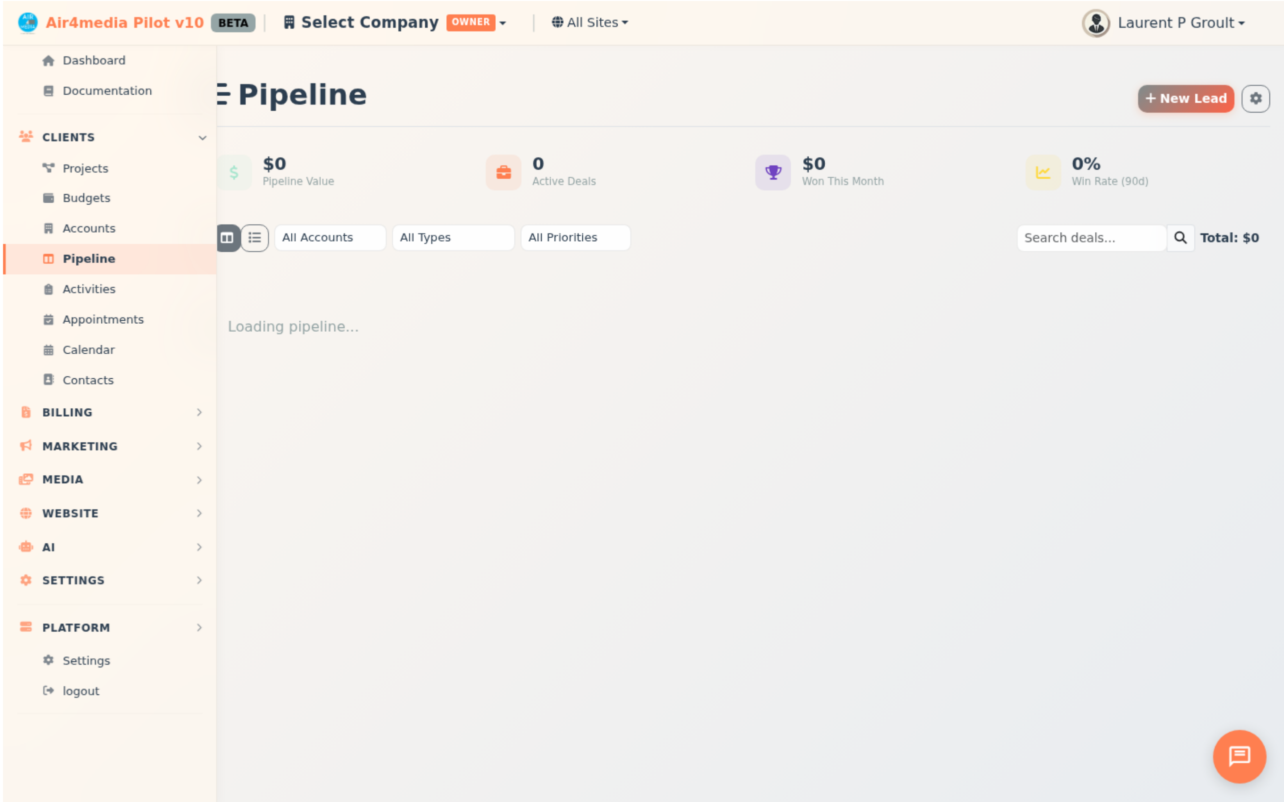

Pipeline

The Pipeline page gives you a visual overview of all your deals, showing where each opportunity stands across your custom sales stages — from first contact through to won or lost.

Key Features

- **Kanban Board**: See all deals organized in columns by stage, with each column showing deal count and total value
- **Drag & Drop**: Move a deal to a new stage by dragging its card to the target column — the change saves automatically
- **List View**: Switch to a compact table view grouped by stage, showing deal name, account, type, value, created date, event date, and priority
- **Summary Stats**: Four cards at the top show Pipeline Value, Active Deals, Won This Month, and Win Rate (last 90 days). Click any stat card to filter the board to that segment — click it again to clear the filter
- **Toolbar Total**: A running total reflects the estimated value of all deals currently visible after any filters are applied
- **Quick Add Lead**: Click **New Lead** to add a deal — include name, account (select existing or create new on the spot), contact details, estimated value, type, event date, and notes

- **Quick View**: Click any deal card to open a detail panel showing account, contact, dates, estimated and contracted values, payment progress, recent activity, and a stage selector. A **Full Edit** link opens the complete project editor
- **Mark Won / Mark Lost**: Trophy and X buttons appear on each card and in Quick View. Marking a deal won moves it to your Won stage and automatically upgrades the account from prospect to client
- **Log Contact**: In the "Contacted" stage, a **Log Contact** button appears on each card. Record the contact method (phone call, email, meeting, SMS, or follow-up) and an optional note. A badge shows the total number of contact attempts made
- **Age Indicators**: Cards show a color-coded age badge — green for deals up to 3 days old, through red for deals older than 30 days — so stale opportunities are easy to spot
- **Priority Badges**: Cards display priority (Urgent, High, Normal, Low) as a colored badge — urgent deals are highlighted in red
- **Filters**: Narrow the board by account, deal type, or priority; search by deal or account name
- **Financial Progress**: Each card shows the estimated value and a payment progress bar
- **Custom Stages**: Click the gear icon to add, rename, reorder, and color-code your pipeline stages. Each stage maps to a project status, and one stage can be flagged as your Won stage

How to Use

1. Open **Pipeline** from the sidebar to see your Kanban board
2. Review the summary cards at the top for a quick health check — click a card to filter the board to that segment
3. Click **New Lead** to add a deal — fill in the name, account, and any available details
4. Drag a deal card from one column and drop it into the next stage to advance it
5. Use the **Account**, **Type**, or **Priority** filters — or the search box — to focus on specific deals
6. Click any card to open Quick View — review deal details, change the stage, see recent activity, or click **Full Edit** for the full project editor
7. In the "Contacted" stage, click **Log Contact** on a card to record a call, email, meeting, SMS, or follow-up attempt
8. Click the **trophy** icon to mark a deal won, or the **X** to mark it lost (you can add a reason for losing)
9. Click the **gear icon** to manage your stages — add, rename, reorder, set colors, designate a Won stage, and set the default entry stage

Tips

- **Pipeline Value** only counts active deals (not completed or cancelled), so it always reflects real open opportunities
- **Win Rate** is calculated over the last 90 days — focus on recent activity to see the most meaningful trend
- **Won This Month** counts deals that moved to contracted status within the current calendar month
- Recently won deals stay visible on the board for 30 days so you can reference them before they move off
- Set one stage as **Default** so new leads always land in the right column automatically
- **Age badges** turn red for deals older than 30 days — use them to identify deals that need follow-up
- You must keep a minimum of 2 stages; stages with active deals must have those deals reassigned before the stage can be deleted