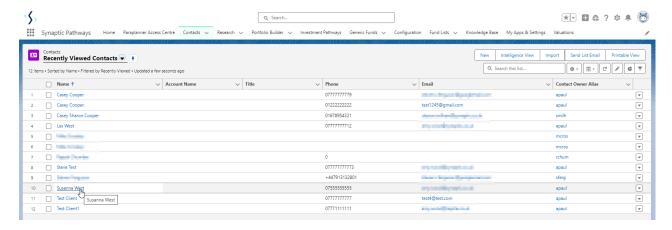
## Creating a Special Deal on a Contact record

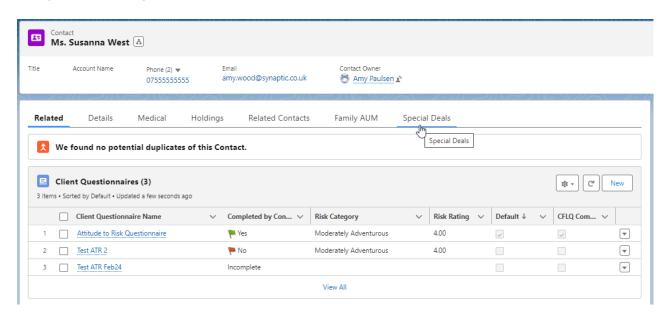
Last Modified on 18/04/2024 10:41 am BST

Client special deals will be used above firm, network and portfolio deals. They are created within the Contact record.

Navigate to the contact record:



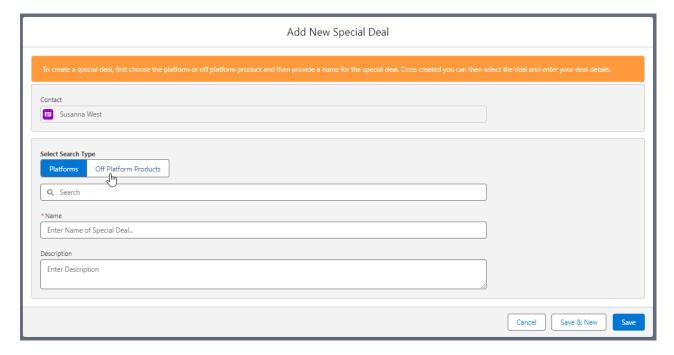
Navigate into the **Special Deals** tab:



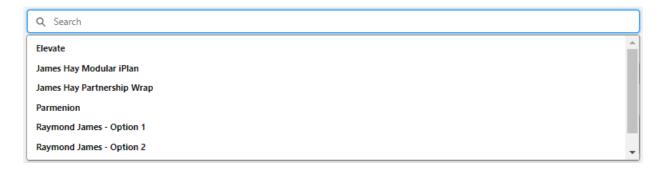
Click the **New** button:



## Select Platforms or Off-Platforms Products

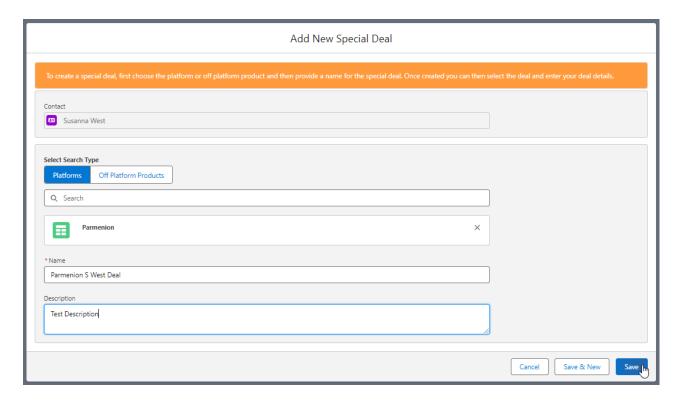


Select a Platform/Off-Platform Product from the drop down:

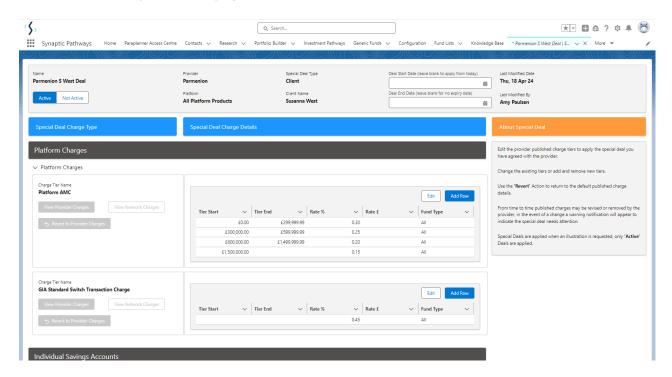


Complete the **Name** field. The description box is optional.

## Save

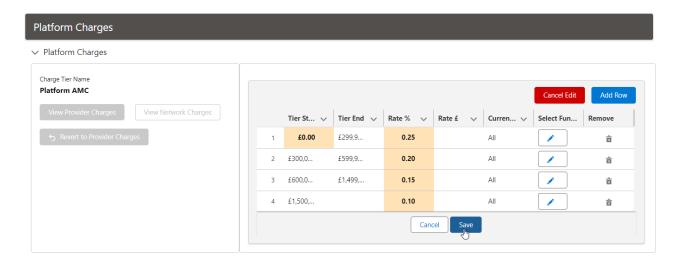


This will load the Special Deal page.

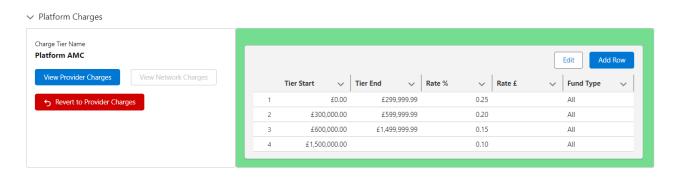


Client special deals are completed in the same way as firm special deals. See article Creating Special Deals or view video Creating Special Deals - Video

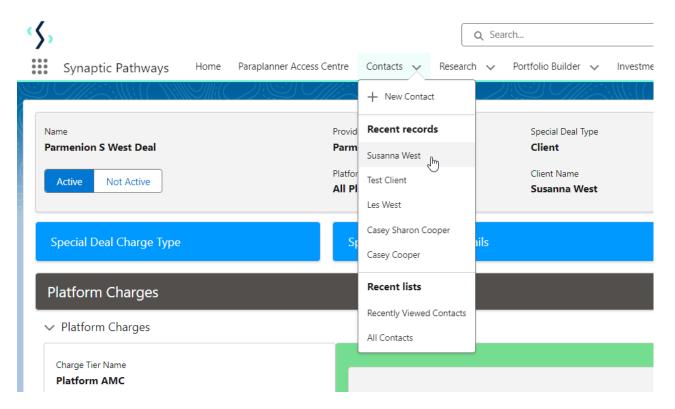
In the below example we have tweaked the Rate% and Save



Once saved, the special deal will be highlighted in green:



Navigate back to the contact once complete:



View your created deal

