

Using Revenue Model Inventory Stages

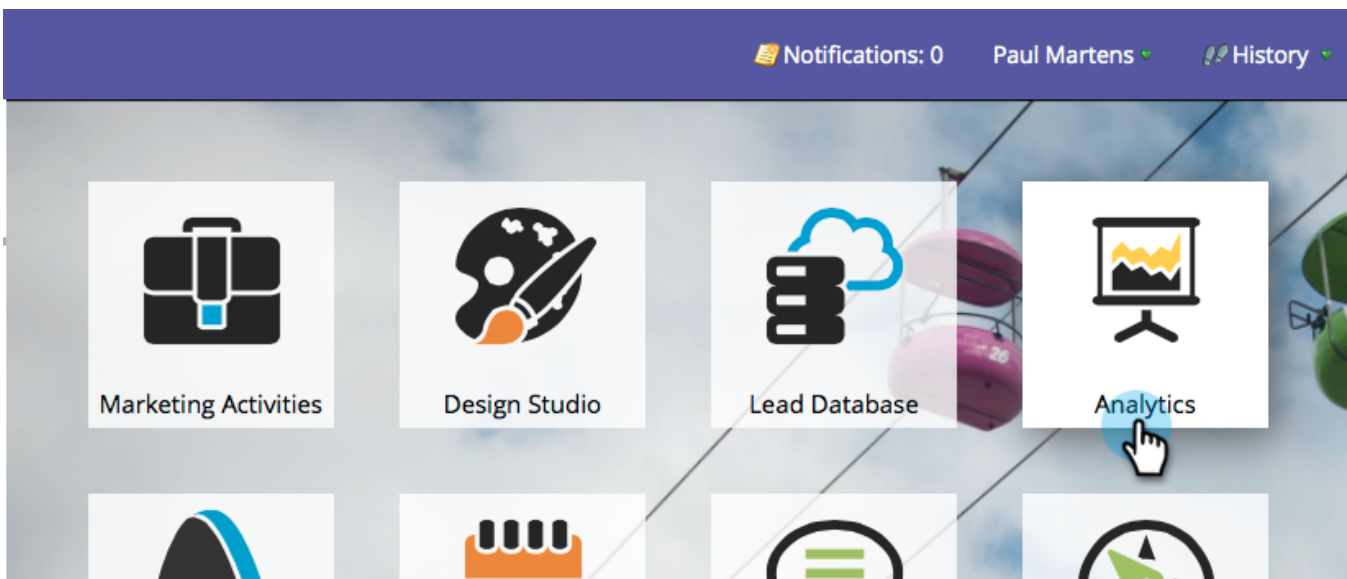
All known leads and accounts initially reside in the Inventory Stage. This prospect pool is where leads are nurtured until sales-ready. There is no time limit on an inventory stage.

Tip

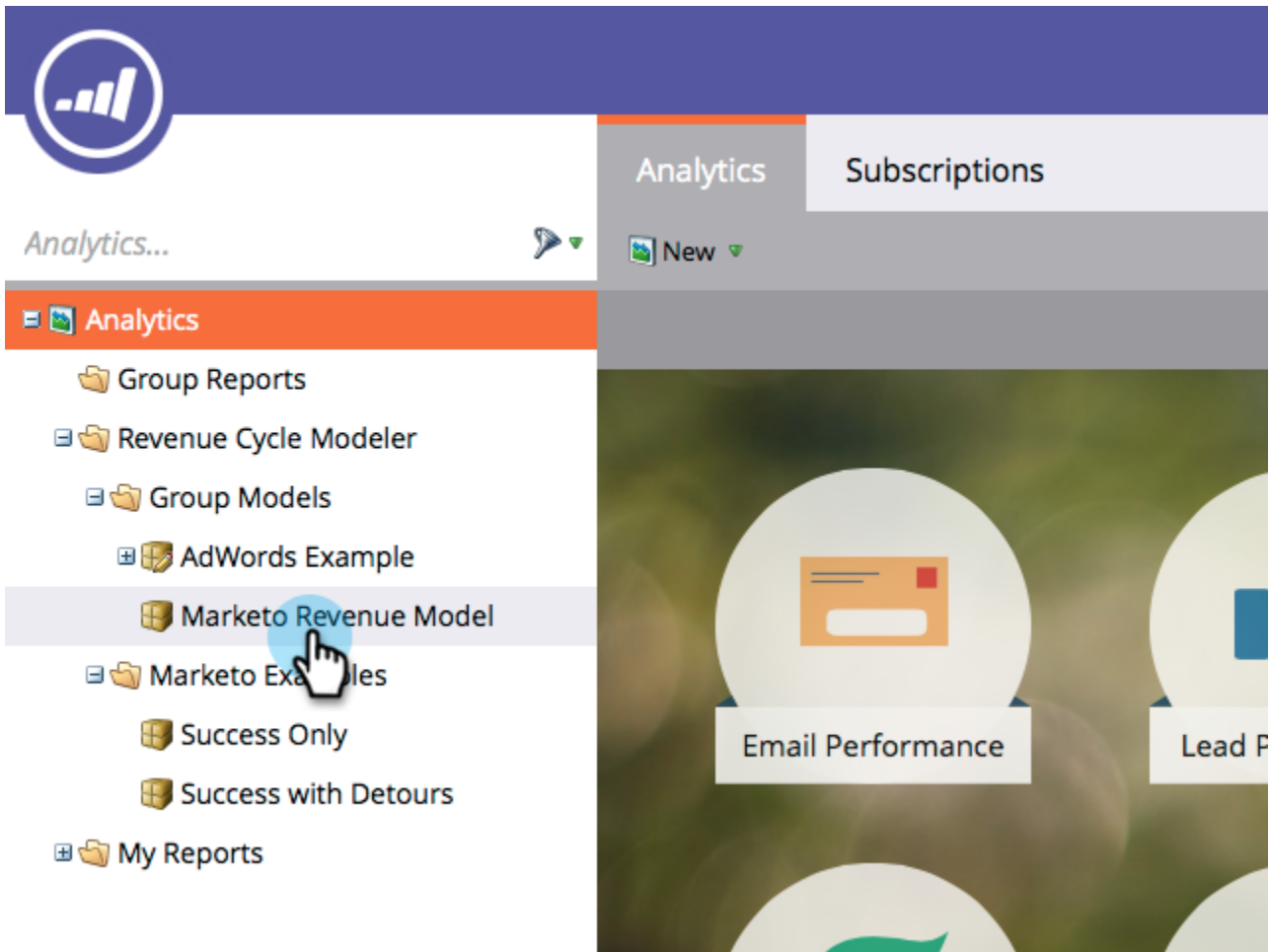
It's a great idea to create a practice model in a graphics or presentation program and confirm it with your colleagues first.

Add An Inventory Stage

1. To add a new Revenue Cycle Model Inventory stage, click the **Analytics** button in the **My Marketo** home screen.



2. In the **Analytics** section, select your existing model, or [create a new one](#).



3. Click **Edit Draft**.

My New Model

New ▾

Model Actions ▾

Edit Draft

Preview Model



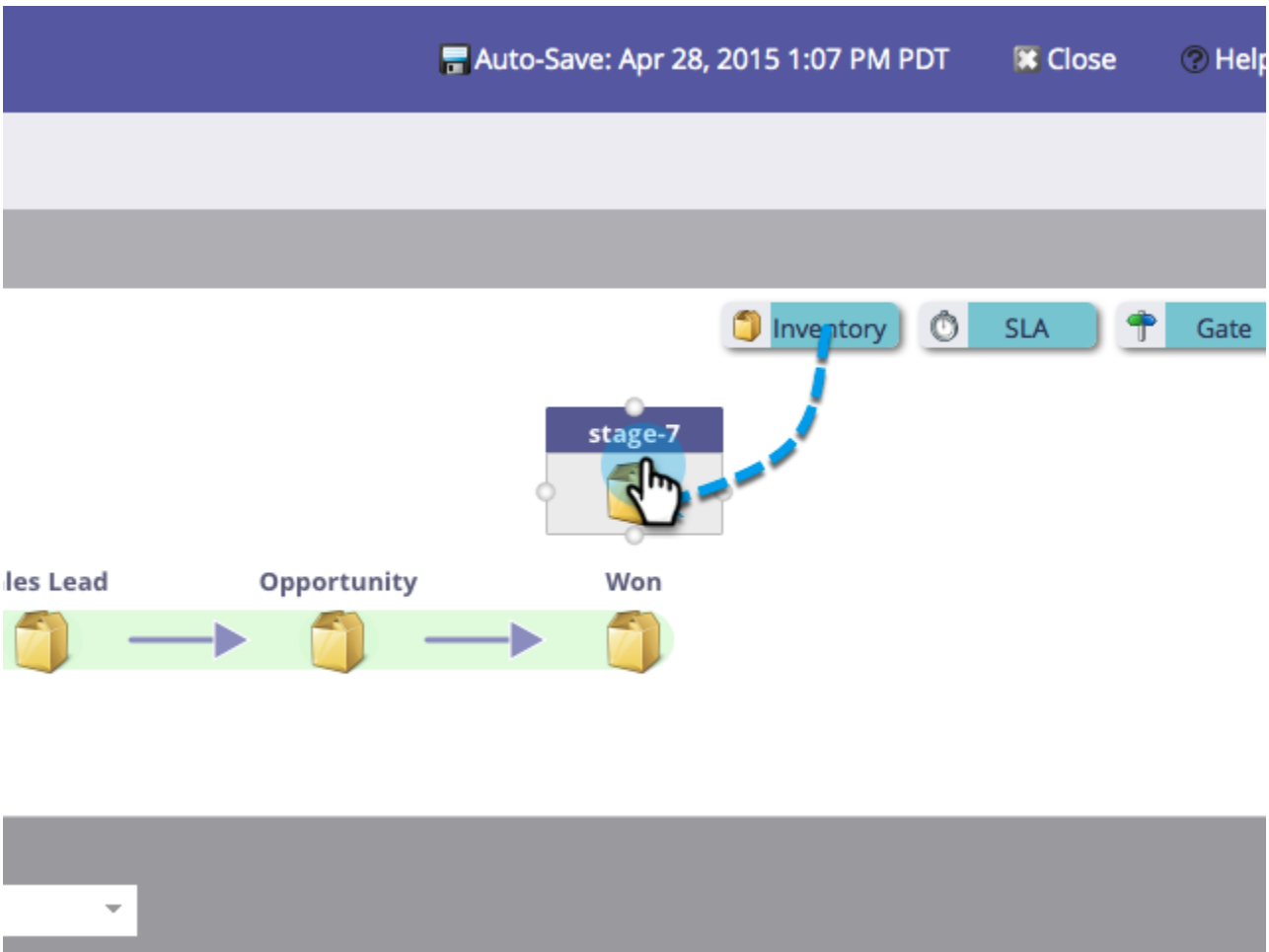
My New Model

Model Status: Draft

Approved: No

Stages: 6

4. To add a new inventory stage, click the **Inventory** button, then drag and release to anywhere within the canvas.



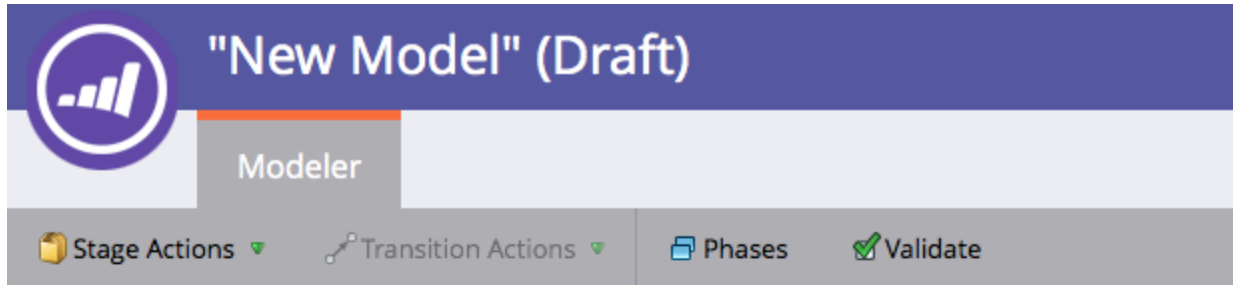
5. You are free to edit the Name, add a Description and adjust the Type after adding a stage. You may also select **Start Tracking by Account** at this time.

The screenshot displays the "New Model" (Draft) interface. The top header shows "Auto-Save: Apr 27, 2015 1:10 PM PDT" and "Close" and "Help" buttons. The "Modeler" tab is active, with a toolbar containing "Stage Actions", "Transition Actions", "Phases", and "Validate". A toolbar at the bottom right includes "Inventory", "SLA", and "Gate" buttons. The main workspace shows a process flow with stages: "Anonymous", "Known", "Lead", "Sales Lead", "Opportunity", and "Won", each with an icon and arrow. A "stage-7" box is added to the flow. A "Stage Properties" dialog box is open at the bottom, with a blue border. It contains the following fields: "Name: stage-7", "Description:" (empty), "Type: Inventory" (dropdown menu), and a checked checkbox for "Start Tracking by Account".

Edit an Inventory Stage

When you select an Inventory icon you may edit the **Name**, add a **Description** or adjust the **Type**. You may also select [Start Tracking by Account](#).

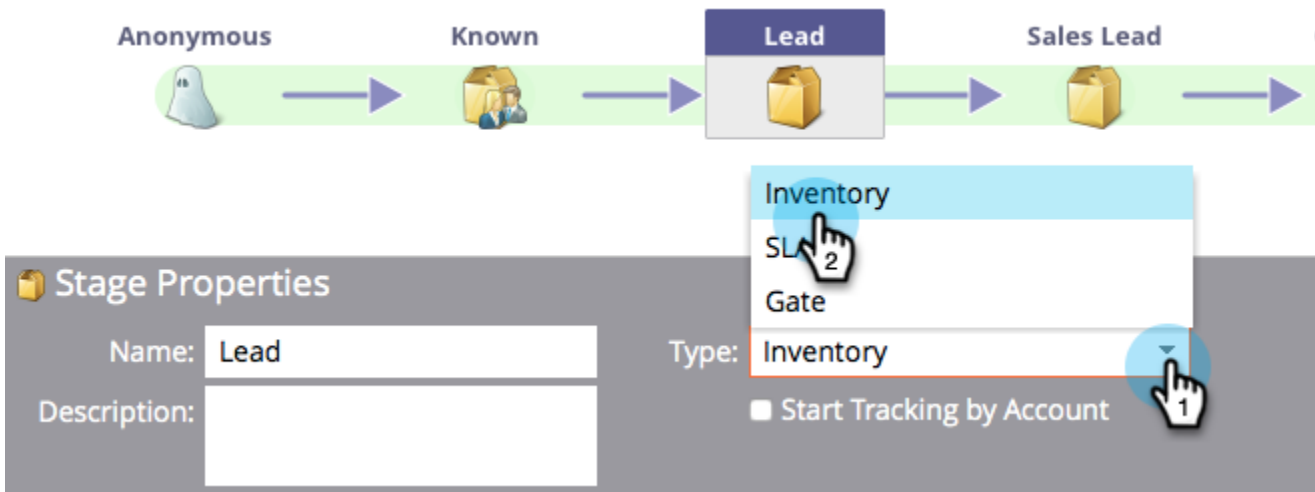
1. Click an Inventory icon.



2. Click within the **Name** and **Description** fields to edit their content.

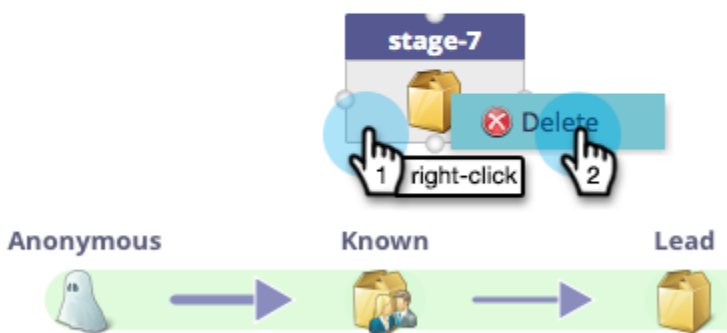
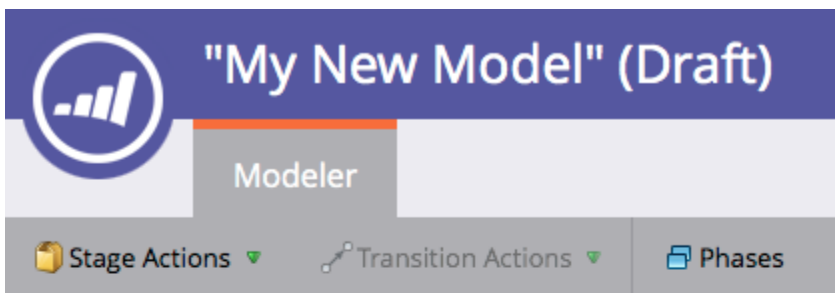


3. Select the **Type** pulldown to edit.

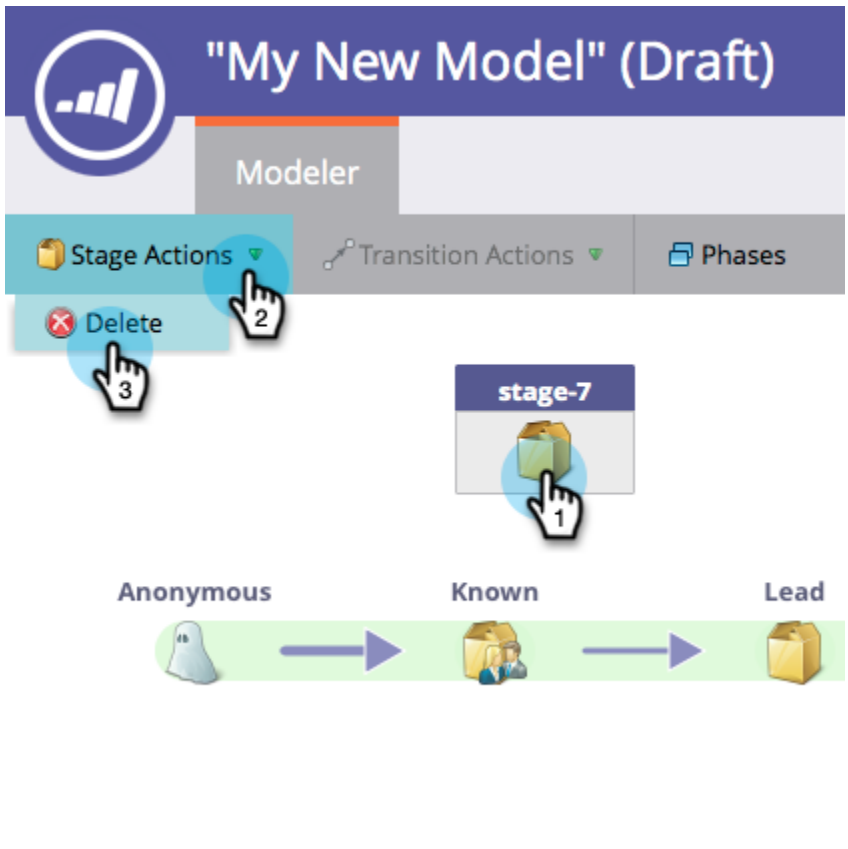


Delete An Inventory Stage

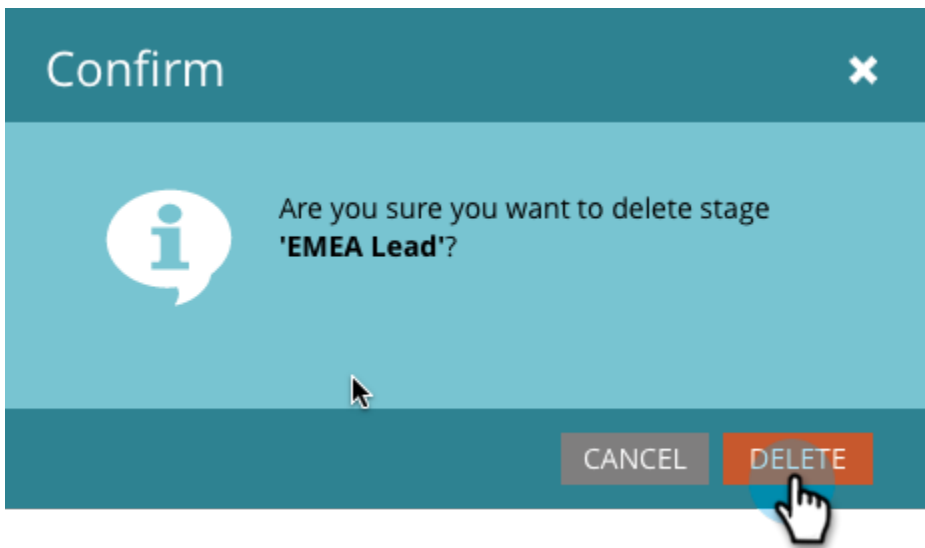
1. You may delete an Inventory Stage by right clicking or control clicking an inventory stage icon.



2. You may also delete a stage by clicking it, then in the **Stage Actions** dropdown, select **Delete**.



3. Both methods of deletion ask you to confirm your choice. Click **Delete**.



Congrats! Now you understand the wonderful world of Inventory Stages.