**Set Up Kanban (Pipeline) in moonstride**

*Visually track every lead, enquiry, quote, and booking as it moves through your sales pipeline. The Kanban (pipeline) view enables easy management, updating, and follow-up at every stage, giving you a clear overview and control over your sales process.*

**Table of Contents**

1. Kanban View Overview
2. Filter
3. Sales Pipeline Stages
4. Switch to Pipeline View
5. See Also

**1. Kanban View Overview**

The **Kanban view** (also known as Pipeline View) presents each lead or enquiry as a card, showing which stage of the journey it’s in (e.g., Enquiry, Quotation, Booking). It lets users instantly identify a customer’s current status and manage all related tasks, follow-ups, and activities.

* New enquiries by default are assigned to the "New Lead" stage.
* Custom pipeline stages can be set up for Enquiry, Quotation, and Booking to perfectly match your business workflow.

**Accessing Pipeline View:** From the **Enquiry List**, click the Pipeline View icon (highlighted at the top of the Enquiry List screen).

*Insert screenshot here showing the Enquiry List screen with the Pipeline View icon highlighted.*

In the Pipeline View, users can see all leads distributed across the defined pipeline columns, take quick actions, and maintain full control.

**2. Filter**

To help you efficiently search and segment data in Pipeline View, a **Filter** option is available.

* Click the **Filter** button in Pipeline View (top corner) to open the filter options.
* Search by:
  + Enquiry Date range
  + Created By (who entered the enquiry)
  + Travel Category
  + Status (lead, in process, confirmed, cancelled, etc.)
  + Source of Enquiry (e.g., web, ad, walk-in)
  + Assign To (agent/user currently responsible)
  + Shared with (users who can access this record)

*Insert screenshot here of the Pipeline View Filter panel.*

**Example use:** Set the Enquiry Date from 01/03/2023 to 17/04/2023 and click **Search**. The screen will update to show pipeline status for every enquiry created during that period.

Tick the box labelled *‘See all past untouched / new enquiries within "New Lead" stage’* to quickly find all new or unattended leads.

**3. Sales Pipeline Stages**

Configure pipeline stages for your unique workflow. While the system comes with default stages, you may add, edit, or delete stages to suit your sales model (e.g., Discovery, Quotation Sent, Awaiting Deposit, Confirmed Booking, etc.).

**Navigation:** Go to **Widget → Widgets → Pipeline Stage**.

*Insert screenshot here of the Pipeline Stage configuration screen.*

* Stages can be linked to Enquiry, Quotation, or Booking as parent stages.
* Change the status of a stage (Active/Inactive) by clicking its status label.
* Use the **Sort Order** column and **Save Sequence** button (top left) to arrange the order in which pipeline stages appear for each process area.

For detailed instructions on how to add, edit, or remove pipeline stages, see the [Sales Pipeline Stages](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41) article.

**4. Switch to Pipeline View**

To open Pipeline View from the enquiry screen:

* Click **Pipeline View** (top left of the Enquiry List screen).

You’ll be redirected to **CRM → Enquiry → Pipeline View**. Here, you can:

* View all enquiries, quotes, and bookings mapped to their current pipeline stage columns.
* See summary information and icons on each card (e.g., symbols for attached services).
* Click any card to access full options for that lead/enquiry: edit or cancel the enquiry, edit quotations, manage bookings, add/view notes, add/view tasks, see all related services, and more.
* Filter enquiries using the **Filter** button as above.
* Add a new Enquiry from the **Add** button (top left) in Pipeline View.
* Change the status, visibility, or sort order of pipeline stages directly.

*Insert screenshot here showing the full Pipeline View with action prompts, stage columns, and service icons.*

**5. See Also**

* [Sales Pipeline Stages](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Managing Enquiries](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Set Up Enquiry Follow Up](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Enquiry Calendar View](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

The Kanban (Pipeline) View in moonstride provides a powerful, visual way to manage every lead from first contact to booking. Use the Filter, Pipeline Stage settings, and on-card actions to maintain momentum on every opportunity and ensure nothing slips through the cracks.