

# 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.

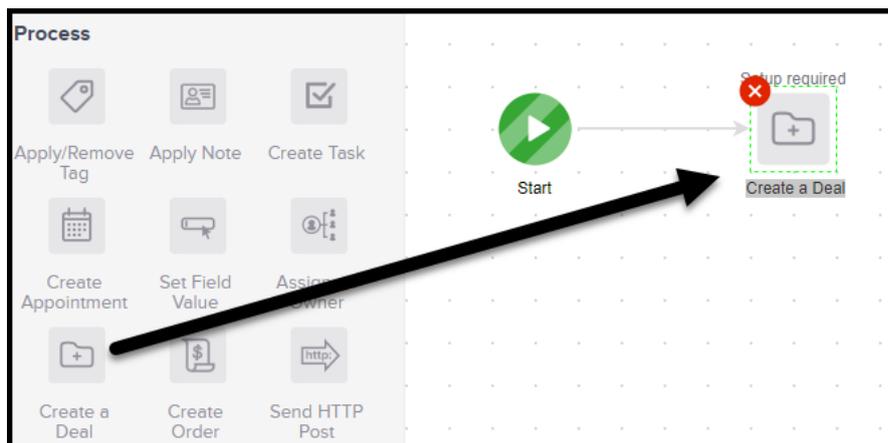
A good example of this use case is a web form or an internal form goal connected to a sequence that includes the **Create a Deal** process.

## 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**

Configure Deal

Deal name: New Deal from web form subm

Starting stage: New Lead

Assigned user: Use contact's owner

Only create if this contact doesn't already have a deal in this stage:

Amount: 0.0

Cancel Save

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

Configure Deal

Deal name: New Deal from web form subm

Starting stage: New Lead

Assigned user: Use contact's owner

Only create if this contact doesn't already have a deal in this stage:

Amount: 0.0

Cancel Save

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

Configure Deal

Deal name: New Deal from web form subm

Starting stage: New Lead

Assigned user: Use contact's owner

Only create if this contact doesn't already have a deal in this stage:

Amount: 0.0

Use contact's owner

James Allen

Martin Cash

Emily Duffy

Mychal Edelman

Kat Gardiner

Kirsten Hoyt

Sarah Kelley

**Kenn Korecky**

Joe Leal

Jenae McCullen

Jonathan Morrow

Amanda Purcell

Jack Smithson

Matt Vosburgh

Jennifer White

(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

Configure Deal

Deal name: New Deal from web form subm

Starting stage: New Lead

Assigned user: Jack Smithson

Only create if this contact doesn't already have a deal in this stage:

Amount: 2000

Buttons: Cancel, Save

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

Configure Deal

Deal name: New Deal from web form

Starting stage: New Lead

Assigned user: Jack Smithson

Only create if this contact doesn't already have a deal in this stage:

Amount: 2000

Buttons: Save

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

2 AM Edit Reporting Stealth Actions Ready

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

