**Setup Pipeline Stage**

[**https://helpdesk.moonstride.com/support/solutions/articles/64000263321-setup-pipeline-stage**](https://helpdesk.moonstride.com/support/solutions/articles/64000263321-setup-pipeline-stage)

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**Overview of Pipeline Stages**

The **Pipeline View** in moonstride allows you to see exactly where each lead is in your workflow—whether that’s at the enquiry, quotation, or booking stage. You’ll also get instant visibility of all outstanding tasks connected to your leads or enquiries.

moonstride gives you flexibility to configure your **Sales Pipeline Stages** based on your business process, each linked to the three core areas: Enquiry, Quotation, and Booking. You can even set up custom sub-stages for each main stage and visually track each lead’s journey using both **Pipeline View** and **Pipeline Stage** screens.

*Insert screenshot here of both Pipeline View and Pipeline Stage screens.*

**Navigating to Pipeline Stages**

To add or manage pipeline stages:

* Go to **Widgets** > **Widget** > **Pipeline Stage**.

*Insert screenshot here showing the navigation menu with Pipeline Stage highlighted.*

Here, you can view, add, edit, or delete stages as required.

**Adding a New Pipeline Stage**

To add a Pipeline Stage:

1. On the **Pipeline Stage** screen, click the **Add** button.
2. You’ll be redirected to a form to create the new stage.

*Insert screenshot here showing the Add button and the stage creation form.*

**Field explanations:**

* **Stage Name:** Enter the name for your new pipeline stage.
* **Stage Linked To:** Select which main stage (Enquiry, Quotation, or Booking) this stage is associated with.

Click **Save** to add your new stage.

For full details on adding, editing, or deleting pipeline stages, see the [Sales Pipeline Stages](https://platform.openai.com/playground/prompts) section.

**Switching to Pipeline View**

To see your pipeline visually:

* Click the **Pipeline View** button at the top left of the Pipeline Stage screen, or navigate to **CRM** > **Enquiry** > **Pipeline View**.

*Insert screenshot here showing the Pipeline View button and what the Pipeline View screen looks like.*

In **Pipeline View**, you will see the stages you’ve set up, with leads and opportunities sorted into their current status. You’ll find a range of action shortcuts—such as editing or cancelling an enquiry, editing a quotation or booking linked to an enquiry, adding or viewing notes or tasks, and even viewing the symbols of services added to each record.

**Filtering and Managing Enquiries in Pipeline View**

* To filter enquiries, click the **Filter** button in the top left corner.

*Insert screenshot here with Filter button and the filter criteria dialog.*

You can search by:

* Enquiry Date (From – To)
* Created By
* Travel Category
* Status
* Source of Enquiry
* Assign To
* Shared With

After entering your criteria, click **Search** to see the filtered results.

To add a new enquiry directly from this screen, click the **Add** button in the top left corner.

*Insert screenshot here showing the Add button on Pipeline View.*

**Changing Pipeline Stage Status**

To activate or deactivate any defined pipeline stage:

1. Go to **Widgets** > **Widget** > **Pipeline Stage**.
2. Click on the status displayed beside the stage you want to update.

*Insert screenshot here showing how to change the active/inactive status of a stage.*

**Sorting Pipeline Stages**

You may wish to control the order in which stages appear in Enquiry, Quotation, and Booking.

1. On the **Pipeline Stage** screen, enter your preferred sequence number in the **Sort Order** column for each stage.
2. Click the **Save Sequence** button at the top left when you’re finished.

*Insert screenshot here of the Sort Order fields and Save Sequence button.*

**Further Guidance**

For in-depth information about adding, editing, and deleting pipeline stages, please refer to the [Sales Pipeline Stages](https://platform.openai.com/playground/prompts) section.

If you need any assistance or have questions, our support team is happy to help.