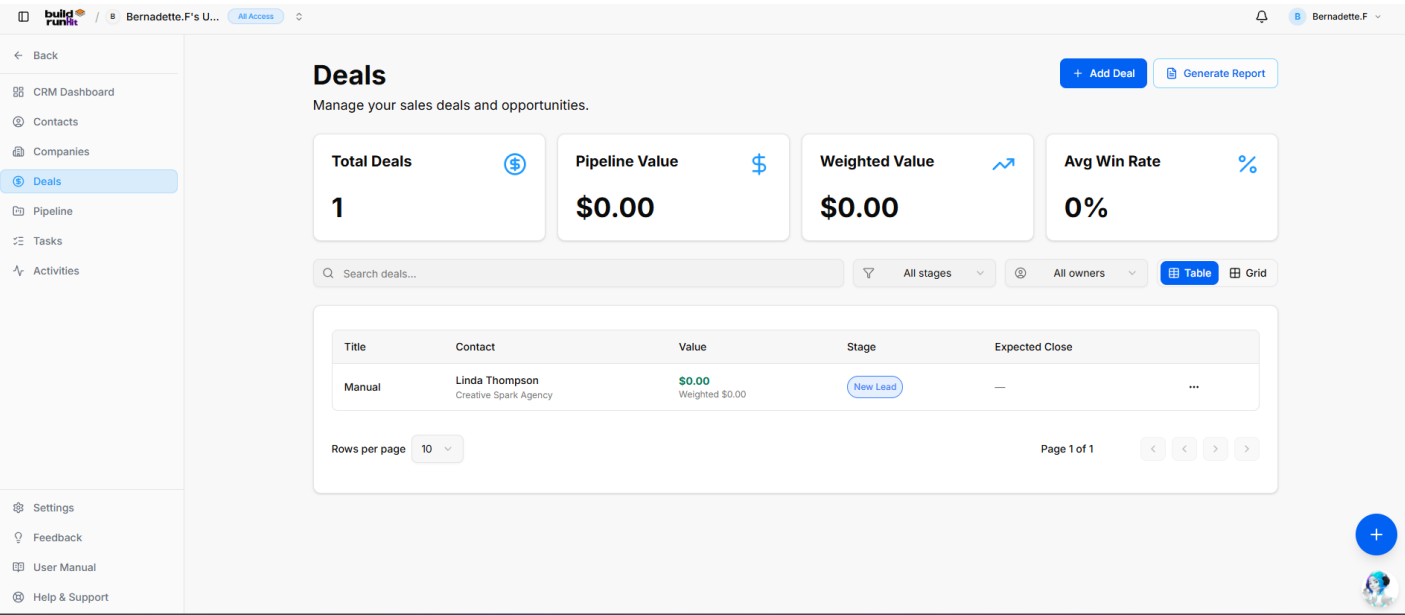


BuildRunKit CRM: Deals Sub-Section

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The **Deals** sub-section provides central pipeline tracking to manage active sales opportunities, forecast revenue, and monitor deal conversion metrics.

Header & Action Buttons

- **+ Add Deal:** Direct action button to open the new deal creation modal.
- **Generate Report:** Opens the **CRM Deals Report** export modal:
 - **Export Count:** Displays total targeted deal records (e.g., *Exporting 1 records*).
 - **Export Format Options:** Download data instantly as **Export as PDF** or **Export as CSV**.

CRM Deals Report

Generate a report for the CRM Deals data.

Exporting 1 records

Export format

Export as PDF

Export as CSV

Deal Summary Metrics

Top KPI cards display key revenue and pipeline performance metrics:

- **Total Deals:** Counts all active sales opportunities logged in the system.
- **Pipeline Value:** Displays the total unweighted monetary value of all active pipeline opportunities.
- **Weighted Value:** Calculates projected revenue weighted by win probability percentages across current stages.
- **Avg Win Rate:** Tracks the overall historical deal conversion percentage.

Directory Controls & Search Bar

- **Search deals...:** Global text search input to locate opportunities by title or keyword.
- **All stages Dropdown:** Filter opportunities by pipeline status (e.g., New Lead, Proposal Sent).
- **All owners Dropdown:** Filter deals by assigned internal account managers.
- **View Switches:** Toggle view modes between **Table** (list view) and **Grid** (card view).
- **Rows per page & Pagination:** Dropdown menu and directional controls to navigate multi-page lists.

Deals Table Data Columns

- **Title:** The primary name assigned to the sales opportunity.
- **Contact:** Associated primary contact name and parent organization profile.
- **Value:** Total deal monetary value alongside calculated weighted revenue value.
- **Stage:** Current pipeline status badge (e.g., *New Lead*).

- **Expected Close:** Target completion date for closing the sale.
- **Row Actions Menu** (...): Context menu providing direct **View**, **Edit**, and **Delete** options for individual deal records.

BuildRunKit CRM: Adding a New Deal

Clicking the + **Add Deal** button opens the creation modal divided into two tabs:

1. Details Tab

Add Deal

Details

Custom Fields

Title *

Enter deal title

Contact *

Select a contact

Stage *

Select an option

Value

Probability (%)

Expected Close Date

Pick a date

Owner

No owner

Description

Enter deal notes and details...

Cancel

Create

Captures primary deal parameters and financial forecasts:

- **Title ***: Required field to enter the opportunity name.

- **Contact ***: Required dropdown selector to associate the deal with an existing contact record.
- **Stage ***: Required dropdown selector to set the initial position within your sales pipeline.
- **Value**: Monetary worth of the opportunity.
- **Probability (%)**: Estimated likelihood percentage of winning the deal, used to compute weighted pipeline value.
- **Expected Close Date**: Date picker input to target target contract execution or closing.
- **Owner**: Dropdown menu to assign deal management responsibility to a workspace team member.
- **Description**: Multi-line text field to enter context, negotiation notes, and opportunity details.

2. Custom Fields Tab

- **Tailored Deal Data**: Dynamic inputs populated from **Settings > Custom Fields** to capture business-specific deal properties.
- **Modal Actions**: Click **Cancel** to discard inputs or **Create** to record the deal in your pipeline.

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