Pipeline: Moving deals to another pipeline@

This article applies to:

Max

Follow these steps if you need to move a deal to a different pipeline

1. Click on the deal

?S	New Lead Total: \$2,000	1 දිවු	left voicemail _{Total:} \$1,500
	Tyler Smith	\$2,000	Jack Test New Deal from We
ments	+ Add a deal		

2. Click the Stage to select the pipeline and stage you would like to transfer this deal to

Total: \$1,5	Current pipeline: Marketing Services Pipeline			
(e) Jaci	New Lead	~		Move to next stage \rightarrow
New D			*	
+ Add a	Marketing Services Pipeline	>		Team members
	Consulting Services Pipeline	€ >	Ţ	JA T
			Ŧ	



3. In the Deal activity section, you will see a line item describing the move with a time stamp



 Alternatively, you can move deals to another pipeline as a bulk action by accessing the List View. To do so, navigate to the pipeline the deals are currently located in and click List to access the List View:

Board	List Analytics		
= Status	= Active		
	Title	Contacts	Owner
	Aretha Franklin	Aretha Franklin	SM
_			

5. Select one or more deals from the list and then click the**Move stage** button at the bottom of the page

ET.

	Bilbo Baggins	Bilbo Baggins	SM
	Thelissa Blackhurst	2 Thelissa Blackhurst	SM
3 Selected	Move stage	Edit value Set estimated clos	e date

6. From the Move stage view, click the dropdown to specify the pipeline you'd like to move the deals to

Move 3 deals	to a stage	
Move deals to)* 	~
		_
Remodel	Sales	>
My Sales p	pipeline	>
Sales Proc	cess	>

7. Now select the stage they should be placed into

Move 3 deals to a stage	
Move deals to*	~
< Pipeline	
New leads	
Qualified leads	

Once the desired Pipeline and stage have been specified, click the Move deals button to actually complete the move.