Superfly Distilling Co.

Brevo CRM — Setup & Operations Guide

OR Liquor Control • CA 3-Tier • rev 5 • June 1, 2026

What this guide is

This is the current, accurate setup guide for the Brevo CRM as it actually runs today. It supersedes the April 28 guide (rev 2), the May 6 guide (rev 3), and the May 31 guide (rev 4).

Read order if you're new to this CRM: this guide top to bottom. Read order if you're maintaining it: jump to Section 8 (gotchas) before doing any import work.

What changed from rev 4

- Automation strategy was overhauled. The stale-lead daily digest is OUT — Brevo's automation engine fires per-contact, not as a batch report, so a digest isn't possible without burning email allowance on internal alerts. Replaced with a saved filter you check manually.
- New core rule: 'If the email goes to YOU, don't build the automation. If it goes to a CUSTOMER or LEAD, build it.' Internal nudges should be saved filters, pinned views, calendar reminders, or Brevo's free Tasks page — never emails to yourself that consume your monthly send allowance.
- Five outbound automations added: OR High-Priority Welcome Sequence, Sample-Sent Follow-Up, OR Active Pour Reorder Reminder, CA Reorder Reminder, Quarterly Re-Engagement to Lost/Dormant.
- Two zero-email automations added: Auto-bump priority on engagement, Auto-move to Dormant after 365 days. These update internal data without sending any email.
- Per-segment outreach playbook added (Section 9) — what messaging fits which segment, plus a 30-day launch plan.

What changed from rev 3 (still relevant)

- ENTITY_TYPE was renamed to Account Type everywhere. The field still classifies a record as Liquor Store, Bar / Restaurant, or Distributor — only the label changed.
- No custom contact attributes. Classification lives on the Company (and is mirrored on the Deal for kanban filtering). Contacts hold person-level fields only — name, email, phone, linked company.
- Deals are imported in 4 batches, one per pipeline+stage combination.
- Won-stage deals require both an Amount and a Close Date.
- Company-to-deal linking is manual after import. Contacts auto-link to companies via the Business name field at import.
- ACS is no longer treated as a distributor. Active distributors are NCM and Wonderland only.

1. Pipeline architecture

Two pipelines, organized by how each state's spirits distribution actually works:

- OR Liquor Control — Oregon. The OLCC controls all spirits sales, so contacts here are OLCC store agents (Liquor Store) and on-premise accounts (Bar / Restaurant).
- CA 3-Tier — California. Three-tier system means producer → distributor → retail/on-premise. Pipeline contains distributors (NCM, Wonderland) plus the retail and on-premise accounts served through them.

Both pipelines use the same 7 stages so reports work across both:

1. Not Contacted
2. Contacted
3. Sample Sent
4. Tasting / Meeting
5. Negotiating
6. Active Customer (thumbs-up / Won)
7. Lost / Dormant (thumbs-down / Lost)

Won and Lost are Brevo's last-two-stages convention. Active Customer must be flagged as Won (thumbs-up, 100% probability). Lost / Dormant must be flagged as Lost (thumbs-down, 0% probability). Set this when you create each stage — it's easy to miss.

Account Type classification

Account Type lives on the Company (canonical) and on the Deal (mirrored for kanban filtering). Allowed values: Liquor Store, Bar / Restaurant, Distributor.

Final population after import:

- Liquor Store: 385 companies (OLCC stores in OR, retail accounts in CA)
- Bar / Restaurant: 18 companies (OR on-premise, all currently carrying)
- Distributor: 2 companies (NCM, Wonderland — CA only)

2. Attributes — what to create where

Brevo keeps attributes in three separate lists: Company, Contact, and Deal. Creating an attribute on one entity does NOT carry it to the others. Create attributes before importing data; otherwise Brevo auto-creates them as Text type and you can't convert Text → Category afterward without deleting the data first.

Company attributes (5 custom)

Go to Companies → Settings → Company attributes. Create these:

Name	Type	Values

Account Type	Category	Liquor Store, Bar / Restaurant, Distributor
Priority	Category	High, Medium, Low
Currently Carries	Category	Yes, No
Source	Text	(free text)
Notes	Multi-line text	(free text)

Brevo's built-in Company fields cover everything else — do NOT recreate them. Use:

- Company name (built-in) for the store/bar name
- Address, City, State, Zip code (built-in)
- Landline phone number (built-in) for general phone
- Email, Website (built-in)
- Owner — leave Brevo's user-lookup Owner field alone; track external store-agent names in Notes if you need them on the card

Deal attributes (5 custom — same as Company)

Go to Deals → Settings → Deal attributes. Create the exact same list with the exact same names and types:

Name	Type	Values
Account Type	Category	Liquor Store, Bar / Restaurant, Distributor
Priority	Category	High, Medium, Low
Currently Carries	Category	Yes, No
Source	Text	(free text)
Notes	Multi-line text	(free text)

Why mirror them on Deals? Brevo's kanban only filters on Deal attributes, not Company attributes. Mirroring Account Type / Priority / Currently Carries onto the deal lets you filter the kanban by 'show only Bar / Restaurant deals in OR currently carrying us.' Source and Notes are mirrored for consistency at import time.

Brevo's built-in Deal fields handle the rest. Use:

- Deal name (built-in)
- Pipeline + Stage (system-managed — set at top of import wizard, not as columns)
- Amount (built-in)
- Close date (built-in)
- Owner (built-in — used for sales rep assignment)
- Deal description (built-in — optional)

Contact attributes (zero custom)

Do not create any custom contact attributes. Classification lives on the Company and the Deal, not on the person. Contacts hold only:

- Email (built-in)
- First name, Last name (built-in)
- SMS — Brevo's marketing-SMS field; phone numbers must be E.164 (+1XXXXXXXXXX)
- Phone — Landline phone number (built-in) for general phone
- Company link — set automatically when you import contacts with a matching COMPANY value

> If you want to email 'all contacts at bars in OR currently carrying us,' build that list filter on the linked Company's attributes. You don't need to duplicate Account Type, Priority, or Currently Carries onto the contact.

3. Import workflow — order and batches

The order matters. Import Companies first, then Deals in 4 batches, then link Active Customer deals to companies by hand. Contacts can be uploaded at any point because they auto-link to Companies by name.

Files in the working folder

- 00_MASTER_Reference.csv — all 405 records with every field. For reference only; do not import this file.
- 01_Contacts.csv — 328 contacts with email (318 unique + 10 co-owner duplicates kept on purpose).
- 02_NoEmail_Contacts_Reference.csv — 77 records without email, for reference.
- 03_Companies.csv — 405 companies. Import this first.
- 04_Deals.csv — 405 deals, full master. For reference; you don't import this directly.
- A_OR_NotContacted.csv — 331 OR liquor stores. Import as Batch A.
- B_OR_ActiveCustomer.csv — 18 OR bars/restaurants with Amounts and Close Dates. Import as Batch B.
- C_CA_NotContacted.csv — 40 CA warm leads. Import as Batch C.
- D_CA_ActiveCustomer.csv — 16 CA accounts (14 retail at $500 each, NCM and Wonderland at $5,000). Import as Batch D.
- 05_Find_a_Bottle_or_Pour_LocateStore.csv — public-facing locator data. Not for Brevo; this syncs to LocateStore for the website.

Step 1 — Import Companies (03_Companies.csv)

Upload the file. In the wizard, map columns to fields:

CSV column	Brevo field
NAME	Company name (built-in)

ACCOUNT_TYPE	Account Type (custom Category)
CITY, STATE, ZIP, ADDRESS_STREET	matching built-in address fields
PHONE	Landline phone number (built-in)
EMAIL	Email (built-in)
WEBSITE	Website (built-in)
PRIORITY	Priority (custom Category)
CURRENTLY_CARRIES	Currently Carries (custom Category)
SOURCE, NOTES	Source, Notes (custom)

Skip OWNER, TIER, STAGE if those columns exist — they don't apply to the company side. Toggle 'Use company name to update existing' on so re-runs don't create duplicates.

Expected result: 405 companies imported. If you see 397, check for special characters in 8 company names — short names like 'NCM' or names with '#' or parentheses sometimes get rejected. Re-upload just those rows.

Step 2 — Import Deals in 4 batches

Brevo's deal wizard sets one pipeline and one stage per import, so split the deals into 4 files. Each file is pre-filtered.

> CRITICAL: At the TOP of each wizard run, set Pipeline and Stage manually. The wizard does NOT read these from CSV columns. Get this wrong once and all 331 deals land in the wrong pipeline.

Batch A — A_OR_NotContacted.csv (331 deals)

- Wizard top: Pipeline = OR Liquor Control, Stage = Not Contacted
- Map: DEAL_NAME → Deal name; ACCOUNT_TYPE → Account Type; PRIORITY → Priority; CURRENTLY_CARRIES → Currently Carries; SOURCE → Source; NOTES → Notes
- Skip: LINKED_COMPANY (no target field); AMOUNT (blank for these — fine); CLOSE_DATE (blank — fine); CITY, STATE (skip unless you added deal-side city/state attributes)
- Run import.

Batch B — B_OR_ActiveCustomer.csv (18 deals)

- Wizard top: Pipeline = OR Liquor Control, Stage = Active Customer
- Same column mapping as Batch A.
- Amount column is pre-populated with annual run-rate based on March 2026 OLCC bottle counts. Range: $240–$1,920.
- Close date is pre-populated in DD-MM-YYYY format (13-05-2026). Brevo rejects YYYY-MM-DD, MM/DD/YYYY, and DD/MM/YYYY — only DD-MM-YYYY works.
- Run import. All 18 land directly in the Won column.

Batch C — C_CA_NotContacted.csv (40 deals)

- Wizard top: Pipeline = CA 3-Tier, Stage = Not Contacted
- Same column mapping. Amount blank, fine.
- Run import.

Batch D — D_CA_ActiveCustomer.csv (16 deals)

- Wizard top: Pipeline = CA 3-Tier, Stage = Active Customer
- Same column mapping.
- Amount is pre-populated: $5,000 for NCM and Wonderland; $500 for the 14 retail accounts.
- Close date in DD-MM-YYYY.
- Run import. All 16 land directly in the Won column.

End state after all 4 imports:

- OR Liquor Control: 331 Not Contacted + 18 Active Customer = 349 deals
- CA 3-Tier: 40 Not Contacted + 16 Active Customer = 56 deals
- Total: 405 deals, every attribute populated, every deal in the correct pipeline and stage.

Step 3 — Link Active Customer deals to companies (manual, ~5 minutes)

Brevo's deal import does not support company linking. Do this only for the 34 Active Customers — skip the 371 Not Contacted (link those as you contact them so the work spreads over time).

8. Open Deals → filter Stage = Active Customer.
9. Click a deal. Scroll to Associated Companies → Add company.
10. Search the company name and select it.
11. Repeat for all 34. About 8 seconds per deal.

Step 4 — Import Contacts (optional, when ready)

Upload 01_Contacts.csv. Map EMAIL → Email; FIRSTNAME → First name; LASTNAME → Last name; PHONE → Landline phone number; SMS → SMS (E.164 format); COMPANY → Company (built-in linker field, matches by name to your already-imported companies).

Brevo dedupes contacts by email. The 10 co-owner duplicates are intentional (two people, one business email is one of theirs).

4. Adding sales users and assigning deals

Brevo charges per user on most plans. Confirm seat count before inviting.

Invite users

12. Go to My Account → Users → Invite a user.
13. Enter email address. Brevo sends them a setup email.
14. Set role: Owner (full admin) or User (limited). For sales reps, User role with deal-edit permissions is typical.
15. Repeat for each rep.

Assign deals by Owner

Once users accept their invitations, their names appear in the Deal Owner dropdown.

Default territory split (adjust to your reps' actual coverage):

- Rep A: Southern OR (Brookings region) + all CA — roughly 225 deals.
- Rep B: Northern + Central OR — roughly 180 deals.
- You (admin): unassigned safety net for everything that doesn't fit the split.

Bulk assign:

16. Deals → filter to the rep's territory (e.g., Pipeline = OR Liquor Control AND City contains list of southern OR cities).
17. Select all → Bulk edit → Owner = (rep name) → Apply.
18. Repeat for the other rep's filter.

5. Segments to build (Contacts → Lists)

Brevo separates marketing lists from the deal pipeline. Lists are what email campaigns send to. Build these as filter-based lists so they auto-update as deal stages and attributes change.

The 5 daily-use segments

19. OR Prospects — Pipeline = OR Liquor Control AND Stage = Not Contacted AND Account Type = Liquor Store. Your largest cold-trade list for OLCC outreach.
20. OR Active Pours — Pipeline = OR Liquor Control AND Account Type = Bar / Restaurant AND Stage = Active Customer. The 18 OR bars currently carrying.
21. CA Warm Leads — Pipeline = CA 3-Tier AND Stage = Not Contacted. Retail accounts already on NCM or Wonderland's books but not yet ordering Superfly.
22. CA Active — Pipeline = CA 3-Tier AND Stage = Active Customer. The 14 retail accounts plus NCM and Wonderland.
23. High Priority Open — Priority = High AND Stage != Active Customer AND Stage != Lost / Dormant. Anything urgent across both pipelines.

6. Automations — what to build, what NOT to build

The governing rule, learned the hard way:

> If the email goes to YOU, don't build the automation. Use a saved filter, a pinned view, a calendar reminder, or Brevo's free Tasks page. If the email goes to a CUSTOMER or LEAD, build the automation — that's real outbound work it's doing for you, and it's what your monthly email allowance is for.

Brevo's automation engine fires per-contact / per-deal — it cannot compile a digest list across records and send one summary email. So 'email me every morning with my stale leads' is not actually possible without either spamming you with one email per stale deal, or using a saved filter instead. Saved filters are free.

Outbound automations to build (in priority order)

1. OR High-Priority Welcome Sequence
Trigger: a contact is added to the 'OR High Priority' segment.

Workflow:

- Day 0 — Intro email: 'Hi from Superfly, here's who we are and why we made this.'
- Day 7 — Brand story email: short note from the distiller, links to the cocktail page.
- Day 14 — Sample offer: 'Would you like a sample for evaluation? Reply to this email.'

Why it's worth it: replaces three manual emails per new prospect. If you add 20 priority prospects per month, this saves 60 emails of repetitive work and never forgets the timing.

2. Sample-Sent Follow-Up
Trigger: a deal moves to Sample Sent stage.

Workflow:

- Day 3 — 'Got the bottle? Let me know if you have any questions.'
- Day 10 — 'What did you think? Open to setting up a quick call?'
- Day 14 — Auto-action with no email: set Priority = High AND create a task on the Owner for personal follow-up.

Why it's worth it: every sample sent needs follow-up, and the timing is what closes deals. You will forget; the automation won't.

3. OR Active Pour Reorder Reminder
Trigger: an OR Active Customer deal has no activity logged in 60 days.

Workflow: single email to the bar contact — 'Running low? Let us know if you want a tasting refresher or to schedule a fresh case delivery.'

Why it's worth it: bars churn through inventory faster than retail. A passive reminder captures reorders that would otherwise quietly stall.

4. CA Reorder Reminder
Trigger: a CA Active Customer deal has no activity logged in 90 days.

Workflow: single email to the store contact — 'Hope Superfly is moving well. Easy to reorder through NCM or Wonderland — want a fresh sample pack or shelf-talker materials?'

Why it's worth it: same logic as #3, longer window because retail moves slower. Distributor reorders are the actual revenue here.

5. Quarterly Re-Engagement to Lost / Dormant

Trigger: a contact is in the 'Dormant' segment AND it's been 90 days since the last campaign sent to them.

Workflow: single email — 'Hey, it's been a minute. Here's what's new at Superfly. Would you like to try a fresh sample?'

Why it's worth it: low effort to recover 5–10% of lost contacts. People change roles, change minds, or just need a second touch.

Zero-email automations (free to run, no allowance hit)

These update internal data without sending any email. Worth building because they keep your CRM clean without manual maintenance.

A. Auto-bump priority on engagement

Trigger: a contact opens 2+ campaigns in 60 days.

Action: set Priority = High on the contact's linked company. No email sent.

Why: turns email engagement into a hot-lead signal automatically. Your highest-engaging contacts surface in the High Priority Open segment without you reading every campaign report.

B. Auto-move to Dormant after 365 days

Trigger: a deal is in Active Customer stage AND has had no activity for 365 days.

Action: move the deal to Lost / Dormant. No email sent.

Why: prevents Won customers from quietly aging out and inflating your 'active' count. The next outreach cycle treats them as fresh prospects.

Do NOT build these (internal nudges that waste email allowance)

- ☐ Stale-lead daily digest to yourself. Replace with a saved filter — see below.
- ☐ 'Check this segment' reminder to yourself. Use a recurring calendar event on your phone.
- ☐ Monday morning summary email. Calendar event.
- ☐ Daily task overdue alert. Brevo's Tasks page already shows this with a count badge — no email needed.
- ☐ 'You have N new leads' notification. Check Brevo when you sit down to work.
- ☐ Per-deal stale alerts. With 50+ open deals at any time, this would dump dozens of emails into your inbox in batches.

The saved filter that replaces the stale-lead digest

Instead of automating, build a saved filter and check it on a schedule:

24. Deals → Filter (top of the deals list) → New filter
25. Conditions: Stage is not Active Customer AND Stage is not Lost / Dormant AND Last Modified is more than 30 days ago.
26. Save the filter as 'Stale Leads'. It appears in your filter dropdown / sidebar.

27. Add a recurring event to your phone calendar: 'Monday 8:30am — open Brevo, check Stale Leads filter.'

Zero emails sent, same outcome. If you graduate to the point where you want Brevo to proactively flag stale deals without you remembering to check, the next-best option is to convert the digest idea into a task automation: when a deal becomes stale, auto-create a Brevo Task on the deal Owner. Tasks are internal and free (no email allowance hit), and they pile up in the Tasks page with a count badge.

7. Weekly cadence

- Monday: filter Deals by Priority = High AND Stage != Active Customer. Work the top of that list before anything else.
- Wednesday: review CA Warm Leads. Pick 5 to push through NCM or Wonderland for sample orders.
- Friday: log every contact you touched this week (call, email, sample, visit). Update Next Follow-Up dates on every open opportunity.
- Monthly: pull the Pipeline Value by Stage report. Look for stages where deals are piling up — that's where the funnel is leaking.

8. Per-segment outreach playbook

Don't blast all 320 contacts the same way. Each segment is at a different stage and needs different friction. This section maps each segment to its strategy, cadence, and trigger-to-call rule.

The strategic frame

- Hot side (~45 contacts: 18 OR bars, 14 CA retail, NCM, Wonderland, ~11 high-engagement prospects). These are relationships. Email is supporting cast — real progress comes from visits, calls, and tastings. Email keeps you top-of-mind between in-person touches.
- Warm side (~115 contacts: 40 CA prospects + ~75 high-priority OR prospects). Email does the real work here. They could buy if you pitched well; sample-driven sequences move them.
- Cold side (~160 untouched OLCC store agents). Email is your primary tool because the math doesn't work otherwise — you can't call every OR store. A well-built drip earns the 5-10% who reply.

OR Active Pours (18 bars/restaurants)

Goal: keep them pouring, get additional SKUs placed, prevent churn.

- Cadence: monthly 'what's new' email + quarterly seasonal push (holiday cocktail menu before Thanksgiving, summer pour before Memorial Day).
- Personal layer: top 5 by volume get a short personal note quarterly.
- Trigger to call: 60 days no reorder activity → automation #3 fires + creates a task.

CA Active Retail (14 stores)

Goal: nudge reorders, drive sell-through.

- Cadence: monthly reorder reminder with a single product spotlight; quarterly sample of any new release.
- Trigger to call: 90 days no activity → automation #4 fires + creates a task.

Distributors — NCM & Wonderland (2)

Goal: stay top-of-mind with their reps so they actively sell you in.

- Cadence: monthly 1:1 email to specific reps; quarterly in-person visit.
- This is account management, not marketing. Don't bulk-include them in newsletters — they get personal touches only.

CA Warm Leads (40 prospects)

Goal: get them to place a sample order through their existing distributor.

- Cadence: quarterly 'you're already 1 click away' email with a clear CTA — call NCM or Wonderland and ask for Superfly.
- If three quarterly emails fire with no movement, downgrade Priority to Low and stop emailing.

OR High-Priority Prospects (top 50–75 OLCC stores)

Goal: get them to request a sample.

- Cadence: 3-email welcome sequence (intro, brand story, sample offer) spaced 1 week apart — automation #1.
- After the sequence completes: monthly newsletter rhythm.
- Trigger to call: opens 3+ emails without replying → personal outreach call from you.

OR Standard Prospects (remaining ~256)

Goal: low-effort awareness; convert the 5-10% who self-identify.

- Cadence: monthly newsletter only. No personal touches yet.
- They earn personal attention by opening or clicking. Automation A (auto-bump priority on engagement) catches this — when a contact opens 2+ campaigns in 60 days, they bump to High Priority and a task is created for you to call.

Email content pillars — rotate, don't repeat

28. Product education — small-batch process, hand-finished and hand-labeled in Brookings, why potato vodka has the texture it does.
29. Recipes & cocktails — link to the cocktail page on the website to drive traffic.
30. From the bar — short stories, drink specials, and events at Superfly Martini Bar & Grill (the brand's home base in Brookings). Makes the brand feel alive.
31. Trade-only intel — new release, award, batch info, distribution updates.

32. Seasonal pour — holiday menus, summer cocktails, Cinco de Mayo, July 4.
33. Owner voice — a short quarterly note from the current owners. Steward voice ("here's what we're doing to protect what's already great"), not founder voice. The recipe and the bar predate current ownership; honor that continuity instead of overclaiming.

Build a content calendar where one campaign goes out to one segment per weekday. That gives you 4-5 emails per week across the CRM without overloading any single contact.

30-day launch plan

Week 1

- Finish setup: invite reps, assign Deal Owners, build the 5 segments, build the saved 'Stale Leads' filter.
- Send first 'All trade' newsletter — a single intro: 'Hi from Superfly, here's what we're up to in Q3.'

Week 2

- Build the OR High-Priority Welcome Sequence (automation #1).
- Send welcome email #1 manually to your top 50 OLCC store priorities so they start the cycle.
- Block 90 minutes for 10 follow-up calls to anyone who opened or clicked.

Week 3

- Build the Sample-Sent Follow-Up automation (#2).
- Send the first CA Warm Leads quarterly nudge.
- Start the monthly OR Active Pours 'what's new' email.

Week 4

- Build the Engagement-based Priority Bump automation (zero-email A).
- Review opens and clicks from weeks 1-3 — identify the first batch of warmed-up leads to call.
- Schedule the Q4 content calendar: 4-5 campaigns mapped across the next 4 weeks.

After 30 days you'll have: 5 segments live, 3-4 automations running, a content rhythm established, and your first batch of email-engaged leads to call personally.

9. Real-world gotchas — read before importing

These are things learned the hard way during setup. Several are one-way mistakes that take an hour to undo.

Won-stage deals require Amount AND Close Date

If a deal is missing either, it will not move to Active Customer (or any Won-flagged stage). It stays in Not Contacted with no error message. Symptom: 'I imported 16 Won deals but the column shows 0.' Fix: populate both fields before retrying, or use the CSV files in this bundle which already have them.

Date format must be DD-MM-YYYY

Brevo rejects YYYY-MM-DD, MM/DD/YYYY, and DD/MM/YYYY. Only DD-MM-YYYY (e.g., 13-05-2026) works. The CSVs in this bundle already use this format.

Closed/Won deals lock against bulk edit

Once a deal is in a Won-flagged stage, you cannot bulk-edit its attributes from the standard list view. To edit: move it back to an open stage temporarily, edit, then move it back. Or use kanban drag-and-drop, which sometimes bypasses the lock.

Deal import has no Associated Companies field

Brevo's documentation implies you can map a CSV column to Associated Companies during deal import. You can't — that field doesn't appear in the wizard. Link Active Customer deals to companies manually after import (Step 3 above).

Attribute type changes are mostly one-way

Once an attribute has any data on it, Brevo locks its type. You cannot convert Text → Category. If you need to change the type: delete all records using that attribute, delete the attribute, recreate it with the correct type. Or create a new attribute with a different name and migrate data over.

Auto-created attributes default to Text

If you let Brevo auto-create an attribute during import (by mapping to a column it doesn't recognize), it creates the attribute as Text type. You won't be able to convert it to Category later without the steps above. Always create attributes BEFORE importing.

The OWNER trap

If your CSV has an OWNER column with external names (store agents, not Brevo users), Brevo's wizard will try to auto-map it to Deal Owner — which is a user-lookup field. It will silently drop every row where the name doesn't match a Brevo user. Either rename the column to OWNER_EXTERNAL and don't map it, or skip the column during import and put the names in Notes.

Wizard pipeline dropdown can hide options

If you only see one pipeline in the deal edit dropdown, it's because the deal hasn't been saved yet against the other pipeline. Set Pipeline = (the other one) at the top of the wizard, save, then the dropdown shows both. Counter-intuitive but consistent.

Pipeline membership filter

To see which pipeline a deal lives in, filter Deals by 'Pipeline = X.' There's no Pipeline column in the default list view — add it via Manage Columns.

Refreshing the import wizard

If you create a custom attribute mid-import-wizard, it may not appear in the dropdown until you cancel and restart the wizard. Always create attributes first, then start the import.

Deleting attributes requires deleting data first

If you need to drop an attribute, you must first delete every record (deal, company, contact) that has a value for it. Easier path: leave the attribute alone and just stop using it.

Appendix A — Stage cheat sheet

Stage	When to move a deal here	Won / Lost flag
Not Contacted	Default at import. No outreach yet.	—
Contacted	You've emailed, called, or visited at least once.	—
Sample Sent	They've received a bottle for evaluation.	—
Tasting / Meeting	Live tasting scheduled or completed.	—
Negotiating	Discussing order size, pricing, placement.	—
Active Customer	First PO placed or OLCC stocks them.	Won (thumbs-up, 100%)
Lost / Dormant	No after a sample, or Active Customer with no order in 12 months.	Lost (thumbs-down, 0%)

Appendix B — Deal name format

Deal names follow this pattern so kanban cards are scannable at a glance:

[PREFIX] Company Name - City

- [OR-LIQ] — Oregon OLCC liquor store
- [OR-B/R] — Oregon bar or restaurant
- [CA-DIST] — California distributor (NCM, Wonderland)
- [CA-RTL] — California retail account

Appendix C — Amount conventions

Deal Amount is annual run-rate (12 months of expected revenue) — not lifetime-to-date, not single-order.

- OR Bar / Restaurant: bottles per month × $20 wholesale × 12. Source: March 2026 OLCC sales report.
- CA Retail: $500 placeholder until ordering history accumulates.
- CA Distributors (NCM, Wonderland): $5,000 placeholder reflecting ~250 bottles/year through each.
- OR Liquor Store Not Contacted: blank. Amount will be set when they place their first order.

Appendix D — Source documents in this folder

- CLEAN_RESTART_PLAN.md — short operational checklist used to execute the May 13 restart. Reference for re-running the import.
- Brevo_Setup_Guide.docx (April 28) — superseded by this rev 5. Keep for audit history only.
- Brevo_Setup_Guide_2026-05-06_rev3.docx — superseded by this rev 5. Keep for audit history only.
- Brevo_Setup_Guide_2026-05-31_rev4.docx — superseded by this rev 5. Keep for audit history only.
- Wireframer_Find_a_Bottle_Page_Prompt.md — locator page design brief (unrelated to Brevo).
- Wireframer_Cocktail_Page_Prompt.md — cocktail page design brief (unrelated to Brevo).