Pipeline stages and gates

Renaming, reordering and adding stages, setting target days, and choosing the gates a deal must satisfy to leave each stage.

Your pipeline is the ordered list of stages a deal moves through. Gorilla Dash seeds a ten-stage default the first time anyone opens the module, and **Pipeline stages** in **Development Settings** is where a Manage user shapes it to how your brand sells.

The default pipeline

Enquiry, Qualification, Application, Discovery, Disclosure, Discovery Day & Validation, Financing & Approval, Agreement, Signed, Closed Lost. Brands rename and reorder these freely; some hold discovery day before disclosure, others after.

Adding or editing a stage

1. Click **Create**, or the pencil on an existing stage.
2. Give it a **name** and a **colour** — the colour is what the board columns and chips use.
3. Choose **what this stage is**. This is the stage's kind, so reports can compare brands whose stage names differ.
4. Choose the **outcome**: Open for a working stage, Signed (won) for the stage a signed deal lands in, Lost for the closed-lost stage.
5. Set the **chance of signing** as a percentage, and optionally **target days in stage** — deals past it show as slow.
6. Pick the **gates that must be met to leave**, then Save.

The gates

These are the gate names exactly as the **Gates that must be met to leave** picker shows them, so you can match this table to the screen.

Gate	Met when
application complete	The deal's qualification has been marked complete.
nda accepted	A signed confidentiality agreement (NDA) is on file.
territory reserved	The deal holds an active territory reservation.
disclosure issued	A current disclosure document has been issued to the candidate.
disclosure receipt signed	The candidate has signed the disclosure receipt.
waiting period elapsed	The legal waiting period after the receipt has run out.

discovery day attended	Attendance at a discovery day is recorded.
validation calls min	The required number of validation calls with existing franchisees are complete. Three is the usual number.
financing confirmed	Financing confirmed is ticked on the deal.
checks complete	Every background, credit and identity check has passed or been waived.
approved	The approval committee has approved the deal.
agreement signed	The agreement has been signed by the candidate.
agreement countersigned	The agreement has been countersigned by the franchisor.
fee paid	The initial fee is recorded as paid.
cooling off elapsed	The post-signing cooling-off period has run out.

GATES READ RECORDS, NOT PROMISES

A gate is only met when the matching record exists on the deal. Until documents, disclosures, territories and approvals are being recorded in your organisation, a stage carrying those gates can only be left with a manager override. Add gates as you start using the records behind them.

Deleting a stage

A stage with deals still in it cannot be deleted — move them first. Deals remember their stage by an internal key, so renaming a stage relabels every deal in it without touching them.