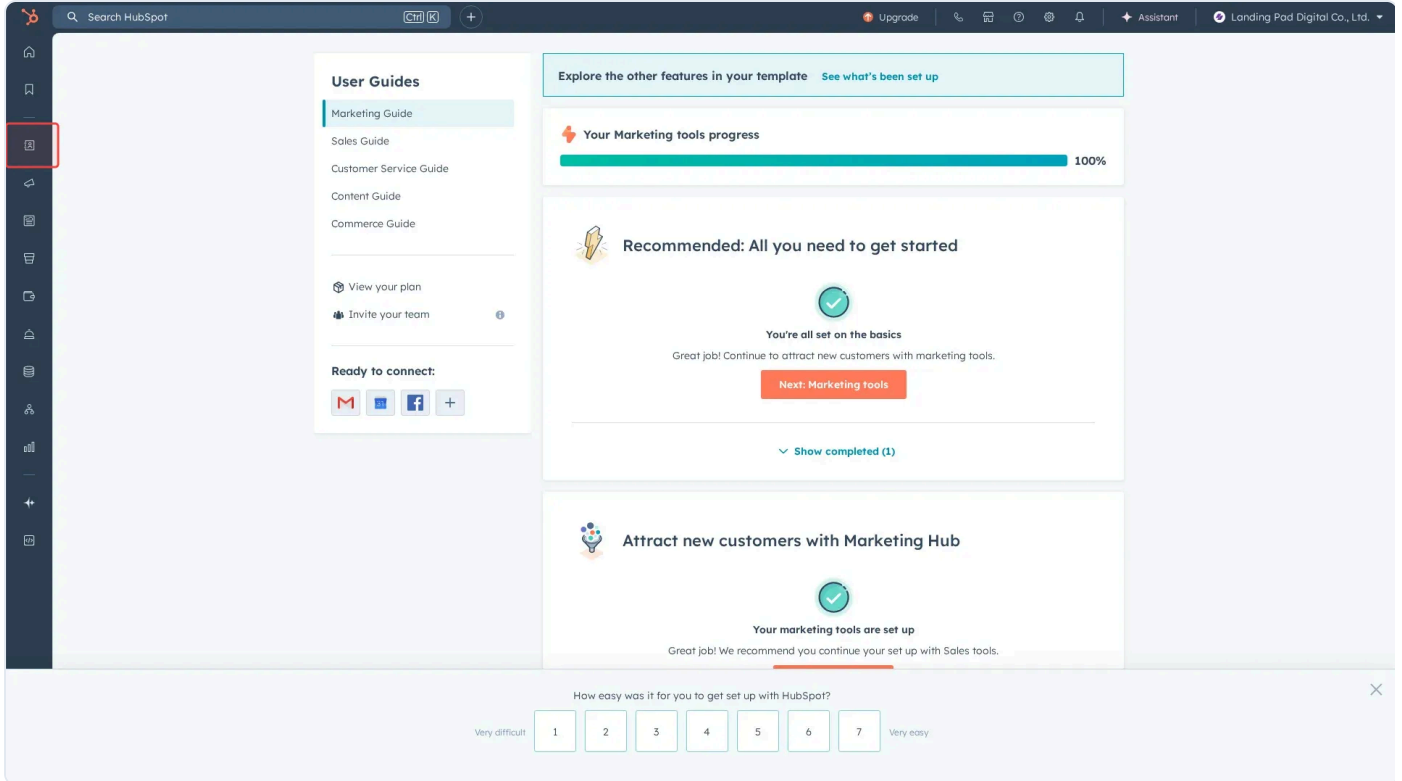


Create a new deal called Website Redesign with amount 5000

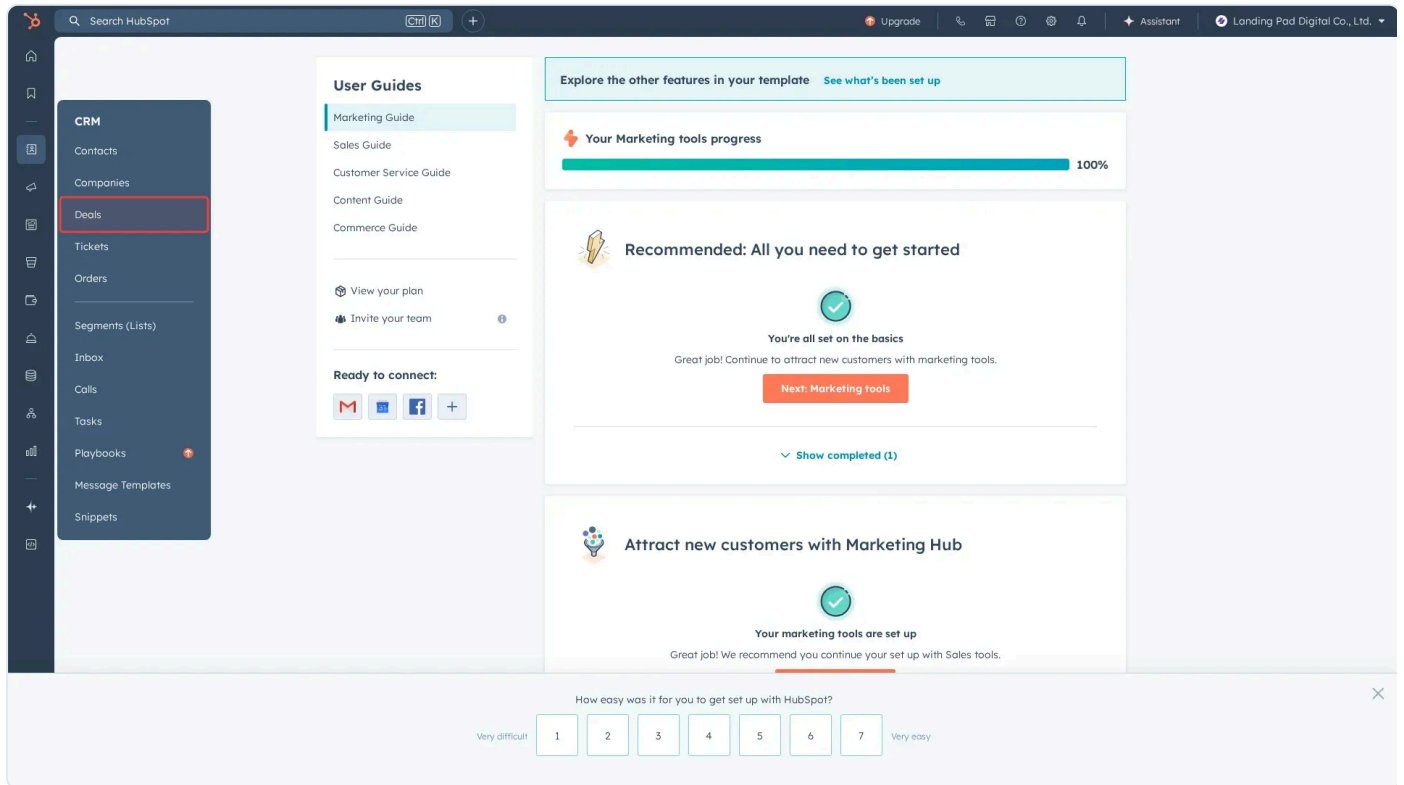
HubSpot 11 steps · 9m 8s

1 Click CRM in left sidebar to expand menu.

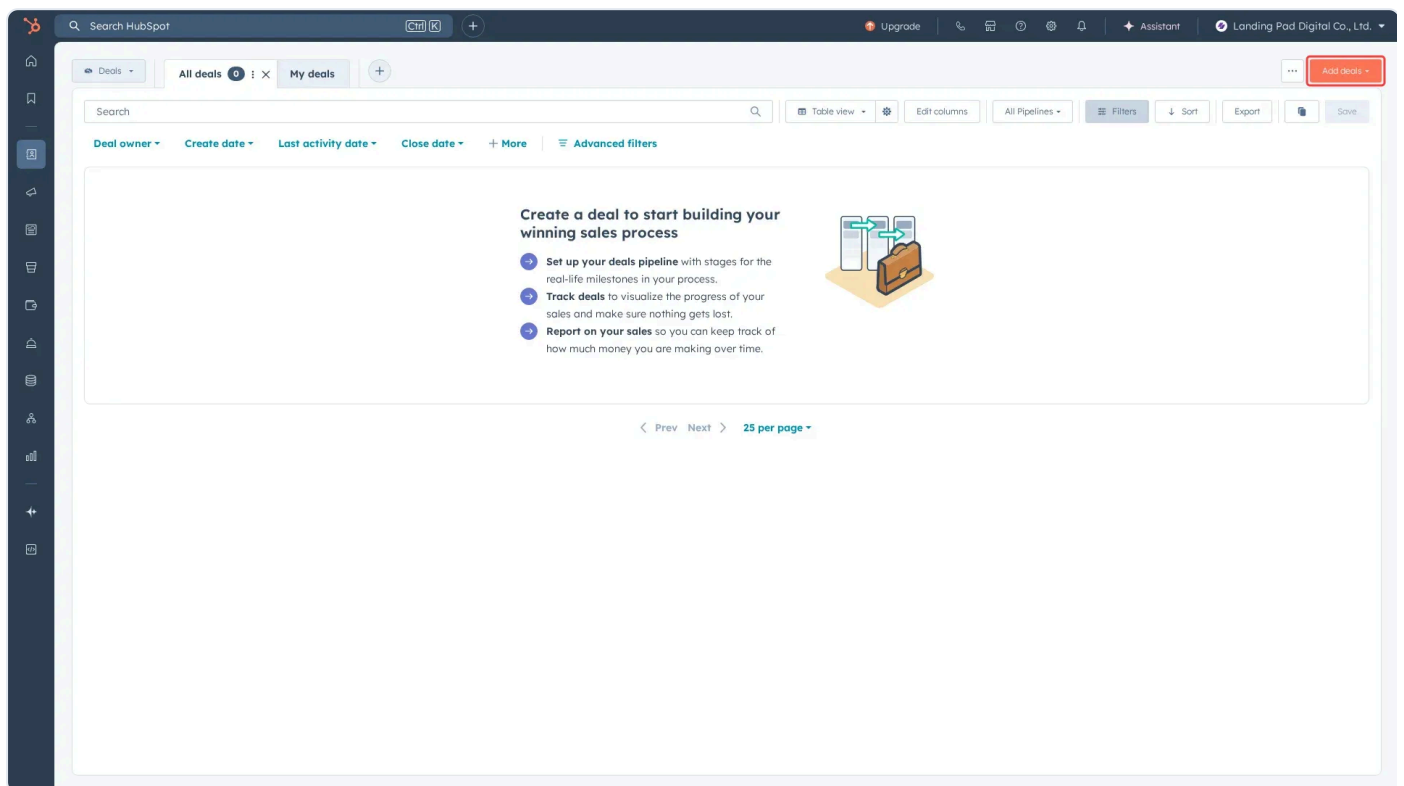


The screenshot displays the HubSpot CRM dashboard. On the left, a dark sidebar contains various navigation icons. The icon representing the CRM (a document with a checkmark) is highlighted with a red rectangular box. The main content area on the right shows a 'User Guides' sidebar with links to Marketing, Sales, Customer Service, Content, and Commerce guides. Below these are links to 'View your plan' and 'Invite your team'. The central area features a 'Your Marketing tools progress' section with a 100% completion bar, a 'Recommended: All you need to get started' section with a green checkmark and a 'Next: Marketing tools' button, and an 'Attract new customers with Marketing Hub' section with another green checkmark. At the bottom, a survey asks 'How easy was it for you to get set up with HubSpot?' with a rating scale from 1 (Very difficult) to 7 (Very easy).

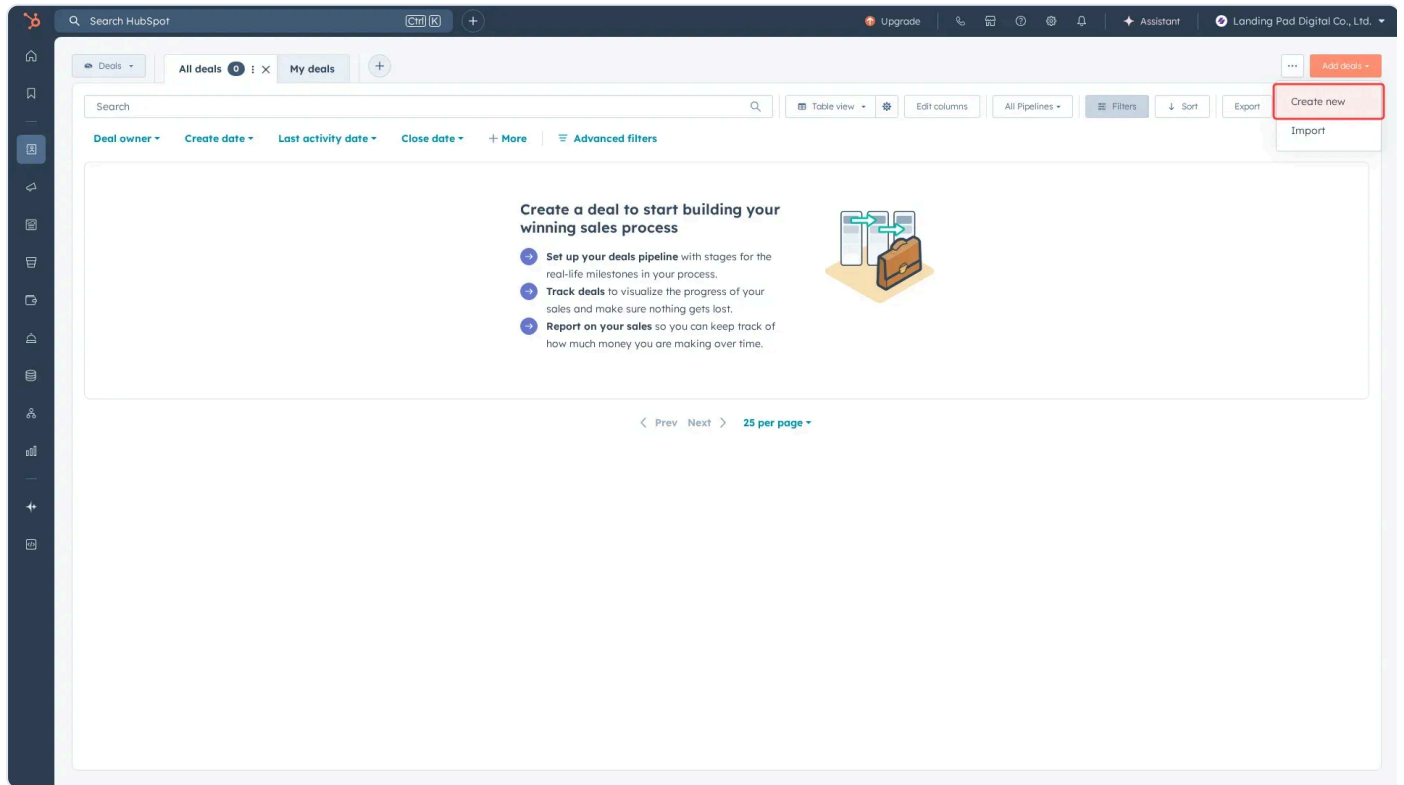
2 Click 'Deals' in CRM submenu to access deals.



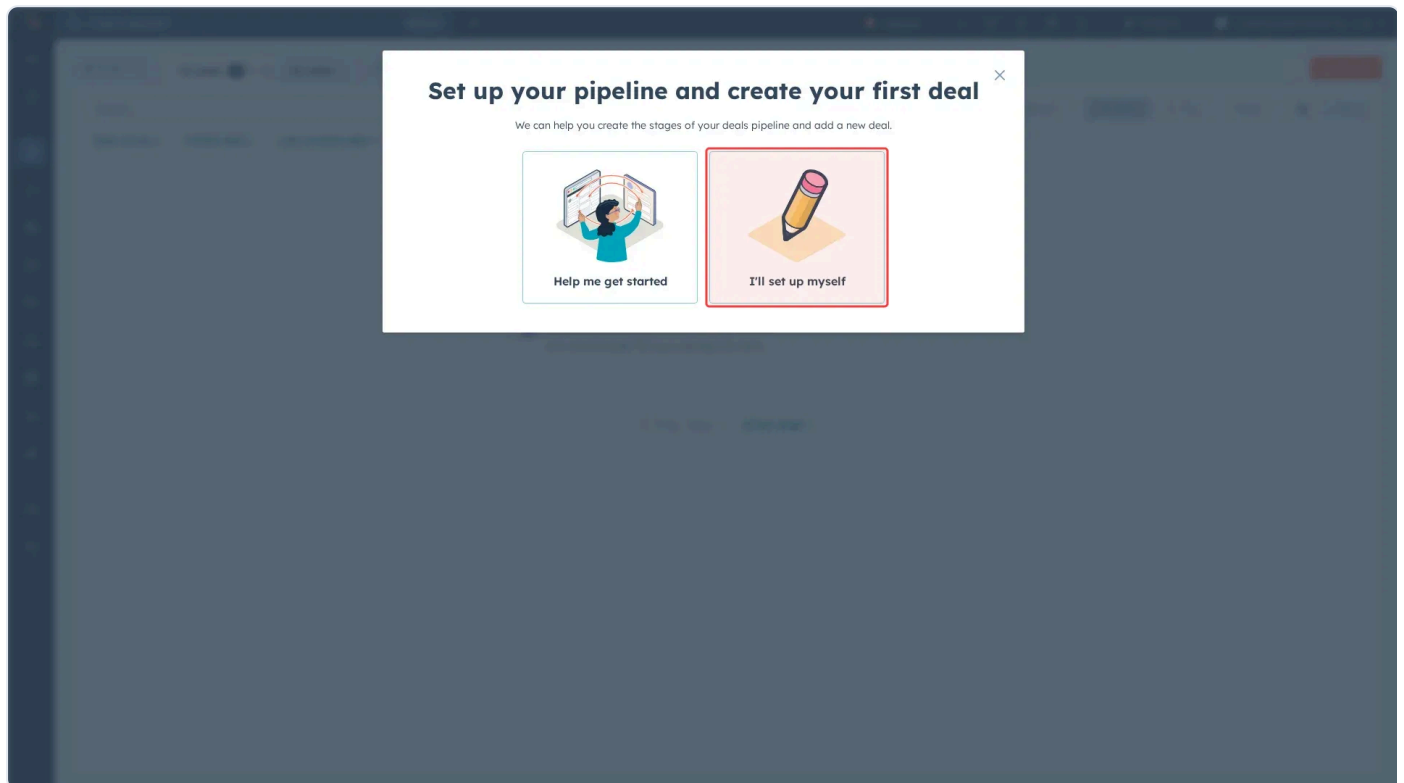
3 Click 'Add deals' button to open deal creation form.



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



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



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

The screenshot shows the HubSpot Deals interface. On the left, the 'Deals' tab is active, and the 'Create date' filter is selected. A red box highlights the 'Deal owner', 'Create date', and 'Last activity date' filters. On the right, the 'Create Deal' form is open. The 'Deal name' field is highlighted with a red box. The form includes fields for Pipeline, Deal stage, Amount, Close date, Deal owner, Deal type, Priority, and Associate Deal with. The 'Deal name' field is currently empty.

7 Scroll to find the Amount field in form.

The screenshot shows the HubSpot Deals interface. On the left, the 'Deals' tab is active, and the 'Create date' filter is selected. A red box highlights the 'Deal owner', 'Create date', and 'Last activity date' filters. On the right, the 'Create Deal' form is open. The 'Amount' field is highlighted with a red box. The form includes fields for Pipeline, Deal stage, Amount, Close date, Deal owner, Deal type, Priority, and Associate Deal with. The 'Amount' field is currently empty.

8 Type '5000' in the Amount field.

The screenshot shows the HubSpot 'Create Deal' form. The 'Amount' field is highlighted with a red rectangular box. The form includes fields for Deal name, Pipeline, Deal stage, Amount, Close date, Deal owner, Deal type, Priority, and Associate Deal with. The 'Amount' field is currently empty.

Create Deal

Deal name *

Pipeline *

Deal stage *

Amount

Close date

Deal owner

Deal type

Priority

Associate Deal with

Contact

Create Create and add another Cancel

9 Click 'Create' button to save the deal.

The screenshot shows the HubSpot 'Create Deal' form. The 'Create' button is highlighted with a red rectangular box. The form includes fields for Deal name, Pipeline, Deal stage, Amount, Close date, Deal owner, Deal type, Priority, and Associate Deal with. The 'Amount' field is currently empty.

Create Deal

Deal name *

Pipeline *

Deal stage *

Amount

Close date

Deal owner

Deal type

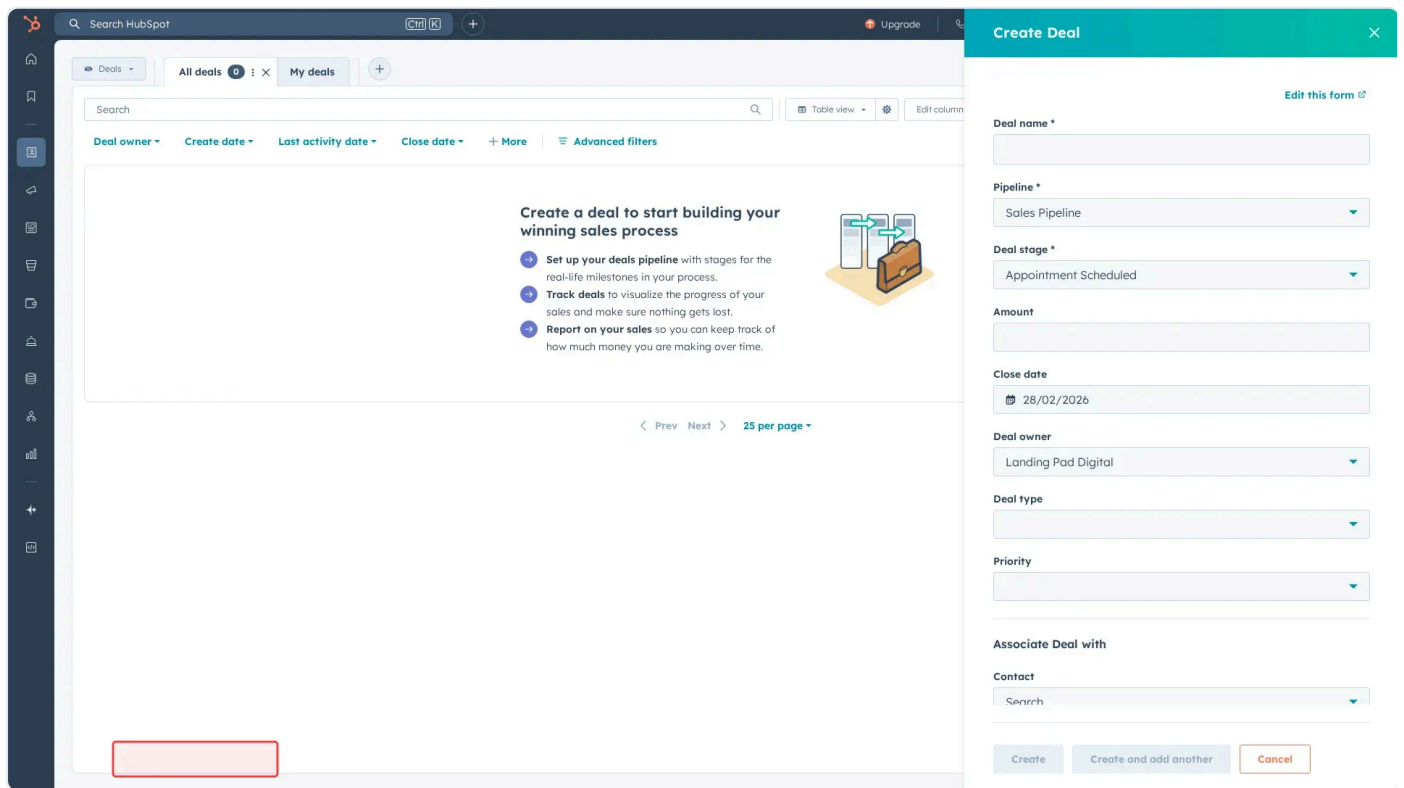
Priority

Associate Deal with

Contact

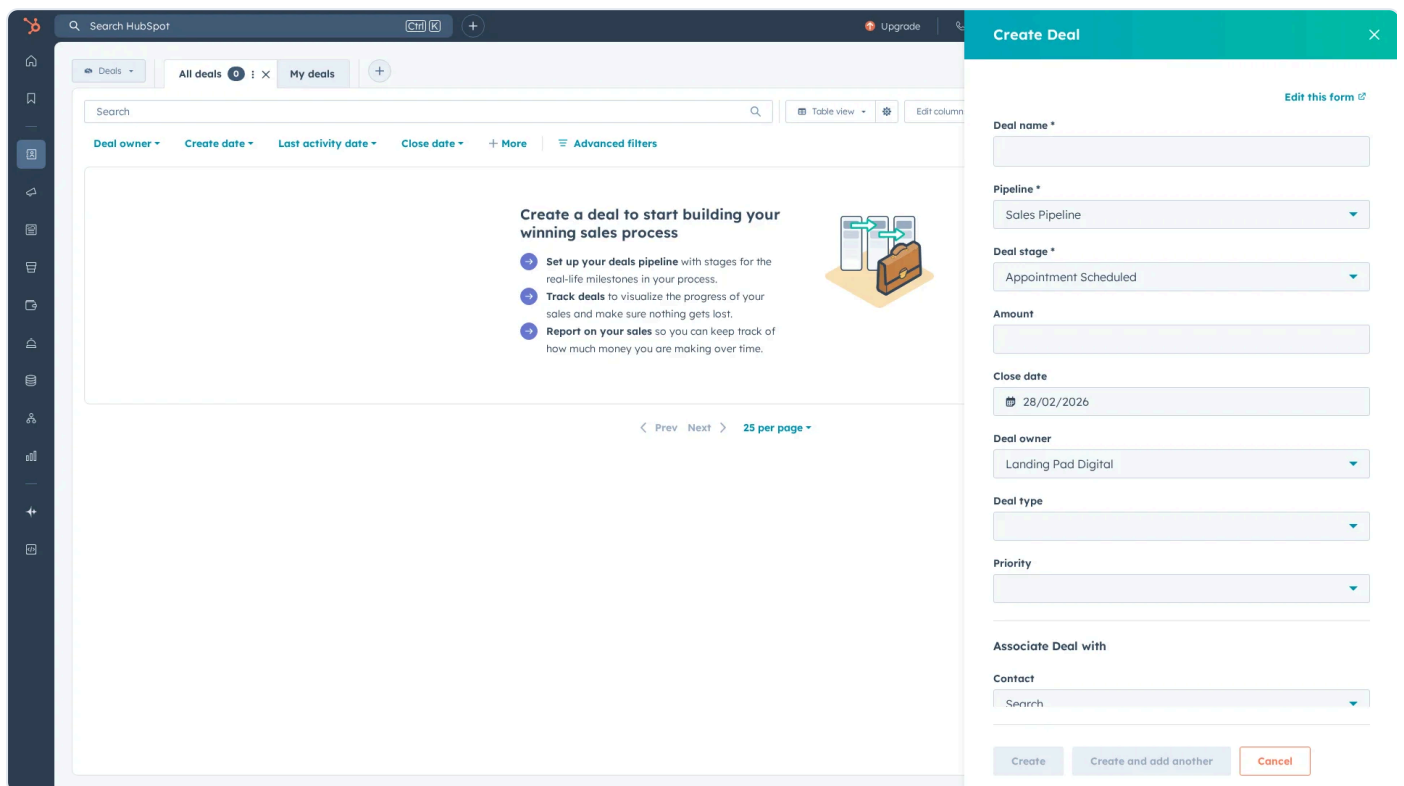
Create Create and add another Cancel

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



The screenshot shows the HubSpot 'Create Deal' form. The form is open on the right side of the screen, showing fields for Deal name, Pipeline, Deal stage, Amount, Close date, Deal owner, Deal type, Priority, and Associate Deal with. The 'Create and add another' button is highlighted with a red box at the bottom right of the form.

11 Scroll to see more form fields and save options.



The screenshot shows the HubSpot 'Create Deal' form, scrolled down to show more fields. The 'Associate Deal with' section is visible, showing a 'Contact' field with a search bar. The 'Create and add another' button is highlighted with a red box at the bottom right of the form.