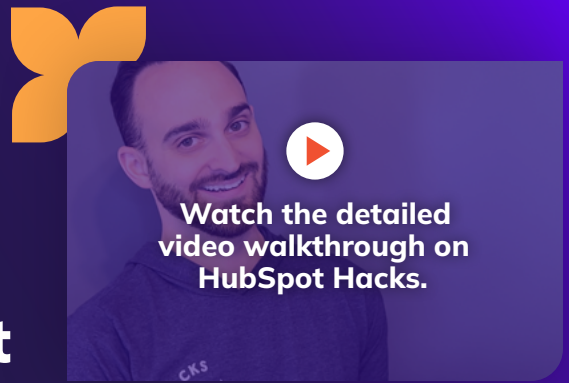


# Update Deal Stage to Closed Won After e-sign or Payment



## You will need:

- To be using HubSpot quotes or invoices

## Trigger

**Type:** Deal

### Conditions:

- Quote e-signed date is known
- Quote payment date is known
- Invoice payment date is known

## Tip:



These are associated options you need to select from the drop-down: Add Criteria > Filtering on: Deal (Current Object) > Quote

**Type:** Branch

**Options:** And/Or Criteria

If you have multiple pipelines, branch on those pipelines

Pipeline A

Pipeline B

None Met (for tracking errors)

**Type:** Edit Record

Update deal stage to correct stage

**Type:** Edit Record

Update deal stage to correct stage

**Send email to HubSpot admin(s) to alert of errors**

## Tip:



Use "go to action" to go from one branch into another.

**Type:** Internal communications

Send internal emails, slacks, or team messages to celebrate the win

## Tip:



Use personalization tokens to insert:

- Contact owner
- Company name
- Contact info like email and phone