



HubSpot – Deal Pipeline Guide

When creating and moving a deal in HubSpot there are some things you must know beforehand!

Lead

When creating a “Lead” in the pipeline you can associate financials to the deal. Reporting will start being affected at the 10% stage. You must enter \$0 if there is no cost.

Moving Through the Pipeline

You can move a deal by dragging and dropping it to the next % stage or changing the % directly in the Deal record. When you start moving deals through the pipeline you will notice that some fields become mandatory the higher the % gets. The following fields are mandatory at each stage, plus additional fields are mandatory the higher you move through the pipeline.

PLEASE NOTE:

- Total cost and total sell will automatically calculate
- If you have NO cost, you MUST fill in \$0
- Always check previously filled out fields when updating deals!

At 10%

Closed Date

Margin/GP % (This must be a whole number, for example 17 for 17%)

At Least the Knoll Cost (Fill in any other applicable costs, must enter \$0 if there is no cost, this will automatically calculate total sell and total cost)

A&D, Broker/PM, and GC Contacts and Companies (choose N/A if not known)

Invoice Date

Invoice Timing



At 25%

All the above plus

Knoll Studio Cost (Must enter \$0 if there is no cost)

Muuto Cost (Must enter \$0 if there is no cost)

Architectural Product Cost (Must enter \$0 if there is no cost)

Technology Product Cost (Must enter \$0 if there is no cost)

Other Costs (Load, Freight, etc.) (Must enter \$0 if there is no cost)

At 50%

All the above plus

Installation Date

Deposit Requirement

At 75%

All the above - This is a great time to double check costs and make any adjustments if needed!

At 90%

All the above - This is a great time to double check costs and make any adjustments if needed!

ON HOLD

Deal Description

CLOSED ORDERED

Closed Won Reason

CLOSED LOST

Closed Lost Reason