Pipeline Report

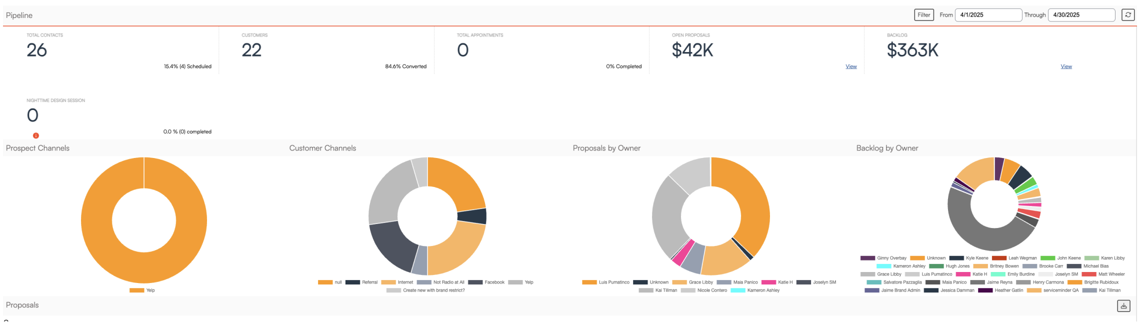
11/18/2025 4:11 pm CST

Overview

The Pipeline report provides a summary of your entire revenue pipeline. You can filter by date range, GeoZone, Service, or Accounting Classes.

Main Information

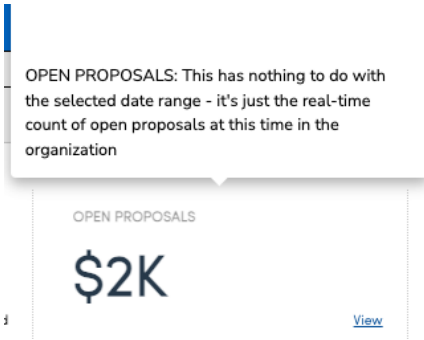
The top bar contains the fields for modifying the date range of the report as well as the Refresh button for updating the report to match the selected date range.



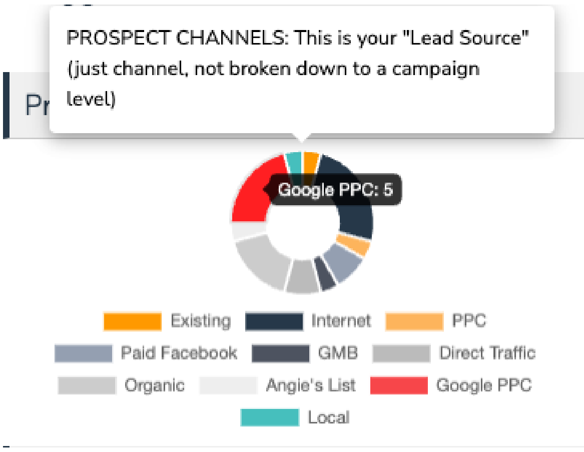
Label	Description
Total Contacts	Number of Contacts added within selected time frame.
Customers	Number of Contacts that have become Customers. Percentage of Customers that have become Contacts in subtext.
Total Appointments	Number of Appointments scheduled for selected time frame. Percentage completed in subtext.
Open Proposals	Total value of open proposals in dollars. Subtext has link to Open Proposals.
Backlog	Total value of backlogged Appointments. Subtext has link to Backlog.
Proposal Generating Services (variable)	Each Service with a Service Role set to Generate Proposal upon finish will have a counter generated for the total number of Appointments scheduled within the date range. The subtext displays the percentage and quantity of these Appointments that have been completed.

Tip

Hover over the titles of the top section will give you more information about what each section is calculating.



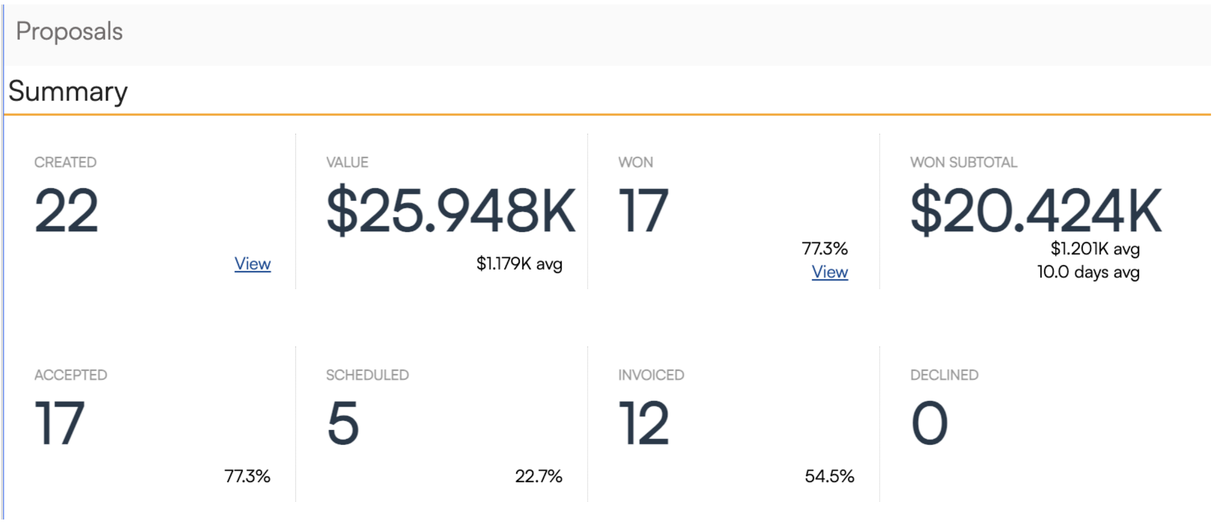
Hovering over the pie chart sections will reveal the details such as number of leads or dollar values.



Label	Description
Prospect Channels	Displays the number of contacts added within the timeframe and divides them by channel.
Customer Channels	Displays the number of contacts added in the customer category within the timeframe and divides them by channel.
Proposals by Owner	Displays the value of proposals divided by owner.
Backlog by Owner	Displays the value of backlogged appointments divided by owner.

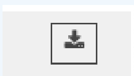
Proposals

Proposal information is displayed in total and the following sub-sections break it down by owner of the proposal.



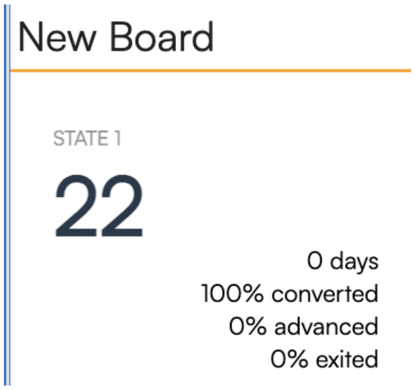
Label	Description
Created	Number of Proposals created.
Value	Total value of all Proposals.
Won	Total of all proposals that are completed, invoiced, scheduled, and accepted.
Revenue	Total value of all invoiced Proposals
Accepted	Number of accepted Proposals. Subtext contains percentage of Proposals accepted.
Scheduled	Number of scheduled Proposals. Subtext contains percentage of Proposals scheduled.
Invoiced	Number of invoiced Proposals. Subtext contains percentage of Proposals invoiced.
Declined	Number of declined Proposals. Subtext contains percentage of Proposals declined.

Everything from Proposal section and down is able to be downloaded. Look for the download icon in the far right of the Proposal section header.



Taskboard Tracker

If you utilize Taskboards, this report will also provide information how many contacts are on those boards and the conversion percentage.



To learn more about TaskBoards, visit this help page.

FAQs

If I create a proposal one week and it's accepted the next week, when will it show as "Won"?

The proposal will show as Won in the filtered date range when it was created. So if you filter on this week, it won't show as Won this week; if you change it to last week, when it's created date falls, then it would show as Won.

How are the numbers of prospect contacts and total contacts not adding up?

Say you have 30 **Total Contacts** and 22 in **Prospect Channel** (the circle graph below that category). The Prospect Channels chart shows 22 because out of the 30 Total Contacts above, 8 were converted to Customers.

Once a contact is converted into a customer, they're no longer going to be considered a prospect.

Why don't the Contacts and Appointments directly correlate?

For the Contacts and Customers, that is directly related. As an example, you have 10 new contacts and 5 became customers.

The appointments are a little different, they're based on the number of appointments scheduled in that date range that have a finish action of Generate Proposal. Using the example image above, the Estimate Appointment is one of those services. If it says 6 estimates were scheduled and 50% were completed, which probably means some were cancelled or weren't completed in the time frame that the report is set to look at.

So the appointments don't directly correlate to the Contacts/Customers numbers there.

In the total contacts section, can you explain how someone would have more scheduled appointments then contacts that came in?

It's going to count all the appointments the contact has, not just the first appointment.

Can you clarify what the difference is between Won Proposals and Revenue?

Won Revenue is all accepted proposals regardless of invoices or payments received. Invoice Revenue refers to invoices created regardless of payments received to those invoices.