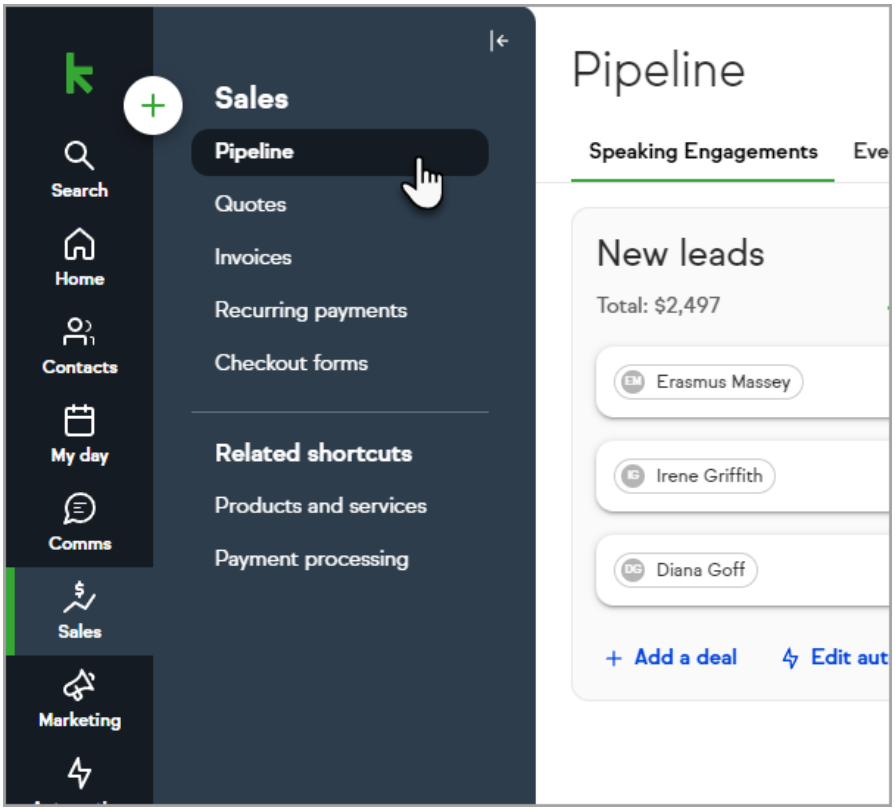
Pipeline: Multiple Pipelines

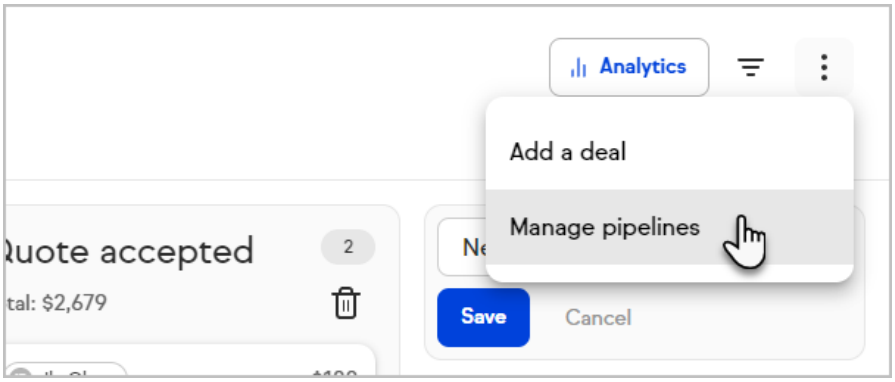
This article applies to:

Create a new pipeline

1. Start by going to **Sales** > **Pipeline**

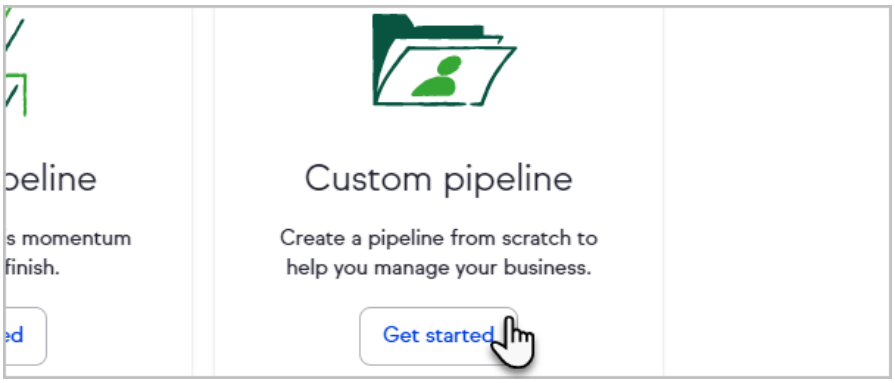


2. Click the ellipses and choose **Manage pipelines**

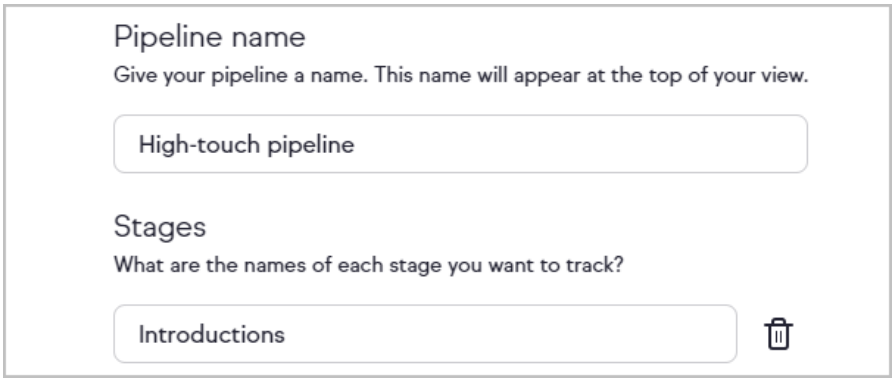


3. Click **Add a new pipeline**

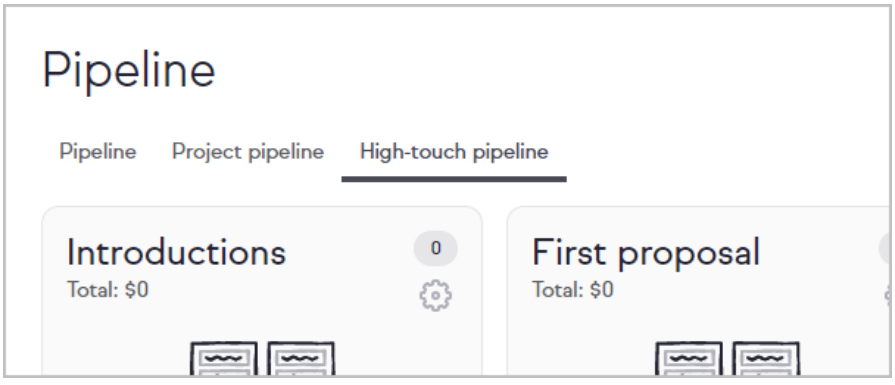
4. Decided if you want to use a template or create a custom pipeline and click **Get started**



5. Give your pipeline a name and customize the names and number of stages within the pipeline

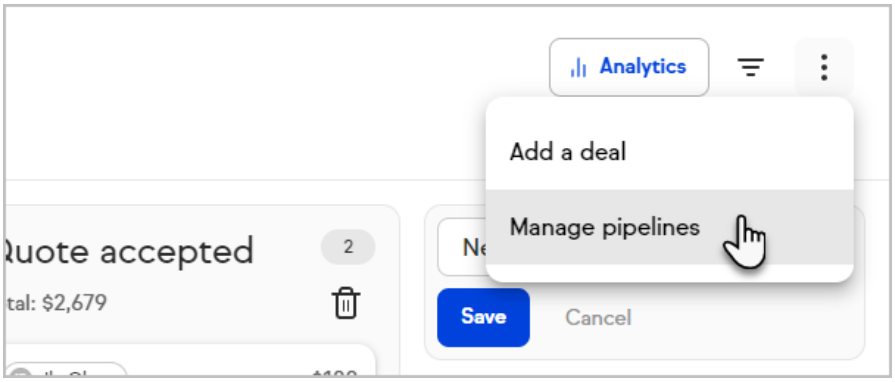


6. Click **Save** and your new pipeline will be created

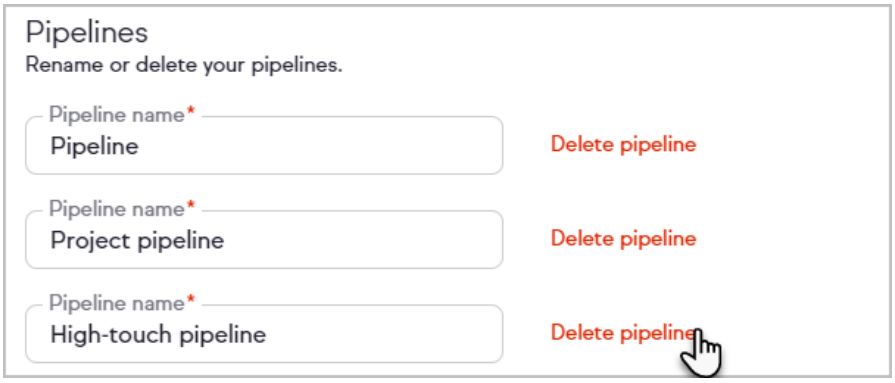


Delete a pipeline

1. Click the ellipses and choose **Manage pipelines**

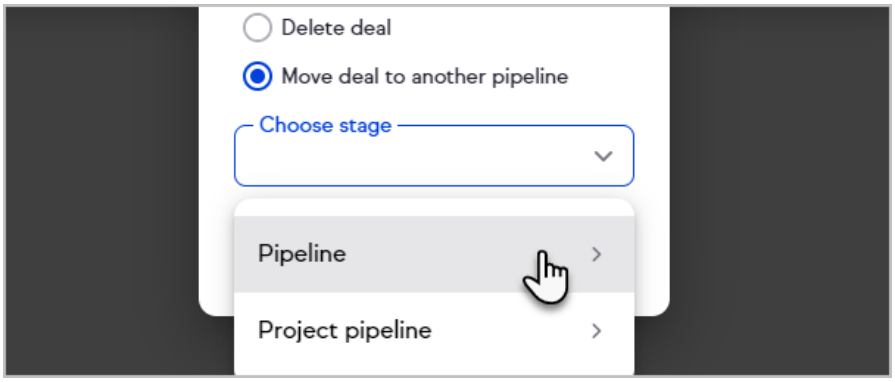


2. Click **Delete pipeline**

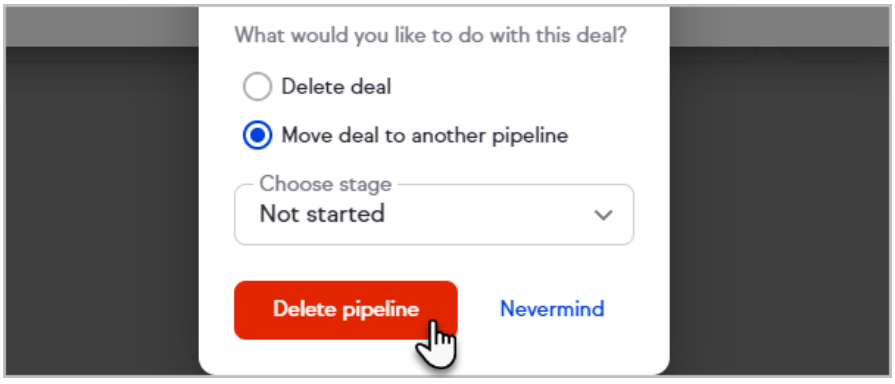


Please note you can only delete the pipelines one at a time, we do not have a bulk option to delete multiple pipelines at once.

3. Select whether existing deals should be deleted or moved to another pipeline

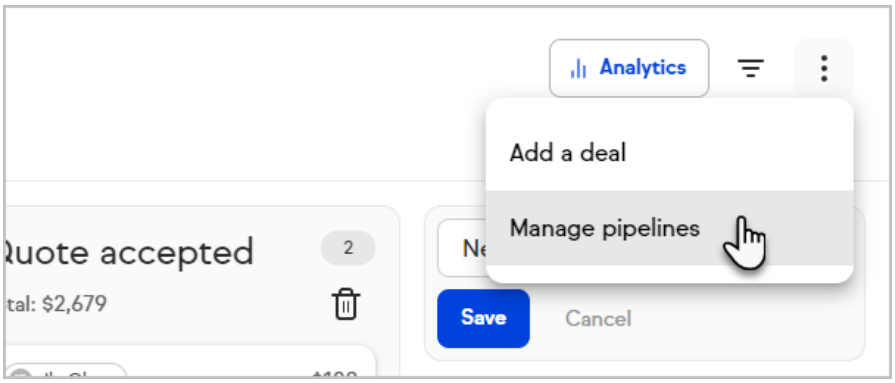


4. Click **Delete pipeline**

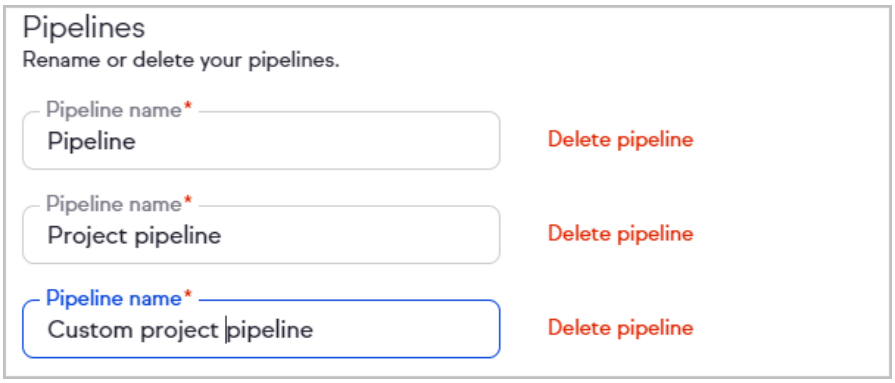


Rename a pipeline

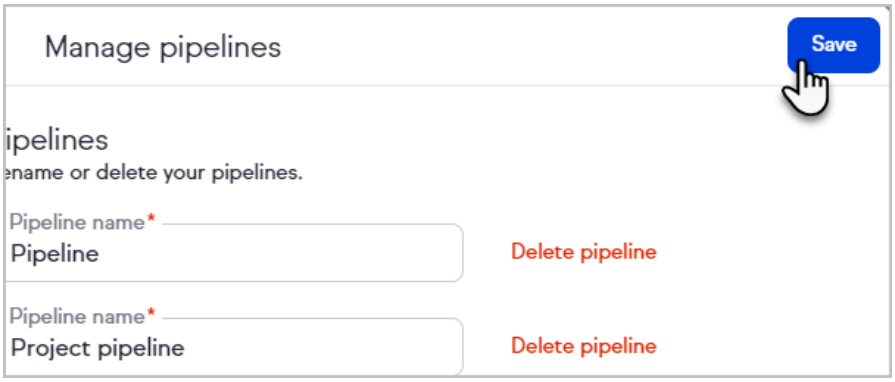
1. Click the ellipses and choose **Manage pipelines**



2. Edit the name of your pipeline



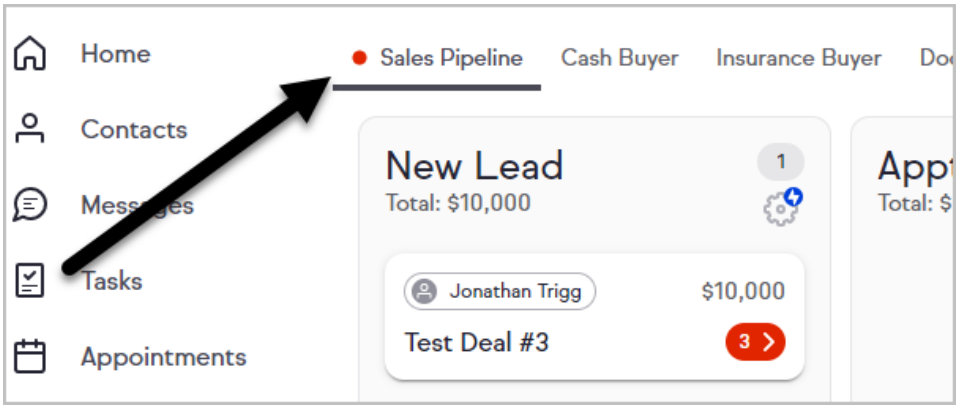
3. Click **Save**



Pipeline to-dos

If multiple pipelines are added and there is a deal that has an outstanding task, there will be a dot that displays on the tab until the tasks are completed. This will help you stay on top of deals that need your attention most.

Note that you can hover over the dot to see the number of tasks that need to be completed for that pipeline.


Home
Contacts
Tasks
Appointments
Sales Pipeline
Cash Buyer
Insurance Buyer
New Lead
Total: $10,000
1
Jonathan Trigg
$10,000
Test Deal #3
3