The deals board

Working deals by stage: the board, the table view, filters and the counters above them.

Deals in the left menu opens the board. Each column is one of your open pipeline stages, in order, and each card is a deal. The board is where a development manager spends most of the day.

Reading a card

- The candidate's name, and the owner's initials on the right.
- The territory of interest.
- Days in the current stage, shown in amber once the deal is past the stage's target days.
- A units chip when the deal is for more than one unit.
- The expected signing date, in red once it has passed.

Columns

The column header shows the stage name, how many deals are in it, the stage's target days and how many exit gates it has. Signed and Closed Lost columns are hidden until you tick **Show signed and lost**, so the board stays about work in progress.

Moving a deal

Drag a card into another column. Gorilla Dash checks the exit gates of the stage it is leaving; if they are met the move is saved, and if not a dialog shows what is missing. Dropping a card onto Closed Lost asks for the lost reason. The full rules are in **Moving a deal between stages**.

The table view

The toggle next to the search box switches to a table with the same deals: candidate, stage, days in stage, territory, owner, expected signing and when the deal was added. Sort any column and page through it. Click a row to open the deal.

Filters and counters

- **Search** matches the deal name and the candidate's name or email.
- **Stage** narrows the board or table to the stages you pick.
- The three counters show **open deals**, deals **signed in the last 30 days** and deals **lost in the last 30 days** for the current filter.