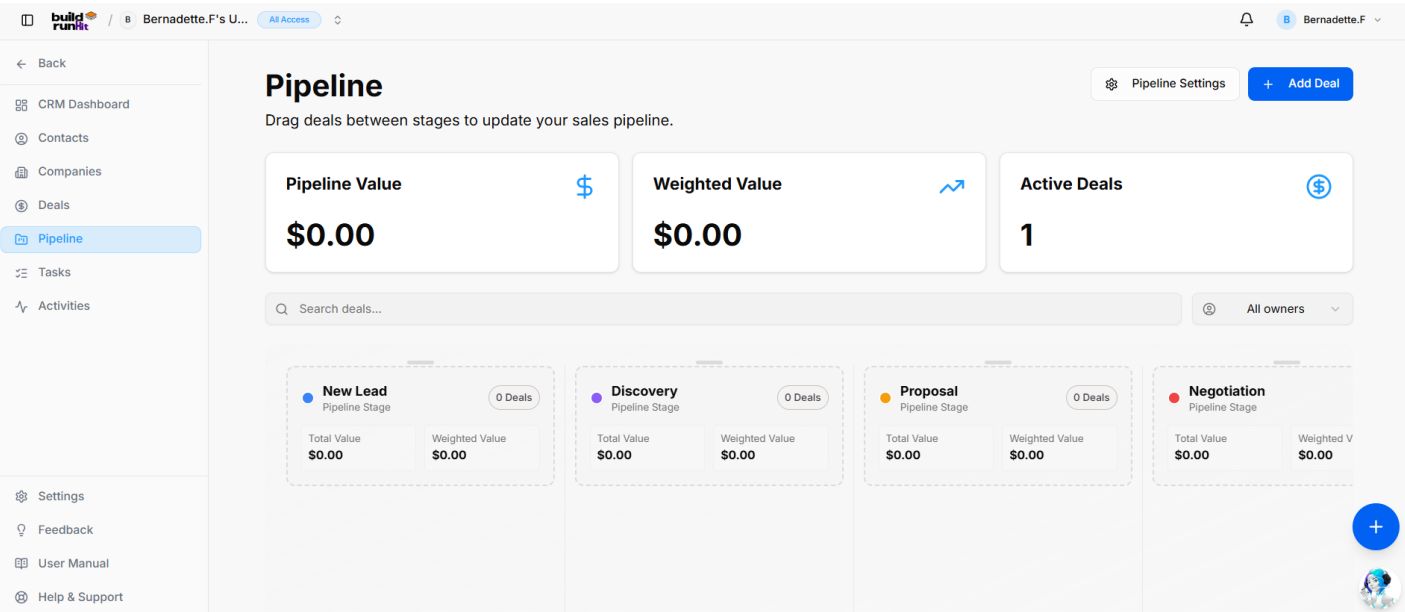


BuildRunKit CRM: Pipeline Sub-Section

BuildRunKit CRM: Pipeline Sub-Section



The **Pipeline** sub-section offers a Kanban-style view of your sales process, allowing you to drag and drop deals across custom stages while monitoring stage-by-stage valuations.

Header & Action Buttons

- **Pipeline Settings:** Access stage configurations to customize, add, or reorder pipeline stages.
- **+ Add Deal:** Direct action button to open the deal creation modal.

Pipeline Metrics Cards

- **Pipeline Value:** Total unweighted financial value across all active pipeline stages.
- **Weighted Value:** Cumulative projected value calculated using probability percentages.

- **Active Deals:** Count of open opportunities currently moving through the pipeline.

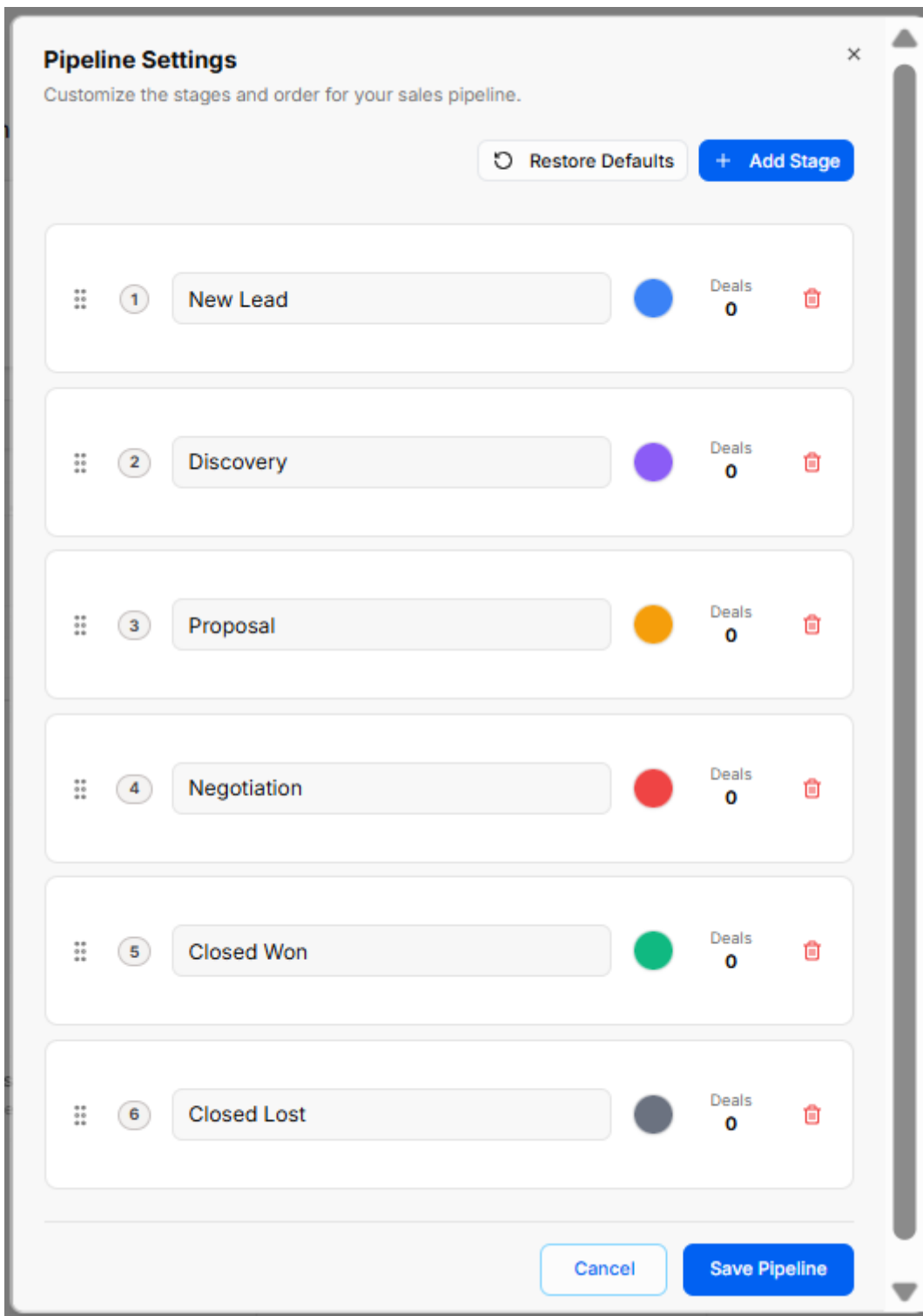
View Controls & Search

- **Search deals...:** Global text input to locate deal cards by title or contact.
- **All owners Dropdown:** Filter active stage columns by assigned team member.

Pipeline Stages (Kanban Columns) Each column summarizes stage metrics (*Total Value*, *Weighted Value*, and deal count) and supports drag-and-drop deal movement across stages:

- **New Lead:** Initial entry point for incoming prospects.
- **Discovery:** Stage for qualifying lead requirements and budget fit.
- **Proposal:** Quote or formal proposal delivered to the prospect.
- **Negotiation:** Active contract or scope terms evaluation.
- **Closed Won:** Final stage for successfully closed opportunities.
- **Closed Lost:** Archive stage for deals that did not convert.

BuildRunKit CRM: Pipeline Settings Modal



Clicking the **Pipeline Settings** button opens a configuration modal that allows you to customize the stages and order for your sales pipeline:

- **Restore Defaults:** Resets the pipeline stages, sequence order, and color coding back to the system default configuration.
- **+ Add Stage:** Adds a new customizable stage row to your sales process.
- **Stage Controls & Ordering:**
 - **Drag Handle (::):** Click and drag to reorder stage sequence numbers.

- **Sequence Indicator:** Displays the numerical order of each stage (1 through 6).
 - **Stage Name Input:** Editable text field to customize stage labels (e.g., *New Lead*, *Discovery*, *Proposal*, *Negotiation*, *Closed Won*, *Closed Lost*).
 - **Color Picker Circle:** Assigns distinct visual color indicators to each stage for quick Kanban identification.
 - **Deals Counter:** Displays the total count of active deals currently assigned to that stage.
 - **Trash Bin Icon:** Deletes individual stages from the pipeline.
 - **Modal Actions:** Click **Cancel** to discard changes or **Save Pipeline** to apply the updated stage configuration.
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