

# CITK

## Step-by-Step Guide: Creating Pipelines

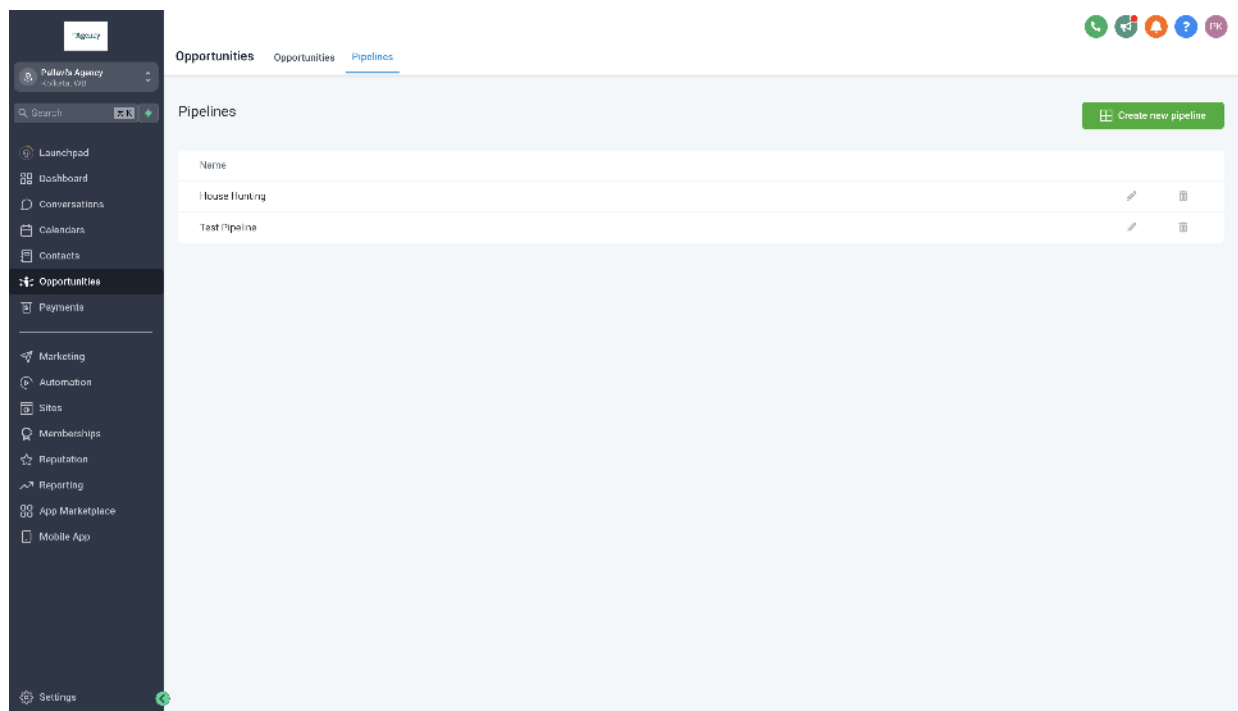


# Step-by-Step Guide: Creating Pipelines

Pipelines play a crucial role in automating and streamlining business processes in GoHighLevel. Whether you're managing leads, nurturing prospects, or closing deals, creating pipelines can significantly enhance your efficiency and effectiveness. In this step-by-step guide, we'll walk you through the process of creating pipelines in GoHighLevel.

## This feature is only available for Agency Admins and Sub-account Admins

### Step 1: Accessing the Pipelines Section

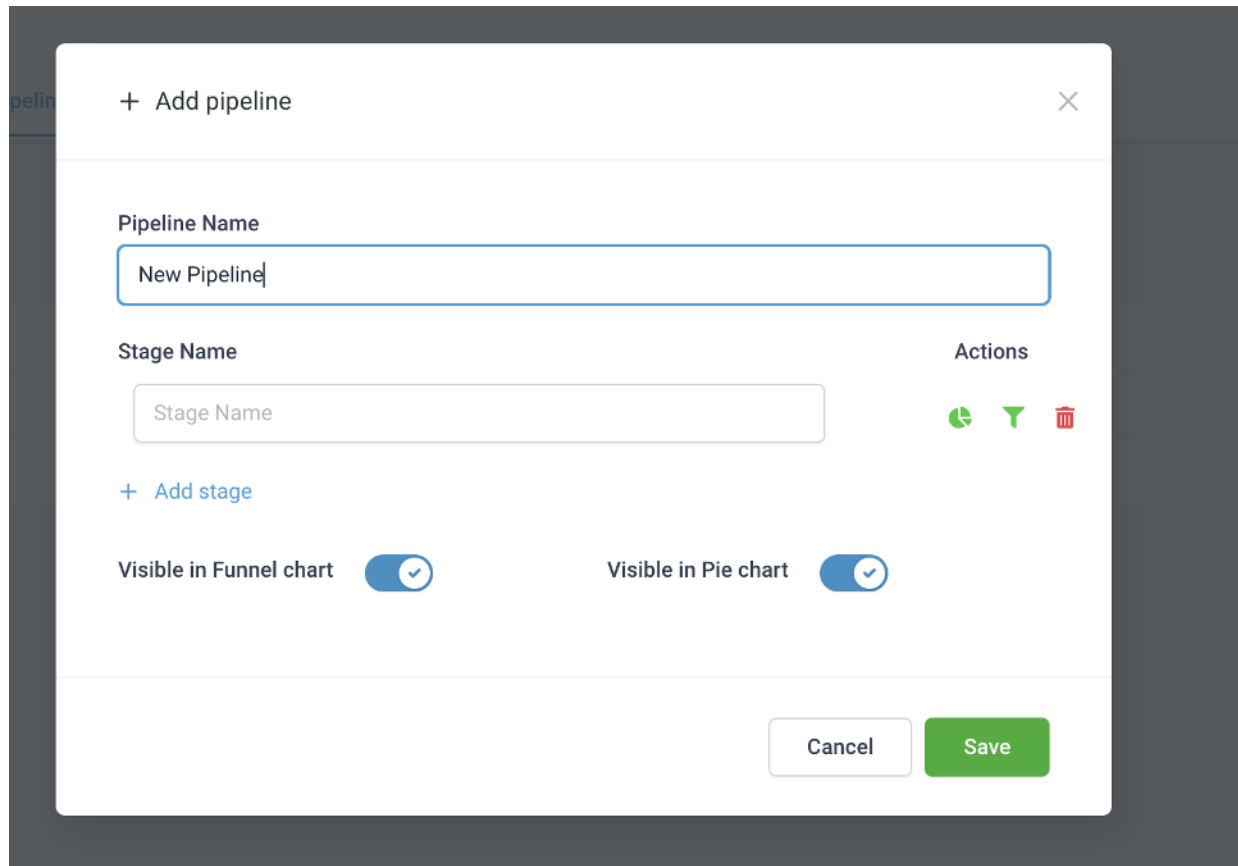


- Go to your Subaccount
- Go to Opportunities from the left sidebar
- Select Pipelines from the top menu
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### Step 2: Creating a new Pipeline

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- Once you're in the Pipelines section, click on the "Create Pipeline" button.
- Give your pipeline a descriptive name that reflects its purpose or the stage of the customer journey it represents.



The screenshot shows a modal window titled '+ Add pipeline' with a close button (X) in the top right corner. The form contains the following elements:

- Pipeline Name:** A text input field with the placeholder text 'New Pipeline'.
- Stage Name:** A text input field with the placeholder text 'Stage Name'.
- Actions:** Three icons: a green pie chart, a green funnel, and a red trash can.
- + Add stage:** A blue link to add a new stage.
- Visible in Funnel chart:** A toggle switch that is currently turned on (blue with a white checkmark).
- Visible in Pie chart:** A toggle switch that is currently turned on (blue with a white checkmark).
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

**Pipeline names always need to be unique and adding or updating another pipeline with an identical name is not allowed.**

### Step 3: Adding Stages to Your Pipeline

## Step-by-Step Guide: Creating Pipelines

+ Add pipeline

Pipeline Name

New Pipeline

Stage Name




Introduction




Initial Meeting




Presentation




Closure Meeting

Actions

+ Add stage

Visible in Funnel chart ☒

Visible in Pie chart ☒

Cancel

Save

- With your new pipeline created, you'll see an empty canvas where you can add stages.
- Enter the name of the first stage of your pipeline
- Click on the "Add Stage" button to create more stages
- Repeat this process to add additional stages, defining the sequential flow of your pipeline.
- You can also reorder the different pipeline stages using the up and down arrows on the left of the stage name.
- Note that you need not create stages for "Won" or "Lost". HighLevel creates those stages for every pipeline of yours by default.

Stage names always need to be unique and adding or updating another stage with an identical name is not allowed.

### Step 4: Pipeline Actions and Dashboard configuration

- The funnel and pie chart options allow you to decide whether the pipeline should be shown in the dashboard or not
  - You can also configure whether or not to show each stage in the dashboard funnel and pie charts by clicking on their icons at the right of the respective stage.
  - **Learn more about dashboards for opportunities [here](#).**
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