

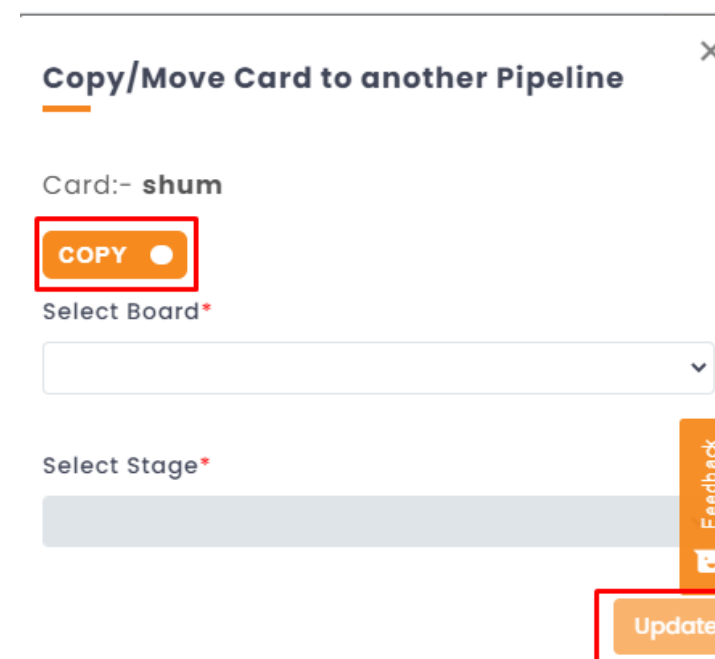
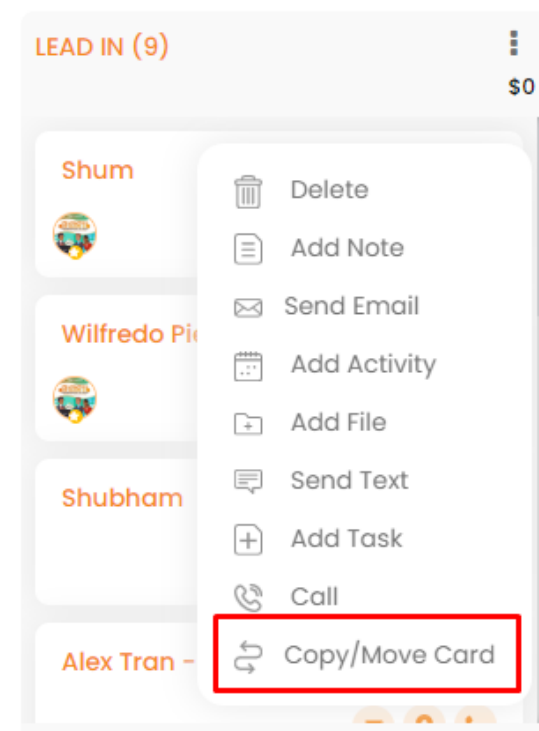
WITH AMANDA RICHARDS  
MONDAY OCTOBER 26, 2020

# Daily Bite Size Training

Topic:  
Copy or Move a Deal Card

# Copy Deal Card

COPYING A CARD ENABLES YOU TO DUPLICATE A CARD FOR A SPECIFIC BOARD & STAGE



## Why Copy a Deal Card instead of move?

- Sometimes journey of a card does not end with winning/losing a deal
- It continues to next Pipeline eg - Onboarding, Assessments, Review etc.
- **Moving a Won Card** to next Pipeline may not be best practice

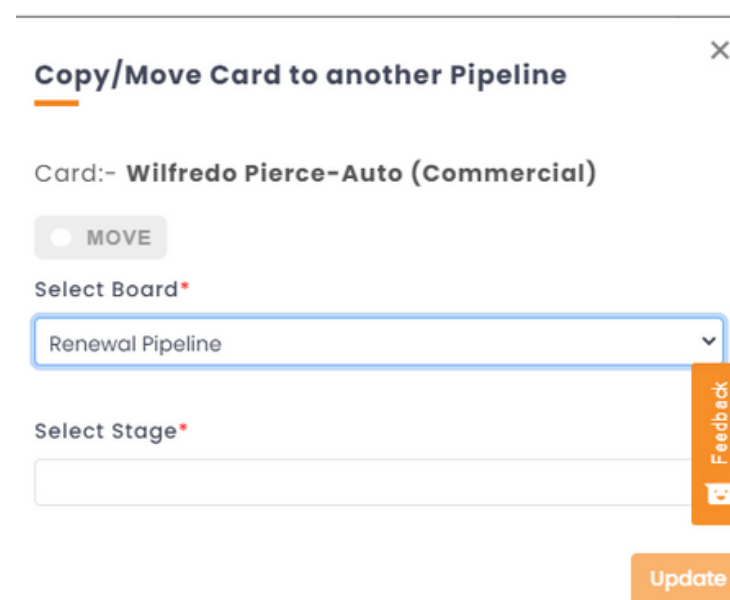
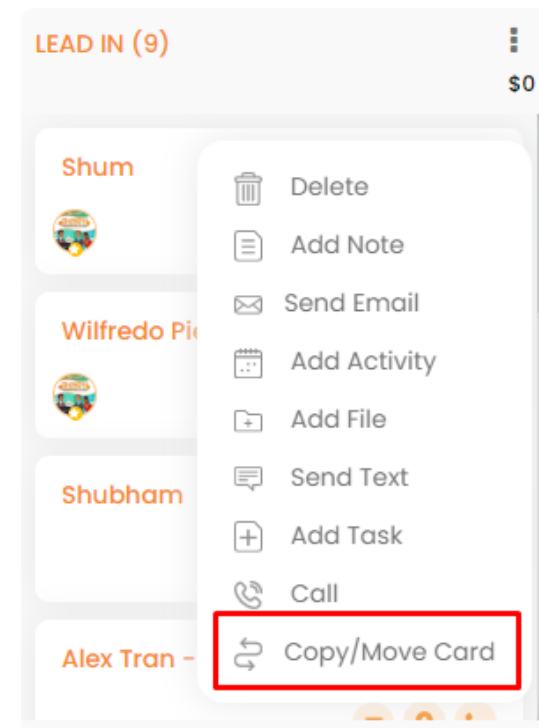
## Why???

Sales Won Data will be decreased by 1

Resulting in no changes in won/lost count

# Move a Deal Card

THIS ACTION MOVES THE CARD TO  
NEW PIPELINE BOARD & STAGE



What happens to card info  
when moved?

All of the card details will shift to another pipeline

Pro tip: You can also drag and drop the card when  
moving it to a different Pipeline

# THANK YOU!

To learn more please visit:

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