Advanced Automation Sequence: Create a Deal

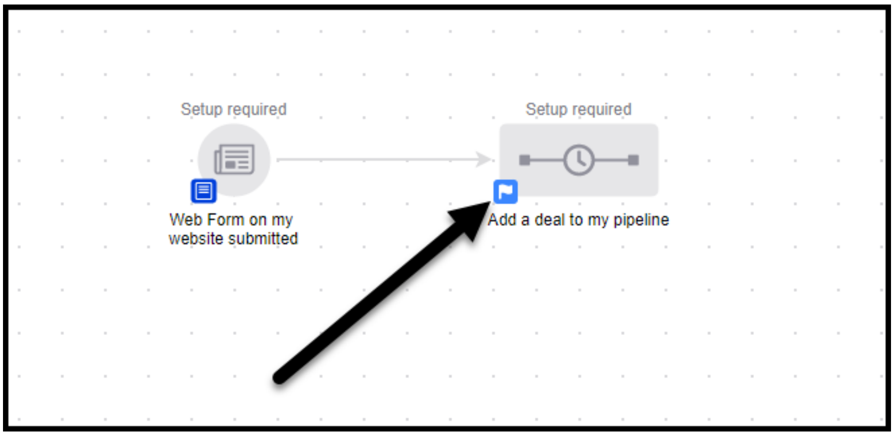
This article applies to:

You can use the **Create a Deal** automation to trigger adding a deal card to your sales pipeline after a goal is achieved.

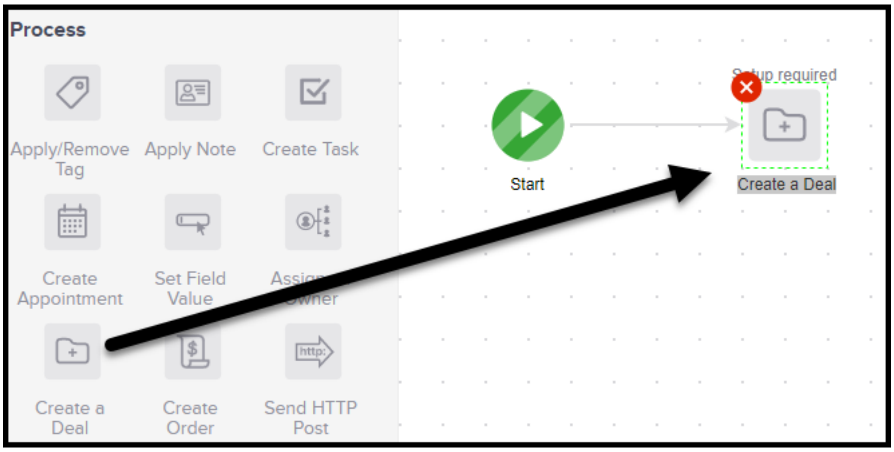
A good example of this use case is a web form or a internal form goal connected to a sequence that includes the **Create a Deal** process.

How to configure the Create a Deal process

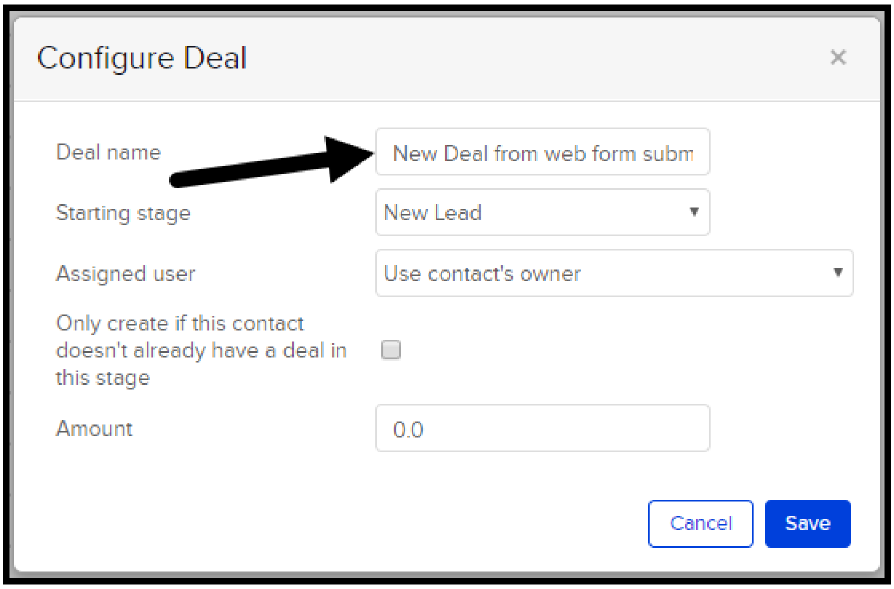
1. Double click the sequence in which you want the **Add a Deal** process to occur.



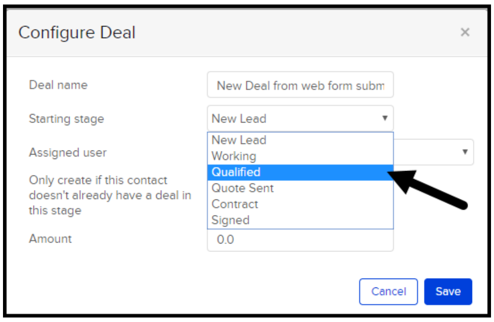
2. Drag the **Create a Deal** process onto the canvas and double click the **Create a Deal** icon



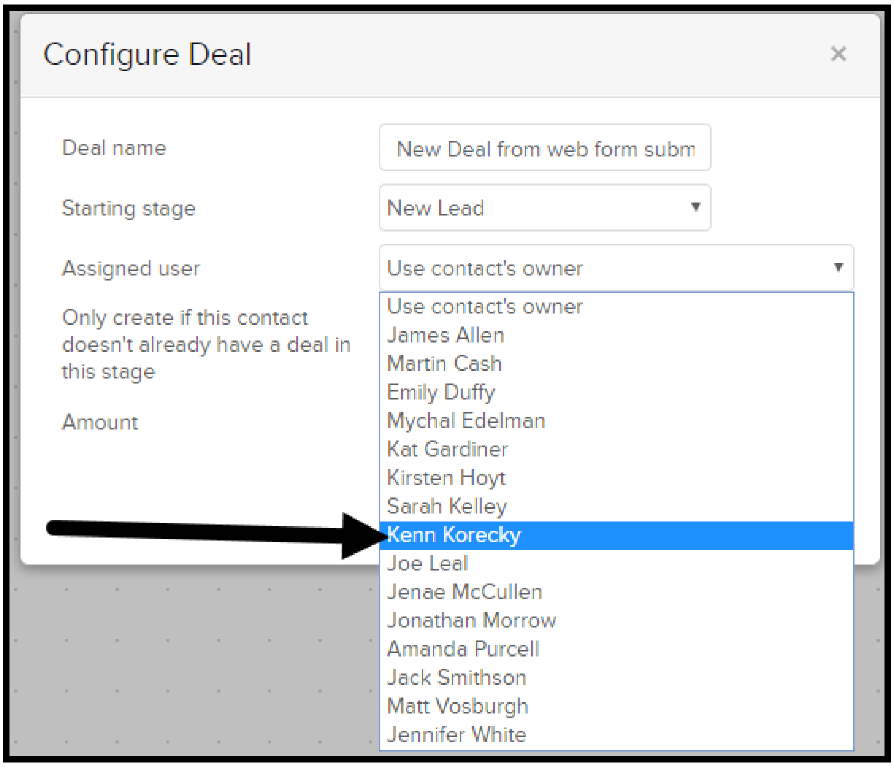
3. Add a **Deal name.** This will be visible on your card in the **Pipeline**



4. Select the **Starting stage** in your pipeline for deals created by this automation

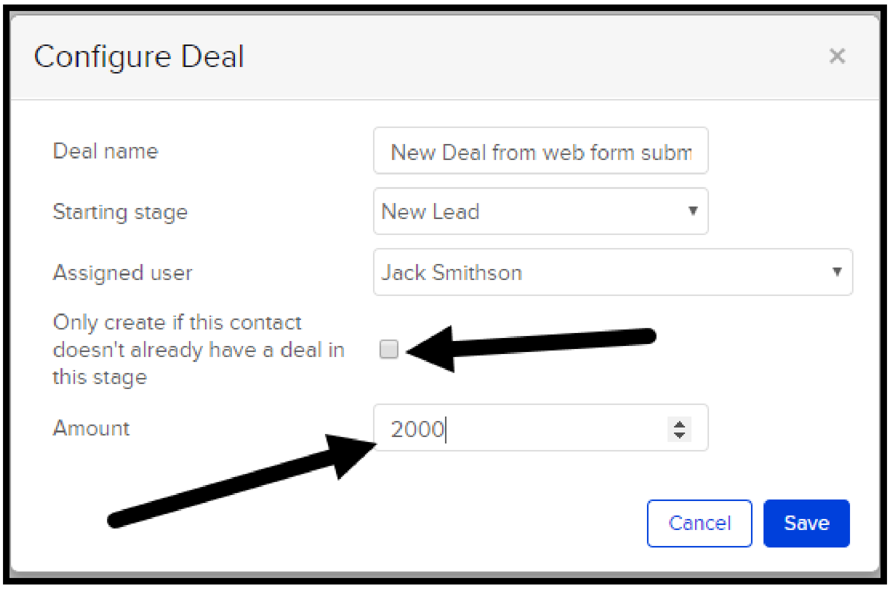


5. Select an **Assigned user** for deals created by this automation

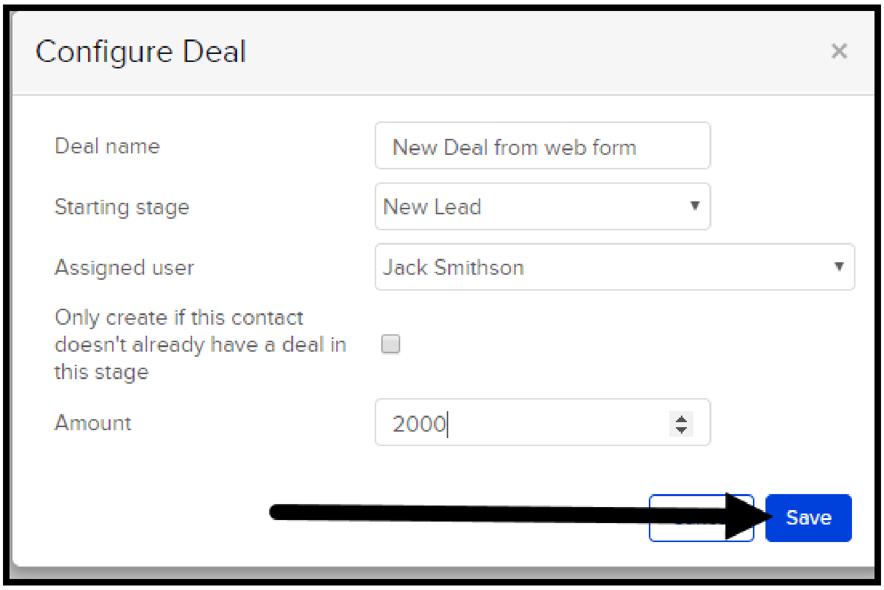


(Optional) Check the box to **Only create if this contact doesn't already have a deal in this stage.** This option can minimize the accidental creation of multiple deal cards for the same deal.

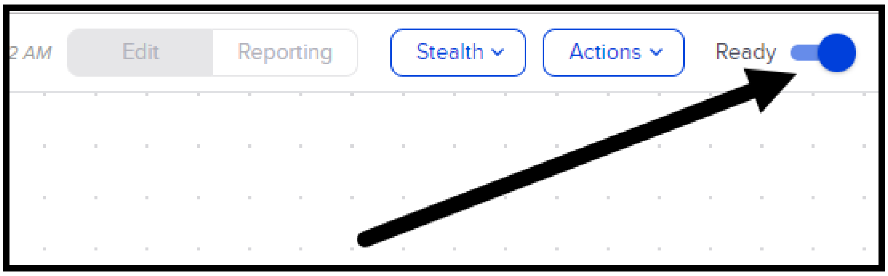
6. Add an estimated deal value to the **Amount** field



7. Click **Save** when all fields are complete



8. Toggle the sequence from **Draft** to **Ready** in the upper right hand corner. This step is mandatory for the publishing this automation.



9. Click **Publish** to launch this automation. Once published, a new deal will be added to your pipeline whenever the goal is achieved.