

Using Revenue Model SLA Stages

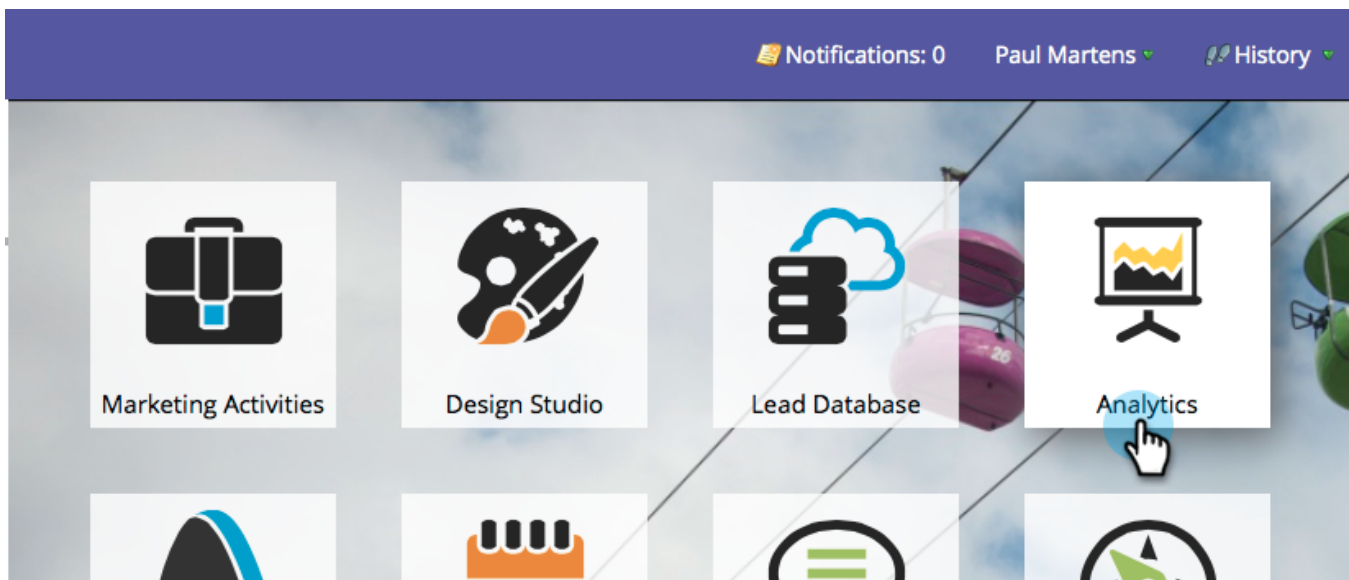
SLA stands for “service level agreement.” These stages are used when there is a defined maximum time in which a lead needs to be evaluated or processed before moving forward or out of the process.

Tip

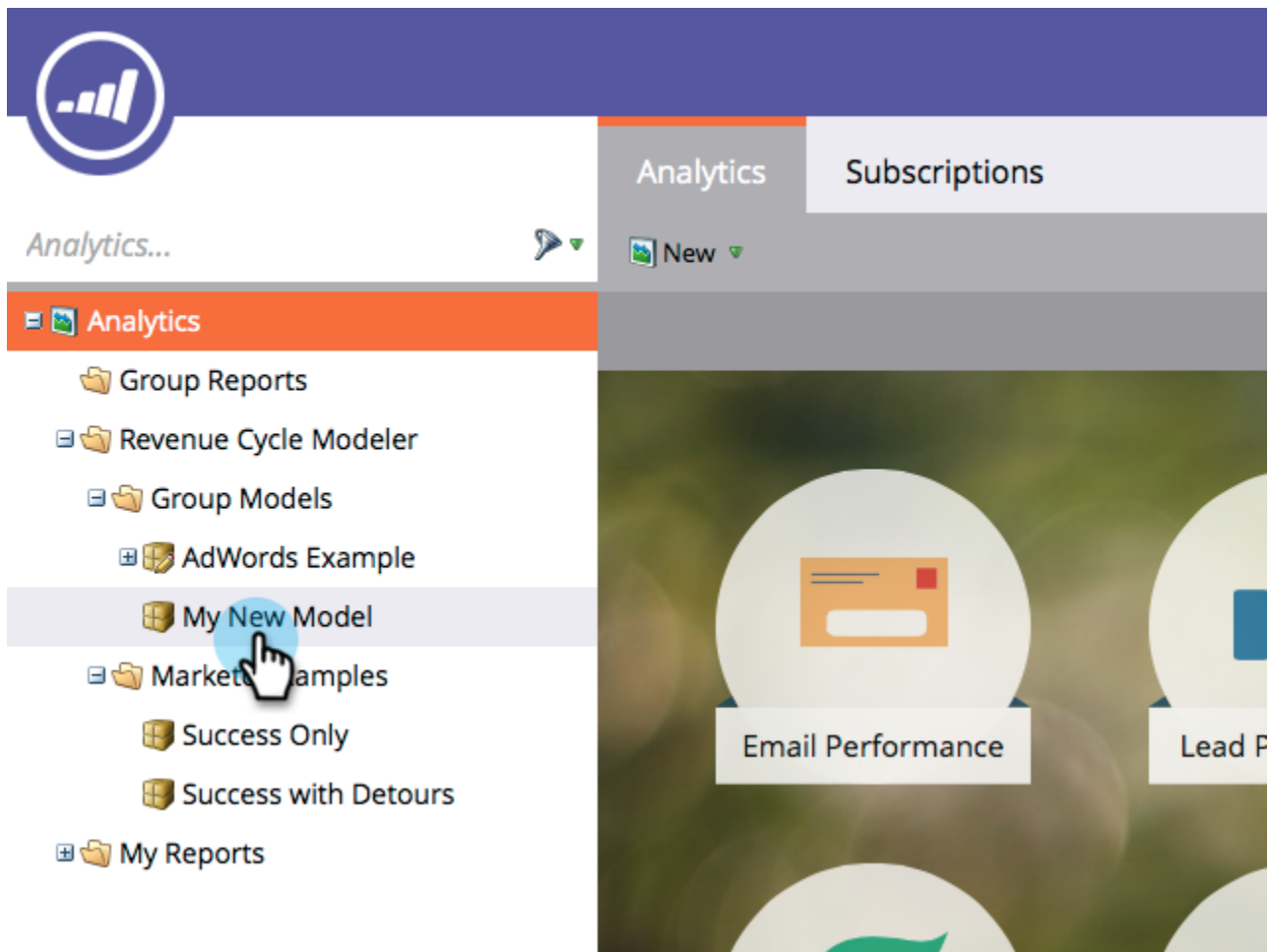
It's a great idea to create a practice model in a graphics or presentation program and confirm it with your colleagues.

Add An SLA Stage

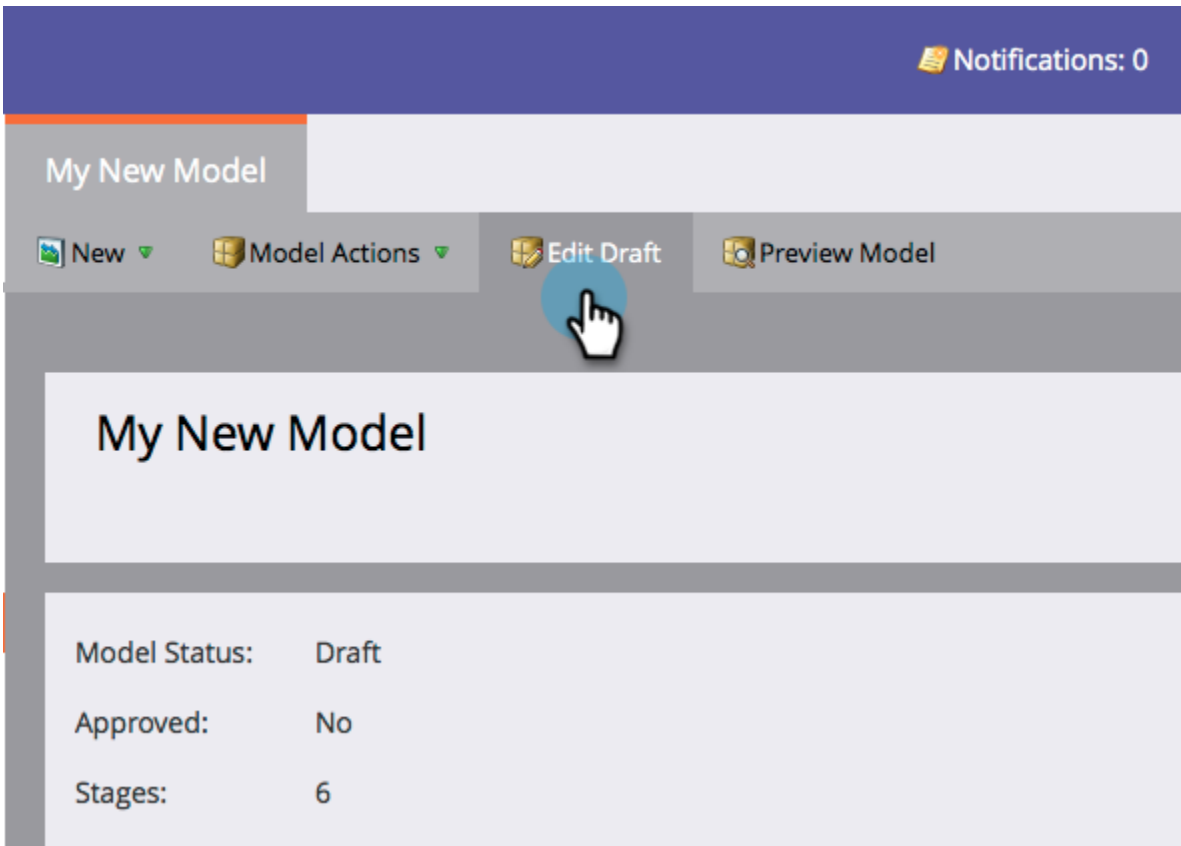
1. To add a new Revenue Cycle Model SLA stage, click the **Analytics** button in the My Marketo home screen.



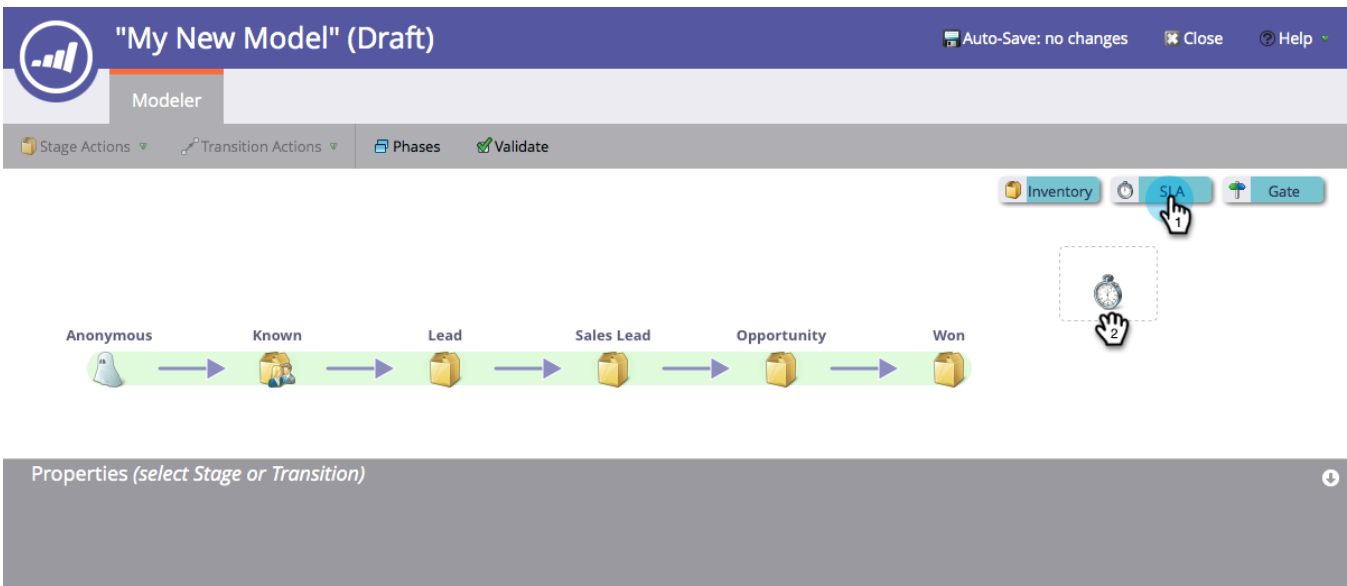
2. In the Analytics section, select your existing model, or [create a new one](#).



3. Click **Edit Draft**.



4. To add a new SLA stage, click the **SLA** 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.

"My New Model" (Draft) Auto-Save: Apr 27, 2015 3:21 PM PDT Close Help

Modeler

Stage Actions Transition Actions Phases Validate

Inventory SLA Gate

Anonymous → Known → Lead → Sales Lead → Opportunity → Won

stage-7

Stage Properties

Name: stage-7 Type: SLA

Description: Start Tracking by Account

Max Age: 7 days

Edit an SLA Stage

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

1. Click an SLA stage icon.

Inventory SLA Gate

Anonymous → Known → Engaged → Lead → Sales Lead → Opportunity → Won

Recycling Disqualified Lost

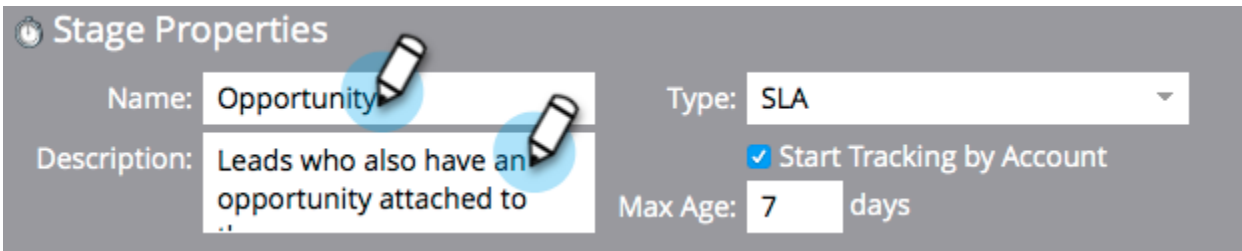
Stage Properties

Name: Opportunity Type: SLA

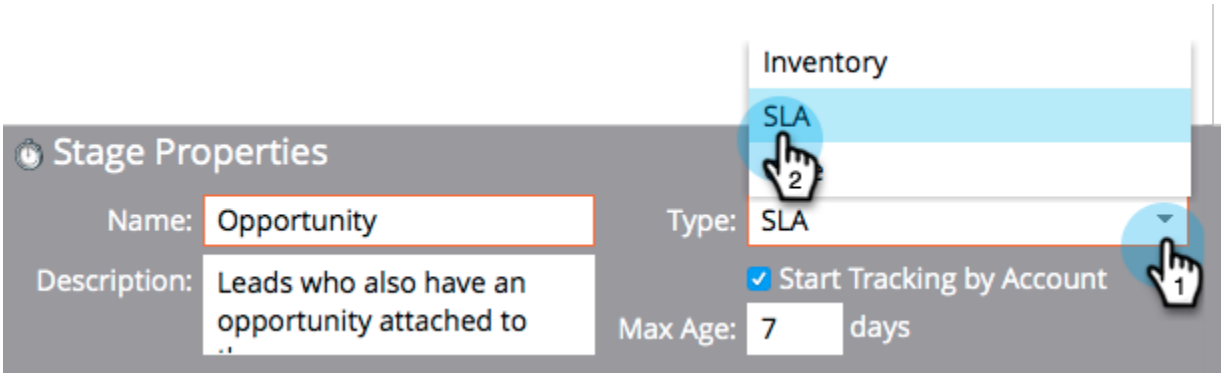
Description: Leads who also have an opportunity attached to Max Age: 7 days

Start Tracking by Account

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

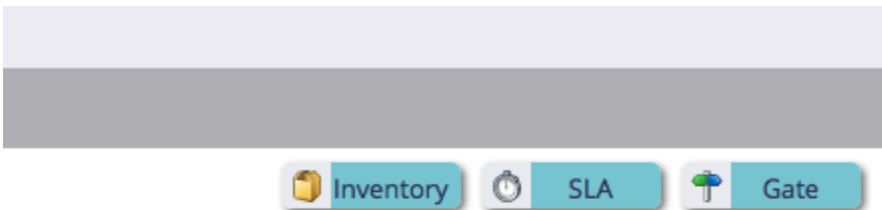


3. Select the **Type** pulldown to edit.



Delete An SLA Stage

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



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



"Success with Detours Clone" (Draft)

Modeler

Stage Actions

Transition Actions

Phases

Validate

Edit Transition Order

Delete

