

Creating a Deal in HubSpot



Log into HubSpot account

User accesses their HubSpot account

User moves to the Deals section

Navigate to Sales > Deals



Click on Create deal

User initiates the deal creation process

User inputs a clear title for the deal

Enter Deal Name



Select Pipeline

User chooses the appropriate sales pipeline

User selects the current stage of the deal

Select Deal Stage



Enter Amount

User estimates the deal's value

User sets the expected closing date

Enter Close Date



Assign Deal Owner

User assigns a salesperson to manage the deal

Venmo Deal Tutorial

Emilie Sanchez

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Venmo Deal Tutorial:

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