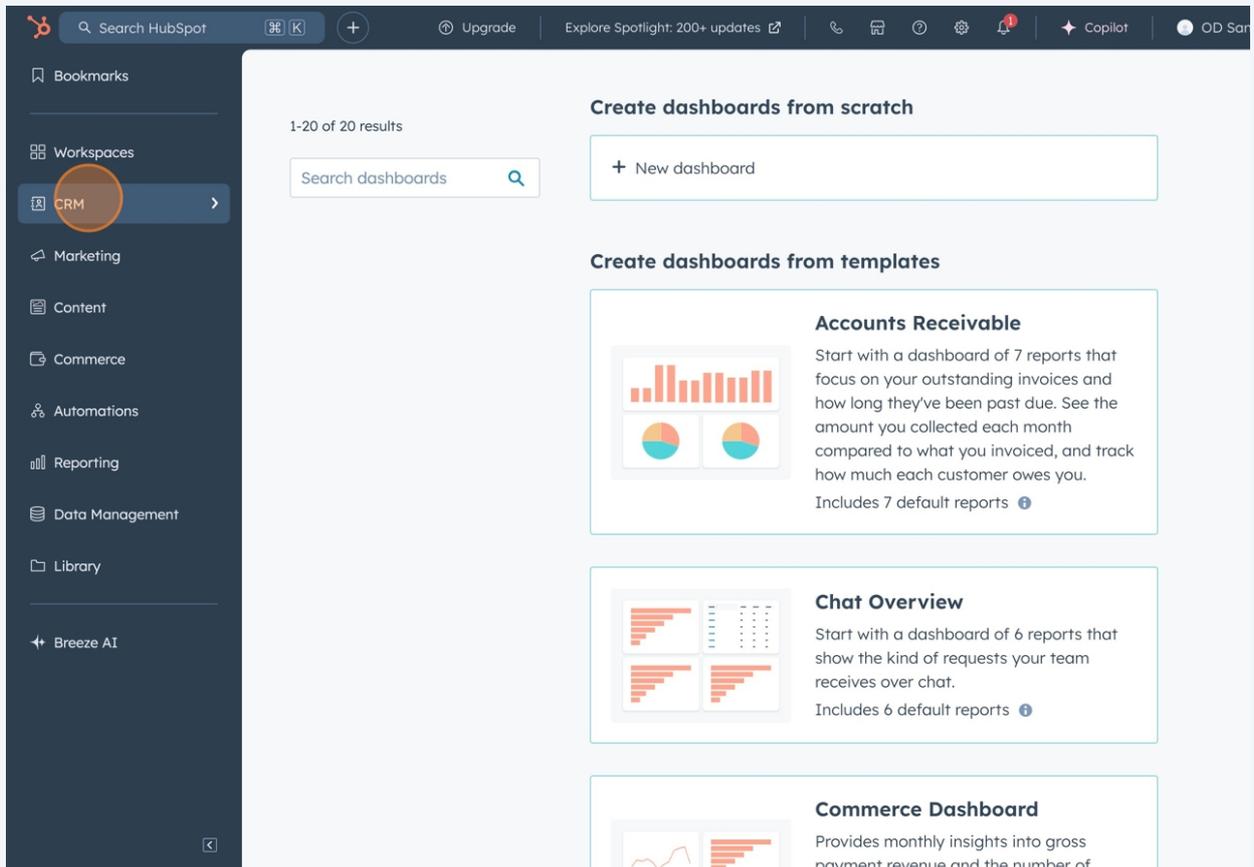


1 Locate the object you would like to duplicate



Search HubSpot | Upgrade | Explore Spotlight: 200+ updates | Copilot | OD Sar

Bookmarks

Workspaces

CRM

Marketing

Content

Commerce

Automations

Reporting

Data Management

Library

Breeze AI

1-20 of 20 results

Search dashboards

Contacts

Companies

Deals

Tickets

Lists

Inbox

Calls

Tasks

Create dashboards from scratch

+ New dashboard

Create dashboards from templates

Accounts Receivable

Start with a dashboard of 7 reports that focus on your outstanding invoices and how long they've been past due. See the amount you collected each month compared to what you invoiced, and track how much each customer owes you. Includes 7 default reports

Chat Overview

Start with a dashboard of 6 reports that show the kind of requests your team receives over chat. Includes 6 default reports

Commerce Dashboard

Provides monthly insights into gross payment revenue and the number of

Commerce

Automations

Reporting

Data Management

Library

Breeze AI

NEW DEAL AMOUNT
\$1K
 Average per deal: \$1K

AVERAGE DEAL AGE
17.4 minutes

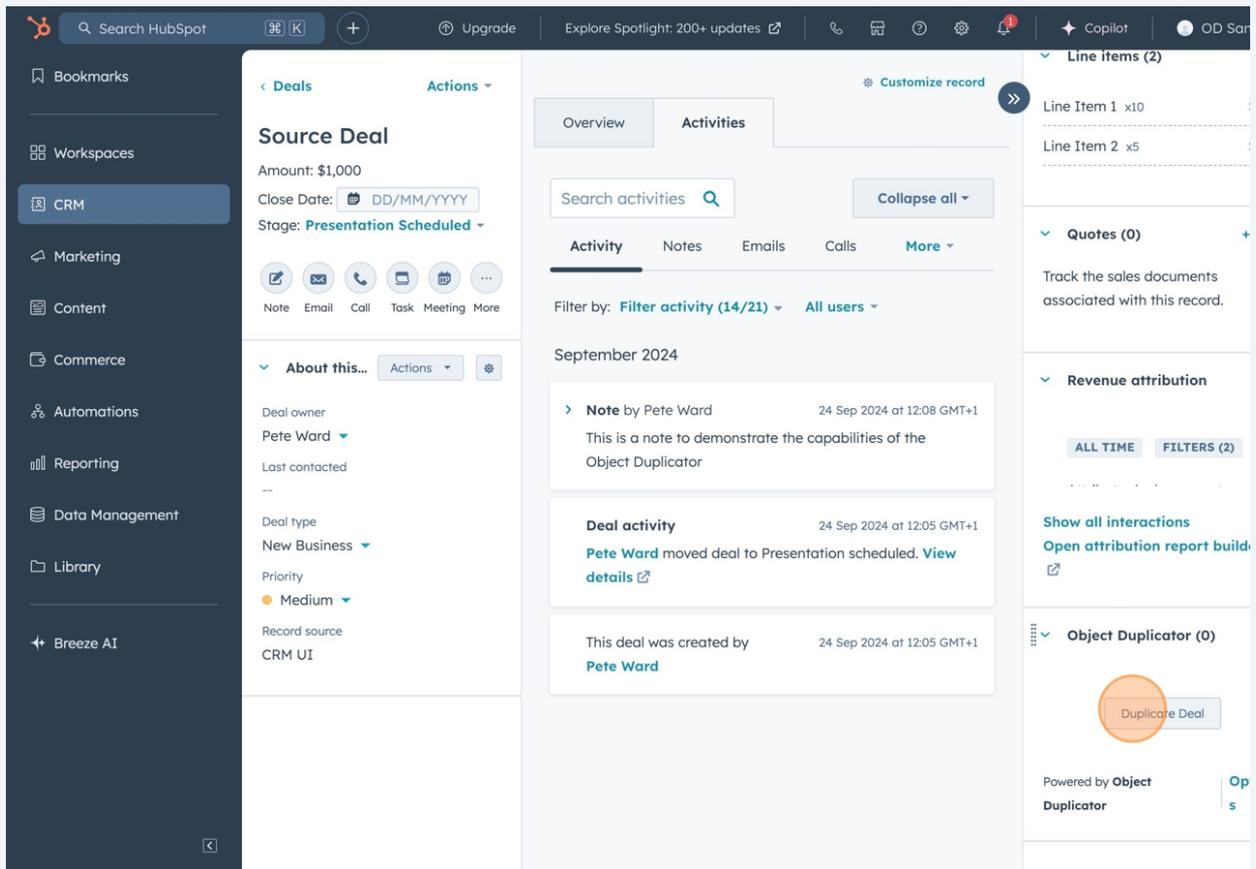
Search name or descrip

<input type="checkbox"/>	DEAL NAME	DEAL STAGE	C
<input type="checkbox"/>	Source Deal	Presentation Scheduled (Sal...	-

< Prev 1 Next > 25 per page

2

Locate the 'Object Duplicator' card on the right, and click the button to Duplicate



3

Customise the options as desired and click 'Duplicate'

Object Duplicator - Duplicate Deal ✕

Select which options apply when the deal is duplicated

- Maintain Associations
- Include Engagements
- Include Line Items
- Include Quotes
- Copy Create Date
- Create association to source deal

Rename Deal
[Optional] Enter a name for the new deal

Pipeline
Select a pipeline for the new deal

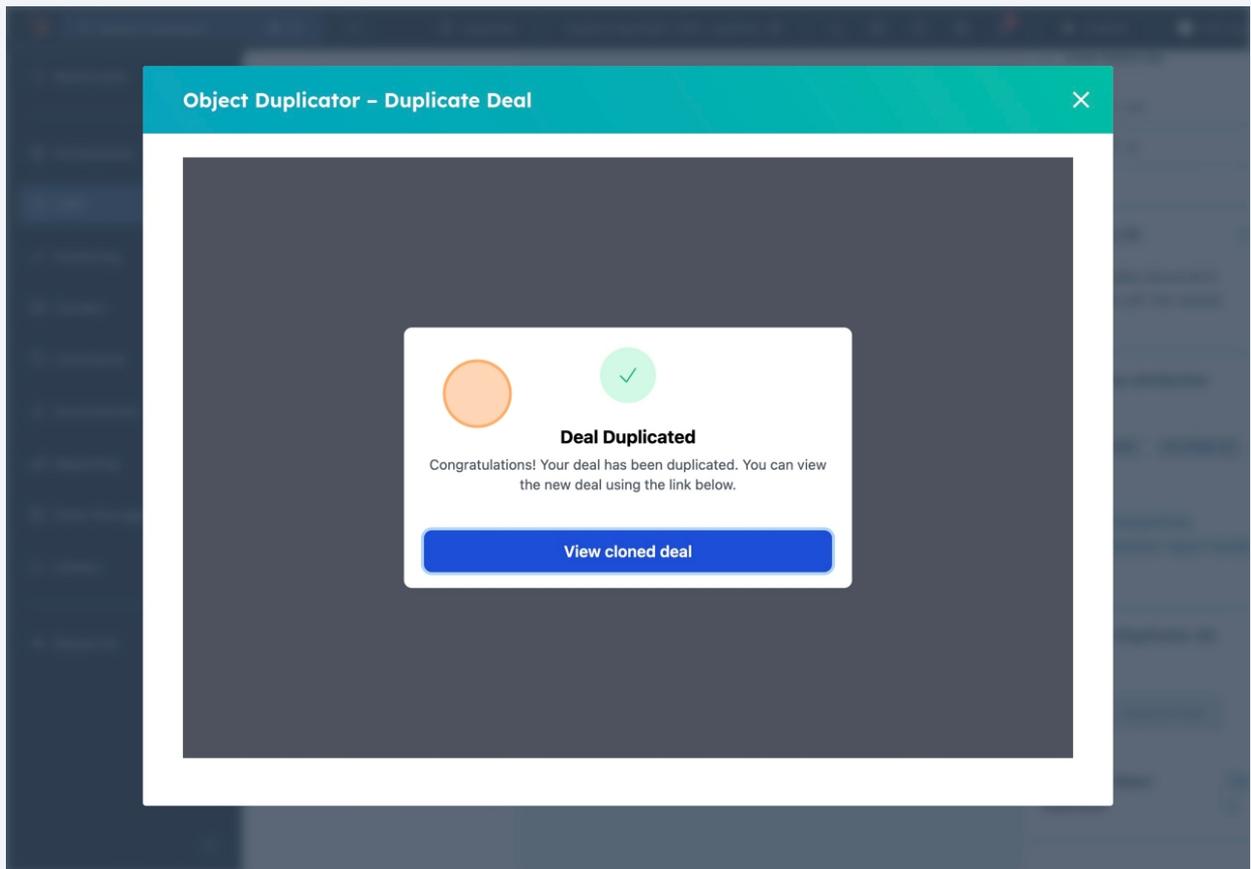
Stage
Select a stage for the new deal

Owner
Select an owner for the new deal

Close Date
The close date for the new deal, clear field to leave blank

4

After a short while the object will be duplicated and you can click the View button to go directly to the duplicated version.



5

In the duplicated object you will see all properties/notes/associations have been included as per the options you selected

The screenshot displays the HubSpot CRM interface for a record titled "Destination Deal". The interface is divided into several sections:

- Left Sidebar:** Contains navigation options such as Bookmarks, Workspaces, CRM (highlighted), Marketing, Content, Commerce, Automations, Reporting, Data Management, Library, and Breeze AI.
- Record Header:** Shows "Destination Deal" with an "Amount: \$1,000", "Close Date" (DD/MM/YYYY), and "Stage: Contract Sent".
- Activity Panel:** Features a search bar, a "Collapse all" button, and tabs for Activity, Notes, Emails, and Calls. It is filtered by "Filter activity (14/21)" and "All users". The activities listed are:
 - Deal activity:** 24 Sep 2024 at 12:23 GMT+1. "Deal moved to Contract sent by Integration. View details"
 - Note by Pete Ward:** 24 Sep 2024 at 12:08 GMT+1. "This is a note to demonstrate the capabilities of the Object Duplicator"
 - Note by Pete Ward:** 24 Sep 2024 at 12:08 GMT+1. "This is a note to demonstrate the capabilities of the Object Duplicator"
 - System message:** "This deal was created" 24 Sep 2024 at 12:23 GMT+1
- Right Panel:** Shows associated entities:
 - Contacts (1):** Pete Ward, Head of Integrations and R&D at Digital Media Stream, pete@digitalmedi..., Phone: --
 - Companies (1):** Digital Media Stream digitalmediastr..., Phone: --
 - Tickets (0):** Track the customer requests associated with this record.
 - Payment Links (0):** Give customers a fast, flexible way to pay. Add a payment link to accept a payment and associate with this record. Includes a "Set up payments" button.