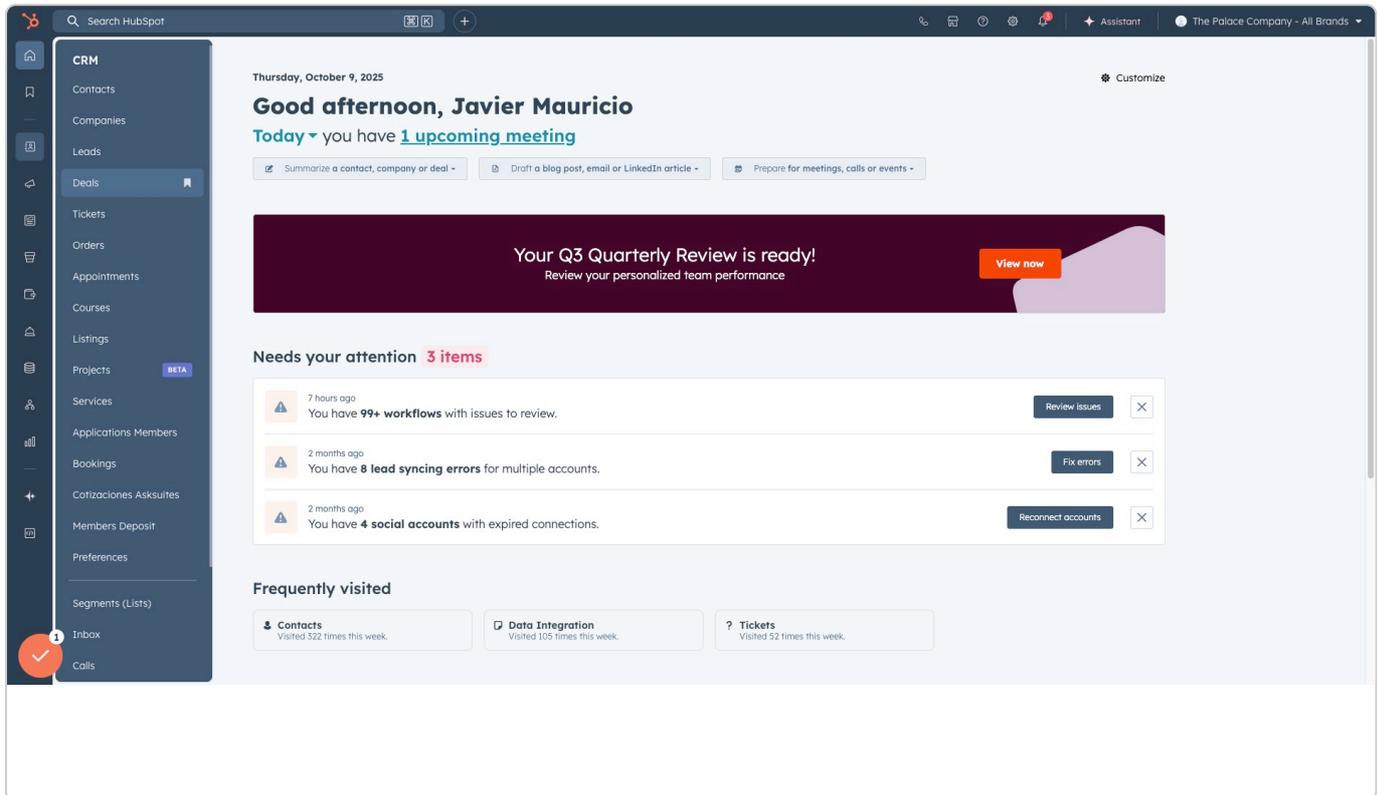


How to create a Deal

Última actualización: 9 de oct. de 2025

1 Navigate to Global Home | HubSpot

2 Click on Deals



3

Click on Add deals

The screenshot shows the HubSpot Deals interface. At the top right, there is a red button labeled "Add deals". A red circle with the number "2" and a checkmark is positioned over this button. The main content area displays a table with one deal entry:

DEAL NAME	DEAL OWNER	PIPELINE	OWNER ASSIGNED DATE	ARRIVAL	DEPARTURE	DEAL -- CONTACT
Here goes the Deal Name	JP Javier Mauricio Avina P...	Call Center Baglioni	Today at 3:29 PM CST (30 mi...	Tomorrow	Oct 11, 2025	--

Below the table, there are navigation controls: "< Prev 1 Next >" and "25 per page".

4

Click on highlighted area

The screenshot shows the HubSpot Deals interface, similar to the previous one. In the top right corner, a dropdown menu is open, showing two options: "Create new" and "Import". A red circle with the number "3" and a checkmark is positioned over the "Create new" option. The rest of the interface, including the table and navigation controls, is identical to the previous screenshot.

5

Click on Deal name

Insert the deal name

The screenshot shows the HubSpot CRM interface with the 'Create Deal' form open on the right. The 'Deal name' field is empty and highlighted with a red circle and a checkmark. The table below shows a single deal with the name 'Here goes the Deal Name'.

DEAL NAME	DEAL OWNER	PIPELINE	OWNER ASSIGNED DATE...	ARRIVAL
Here goes the Deal Name	JR Javier Mauricio Avina P...	Call Center Baglioni	Today at 3:29 PM CST (30 mi...	Tomorr...

6

Click on highlighted area

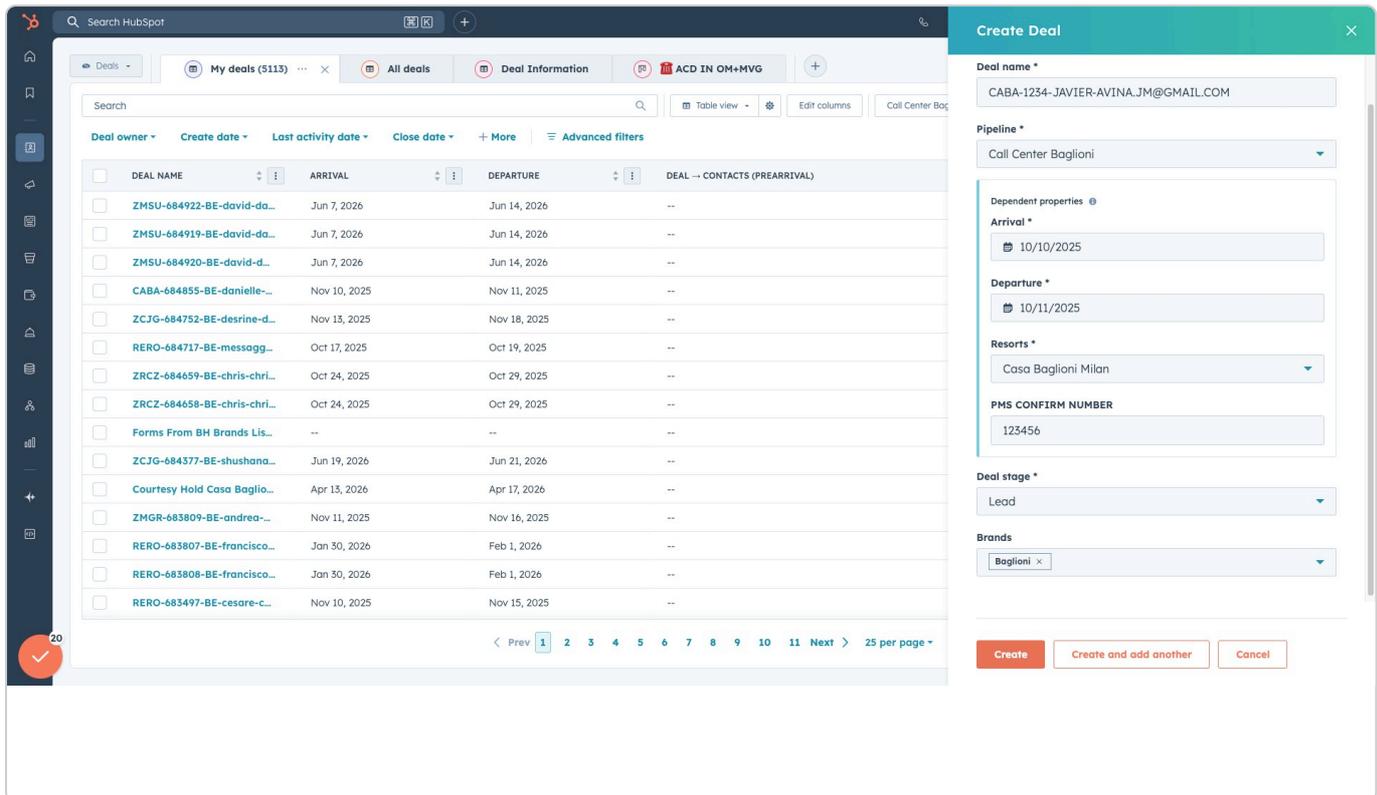
The screenshot shows the HubSpot CRM interface with the 'Create Deal' form open on the right. The 'Deal name' field is filled with 'CABA-1234-JAVIER-AVINA.JM@GMAIL.COM'. The table below shows a list of deals, with the first row highlighted in blue.

DEAL NAME	ARRIVAL	DEPARTURE	DEAL → CONTACTS (PREARRIVAL)
ZMSU-684922-BE-david-da...	Jun 7, 2026	Jun 14, 2026	--
ZMSU-684919-BE-david-da...	Jun 7, 2026	Jun 14, 2026	--
ZMSU-684920-BE-david-d...	Jun 7, 2026	Jun 14, 2026	--
CABA-684855-BE-danielle...	Nov 10, 2025	Nov 11, 2025	--
ZCJG-684752-BE-desrine-d...	Nov 13, 2025	Nov 18, 2025	--
RERO-684717-BE-messagg...	Oct 17, 2025	Oct 19, 2025	--
ZRCZ-684659-BE-chris-chri...	Oct 24, 2025	Oct 29, 2025	--
ZRCZ-684658-BE-chris-chri...	Oct 24, 2025	Oct 29, 2025	--
Forms From BH Brands Lis...	--	--	--
ZCJG-684377-BE-shushana...	Jun 19, 2026	Jun 21, 2026	--
Courtesy Hold Casa Baglio...	Apr 13, 2026	Apr 17, 2026	--
ZMGR-683809-BE-andrea...	Nov 11, 2025	Nov 16, 2025	--
RERO-683807-BE-francisco...	Jan 30, 2026	Feb 1, 2026	--
RERO-683808-BE-francisco...	Jan 30, 2026	Feb 1, 2026	--
RERO-683497-BE-cesare-c...	Nov 10, 2025	Nov 15, 2025	--

7

Click on Create

After you finish to insert all the informations in the mandatory fields (*) you will be able to create the Deal

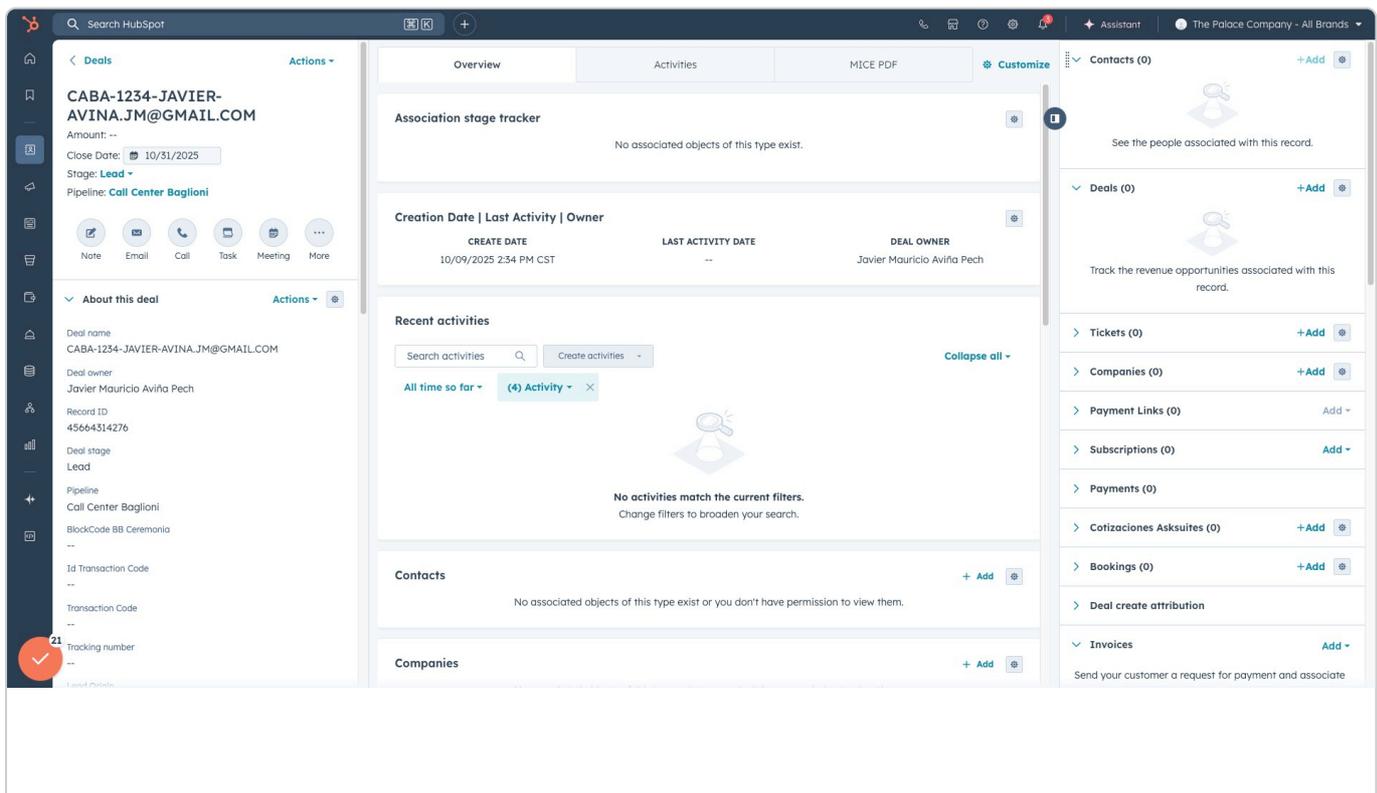


The screenshot displays the HubSpot interface. On the left, a table lists various deals with columns for DEAL NAME, ARRIVAL, DEPARTURE, and DEAL -- CONTACTS (PREARRIVAL). On the right, the 'Create Deal' form is open, showing fields for Deal name, Pipeline, Dependent properties, Arrival, Departure, Resorts, PMS CONFIRM NUMBER, Deal stage, and Brands. The 'Create' button is visible at the bottom of the form.

8

How to associate a Contact

There are two different ways to associate a contact to a deal. 1.- Use an existing one or 2.- Create a new contact



The screenshot shows the detailed view of a deal record for 'CABA-1234-JAVIER-AVINA.JM@GMAIL.COM'. The record includes fields for Amount, Close Date, Stage, Pipeline, and Deal owner. The 'Recent activities' section shows a search bar and a 'Create activities' button. The 'Contacts' section indicates that no associated objects of this type exist. The right sidebar shows a list of associated objects, including Deals, Tickets, Companies, Payment Links, Subscriptions, Payments, Cotizaciones Asksuites, Bookings, Deal create attribution, and Invoices.

9 Add existing contact

Type the email of the contact that you want to associate

The screenshot shows the HubSpot interface with the 'Add existing Contact' dialog box open. The dialog box has a search field containing 'avina.jm98'. Below the search field, it shows '1 Contact' with a dropdown menu set to 'Default (Recently added)'. The contact list includes 'Javier Test Aviña Test (avina.jm98@gmail.com)'. At the bottom right of the dialog box, it says 'Step 1 of 2' and has a 'Next >' button.

10 Check existing contact

The screenshot shows the HubSpot interface with the 'Add existing Contact' dialog box open. The search field contains 'avina.jm98'. Below the search field, it shows '1 selected' and '1 Contact' with a dropdown menu set to 'Default (Recently added)'. The contact list includes 'Javier Test Aviña Test (avina.jm98@gmail.com)' with a checked checkbox. At the bottom right of the dialog box, it says 'Step 1 of 2' and has a 'Next >' button.

11 Click on Save

The screenshot shows the HubSpot CRM interface for a deal named "CABA-1234-JAVIER-AVINA.JM@GMAIL.COM". The deal is in the "Lead" stage, managed by "Call Center Baglioni". The main content area is divided into sections: "Association stage tracker" (no associated objects), "Creation Date | Last Activity | Owner" table, "Recent activities" (4 activities, no filters match), "Contacts" (no associated objects), and "Companies" (no associated objects). A modal titled "Add existing Contact" is open on the right, showing "Create new" and "Add existing" buttons, a search bar, and a list of 1,276 contacts. The modal is on "Step 2 of 2" with a "Save" button.

CREATE DATE	LAST ACTIVITY DATE	DEAL OWNER
10/09/2025 2:34 PM CST	--	Javier Mauricio Avila

NAME	EMAIL	PHONE NUMBER
JT Javier Test Avina Test	avina.jm98@gmail.com	--

12 Click on Create a new one

The screenshot shows the HubSpot CRM interface for the same deal as in step 11. The modal "Add existing Contact" is open, showing a search bar and a list of 1,276 contacts. The modal is on "Step 1 of 2" with a "Next" button. The deal record and other interface elements are the same as in step 11.

NAME	EMAIL	PHONE NUMBER
JT Javier Test Avina Test	avina.jm98@gmail.com	--

13 Fill out all the fields

The fields with (*) are mandatory

The screenshot shows the HubSpot CRM interface with a 'Create Contact' modal open. The modal contains the following fields:

- Create new** (button) / **Add existing** (button) / **Edit this form** (link)
- Email**: javina@test.com
- First name ***: (empty field)
- Last name ***: (empty field)
- Phone number**: (empty field)
- Language selection**: (dropdown menu)
- WhatsApp Phone Number**: (empty field)
- Contact Type**: (dropdown menu)
- Legal basis for processing contact's data ***: (dropdown menu)

Buttons at the bottom: **Create**, **Create and add another**, **Cancel**.

14 Click on legal basis for processing contact data

This check box is very important because this will allow you to interact with the contact later.

The screenshot shows the HubSpot CRM interface with the 'Create Contact' modal open. The 'Legal basis for processing contact's data' dropdown menu is expanded, showing the following options:

- Legitimate interest - prospect/lead
- Legitimate interest - existing customer
- Legitimate interest - Other
- Performance of a contract
- Freely given consent from contact
- Not applicable

Buttons at the bottom: **Create**, **Create and add another**, **Cancel**.

15

Check option

Choose the option that applies for your contact

The screenshot shows the HubSpot 'Create Contact' form. The form is partially filled with the following information:

- Name:** javier
- Last name:** aviña
- Phone number:** +1
- Language selection:** (dropdown menu)
- WhatsApp Phone Number:** (empty field)
- Contact Type:** (dropdown menu)
- Legal basis for processing contact's data:** A dropdown menu is open, showing the following options:
 - Legitimate interest - prospect/lead
 - Legitimate interest - existing customer
 - Legitimate interest - Other
 - Performance of a contract
 - Freely given consent from contact
 - Not applicable

The background shows the 'Deals' view for 'CABA-1234-JAVIER-AVINA.JM@GMAIL.COM' with details like 'Amount: --', 'Close Date: 10/31/2025', and 'Stage: Lead'. The 'Recent activities' section shows '(4) Activity'.

16

Click on Save

After filling all the fields you will be able to make click on "Create"

The screenshot shows the HubSpot 'Create Contact' form, now fully filled out. The 'Legal basis for processing contact's data' dropdown is closed, and the 'Create' button is highlighted in red. The form contains the following information:

- Name:** javier
- Last name:** aviña
- Phone number:** +52-98-11-382666
- Language selection:** (dropdown menu)
- WhatsApp Phone Number:** (empty field)
- Contact Type:** (dropdown menu)
- Legal basis for processing contact's data:** Legitimate interest - prospect/lead

The background shows the same 'Deals' view as in the previous screenshot. The 'Create' button is now visible at the bottom of the form.