Blogs -

Knowledge Base > CRM > Deals > Create deals

Create deals

Last updated: June 28, 2023

Available with any of the following subscriptions, except where noted: All products and plans

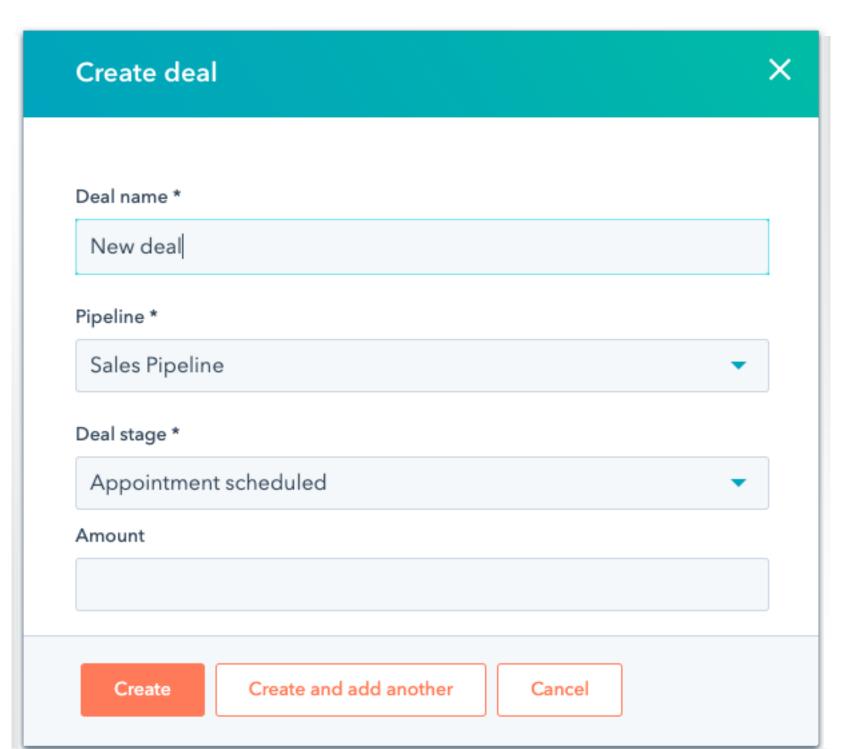
Use deals in HubSpot to track potential revenue through your sales process. You can associate deals with other records, such as contacts and companies involved in the deal. Once records are associated to a deal, HubSpot can associate the relevant activities to the deal record.

To customize how deals are created, learn how to set the properties that appear when users create deals, or how to set a default close date for newly created deals.

Create a deal from your deals index page

To manually create a deal:

- In your HubSpot account, navigate to **Sales** > **Deals**.
- In the upper right, click Create deal.
- In the right panel, enter the details of the deal.

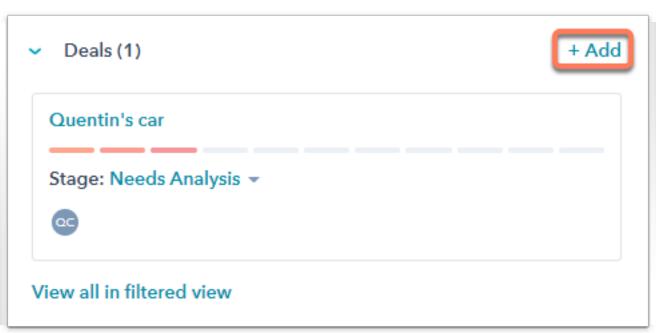


- In the Associate deal with section, search for and select records or line items the deal is related to.
- Click Create deal. If you want to create another deal, click Create and add another.

Create a deal on a record

To create a deal from a record you want associated with the deal:

• In the right panel of the record, in the *Deals* section, click + Add.



- Enter the **details** for your new deal in the *Associate new* tab. By default, the deal will be associated to the record.
- Once you're done, click Create, or Create and add another to add an additional new deal.

Learn more about associated timeline activities between records. If you want to add existing deals to a record, learn how to associate records.

Create a deal from your Gmail or Outlook inbox

Once you've installed the HubSpot Sales Chrome extension, the Office 365 add-in, or the Outlook desktop add-in, you can create deals for your contacts from within your inbox. Learn how to create deals using contact profiles in Gmail, or contact profiles in Office 365 and Outlook on desktop.

Create a deal using a workflow

Depending on your account's HubSpot subscription, you can use the *Create a deal* action in the workflows tool to automatically trigger a deal creation when a record meets certain conditions. For example, if a contact meets a certain value in a score property, a deal could automatically be created and assigned to your sales team. Learn how to create deals via workflow.

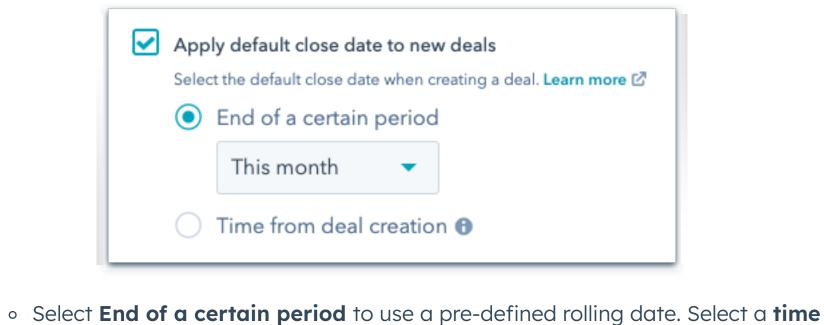
Set a default close date for new deals

By default, a deal's close date is set to the last day of the month it was created, but you can set a default close date for newly created deals.

Please note: default close date settings do <u>not</u> apply to deals created in the mobile app, via import, or through a workflow. For workflows, you can set a default close date when using the Create record workflow action, but if no date is set, the close date will be blank upon creation of a deal.

To set a default close date for newly created deals in the desktop app:

- In your HubSpot account, click the 🛱 settings icon in the main navigation bar.
- In the left sidebar menu, select **Objects**, then **Deals**. • The Apply default close date to new deals checkbox is selected by default. To edit the
- close date:



- **frame** from the dropdown menu, either *This month* or *Next month*.
- deal was created. Enter a **number** and select a **time frame** from the dropdown menu.

Select Time from deal creation to use a custom rolling date based on when the

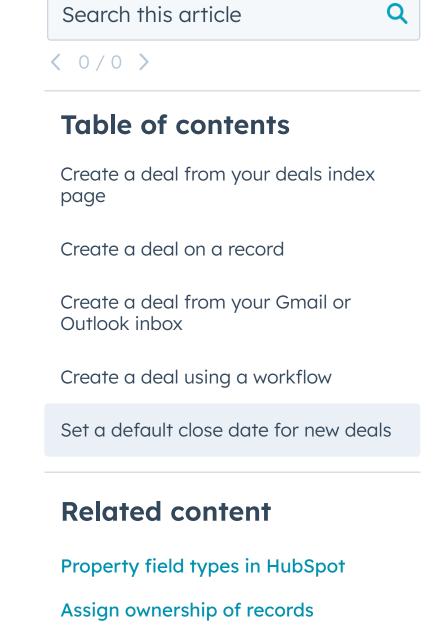
• To skip including a close date, clear the **Apply default close date to new** deals checkbox. With the setting turned off, newly created deals will have no close date by default.

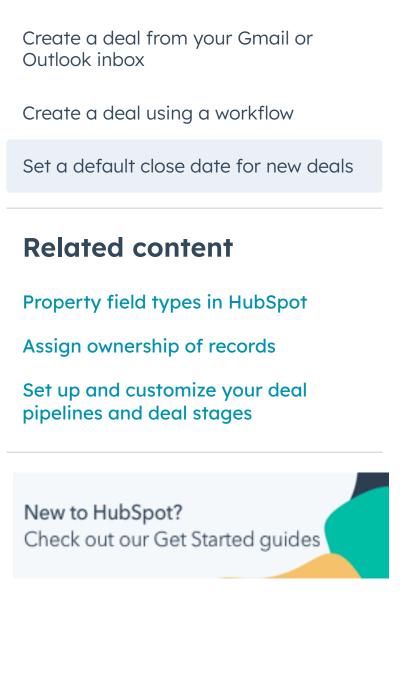
A deal's close date is also automatically set or updated by HubSpot when:

- A user creates an open deal and does not manually select a close date. • A user moves a deal into a closed-won or a closed-lost deal stage. This includes moving
- a deal that was already in a closed-won deal stage to a closed-lost deal stage, or from a closed-lost deal stage to a closed-won deal stage.

Learn more about HubSpot's default deal properties. Was this article helpful?

Yes No





Copyright © 2023 HubSpot, Inc.