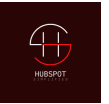


Automate lifecycle stage of contacts

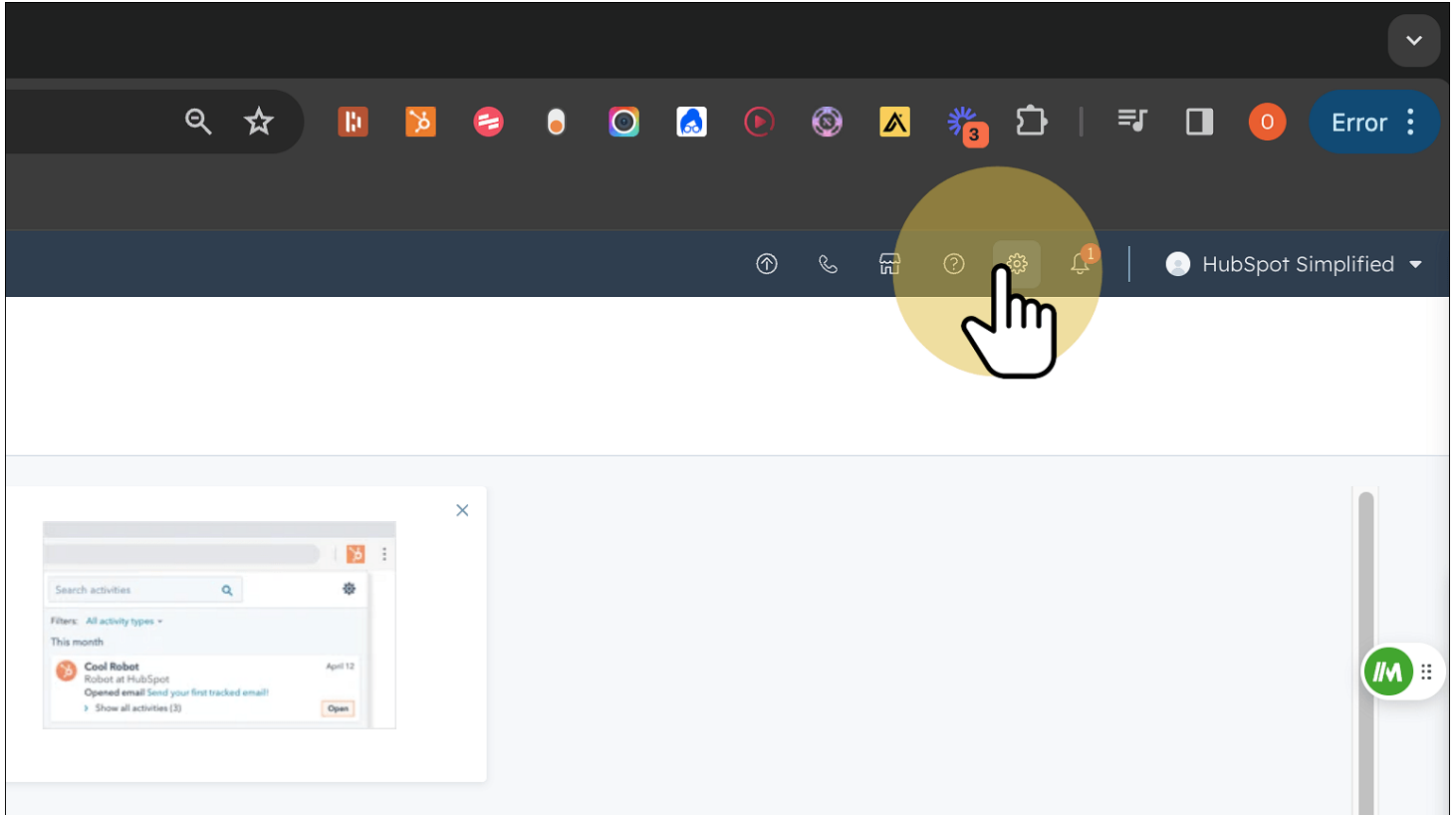


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1 Go to 'Settings'	3
2 Click on 'Objects'	4
3 Select 'Contacts'	5
4 Select 'Lifecycle stage'	6
5 Enable the 'Set lifecycle stage when a contact or company is created'	7
6 Set the lifecycle stage as per your business process	8
7 Enable the same for 'Set lifecycle stage when a deal is created and set a lifecycle stage as per your business requirements	9
8 Enable it for 'Set lifecycle stage when a deal is won and set the lifecycle stage as per your business requirements.	10
9 And that is it! HubSpot will now automatically set the lifecycle stage for contacts as per the rules we just defined.	11

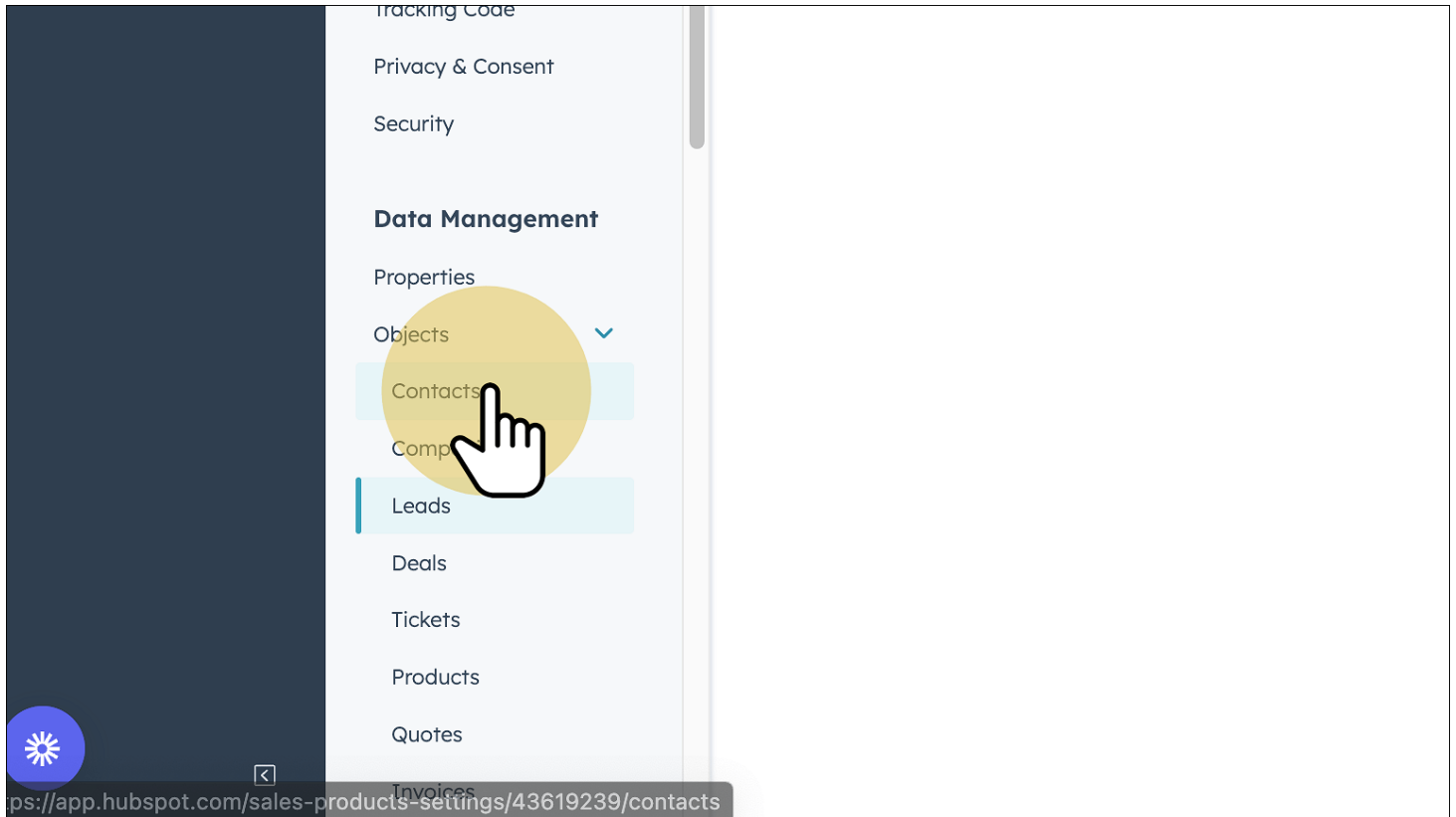


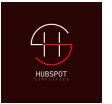
1 Go to 'Settings'



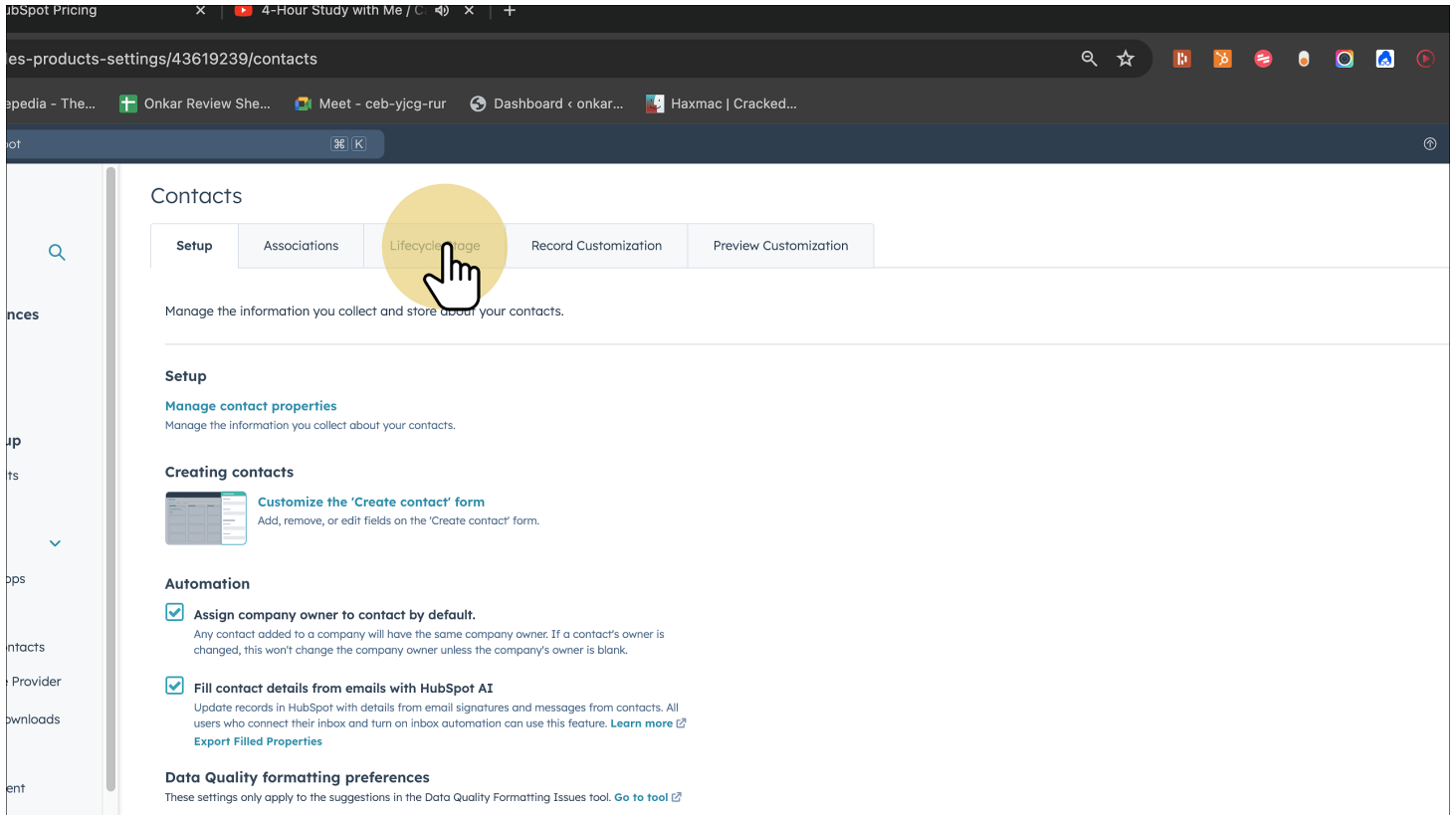


3 Select 'Contacts'





4 Select 'Lifecycle stage'





5 Enable the 'Set lifecycle stage when a contact or company is created'

Workspaces

CRM

Marketing

Content

Commerce

Automations

Reporting & Data

Library

Setup
Associations
Lifecycle Stage
Record Customization
Preview Customization

Integrations using preset values for the 'lifecyclestage' will need to update. Update your integration to use the [CRM Properties API](#) to get the details of the property.

Track contacts as they move through your marketing and sales processes. [Learn more about lifecycle stages](#)

Automation

Sync lifecycle stages
Update a contact's lifecycle stage whenever their primary company's stage changes. Note: This setting doesn't apply when a company moves backwards in your process.

Set lifecycle stage when a contact or company is created
Set a stage for new contacts or companies created in HubSpot

Set lifecycle stage when a deal is created
Set a stage for associated contacts and companies when a deal is created or newly associated

Set lifecycle stage to

Set lifecycle stage when a deal is won
Set a stage for associated contacts and companies when a deal is won

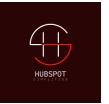
Set lifecycle stage to

Configure

Stages are listed in the order contacts and companies will move through them.

STAGE NAME	USED IN
Subscriber	0
Lead	920

Save
Cancel



6 Set the lifecycle stage as per your business process

Automation

Sync lifecycle stages
Update a contact's lifecycle stage whenever their primary company's stage changes. Note: This setting doesn't apply when a company moves backwards in your process.

Set lifecycle stage when a contact or company is created
Set a stage for new contacts or companies created in HubSpot

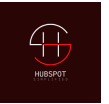
Set lifecycle stage to

- Lead
- Subscriber
- Marketing Qualified Lead
- Sales Qualified Lead
- Opportunity

Configure

Stages are listed in the order contacts and companies will move through them.

STAGE NAME	USED IN
Subscriber	0
Lead	920



7 Enable the same for 'Set lifecycle stage when a deal is created and set a lifecycle stage as per your business requirements

Settings 🔍

Your Preferences

General

Notifications

Account Setup

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Integrations ▼

Connected Apps

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Email Service Provider

Marketplace Downloads

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Security

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Properties

Objects ▼

Contacts

Companies

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Deals

Tickets

Products

Quotes

Setup Associations Lifecycle Stage Record Customization Preview Customization

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Automation

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Set lifecycle stage when a contact or company is created
Set a stage for new contacts or companies created in HubSpot

Set lifecycle stage to
Lead ▼

Set lifecycle stage when a deal is created
Set a stage for associated Contacts and companies when a deal is created or newly associated

Set lifecycle stage to
Opportunity ▼

Search 🔍

Marketing Qualified Lead

Sales Qualified Lead

Opportunity

Customer

Evangelist

Other

Configure

Stages are listed in order of how they will move through them.

STAGE NAME	USED IN
Subscriber	0
Lead	920



8 Enable it for 'Set lifecycle stage when a deal is won and set the lifecycle stage as per your business requirements.

Settings Q

Your Preferences

General

Notifications

Account Setup

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Contacts

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Setup
Associations
Lifecycle Stage
Record Customization
Preview Customization
View contacts in

Integrations using preset values for the 'lifecyclestage' will need to update. Update your integration to use the [CRM Properties API](#) to get the details of the property.

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Set lifecycle stage to
Lead

Set lifecycle stage when a deal is created
Set a stage for associated contacts and companies when a deal is created or newly associated

Set lifecycle stage to
Opportunity

Set lifecycle stage when a deal is won
Set a stage for associated contacts and companies when a deal is won

Set lifecycle stage to
Customer

Search

Marketing Qualified Lead

Sales Qualified Lead

Opportunity

Customer

Evangelist

Other

Configure

Stages are listed in order of how they will move through them.

STAGE NAME	USED IN
Subscriber	0
Lead	920



9 And that is it! HubSpot will now automatically set the lifecycle stage for contacts as per the rules we just defined.

Setup Associations Lifecycle Stage Record Customization Preview Customization [View contacts in the data model overview](#)

Integrations using preset values for the 'lifecyclestage' will need to update. Update your integration to use the [CRM Properties API](#) to get the details of the property.

Track contacts as they move through your marketing and sales processes. [Learn more about lifecycle stages](#)

Automation

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Set lifecycle stage to
Opportunity

Set lifecycle stage when a deal is won
Set a stage for associated contacts and companies when a deal is won

Set lifecycle stage to
Customer

Search

Subscriber

Lead

Marketing Qualified Lead

Subscriber

Sales Qualified Lead

Opportunity

Lead

Customer

will move through them.

STAGE NAME	USED IN
Subscriber	0
Lead	920