

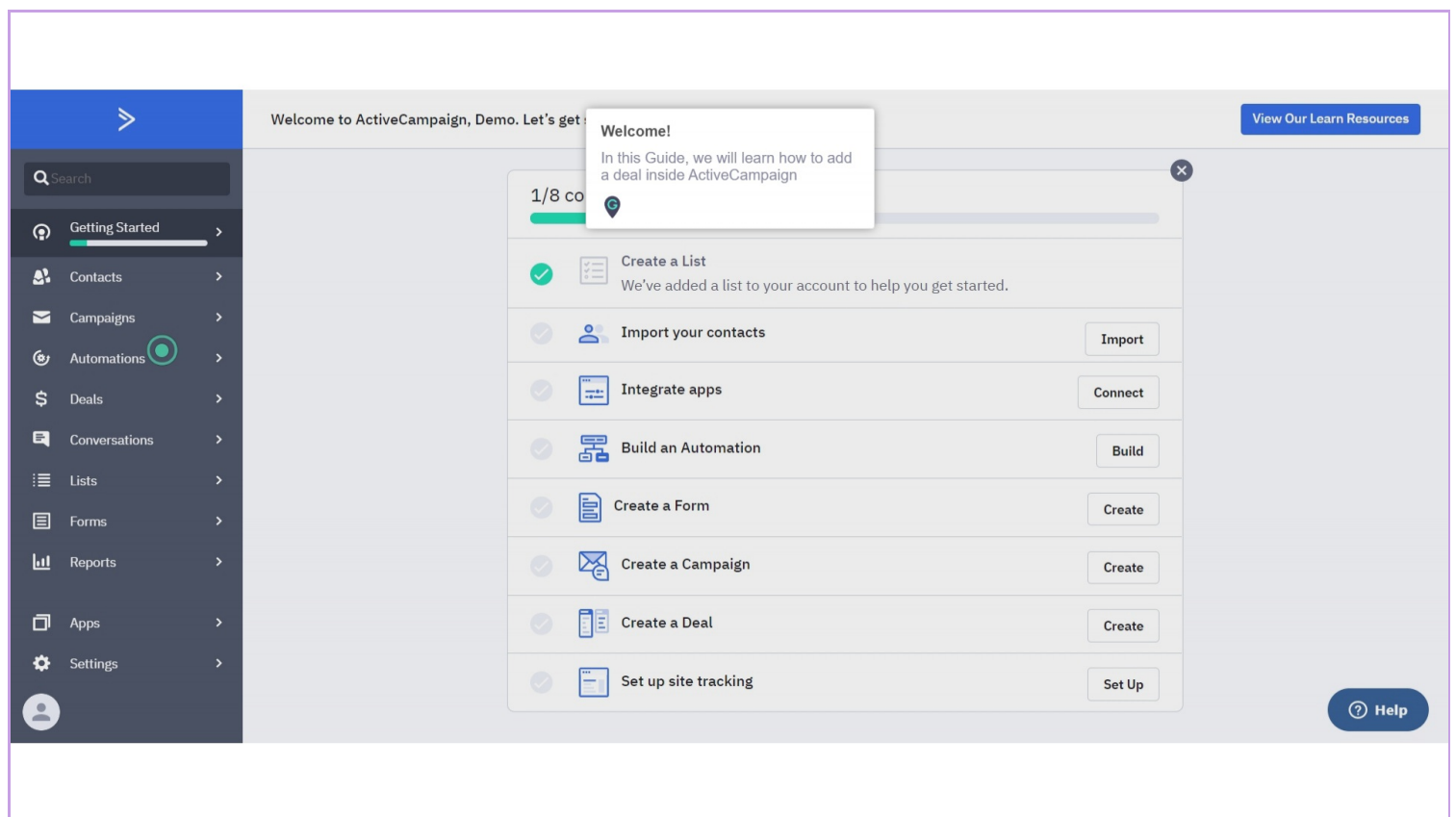


How to add a deal inside ActiveCampaign

Step: 01

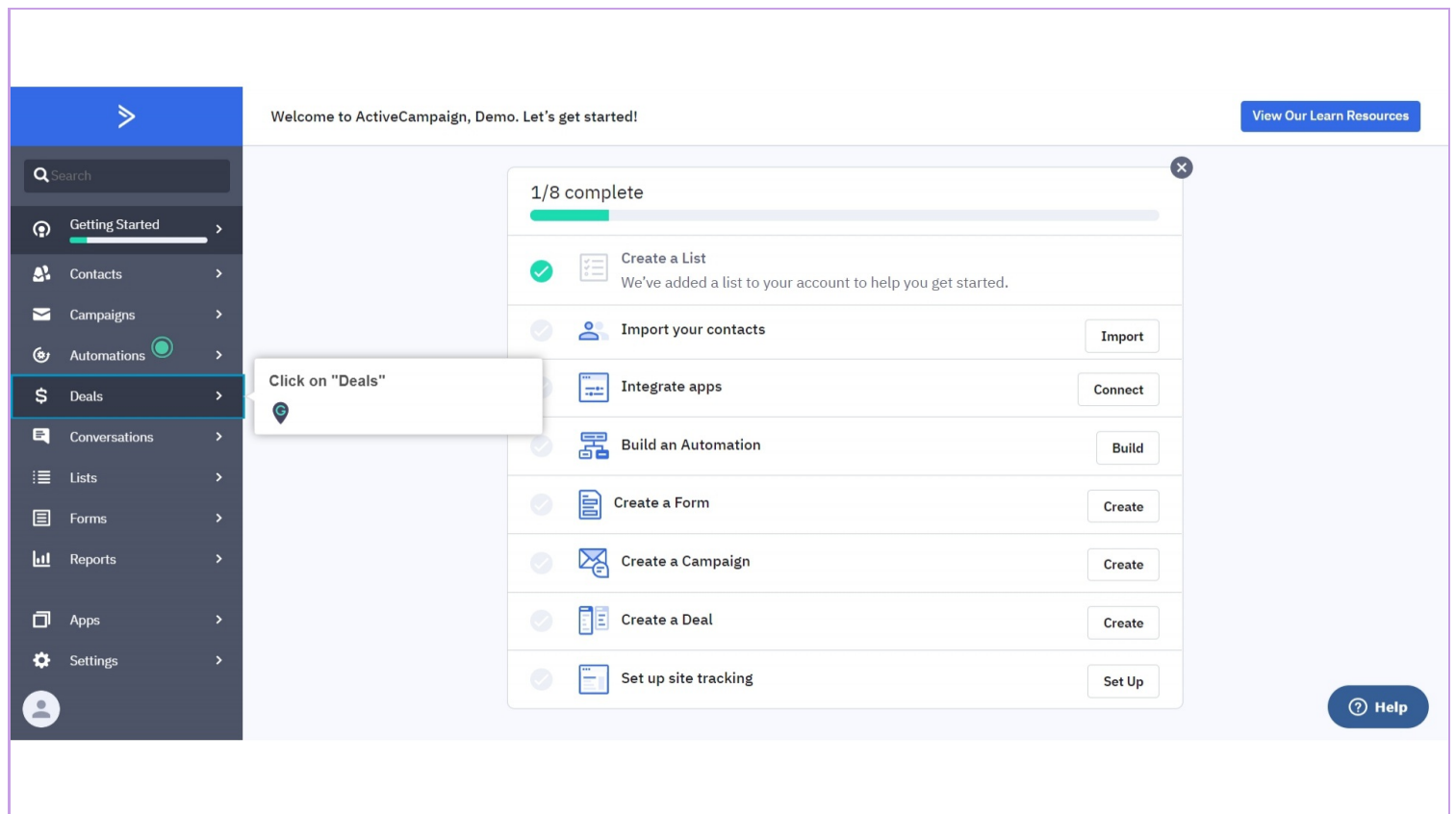
Welcome!

In this Guide, we will learn how to add a deal inside ActiveCampaign



Step: 02

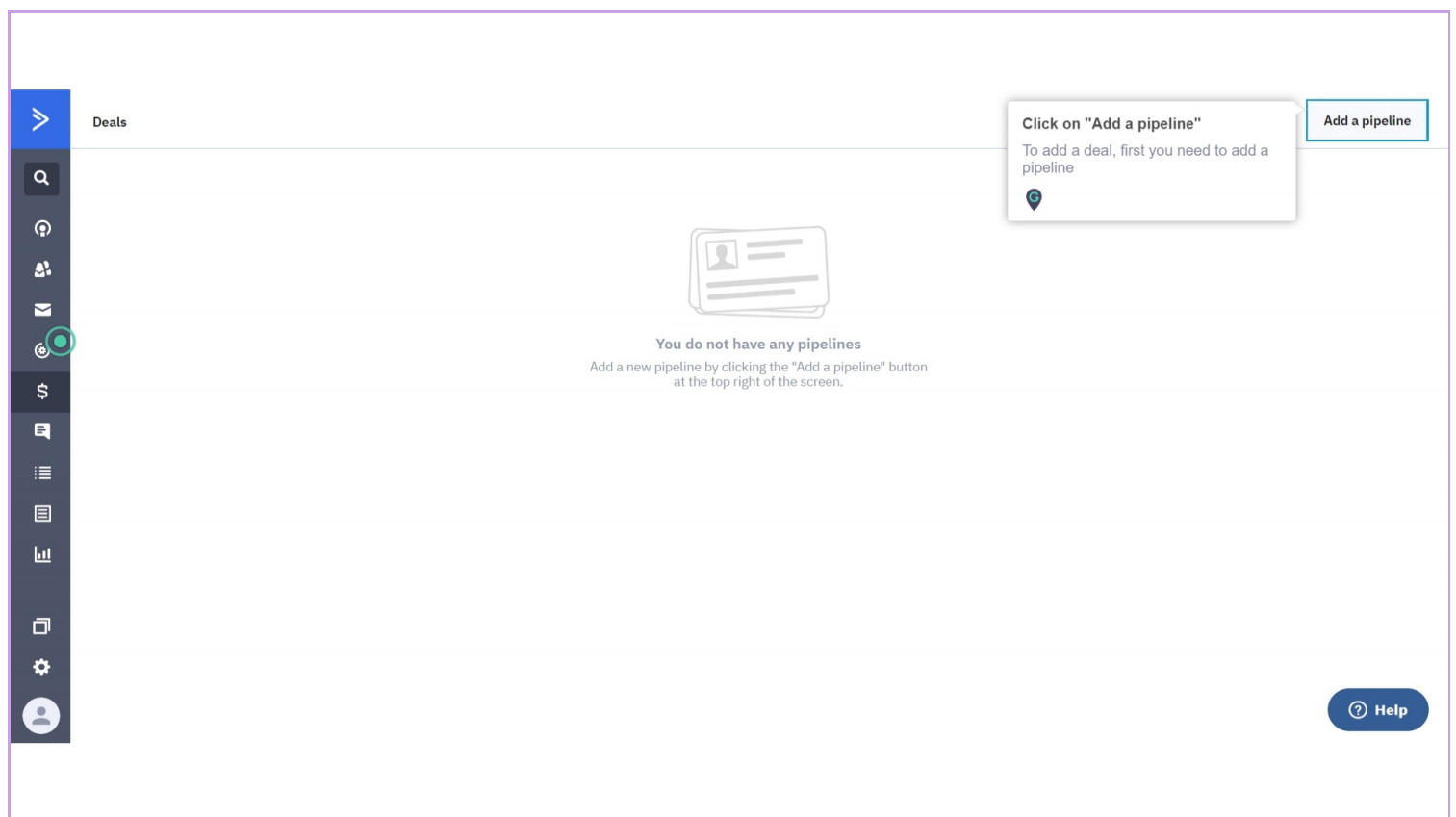
Click on "Deals"



Step: 03

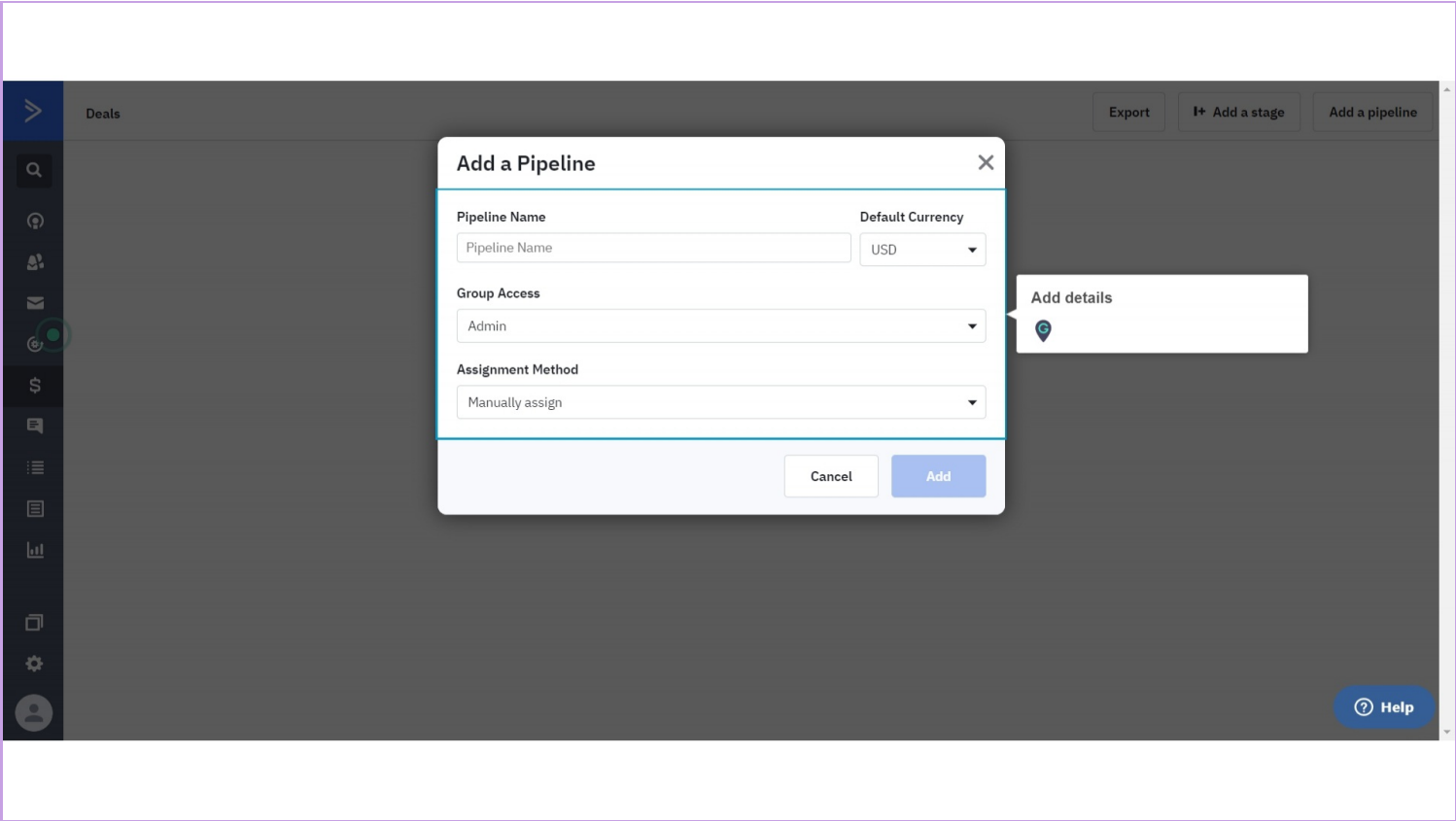
Click on "Add a pipeline"

To add a deal, first you need to add a pipeline



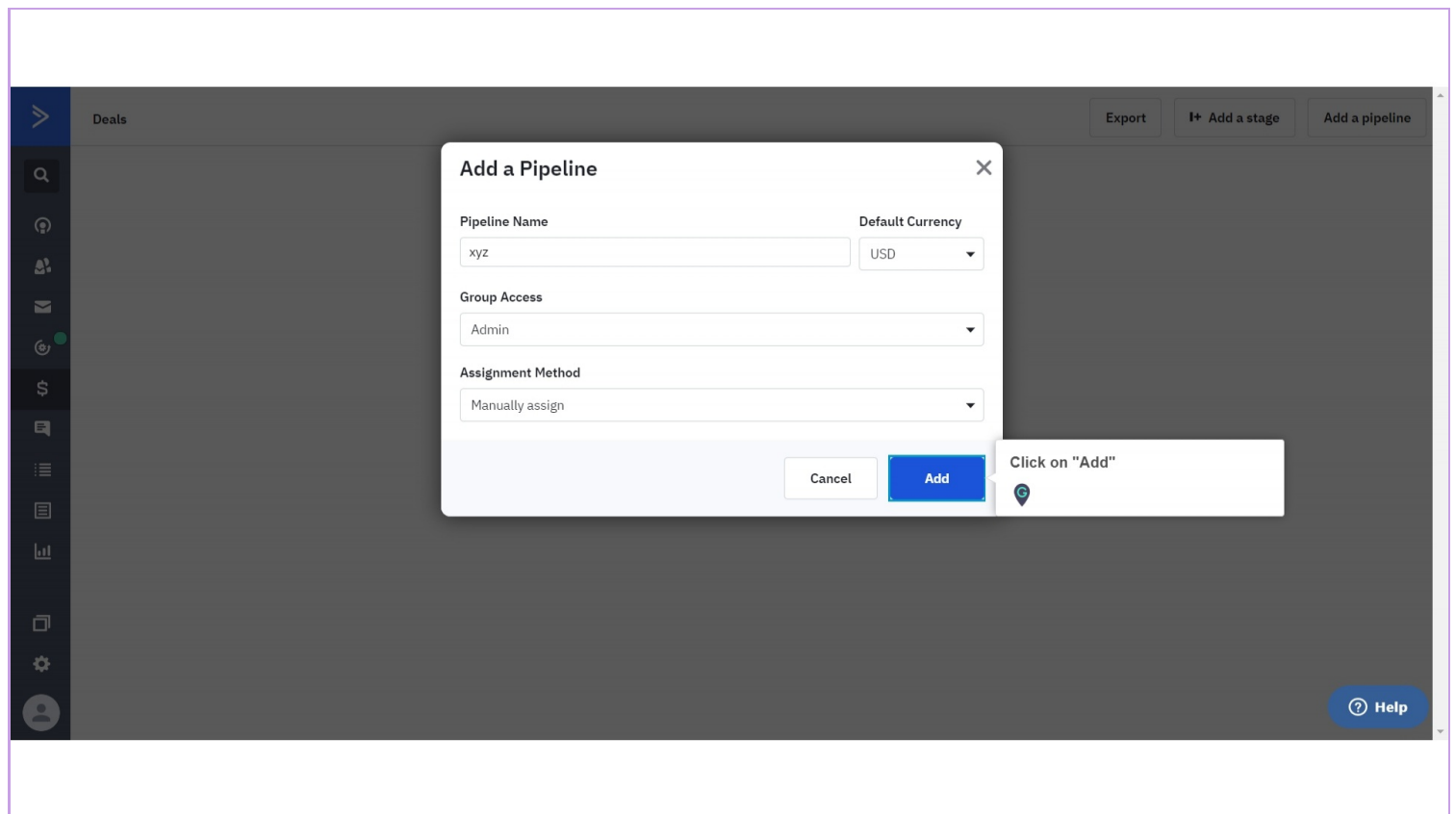
Step: 04

Add details



Step: 05

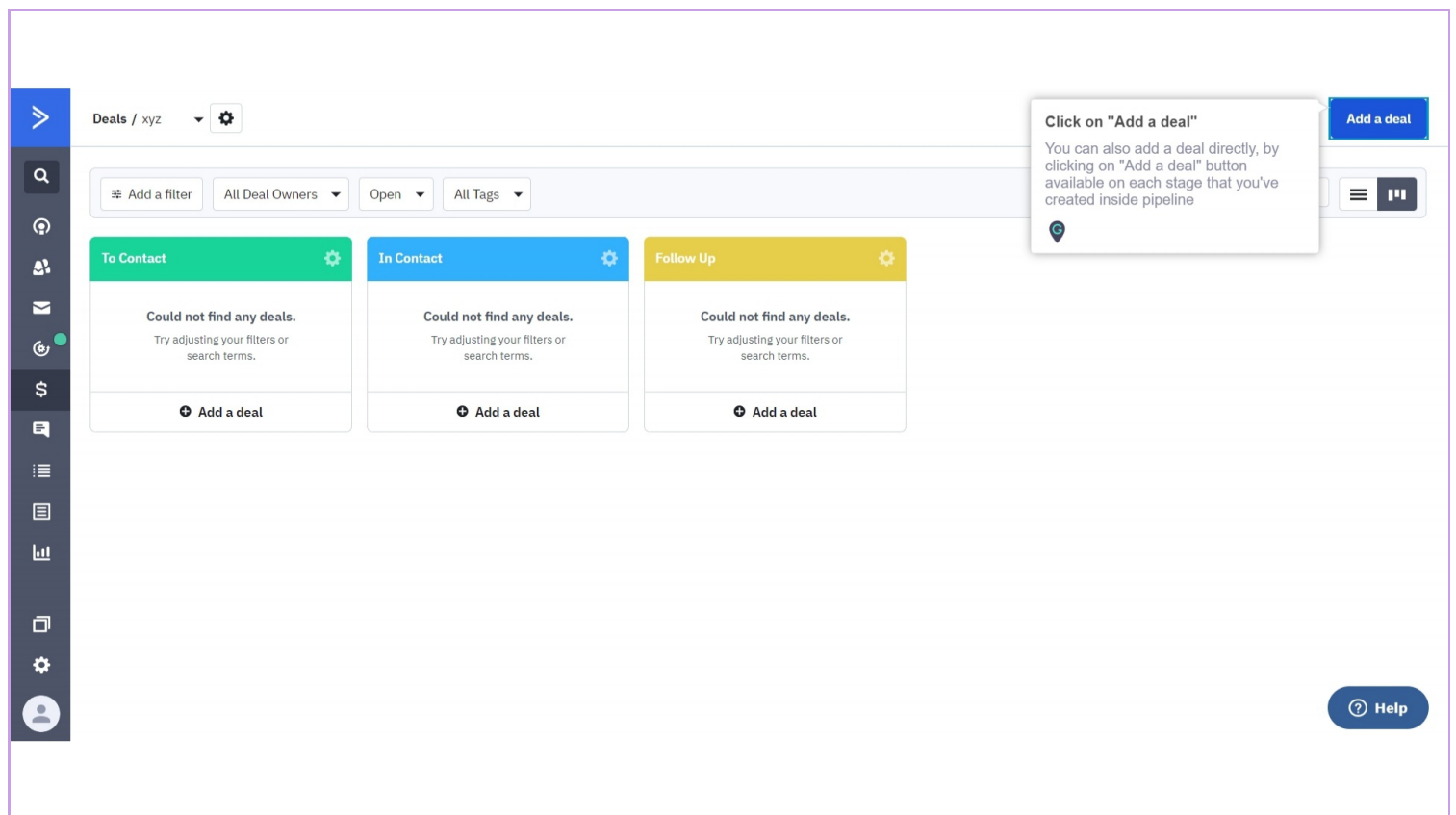
Click on "Add"



Step: 06

Click on "Add a deal"

You can also add a deal directly, by clicking on "Add a deal" button available on each stage that you've created inside pipeline



Step: 07

Fill out required information to create a new deal

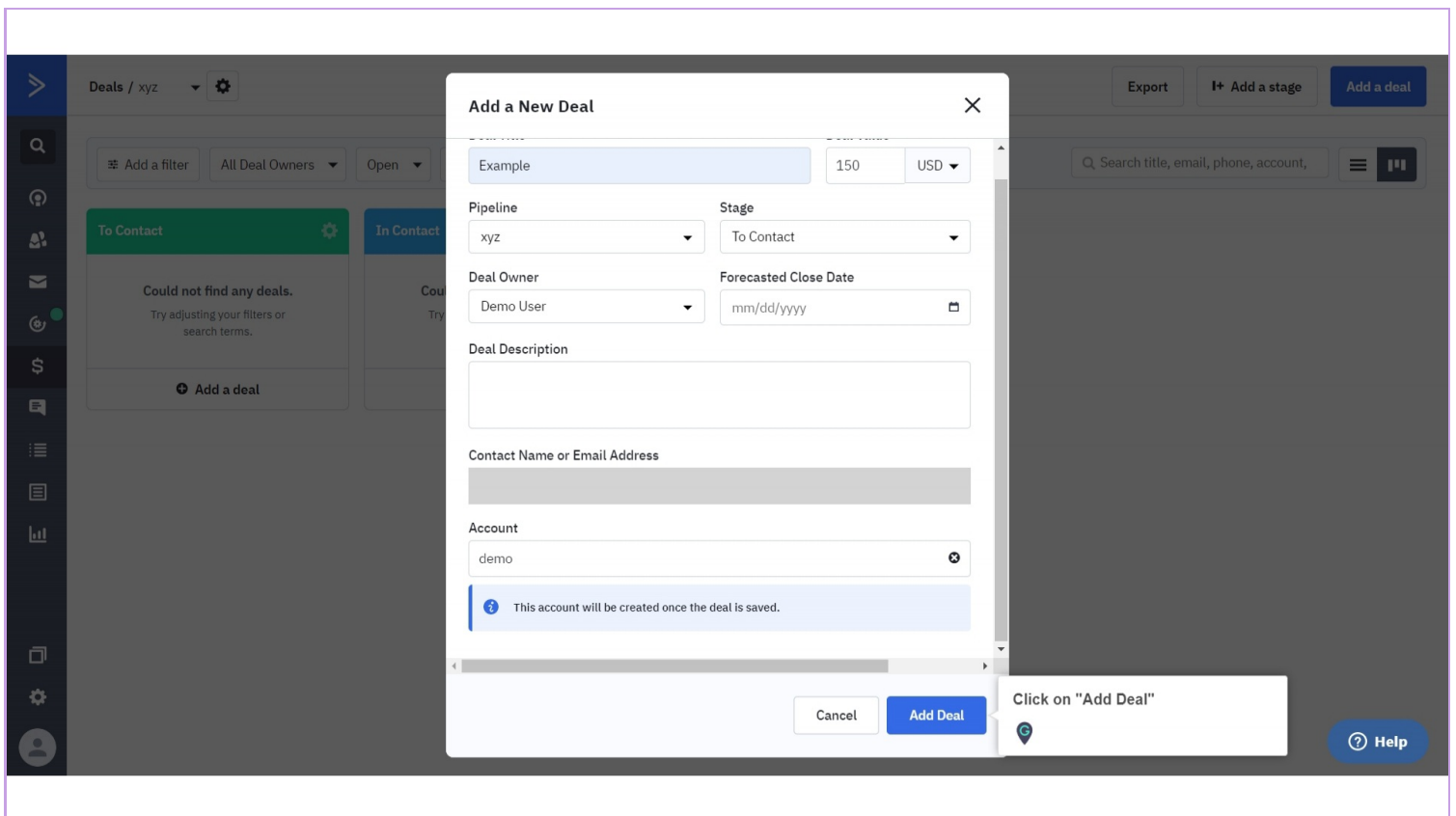
The screenshot shows a CRM interface with a modal window titled "Add a New Deal". The background shows a sidebar with navigation icons and a main area with a "To Contact" stage. The modal form contains the following fields:

- Deal Title**: A text input field.
- Deal Value**: A numeric input field with "100" and a currency dropdown set to "USD".
- Pipeline**: A dropdown menu with "xyz" selected.
- Stage**: A dropdown menu with "To Contact" selected.
- Deal Owner**: A dropdown menu with "Demo User" selected.
- Forecasted Close Date**: A date input field with a placeholder "mm/dd/yyyy" and a calendar icon.
- Deal Description**: A large text area.
- Contact Name or Email Address**: A text input field with a placeholder "Enter a name or email".
- Account**: A text input field with a placeholder "Enter an account".

At the bottom of the modal are "Cancel" and "Add Deal" buttons. A callout bubble on the right says "Fill out required information to create a new deal". The background interface includes a search bar, filters, and a "Help" button.

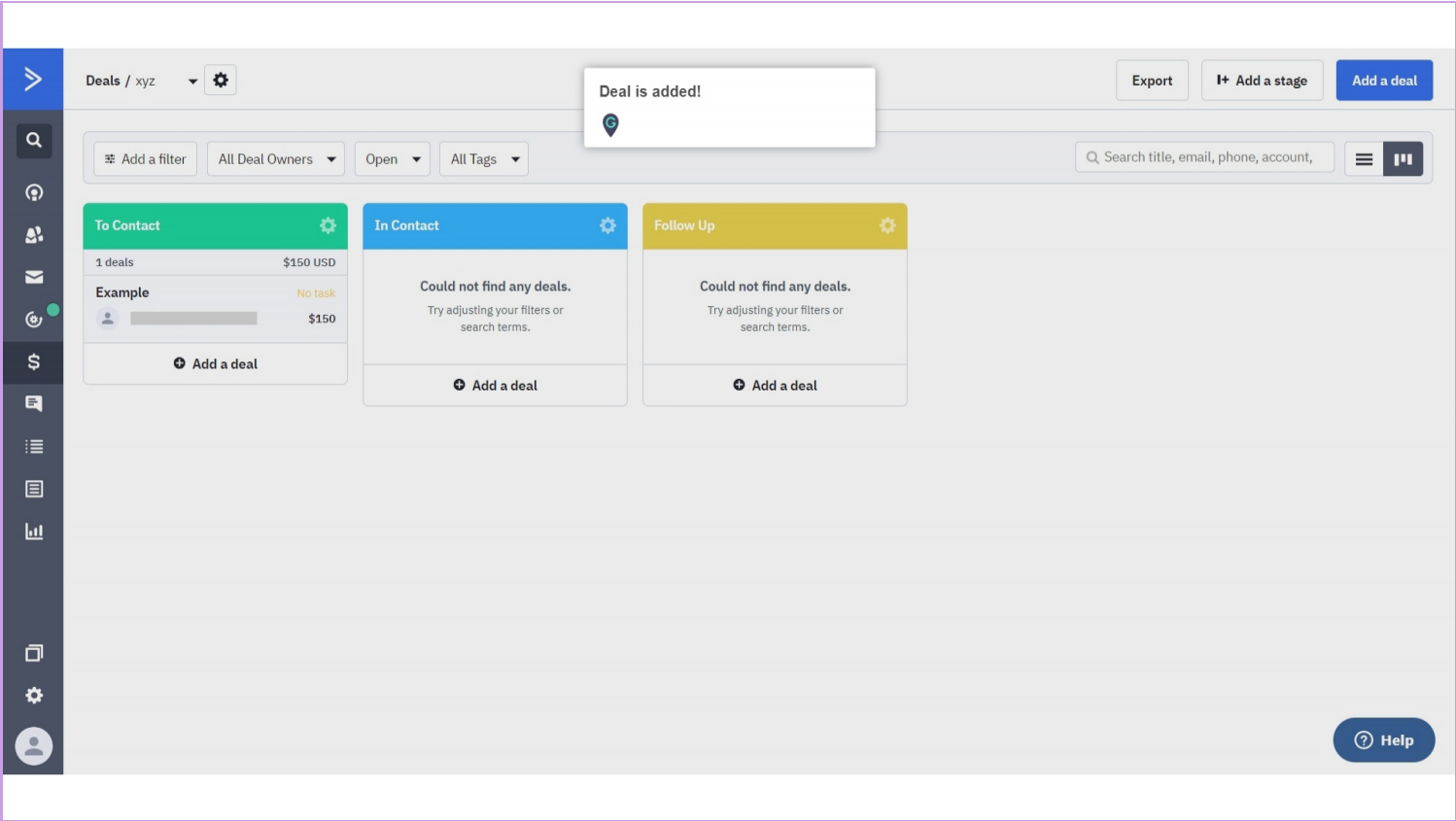
Step: 08

Click on "Add Deal"



Step: 09

Deal is added!



Thank You!

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