

Manage Deals

This article applies to:

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

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

Notes Email

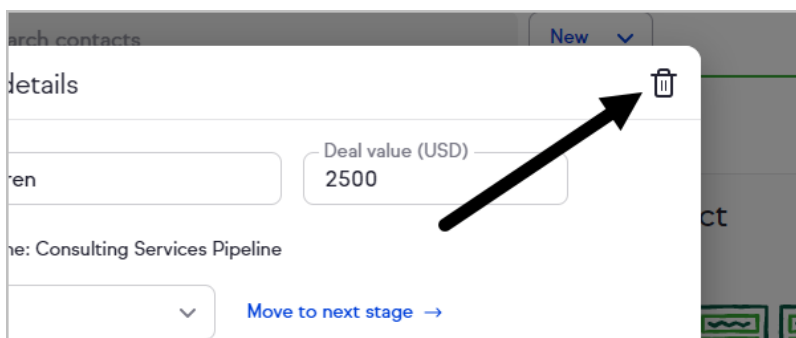
Deal activity

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.

Work being done 2
Total: \$1,500 ...

Another Great Deal
\$0

Name...

Invoice Sent 0
Total: \$0 ...

Fred Jones
\$1,500

Name...