Manage Deals

This article applies to:
Pro
Max

1. **Edit Deal Details**
2. **Delete a Deal**
3. **Move a Deal**
4. **Close a Deal**
5. **FAQ**

### Edit Deal Details

Click on a deal to add notes, send emails, manage the contacts, and manage team members attached to the deal.

![Deal details interface](image)

- **Deal name**: Jessica Wren
- **Deal value (USD)**: 2500
  
  **Current pipeline: Consulting Services Pipeline**

  - **Stage**: New Lead
    - **Move to next stage**

  **Contacts**
  - JW
  
  **Team members**
  - JS
  
  **Close date**
  - Add estimated close date

  **Deal activity**
  - **Wed, Sep 18 2019**
    - Deal moved from Contacting to New Lead by Mychal Edelman 07:40 AM
    - Deal moved from Qualifying to Contacting by Mychal Edelman 07:40 AM

### Delete a Deal

Click the trash can button to delete a deal.
Move a Deal

Click on a deal and drag it over to another stage.

Close a Deal

Deals can be closed from within the Pipeline by clicking and dragging the deal into either a Won or Lost stage.

Or you can close a deal from within the Deal record itself by modifying the Status dropdown.

FAQ

Can deals be exported?
At this time, deals cannot be exported on the front-end or through our database team.