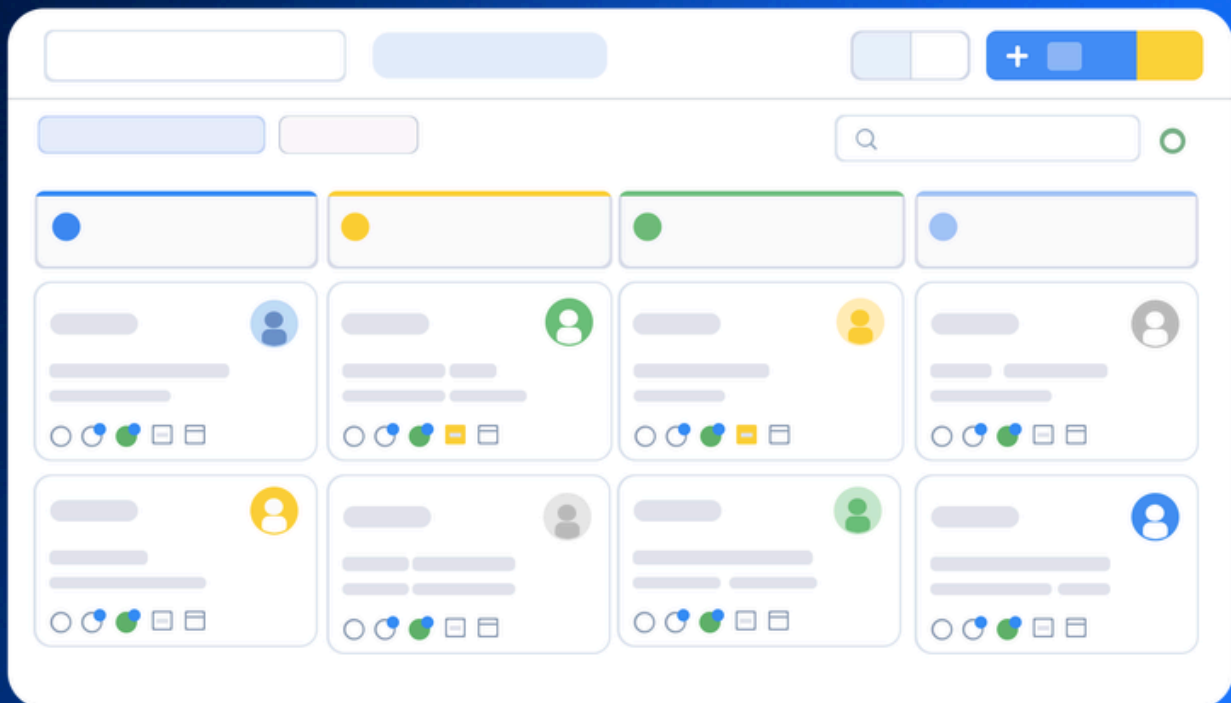


REFERENCE GUIDE

Opportunities & Pipelines

Track Every Deal From Start to Won



Pipelines, Stages & the Board

What It Is

A pipeline is a set of stages for one kind of deal. Each stage is a column on the board, and each deal is a card that moves right as it gets closer to a yes.

How It Works For Your Business

- Search for Opportunities to land on the board, with a pipeline picker at the top.
- Each stage column shows a total of deals and dollars, so you can see where money sits.
- Three pages to know: Opportunities (daily work), Pipelines (setup), and Forecast (estimates).
- Search for Pipelines, click Create new pipeline, name it, and add stages with Add stage.
- Use the arrows to reorder stages, then Save. The trash icon asks where a stage's deals should go.

Pipelines, Stages & the Board – Tips & Guidelines

Tips

- Pipeline and stage names must be unique, so pick short names you will recognize.
- Won and Lost stages are created for you, so only build your working stages.
- The funnel and pie chart icons choose whether a stage shows in those dashboard charts.
- Three to six stages is plenty to start. You can add more later.

DO

- Name stages in your own words
- Give each deal path its own pipeline
- Keep stage names short
- Pick a destination when deleting

DON'T

- Build fifteen stages on day one
- Reuse a pipeline name
- Rebuild Won and Lost
- Skip the Save button

Adding Opportunity Cards

What It Is

An opportunity is one deal. Its card holds the contact, a value, a stage, a status, and an owner, so nothing about the deal lives only in your head.

How It Works For Your Business

- Click Add opportunity at the top right of the board and a form slides open.
- Pick the Primary Contact, type an Opportunity Name, then choose the pipeline and starting stage.
- Set the status to Open for a new deal and type your best estimate in Opportunity Value.
- Pick an Owner, add one or more Followers, and fill in Source, Tags, or Business Name if useful.
- Click Create, then drag the card to the next stage when the deal moves.

Adding Opportunity Cards – Tips & Guidelines

Tips

- Use a name like Smith Co - Website Redesign so the who and what show at a glance.
- Enter an honest estimate. Cards with no value do not add to stage totals.
- Use Source and Tags so you can filter by them later.
- Drag a card to change its stage fast. Open it only when you need to edit details.

DO

- Tie every deal to a real contact
- Enter a best-guess value
- Name cards the same way
- Set an owner on every card

DON'T

- Leave the value blank
- Keep deals on sticky notes
- Make every name different
- Drop cards outside a column

Editing Details & Status

What It Is

Click any card to open its details panel. You can update value, owner, stage, contact info, and custom fields, and set the deal's status.

How It Works For Your Business

- Click a card from board or list view to open the same details panel.
- Change the value, owner, or stage, save, and the board updates to match.
- Status is Open, Won, Lost, or Abandoned. These four are fixed and cannot be renamed.
- Choosing Lost shows a Lost reason box. Fill it in so you can see why deals are lost later.
- Use the Notes, Tasks, and Appointment sections on the card. Each deal supports one appointment.

Editing Details & Status – Tips & Guidelines

Tips

- Update the card after every call so your totals stay honest.
- Finished deals left Open clog the board, so change the status when a deal ends.
- After a status change, the card leaves the default open view. Use the filter to see it.
- Create a task with a due date for every next step so follow-ups never slip.

DO

- Mark deals Won or Lost promptly
- Fill in the Lost reason
- Add a task for each next step
- Mark dead deals Abandoned

DON'T

- Leave finished deals Open
- Try to rename a status
- Skip the note after a call
- Ignore stale values

Board View, List View & Search

What It Is

Board view shows deals as cards in columns. List view shows the same deals as a sortable table. Search works in both, so you can jump to any deal fast.

How It Works For Your Business

- Use the view toggle near the top right to switch between Board and List.
- In Board view, drag cards between stages, click a header to collapse a column, or drag its edge to resize.
- In List view, use Sort and Customize Columns to choose what you see and in what order.
- Look for All Pipelines in the pipeline dropdown. It only works in List view.
- Type at least three letters in the search box. Search matches the start of words.

Board View, List View & Search – Tips & Guidelines

Tips

- Board layout choices save in your browser only, so another computer will look different.
- Sort by value in List view to see your biggest deals first.
- Search also finds deals by contact email, phone, company, or tag.
- Sorting by stage may not be supported, so sort by another field if needed.

DO

- Use Board to move deals
- Use List to scan and sort
- Hide columns you never use
- Search the start of a name

DON'T

- Keep fifteen columns on
- Expect layout on every device
- Search with two letters
- Type the middle of a name

Filtering, Sorting & Smart Lists

What It Is

Filters narrow your board or list to just the deals you need. A Smart List saves a set of filters so you can bring that view back with one click.

How It Works For Your Business

- Click the funnel-shaped filter icon to open the filter panel.
- Look for filters such as owner, status, stage, source, tags, dates, value range, and custom fields.
- Combine filters, and look for the option that sets how they combine, such as AND or OR.
- Sort by options such as value, date, or name to put the deals you want on top.
- Look for the option to save your filters as a Smart List, then reuse it later or switch pipelines.

Filtering, Sorting & Smart Lists – Tips & Guidelines

Tips

- Remember the default view shows only open deals, so change the status filter to see Won or Lost.
- Name each Smart List for the question it answers, such as Big deals this month.
- Clear your filters when a board looks emptier than it should.
- Smart List button names can differ, so look for the option labeled like a list or save.

DO

- Save filters you use weekly
- Name lists by the question
- Clear filters when done
- Combine filters on purpose

DON'T

- Forget the open-only default
- Name lists List 1
- Leave old filters on
- Rebuild filters every time

Cards, Colors & Custom Fields

What It Is

You can change how cards look and what they show. Stage colors, smart tags, and custom fields make a busy pipeline faster to read and fit the details your business tracks.

How It Works For Your Business

- Look for Manage Fields on the board to pick which fields show on each card, up to seven.
- Choose a card layout, such as Default, Compact, or Unlabeled, and apply it to one or all pipelines.
- Open a pipeline to look for stage color options and display styles like a dot or background tint.
- Look for smart tags to color-code pipelines, plus options to reorder or duplicate pipelines.
- Add custom fields from the opportunity form, then see them on cards, filters, and list columns.

Cards, Colors & Custom Fields – Tips & Guidelines

Tips

- Pick fields that help you decide what to do next, not every field you have.
- Exact menu names for colors and smart tags can differ, so look for the labeled option.
- Deleted pipelines and opportunities can often be restored. Look for a restore option.
- Conditional custom fields show or hide based on another field's value.

DO

- Show only the fields you use
- Color stages that need attention
- Name custom fields clearly
- Test a new field on one deal

DON'T

- Fill all seven slots
- Use colors with no meaning
- Delete without checking restore
- Create duplicate fields

Bulk Editing & CSV Import

What It Is

Bulk editing changes many opportunities at once. A CSV import brings in a spreadsheet of deals and matches its columns to fields like pipeline, stage, and value.

How It Works For Your Business

- Hover over a card to find its checkbox, then select the cards you want to change.
- Use the Select all option to pick every deal in view, then click the Edit button at the top.
- Bulk actions include reassigning the owner, changing pipeline and stage, and updating status.
- List view offers the same bulk editing for rows you select.
- Look for the import option and map each CSV column to the matching opportunity field.

Bulk Editing & CSV Import – Tips & Guidelines

Tips

- Filter first so Select all only grabs the deals you mean to change.
- Clean your CSV before importing, with one deal per row and clear headers.
- Match pipeline and stage names in the file to the names in your account.
- Import a small test file first to check the field mapping.

DO

- Filter before you select all
- Review the count before saving
- Clean the CSV first
- Test with a few rows

DON'T

- Select all on an unfiltered board
- Import without mapping
- Mix stage spellings
- Skip the test import

Workflows from Opportunities

What It Is

Opportunity changes can start automations. A workflow can run when a deal is created, moves stage, changes status, or sits too long, so follow-ups happen without you.

How It Works For Your Business

- In your workflow builder, look for the Opportunity Created, Pipeline Stage Changed, and Opportunity Status Changed triggers.
- Look for a Stale Opportunities trigger to act on deals that sit too long.
- Add pipeline and stage filters to a trigger so it only fires for the deals you choose.
- Look for the Create Opportunity and Remove Opportunity actions to add or clear cards automatically.
- Check the Allow Multiple Opportunities setting if one contact may need more than one deal.

Workflows from Opportunities – Tips & Guidelines

Tips

- Start with one trigger and one action, then test by moving a card on the board.
- Use stage filters so the workflow does not run on every pipeline.
- Confirm the workflow is published and on, or it will not run.
- Setting names can change, so look for the option labeled like multiple opportunities.

DO

- Test by moving one card
- Filter triggers by stage
- Keep workflows simple
- Check the workflow history

DON'T

- Leave a workflow unpublished
- Trigger on every pipeline
- Stack many actions at once
- Skip testing

Permissions & the Forecast Tab

What It Is

Permissions control who can see or change each pipeline. Forecast estimates how much revenue may close, based on the deals and values on your board.

How It Works For Your Business

- Look for the key icon next to a pipeline to manage who can use it.
- Share with all users, selected users, or exclude people, and choose view only, edit, or no access.
- Look for a permissions audit log to see recent changes to who has access.
- Search for Labs to turn on Forecast if hidden, then search for Forecast.
- Forecast shows maximum potential, expected (weighted), and won revenue by week, month, or quarter.

Permissions & the Forecast Tab – Tips & Guidelines

Tips

- Filter the forecast by pipeline, owner, and date range, then open deals behind a number.
- Look for flags on deals missing a value, a close date, or that have gone stale.
- Forecast is only as good as your cards, so keep values and dates current.
- Forecast may not appear on every account yet, so check what you see on screen.

DO

- Give each person the access they need
- Fix flagged deals first
- Keep values and dates current
- Review permissions now and then

DON'T

- Give everyone edit access
- Trust a forecast with blank values
- Ignore stale flags
- Assume Forecast is on

Key Terms Glossary

Pipeline

A set of stages for one kind of deal.

Stage

One column on the board. Deals move through stages.

Opportunity

One deal, shown as a card on the board.

Status

Open, Won, Lost, or Abandoned. These four are fixed.

Lost reason

A note on why a deal was marked Lost.

Owner

The person responsible for running a deal.

Follower

A teammate who stays in the loop on a deal.

Kanban board

Board view with deals as cards in stage columns.

Smart List

A saved set of filters you can reuse.

Custom field

A field you add to track details unique to your business.

Bulk edit

Changing many opportunities at once.

Forecast

A page that estimates revenue that may close.

Getting Help

Your software changes over time, so buttons and menus may move or get new names. If something looks different from this guide, check the in-app help for Opportunities and Pipelines. Look for the same labels in the same area first.