Goldilocks CRM: Sales Pipeline

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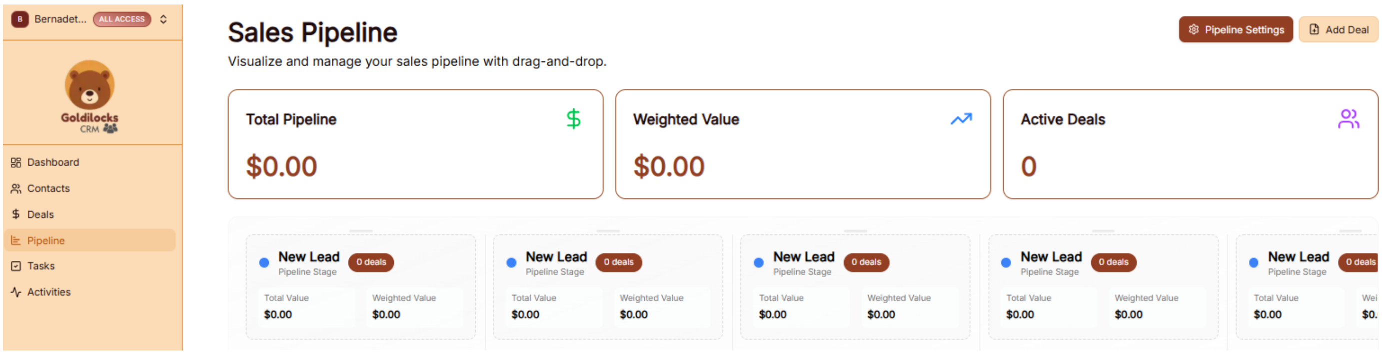
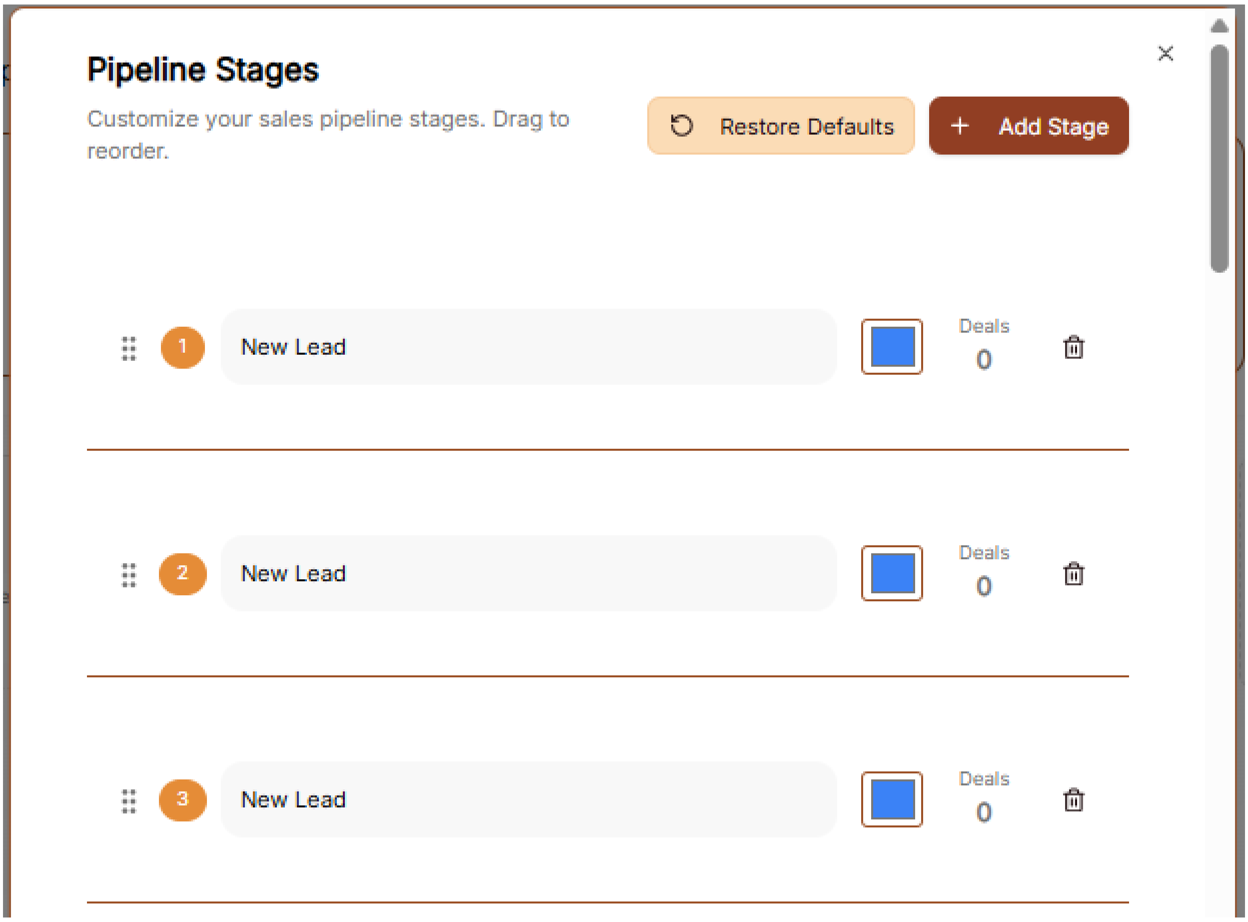


Pipeline Dashboard

The Pipeline page allows you to visualize and manage your sales flow with drag-and-drop. This board provides a real-time overview of your business health through high-level metrics:

- Total Pipeline: Displays the total financial value of all deals currently in the board.
- Weighted Value: Shows the adjusted value of your pipeline based on the probability of deals closing.
- Active Deals: The total count of open opportunities currently being tracked.

Customizing Your Pipeline



To modify how your sales process is organized, use the Pipeline Settings link located at the top of the board.

Managing Pipeline Stages:

- Pipeline Settings: Click this link to access the customization area where you can add or change the stages of your sales cycle.
- Customize Stages: Within the settings, you can adjust your pipeline to fit your specific business needs, such as renaming columns or reordering your workflow.
- Stage Columns: By default, your deals are organized into stages including New Lead, Discovery, Proposal, and Negotiation.
- Stage Totals: Each stage header shows the number of deals in that specific phase and their combined value.

Managing Deals

- Add Deal: Click the brown + Add Deal button at the top right of the dashboard to immediately create a new opportunity within the selected pipeline.
- Deal Tracking: Individual cards on the board show the Deal Name, Customer, and the Total Amount for quick reference.

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