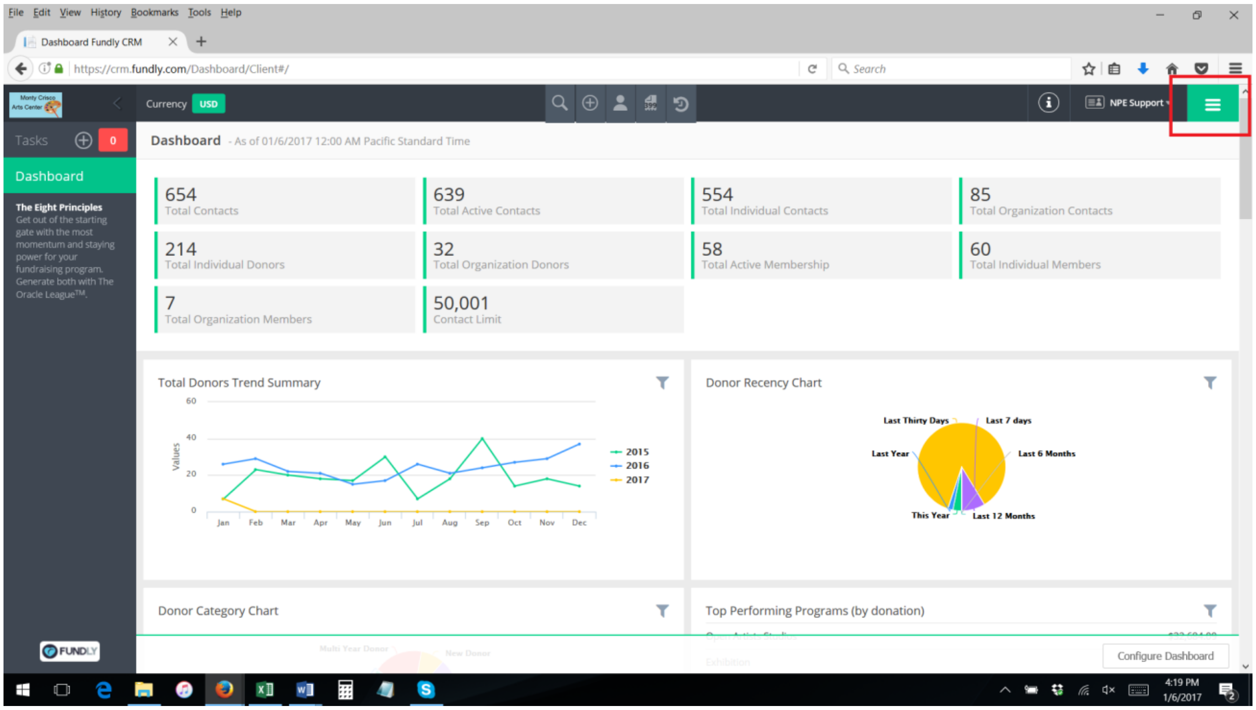
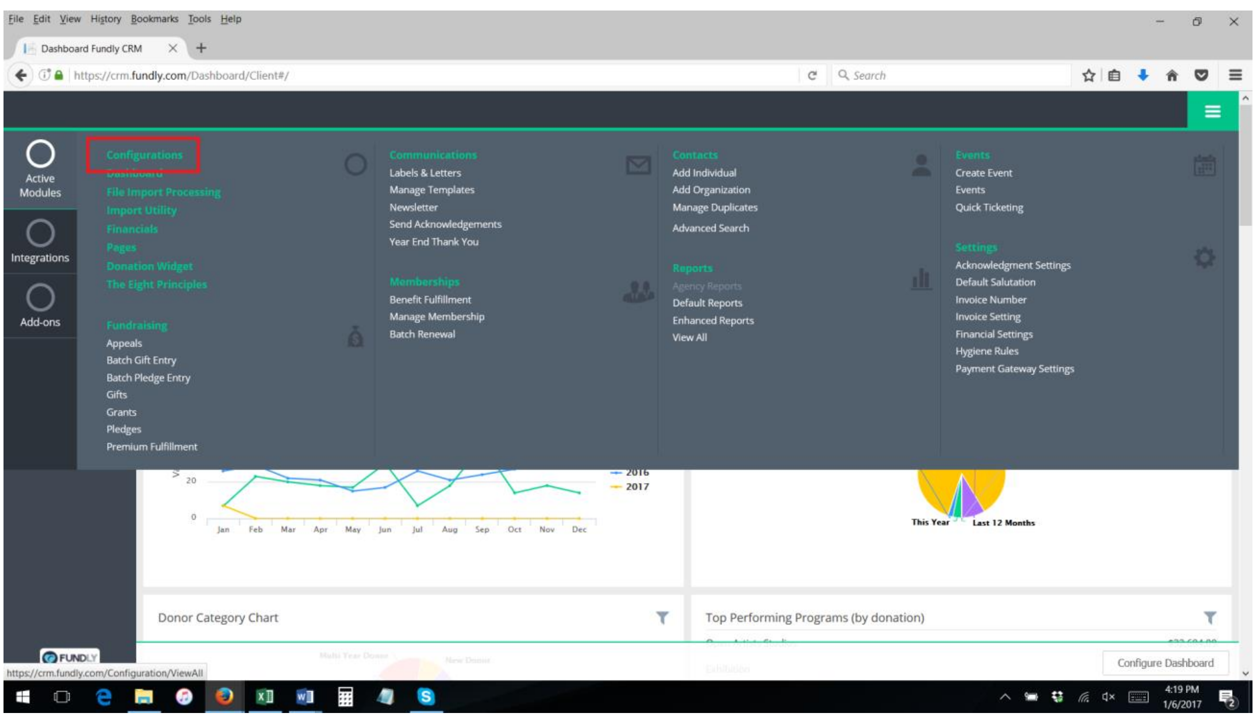
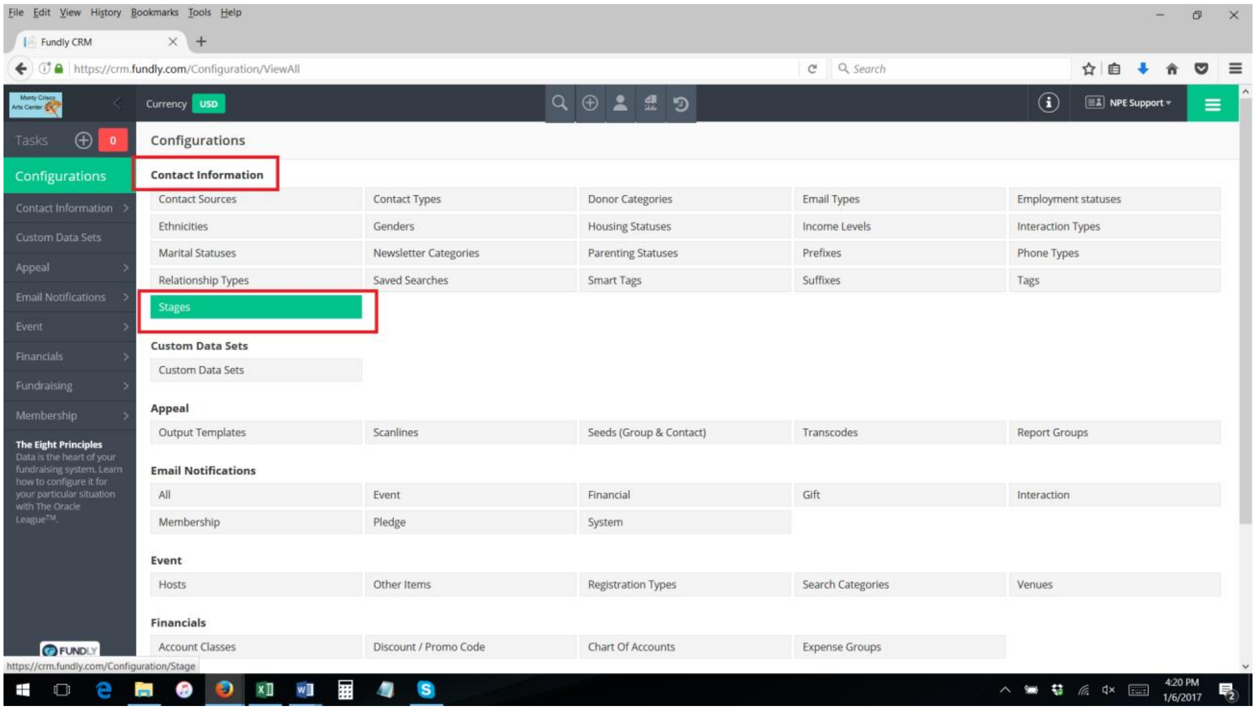
Contacts: Stage of Development Part I - Configure Stages of Development

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 a stage of development can be added to contact records, they must first be added to the Stages of Development drop down menu in **Configurations**.
3. To begin, from the **Main Menu** (3 bars), select **Configurations.**

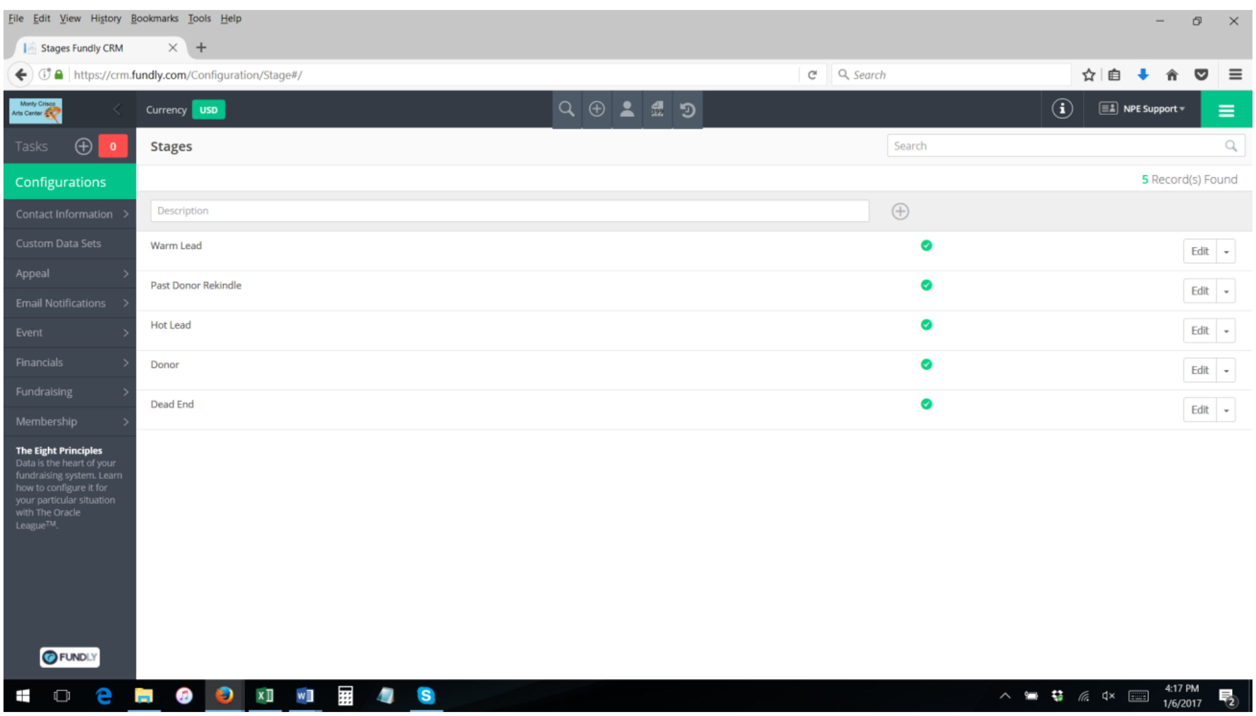




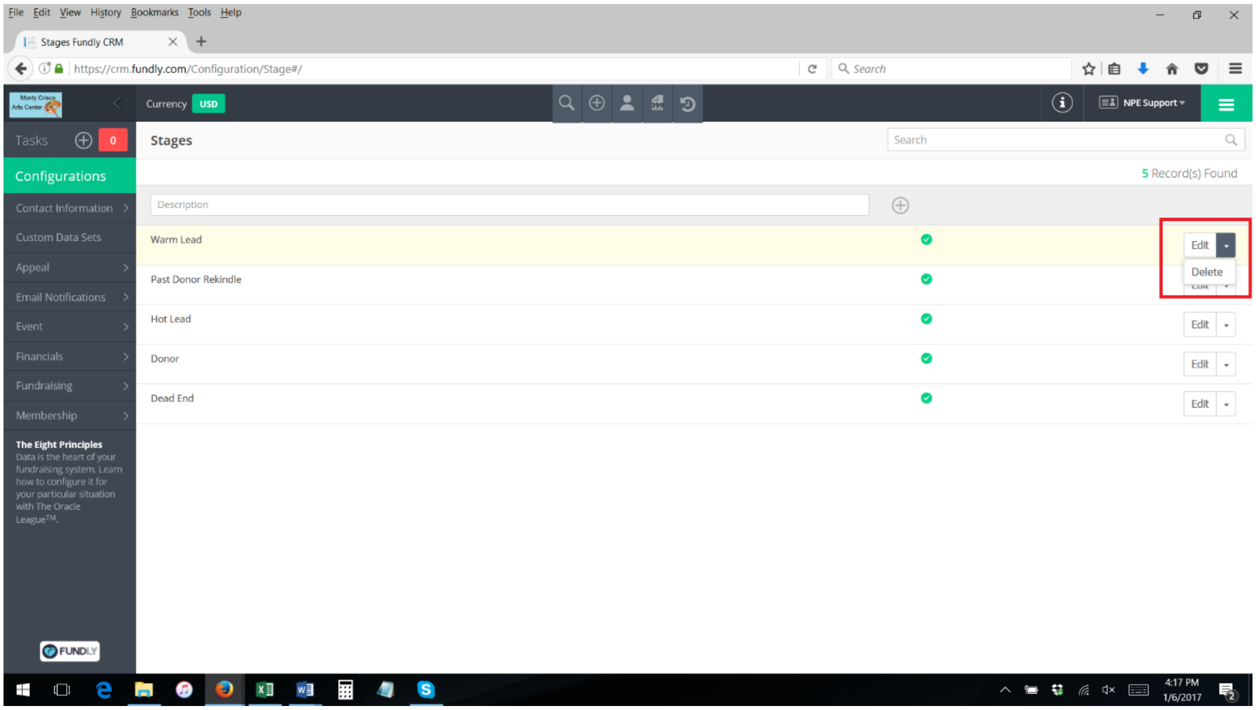
4. Under Contact Information, select “Stages.”



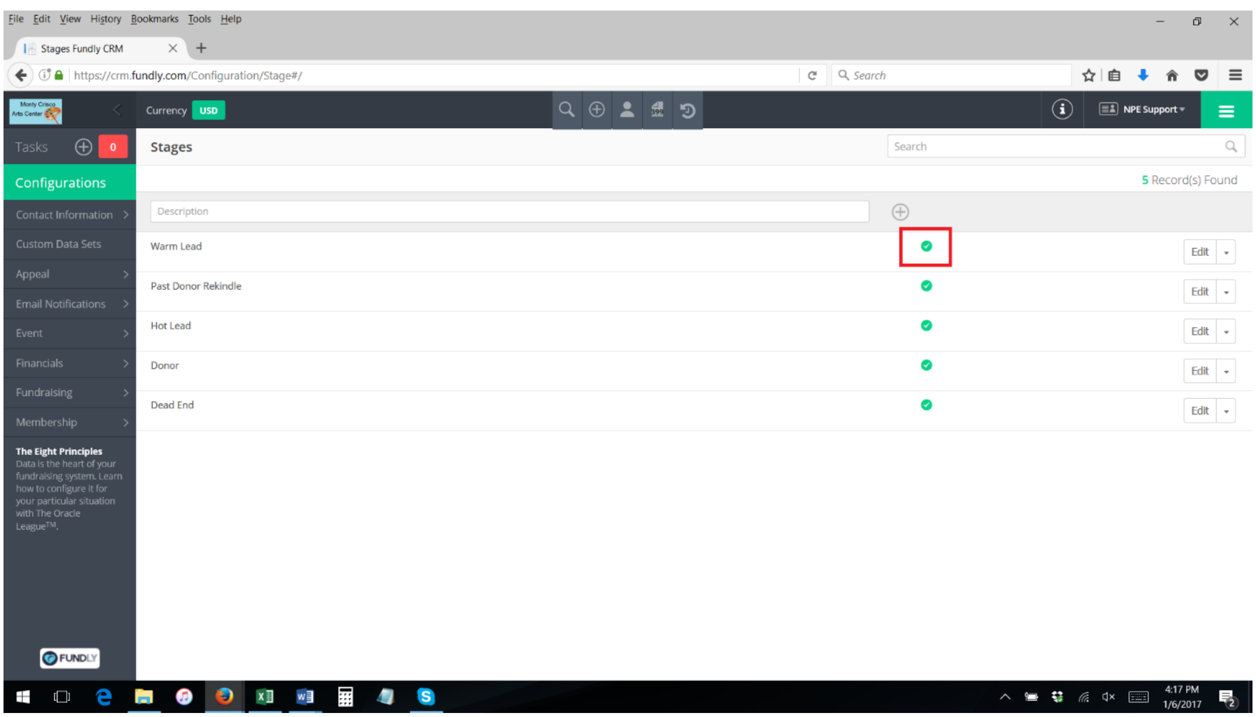
5. On the Stages index screen, you will see a list of the stages of development you have already configured/added.



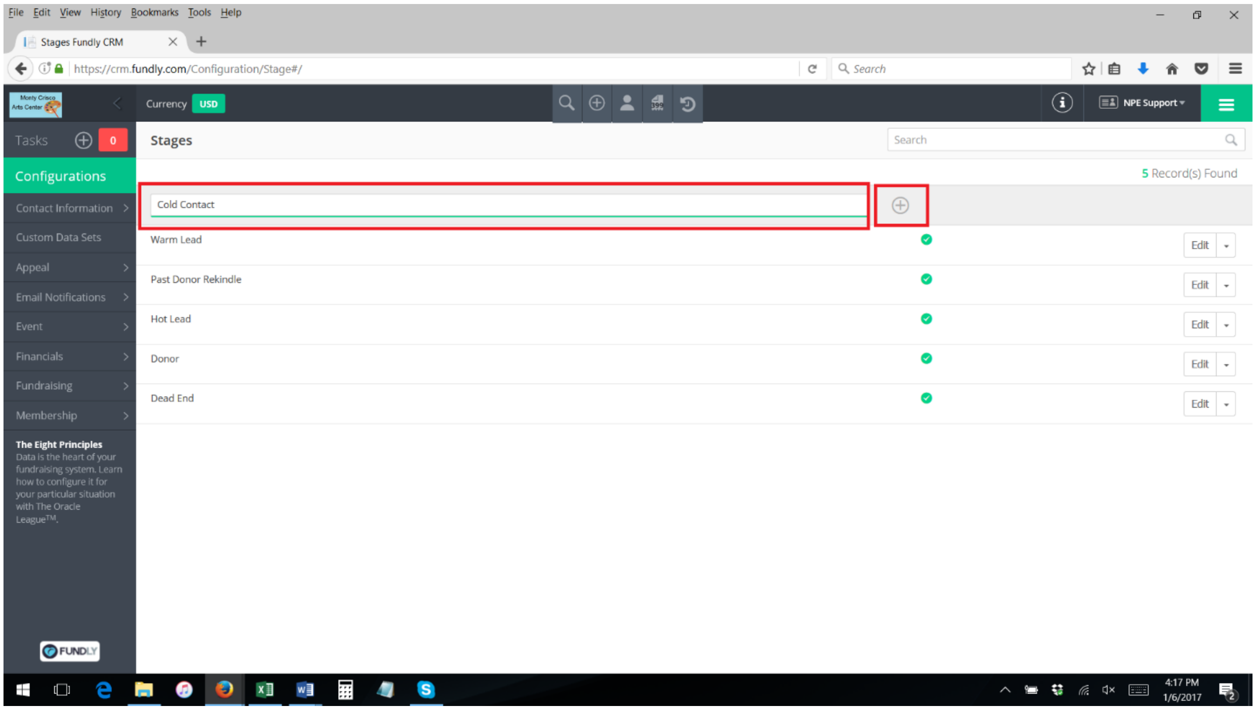
6. You can edit any stage of development by selecting “edit” from the drop down on the right. Edit/change the stage’s name/description, and then click “save.” If you wish to cancel without saving your changes, click “close” from the menu on the right.



7. You can delete any stage of development by selecting “delete” from the drop down on the right.
8. You can inactivate any stage of development by clicking on the green “check mark” – this will allow you to keep historical data but will remove the stage of development from the drop down box on the Stages of Development module.



9. To add a new stage of development, type the stage name (such as “prospect,” “lead,” “cultivate,” “stewardship,” etc.) in the Description field and click the “**+**” sign to the right of the description to add it. Ideally, your stages – taken together as a whole – will represent a continuum from a “cold lead” (someone you have identified for cultivation) all the way to a “landed lead” (someone who is now engaged with your organization the way you wanted them to be).



10. You can re-order the stages of development by hovering over any stage until you get the four-headed arrow, then click and drag that stage to where you want it to appear in the list.
11. After configuring the Stages of Development, you can now add these stages to a contact’s record in the Stage of Development module. See the **“**[Stage of Development Part II – Add/Edit Contact’s Stage of Development]” tutorial for more information.