

Sales Pipeline Board

User Guide

Drag-and-drop sales pipeline for Business Central

For Microsoft Dynamics 365 Business Central

April 2026

Prepared by ProApps Labs LLC

www.ProAppsLabs.com

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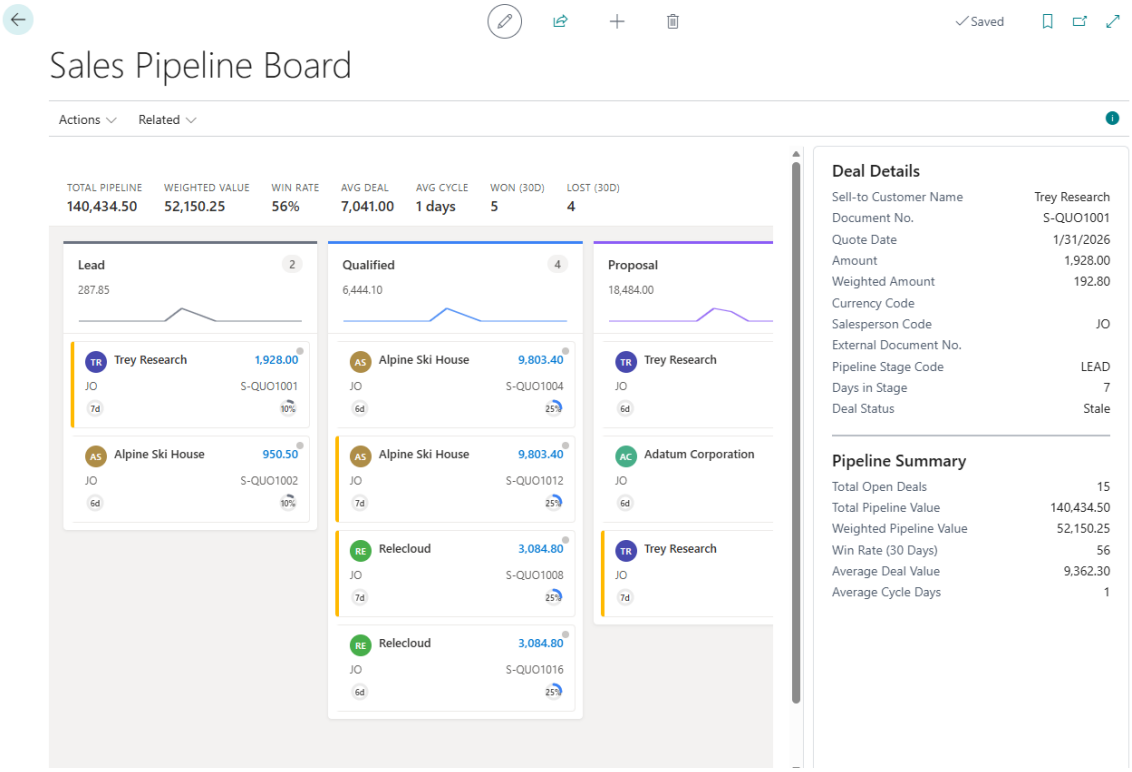
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1. Introduction

The Sales Pipeline Board extension by ProApps Labs brings a visual, Kanban-style drag-and-drop pipeline board to Microsoft Dynamics 365 Business Central. It transforms how sales teams manage quotes by displaying deals as cards organized into configurable stage columns.

Instead of scrolling through lists and manually updating fields, sales representatives drag deal cards between columns to advance opportunities through the pipeline. The extension tracks every stage transition, highlights stale deals, calculates win/loss analytics, and automates closing actions like converting won deals to orders.



The Sales Pipeline Board with deal cards arranged across configurable stage columns.

Who is it for?

- Sales representatives who manage open quotes day-to-day and need a visual workspace.
- Sales managers who want at-a-glance pipeline health, win-rate, and stale-deal coverage.
- BC administrators configuring sales workflows for the team.

2. Getting Started

2.1 Prerequisites

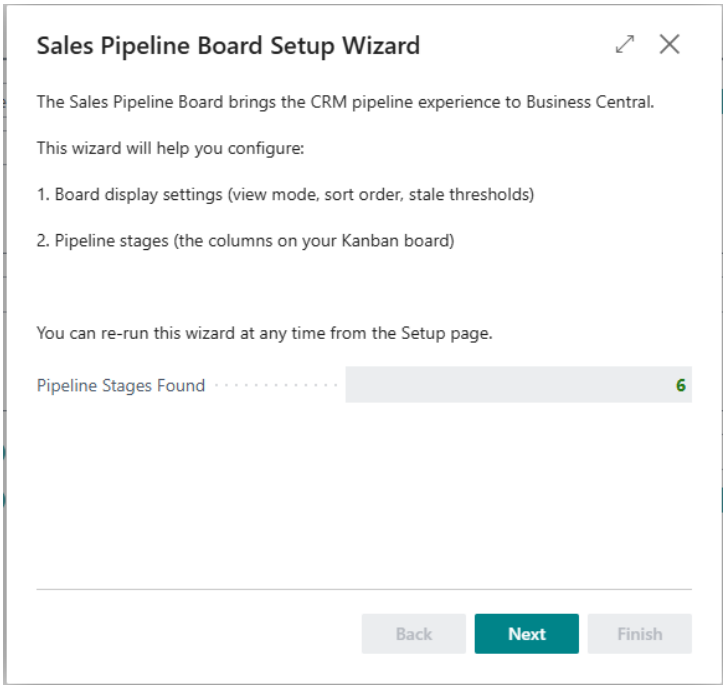
- Microsoft Dynamics 365 Business Central — current online or on-premise versions.
- ProApps Command Center installed (required dependency).
- A user with the SPB Admin-SPB or SPB User-SPB permission set assigned.

2.2 Running the Setup Wizard

On first install, the Setup Wizard launches automatically. You can also run it any time by searching for "Sales Pipeline Board Setup Wizard" or finding it in Assisted Setup.

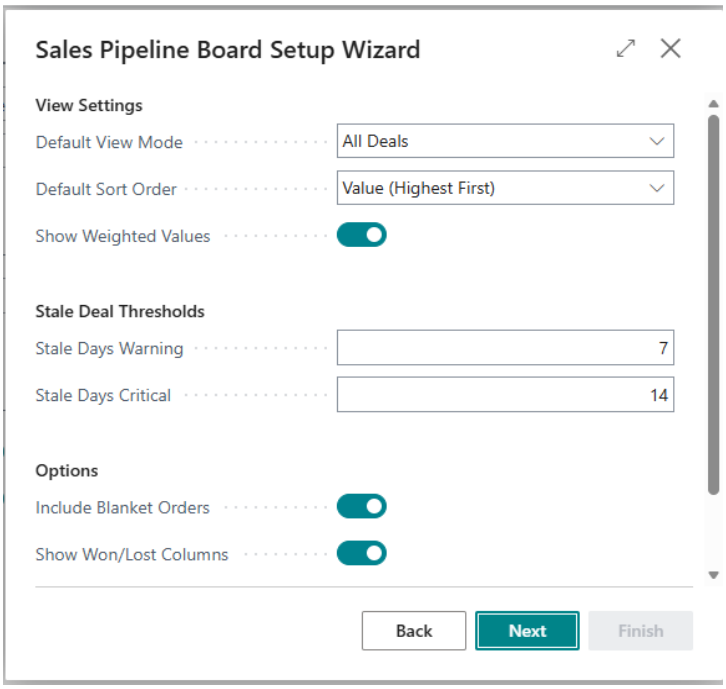
The wizard walks you through four steps:

1. Welcome — overview of what the wizard configures plus a count of detected pipeline stages.



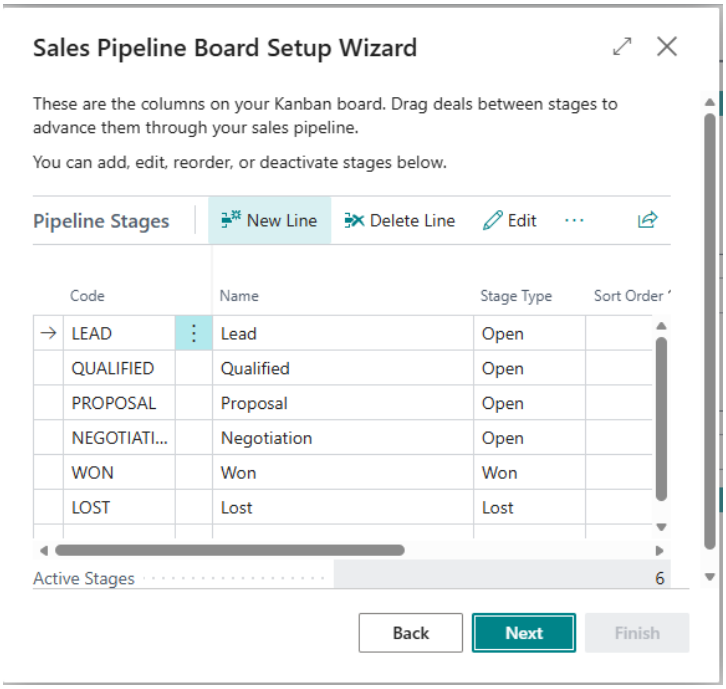
Step 1 — Welcome.

2. Board Display Settings — default view mode, default sort order, weighted-value toggle, stale-deal thresholds, blanket-order inclusion, Won/Lost column visibility.



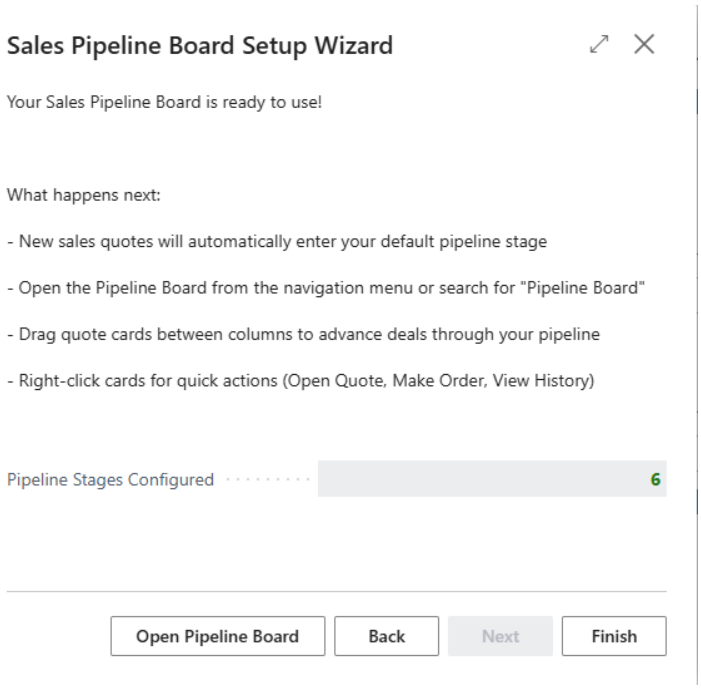
Step 2 — set the board defaults.

3. Pipeline Stages — review, add, rename, reorder, or deactivate the columns on the Kanban board.



Step 3 — review and tune the columns. Each row is a column on the board.

4. Finish — open the Pipeline Board immediately, or close the wizard.



Step 4 — Open Pipeline Board jumps straight into the new board.

2.3 Permission Sets

Permission Set	Description
SPB Admin-SPB	Full access. Can modify setup, configure stages, view all analytics, and manage all deals. Assign to sales managers and administrators.
SPB User-SPB	Standard access. Can view the board, drag deals between stages, view history and analytics, and manage personal filter presets. Cannot modify setup or stage configuration.

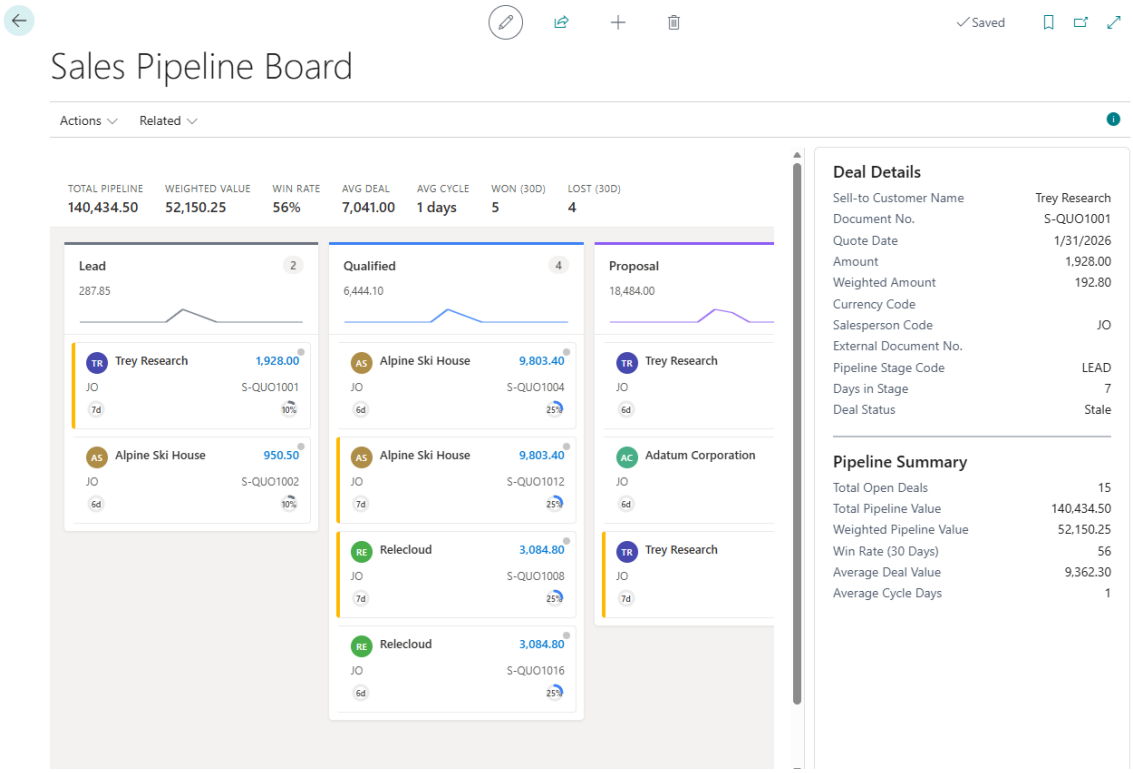
3. The Pipeline Board

3.1 Accessing the Board

There are three ways to open the Pipeline Board:

5. Search for "Pipeline Board" in the Tell Me bar.
6. Click Open Pipeline Board on the Setup Wizard finish step.
7. Add the Sales Pipeline Board page to your Role Center via Personalize.

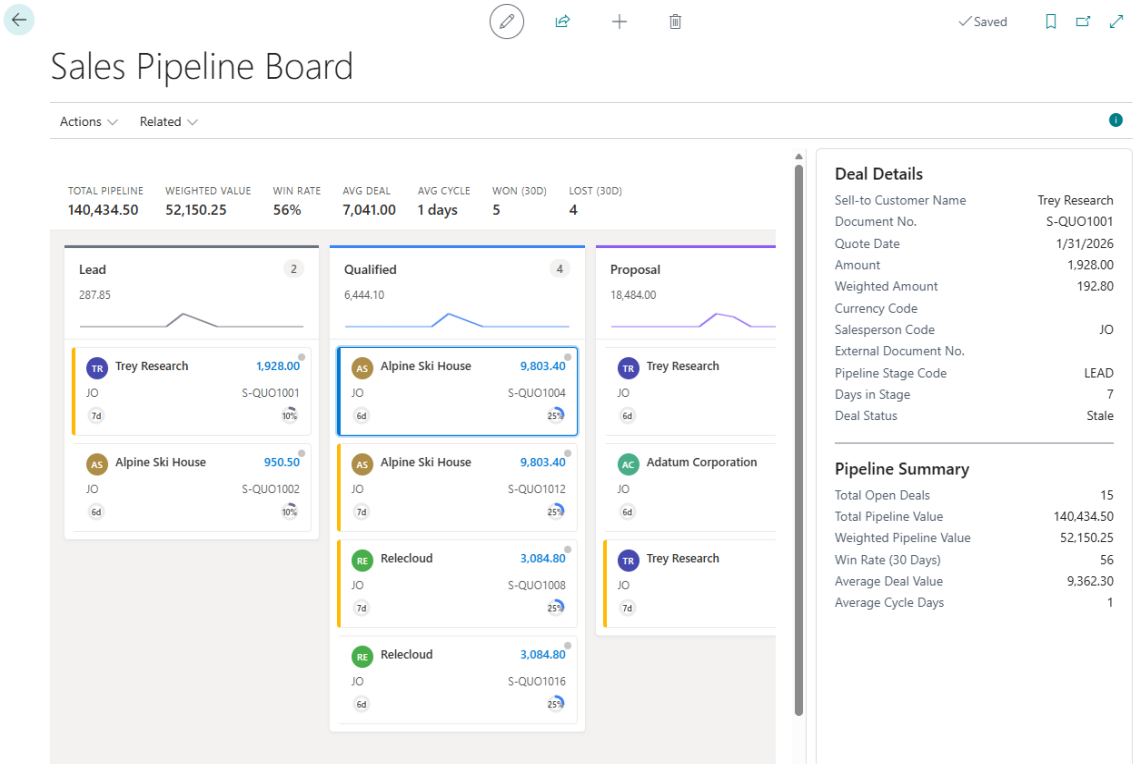
3.2 Understanding the Layout



Summary bar across the top, stage columns down the middle, Deal Details and Pipeline Summary FactBoxes on the right.

Area	Description
Summary Bar	Top of the page. Shows Total Pipeline, Weighted Value, Win Rate, Avg Deal, Avg Cycle, Won (30D), Lost (30D).
Stage Columns	One column per active pipeline stage. Each column header shows the stage name, deal count, total value, and a 14-day trend sparkline.
Deal Cards	Card per active sales quote. Customer name, deal value, salesperson, document number, days-in-stage badge, and probability ring.
Won / Lost Columns	Sit at the right edge by default. Cards land here when deals close.
Deal Details FactBox	Right panel summary of the selected card.
Pipeline Summary FactBox	Right panel aggregate metrics for the whole board.

3.3 Reading Deal Cards



A selected deal card highlights with a teal border. The card shows everything you need to triage at a glance.

Element	Description
Customer Name	The sell-to customer name from the underlying sales quote.
Amount	Total amount of the quote.
Salesperson	Assigned salesperson code.
Document No.	Sales quote document number.
Days-in-Stage Badge	Numeric badge showing how many days the deal has been in its current stage.
Probability Ring	Win probability inherited from the stage configuration.
Stale Indicator Bar	Amber or red side bar when the deal has exceeded its warning or critical threshold.

3.4 Stale Deal Indicators

Deals that remain in a stage too long are visually highlighted. Cards crossing the warning threshold show an amber side bar; cards crossing the critical threshold show red. For example, with a 7-day warning and 14-day critical threshold, a deal sitting in the same stage for 10 days shows amber, and one sitting for 15 days shows red.

Stale thresholds work on a two-tier system. Stage-level thresholds (configured per stage) take priority. Global thresholds (configured in Board Settings) apply when a stage does not define its own. Always set the warning threshold lower than the critical threshold.

4. Working with Deals

4.1 Drag-and-Drop to Advance Deals

To move a deal to a new stage, click and hold a deal card, drag it to the target stage column, and release. The card snaps into the new column and the underlying sales quote's Pipeline Stage Code is updated.

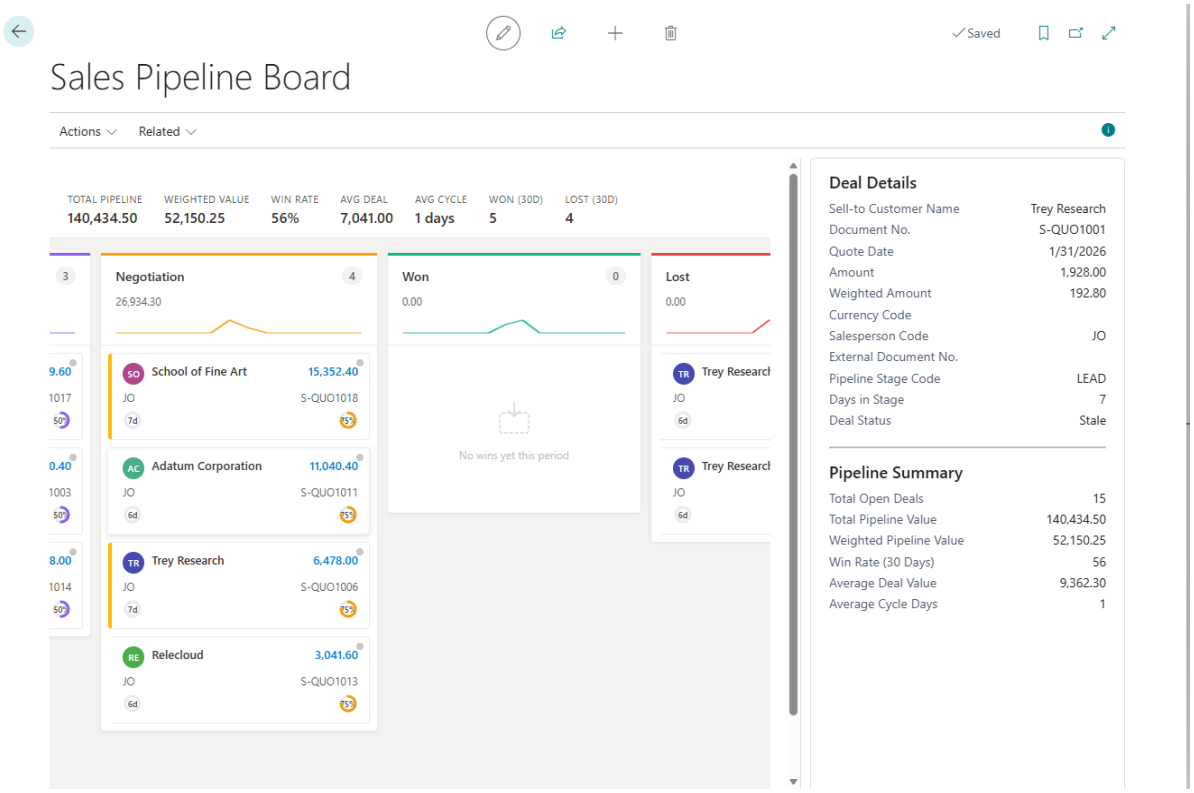
4.2 What Happens on Drag

- The Pipeline Stage Code on the sales quote is updated immediately.
- A row is appended to the Stage History table capturing from-stage, to-stage, timestamp, user, and days in the previous stage.
- The probability ring on the card refreshes to the new stage's probability percentage.
- The summary bar metrics recalculate (total pipeline, weighted value, win rate).
- If the target stage has an Auto Action configured, the action runs (Convert to Order, Archive).

4.3 Auto-Actions: Won and Lost

Two stage types trigger automatic behavior when a deal lands in them. Both auto-actions are configurable per stage from the Pipeline Stages page:

- Won — by default the Auto Action is Convert to Order. The board prompts to confirm and then runs Make Order on the underlying quote.
- Lost — by default the Auto Action is Archive. The quote is archived and the card moves to the Lost column.



Won and Lost columns sit at the right edge so closed deals stay out of the way of active work.

4.4 Clicking and Double-Clicking

Single-click selects the deal card. The Deal Details FactBox on the right updates to show full information about the selected deal.

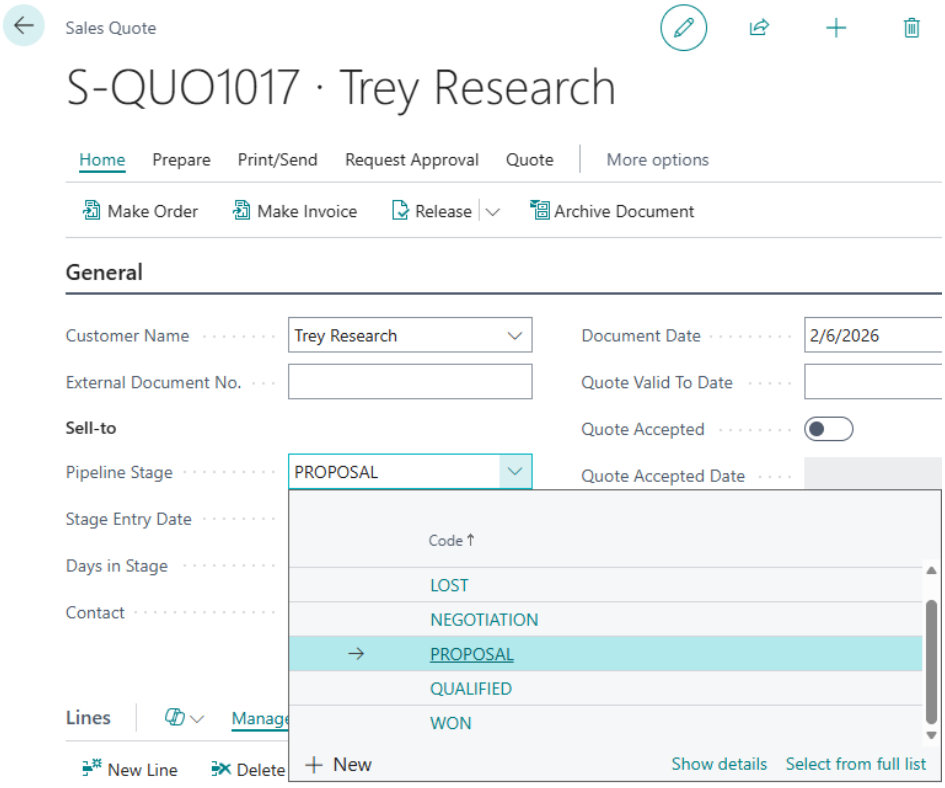
Double-click opens the underlying Sales Quote card directly, allowing you to view or edit the full quote details.

4.5 Right-Click Context Menu

Action	Description
Open Quote	Opens the Sales Quote card for the deal.
Make Order	Converts the quote to a sales order (same as dragging to Won).
View History	Opens the Stage History list filtered to this deal.
Move to Stage	Submenu to move the deal to a specific stage without dragging.
Assign Salesperson	Change the assigned salesperson code on the underlying quote.
View Customer	Opens the customer card.

4.6 Setting the Stage from the Sales Quote

Every Sales Quote includes a Pipeline Stage Code field on the General fasttab. Editing this field on the quote updates the board, and dragging the card on the board updates this field. Either side of the link is the source of truth.



The Pipeline Stage dropdown on the Sales Quote shows every active stage and links the quote into the board.

5. Filtering and Views

5.1 Board View Modes

View	Description
All Deals	Shows all active deals across all salespersons and customers.
My Sales	Filters the board to deals assigned to the current user's salesperson code.
By Customer	Groups and filters deals by a selected customer.

5.2 How "My Sales" Works

The My Sales view reads the Salesperson/Purchaser Code from the current user's User Setup record. If no salesperson code is configured, the view will show no deals. Contact your administrator to ensure your User Setup record has a salesperson code assigned.

5.3 Filter Presets

Personal filter presets let users save and recall combinations of view-mode, salesperson, customer, and date range. Presets are scoped to the current user and are accessed from the View action on the toolbar.

6. Analytics

6.1 Summary Bar Metrics

Metric	Description
Total Pipeline	Sum of all active deal amounts across all stages (excluding Won/Lost).
Weighted Value	Sum of each deal's amount multiplied by its stage probability percentage.
Win Rate	Percentage of deals that reached the Won stage out of all closed deals (Won + Lost).
Avg Deal	Average deal amount across all active deals.
Avg Cycle	Average days from deal creation to reaching Won stage.
Won (30D)	Number of deals moved to the Won stage in the last 30 days.
Lost (30D)	Number of deals moved to the Lost stage in the last 30 days.

6.2 Pipeline Summary FactBox

The Pipeline Summary FactBox on the right side of the board shows a condensed breakdown of deal counts and values by stage, giving a quick snapshot of where deals are concentrated.

6.3 Per-Column Metrics

Each stage column header shows three live metrics: deal count (top-right), total value (under the column name), and a 14-day trend sparkline. The sparkline color matches the column color so you can read trends at a glance.

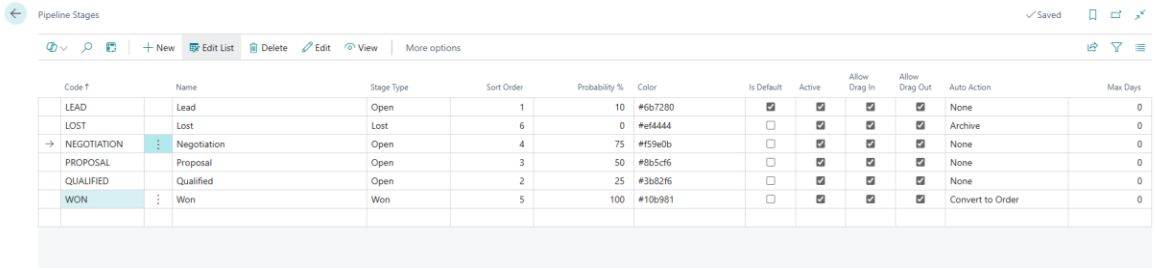
6.4 Analytics Part

For deeper analysis, use the Analytics action in the board toolbar. The Analytics Part includes win/loss bar charts over time, a stage-conversion funnel, deal-velocity trend, and salesperson performance comparison.

7. Pipeline Stages Configuration

7.1 Accessing Stage Setup

Navigate to the Pipeline Board and select Setup → Configure Stages from the toolbar, or search for "Pipeline Stages" in the Tell Me bar. You must have the SPB Admin-SPB permission set.



Pipeline Stages — every column on the board is a row here. Edit inline, or use Edit / New / Delete on the toolbar.

7.2 Stage Properties

Property	Description
Code	Unique short code (e.g., LEAD, QUALIFIED). Becomes the Pipeline Stage Code on Sales Quotes.
Name	Display name shown on the board column header.
Stage Type	One of Open, Won, or Lost. Only one stage may be typed Won and one Lost.

Property	Description
Sort Order	Numeric value controlling left-to-right column position.
Probability %	Default win probability for deals in this stage (0–100).
Color	Column header accent color (hex, e.g., #1A857E).
Is Default	When true, new sales quotes start in this stage.
Active	When false, the column is hidden but historical references remain.
Allow Drag In / Out	Per-stage rules controlling which directions a deal can move.
Auto Action	Action that runs when a deal enters this stage: None, Convert to Order, Archive.
Max Days	Stage-level stale threshold. 0 means inherit from Board Settings.

7.3 Default Stage

One stage should be marked as the default stage. When new sales quotes are created, they are automatically assigned to this stage. Typically this is the first stage in the pipeline (e.g., Lead).

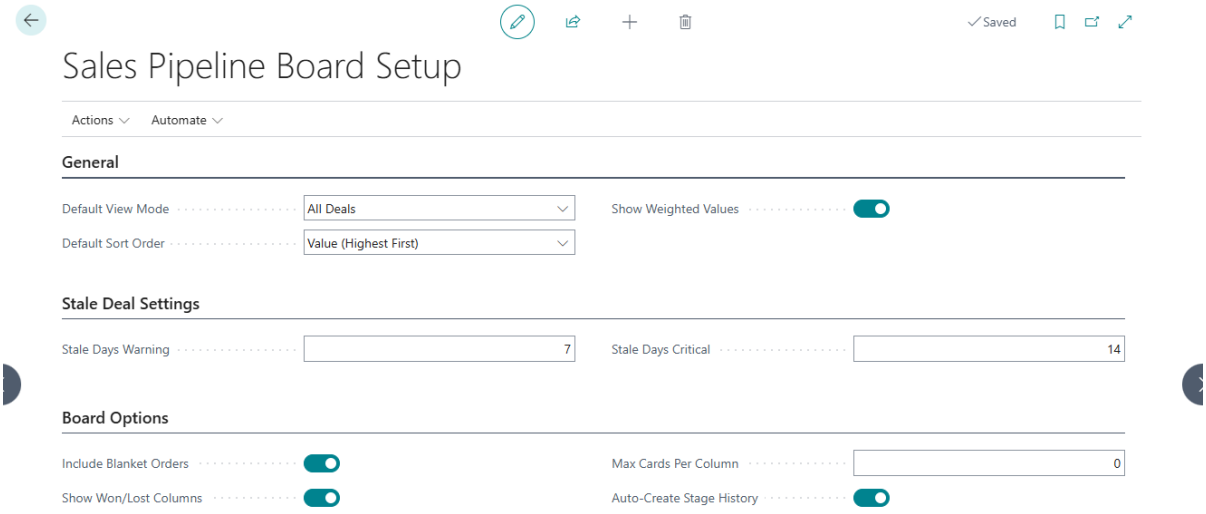
7.4 Won and Lost Stage Types

- Stage Type = Won fires the Auto Action when a deal lands in the column. Default action is Convert to Order; configure to None to disable.
- Stage Type = Lost similarly fires its Auto Action. Default is Archive.
- Both are excluded from the Total Pipeline metric to avoid double-counting closed deals.

8. Board Settings

8.1 Setup Page

Access via Setup → Board Settings from the Pipeline Board toolbar, or search for "Sales Pipeline Board Setup".



Sales Pipeline Board Setup — view defaults, stale thresholds, and board options on a single card.

Field	Description
Default View Mode	View mode the board opens with (All Deals, My Sales, By Customer).
Default Sort Order	Sort applied to cards within a column (Value, Days in Stage, Quote Date).
Show Weighted Values	When ON, summary bar and analytics use probability-weighted deal values.
Stale Days Warning	Global default for days before an amber warning. Stage values override.
Stale Days Critical	Global default for days before a red critical indicator. Stage values override.
Include Blanket Orders	Include blanket-order quotes on the board.
Show Won/Lost Columns	Show or hide the Won and Lost columns at the right edge.
Max Cards Per Column	Soft limit on how many cards render before scroll (0 = unlimited).
Auto-Create Stage History	Append a Stage History row on every drag.

8.2 Stale Thresholds

Stale thresholds work on a two-tier system: stage-level thresholds (configured per stage) take priority, while global thresholds (configured in Board Settings) apply as defaults when a stage does not define its own. Always set the warning threshold lower than the critical threshold.

9. Stage History

9.1 Where to Find It

- Right-click any card on the board → View History.
- Search for "Pipeline Stage History" in the Tell Me bar to see the full table for the company.
- Open the Sales Quote and click the Stage History action.

9.2 What Is Tracked

Field	Description
From Stage	Stage the deal was in before the transition.
To Stage	Stage the deal moved to.
Transition Date/Time	Exact timestamp of the stage change.
User ID	User who performed the drag or action.
Days in Previous Stage	Number of days the deal spent in the from-stage.
Source	Whether the change came from the board (Drag), Sales Quote field, or API.

The history provides a complete audit trail of every deal's journey through the pipeline, useful for compliance, performance review, and process improvement.

10. Role Center Cue Part

The Sales Pipeline Board includes a Cue Part that can be added to any Role Center for at-a-glance pipeline visibility.

Cue	Description
Open Deals	Count of all active deals currently on the board.
Pipeline Value	Total value of all active deals.
Stale Deals	Count of deals that have exceeded their warning or critical thresholds.
Won This Month	Count of deals moved to the Won stage during the current calendar month.
My Open Deals	Count of active deals assigned to the current user's salesperson code.

To add the Cue Part, personalize your Role Center page and add the Sales Pipeline Board Cues part. Each cue is clickable and drills into a filtered list.

11. Support & Contact

For documentation, release notes, and support requests, visit www.ProAppsLabs.com/support.

For developer reference including codeunits, table schemas, JSON payloads, and integration patterns, see the Sales Pipeline Board Technical Reference.

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