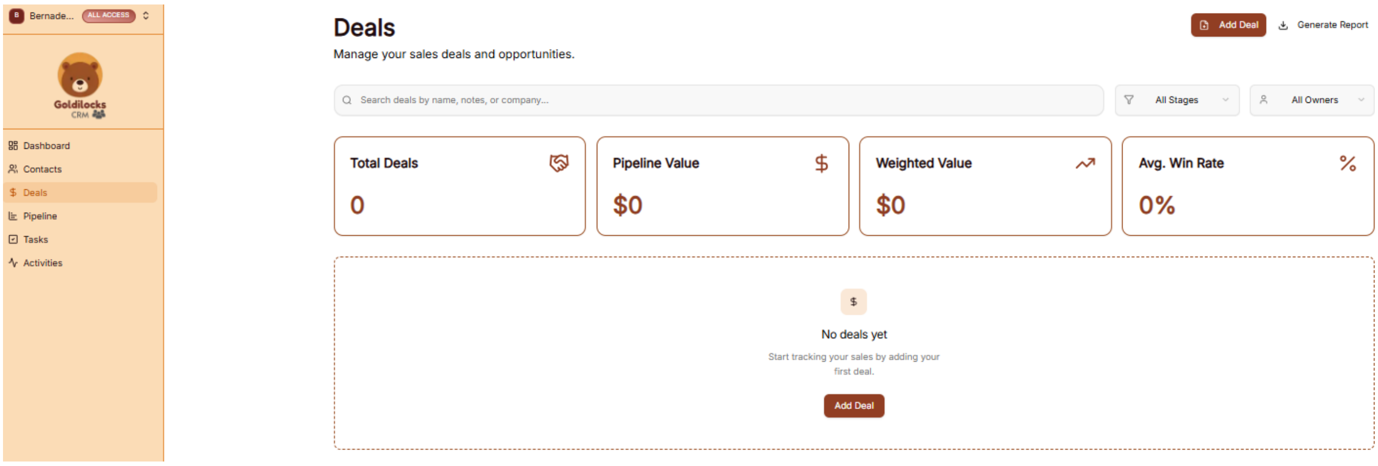
# Goldilocks CRM Deals

## 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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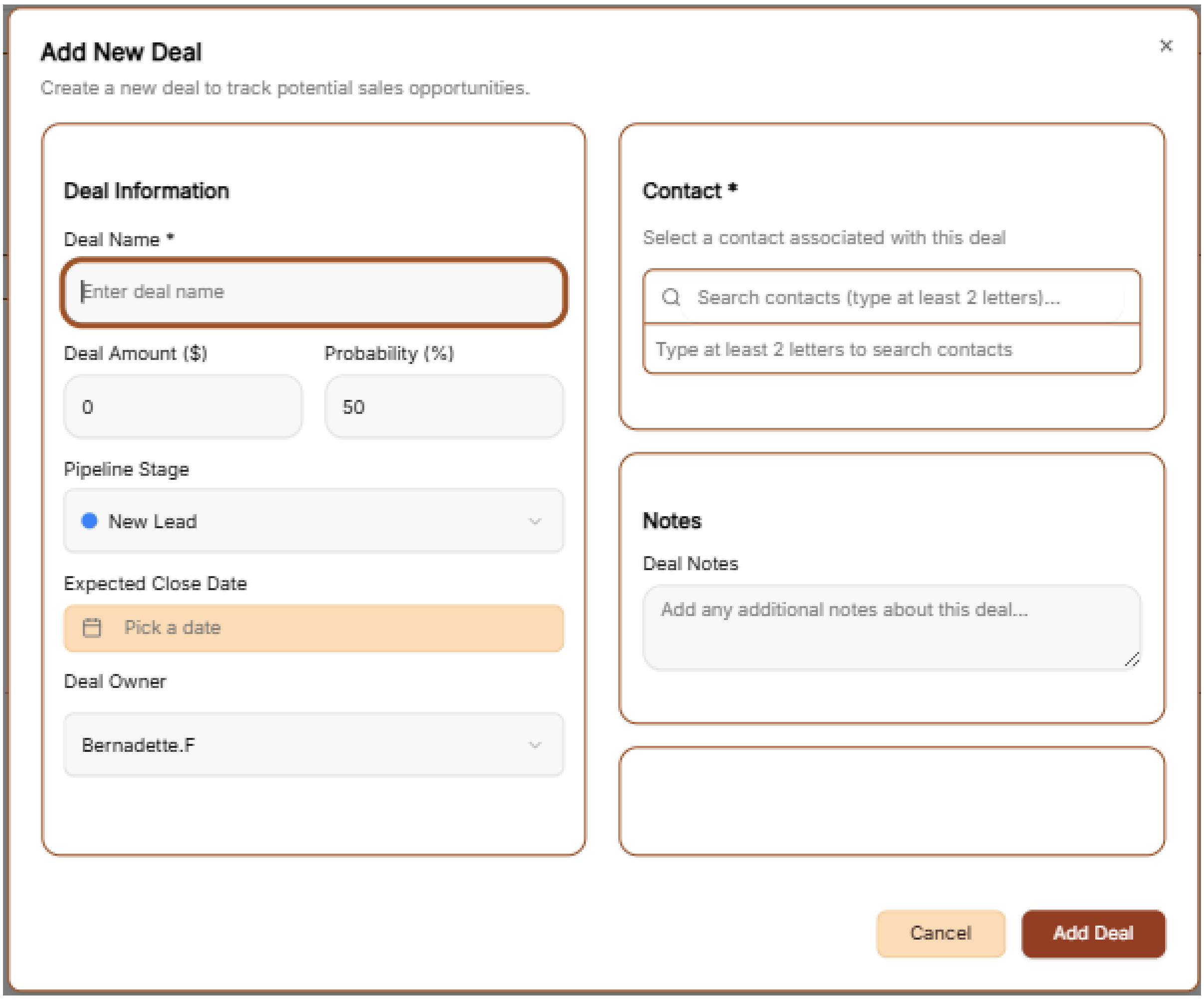
# How to Add a Deal




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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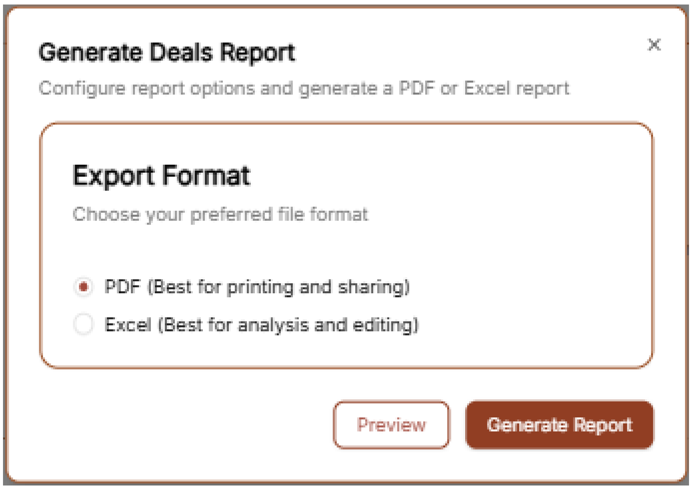
# Generate Report




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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Revision #1
Created 2026-05-14 12:45:35 UTC by Bernadette F
Updated 2026-05-14 12:47:16 UTC by Bernadette F