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.

1. Create a new deal
2. View or edit a deal while viewing a contact

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