

# 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

E2E Client 1768778403883

E2E Project 1768778403883

Enroll

No Folder

Leads

\$25,000

\$ QBO Offline

Delete

Lead Details

Quote Builder

Version History

Proposal

PandaDoc

Documents

Engagement

Quick Upload (NDA, Floor Plans)

Upload File

Marketing Influence

Track touchpoints that influenced this deal

Select touchpoint

+

Existing Customer X

Auto-save enabled

Force Sync

Changes autosave. Use this for a full sync.

Success

## 02



## 03



Quote saved successfully  
Your quote has been saved.

## 04 version history shows quote

E2E Client 1768778403883

EC1-268118-8843

Enroll

No Folder

Open Folder

On Hold

\$48,750

\$ QBO Offline

Delete

Lead Details

Quote Builder

Version History1

Proposal

PandaDoc

Documents

Engagement

Quote Version History

Track all quote revisions for this deal

Version 1

Quote: Q1768778415947 \$48,750

less than a minute ago

Quote Version

Quote # - Created

## 05 quote updated

E2E Client 1768778403883

EC1-268118-8843

Enroll

No Folder

Open Folder

On Hold

\$48,750

\$ QBO Offline

Delete

Lead Details

Quote Builder

Version History1

Proposal

PandaDoc

Documents

Engagement

Quote Version History

Track all quote revisions for this deal

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

+ Add Section

▼

No sections selected

Add or include sections from the panel on the left

Save Failed

## 07 document uploaded

←

🏠

E2E Client 1768778403883

EC1-268118-8843

✉️ 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

Select File

📄 Pasted--CPQ-Architecture-Cleanup-Task-Context-We-previously-ha\_1768191161800.txt


7.5 KB • less than a minute ago

📄 🗑️



## Sales Pipeline

Manage deals through your sales funnel

 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

\$110,000

8

### Contacted

\$5,000

1

### Proposal

\$24,568.25

3


### Negotiation

\$0


☐ Acme Test Corp


Test Project 2026  
123 Test St, Troy, NY 12180

\$ 15,000 ★★★★★ 50%

 Commercial

Last contact: Jan 18

Classify 


< > 

Open


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\$ 15,000 ★★★★★ 50%

 Commercial

Last contact: Jan 18

Classify 

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Open


☐ Test Pipeline Client


Pipeline Test Project  
Address TBD

\$ 5,000 ★★★★★ Manual Entr

0%

Last contact: Jan 18

Classify 

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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%

 Commercial

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

☐ TPG Architecture


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


\$ 0 ★★★★★ 50%

 11,857 sqft  4 interior

 Q1768353122281

Last contact: Jan 17

Classify 

< > 

Open

☐ E2E

E2E  
1231

\$ 0 ★★★★★

Last con

BP-AI



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

9

SCANNING

1

REGISTRATION

0

MODELING

0

Medium

Open

E2E Client 1768778403883 ...

EC1-260118-0043

No deadline

Unassigned

L00 300

LoA 40

LoA 30

Progress

0%

Medium

Open

E2E Client 1768778180597 ...

EC1-260118-0042

No deadline

Unassigned

L00 300

LoA 40

LoA 30

Progress

0%

Medium

Open

Test

No deadline

Unassigned

L00 300

LoA 40

LoA 30

Progress

0%