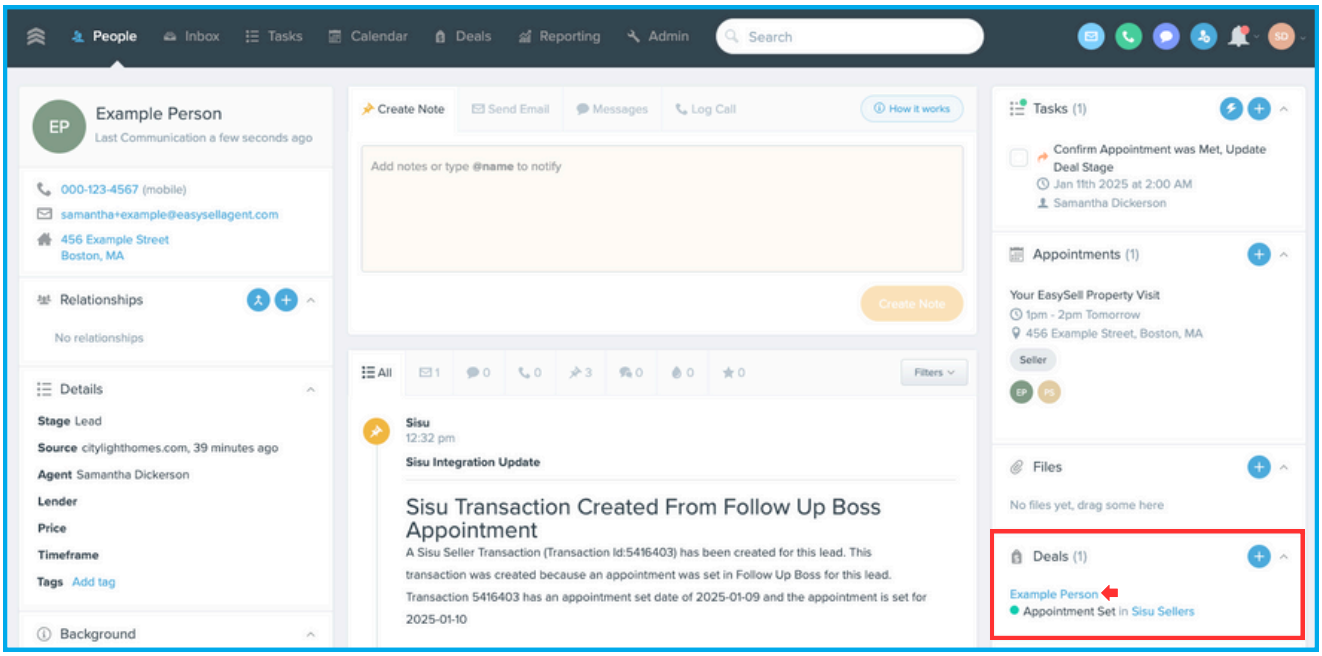
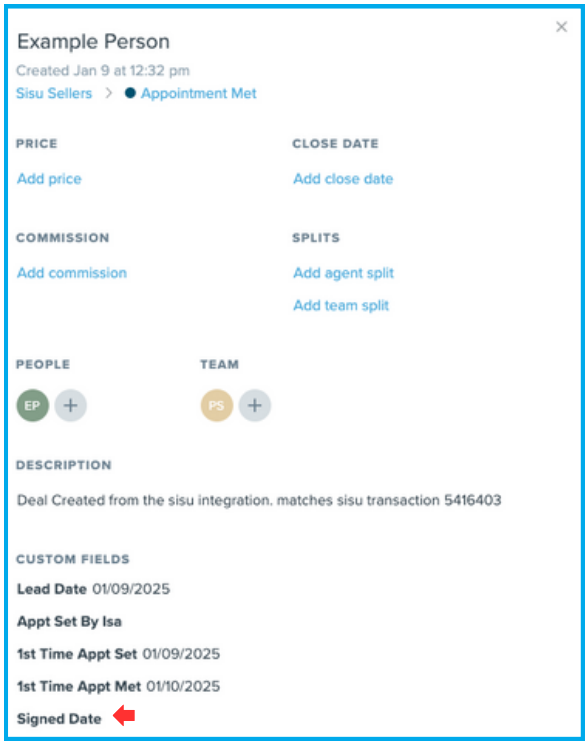
Updating Deal Status - Agents

Step 1: Find the deal on the right hand side of the lead's contact record & click the name of the deal to open it.



Step 2: Once the deal is open, scroll down to the "Custom Fields" section

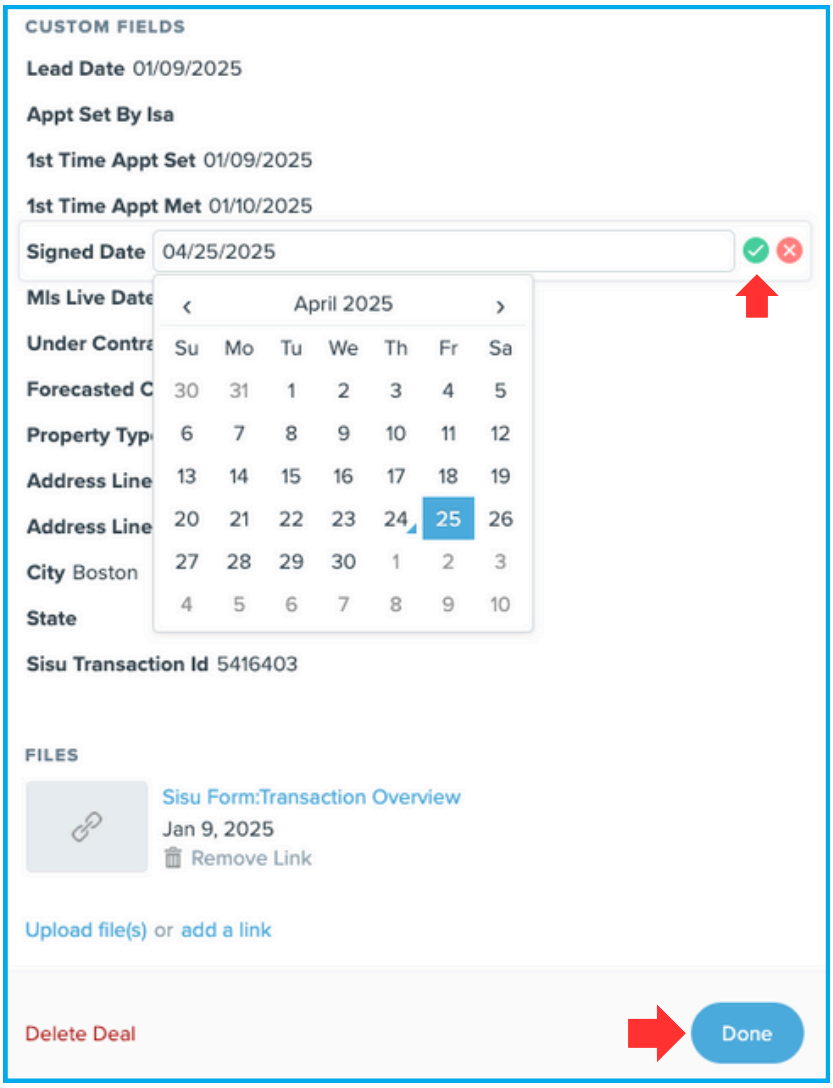
Step 3: Click on the "Signed Date" field.

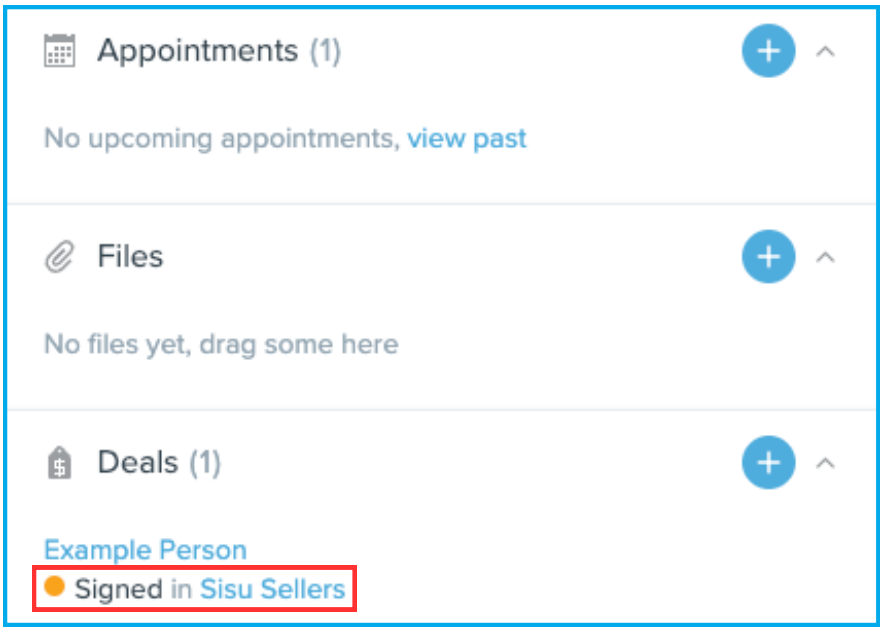


Step 4: Select the date that the lead agreed to work with you on the calendar that appears.

Step 5: Press the green arrow to confirm the date.

Step 6: Press “Done” at the bottom of the deal.





The deal will update to the “Signed” stage