Deals

Using Mria CRM · https://mriacrm.com/docs/deals/

iHow to Manage Deals in Mria CRM for Jira

The **Deals** module allows you to manage all qualified opportunities in your pipeline. Deals can be created from scratch or converted from Leads. You can track them in either **Table view** or **Kanban view**, depending on your preference.

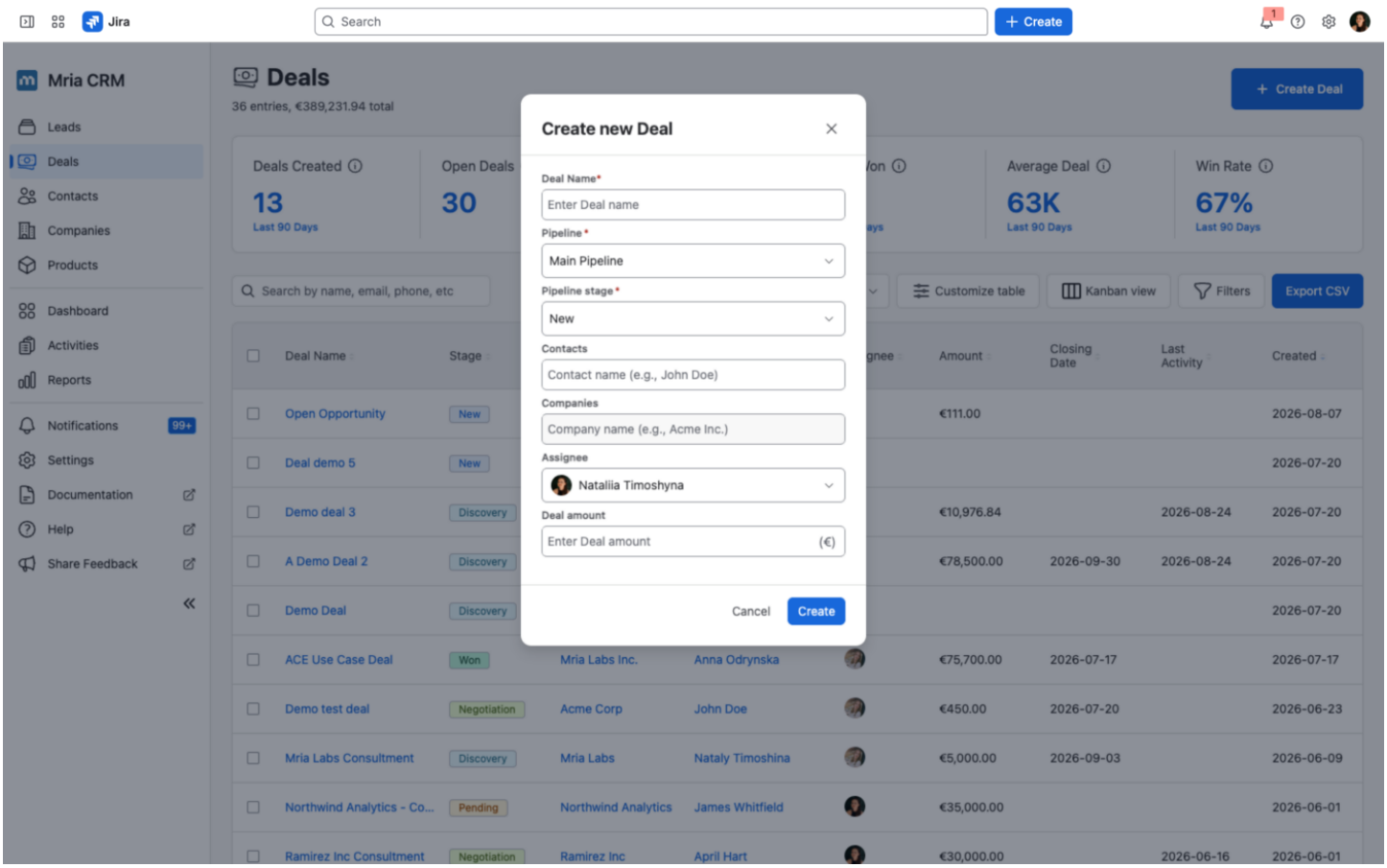
See Activities for details on Notes, Meetings, Tasks, Files, and Jira links.

1. Creating Deals

You can create a Deal in three ways:

From scratch

- Click **Create Deal**.
- Fill in the required fields: **Deal Name**, **Pipeline**, and **Pipeline stage**.
- Optionally link **Contacts** and **Companies**. Both fields accept **more than one** record, and both are **optional** — you can create the Deal first and attach people and organizations later.
- Set the **Assignee** and **Deal amount** if you know them.
- Click **Create**.



Contacts and Companies are no longer required. Earlier versions insisted on one of each before a Deal could exist, and on the Contact already belonging to the Company. Neither constraint applies now — useful when a deal lands before you know who you'll actually be dealing with, or when the opportunity spans several organizations.

By converting a Lead

- Leads can be converted into Deals.
- Refer to the Lead to Deal Conversion page for details.

By importing a file

Click **Import Deals** above the Deals list to bulk-create Deals from a spreadsheet. Bulk import is available for every entity — Leads, Contacts, Companies, Products and Deals.

The wizard has the same five steps as the other imports:

1. **Upload File** — drag in a `.CSV` or `.XLSX` file, up to 3 MB. A sample file is downloadable from this step if you want the expected column layout.
2. **Map Fields** — match your columns to Deal fields. Mria CRM auto-matches on similar names first, and Custom Fields on Deals appear in the list alongside the system ones.
3. **Map Values** — line up the values in list-backed columns, such as pipeline stage, with the ones configured in your workspace.
4. **Review Details** — check the row count and choose how duplicates are handled before anything is written.
5. **Import File** — the import runs, then a summary confirms how many records were added.

Every step, and the options on the review screen, are covered on Deals Import — including what the import may do with the Contact and Company columns in your file.

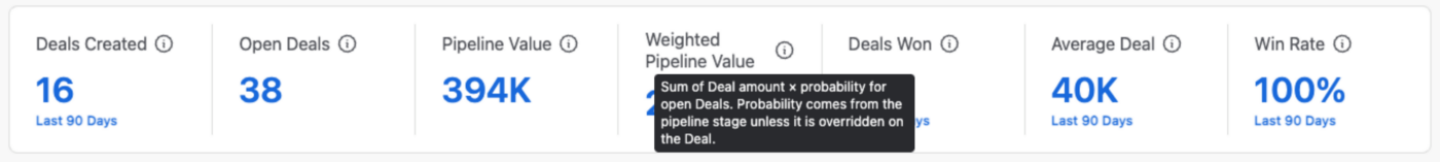
Deal imports and exports get their own **Deals** tab in Data Administration, where you can see who ran an import, when, how many rows it carried and whether it succeeded.

> *Note:* You can enter both positive and negative Deal amounts. This can be useful when tracking refunds, discounts, or other adjustments within your pipeline.

2. Views

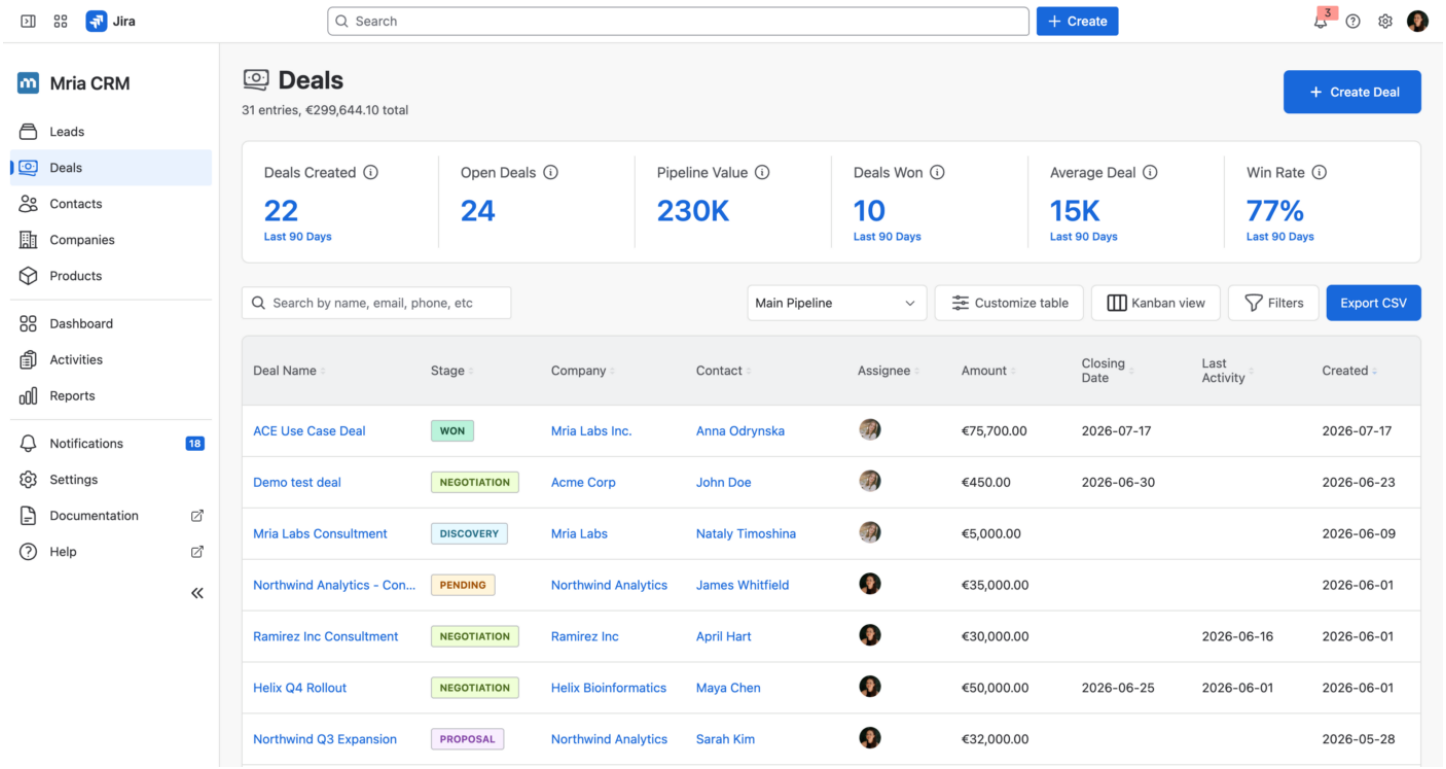
Table view

- Displays Deals in a grid with columns for Stage, **Primary Company**, **Primary Contact**, Assignee, Amount, Closing Date, and Last Activity.
- Provides summary metrics at the top: Deals Created, Open Deals, Pipeline Value, **Weighted Pipeline Value**, Deals Won, Average Deal, and Win Rate.
- **Probability** and **Weighted Amount** are optional columns — switch them on in Customize table.



Weighted Pipeline Value is the sum of Deal amount × probability for open Deals, next to Pipeline Value so the two can be read together. Probability comes from the pipeline stage unless it is overridden on the Deal.

Because a Deal can hold several Contacts and Companies, the table shows the **Primary** one of each — open the Deal to see the full list.



Export CSV: allows you to export the current list of Deals (based on applied filters and visible columns) as a `.csv` file for external use.

Kanban view

- Displays Deals in columns by Pipeline Stage.
- Stages include: *New, Discovery, Pending, Negotiation, Proposal, Lost, Won*.
- Each card shows Deal Name, Company, Contact, Amount, Deal Probability, and Owner.
- **Sort by** offers Created date, Closing date, Amount, **Next activity date** and **Last activity date**. Clicking the arrows toggles ascending and descending.

Column summary

Each column ends in a three-line summary, pinned to the bottom of the column so it stays in view while you scroll the cards above it:

Figure	What it is
Total amount	The sum of the Deal amounts in the column.
Weighted amount	The sum of each Deal's amount × its probability. A Deal with no probability of its own falls back to the probability configured for that stage — so in a stage set to 60%, a €10,000 Deal with no probability contributes €6,000.
Average Deal Probability	The mean probability across the column.

Sort by: Created date | Main Pipeline | Table view | Filters

3 PENDING €41,212.00

Northwind Analytics - Consultment
Northwind Analytics

James Whitfield €35,000.00 (60%)

Tetra Deal
Tetra Bella

Lorenzo Padrini €5,112.00 (60%)

2026-05-13 AK

IT Solutions Deal
IT Solutions

Maria Gonsalez €1,100.00 (60%)

€41,212.00 | Total amount

€24,727.20 | Weighted amount

60.00% | Average Deal Probability

8 NEGOTIATION €98,550.00

Metrica CRM Audit
Metrica Software

Nataliia Metrica €5,000.00 (80%)

Demo test deal
Acme Corp

John Doe €450.00 (80%)

2026-07-20

Ramirez Inc Consultment
Ramirez Inc

April Hart €30,000.00 (80%)

Helix Q4 Rollout
Helix Bioinformatics

Maya Chen €50,000.00 (80%)

€98,550.00 | Total amount

€78,840.00 | Weighted amount

80.00% | Average Deal Probability

The figures cover the **whole column**, not just the cards that happen to be loaded, so they do not change as you scroll. Scrolling a long column moves the cards and leaves the summary exactly where it is.

Sort by: Created date | Main Pipeline | Table view | Filters

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€41,212.00 | Total amount

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60.00% | Average Deal Probability

8 NEGOTIATION €98,550.00

Ford Consulting

William Ford €10,000.00 (80%)

Thomson Enterprises Deal

Thomson Enterprises

Rhonda Thompson €1,500.00 (80%)

Crane-Ferrel Deal

Crane-Ferrell

Joseph Goodwin €1,100.00 (80%)

Acme Deal 2

Acme Corp

John Doe €500.00 (80%)

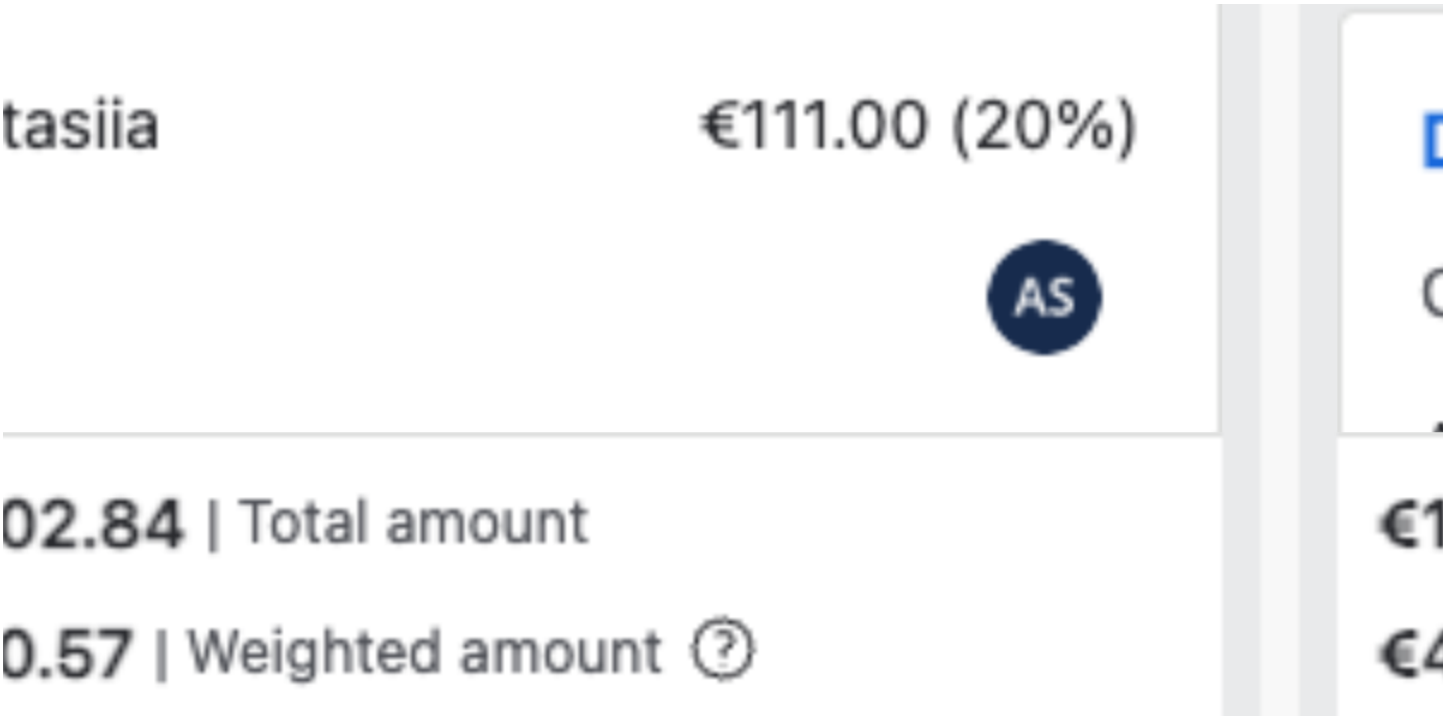
2026-04-29

€98,550.00 | Total amount

€78,840.00 | Weighted amount

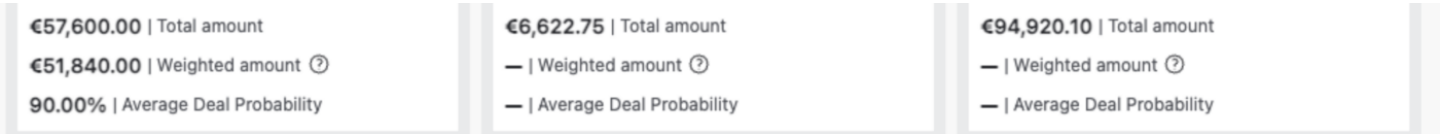
80.00% | Average Deal Probability

The ? beside **Weighted amount** repeats the fallback rule, quoting the stage probability of the column you are hovering over:

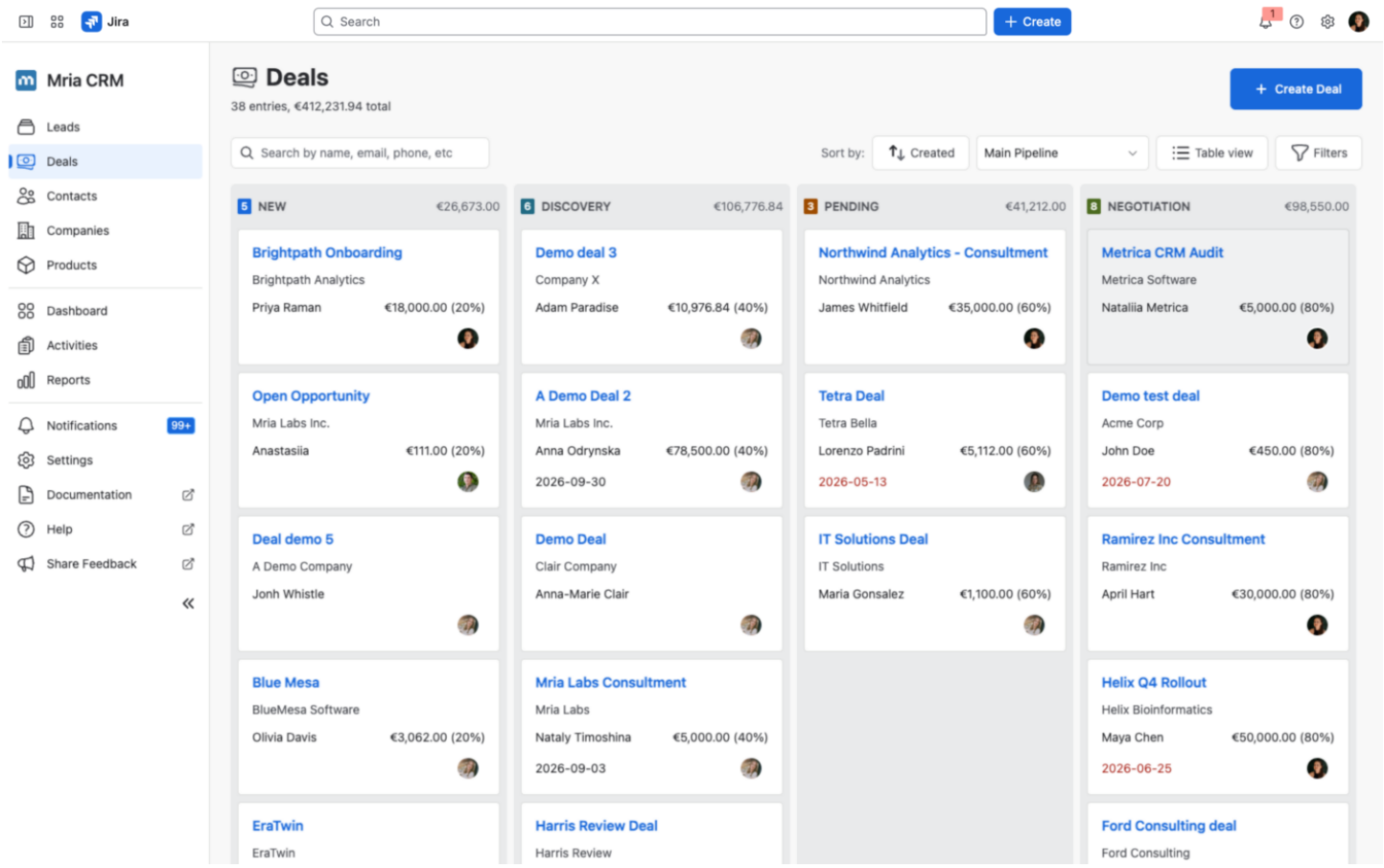


> An empty column still shows a summary, reading 0.00 / 0.00 / 0.00%. That is intended — the column is there, it just has nothing in it yet.

Won and Lost columns show their Total amount, but Weighted amount and Average Deal Probability read **—**: weighting is a forecast of open Deals, and a closed Deal has nothing left to forecast.



Stage probabilities are set per pipeline — see Pipelines Configuration.

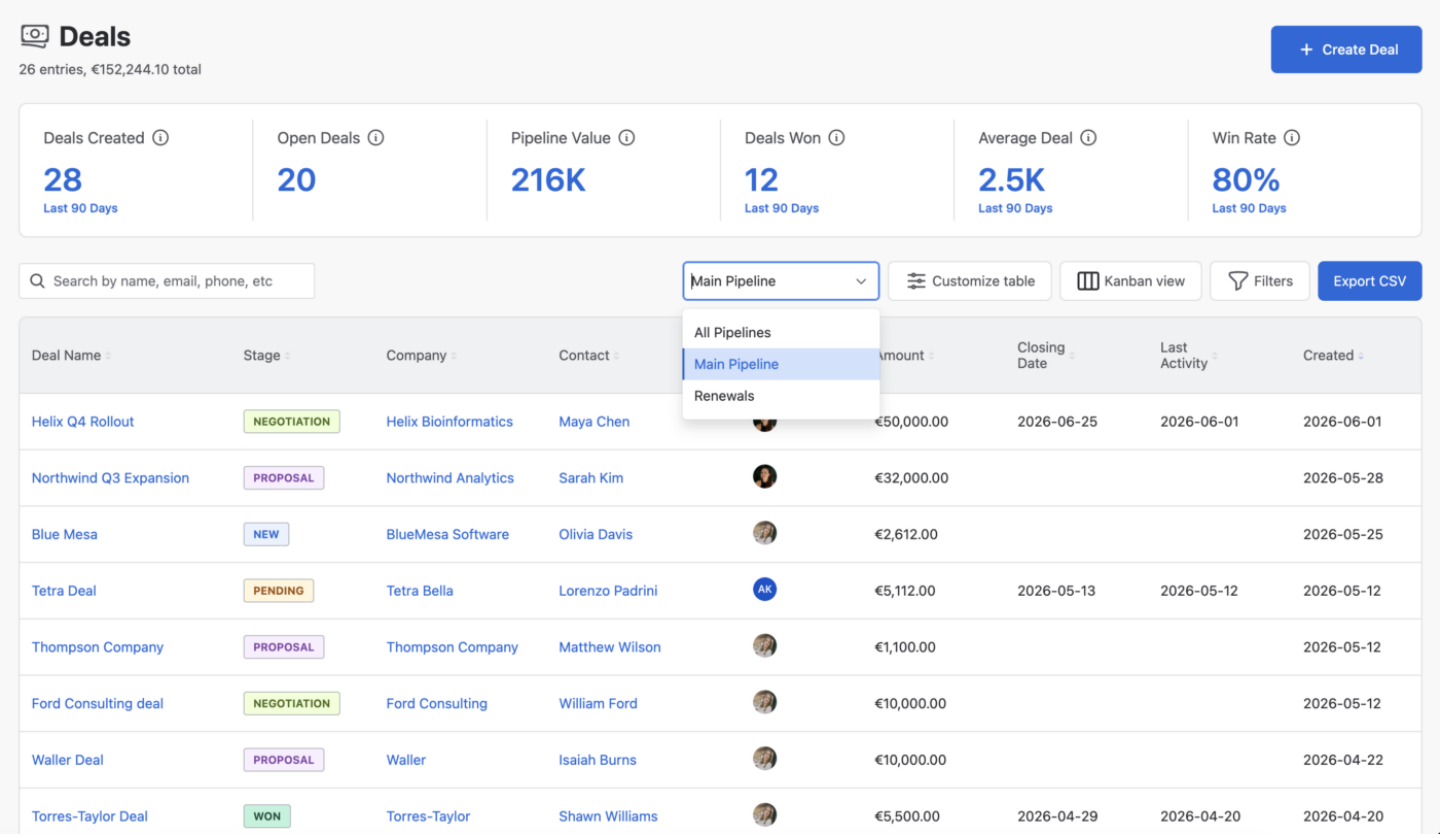


Pipeline selector

A **Pipeline** dropdown at the top of the Deals page lets you choose which pipeline's stages you're looking at:

- Selecting an individual pipeline (e.g., **Main Pipeline** or **Renewals**) shows only the Deals in that pipeline, with that pipeline's stages.
- Selecting **All Pipelines** aggregates Deals across every configured pipeline. Stages with **identical names** across pipelines (such as *New*, *Won*, *Lost*) are combined into a single column; stages that exist in only one pipeline appear as their own column.

The same Pipeline selector also surfaces on Dashboards, as the Pipeline filter at the top of every dashboard, and in deal-based Reports.



See Pipelines Configuration for setup details and the full All Pipelines aggregation behavior.

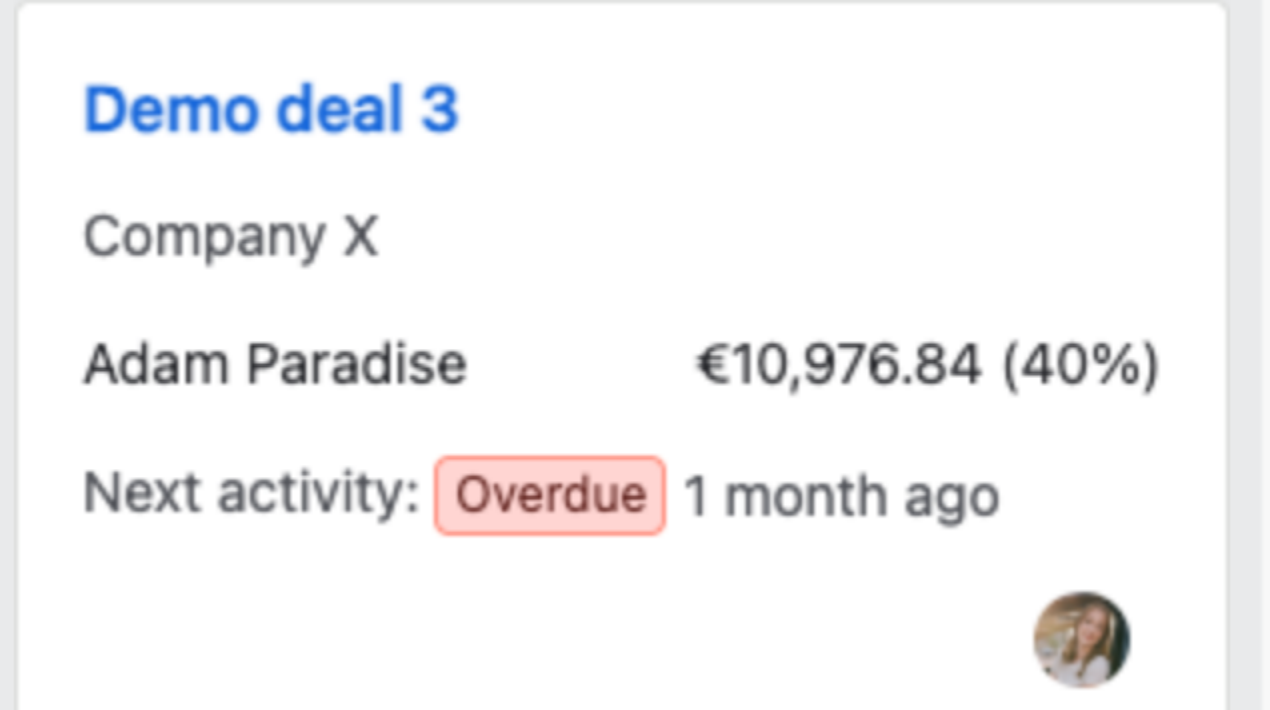
3. Next activity and last activity

Every Deal carries two dates derived from the Tasks and Meetings booked against it — **Next activity**, the earliest upcoming open one, and **Last activity**, the most recent completed one.

"Activity" means Tasks and Meetings only. Notes, emails and edits to the Deal do not move these dates.

- Switch the two columns on in **Customize table** to sort the list by them.
- In Kanban view they are **Sort by** → **Next activity date** / **Last activity date**, and each card shows its next activity.
- The Deal's Details panel shows both as relative values.
- **Filters** → **Basic** carries date ranges for both, plus **No activity in the last** (7, 14, 30 or 90 days) and a **Never** checkbox — the quickest way to surface deals nobody has moved.

A next activity whose date has passed is flagged **Overdue** on the card and in the table:



> A Task is treated as due at the **end** of its due date, while a Meeting is due at its start time. So a meeting at 21:00 today and a task due today no longer compete — the meeting is the next activity.

The same fields work identically on Leads, which covers the filter panel in more detail. Activities Breakdown explains the Planned / Timeline split these dates read from.

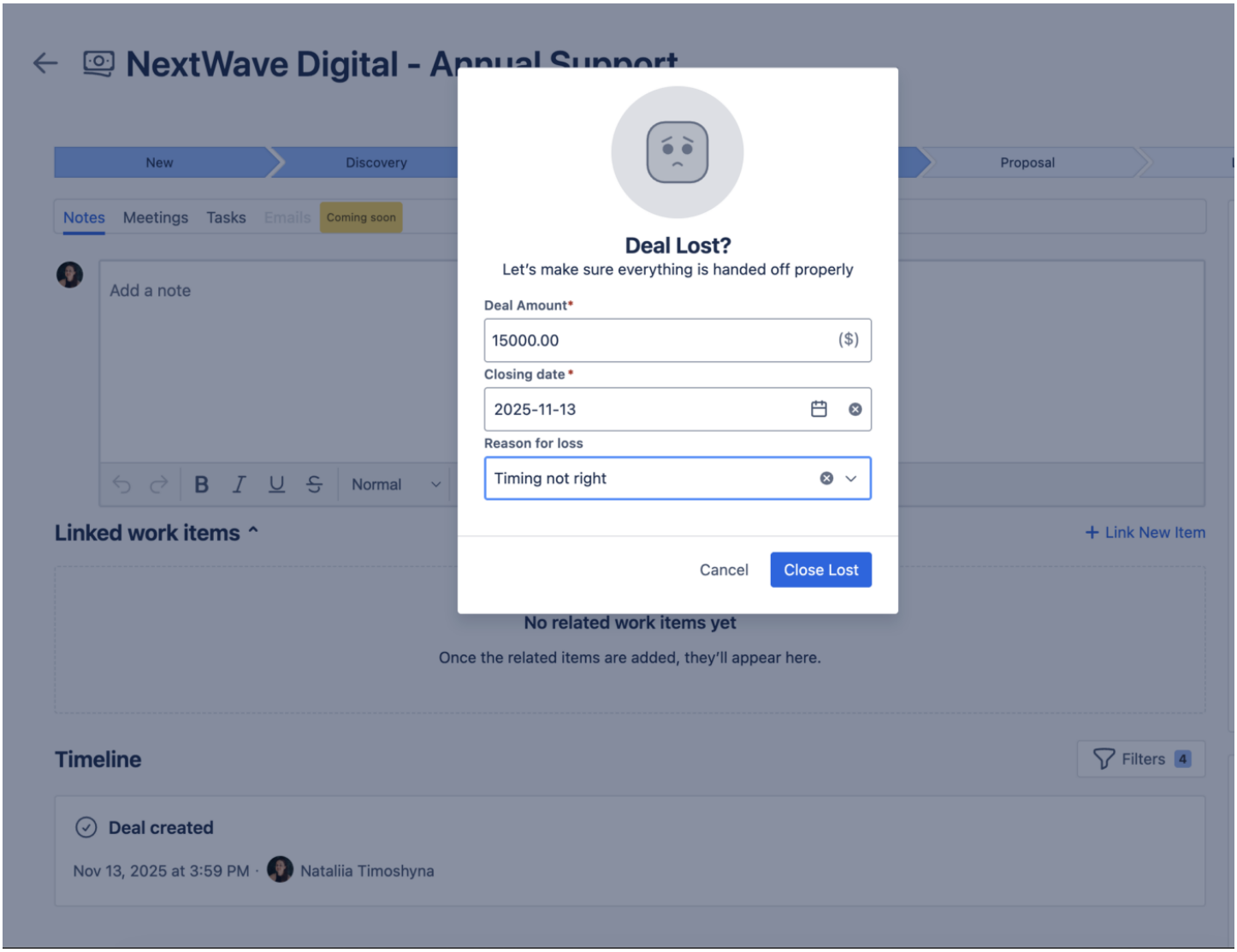
4. Deal Lifecycle

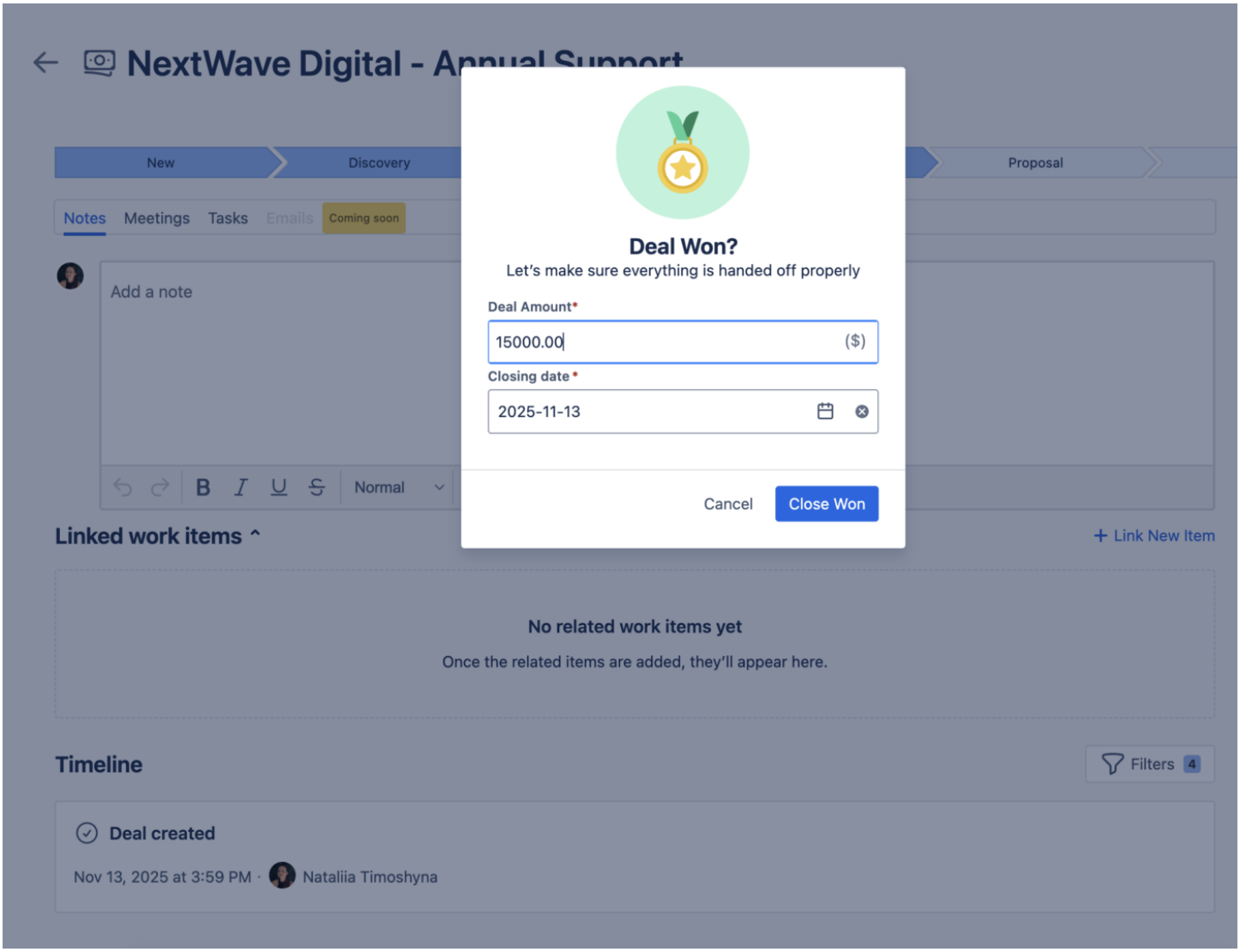
- **Open Deals**
  - Deals move through the pipeline stages (*New → Discovery → Pending → Negotiation → Proposal*). The stage bar at the top of the Deal view lets you jump straight to a stage.
- **Closed Deals**
  - A Deal can be closed as **Won** or **Lost** using the buttons at the bottom of the Deal view.
  - During closure, you must confirm the **Deal Amount** and **Closing Date**.
  - When marking a Deal as **Lost**, you can also choose a **Reason for Loss** from a predefined list (e.g., *No budget, Chose competitor, Timing not right*, etc.).

This field is optional — you may leave it as **None**.

- If a reason is selected, it will appear in the Deal's details as an informational field for future reference.
- Closed Deals can be **reopened** if needed and will return to the pipeline.

> *Note:* The **Closing Date** field is independent of when the Deal is actually marked as *Won* or *Lost*. You can set it to any date - past or future - that best reflects your sales process.





5. Deal probability

Each Deal has a **Deal probability** shown in the Deal Details panel.

Directly under Deal amount, the Details panel shows what the Deal contributes to the forecast — its weighted amount and the probability behind it, for example `Weighted €3,600.00 · 20% (stage default)`.

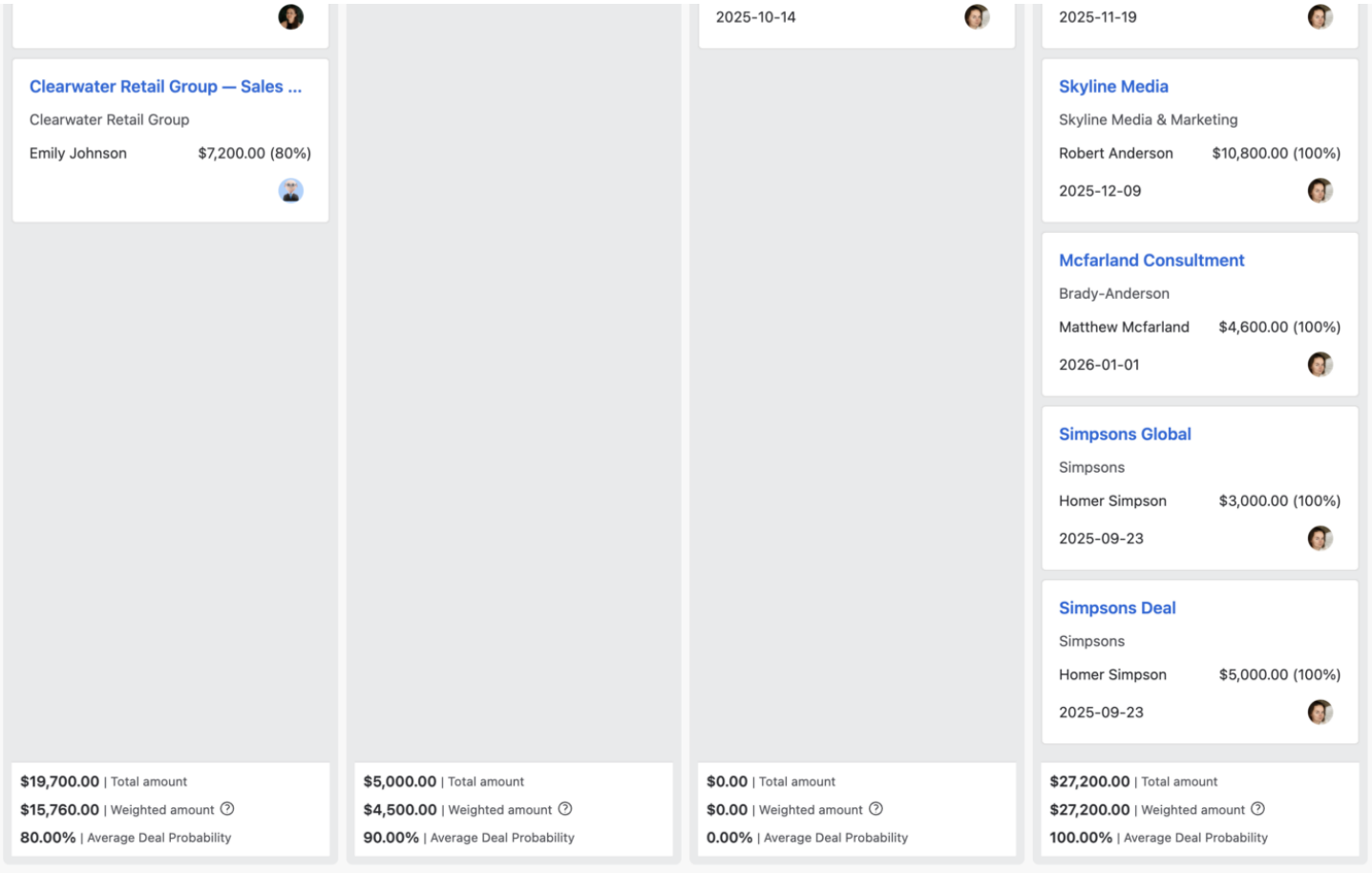
Details

Deal name	Brightpath Onboarding
Pipeline	Main Pipeline
Pipeline stage	New
Deal amount	€18000.00
Weighted	€3,600.00 · 20% (stage default)
Deal probability	20%
Deal type	-

Details

Deal name	Helix Q4 Rollout
Pipeline	Main Pipeline
Pipeline stage	NEGOTIATION
Deal amount	€50000.00
Deal probability	80%
Deal type	Cross-sell
Closing date	2026-06-25
Deal age	1 days
Assignee	 Nataliia Timoshyna
Source	Email Campaign

- **Default value:** the probability is taken from the current **Pipeline stage probability** (configured in Pipelines Configuration → Stages).
- **Manual override:** you can change the probability for a specific Deal. This override affects **only that Deal** (it doesn't change pipeline stage settings).
- **Weighted amounts:** a Deal's weighted amount is its amount × its probability. Totals — the Weighted Pipeline Value on this page and on Dashboards, and the Kanban column summaries — add up open Deals only.
- **Average probability per stage**: each column in Kanban view also shows the **average Deal probability** for that stage, calculated based on all Deals currently in the column. This helps quickly assess the overall likelihood of closing Deals at each stage.
- **Reports & filters**: Deal probability is available as a filter criterion in the **Filters → Advanced** panel and as a metric in deal-based Reports.

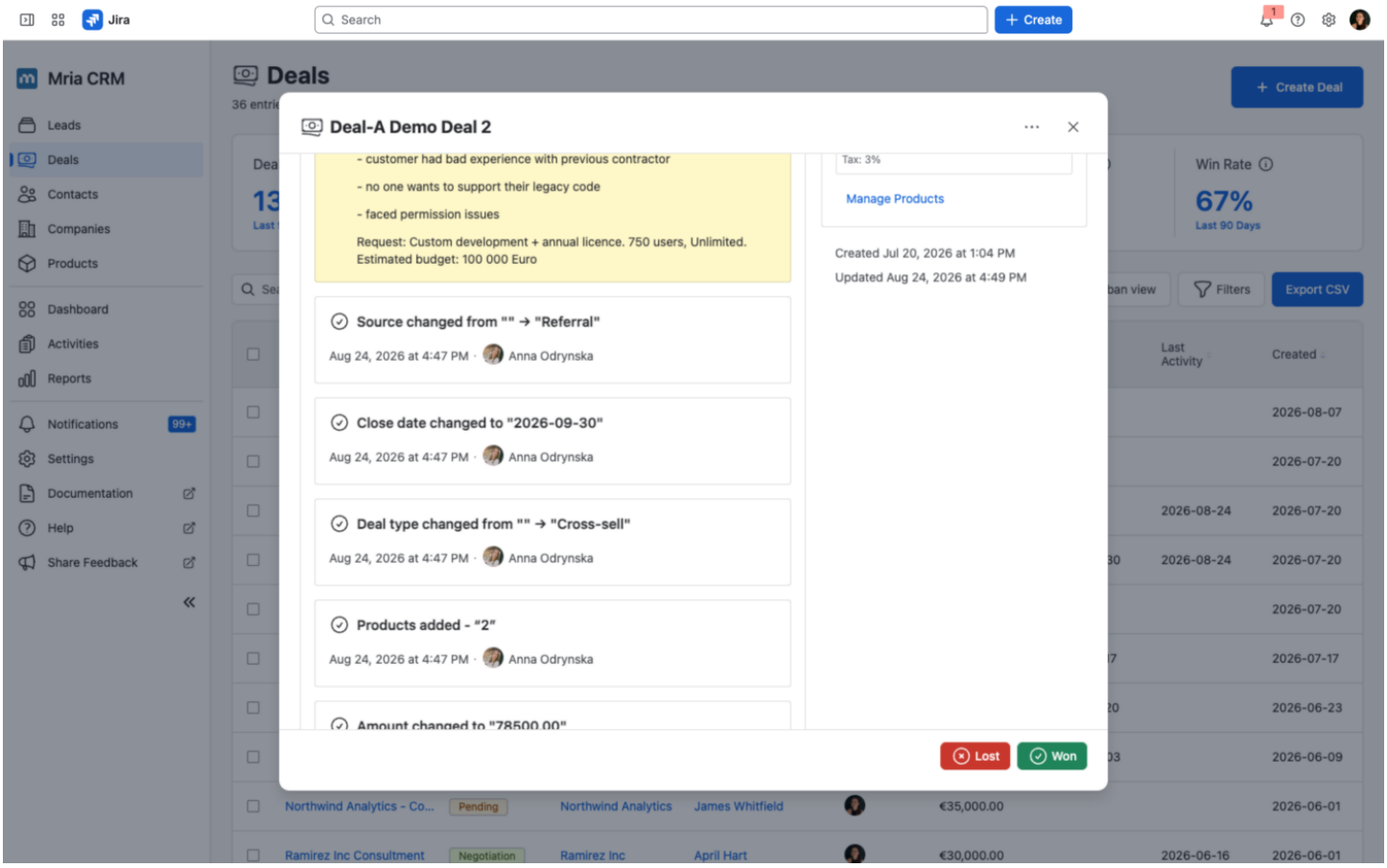


6. Linked Data

Contacts and Companies

A Deal can be linked to **several Contacts and several Companies**. Both live in their own collapsible panels on the right-hand side of the Deal view, with **+ Add Contacts** and **+ Add Companies**.

- Each panel shows a count, so you can see at a glance how many people and organizations are involved.
- One Contact and one Company are marked **Primary**, shown with a badge. The Primary records are what appear in the **Primary Contact** and **Primary Company** columns of the table view and on Kanban cards.
- Neither is mandatory — a Deal can exist with no Contacts and no Companies at all.



Why several Companies? Multi-party deals are the reason — a partner or reseller alongside the end customer, a parent company and the subsidiary actually signing, or a procurement

intermediary. Previously you had to pick one and record the rest in a note.

The Contacts you link also drive email: the **To** field in the composer on a Deal is pre-filled from the Deal's Contacts. See Gmail Integration / Outlook Integration.

Tip: A Contact that is the Primary Contact on any Deal cannot be deleted. Reassign the Primary to another Contact on that Deal first.

Activities

Notes, Meetings, Tasks, and Files related to a Deal appear on their own tabs in the Deal view, alongside **Emails**. See more details in the Activities page.

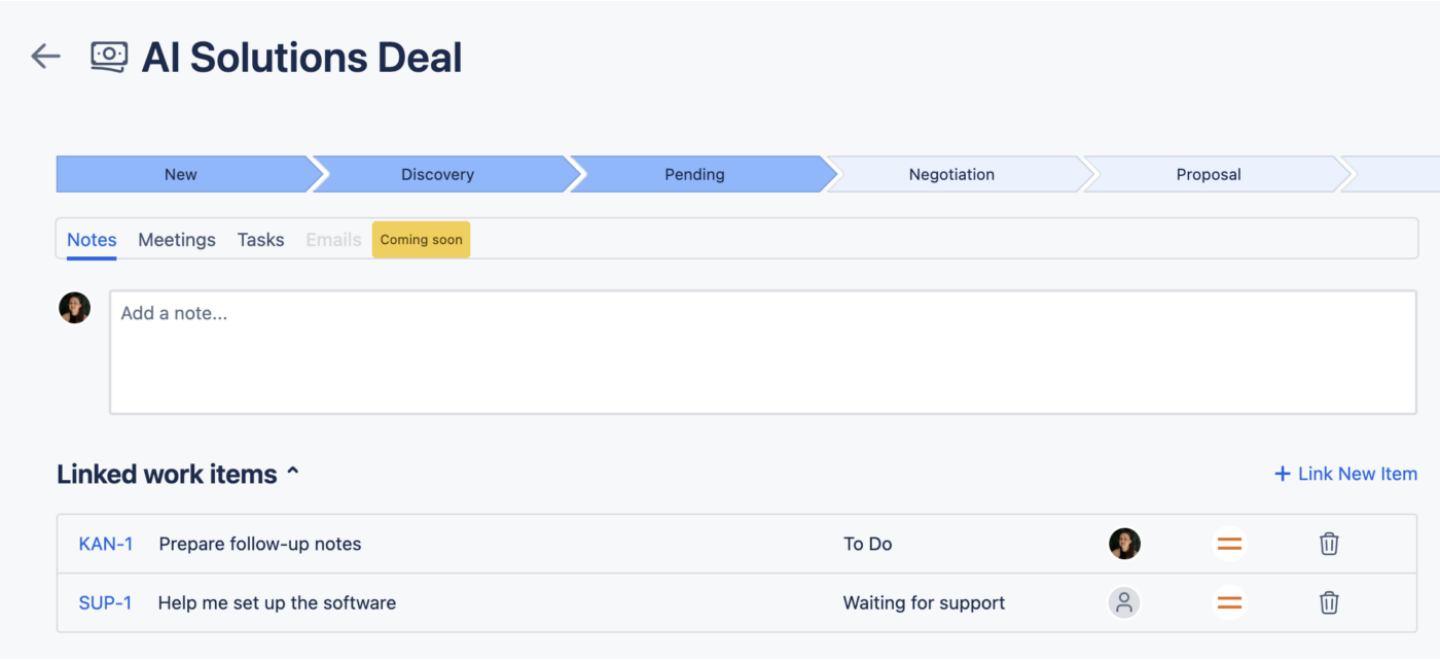
Products

Products from the catalog can be added to a Deal, each with its own quantity, price adjustment, discount and VAT. Those adjustments live on the Deal and leave the catalog record untouched.

Each line has a VAT mode — Exclusive, Inclusive or None — and the Deal shows **Net**, **VAT** and **Total**. The discount always comes off first, and the Total is the Deal amount. See Products for the formulas and a worked example.

Jira Links

Jira issues can be connected to Deals from the **Linked items** section and are visible in both CRM and Jira (in the right panel of Jira work items).



Arranging this page

Administrators can move, hide or collapse the blocks of the Deal page and reorder the fields in Details — in Settings → Layouts, or from ⚙ **Configure** at the foot of the side panel. See Layouts. Deals can have a different layout in each pipeline.

7. Custom Fields on Deals

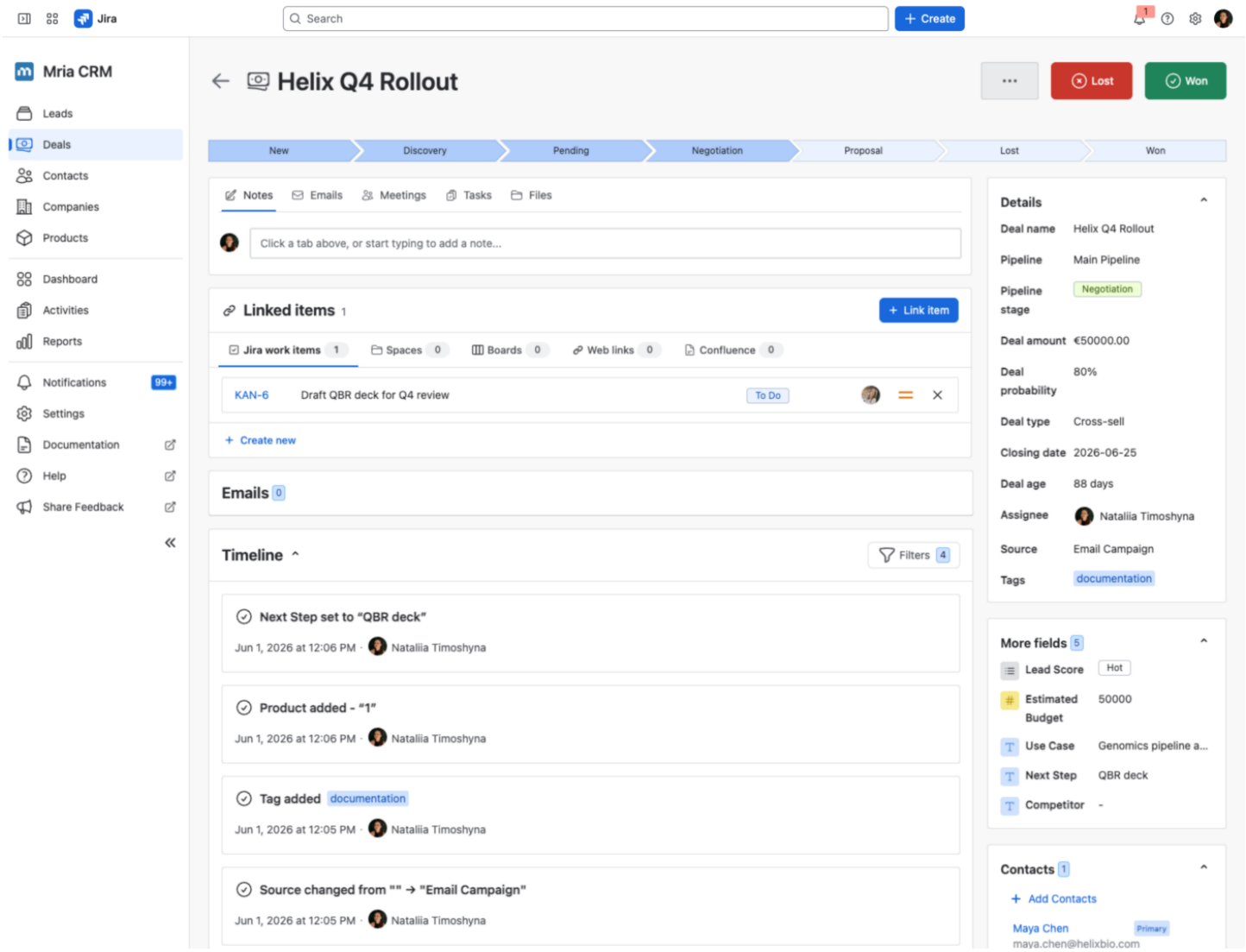
Custom fields let your team capture extra information on every Deal beyond the standard fields. For example, you can add **Next Step** to log the immediate follow-up, **Competitor** to track who else is in the deal, or **Use Case** to record what the customer is buying for.

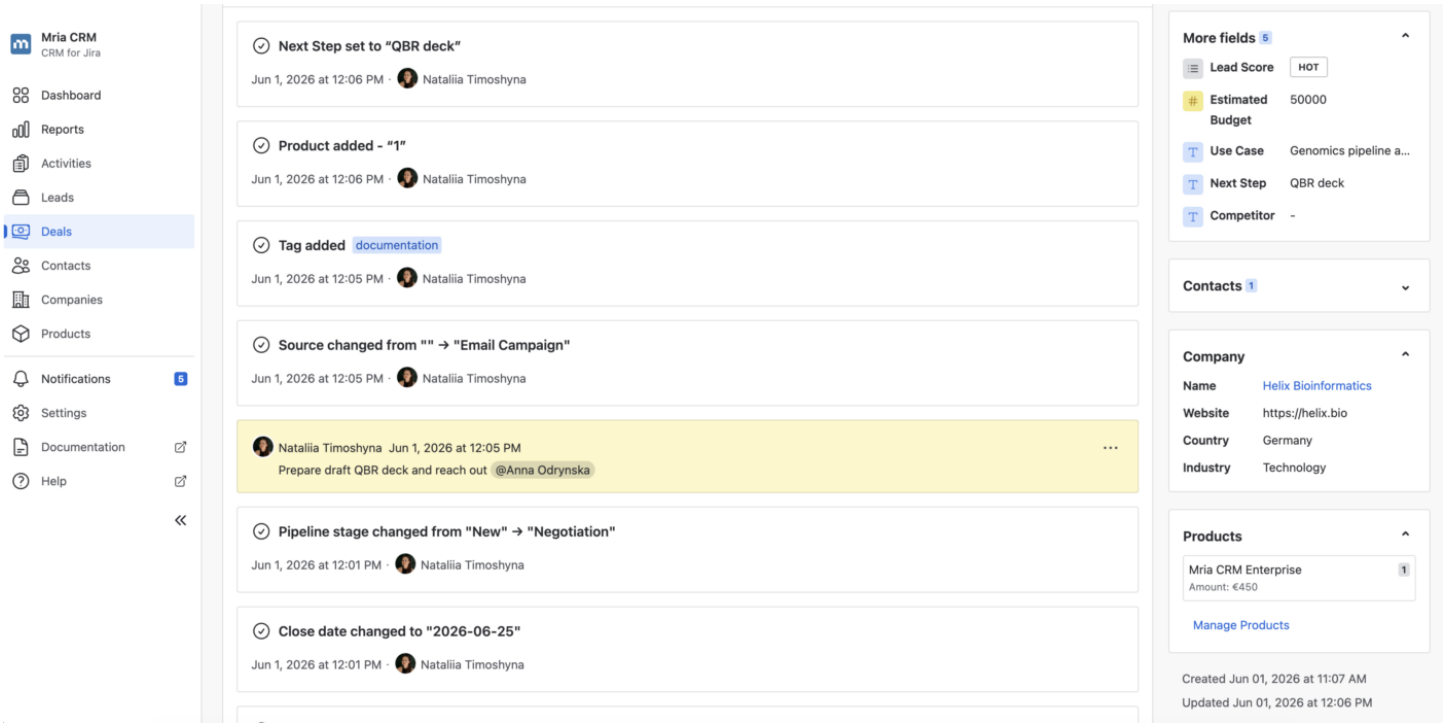
Custom fields are managed by administrators under **Settings → Custom Fields**. See Custom Fields for the full setup guide and field type reference.

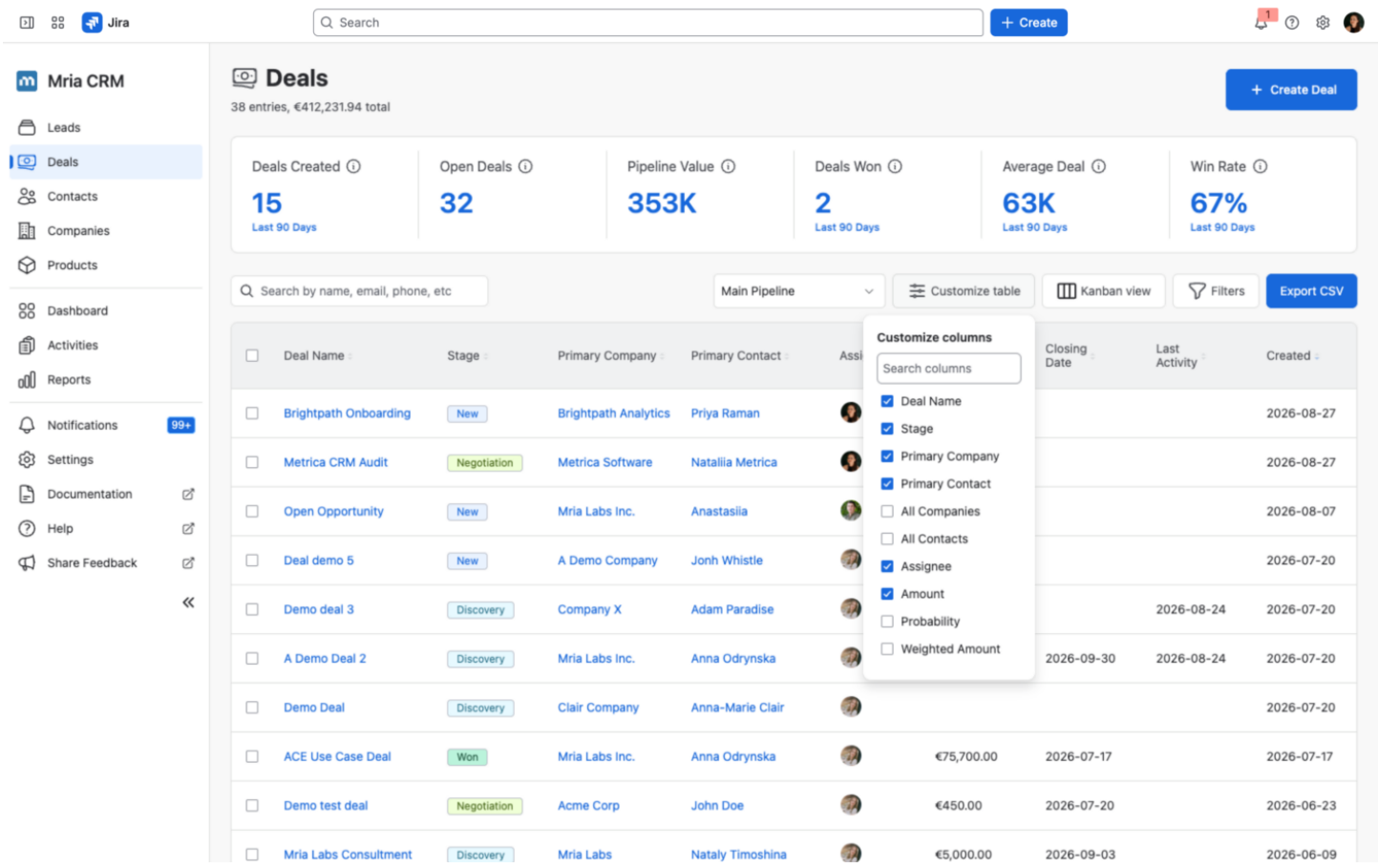
Once a custom field is created on the Deal entity, it shows up in several places:

- **Deal detail view** — populated values appear in the **More fields** section on the right-hand panel. Click any field to edit inline.
- **Table view** — open the **Customize table** menu and toggle any custom field on to add it as an optional column.

- **Filters panel** — every custom field appears under the **Advanced** tab as a filterable criterion (see Filtering Deals below).
- **CSV export** — visible columns are included in the export, so custom fields show up in the CSV when they're toggled on in the table view.







Change log: Every edit to a custom field is recorded on the Deal's **Timeline** tab — who changed which field, when, and the value before and after. History is preserved even after a field is

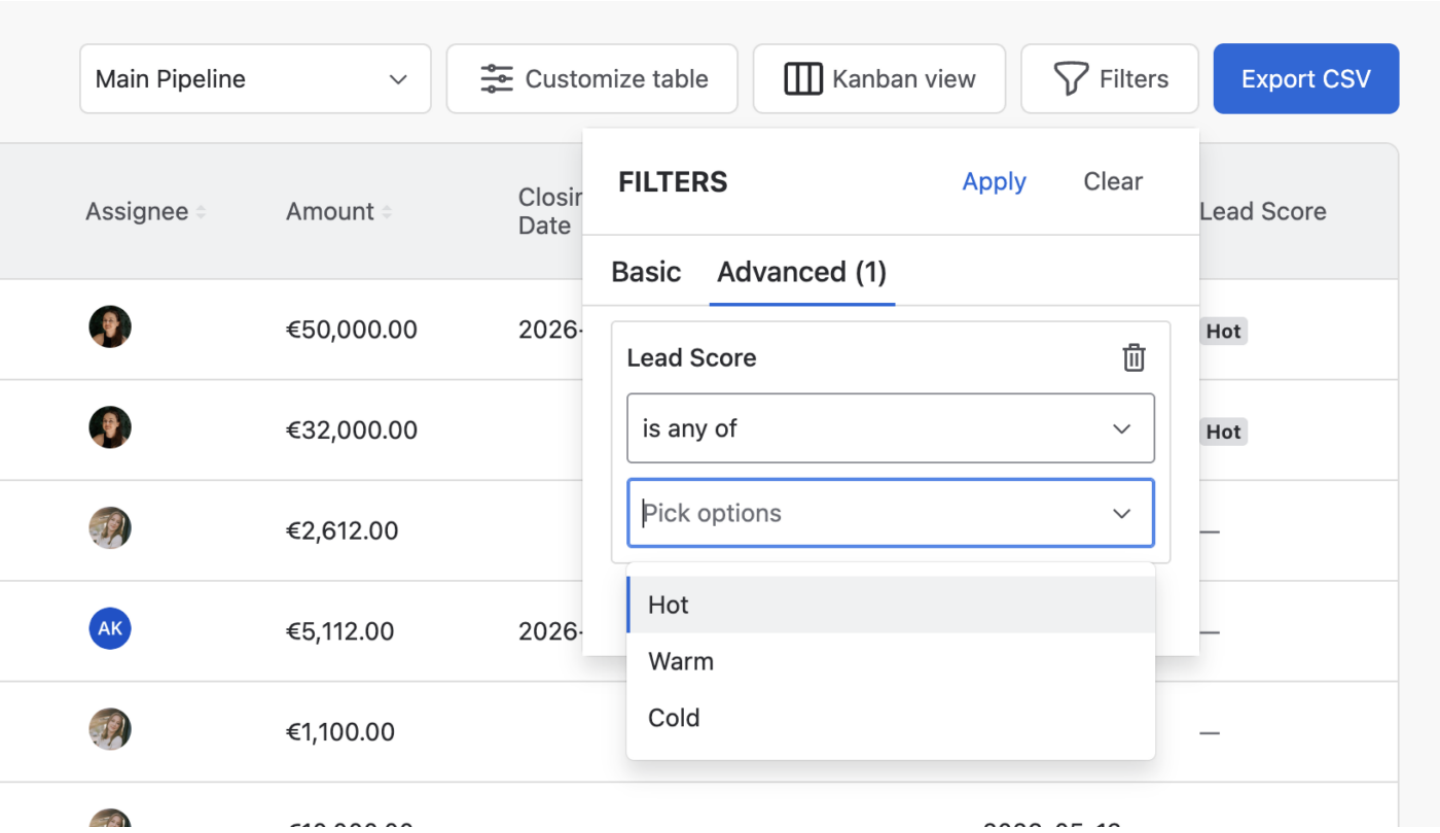
deleted.

Carryover from Lead: When a Lead is converted into a Deal, custom fields with the same name and same type on both entities carry their values over automatically. See Lead to Deal Conversion for the full rule.

8. Filtering Deals

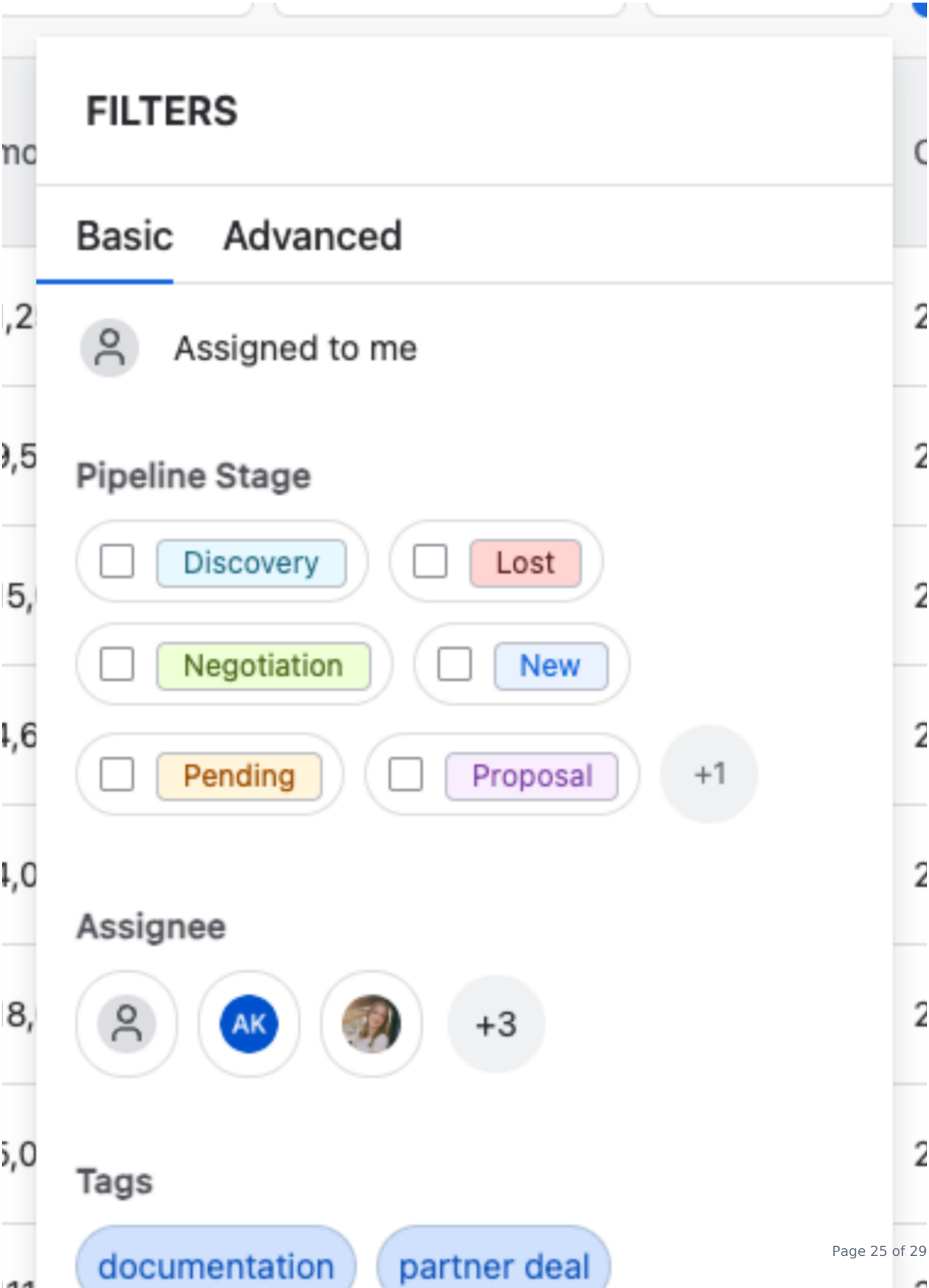
To help you quickly narrow down your list of Deals, you can use filters available in both Table and Kanban views. The Filters panel has two tabs:

- **Basic** — the standard filter set, always available.
- **Advanced** — every custom field on the Deal is automatically available here as a filterable criterion. The available comparators depend on the field type (for example, dropdowns use **is any of**, numbers use **is greater than**, dates use **is on or before**).



Available **Basic** filters include:

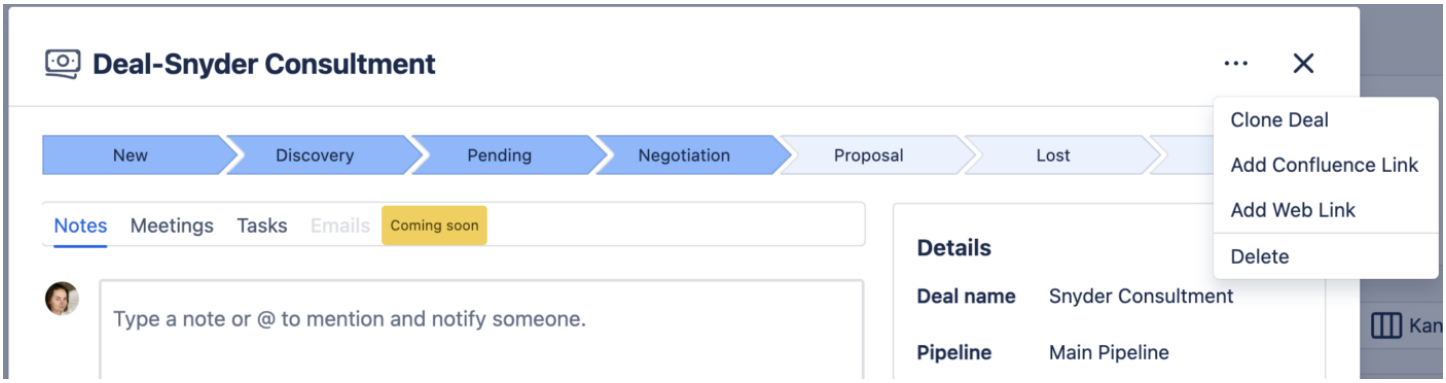
- **Pipeline Stage** (Table view only) – view only Deals in specific stages (e.g., New, Negotiation, Proposal) — Won and Lost included, so closed Deals can be listed on their own.
- **Assignee** – show only Deals assigned to you or selected team members.
- **Tags** – filter by custom tags.
- **Deal Type, Source, Product, Age, Created Date** – refine your list further with additional options.
- **Deal probability** – filter Deals by their probability percentage (useful for spotting at-risk Deals or focusing on near-certain ones).
- **Weighted amount** – filter Deals by the amount they contribute to the forecast. It sits under Deal probability in Basic.


FILTERS
Basic
Advanced
Assigned to me
Pipeline Stage
Discovery
Lost
Negotiation
New
Pending
Proposal
+1
Assignee
AK
+3
Tags
documentation
partner deal

Filters are optional. They don't change your Deals, just how they're displayed in the list.

9. Cloning Deals

Mria CRM allows you to quickly create a new Deal based on an existing one using the **Clone Deal** option in the **··· menu** of the Deal view.



When you select **Clone Deal**, the newly cloned Deal opens immediately in full view so you can start making adjustments right away.

The cloned Deal includes:

- The same Deal name, prefixed with **"CLONE – "** (you can rename it at any time).
- Pipeline stage reset to the **first stage** of the pipeline (e.g., *New*).
- All key Deal details, including:
  - Closing date
  - Linked Jira work items
  - Confluence and Web links
  - Products
  - Primary and secondary Contacts
- Deal age reset to **1 day**, as it is treated as a newly created Deal.

Important: Activities **are not cloned**. Tasks, Meetings, and Notes from the original Deal will not carry over.

10. Deleting a single Deal

To delete one Deal, open the `...` **menu in the top right corner** of a Deal full view and select **Delete**.

- Deals can be hard deleted at any time.
- The Deal itself is removed, but history in linked Contacts and Companies remains.

11. Bulk actions

From the **table view** you can update or delete many Deals at once — re-assigning a territory, moving a batch of stalled Deals to a new stage, or clearing out test records.

Selecting Deals

1. Apply **Filters** if you want to target a specific set — for example every Deal in a pipeline you're retiring.
2. Tick the checkbox on each row. The **header checkbox** selects every Deal **on the current page**.
3. A bulk actions bar appears at the bottom showing the count, for example **2 selected**. Click **Select all N** in that bar to extend the selection to **every Deal matching your current filters**.
4. The **×** at the end of the bar clears the selection.

> **The count in the bar is the number you're about to act on.** Read it before you click anything — it is the difference between changing a page and changing the whole filtered set.

Edit fields

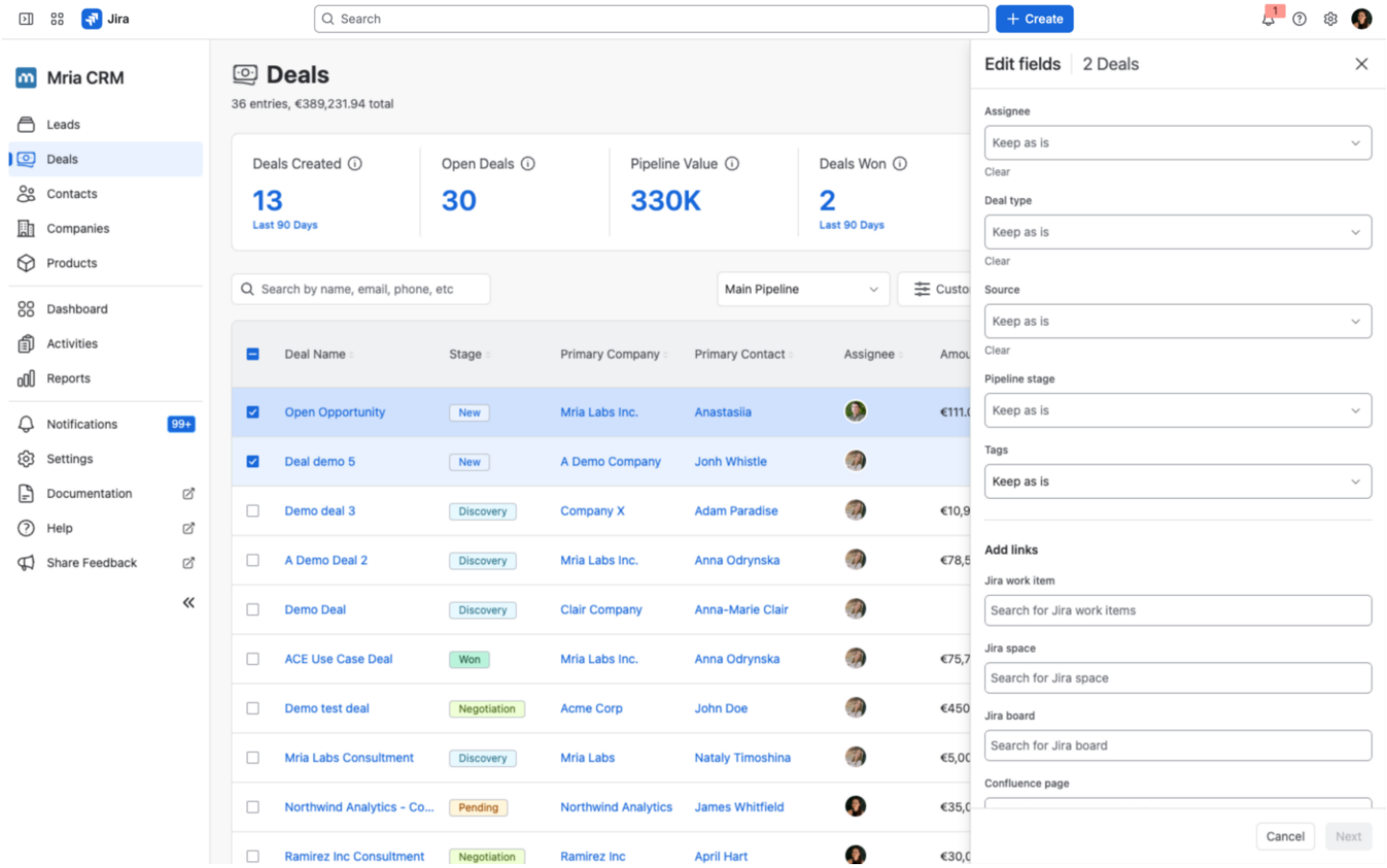
Click **Edit fields** to open a panel that applies your changes to every selected Deal.

Every field starts at **Keep as is**, so nothing changes unless you deliberately set it.

Fields available on Deals:

- **Assignee**
- **Deal type**
- **Source**

- **Pipeline stage**
- **Tags**



Single-value fields (Assignee, Deal type, Source) also offer a **Clear** link to empty them across the selection. **Tags** offers the multi-value choices — **Add new**, **Replace all**, **Find and remove**, and **Remove all** — described on the Leads page.

Below the fields, **Add links** attaches the same link to every selected Deal — a **Jira work item**, **Jira space**, **Jira board**, **Confluence page**, or **Web link**.

Click **Next** to review, then confirm to apply.

> **Deal amount, probability, and closing date are not bulk-editable**, and neither are Products — these carry per-Deal pricing and forecasting that rarely make sense to set identically across a batch. Edit them on the individual Deal.

Delete

Click **Delete** in the bulk actions bar and confirm. If any record in the selection can't be deleted, it is **skipped** and the rest of the batch continues.

> Bulk delete is **permanent** and cannot be undone. Review your filters and the selected count before confirming.

Bulk actions work the same way on Leads, Contacts, Companies, and Products.