

Anatomy of a Pipeline

Pipelines provide a clear snapshot of where your leads and clients are in their journey, ensuring seamless and efficient project management.



“I was able to set up a basic “booking” pipeline in a few minutes and because I work with a virtual assistant, it totally changed our level of productivity. Being able to see where every client is in our booking process, where I need to intervene all on one page, has saved me so much time. I no longer need to click around in individual Projects to see what’s going on in my business. I love it!”

– **Sara Meyer**, Wisconsin Balloon Decor & The Bright Balloon Podcast

Active Lead Pipelines

There are two types of Pipelines: Leads and Clients. Active Pipelines are Pipeline currently in use.

Filter

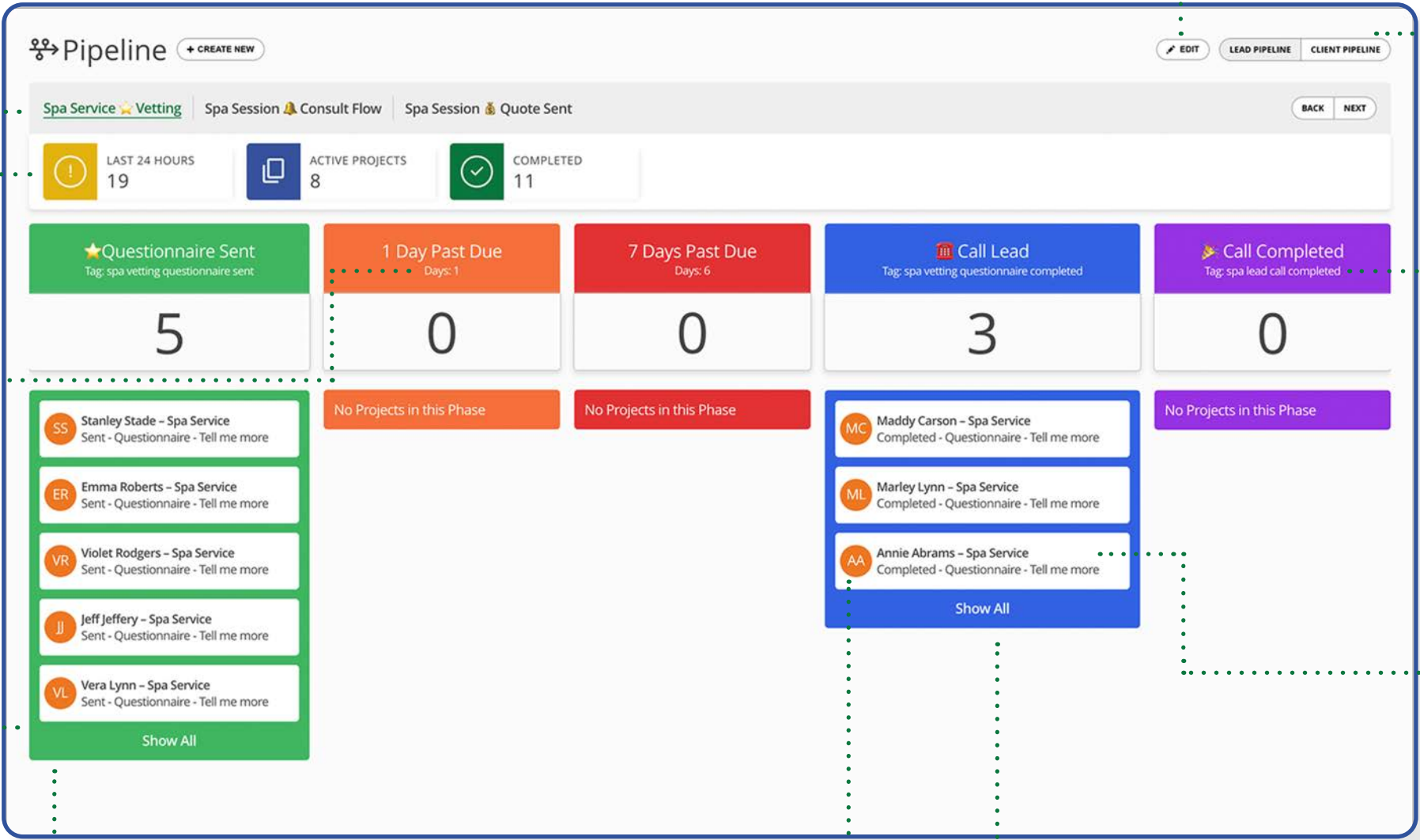
Use Filters “Last 24 Hours”, “Active Projects”, and “Completed” to view your Projects.

By Days In Prior Phase

A Phase that is designated by the amount of time a Project spends in the previous “By Tag Phase”.

Phase

Each Pipeline can hold up to five Phases. Phases represent the steps your Project takes through your Pipeline.



Pipeline

Your Pipeline will display each Phase, active number of Projects in each Phase, and 10 of your most recent Projects within each Phase.

Projects

Projects enter, move through, and complete a Pipeline with the use of Project Tags. The 10 most recent Project will be displayed in each Phase.

Edit

Edit your Pipeline to make adjustments such as change colors, type, adjust Phases or deactivate.

Pipeline Type

Pipeline can be for Clients or Leads. By selecting the type you can access your Pipelines.

By Tag Phase

A Phase that is designated by a Project Tag. When the Project Tag is picked up, the Project will be automatically be added into the Phase.

Active Projects

This number represents the amount of Active Projects in the Phase. If you have more 10 click “Show All” to view the full list of Projects.

Show All

Clicking “Show All”, will display a list of all Active Projects in that Phase.