Pipeline

The Pipeline page gives ACME Creative Agency a visual overview of every open opportunity — from first inquiry through to won deal — organized as a Kanban board with stages you control.

Key Features

- **Kanban Board**: Leads organized in columns by stage, each showing lead count and total value
- **Drag & Drop**: Move a lead to a new stage by dragging its card — saves automatically
- **List View**: Switch to a compact table showing name, contact, source, value, age, event date, and temperature
- **Summary Stats**: Four cards show Pipeline Value, Active Leads, Won This Month, and Win Rate (last 90 days). Click a card to focus the board on that segment; click again to clear
- **Toolbar Total**: A running total reflects the estimated value of all currently visible leads
- **Quick Add Lead**: Click **New Lead** — first name is required, everything else is optional. Lead name is auto-generated if left blank
- **Company Detection**: Enter an email and the system automatically checks if the domain matches an existing account and offers to link the lead

- **Temperature & Age**: Each card shows a colored dot (hot, warm, cold) and a color-coded age badge — green for new leads, red for 30+ days
- **Lead Editor**: Click any card to open a detail panel. Edit name, contact info, event date, notes, stage, value, temperature, and source, then click **Save**
- **Mark Won / Mark Lost**: Trophy and X buttons appear on cards and in the editor. Marking Won automatically upgrades the linked account from prospect to client
- **Log Contact**: Record a call, email, meeting, SMS, or follow-up with optional notes — a badge tracks the total count per lead
- **Convert to Project**: Click **New Project** in the editor (or respond to the automatic prompt) to choose a project type — Event, Production, Rental, Service, and more — and create it immediately
- **Project Detail (Inline)**: Once a project is linked, a badge appears on the card. Click it — or **Open Project** in the editor — to open a full multi-tab view: Events, Quotes, Contracts, Invoices, Resources, Budget, People, and Activity. Manage the entire engagement without leaving the pipeline
- **Filters & Search**: Narrow by source or temperature; search by lead or account name
- **Custom Stages**: Click the gear icon to add, rename, reorder, and color-code stages. Set one as **Default** (where new leads land), one as **Won**, and optionally flag stages to auto-trigger project creation

How to Use

1. Open **Pipeline** from the sidebar to see your board
2. Check the four summary cards for a quick health snapshot — click one to focus on that segment
3. Click **New Lead** to add an opportunity; enter an email to auto-detect the linked account
4. Drag a card to move it through stages, or open the editor and pick a new stage from the dropdown
5. Click any card to edit details, log a contact attempt, or mark it won or lost
6. When a lead is ready, click **New Project** to convert it — choose a project type and create it immediately
7. Use the project badge on the card or **Open Project** in the editor to manage quotes, invoices, and contracts right here
8. Click the **gear icon** to manage stages — add new ones, set colors, and configure auto-project triggers

Tips

- **Pipeline Value** only counts active leads, so it always reflects real open opportunities
- **Win Rate** covers the last 90 days — the most actionable window for spotting trends
- **Age badges** turn red at 30+ days — a quick signal for leads that need follow-up
- Set a **Default** stage so every new lead lands in the right column automatically
- Stages with active leads must have those leads reassigned before the stage can be deleted
- The full quote → contract → invoice workflow lives inside the project detail — win the lead, then run the engagement without switching pages