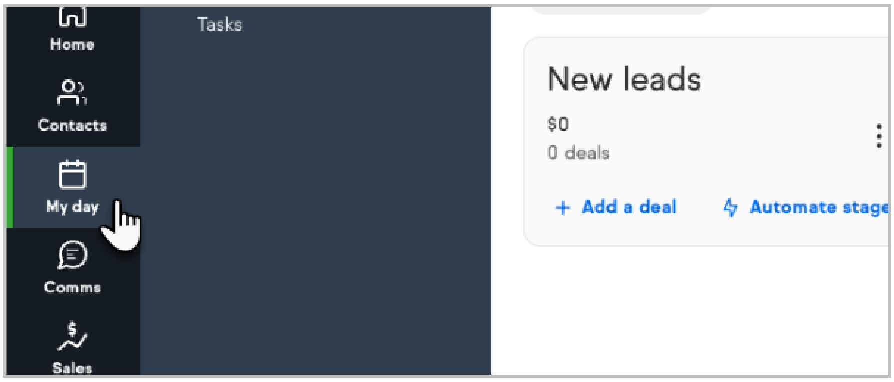
Add a Deal

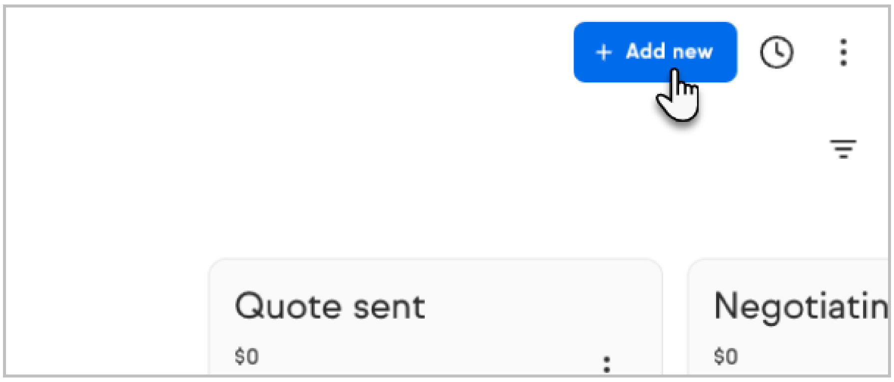
This article applies to:

Pro
Max

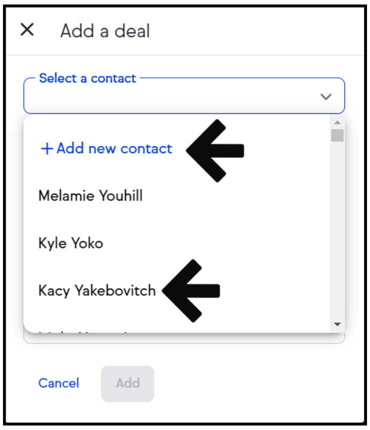
1. To add a new Deal from the Pipeline click**My Day** from the left hand Nav.



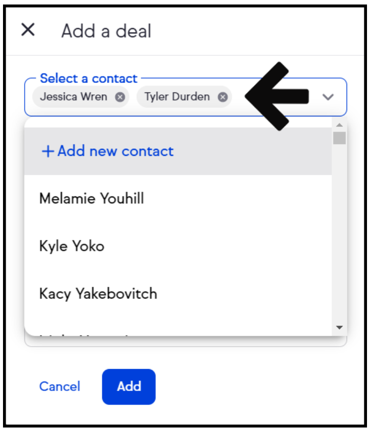
2. When in the pipeline to create a deal click**Add new**



3. Click **Select a contact**, select an existing contact from the drop down list, or click **+Add a new contact** to create a new contact record
Tip: You can start typing the name of your desired contact into the Select a contact field to narrow the drop-down results



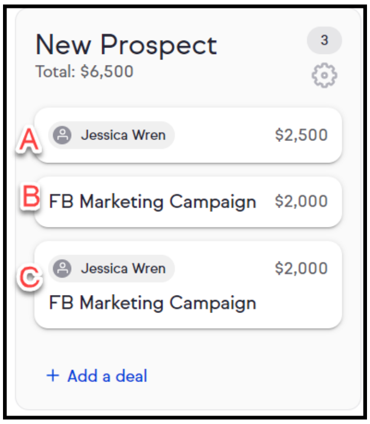
4. You can add multiple contacts to the new deal



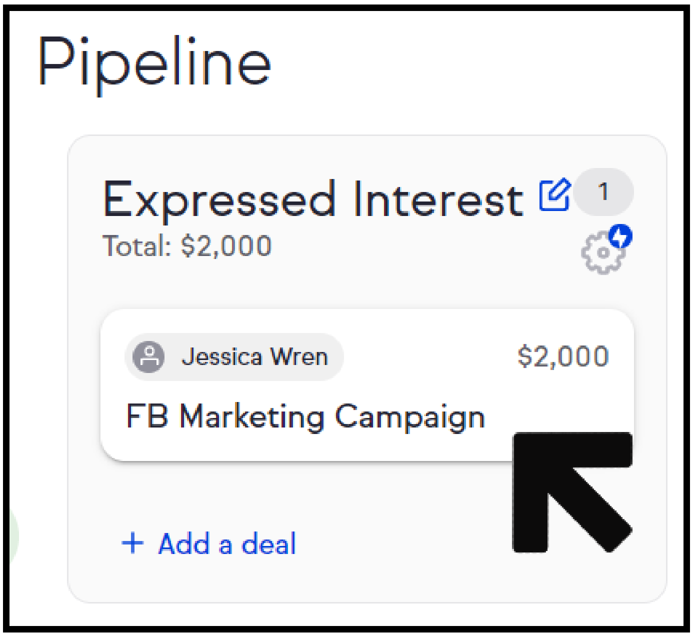
5. Add a **Deal name**, **Deal Value**, and **Notes**. Click **Add** to continue

6.
   A. Deal card has only a contact added and no deal name
   B. Deal card has only a deal name, no contact added
   C. Deal card has both a contact added and a deal name

7.



8. Click on the deal card to open the full view of the deal card or to add or edit details



9. From the full view of the deal card you can:
   A. Edit the deal name and deal value
   B. Move the deal to the next stage
   C. Add more contacts to the deal and an estimated close date
   D. Add more Team members to the deal
   E. Add notes or send an email to the primary contact for this deal