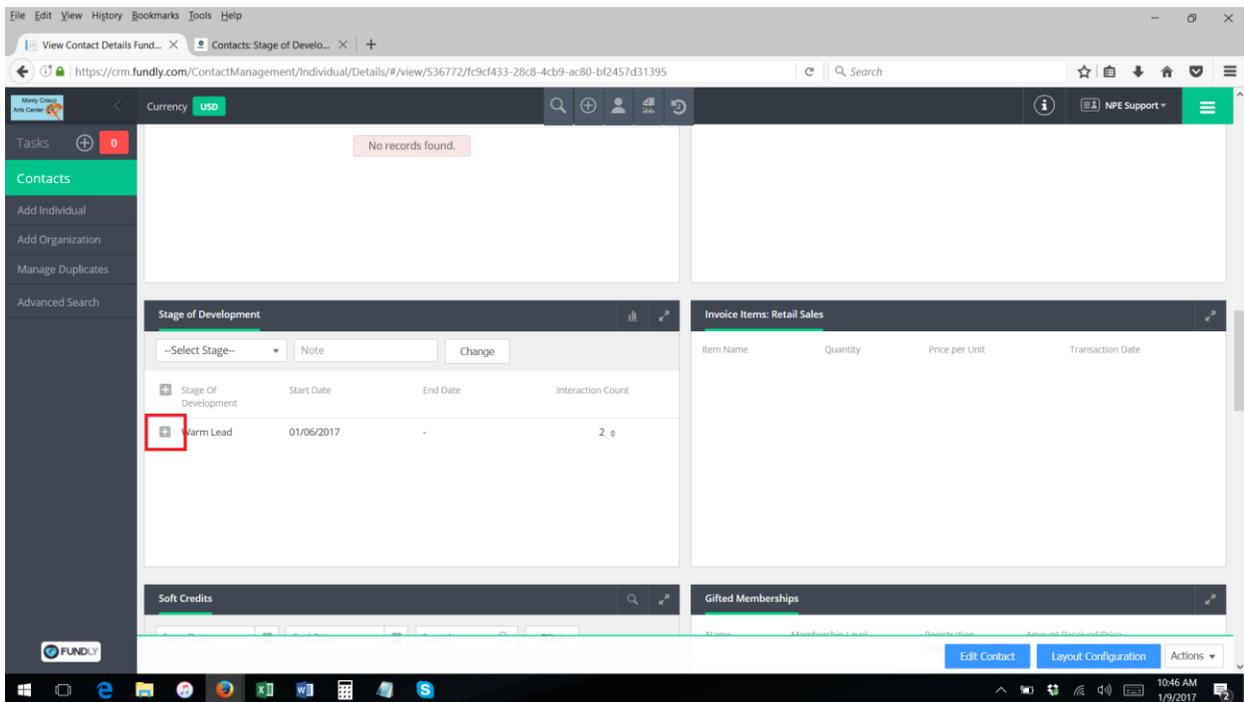
Stage Of Development	Start Date	End Date	Interaction Count
Warm Lead	01/06/2017	-	2

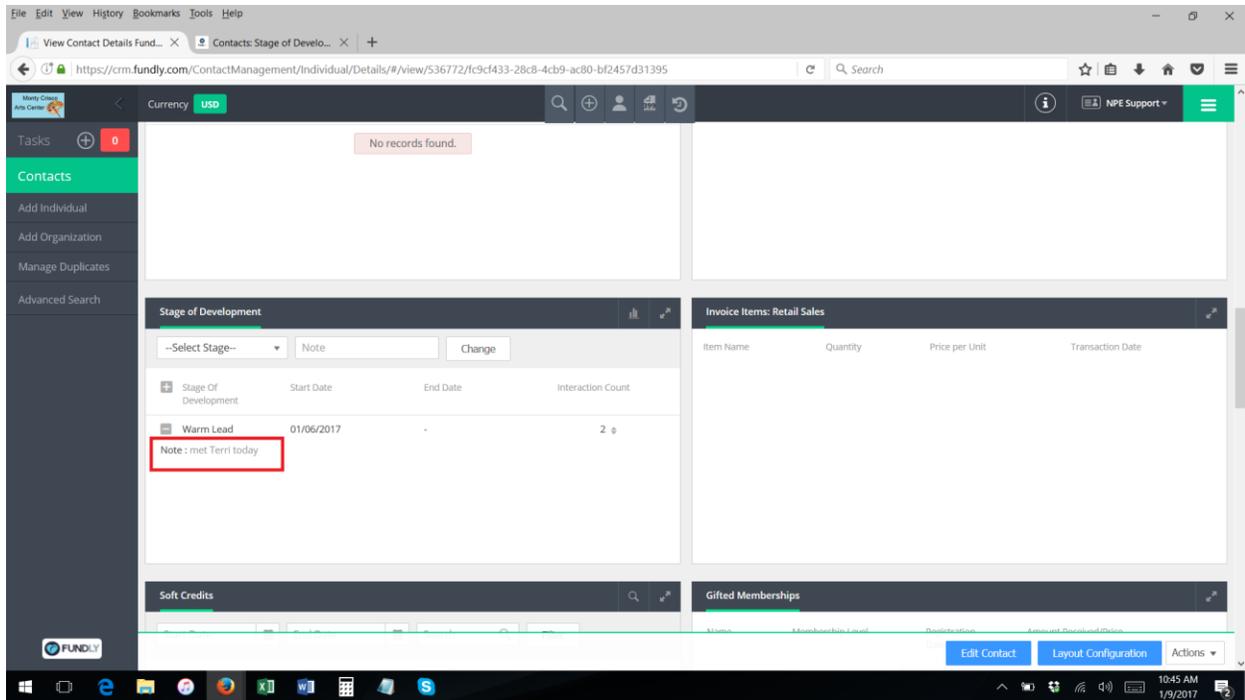
Other visible modules include 'Invoice Items: Retail Sales' with columns for Item Name, Quantity, Price per Unit, and Transaction Date; 'Soft Credits'; and 'Gifted Memberships'. At the bottom right, there are buttons for 'Edit Contact', 'Layout Configuration', and 'Actions'. The Windows taskbar at the bottom shows the time as 10:44 AM on 1/9/2017.

5. On the Stage of Development module, you will see any stages that have previously been added to the contact's record and you will see a count of interactions that occurred with the contact while the contact was in each stage of development.

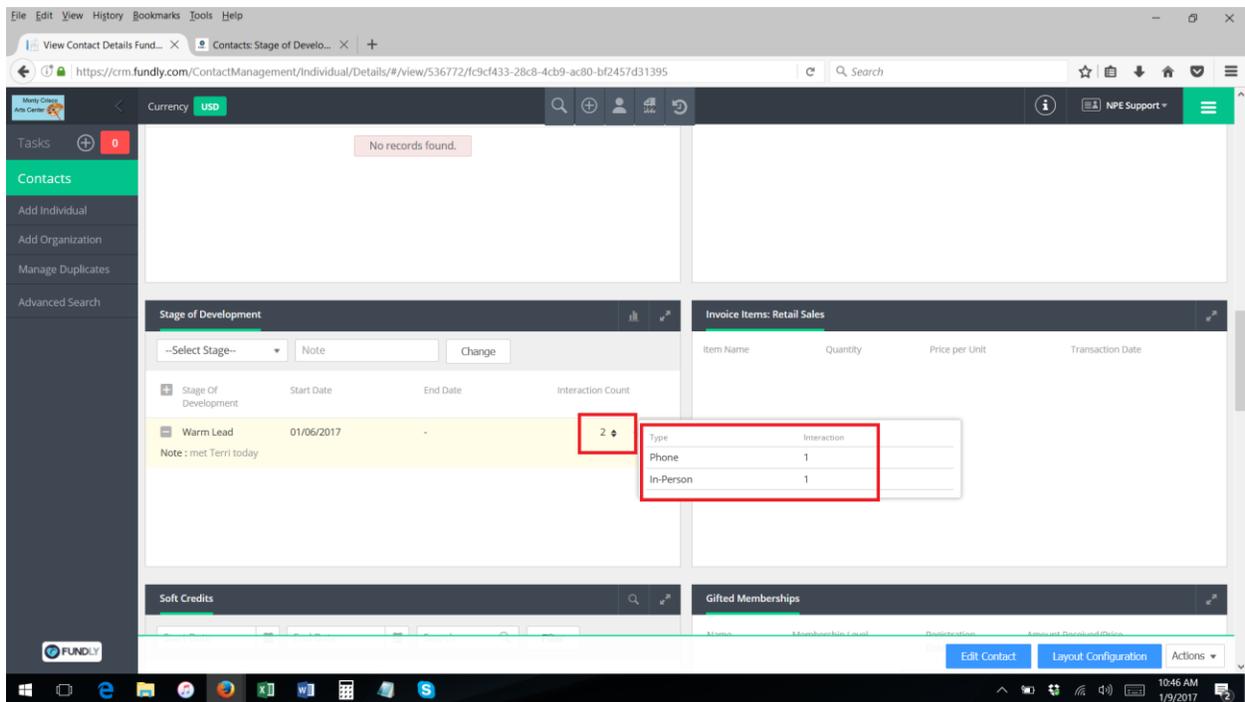


6. Clicking the “+” next to any recorded stage will display notes that were entered when that stage of development was added to the contact’s record.

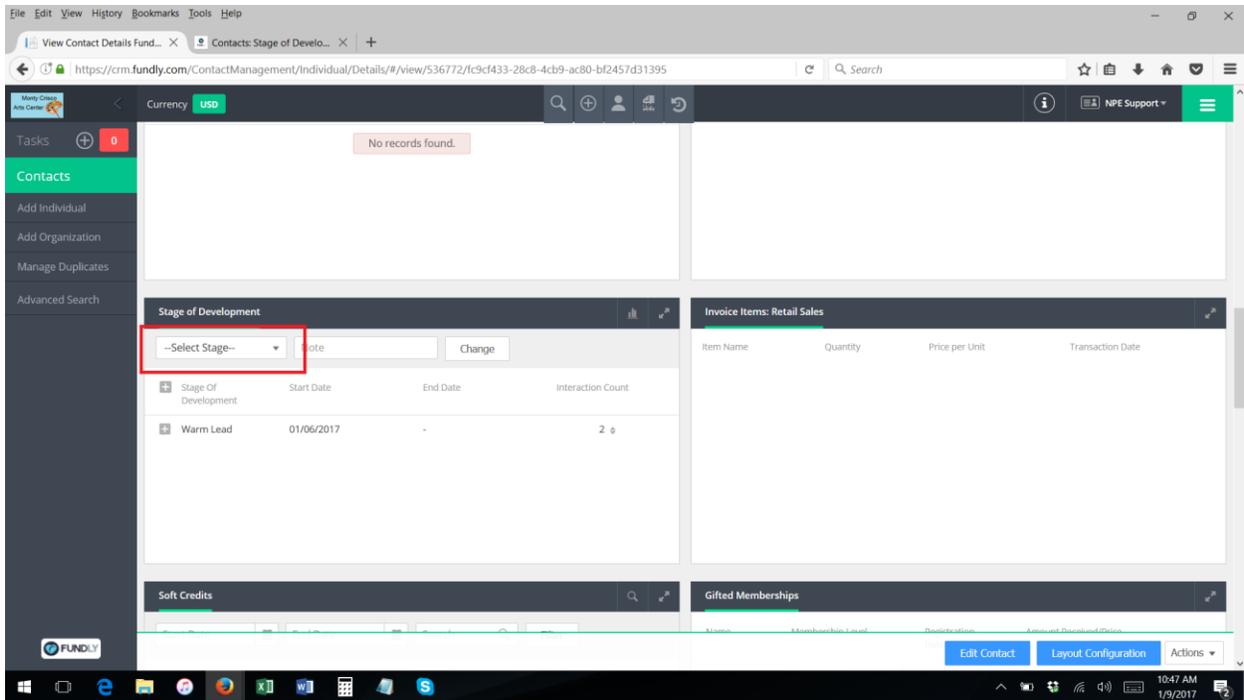




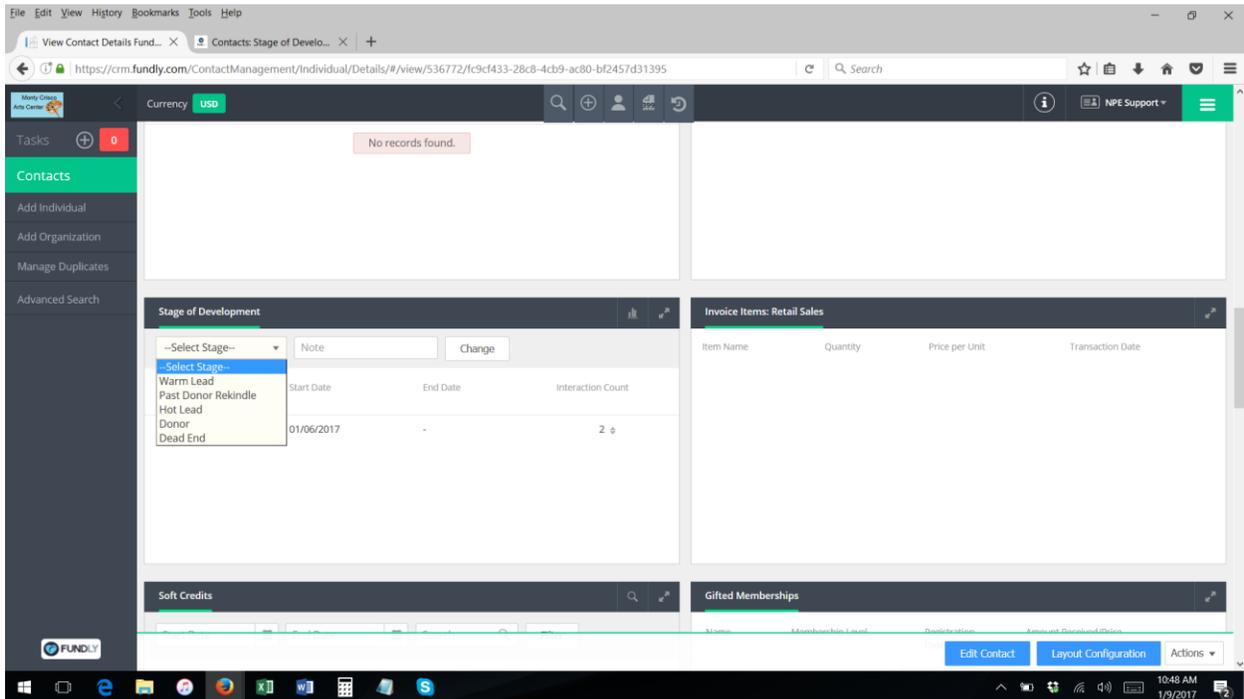
7. Hovering over the Interaction Count for any stage will reveal the details of the interactions that have taken place while that contact was at that stage of development.



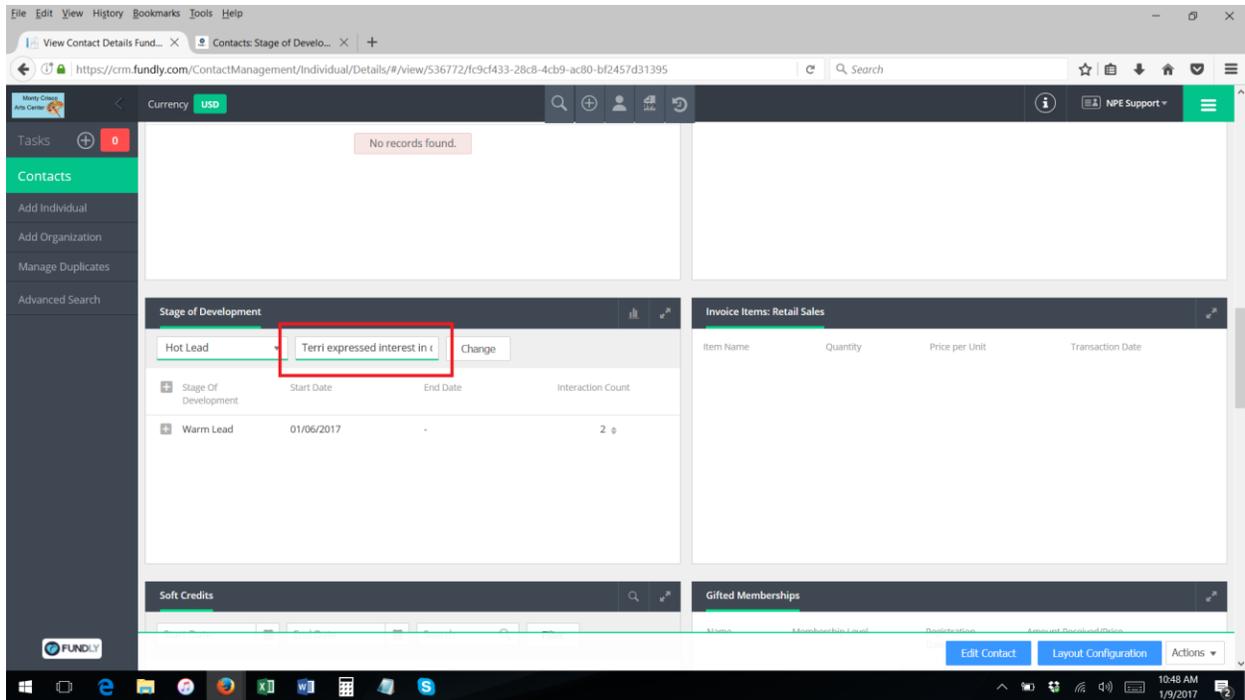
8. To add a new stage of development to the contact's record, click on the "Select Stage" drop down menu.



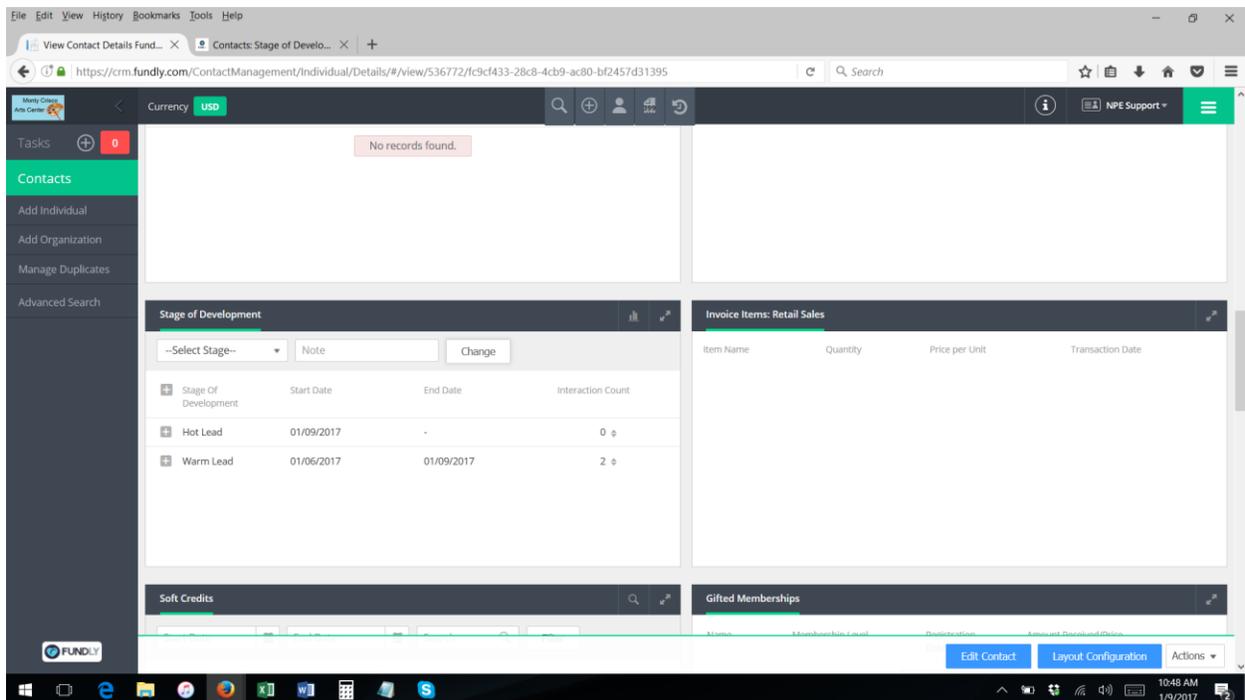
9. Select the desired stage.



10. Add a note (required), such as why the contact is being marked as being at this stage, the staff person making the change, etc.



11. Click “change.” The stage of development is now recorded on the contact’s record (it may take a second or two for the contact page to refresh and show the stage of development).



12. The system will automatically enter an end date for the previous stage as the date you change the contact to a new stage. **You cannot back date stage of development changes; the system**

will automatically assign the date you add a new stage as the end date for the previous stage and the start date of the current stage.

The screenshot displays the Fundly CRM interface for a contact's 'Stage of Development'. The table below shows the progression of stages:

Stage Of Development	Start Date	End Date	Interaction Count
Hot Lead	01/09/2017	-	0
Warm Lead	01/06/2017	01/09/2017	2

13. The system will now keep track of the number of interactions recorded (in the tasks & interactions module) with this contact, while the contact is at this stage of development. This count will show in the Interaction Count column. This allows user to keep track of how much effort (how many interactions) it took to move the contact to the next stage of development.

The screenshot shows the Fundly CRM interface for a contact's details. The 'Stage of Development' table is visible, with the 'Interaction Count' column highlighted by a red box. The table contains the following data:

Stage Of Development	Start Date	End Date	Interaction Count
Hot Lead	01/09/2017	-	0
Warm Lead	01/06/2017	01/09/2017	2

14. To change/update the contact's stage of development, simply repeat steps #9 & #10 above.

15. You can set a contact back to an earlier stage of development by selecting that stage from the list, adding a note, and clicking "change."

The screenshot shows the Fundly CRM interface for a contact's details. The 'Stage of Development' dropdown menu is now set to 'Warm Lead'. The table below it shows the same data as the previous screenshot:

Stage Of Development	Start Date	End Date	Interaction Count
Hot Lead	01/09/2017	-	0
Warm Lead	01/06/2017	01/09/2017	2

View Contact Details Fund... x Contacts: Stage of Develo... x +

https://crm.fundly.com/ContactManagement/Individual/Details/#/view/536772/fc3cf433-28c8-4cb9-ac80-bf2457d31395

Currency USD

Tasks 0

Contacts

Add Individual

Add Organization

Manage Duplicates

Advanced Search

Stage of Development

Warm Lead Terri can't donate right now Change

Stage Of Development	Start Date	End Date	Interaction Count
Hot Lead	01/09/2017	-	0
Warm Lead	01/06/2017	01/09/2017	2

Invoice Items: Retail Sales

Item Name	Quantity	Price per Unit	Transaction Date
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Soft Credits

Gifted Memberships

Edit Contact Layout Configuration Actions

10:59 AM 1/9/2017

View Contact Details Fund... x Contacts: Stage of Develo... x +

https://crm.fundly.com/ContactManagement/Individual/Details/#/view/536772/fc3cf433-28c8-4cb9-ac80-bf2457d31395

Currency USD

Tasks 0

Contacts

Add Individual

Add Organization

Manage Duplicates

Advanced Search

Stage of Development

--Select Stage-- Note Change

Stage Of Development	Start Date	End Date	Interaction Count
Warm Lead	01/09/2017	-	0
Hot Lead	01/09/2017	01/09/2017	0
Warm Lead	01/06/2017	01/09/2017	2

Invoice Items: Retail Sales

Item Name	Quantity	Price per Unit	Transaction Date
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Soft Credits

Gifted Memberships

Edit Contact Layout Configuration Actions

11:01 AM 1/9/2017

16. You cannot delete a stage of development; once added, it will be a permanent part of the contact's record.
17. To see a graphical representation of the contact's stage of development history – including the count of interactions at each stage – click on the graph icon. The exact shape of the graph will depend on the number of interactions that took place at each stage of development.

The screenshot shows the Fundly CRM interface. The 'Stage of Development' panel is active, displaying a table with the following data:

Stage Of Development	Start Date	End Date	Interaction Count
Warm Lead	01/09/2017	-	0
Hot Lead	01/09/2017	01/09/2017	0
Warm Lead	01/06/2017	01/09/2017	2

A red box highlights the data view icon (a tree symbol) in the top right corner of the 'Stage of Development' panel.

The screenshot shows the Fundly CRM interface. The 'Stage of Development' panel is active, displaying a funnel chart. The funnel is blue and shows 'Warm Lead (2)' at the top and 'Hot Lead (0)' at the bottom.

18. To switch from the graphical view back to the data view, simply click the data view (tree) icon.

File Edit View History Bookmarks Tools Help

View Contact Details Fund... x Contacts: Stage of Develo... x +

https://crm.fundly.com/ContactManagement/Individual/Details/#/view/536772/fe9cf433-28c8-4cb9-ac80-bf2457d31395

Currency USD

Tasks + 0

Contacts

- Add Individual
- Add Organization
- Manage Duplicates
- Advanced Search

No records found.

Stage of Development

Warm Lead (2)

Hot Lead (0)

Invoice Items: Retail Sales

Item Name	Quantity	Price per Unit	Transaction Date
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Soft Credits

Gifted Memberships

EDIT CONTACT LAYOUT CONFIGURATION ACTIONS

FUNDLY

11:01 AM 1/9/2017