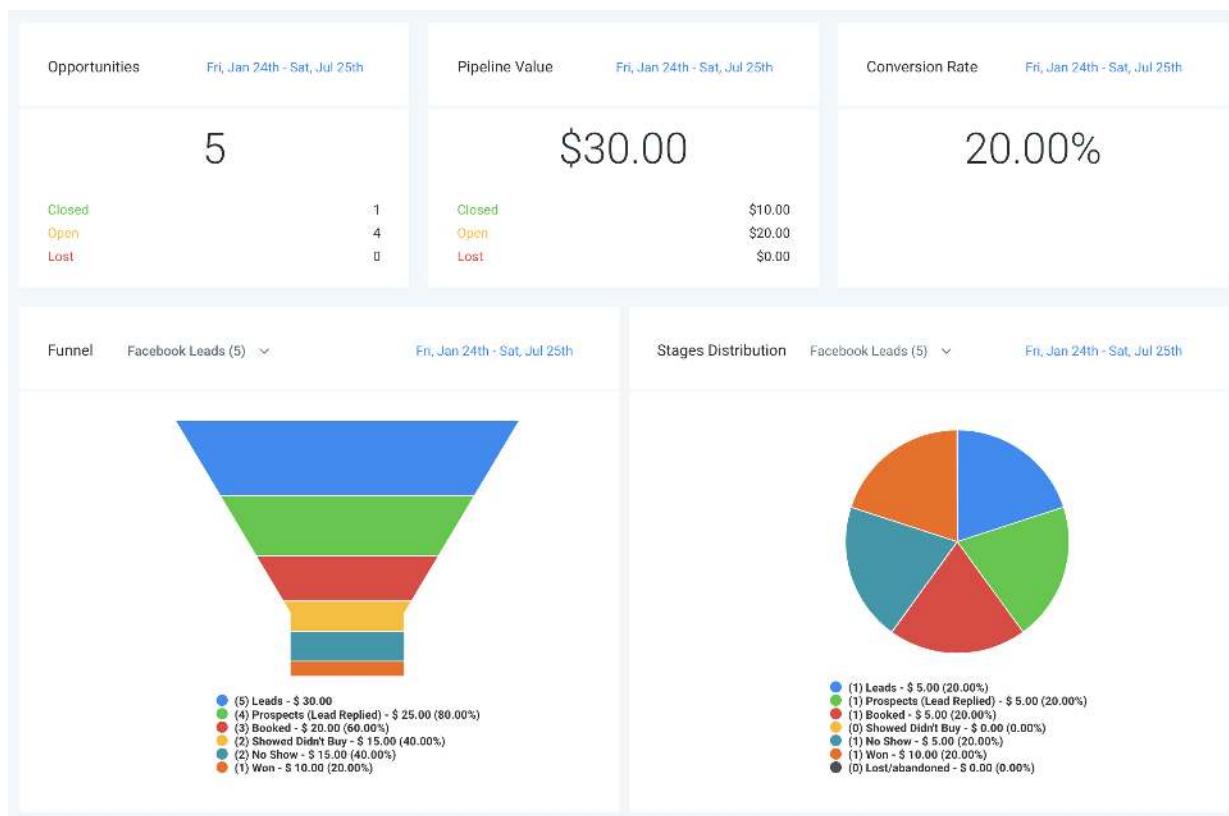


CTTK

Dashboard: Opportunities, Pipeline
Value, Conversion Rate, Funnel, Stages
Distribution



Dashboard: Opportunities, Pipeline Value, Conversion Rate, Funnel, Stages Distribution



Opportunities

Fri, Jan 24th - Sat, Jul 25th

5

Closed

1

Open

4

Lost

0

Dashboard: Opportunities, Pipeline Value, Conversion Rate, Funnel, Stages Distribution

The Date Range filter is based on the Date Created of the leads.

So the opportunities view above shows the 4 leads who opt-in to HL from Jan 24th to Jul 25th are in OPEN status.

Fri, Jul 24th - Fri, Jul 24thPipeline Value

2020
Jul 24, 2020 - Jul 24, 2020

This week←July 2020→

Last weekSunMonTueWedThuFriSat

Last 7 days1234

Last 30 days567891011

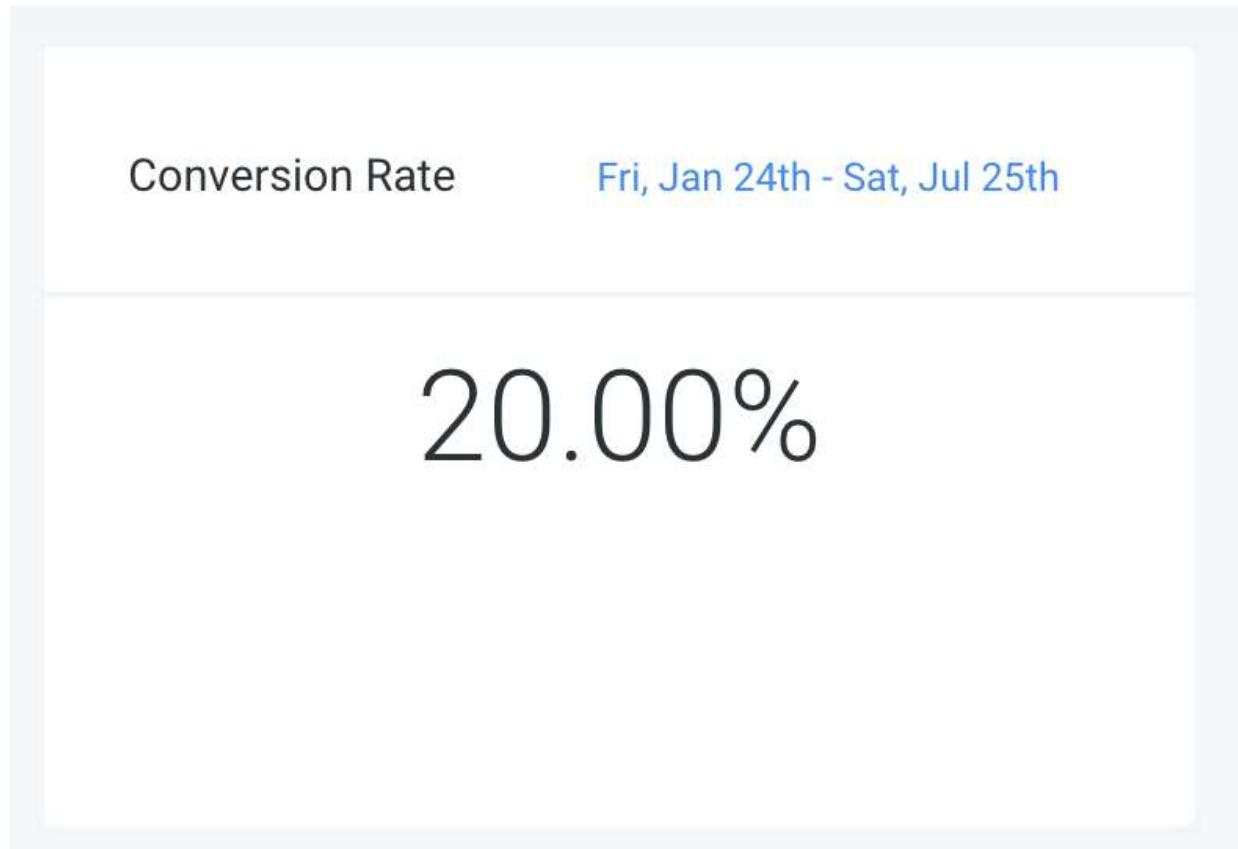
This month12131415161718

Last month19202122232425

This year262728293031

Last year

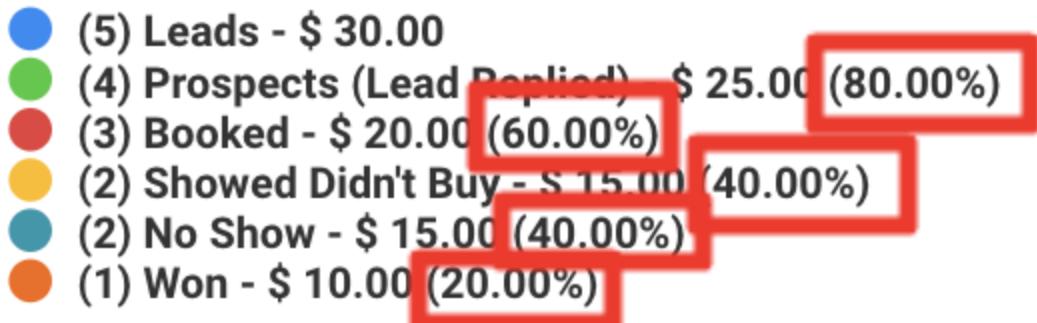
If you only want to see the number of leads who opt-in on a certain day, you could double-click the date you want!



Conversion rate = the number of leads in the WON status (1) divided by all the leads opt-in (5)

- (5) Leads - \$ 30.00
- (4) Prospects (Lead Replied) - \$ 25.00 (80.00%)
- (3) Booked - \$ 20.00 (60.00%)
- (2) Showed Didn't Buy - \$ 15.00 (40.00%)
- (2) No Show - \$ 15.00 (40.00%)
- (1) Won - \$ 10.00 (20.00%)

The WON at the end of the list is added automatically here. So you don't need to create a WON stage to keep track of leads who are in the status of WON.



The percentage on the right for the Prospects stage means that 80% of the leads who joined the Facebook Leads pipeline will move forward to the Prospects stage.

60% of the leads who joined the Facebook Leads pipeline will move forward to the Booked stage.

The way we build our pipeline is like a sales stage. E.g. If we have a pipeline for stages like Elementary school, High school, University. If the person is in the University stage, we will increase the number of leads in the stage for Elementary and High school by 1 because we assume that the person has been to those stages.

So if you like to track the leads who are in the NO SHOW stage, it doesn't make sense to refer to the Funnel chart because that would mean that 40% of the leads who joined the Facebook Leads pipeline will move forward to the NO SHOW stage. In fact, it should be 20% instead of 40% because only 1 lead is no show. The other lead is marked as WON. When the lead is marked as WON, the number of leads on all stages will be increased by 1 because we assume the lead went through all the steps to purchase the product.

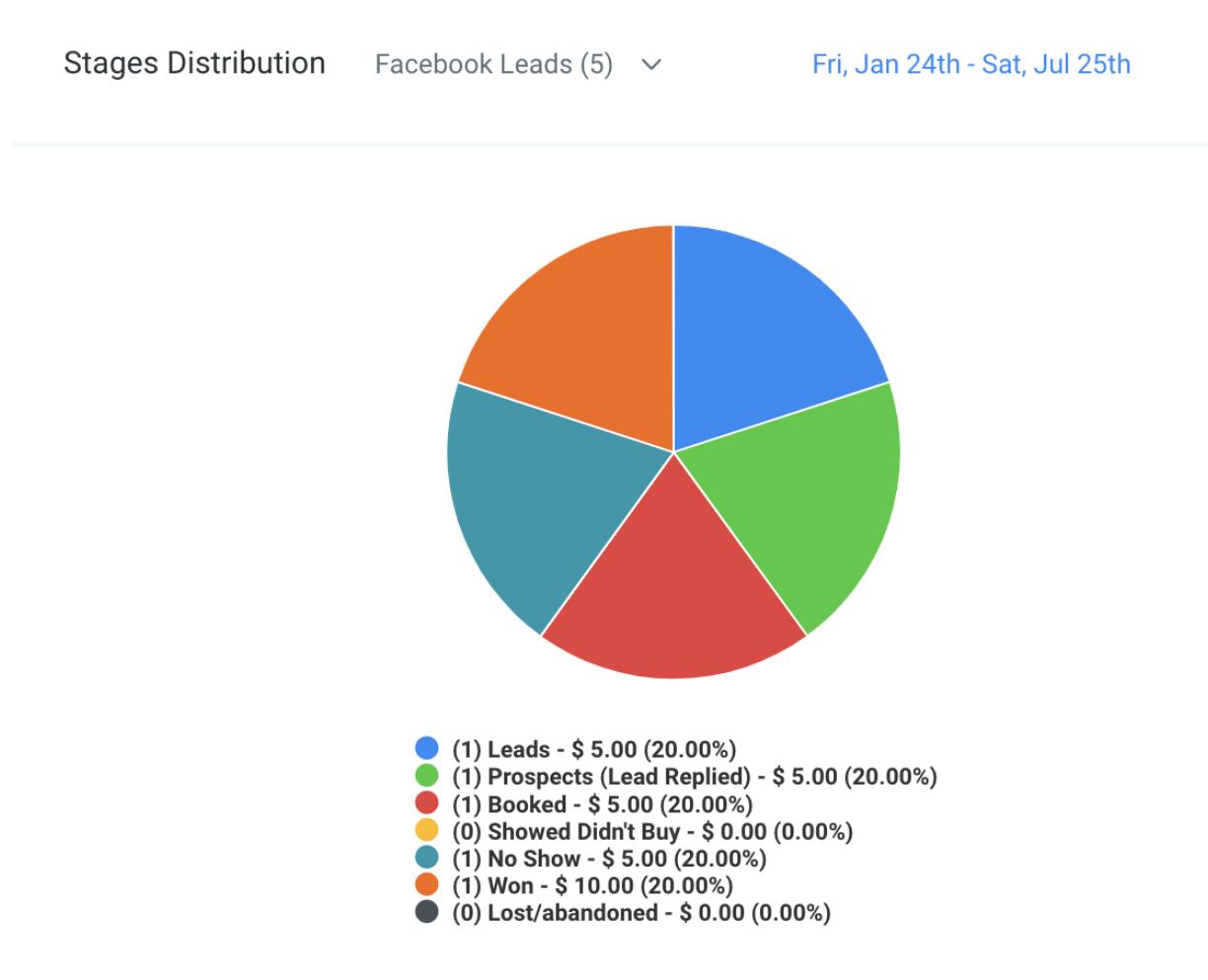
If you want to refer to the Funnel chart, each pipeline stage should be one step closer to sale, like Prospect -> Survey submitted -> Consultation -> Purchase

More info to creating a pipeline:

<https://gohighlevelassist.freshdesk.com/support/solutions/articles/48000982197-create-a-pipeline>

Dashboard: Opportunities, Pipeline Value, Conversion Rate, Funnel, Stages Distribution

If you want to keep track of stage like No-shows, showed didn't buy, you could refer to the Stages Distribution chart.



The chart above simply shows the number of leads who are currently in which stages.

If you want to track how many leads have been to which stages, you could Allow Duplicate Opportunity so if the lead has been to the No show stage, it will leave an opportunity card there.

Dashboard: Opportunities, Pipeline Value, Conversion Rate, Funnel, Stages Distribution

The screenshot shows the CRM's settings interface for a company named 'Test'. The sidebar on the left has a 'Settings' button highlighted with a red box and an arrow. The main content area has a 'Company' tab highlighted with a red box and an arrow. The 'General' section at the bottom contains several checkboxes. The 'Allow Duplicate Opportunity' checkbox is checked and highlighted with a red box and an arrow. The text below it reads: 'Make sure that the trigger action Add/Update Opportunity also has Allow duplicate opportunities toggle on.'

Test - Test, AK

Check In Client

Dashboard

Conversations

Opportunities

Marketing

Reporting

Scheduling

Calendar

Appointments

Reputation

Reviews

Review Requests

Contacts

Funnels and Websites

Triggers

Support Portal

Settings

Company

Team Management

Email

SMS

Customize Communication

Review Widget

Appointment Widget

Pipelines

Integrations

Phone Numbers

Cal

Custom Fields

Facebook Form Fields Mapping

Custom Values

Domains

Tags

SMTP and MailGun Service

Company Data

Company Logo

The proposed size is 350px * 180px
no bigger than 2.5mb

Change Remove

Company Name

Test

Company Email

Company Email

Company Phone

+1 778-889-8267

Company Website

Company Website

API Key

579ea3cd-cc28-47a3-9adc-4a4d7e78fcce

Update Company

General

Allow Duplicate Contact

Allow Duplicate Opportunity

Merge Facebook Contacts By Name

Disable Contact Timezone

Address

Test

City

Test

State / Prov / Region

Alaska

Country

United States

Time Zone

Update Address

Make sure that the trigger action Add/Update Opportunity also has Allow duplicate opportunities toggle on.

What action should we perform?

The Marketing Add / Update Opportunity

Marketing Audit Leads

New Leads

Opportunity Name

Opportunity Source

Lead value

Select status

Allow opportunity to move to previous stage in pipeline

Allow duplicate opportunities ?

This allows the system to create multiple opportunities for the same contact on the same