

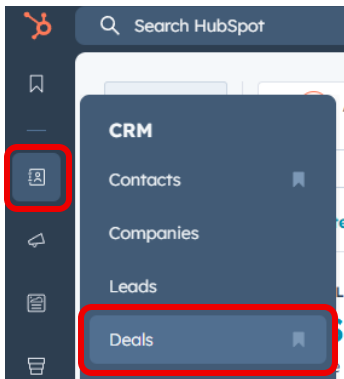
HubSpot CRM – Deals

When to Create a Deal?

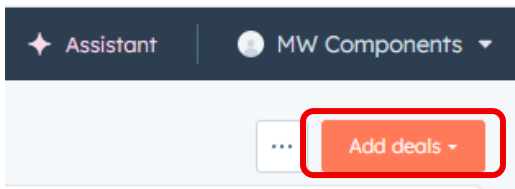
- When there is an opportunity for a New Logo
- When the opportunity is > \$10K
- When there is commission potential
 - New Part or Part has not been sold in the last 2 years
 - Must be >\$3K
 - Must be shipped to receive credit
 - Deal must be associated to an ERP Order

How to Create a Deal

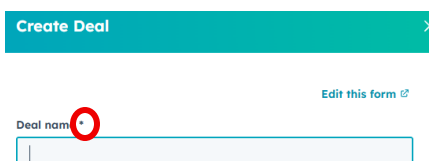
1. In the navigation bar on the left side, click the **CRM** tab and select **Deals**



2. In the upper right corner of the Deals page, select **"Add Deals"** and choose **"Create New"**



3. In the right panel that will appear enter all the details of the Deal, ensuring every field with a required * is filled out to create.

A screenshot of the 'Create Deal' form in HubSpot CRM. The form has a teal header with the title 'Create Deal' and a close button. Below the header, there is a link 'Edit this form'. The first field is labeled 'Deal name' and is highlighted with a red circle. The field is currently empty.

4. Below all the fields, there is an association section. Be sure to associate a Contact, as that is required, and Company if they are in our ERP.

Associate Deal with

▼ Contacts

Associate records *

Search ▼

Association label

No label ▼

☐ Add timeline activity from this Contact ⓘ

+Add more

▼ Companies

Associate records

Search ▼

Association label * ⓘ

Primary

☐ Add timeline activity from this Company ⓘ

+Add more

5. You can create Deal from Records (Contacts, ERP Quotes, ERP Orders, as well as the email add-in from Outlook).

▼ Deals (0) +Add



Track the revenue opportunities associated with this record.

HubSpot Sales

Search for a contact



Miriam Jenkins

miriam.jenkins02@gmail.com

[Open in CRM](#)

> About

> Company

> Timeline

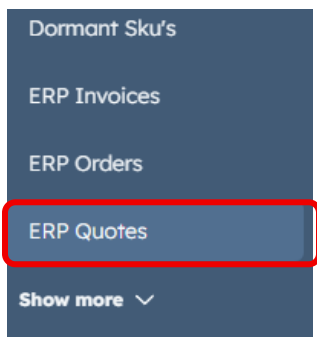
> Deals (0) +Add

> Tasks (0) +Add

> Tickets (0) +Add

Create a Deal from ERP Quote

1. In the navigation bar on the left side, click the **CRM** tab and select **ERP Quote**



2. Search for your ERP Quote by the Quote ID, Date, Customer Name, Customer ID, ETC

A screenshot of a search and filter interface. At the top is a search bar containing the text 'HPS11686'. Below it are two filter tabs: 'Quote ID' (selected) and 'Object create d'. Under the 'Quote ID' tab, there are two filter options, each with a checkbox: 'QUOTE ID' and 'HPS11686'. A horizontal scrollbar is visible at the bottom of the filter list.

Customer Name ▾ **Quote Date** ▾ **Customer ID** ▾ **ERP Quote Site ID** ▾

3. Once on the ERP Quote Record, Create the Deal from the Create a Deal Card in the center of the ERP Quote. Just like creating a Deal from the Deal page, follow the fields required with an *.

A screenshot of a web application showing a 'Create Deal' form. At the top, there is a navigation bar with four tabs: 'Line Items', 'Create Deal' (active), 'Overview', and 'Activities'. To the right of these tabs is a 'Cust' icon. Below the tabs, the main content area is titled 'Create Deal from this Quote'. Under this title, there is a section labeled '* Required Deal Details *'. The first field is 'Deal Name *', which contains the text 'Quote ID - Customer Name - Quote Date'.

Deal Definitions

Amount vs MASV

Amount – The total quoted value of the deal. This is the full dollar amount that the customer is expected to pay for all products or services included in the quote.

MASV – The annualized value of the deal if the customer continues to purchase at peak volume throughout the year. It reflects the long-term potential of the customer if this deal represents typical or scalable behavior.

Deal Probability vs Forecast Probability

Deal Probability – For Financial Forecasting

- Auto-set based on Deal Stage
- Used for: Financial forecasting and weighted pipeline reporting
- Standard: Each stage will have a default probability, and this field will be locked to ensure consistency

Forecast Probability – For Rep Confidence

- Manually updated by sales reps
- Used for: Gauging rep confidence and overall pipeline health
- Standard: Reps will be expected to update this as needed, particularly before escalation or deal review meetings

Weighted Amount vs Forecasted Amount

Weighted Amount

- Definition: Deal Amount × Deal Stage Probability (automated by stage)
- Purpose: Standardized forecast across pipeline

Forecasted Amount

- Definition: Deal Amount × Forecast Probability (set by rep)
- Purpose: Shows likeliness of winning deal based on BU confidence

Forecast Categories

- **Not Forecasted** – Identified Opportunity OR Closed Lost
- **Pipeline** – In Estimating OR Initial Quote Sent
- **Best Case** – Negotiation OR Final Quote Sent
- **Commit** – Pilot Production
- **Closed Won** – Closed Won