


Create deals

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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.

Create deal

Deal name *

New deal

Pipeline *

Sales Pipeline

Deal stage *

Appointment scheduled

Amount

Create

Create and add another

Cancel

- 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**.

Deals (1)

+ Add

Quentin's car

Stage: Needs Analysis

View all in filtered view

- 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 not 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:

☒ Apply default close date to new deals

Select the default close date when creating a deal. [Learn more](#)

☒ End of a certain period

This month

☐ Time from deal creation

- Select **End of a certain period** to use a pre-defined rolling date. Select a **time frame** from the dropdown menu, either *This month* or *Next month*.
- Select **Time from deal creation** to use a custom rolling date based on when the deal was created. Enter a **number** and select a **time frame** from the dropdown menu.
- 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](#).

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