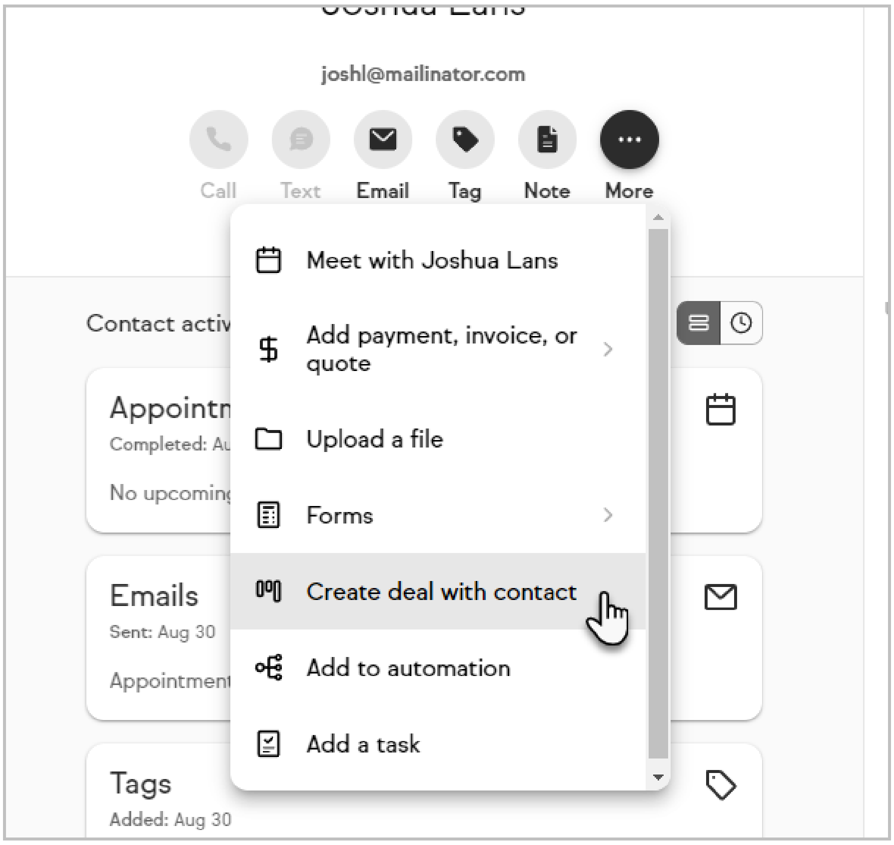
Add and edit a Deal from the Contact area

This article applies to:

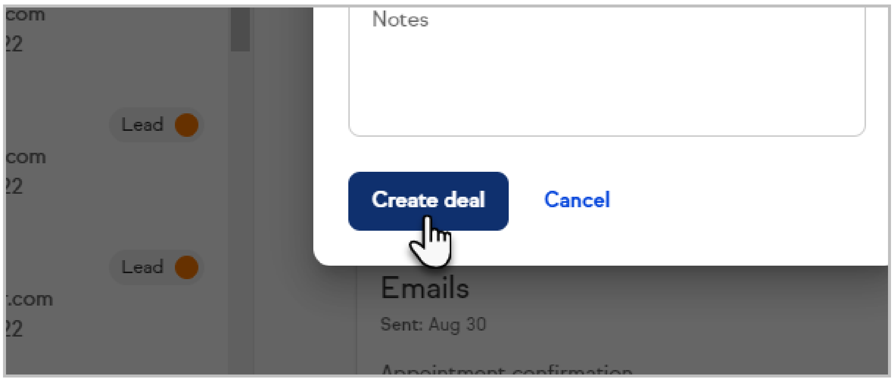
Work more efficiently by creating a deal while viewing a contact. You can also view and edit the deal on the contact record instead of moving back to the Sales Pipeline page.

Create a new deal

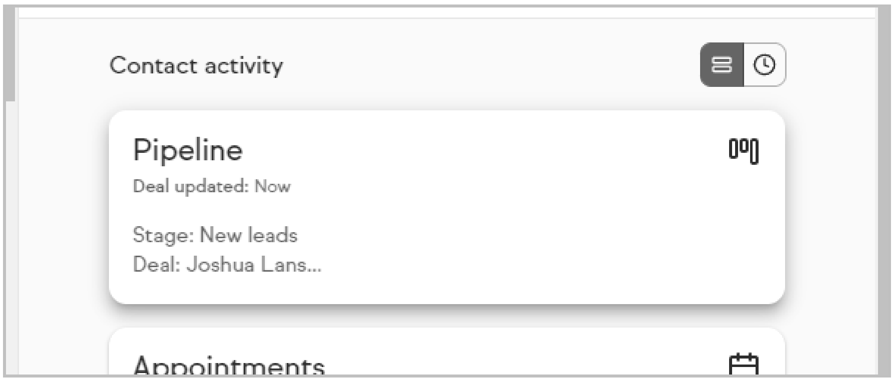
1. While viewing the contact record, click the **More** option and select **Create deal with contact**



2. Add the deal information and click the **Create deal** button

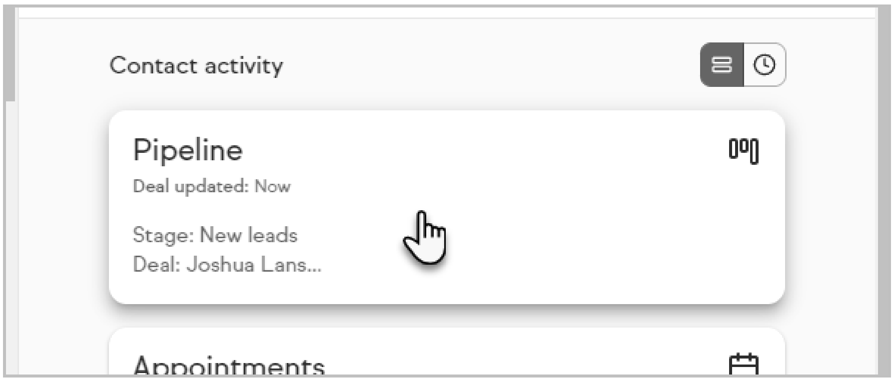


3. The deal is now present in the contact activity panel



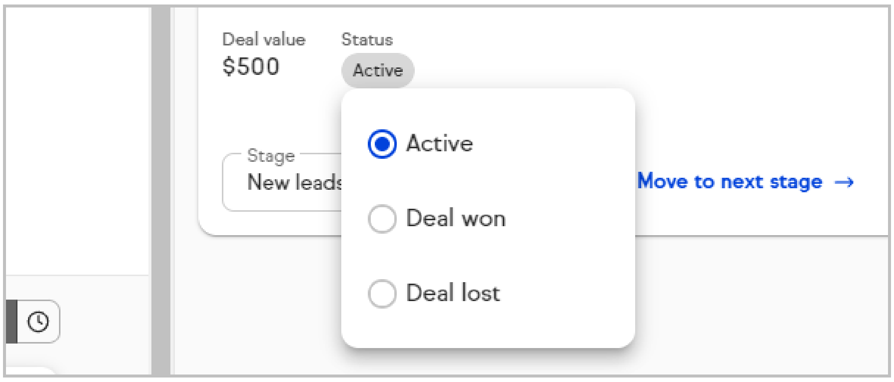
View or edit a deal while viewing a contact

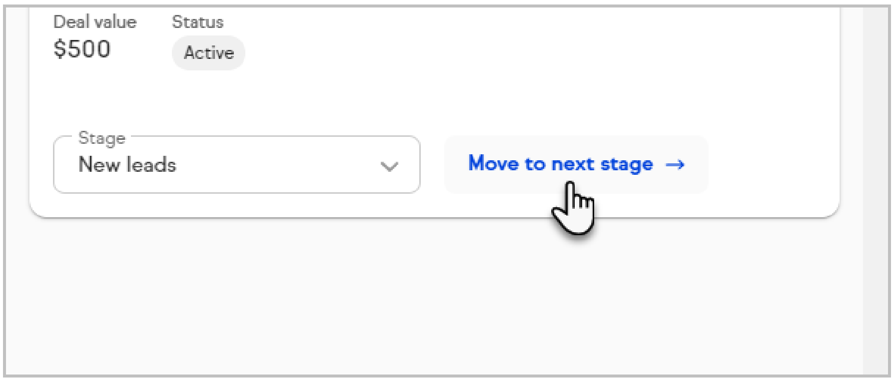
1. While viewing the contact record, click on the deal in the Contact activity panel



2. Click **Edit deal** to make any changes

3. Or quickly change the status or stage of the deal


Deal value
$500
Status
Active
Active
Deal won
Deal lost
Stage
New leads
Move to next stage →


Deal value
$500
Status
Active
Stage
New leads
Move to next stage →