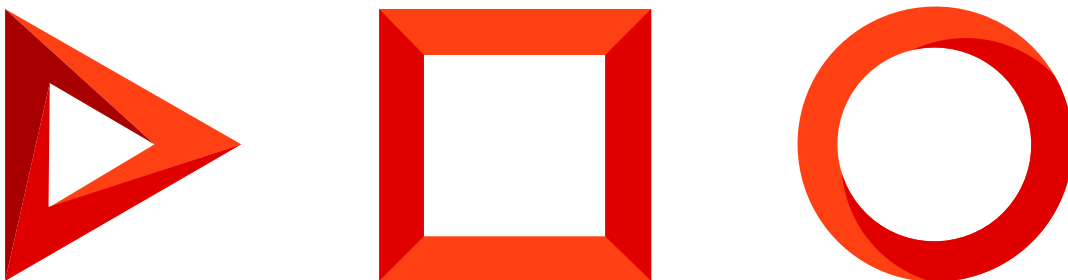


# Opportunity stages

Set up opportunity stages

Version 7.17



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PRODUCTS: SALES ENTERPRISE

You can set up the opportunity stages in the [ *Opportunity stages* ] lookup. Here you can set up the following features:

- The general list of all possible opportunity stages.
- Specify whether the stage will display on the stage progress bar on the opportunity page.
- Specify whether the stage will display in the sales pipeline.
- Specify the stage sequence in the sales pipeline.
- The maximum probability value that you can specify for an opportunity at a stage.

The setup procedure is as follows:

1. Click  to open the System Designer.
2. Open the [ *Lookups* ] section.
3. In the “Opportunities” lookup folder, open the [ *Opportunity stages* ] lookup.
4. Edit the stage settings according to your business task. You can edit the stage settings using the editable list or the stage page by clicking . The stage settings are described below.

Name	Description
Number	The number is used to define the sequence of stages in the sales pipeline. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .
Description	In the description of the stage, you can specify when the sale must be transferred to the next stage. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .
Maximum probability	The maximum available value, in percent, that can be specified in the [ <i>Probability</i> ] field of the opportunity edit page to indicate the possibility of successful opportunity closure on the given stage. The column is not displayed by default, however you can add it manually. Learn more: <a href="#">Set up columns</a> .
Period for planning the next step, days	The maximum interval between activities scheduled for an opportunity on the given stage. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .
Final	Select this checkbox if the given stage is the last stage of the opportunity.
Successful	Select this checkbox for the final stages of the won opportunities. The field is non-editable if the [ <i>Final</i> ] checkbox is not selected.
Show in funnel	Select the checkbox to enable corresponding stage in the “Sales Pipeline” dashboard.
Show in progress bar	Select the checkbox to enable corresponding stage on the workflow bar of the opportunity page. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .