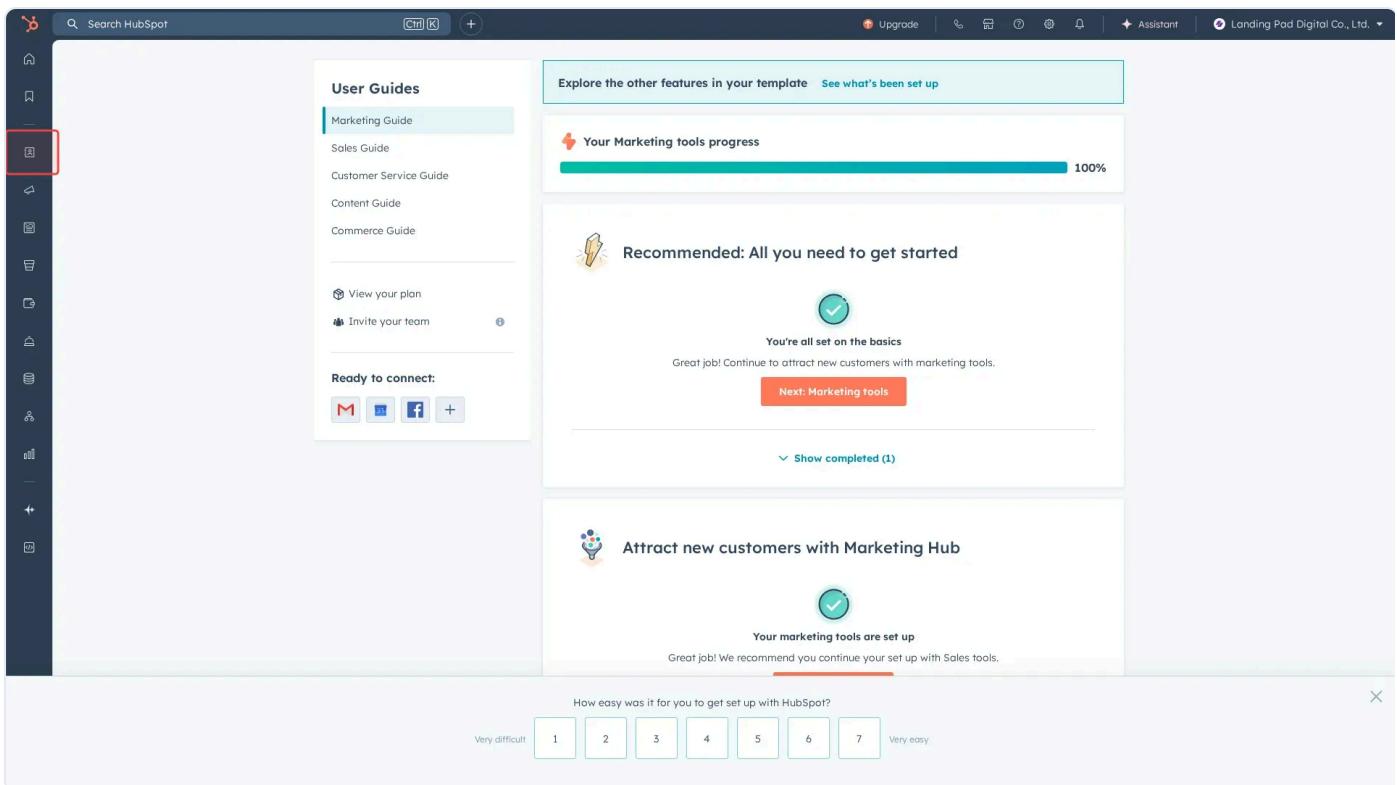


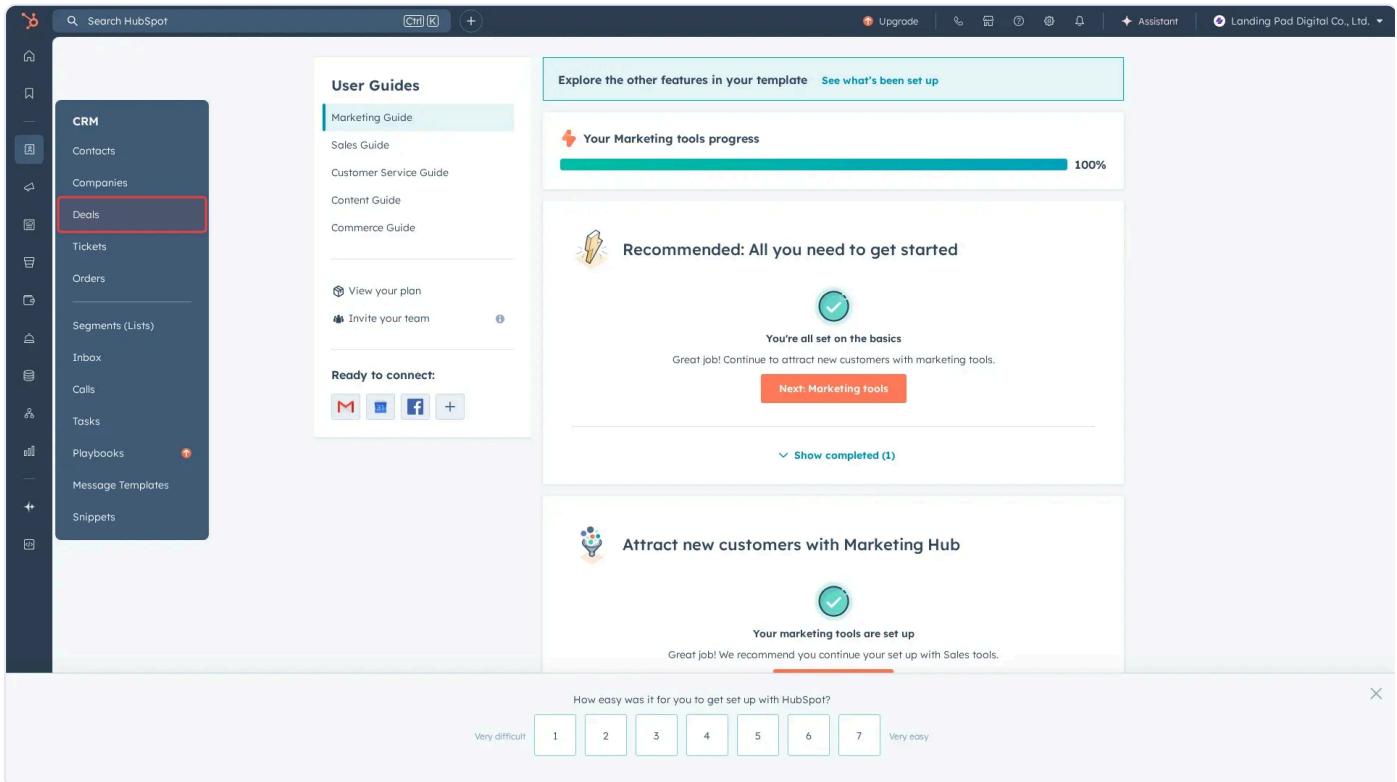
Create a new deal called Website Redesign with amount 5000

HubSpot 11 steps · 9m 8s

1 Click CRM in left sidebar to expand menu.

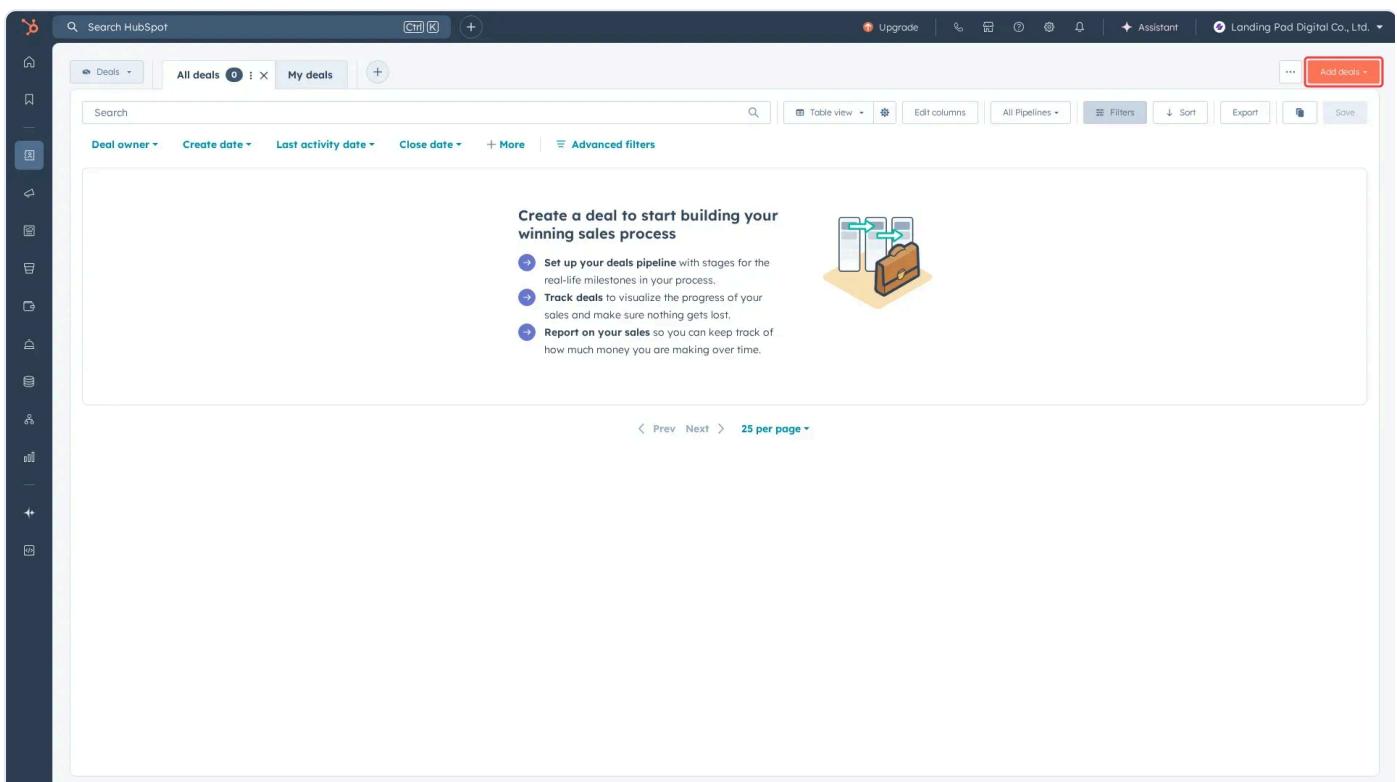


2 Click 'Deals' in CRM submenu to access deals.



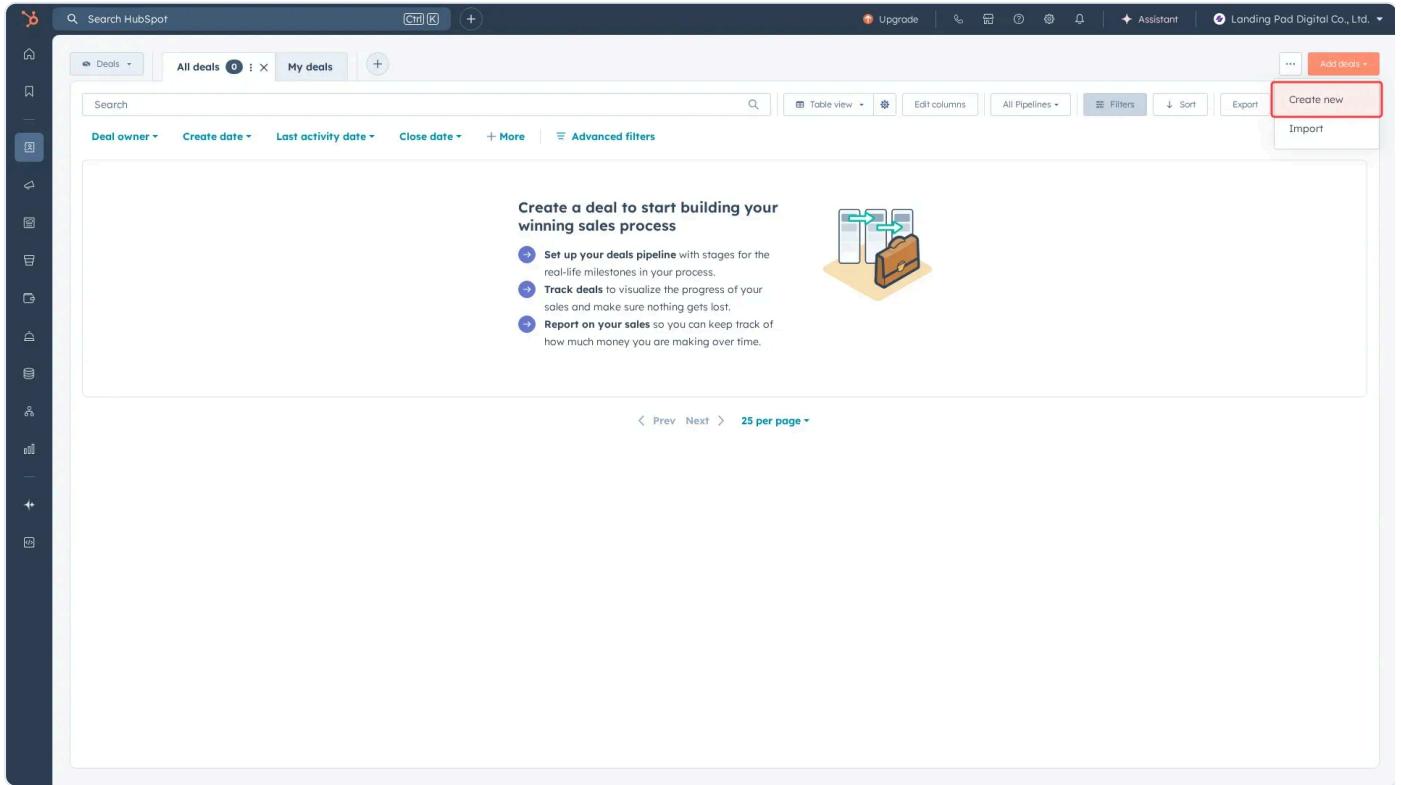
The screenshot shows the HubSpot CRM interface. On the left, a sidebar menu for 'CRM' is open, with 'Deals' highlighted with a red box. The main content area displays 'User Guides' for Marketing, Sales, Customer Service, Content, and Commerce. It also shows 'Your Marketing tools progress' at 100% completion and a 'Recommended: All you need to get started' section. Below that is an 'Attract new customers with Marketing Hub' section. At the bottom, a survey asks 'How easy was it for you to get set up with HubSpot?' with a scale from 1 (Very difficult) to 7 (Very easy).

3 Click 'Add deals' button to open deal creation form.



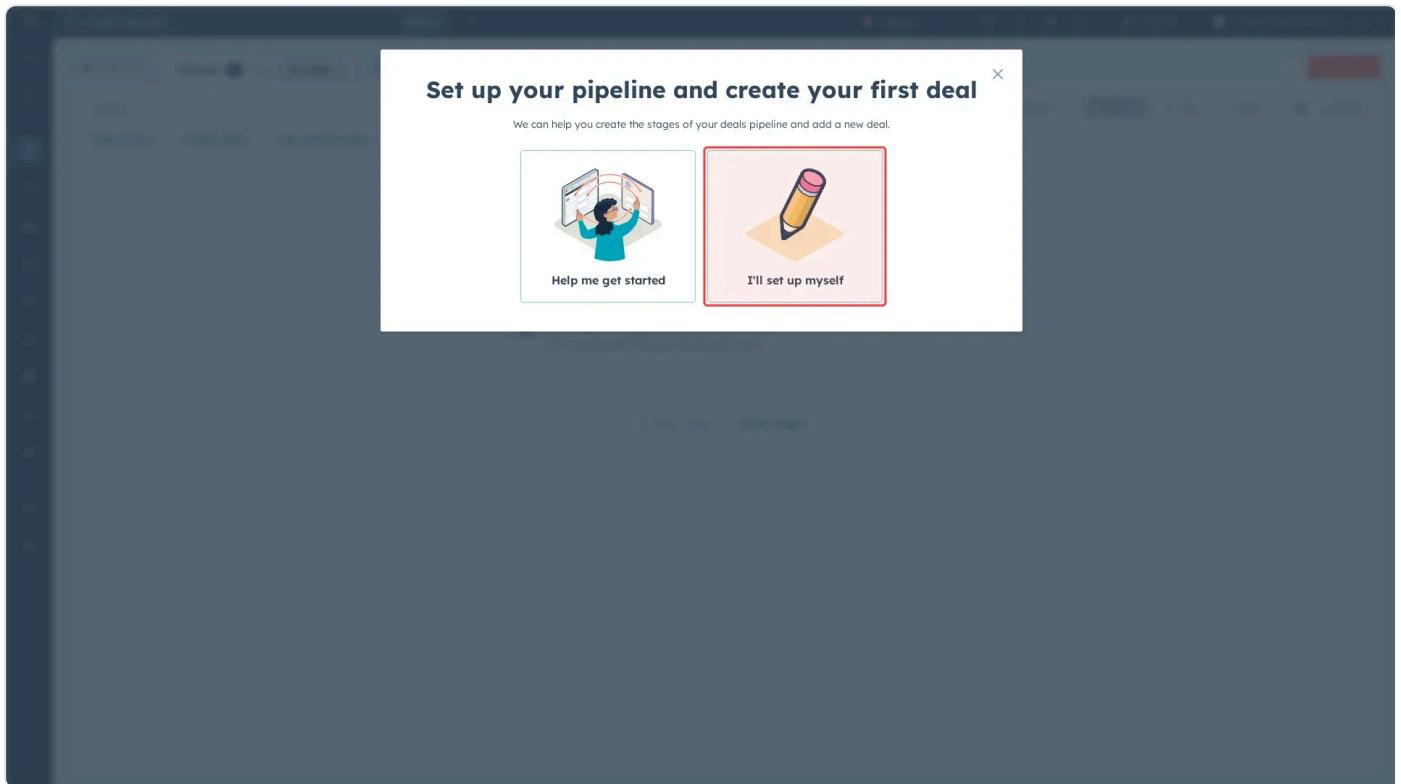
The screenshot shows the HubSpot CRM deals list page. The top navigation bar includes 'Deals', 'All deals (0)', 'My deals', and an 'Add deals' button highlighted with a red box. The main area features a search bar and filter options for 'Deal owner', 'Create date', 'Last activity date', 'Close date', and 'Advanced filters'. A central call-to-action box encourages users to 'Create a deal to start building your winning sales process' with three steps: 'Set up your deals pipeline', 'Track deals', and 'Report on your sales'. At the bottom, there are navigation buttons for 'Prev' and 'Next', and a '25 per page' dropdown.

4 Click 'Create new' to open deal creation form.



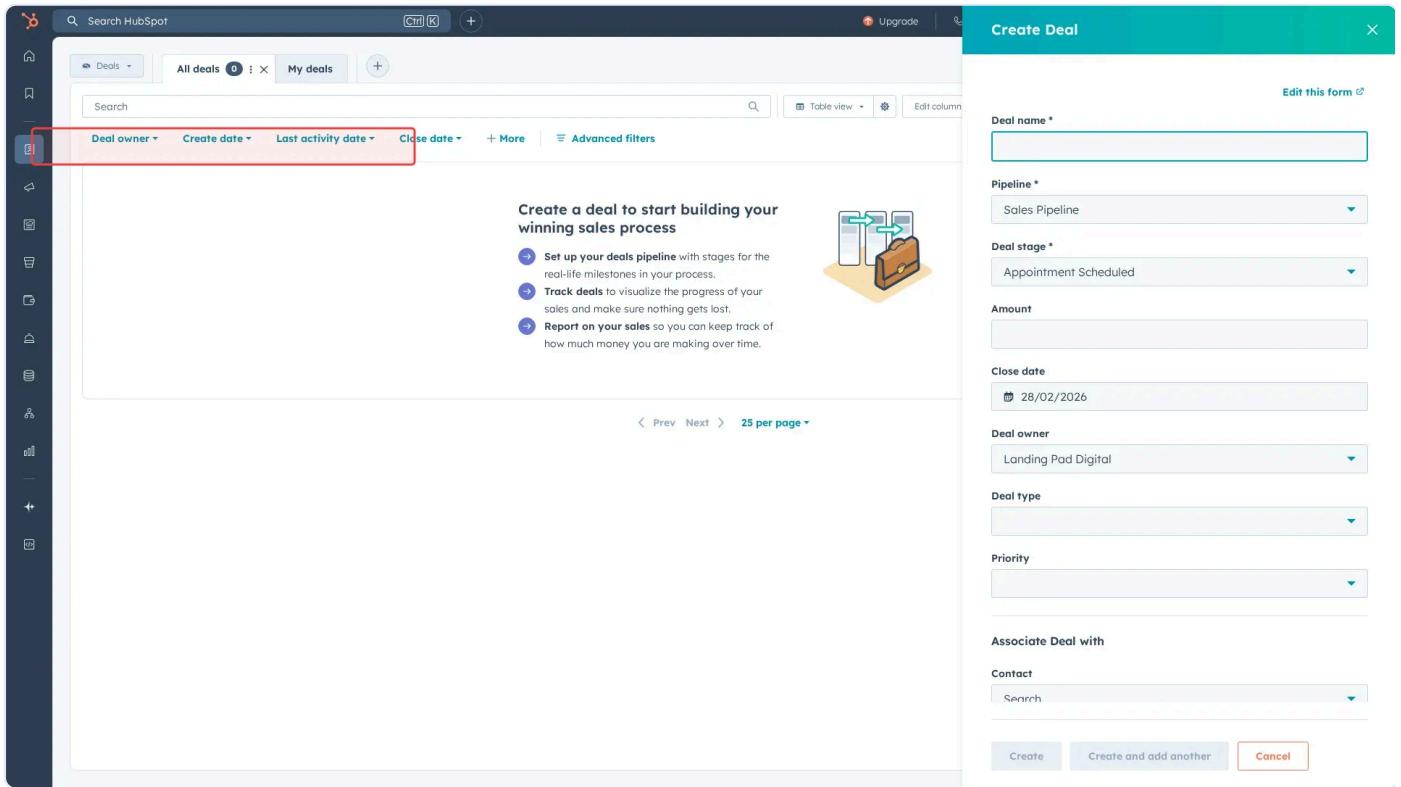
The screenshot shows the HubSpot Deals dashboard. At the top right, there is a red box highlighting the 'Create new' button. The dashboard features a search bar, filter options (Deal owner, Create date, Last activity date, Close date, More, Advanced filters), and a main content area with a heading 'Create a deal to start building your winning sales process'. Below this are three bullet points: 'Set up your deals pipeline with stages for the real-life milestones in your process.', 'Track deals to visualize the progress of your sales and make sure nothing gets lost.', and 'Report on your sales so you can keep track of how much money you are making over time.' To the right of the text is an illustration of a briefcase on a desk with a laptop and a smartphone. At the bottom of the main area are navigation buttons for 'Prev' and 'Next' and a '25 per page' dropdown.

5 Click 'I'll set up myself' to create deal manually.



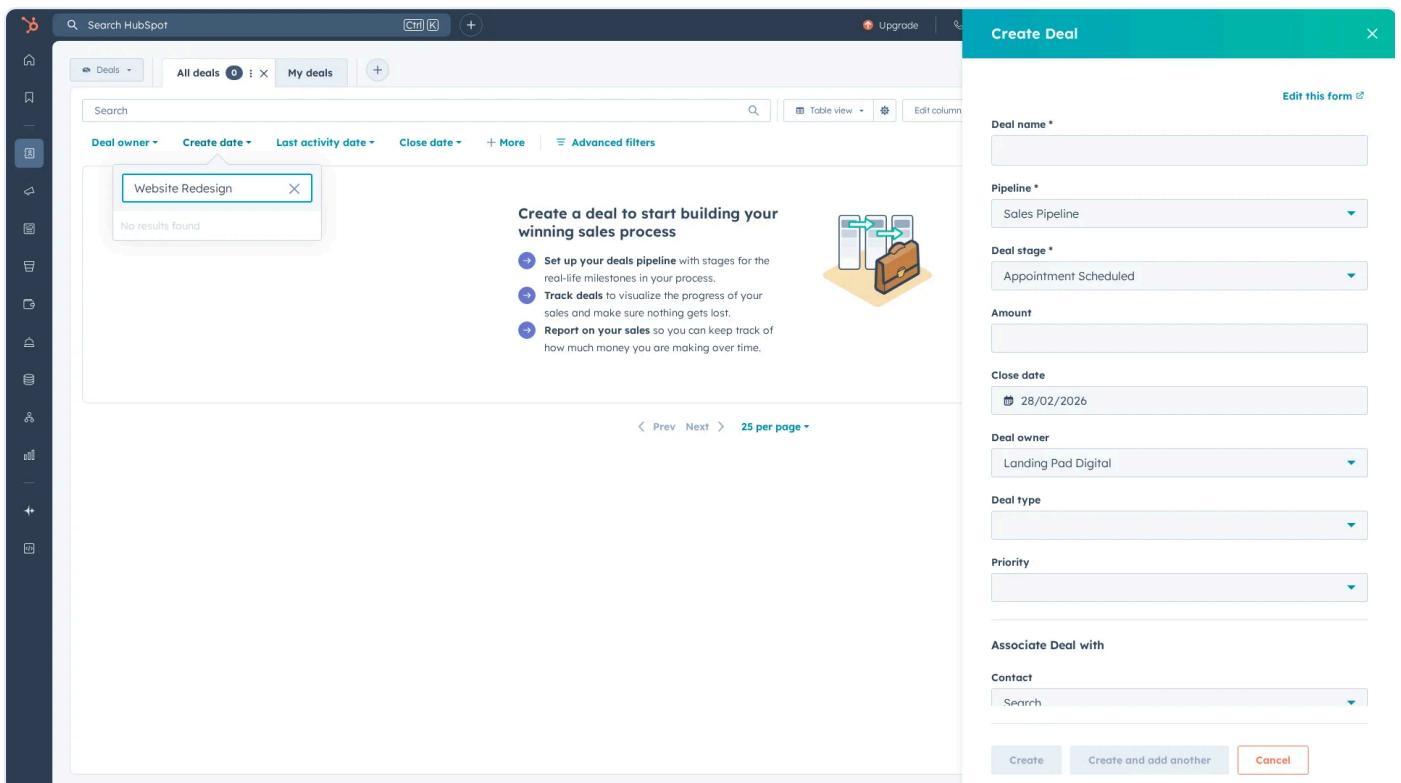
The screenshot shows a modal window titled 'Set up your pipeline and create your first deal'. The modal contains text: 'We can help you create the stages of your deals pipeline and add a new deal.' Below this are two options: 'Help me get started' (with an illustration of a person looking at a document) and 'I'll set up myself' (with an illustration of a pencil on a notepad). The 'I'll set up myself' option is highlighted with a red box.

6 Type 'Website Redesign' in the Deal name field.



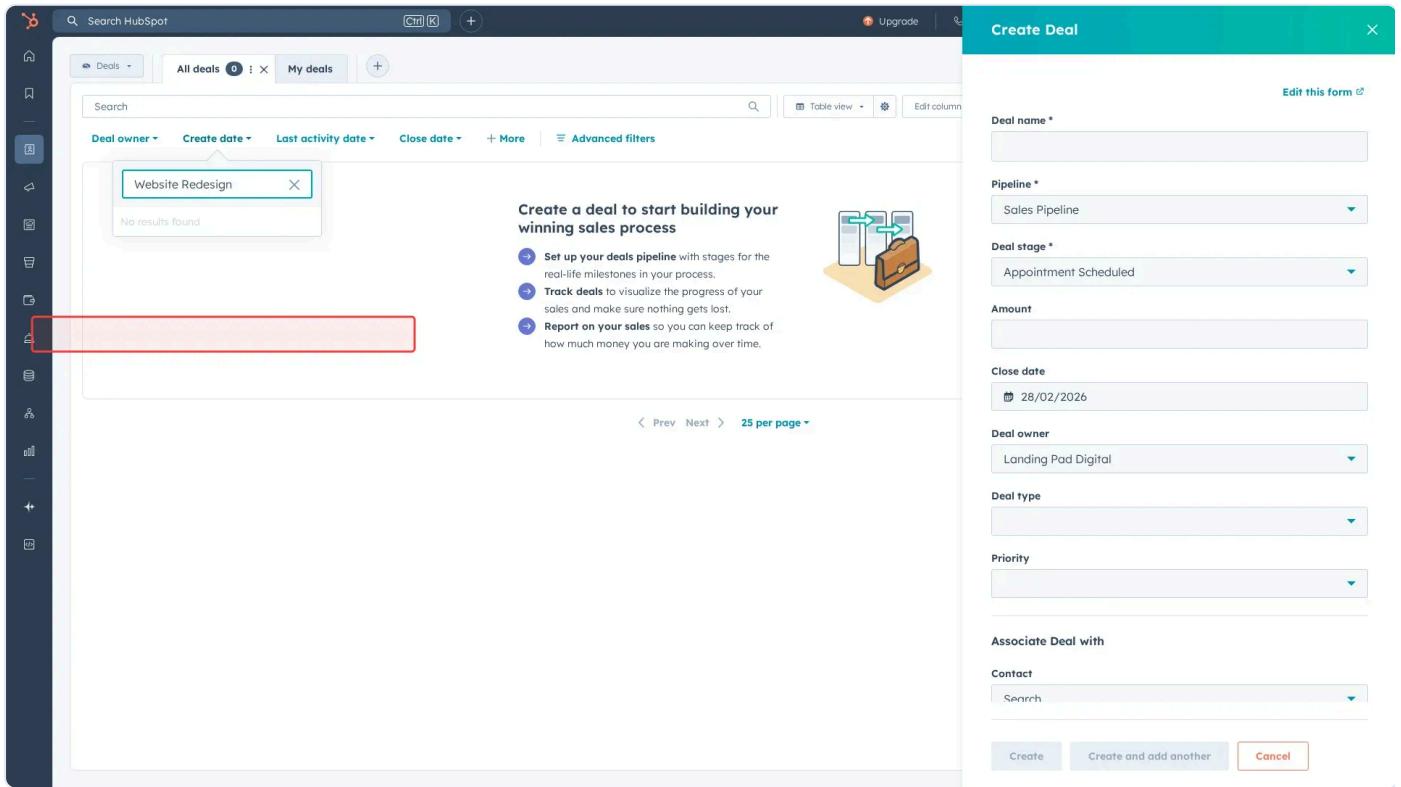
The screenshot shows the HubSpot interface. On the left is the 'Deals' list view with a search bar and filter options (Deal owner, Create date, Last activity date, Close date, More, Advanced filters). The main area displays a 'Create a deal to start building your winning sales process' guide with three steps: Set up your deals pipeline, Track deals, and Report on your sales. On the right is the 'Create Deal' modal, which includes fields for Deal name (with a red box around it), Pipeline (Sales Pipeline), Deal stage (Appointment Scheduled), Amount, Close date (28/02/2026), Deal owner (Landing Pad Digital), Deal type, Priority, and Associate Deal with (Contact search bar). Buttons at the bottom are Create, Create and add another, and Cancel.

7 Scroll to find the Amount field in form.



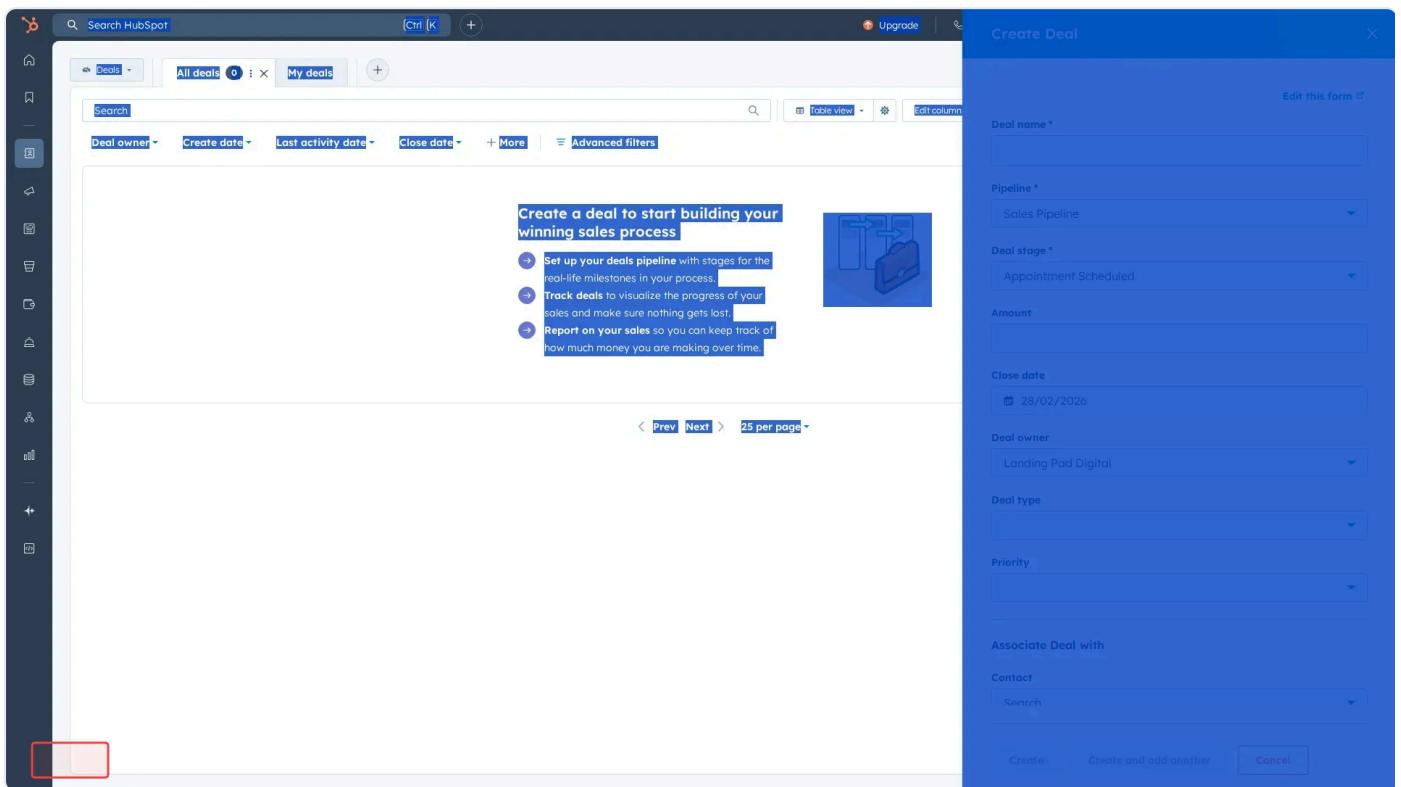
The screenshot shows the HubSpot interface. The left side is the 'Deals' list view with a search bar containing 'Website Redesign' and the result 'No results found'. The right side shows the 'Create Deal' modal. The 'Amount' field is highlighted with a red box. Other fields in the modal include Deal name, Pipeline (Sales Pipeline), Deal stage (Appointment Scheduled), Close date (28/02/2026), Deal owner (Landing Pad Digital), Deal type, Priority, and Associate Deal with (Contact search bar). Buttons at the bottom are Create, Create and add another, and Cancel.

8 Type '5000' in the Amount field.



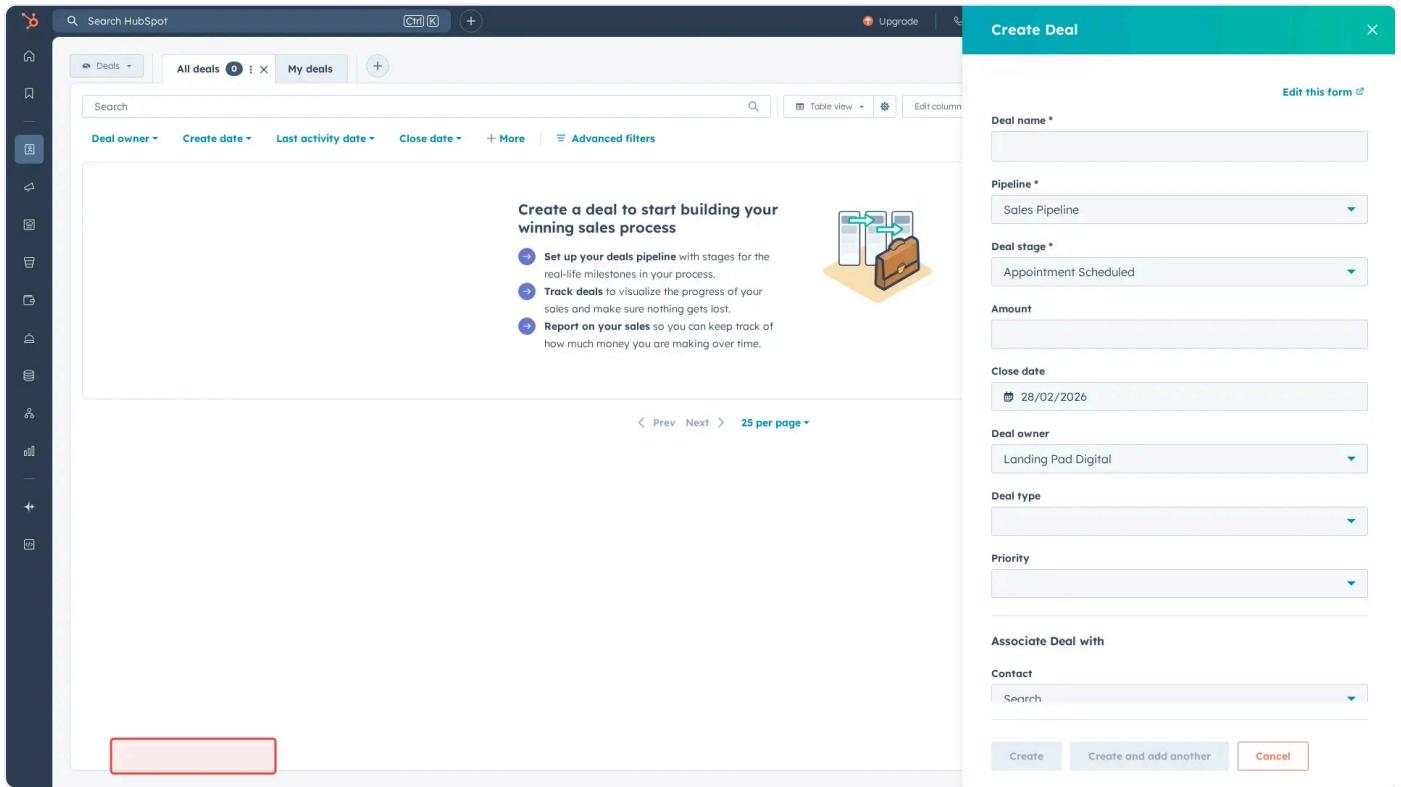
The screenshot shows the HubSpot interface. On the left is the 'Deals' list view with a search bar and filters. A red box highlights the search bar. On the right is the 'Create Deal' modal, which is currently empty except for the 'Deal name' field, which is also highlighted with a red box.

9 Click 'Create' button to save the deal.



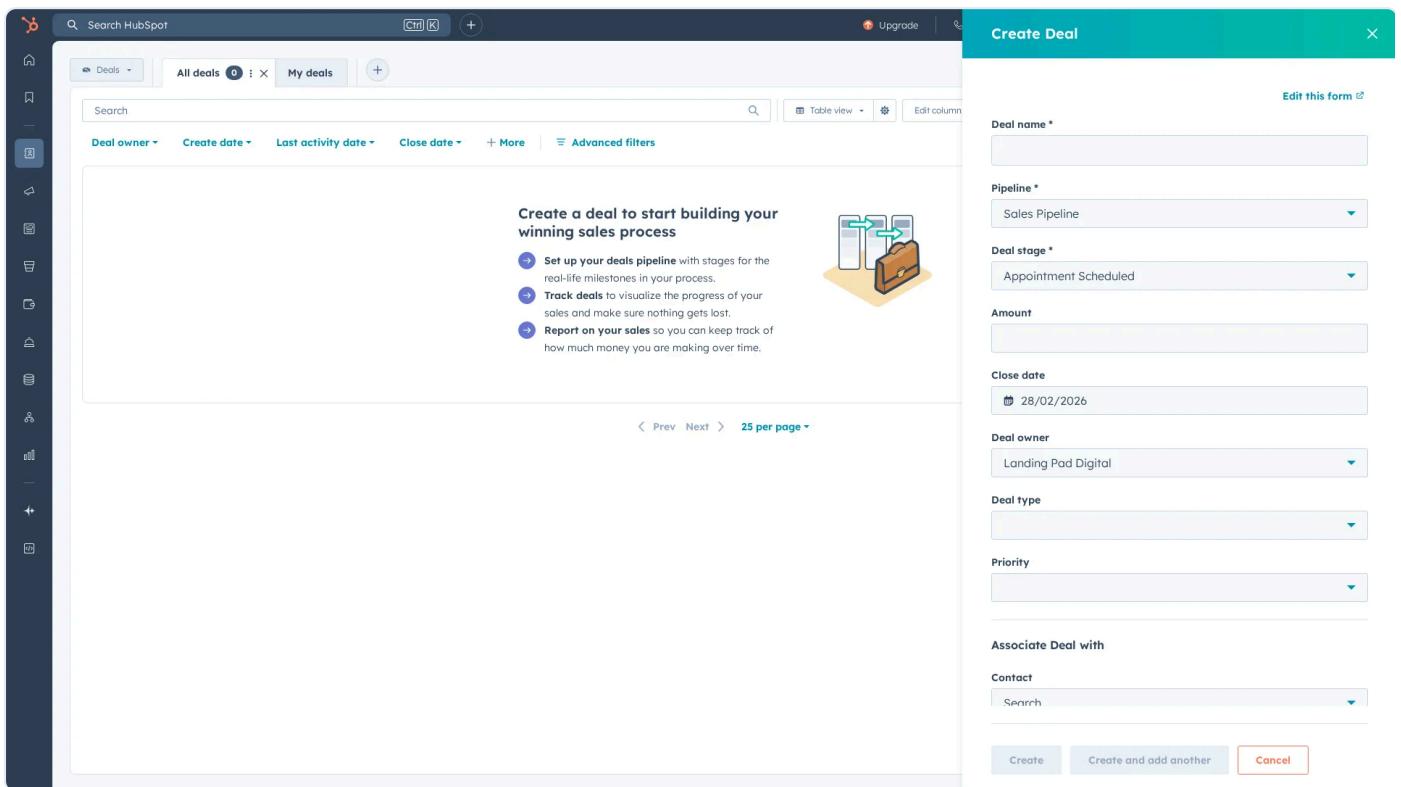
The screenshot shows the same interface after the deal has been created. The 'Create Deal' modal is now blue, indicating it is active. The 'Deal name' field contains '5000'. The 'Create' button is visible at the bottom of the modal. The deals list view on the left shows a new deal has been added, and the search bar is highlighted with a red box.

10 Click 'Create and add another' to save the deal.



The screenshot shows the HubSpot interface. On the left is the 'Deals' list with various filters and a search bar. On the right is the 'Create Deal' modal. The modal contains fields for 'Deal name', 'Pipeline' (set to 'Sales Pipeline'), 'Deal stage' (set to 'Appointment Scheduled'), 'Amount', 'Close date' (set to '28/02/2026'), 'Deal owner' (set to 'Landing Pad Digital'), 'Deal type', 'Priority', and 'Associate Deal with' (a dropdown menu). At the bottom of the modal are three buttons: 'Create', 'Create and add another' (which is highlighted with a red box), and 'Cancel'.

11 Scroll to see more form fields and save options.



This screenshot is similar to the previous one but shows the 'Create Deal' modal partially scrolled down. The visible fields are 'Deal name', 'Pipeline' (set to 'Sales Pipeline'), 'Deal stage' (set to 'Appointment Scheduled'), 'Amount', 'Close date' (set to '28/02/2026'), 'Deal owner' (set to 'Landing Pad Digital'), 'Deal type', 'Priority', and 'Associate Deal with' (a dropdown menu). The bottom buttons are 'Create', 'Create and add another', and 'Cancel'.