The deal page

The stage bar, details, financing, participants, tasks, activity and stage history on a single deal.

Click any card on the board, any row in the deals table or any deal on a profile to open the deal page. The header shows the candidate's name (click it to open their profile), the current stage chip, the deal type, the territory of interest and how many days the deal has been in its stage.

The stage bar

Under the header every stage of your pipeline appears as a chip, with a tick on the current one. Click another chip to move the deal there. If the current stage has exit gates that are not met, a dialog explains what is missing — see **Moving a deal between stages** for how gates and overrides work.

Details and Edit

- **Details** shows the owner, source, expected signing date, initial fee, units planned, financing status and notes, and the lost reason when a deal was closed as lost.
- **Edit** at the top right opens the fields in place: territory of interest, units planned, expected signing, owner, initial fee, financing status (self funded, bank loan, SBA loan, partner or investor, undecided), lender, a **Financing confirmed** tick, and notes.
- The **Delete** button inside Edit removes the deal and its stage history, tasks and notes after a confirmation. It cannot be undone. The candidate record stays.

The right-hand cards

- **Tasks** for this deal, with a quick add and a tick to complete.
- **People on this deal** lists the participants — the applicant and, later, co-applicants, guarantors and investors — with the primary marked. Click a name to open their profile.
- **Stage history** shows every move: from which stage to which, when, by whom, and the reason when a manager overrode a gate.

Activity

The Activity card is the deal's timeline. It shows what was logged against this deal and everything logged against its participants, so a note left on the candidate's profile also appears here. Use the box at the top to log a note, call or meeting.