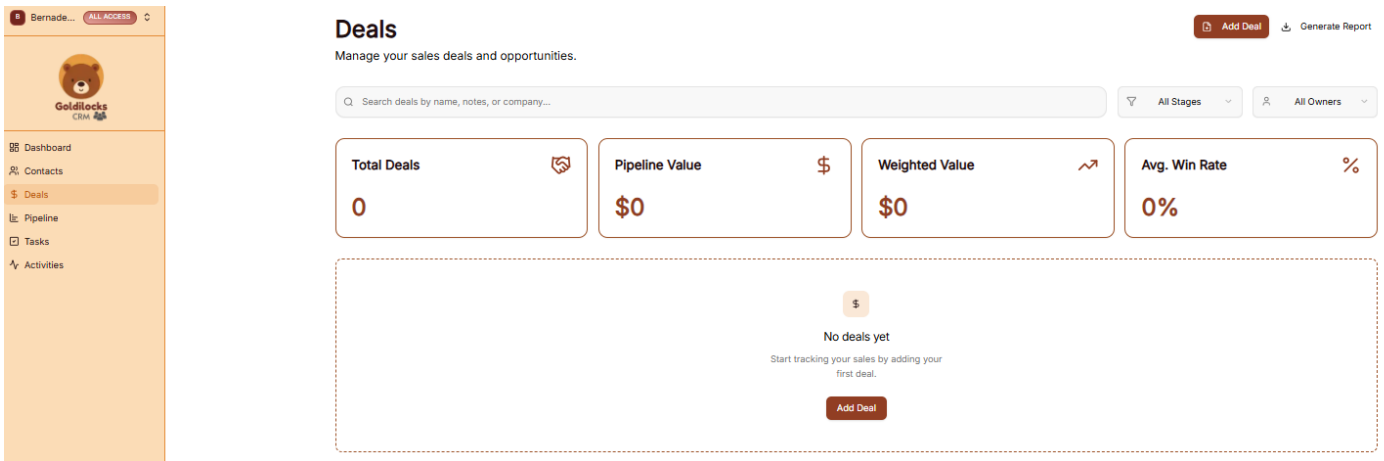


# Goldilocks CRM Deals

## Goldilocks CRM Deals Dashboard



The Deals module is where you track revenue opportunities and their progress through your sales cycle. The dashboard provides four high-level metrics to monitor your sales health:

- **Total Deals:** The total number of opportunities currently in your system.
- **Pipeline Value:** The combined financial value of all active deals.
- **Avg Deal Size:** The average value of your open opportunities.
- **Win Rate:** The percentage of deals successfully closed.

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## How to Add a Deal

### Add New Deal ✕

Create a new deal to track potential sales opportunities.

#### Deal Information

Deal Name \*

Deal Amount (\$)  Probability (%)

Pipeline Stage

New Lead ▼

Expected Close Date

Deal Owner

▼

#### Contact \*

Select a contact associated with this deal

Type at least 2 letters to search contacts

#### Notes

Deal Notes

To record a new sales opportunity, click the brown + Add Deal button at the top right of the screen. This opens a form with the following fields:

- **Basic Information:** Enter the Deal Name and the expected Amount.
- **Customer & Timeline:** Select the associated Customer from your contacts and set an estimated Close Date.
- **Pipeline Placement:** Assign the deal to a specific Pipeline and Stage (e.g., New Lead, Discovery, Proposal).
- **Ownership & Priority:** Designate a Deal Owner and set a Priority level (Low, Medium, or High).
- **Tags & Notes:** Categorize the deal with Tags and include any background context in the Notes section.
- **Finalize:** Click the brown Add Deal button to save the record.

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## Generate Report

**Generate Deals Report** ×

Configure report options and generate a PDF or Excel report

**Export Format**

Choose your preferred file format

PDF (Best for printing and sharing)

Excel (Best for analysis and editing)

Preview Generate Report

You can export your deal data by clicking the Generate Report link in the top right corner.

- Export Format: Choose your preferred file type.
  - PDF: Best for sharing a visual summary of your sales performance.
  - Excel: Best for calculating commissions and detailed revenue forecasting.
- Action: Select Preview to review the data or Generate Report to download the file immediately.

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