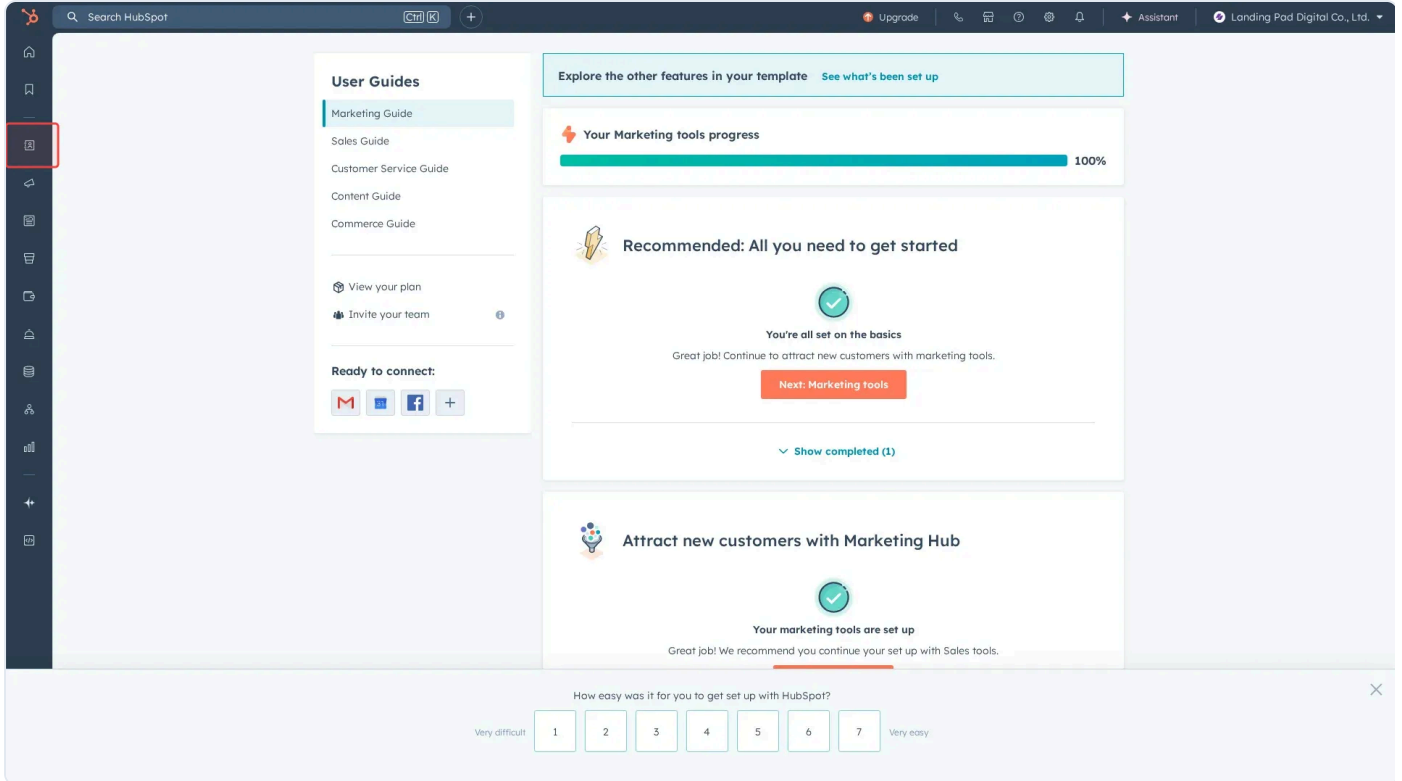


Create a new deal called Website Redesign with amount 5000

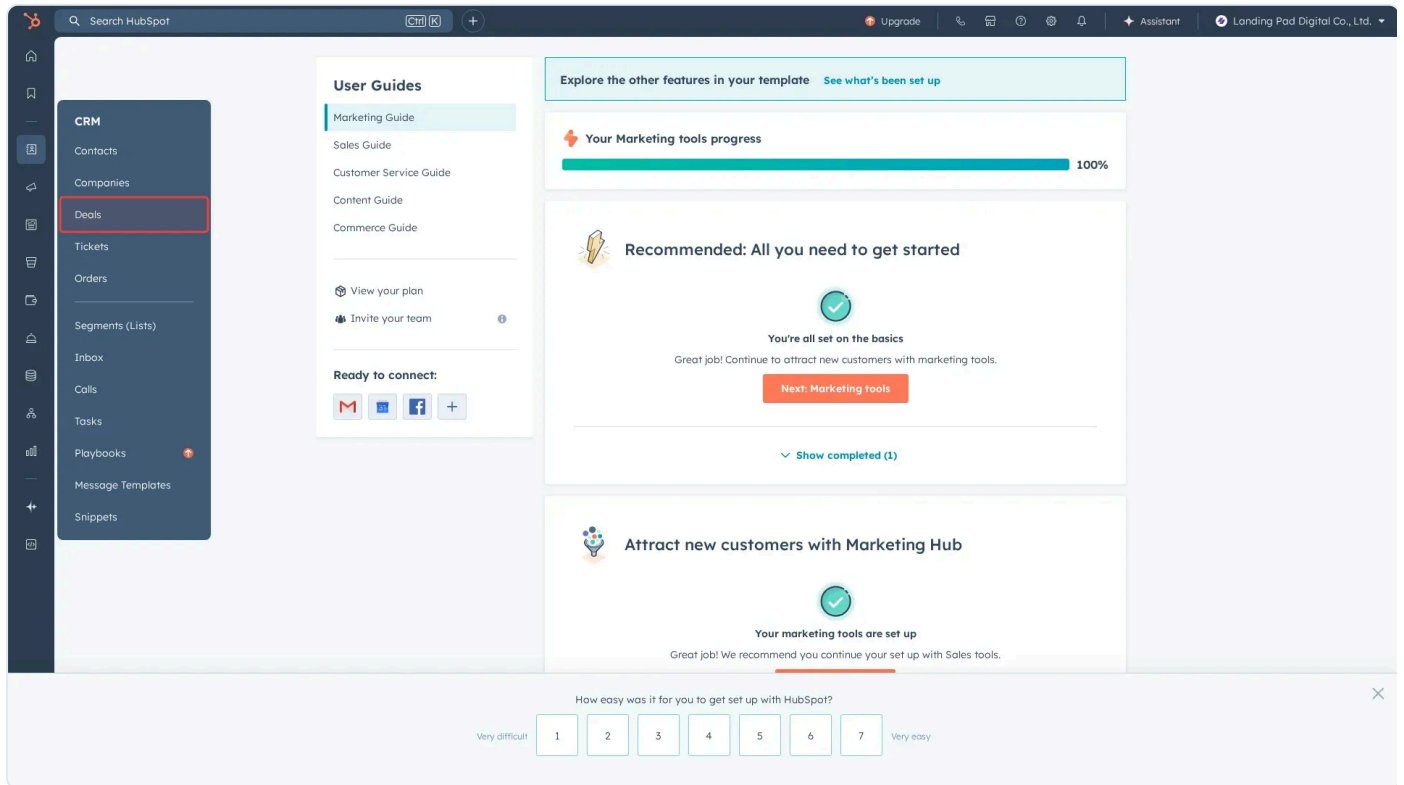
HubSpot 11 steps · 9m 8s

1 Click CRM in left sidebar to expand menu.

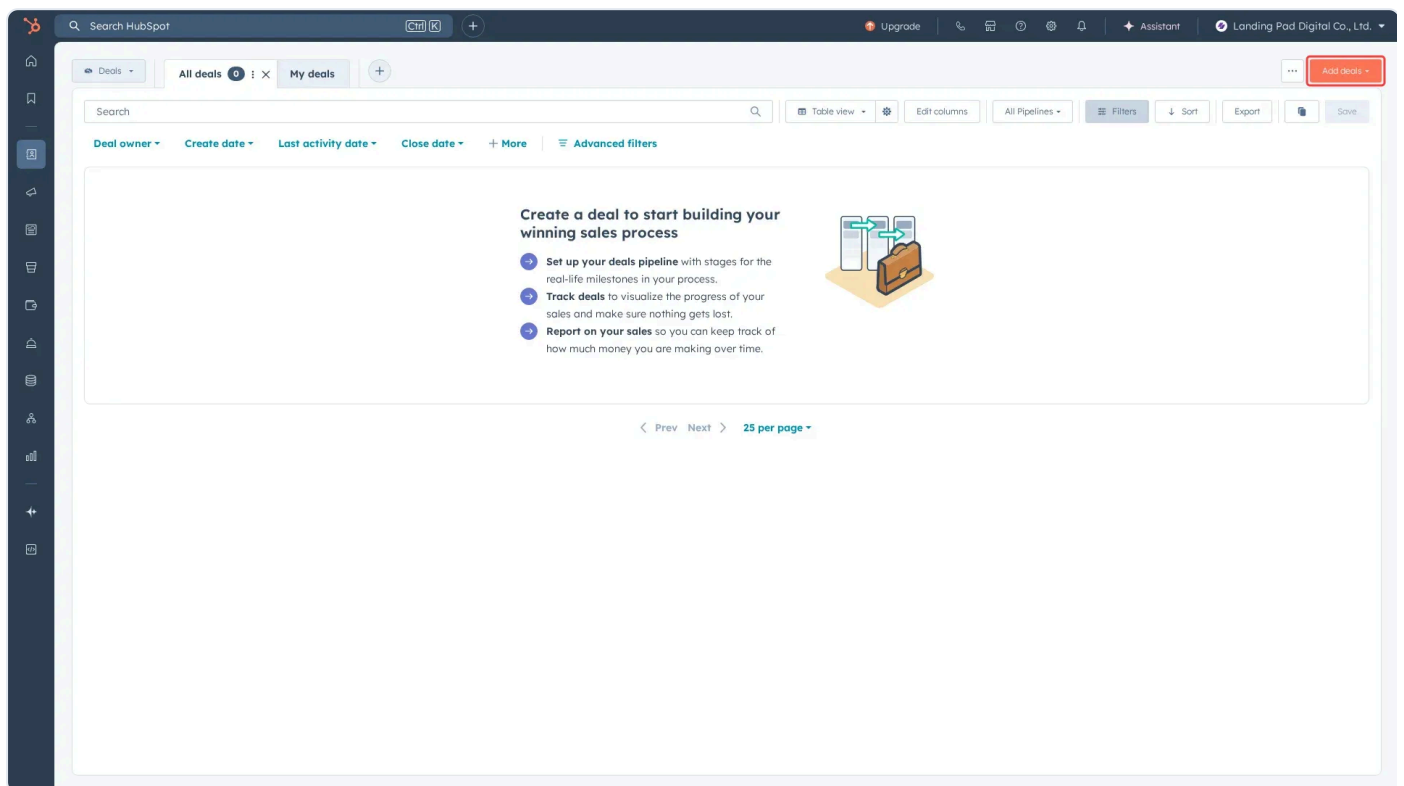


The screenshot displays the HubSpot CRM dashboard. On the left, a dark sidebar contains various navigation icons. The icon representing the CRM (a document with a checkmark) is highlighted with a red rectangular box. The main content area on the right shows a 'User Guides' sidebar with links to Marketing,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

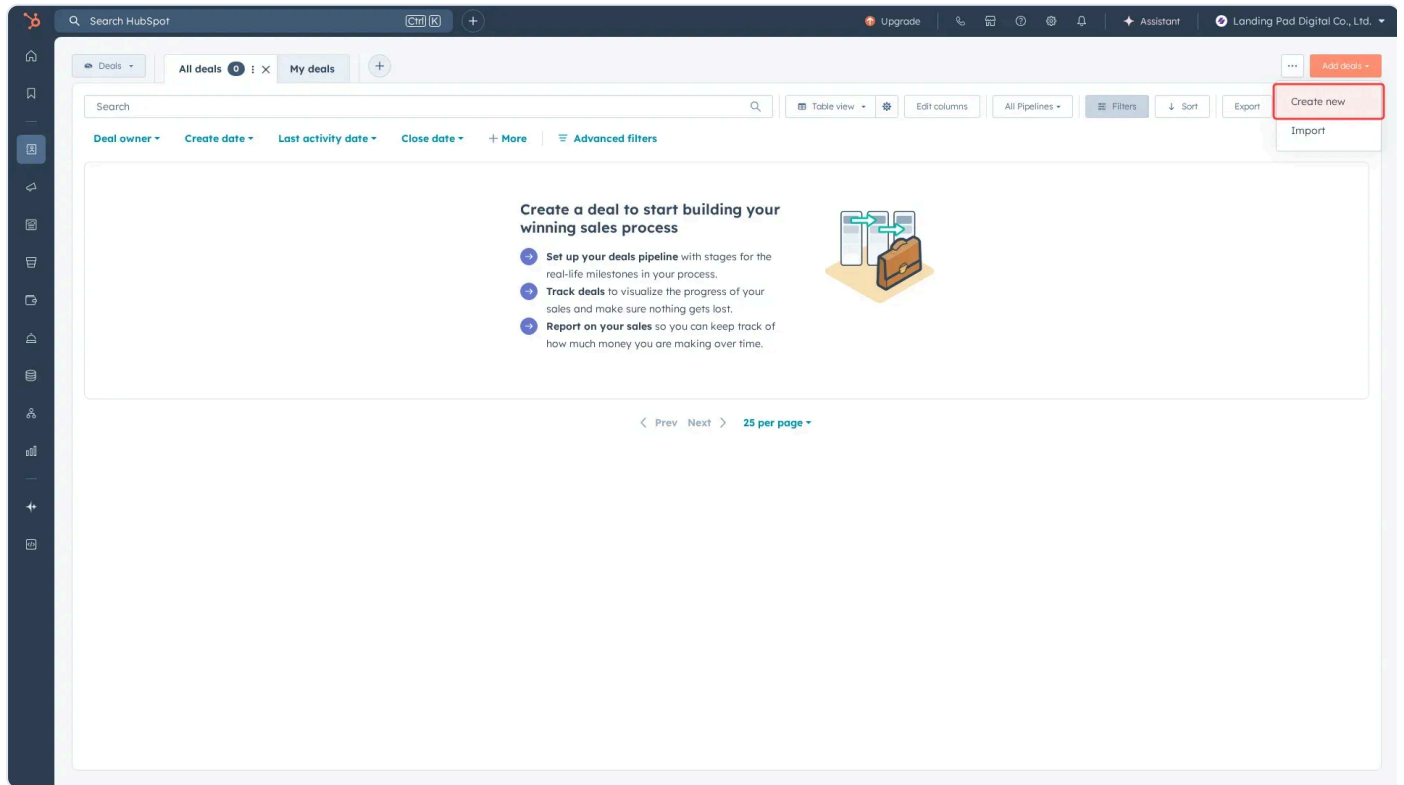
2 Click 'Deals' in CRM submenu to access deals.



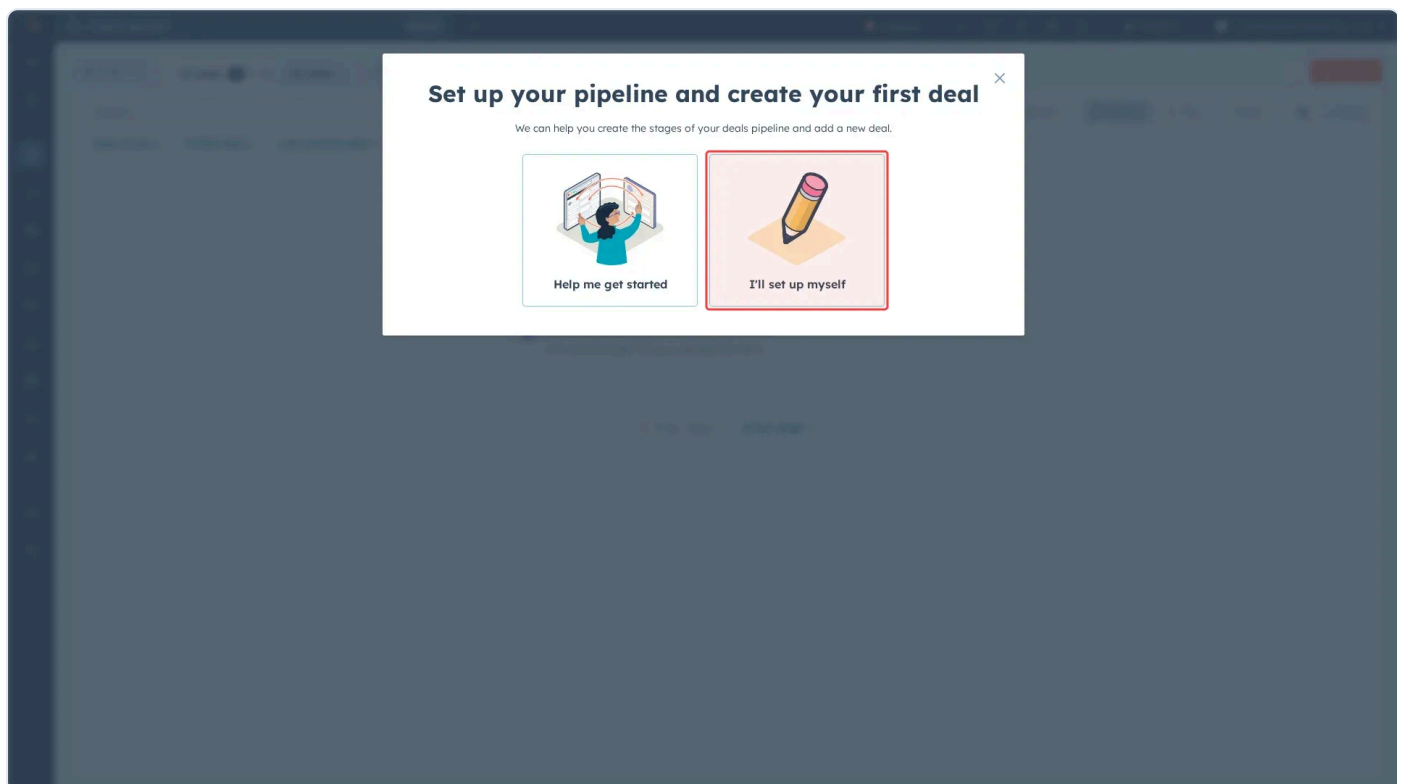
3 Click 'Add deals' button to open deal creation form.



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' sidebar is visible with a red box highlighting the 'Deal owner', 'Create date', 'Last activity date', and 'Close date' filters. The main content area displays a 'Create a deal to start building your winning sales process' guide. On the right, the 'Create Deal' form is open, showing fields for 'Deal name', 'Pipeline', 'Deal stage', 'Amount', 'Close date', 'Deal owner', 'Deal type', 'Priority', and 'Associate Deal with'. The 'Deal name' field is highlighted with a red box.

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

7 Scroll to find the Amount field in form.

The screenshot shows the HubSpot Deals interface. On the left, the 'Deals' sidebar is visible with a red box highlighting the 'Deal owner', 'Create date', 'Last activity date', and 'Close date' filters. The main content area displays a 'Create a deal to start building your winning sales process' guide. On the right, the 'Create Deal' form is open, showing fields for 'Deal name', 'Pipeline', 'Deal stage', 'Amount', 'Close date', 'Deal owner', 'Deal type', 'Priority', and 'Associate Deal with'. The 'Amount' field is highlighted with a red box.

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

8 Type '5000' in the Amount field.

The screenshot shows the HubSpot 'Create Deal' form. The 'Amount' field is highlighted with a red 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 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.

Search HubSpot

Deals

All deals 0 My deals

Search

Table view Edit column

Deal owner Create date Last activity date Close date + More Advanced filters

Create a deal to start building your winning sales process

- 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.
- Report on your sales so you can keep track of how much money you are making over time.

Prev Next 25 per page

Create Deal

Edit this form

Deal name *

Pipeline *
Sales Pipeline

Deal stage *
Appointment Scheduled

Amount

Close date
28/02/2026

Deal owner
Landing Pad Digital

Deal type

Priority

Associate Deal with

Contact
Search

Create Create and add another Cancel

11 Scroll to see more form fields and save options.

Search HubSpot

Deals

All deals 0 My deals

Search

Table view Edit column

Deal owner Create date Last activity date Close date + More Advanced filters

Create a deal to start building your winning sales process

- 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.
- Report on your sales so you can keep track of how much money you are making over time.

Prev Next 25 per page

Create Deal

Edit this form

Deal name *

Pipeline *
Sales Pipeline

Deal stage *
Appointment Scheduled

Amount

Close date
28/02/2026

Deal owner
Landing Pad Digital

Deal type

Priority

Associate Deal with

Contact
Search

Create Create and add another Cancel