



# Deal Duplicator

FOR HUBSPOT

USERS MANUAL

# Table of Contents

How to install	<b>03</b>
How to Duplicate a Deal Manually	<b>05</b>
How to Duplicate a Deal Automatically	<b>09</b>
How to uninstall	<b>11</b>
Frequently Asked Questions	<b>13</b>

This is a manual for users of Deal Duplicator,  
we hope this could be helpful in your journey.

# How to install

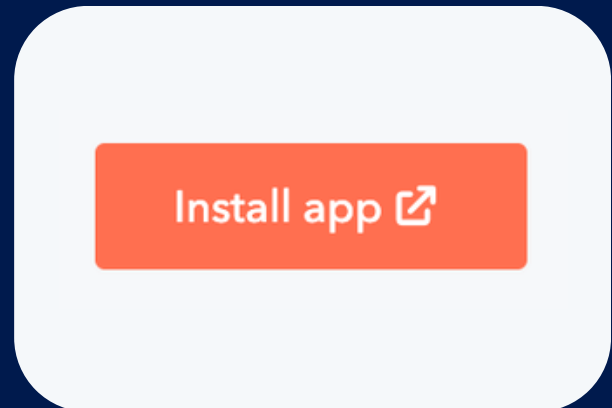
## Step 1

Go to [HubSpot Marketplace](#).

---

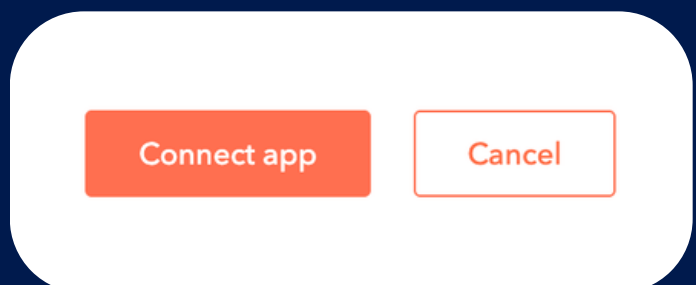
## Step 2

Click into "Install App".



## Step 3

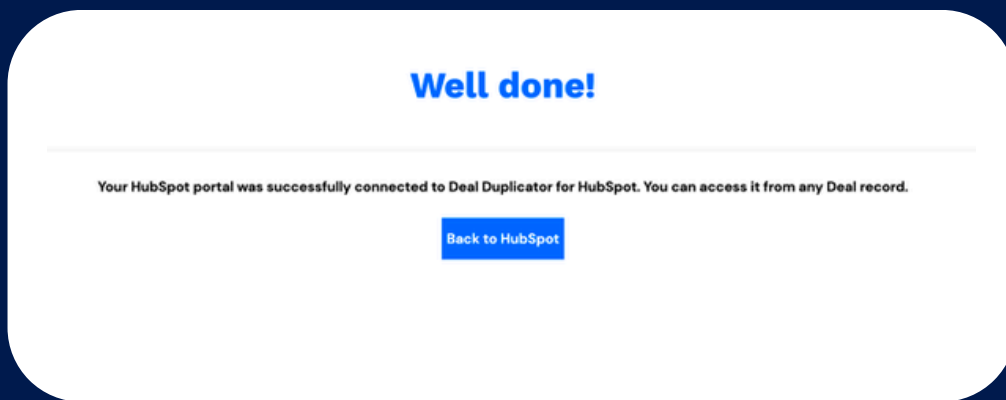
Click into Connect app to accept permissions requested and proceed.



# How to install

## Step 4

Click into blue button "Back to HubSpot" to go to your pipeline and begin to use Deal Duplicator.

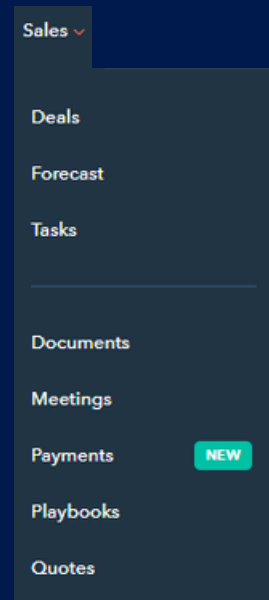


# How to Duplicate a Deal Manually

## Step 1

Navigate to the Deal you would like to clone. You can find all Deals by going to:

**Sales → Deals → All Pipelines.**



## Step 2

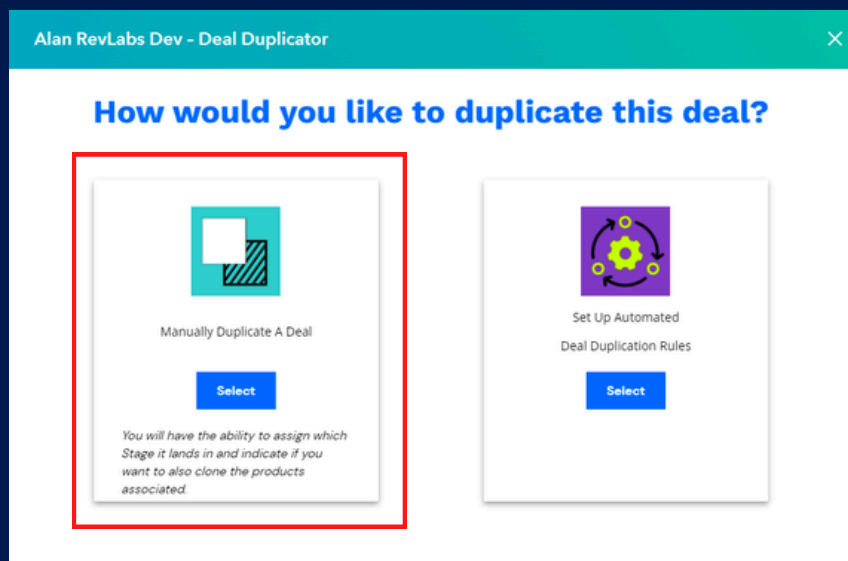
Once you are on the Deal detail screen, scroll down to the Deal Duplicator module on the right side panel.



# How to Duplicate a Deal Manually

## Step 3

Click on the Deal Duplicator button to open options for duplicating the deal.



## Step 4

Click the blue “Select” button under the “Manually Duplicate Deal” option on the left.

THIS WILL OPEN THE SETTINGS SCREEN TO CONFIGURE WHERE YOU WANT TO DUPLICATE THE CURRENT DEAL.

Where would you like to create your duplicated deal?

Set the Deal Pipeline:  
Downgrade Pipeline ▼

Set the Deal Stage:  
Product 3 ▼

Check the box if you'd like to duplicate the Products associated with this deal: ☐

Back Duplicate Deal

# How to Duplicate a Deal Manually

Where would you like to create your duplicated deal?

Set the Deal Pipeline:  
Downgrade Pipeline ▾

Set the Deal Stage:  
Product 3 ▾

Check the box if you'd like to duplicate the Products associated with this deal: ☐

[Back](#) [Duplicate Deal](#)

## Step 5

Once you've selected where to duplicate the deal and checked the box if you'd like to also duplicate the Products associated with the Deal, click the blue "Duplicate Deal" button to complete the process.

# How to Duplicate a Deal Automatically

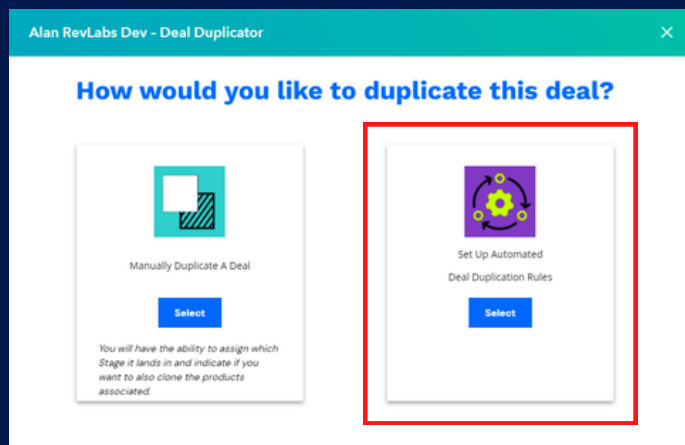
## Step 1

Navigate to any Deal record to access the Deal Duplicator module on the right hand panel.

---

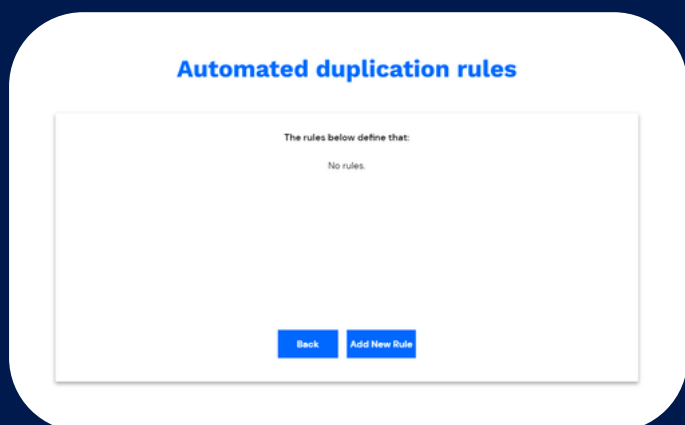
## Step 2

Select the option on the right to "Set Up Automated Deal Duplication Rules".



## Step 3

Click the button to add a new rule.





# How to Duplicate a Deal Automatically

## Step 4

In the box that pops up, set the Pipeline and Deal Stage that should trigger the duplication of a Deal that has landed in that Pipeline/Stage. Then choose which Pipeline and Stage the duplicated Deal should be created in. When you have selected the correct options from the dropdowns, then click "Create Rule."

**Create a new rule to duplicate deals**

1

If a deal in pipeline:

Customer activation pipeline

Moves to stage:

Unsatisfied

2

Then, create a deal in pipeline:

Customer deactivation pipeline

In stage:

Disable users access

Associate Deal with Library Products? ☐

Back

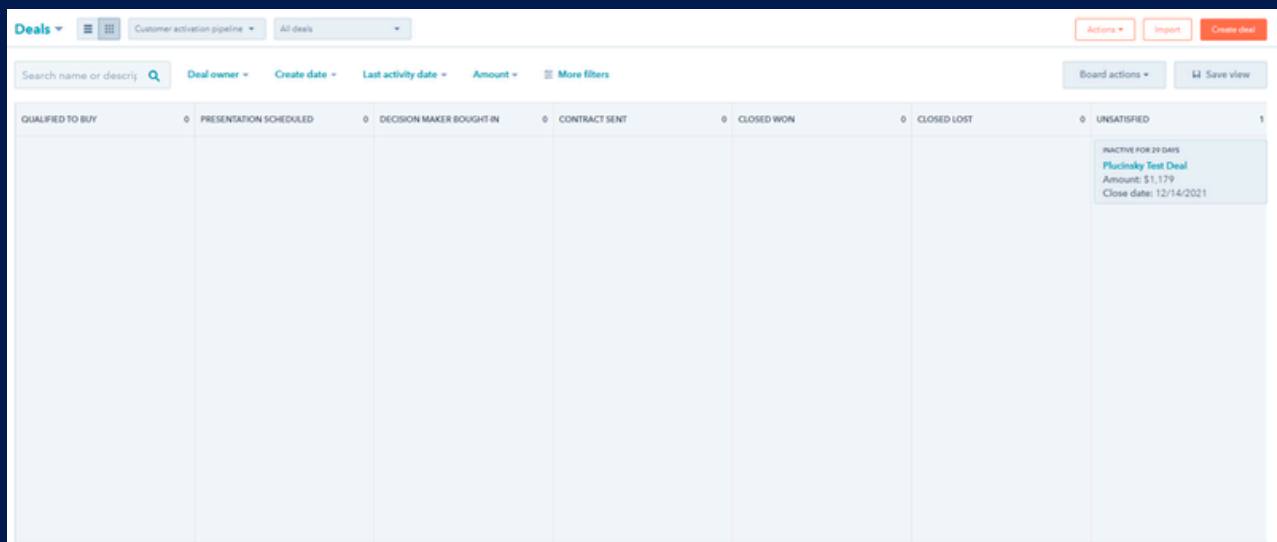
Create Rule

- ☑ CHECK THE BOX TO AUTOMATICALLY CARRY FORWARD PRODUCTS TO THE DUPLICATED DEAL IF THIS LOGIC APPLIES.

# How to Duplicate a Deal Automatically

## Step 5

In order to test the logic that was just created, drag a test Deal to the trigger Pipeline/Stage and check the destination Pipeline/Stage for a duplicated Deal.

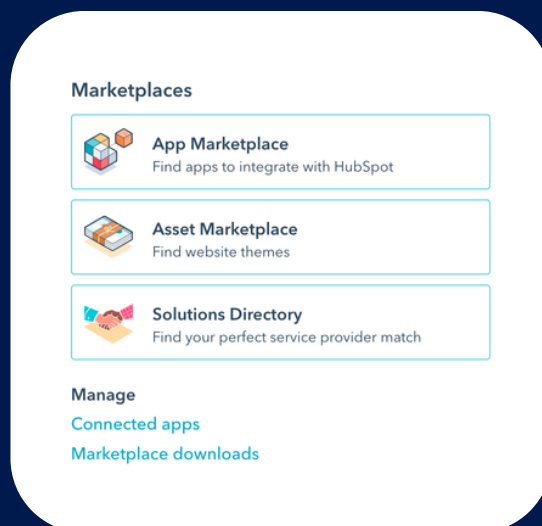


The screenshot displays a CRM interface for managing deals. At the top, there's a header with 'Deals' and a dropdown menu set to 'Customer activation pipeline'. Below this is a search bar and several filter buttons: 'Deal owner', 'Create date', 'Last activity date', 'Amount', and 'More filters'. On the right, there are buttons for 'Actions', 'Import', and 'Create deal'. The main area is a Kanban-style board with columns representing different stages of the deal process: 'QUALIFIED TO BUY', 'PRESENTATION SCHEDULED', 'DECISION MAKER BOUGHT IN', 'CONTRACT SENT', 'CLOSED WON', 'CLOSED LOST', and 'UNSATISFIED'. Each column has a counter at the top. The 'UNSATISFIED' column has a counter of '1'. A deal card is visible in the 'UNSATISFIED' column. The card text reads: 'INACTIVE FOR 29 DAYS', 'Placinsky Test Deal', 'Amount: \$1,179', and 'Close date: 12/14/2021'.

QUALIFIED TO BUY	PRESENTATION SCHEDULED	DECISION MAKER BOUGHT IN	CONTRACT SENT	CLOSED WON	CLOSED LOST	UNSATISFIED
						1

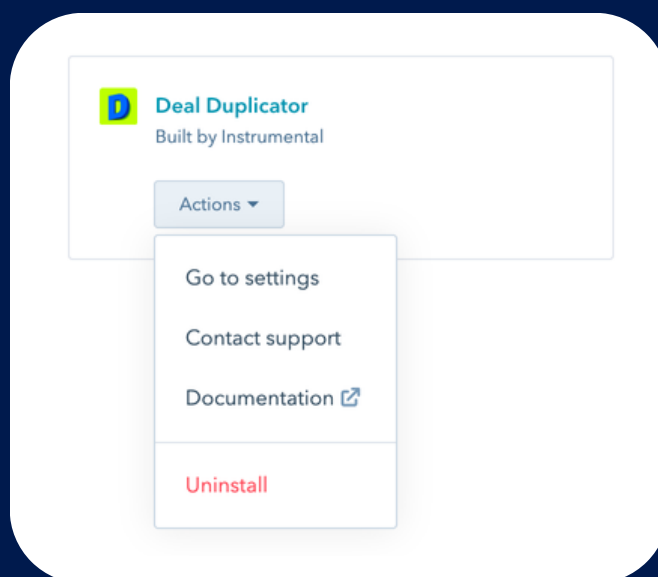
## Step 1

Click on the marketplace icon in the top menu of your portal and click 'Connected Apps'.



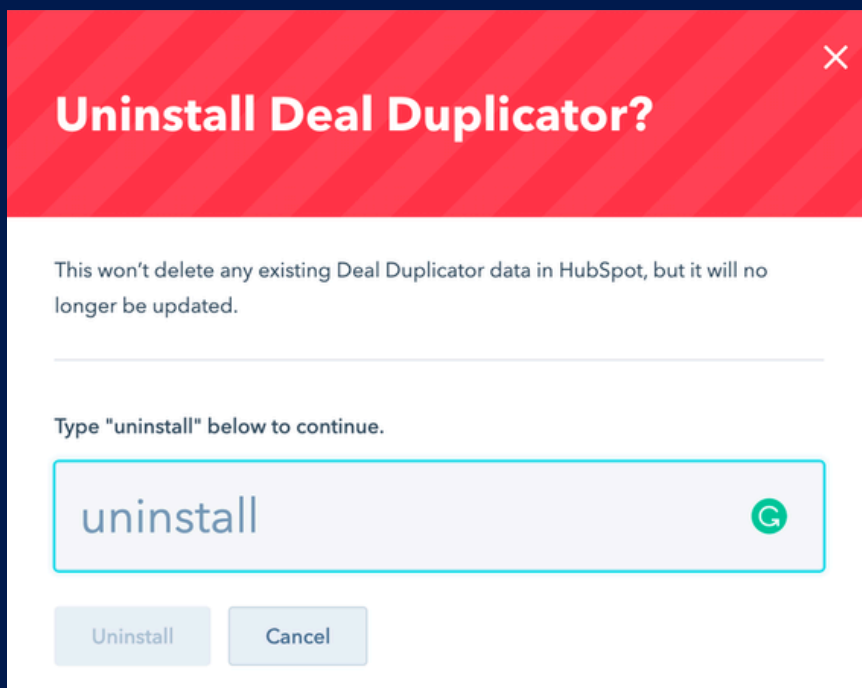
## Step 2

Find the Deal Duplicator app. Click into the 'Actions' dropdown and click the 'Uninstall' option.



## Step 3

Confirm uninstallation by typing "uninstall" in the box as prompted. Click the 'Uninstall' button.

A confirmation dialog box titled "Uninstall Deal Duplicator?" with a red header and a close button (X) in the top right corner. The main content area is white and contains the following text: "This won't delete any existing Deal Duplicator data in HubSpot, but it will no longer be updated." Below this is a horizontal line. Then, it says "Type 'uninstall' below to continue." followed by a text input field containing the word "uninstall" and a green circular icon with a white 'G' on the right. At the bottom, there are two buttons: "Uninstall" and "Cancel".

**Uninstall Deal Duplicator?**

This won't delete any existing Deal Duplicator data in HubSpot, but it will no longer be updated.

Type "uninstall" below to continue.

uninstall

Uninstall Cancel

**Note:** If you have purchased a subscription, uninstalling the app this way will not automatically cancel your paid plan. Please fill out this form to cancel your subscription. We will complete your request within 5 business days. If you have any trouble uninstalling our app, [check this link](#).

# Frequently Asked Questions

## **Q: Is it possible to duplicate deals in HubSpot?**

A: Yes, with Instrumental's Deal Duplicator. Just install the app in minutes and have the app do it for you. The app allows you to duplicate manually, even from one pipeline to another, or you can set rules to have the app do it automatically when a condition is met.

## **Q: Will Deal Duplicator interfere with HubSpot workflows?**

A: Not at all. HubSpot automation is done separately and it will react to our app's automation as if a user had duplicated the deal.

## **Q: What HubSpot property and info fields can be cloned from this widget?**

A: All HubSpot Deal properties and their values will be cloned to the new Deal. However, any custom fields that were created by third-party apps will not be duplicated. Any associations that exist with other objects like Contacts or Companies will also be preserved. Lastly, you have the option to also carry forward any Products associated with the Deal.

## **Q: Will all emails, notes, calls, and activities get cloned too?**

A: Engagements from the original Deal activity timeline are not duplicated to the new Deal.

# Frequently Asked Questions

**Q: Can a cloned Deal appear in different HubSpot pipelines at the same time?**

A: Yes, a cloned Deal can appear in multiple HubSpot pipelines at the same time. There will be no systematic link between these Deals, so they need to be treated as separate objects.

**Q: Will I have access to technical support after installing this widget?**

A: As a customer, you have access to our technical support team should you run into any issues. We'd also love to hear your feedback if there are ways we can improve the app!

**Q: Is it necessary to have Marketing Pro license in order to install Deal Duplicator?**

A: No, Marketing Pro is not required to take advantage of the benefits of this widget.

**Q: How many associated objects can I have on a Deal that I want to duplicate?**

A: Deal Duplicator can clone a Deal with up to 100 associated Contacts, Companies, Tickets, and Line Items. This limit is per object type.

