

Sales Pipeline Full Flow

Run: 2026-01-18T23:21:36.438Z

Base URL: http://127.0.0.1:5000

Lead ID: 44

Client: E2E Client 1768778403883

Project: E2E Project 1768778403883

01 lead details saved

The screenshot shows the 'Lead Details' page for a lead named 'E2E Client 1768778403883'. The top navigation bar includes links for 'Enroll', 'No Folder', 'Leads', '\$25,000', '\$ QBO Offline', and a 'Delete' button. Below the navigation, there are tabs for 'Lead Details', 'Quote Builder', 'Version History', 'Proposal', 'PandaDoc', 'Documents', and 'Engagement'. A large central area contains a file upload section with a placeholder 'Quick Upload (NDA, Floor Plans)' and a 'Upload File' button. Below this is a 'Marketing Influence' section where the user has selected 'Existing Customer' from a dropdown menu. At the bottom of the page, a blue bar features a 'Force Sync' button with the note 'Changes autosave. Use this for a full sync.' To the right, a 'Success' message is displayed.

E2E Client 1768778403883
E2E Project 1768778403883

Lead Details Quote Builder Version History Proposal PandaDoc Documents Engagement

Quick Upload (NDA, Floor Plans)

Upload File

Marketing Influence

Select touchpoint

Existing Customer X

Auto-save enabled

Force Sync

Changes autosave. Use this for a full sync.

Success

02 pipeline progressed to on hold

E2E Client
1768778403883
E2E Project 1768778403883

EC1-260118-0043

Enroll No Folder Open Folder Negotiation \$25,000 \$ QBO Offline Delete

Lead Details Quote Builder Version History Proposal PandaDoc Documents Engagement

\$ Deal Status

Estimated Deal Value: 25000 Probability of Closing: 50% (0% to 100%)

Project Timeline: Q2 2026

First impression of client's timeline expectations

Deal Stage*: On Hold

Lead Source*: Website Priority: 4 - High

Auto-save enabled

Saving... Changes autosave. Use this for a full sync.

Success: Deal updated successfully

03 quote saved

E2E Client 1768778403883 EC1-260118-0043
E2E Project 1768778403883

Enroll No Folder Open Folder On Hold \$25,000 \$ QBO Offline Delete

Lead Details Quote Builder Version History Proposal PandaDoc Documents Engagement

Quote Version History
Track all quote revisions for this deal

No Quotes Yet
Create your first quote using the Quote Builder tab.

Start Quote

Quote saved successfully
Your quote has been saved.

04

version history shows quote

E2E Client 1768778403883 EC1-260118-0043

Lead Details Quote Builder Version History 1 Proposal PandaDoc Documents Engagement

Quote Version

Version 1

Quote: Q1768778415947 \$48,750

less than a minute ago

Quote # – Created

05

quote updated

E2E Client 1768778403883 EC1-260118-0043

Lead Details Quote Builder Version History 1 Proposal PandaDoc Documents Engagement

Quote Version

Version 1

Quote: Q1768778415947 \$48,750

less than a minute ago

Quote saved successfully
Your quote has been saved.

06 proposal builder saved draft

← **Proposal Builder**
E2E Client 1768778403883

Select template...

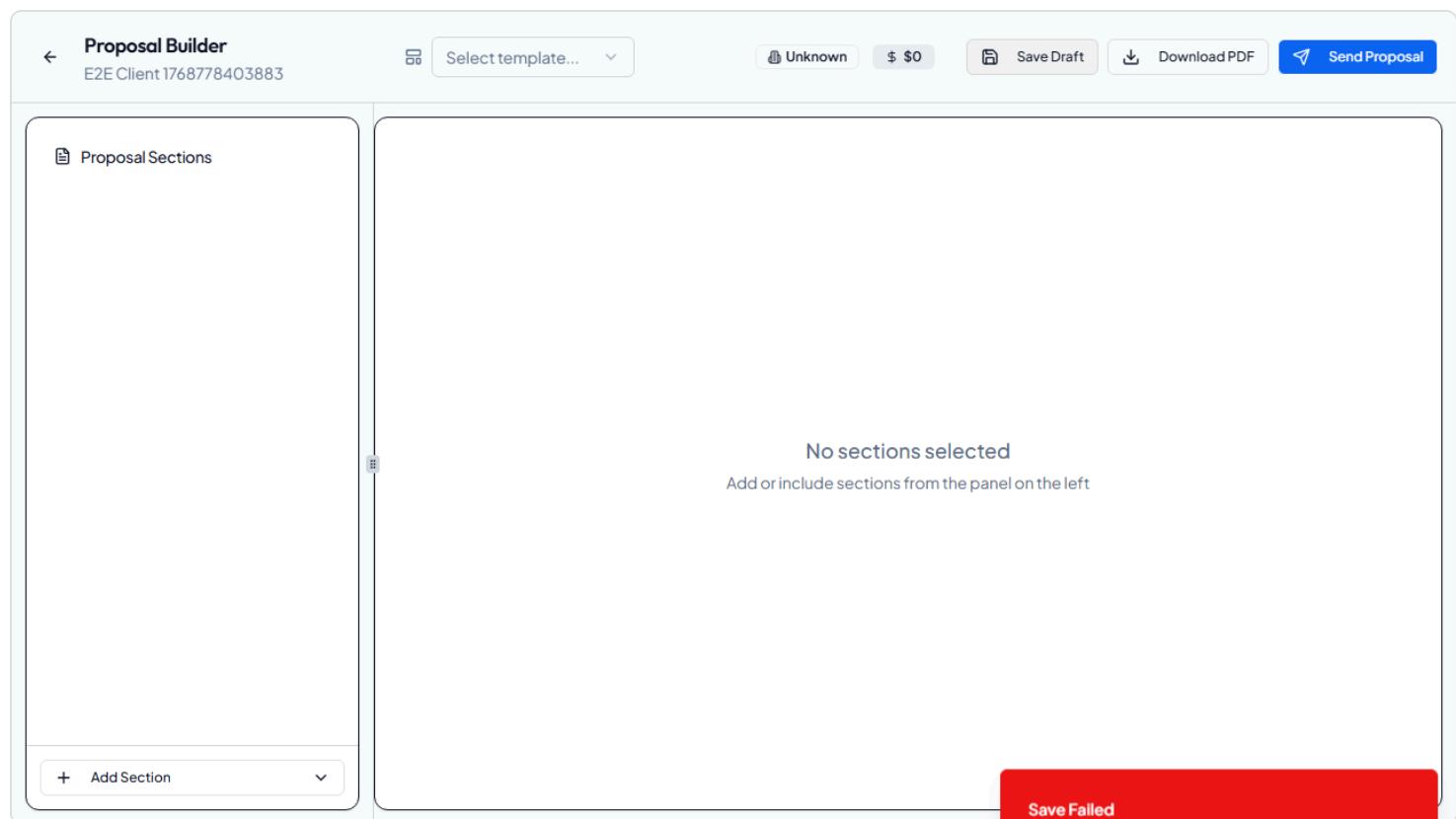
Unknown \$ 0 Save Draft Download PDF Send Proposal

Proposal Sections

No sections selected
Add or include sections from the panel on the left

+ Add Section

Save Failed



07 document uploaded

← **E2E Client 1768778403883** EC1-260118-0043
E2E Project 1768778403883

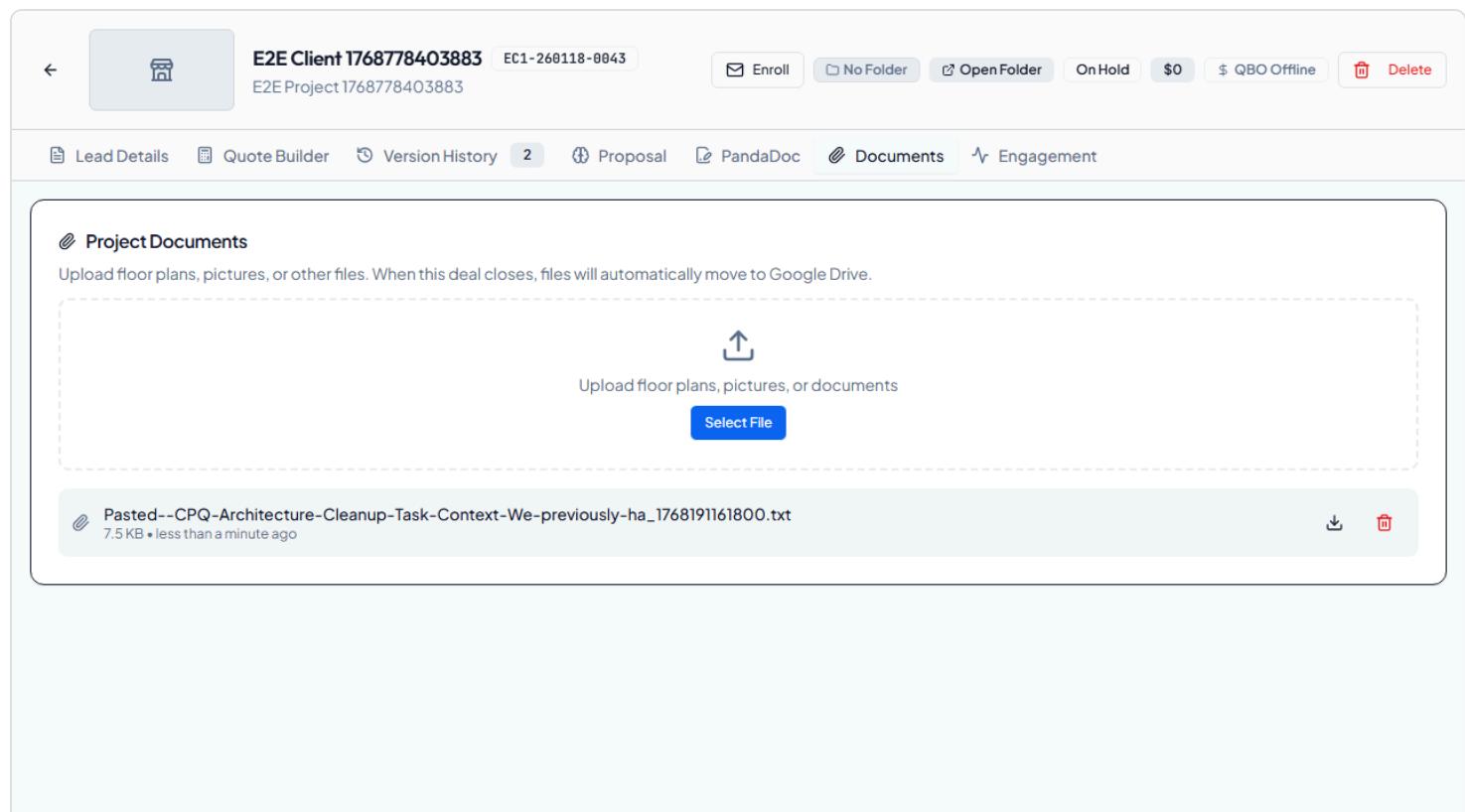
Enroll No Folder Open Folder On Hold \$ 0 QBO Offline Delete

Lead Details Quote Builder Version History 2 Proposal PandaDoc Documents Engagement

Project Documents
Upload floor plans, pictures, or other files. When this deal closes, files will automatically move to Google Drive.

Upload floor plans, pictures, or documents

Pasted--CPQ-Architecture-Cleanup-Task-Context-We-previously-ha_1768191161800.txt
7.5 KB • less than a minute ago



08

closed won column

Sales Pipeline

Manage deals through your sales funnel

Sales

Production

Customers

Settings

Hot Leads



AI Assistant



Sync to GHL



Import CSV



Import PDFs



Import from GHL

CPQ Import



Trash



New Deal

Search deals...

All Sources

Pipeline: \$393,068.25 Forecast: \$191,534 Deals: 42

Leads

8

Contacted

1

Proposal

3

Negotiation

\$110,000

\$5,000

\$24,568.25

\$0

 Acme Test Corp
Test Project 2026
123 Test St, Troy, NY 12180

\$ 15,000 ★★★☆☆ 50%



Last contact: Jan 18

Classify < > Open

 Browser Test Client
Browser Test Project
123 Browser Way

\$ 5,000 ★★★☆☆ Manual Entr.

0%

Last contact: Jan 18

Classify < > Open

 Acme Test Corp
Test Project 2026
123 Test St, Troy, NY 12180

\$ 15,000 ★★★☆☆ 50%



Last contact: Jan 18

Classify < > Open

 E2E
E2E
1231

\$ 0 ★ 1

Last con

BP-AI

 Acme Test Corp
Test Project 2026
123 Test St, Troy, NY 12180

\$ 15,000 ★★★☆☆ 50%



Last contact: Jan 18

Classify < > Open

 TPG Architecture
667 Madison Ave
667 Madison Ave, New York, NY 10065

\$ 9,568.25 ★★★☆☆ 50%

11,857 sqft 4 interior

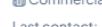
Q1768353122281

Last contact: Jan 17

Classify < > Open

 Acme Test Corp
Test Project 2026
123 Test St, Troy, NY 12180

\$ 15,000 ★★★☆☆ 50%



Last contact: Jan 18

Classify < > Open

 TPG Architecture
667 Madison Ave
667 Madison Ave, New York, NY 10065

\$ 0 ★★★☆☆ 50%

11,857 sqft 4 interior

Q1768353122281

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Test Project 2026
123 Test St, Troy, NY 12180

\$ 15,000 ★★★☆☆ 50%

Last contact: Jan 18

Classify < > Open

 Test Pipeline Client
Pipeline Test Project
Address TBD

\$ 5,000 ★★★☆☆ Manual Entr.

0%

Last contact: Jan 18

Classify < > Open

Local Developer

elijah@scan2plan.io

Log Out

09 production project created

 Scan2Plan-OS
CEO Hub

Sales

Production

Customers

Settings

Local Developer
elijah@scan2plan.io

[Log Out](#)

Production Tracker

Monitor project status from scanning to delivery.

[New Project](#)

SCHEDULING	SCANNING	REGISTRATION	MODELING
<p>E2E Client 1768778403883... EC1-260118-0043</p> <p>No deadline Unassigned</p> <p>LoD 300 LoA 40 LoA 30</p> <p>Progress 0%</p>	<p>Test No deadline Unassigned</p> <p>LoD 300 LoA 40 LoA 30</p> <p>Progress 0%</p>		
<p>E2E Client 1768778180597... EC1-260118-0042</p> <p>No deadline Unassigned</p> <p>LoD 300 LoA 40 LoA 30</p> <p>Progress 0%</p>			