Pipedrive, button by button, for steps 4 to 15

10 November 2026. The trial was not changed. Stripe takes the money. Xero keeps the books. A deal starts only when the tradie agrees to a live presentation. Until then they are a lead.

Pipedrive has no URL field type. It has 16 field types. The one for a link is **Text**. A URL typed into a Text field opens when you click it. Large text cannot be shown on a deal card. Do not put client links in notes.

Fields to create

Account menu, upper right. **Personal preferences**, then **Data fields**. One older page says **Company settings**, then **Data fields**. Click the object, then **+ Custom field**. Name it, choose the type, and save. You cannot change the type later.

Create these on the **organization**. They belong to the business, so they exist before a deal and stay after conversion. The organization stays linked. You do not copy them.

Field name	Type	Filled	A10, as of now
Sample site URL	Text	Step 4. Replace it when the site is rebuilt.	https://a10-property-maintenance-demo.pages.dev/
Preview email URL	Text	Step 4, when Boss approves the email.	https://house10x-preview-emails.pages.dev/a10-property-maintenance-demo/
Business card URL	Text	Before the presentation. A10 already has one.	https://a10-property-maintenance-card.pages.dev/
Intake form URL	Text	Step 9, when the form is ready to send.	Empty until then.
Domain	Text	Step 10, the one name Boss has approved.	Empty.
ABN	Text	Step 5 or 6, after the ABR check.	Empty until the call.
Enquiries go to	Single option: Email, SMS, Their software	Step 10, from the form.	Empty.
Google profile	Single option: Verified, Left for later	Step 12.	Empty.

Also the built-in organization **Website** field. The import guide lists it. Leave it empty until step 11, then put the live site there. The field-types page does not describe Website. If it is not on the screen, create a Text field named **Live site URL** instead. Do not fill both.

One **Large text** field on the organization, named **Domain options**. Step 8, the three .com.au names. Large text cannot sit on a deal card.

Create these on **Lead/deal**. Leads and deals share fields, so a value typed on the lead is still there on the deal. These are about this sale.

Field name	Type	Filled
Paid on	Date	Step 6, the day Stripe takes the A$125.
Handover date	Date	Step 14, the day Boss calls and sends the handover.

On the **person**, use the built-in name, phone and email. Fill them on the step 5 call. No link fields on the person.

Deal value. When you convert the lead, type **77** and AUD. That is the monthly fee, not the first charge.

Products, optional. A product holds a price. It does not charge the card. At step 6 you may add **Website care**, 77, monthly, and **Domain, 3 years**, 48, once. Stripe Checkout is still what the client pays.

Files, not links. Use the file upload in the composer, or the **Files** tab. Tradie Benefits PDF at step 6. Paid invoice PDF at step 7. Files stay attached when a lead becomes a deal.

Email templates. Custom fields can be inserted into email templates and Smart Docs. Boss still presses send. Mail synced onto the person is **Growth**.

Sidebar. On the deal, click **…** then **Customize summary** if you want Paid on and Handover date in the left column. Organization fields are edited on the organization. Click the organization name. Do not type the links again on the deal.

Pipeline cards. Open **Deals**. Click the pipeline dropdown and choose **Customize deal cards**. Add up to seven fields. Text is allowed. Large text is not. Save. This is per person and per pipeline.

- Website sales cards: Sample site URL, Business card URL, ABN.
- Website onboarding cards: Domain, Website (or Live site URL), Enquiries go to.

The Leads Inbox has no deal cards. Open the lead and use the **Organization** section. Click a link to open it.

Automations, Growth only. Do not let an automation rewrite a URL. When the stage becomes **30-day check**, schedule a **Call**. The API can post a stage change to the tracker on any plan. The webhook button inside an automation is Growth and higher.

What carries over. Convert to deal keeps the person, the organization, the notes and the files. Lead/deal fields are the same fields. The three links live on the organization, and the organization stays linked.

Where A10 is clicked

If A10 is already a deal, open it. Top right, **…**, then **Convert to a lead**. Or drag the card to **Move to**, choose **Leads**, and click **Save**. Do this before the first call. A sample site is not a relationship. Organization name: **A10 Property Maintenance**. Leave **Website** empty. There is no current website.

Step 4. Preview email

Still a lead. Not a deal.

1. Open **Leads Inbox** and open A10.
2. In the **Organization** section, click the organization name.
3. In **Sample site URL**, paste https://a10-property-maintenance-demo.pages.dev/
4. In **Preview email URL**, paste https://house10x-preview-emails.pages.dev/a10-property-maintenance-demo/
5. In **Business card URL**, paste https://a10-property-maintenance-card.pages.dev/ if the card is already made. If not, leave it until step 6.
6. Set the lead label to **Sample ready**. A new label is **+ Add new label**.
7. Do not type the links into **Notes**.

Jefferson approves the email by hand. Pipedrive does not build it. No Stripe and no Xero.

Step 5. First sales call

Same lead.

1. In the composer, schedule an activity. **Title:** First call. **Type:** Call. Do not paste the links into the activity note.
2. On the day, open the lead, click **Preview email URL**, and send or text that page.
3. Open the person, or add one. Type name, phone and email into the built-in person fields.
4. On the organization, type the ABN into **ABN**, and correct the name if needed.
5. Mark the call **done**.
6. No answer, or no booking: schedule another **Call**. After three calls, label **Not interested** or **Try later**.
7. Not interested: bottom left, **Archive**. The sample stays up until Boss takes it down. No Stripe.
8. They agree to a presentation: bottom left, **Convert to deal**. Pipeline **Website sales**, value **77** AUD, then **Save**. The lead leaves the inbox. Put the deal in **Presentation booked**.

Jefferson makes the call. Pipedrive keeps the fields. Synced email is Growth. No payment yet.

Step 6. Presentation

Open **Deals**, choose **Website sales**, and open A10.

1. Activity icon, or the **Activity** tab. **Title:** Presentation. **Type:** Meeting. The Meet link may go in the activity note. It is a one-off address, not a client link.
2. Check **ABN**. The ABR check is outside Pipedrive.
3. Fill **Business card URL** if it is still empty.
4. Click **Business card URL** and **Sample site URL** during the meeting.
5. Upload the Tradie Benefits PDF from the composer or the **Files** tab.
6. If they do not pay, drag the card to **Awaiting payment** and schedule a follow-up **Call**. After three tries, **…** then **Convert to a lead**, or mark the deal **Lost**. Lost takes it off the board. The page that names the exact Won and Lost buttons did not load.
7. If they pay, send Stripe Checkout yourself. First charge **A$125** (A$48 plus A$77). Then Stripe charges **A$77** every month. Pipedrive cannot do that charge.
8. Set **Paid on** to that day.
9. Optional: add the two products. They do not take the money.
0. Xero receives the payment from Stripe. Do not also create an invoice inside Pipedrive.

Step 7. Paid invoice

1. Open the deal.
2. Under the progress bar, click the pipeline and stage. Choose **Website onboarding** and **Invoice sent**.
3. Check ABN, the organization name, and the person’s email. If one is missing, stop and ask Boss.
4. Prepare the paid invoice from the Stripe payment. Boss says yes, then send it.
5. Upload that PDF on the **Files** tab.
6. Do not start a second subscription.

Step 8. Domain check

Stage **Domain check**. On the organization, type the three .com.au names into **Domain options**. Do not buy one. Jefferson does the check. Nothing is automatic.

Step 9. Intake form

Stage **Intake sent**.

1. Paste the form link into **Intake form URL**.
2. Boss sends the email or the text. On Growth, a template can insert that field. He still presses send.
3. Schedule tasks for day 2, day 5, and day 7 (“Tell Boss, no form”). On Growth, one automation can create them. On Lite, add them by hand.
4. Do not move to Building. The form is not back.

Step 10. Build

Stay in **Intake sent** until the form arrives. Tally tells you. Pipedrive does not see Tally. When the form is back, drag the card to **Building**.

1. Set **Enquiries go to**.
2. Type the chosen name into **Domain**. Do not buy it. If they already own a domain, use that name.
3. If the form clashes, stop and ask Boss.
4. When the new sample is approved, replace **Sample site URL**. Do not keep the old value.
5. Boss clicks **Sample site URL** and sends the preview. One round of changes, then replace the field again.
6. Move the stage only when Boss says this version is okay.

Step 11. Domain and hosting

Stage **Live**. Read **Domain** and nowhere else. Register the .com.au in the tradie’s name and ABN, or point a domain they already own. Pipedrive cannot register a domain. When it is live and Boss has tapped Call on his phone:

1. Put the live address in **Website**. If that field is missing, use **Live site URL**.
2. Replace **Sample site URL** with the same live link, so nobody opens the demo by mistake.
3. Move the stage only after HTTPS works and the phone link is right.

Stripe is unchanged.

Step 12. Google profile

Stage **Google**. The client owns the profile. Boss does not claim it. Set **Google profile** to **Verified** or **Left for later**. You may move the stage either way. The map and the live reviews are a website change, not a Pipedrive change.

Step 13. Test

Stage **Tested**. Send one test through the quote form. It must arrive at **Enquiries go to**. For A10 that is email, unless the form said otherwise. There is no Book Now into ServiceM8. Jefferson checks the inbox, then moves the stage.

Step 14. Handover

Stage **Handed over**.

1. Click **Business card URL** and **Website**. Both must open.
2. Boss rings, then sends the celebration email. On Growth, the template can insert the fields. He still presses send.
3. Set **Handover date** to today.
4. Move the stage.

Step 15. 30-day check

Stage **30-day check**.

1. Schedule a **Call** due 30 days after **Handover date**. On Growth, the automation does this. On Lite, add it by hand.
2. Boss rings and sends the report email and the referral email. Mark the call **done**.
3. Referrals go back to sourcing as new organizations and leads, not as deals.
4. No answer: one more **Call**, then Boss may close it.
5. Mark the deal **Won**. It leaves the active pipeline. Stripe keeps charging A$77. Later monthly checks are a **Call** on the organization, not a new deal.

Not interested, at any step

Before a deal: label **Not interested**, then **Archive**. After a deal and before payment: mark **Lost**, or **…** then **Convert to a lead**. After payment: Boss approves a Stripe refund. A refund is not a link, so a note of the refund date is acceptable. Xero records the refund from Stripe.

What Pipedrive cannot do

It cannot build the site, send the Stripe charge, register the domain, run the ABR check, own the Google profile, or see a Tally form. It cannot show Large text on a deal card. It has no URL field type. Lite cannot sync email or book the day-2 reminder and the 30-day call for you.

Setup Jefferson approves

1. Growth, one seat, so email sync and the stage automations exist.
2. Create the organization fields and the two lead/deal dates above. No link goes in a note.
3. Two pipelines: **Website sales** (Presentation booked, Awaiting payment) and **Website onboarding** (Invoice sent through 30-day check).
4. Customize the deal cards as above.
5. A10 starts as a lead, with the three links in the three Text fields.
6. Stripe Checkout at the presentation. Xero records it. Pipedrive stores Paid on, the files, and the stage.

Gaps

The Won and Lost click-path page returned a 404. The deals guide says a deal ends WON or LOST, and that takes it off the active board. The add-lead button name was not on the pages that loaded. Website is on the import guide

and is not described on the field-types page. The public price page showed US dollars (Growth US$39 per seat per month, billed yearly). An Australian check on 4 October 2026 recorded Growth at A$69 a month, or A$49 if paid yearly, GST extra.

Sources

- Field types: https://support.pipedrive.com/en/article/what-types-of-custom-fields-are-there
- Custom fields: https://support.pipedrive.com/en/article/custom-fields
- Import fields, including Website: https://support.pipedrive.com/en/article/import-fields
- Deal cards: https://support.pipedrive.com/en/article/deal-card-customization-sorting
- Leads Inbox: https://support.pipedrive.com/en/article/leads-inbox
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