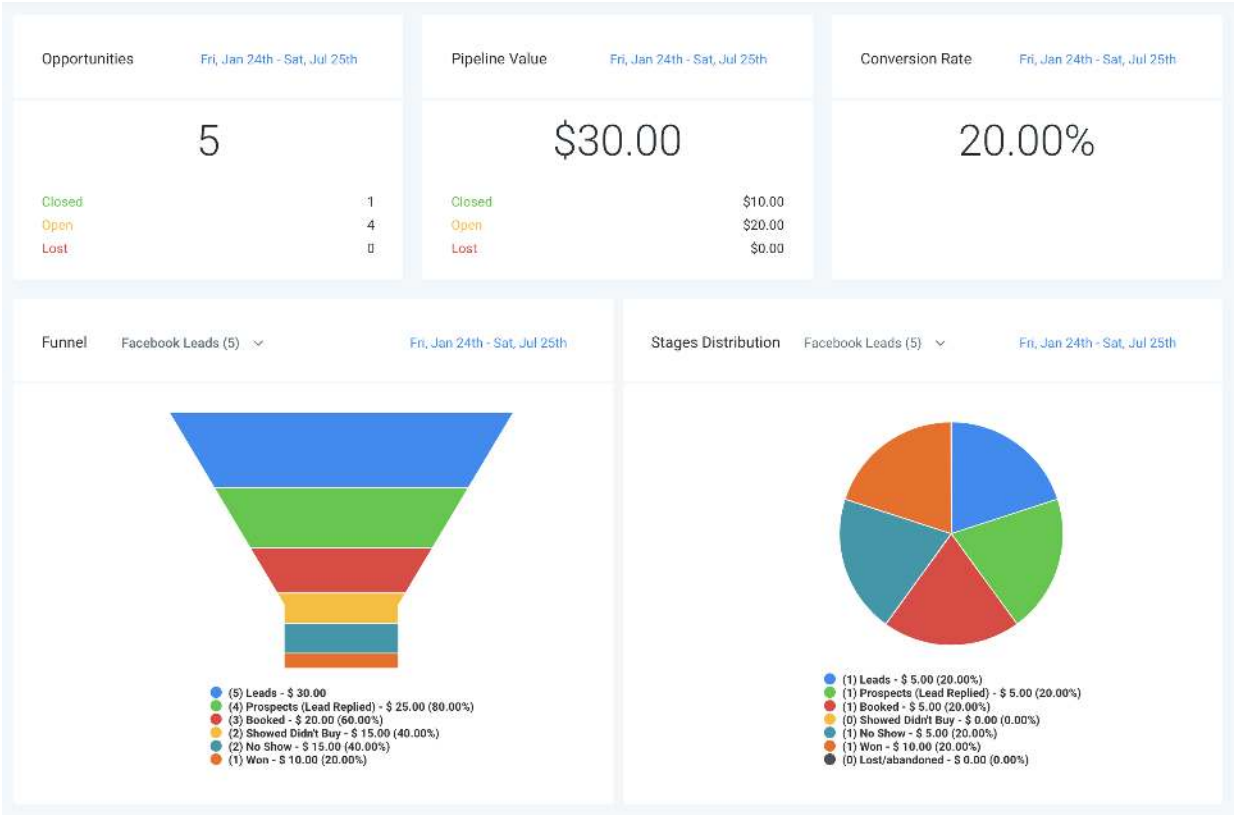


CITK

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 24th

Pipeline Value

2020

Jul 24, 2020 - Jul 24, 2020

This week

Last week

Last 7 days

Last 30 days

This month

Last month

This year

Last year

←

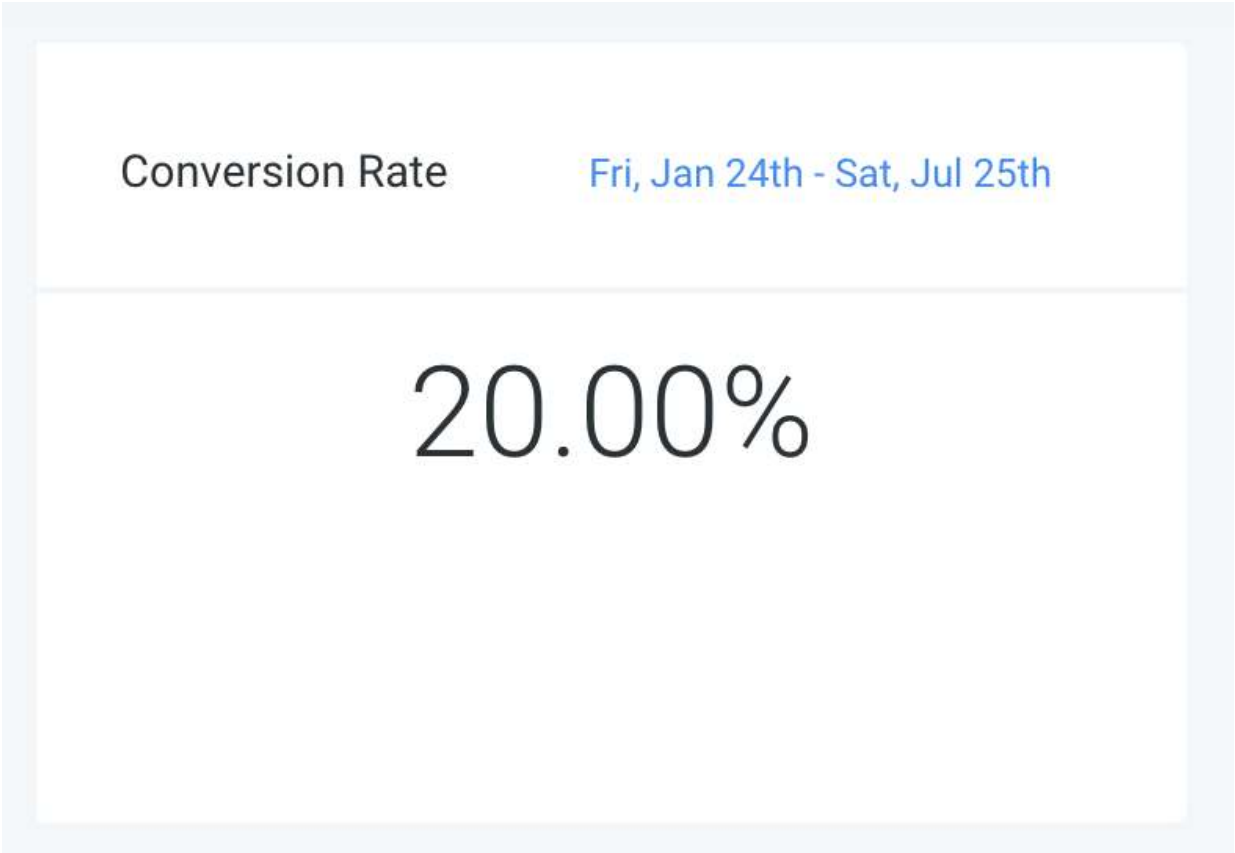
July 2020

→

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

✓

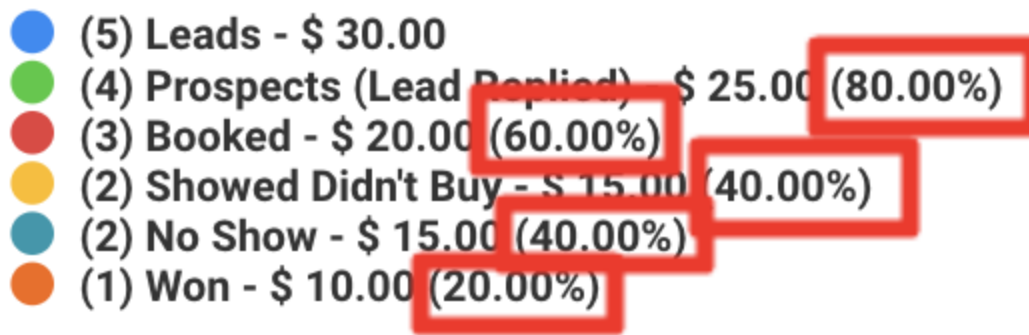
If you only want to see the number of leads who opt-in on a certain day, you could double-click the date you want!



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.

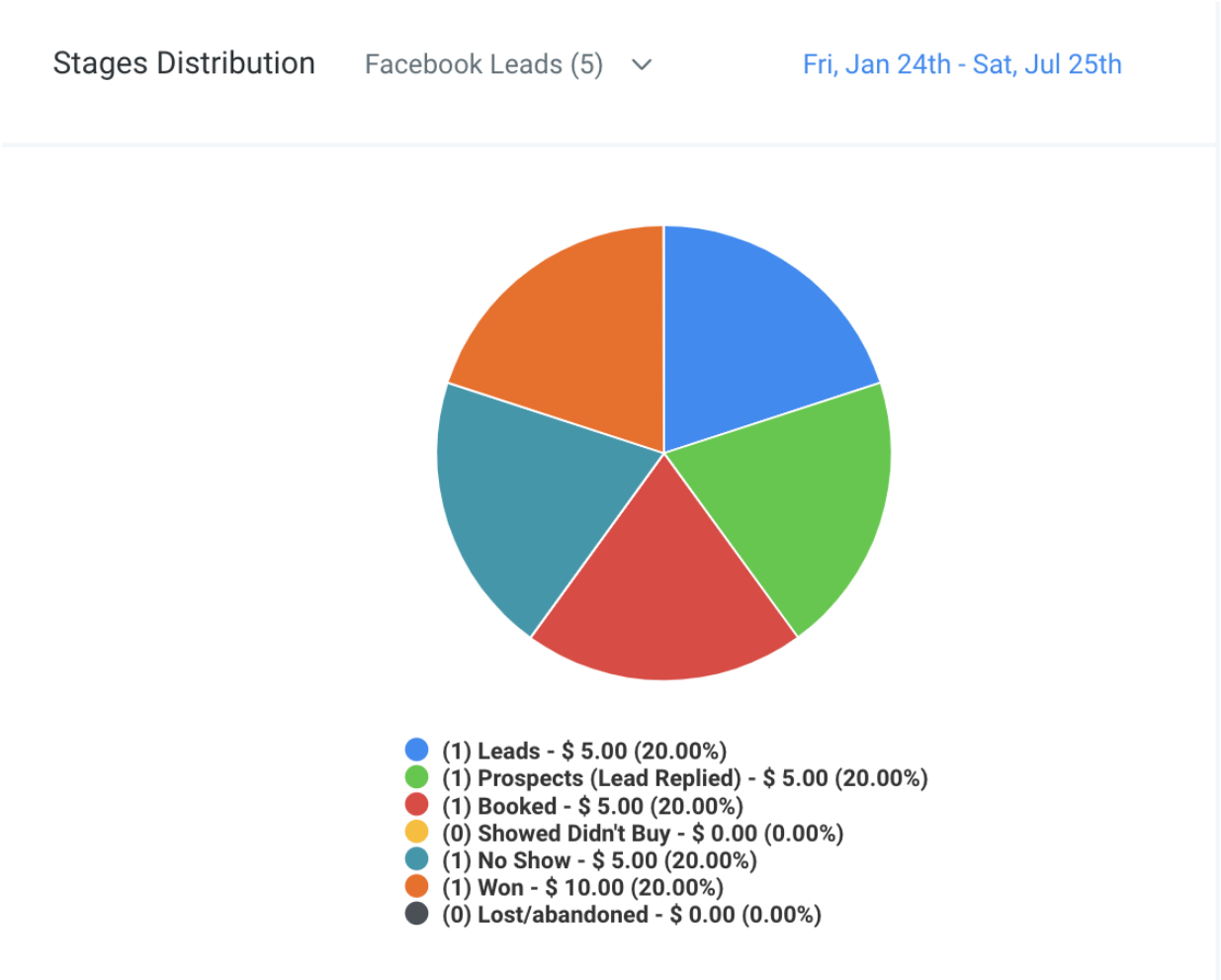
So if you like to track the leads who are in the NO SHOW stage, it doesn't make sense to refer to the Funnel chart because that would mean that 40% of the leads who joined the Facebook Leads pipeline will move forward to the NO SHOW stage. In fact, it should be 20% instead of 40% because only 1 lead 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>

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 'Settings' page for a CRM system. The left sidebar contains a navigation menu with items like Dashboard, Conversations, Opportunities, Marketing, Reporting, Scheduling, Calendar, Appointments, Reputation, Reviews, Review Requests, Contacts, Funnels and Websites, Triggers, and Support Portal. The 'Settings' item is highlighted with a red box. The main content area is titled 'Settings' and has a sub-tab 'Company' selected, also highlighted with a red box. The 'Company' tab has a sub-menu with 'Custom Fields', 'Facebook Form Fields Mapping', 'Custom Values', 'Domains', 'Tags', and 'SMTP and MailGun Service'. The 'Company Data' section includes fields for Company Logo, Company Name, Company Email, Company Phone, and Company Website. The 'Company Address' section includes fields for Address, City, State / Prov / Region, Country, and Time Zone. The 'General' section at the bottom has a red box around the 'Allow Duplicate Opportunity' toggle, which is checked. Other toggles include 'Allow Duplicate Contact', 'Merge Facebook Contacts By Name', and 'Disable Contact Timezone'. A red arrow points from the 'Settings' tab in the sidebar to the 'Company' sub-tab, and another red arrow points from the 'Company' sub-tab to the 'Allow Duplicate Opportunity' toggle.

Test - Test, AK

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-4a4d7e78fcoe

Update Company

Company Address

Address

Test

City

Test

State / Prov / Region ^

Alaska

Country

United States

Time Zone

Update Address

General

☐ Allow Duplicate Contact

☒ Allow Duplicate Opportunity

☐ Merge Facebook Contacts By Name

☐ Disable Contact Timezone

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 ?