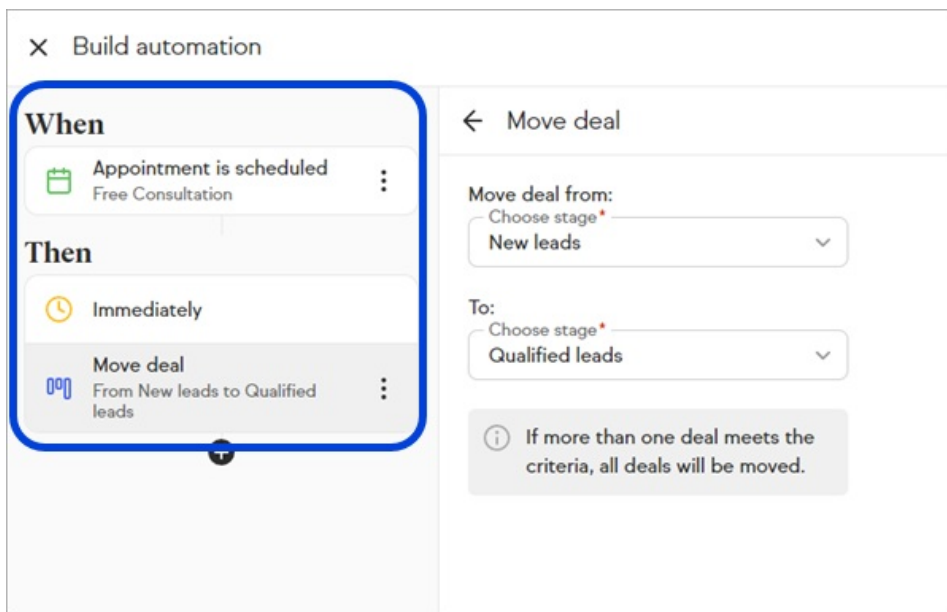


Deal move automation

This article applies to:

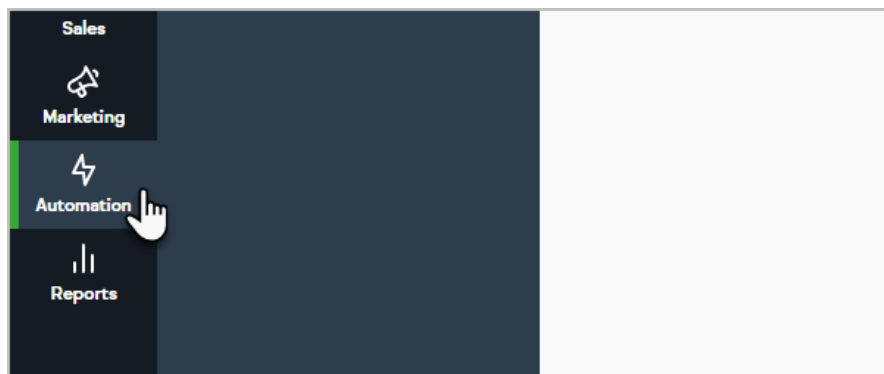
You can automatically move a deal from one stage to another based on a **When** event taking place in Easy Automation. In the example below, when the Free Consultation appointment is scheduled, we automatically move their deal from the New Leads stage to the Qualified Leads stage in the pipeline.

Please note: If more than one deal meets the **When** criteria, all deals will be moved!

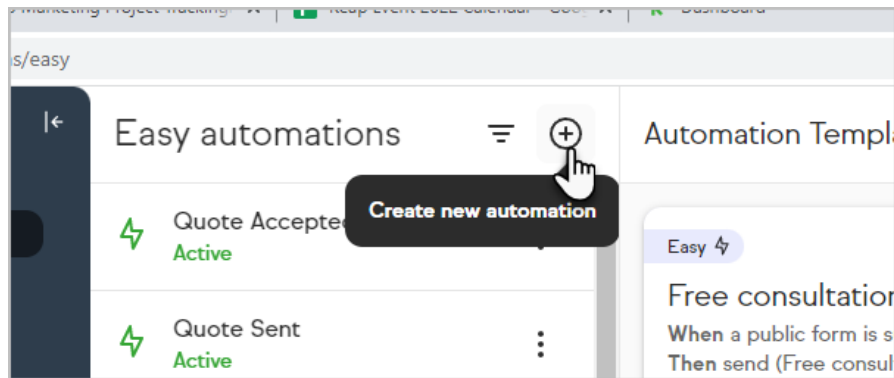


The screenshot shows the 'Build automation' interface. On the left, under the 'When' section, the trigger 'Appointment is scheduled' (Free Consultation) is selected. Under the 'Then' section, the action 'Move deal' (From New leads to Qualified leads) is selected. On the right, the 'Move deal' configuration panel shows 'Move deal from:' set to 'New leads' and 'To:' set to 'Qualified leads'. A note at the bottom right states: 'If more than one deal meets the criteria, all deals will be moved.'

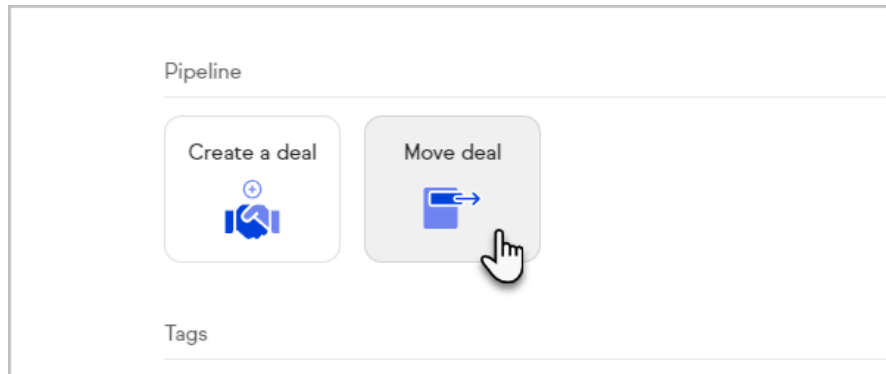
1. Go to **Automation** in the side panel menu



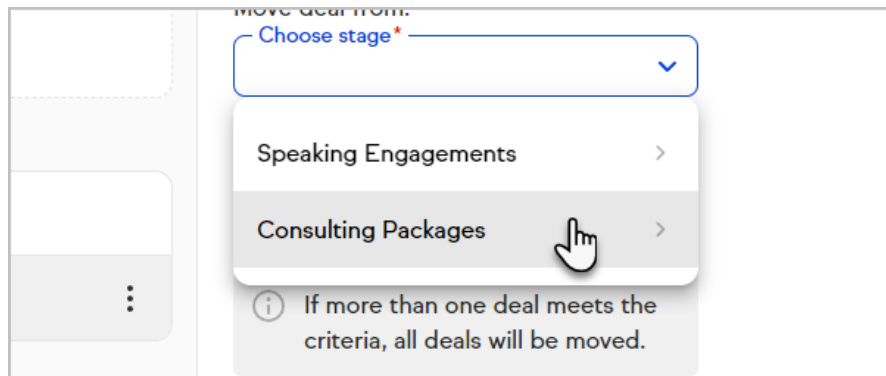
2. Start a new easy automation, or open an existing one



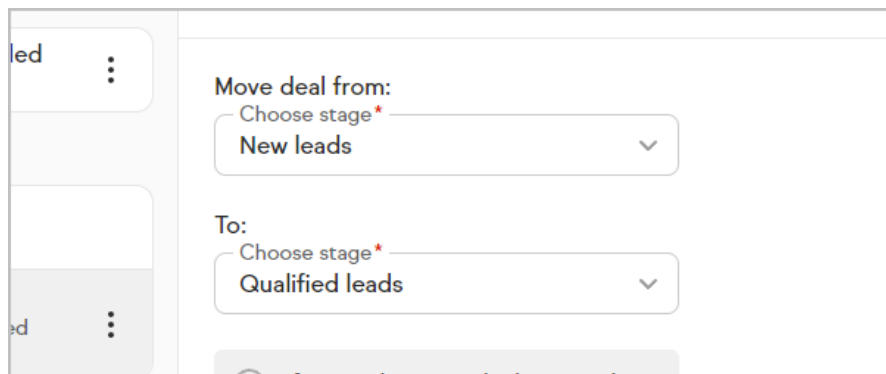
3. When choosing the **Then** event, select **Move deal**



4. If you have multiple Pipelines, you'll need to first choose the correct Pipeline



5. Now, select your **Move deal from** and **To** stages



6. Save your changes and Publish your Automation

