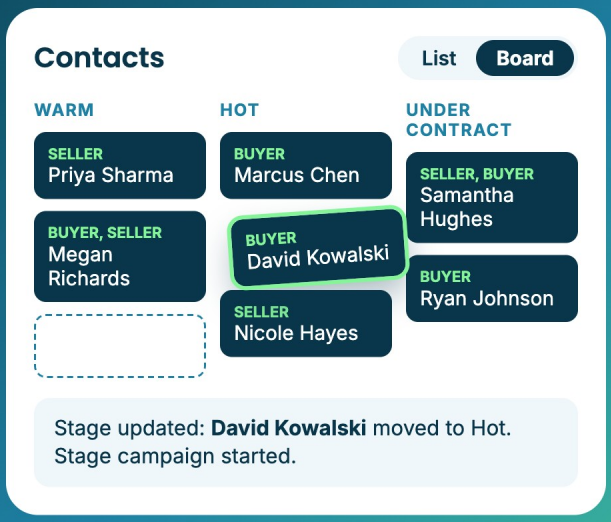
RISE

By MoxiWorks

Workflow Stages

See Your Pipeline. Move It Forward.



01	02	03	04	05	06
Lead	**Nurture**	**Warm**	**Hot**	**Under Contract**	**Post Close**
New or unqualified	Long-term, stay top of mind	Real interest showing	Touring or listing	Working to close	Past client to retain

What It Does

Every contact sits in one stage of the client journey. Board view turns those stages into a pipeline you can drag and drop.

Why It Matters

- Trigger stage-matched campaigns
- Get notified when a stage changes
- Filter and group contacts by stage
- See your whole pipeline at a glance

Before You Start

Contacts never move stages on their own. Moving the card is what fires stage-driven automation, so you stay in control.

Common Question

"Why won't my Stage Change campaign start?"

Select All Contacts as recipients. It still only sends to contacts whose stage matches.

Quick Setup

1. Go to Contacts > Overview and toggle to Board.
2. Drag a contact's card to its new stage column.
3. Updating many at once? Use bulk actions in List view.
4. Build a campaign with Stage Change as the trigger or Stage as a condition.

Move your cards at the end of each day. Stage campaigns do the rest.

Learn More

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