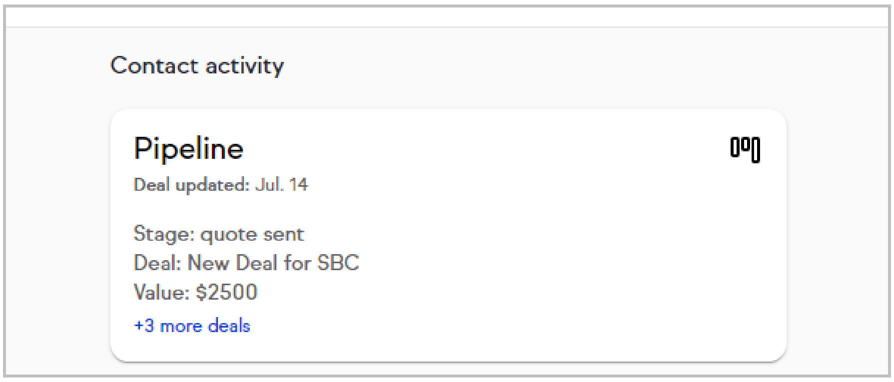
Manage deals from the contact record

This article applies to:

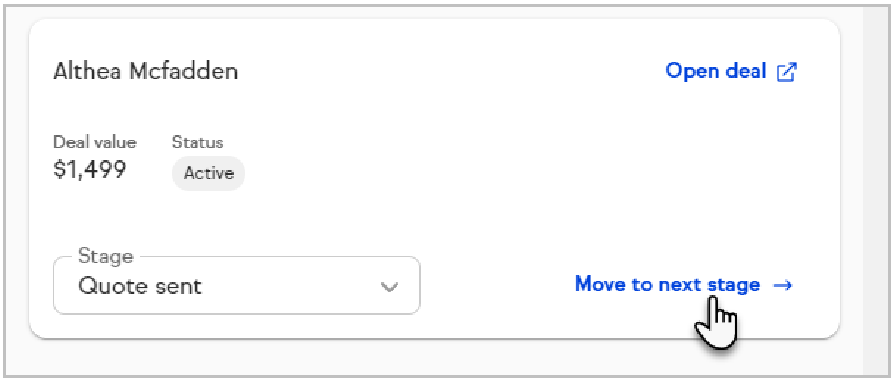
Pro
Max

The Deal card allows you to quickly get the information you need about your customer and their associated deal in an easy-to-find format.

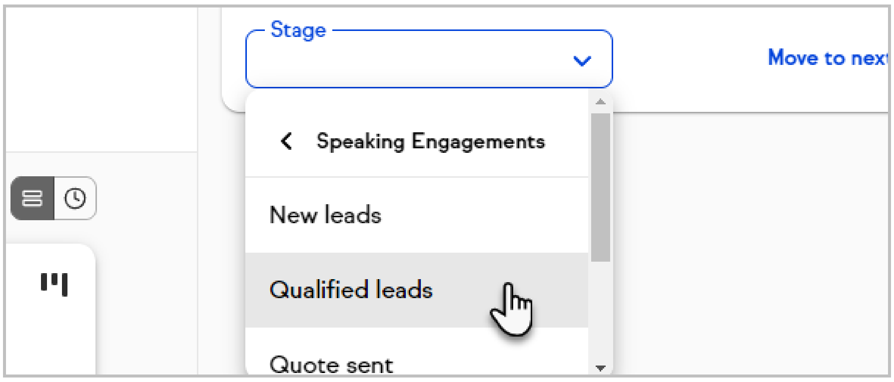
1. Search for a contact that is associated with a deal
2. The Contact record will display a deal card. If multiple deals are associated with the contact it will show a count on the deal card.



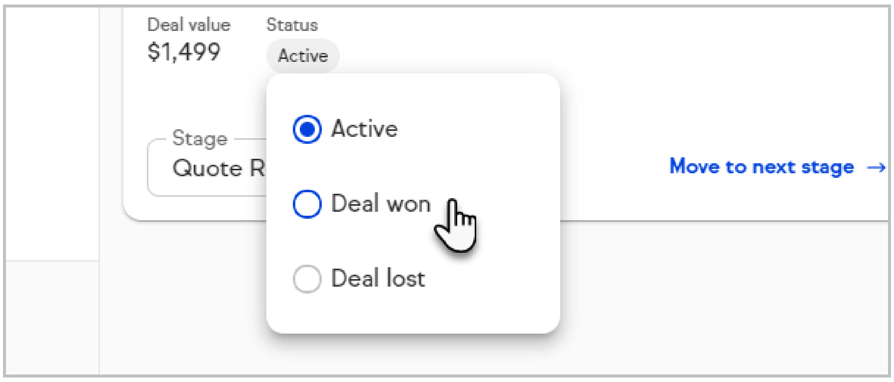
3. Click on the deal card to see all the deals in the panel on the right side of the page.
4. Click **Move to next stage** to move the deal through your Pipeline



5. Select a new Pipeline and Stage from the **Stage** drop-down to move a deal to a specific stage



6. You can also quickly change the status of the deal by clicking on the current status and selecting the new status from the drop-down



7. For more deal configuration options, click the **Open** button on the deal card. Click here to learn more about managing deals