STAGES

OUTSIDE OF PIPELINE		LEAD KICK-OFF	CLIENT APPLICATION	DISCOVERY CALL	SEND PROPOSAL	PROPOSAL ACCEPTED	SEND CONTRACT	CLIENT WELCOME	COMPLETE
In Firm settings, 1. Ensure client sign-up is turned on in firm settings. 2. Must also be turned on to add jobs to pipeline	AUTOMATIONS	SEND MESSAGE: LD-CLIENT APPLICATION	SEND MESSAGE: LD- APPLICATION RECEIVED	SEND EMAIL: LD- SCHEDULE A CALL	TASK: LD- DISCOVERY CALL COMPLETE	TASK: LEAD PROPOSAL ACCEPTED OR REJECTED	TASK: LD- UPDATE CONTRACT TERMS & SEND	UPDATE TAGS: ADD NEW CLIENT, REMOVE: NEW LEAD	TASK: LD- SET UP RECURRING INVOICES
Lead comes in via website, DM or email. Use client portal link		SEND EMAIL: LD- CLIENT APPLICATION HAS BEEN SENT	SEND EMAIL: LD- YOUR APPLICATION HAS BEEN RECEIVED	TASK: LD- CONFIRM CALL BOOKED	TASK: LD- UPDATE & SEND PROPOSAL IF NEEDED		TASK: LD- CREATE & SEND DEPOSIT INVOICE (NON TAX PREP)	SEND EMAIL: LD-WELCOME & NEXT STEPS (NON-TAX PREP)	TASK: LD- ADD JOBS TO PIPELINE(S)
Lead signs into portal to complete application		SEND ORGANIZER: NEW LEAD APPLICATION	TASK: LD- REVIEW APPLICATION		TASK: UPDATE RELEVANT TAGS			SEND EMAIL: LD-WELCOME & NEXT STEPS (TAX PREP ONLY)	TASK: LD-ARCHIVE JOB
New client application enters lead into pipeline automatically		ADD TAG: NEW LEAD						SEND: NEW CLIENT ORGANIZER(non-tax prep)	
		AUTOMOVE: ON	AUTOMOVE: OFF	AUTOMOVE: ON	AUTOMOVE: ON	AUTOMOVE: OFF	AUTOMOVE: ON	AUTOMOVE: ON	