Guide - How to interact with your Deals
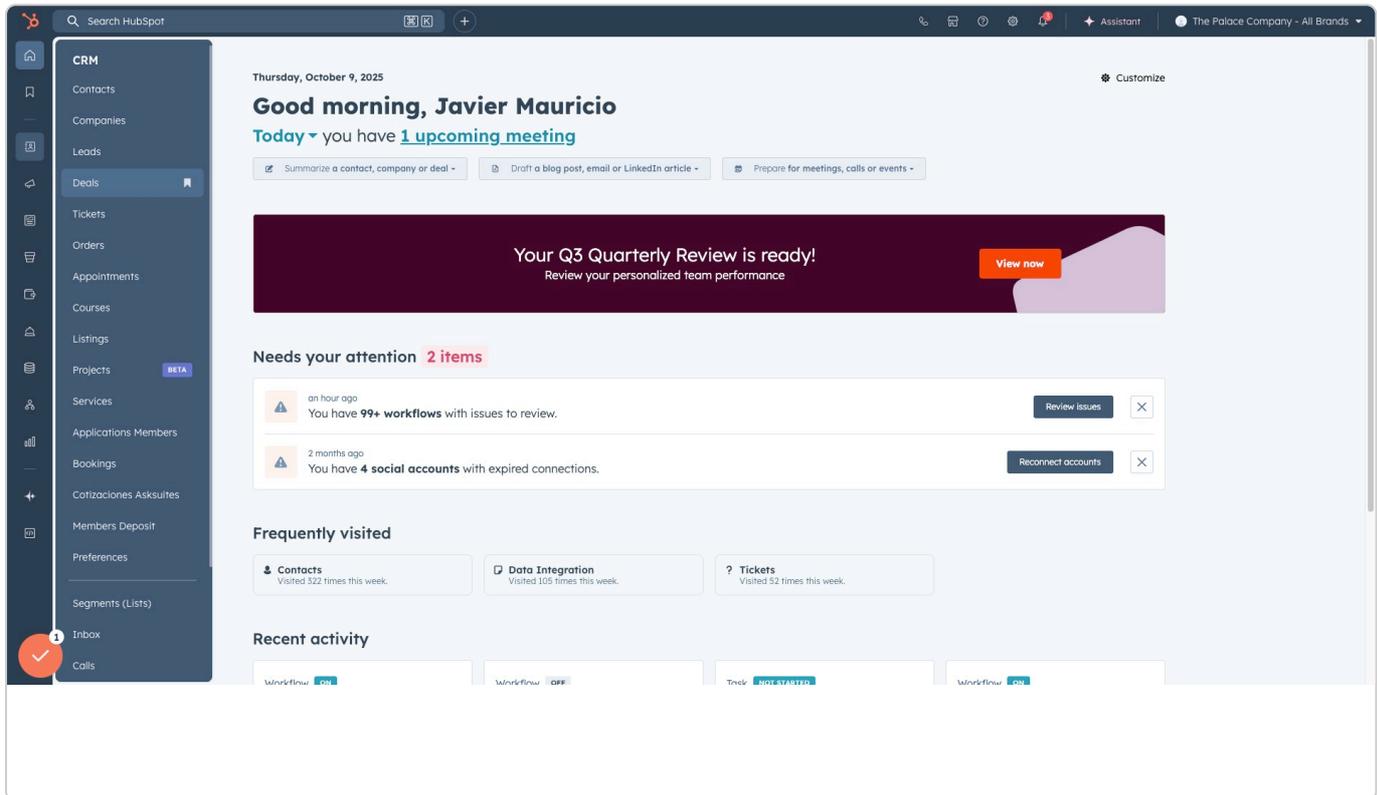
Última actualización: 9 de oct. de 2025

1 **Navigate to Global Home | HubSpot**
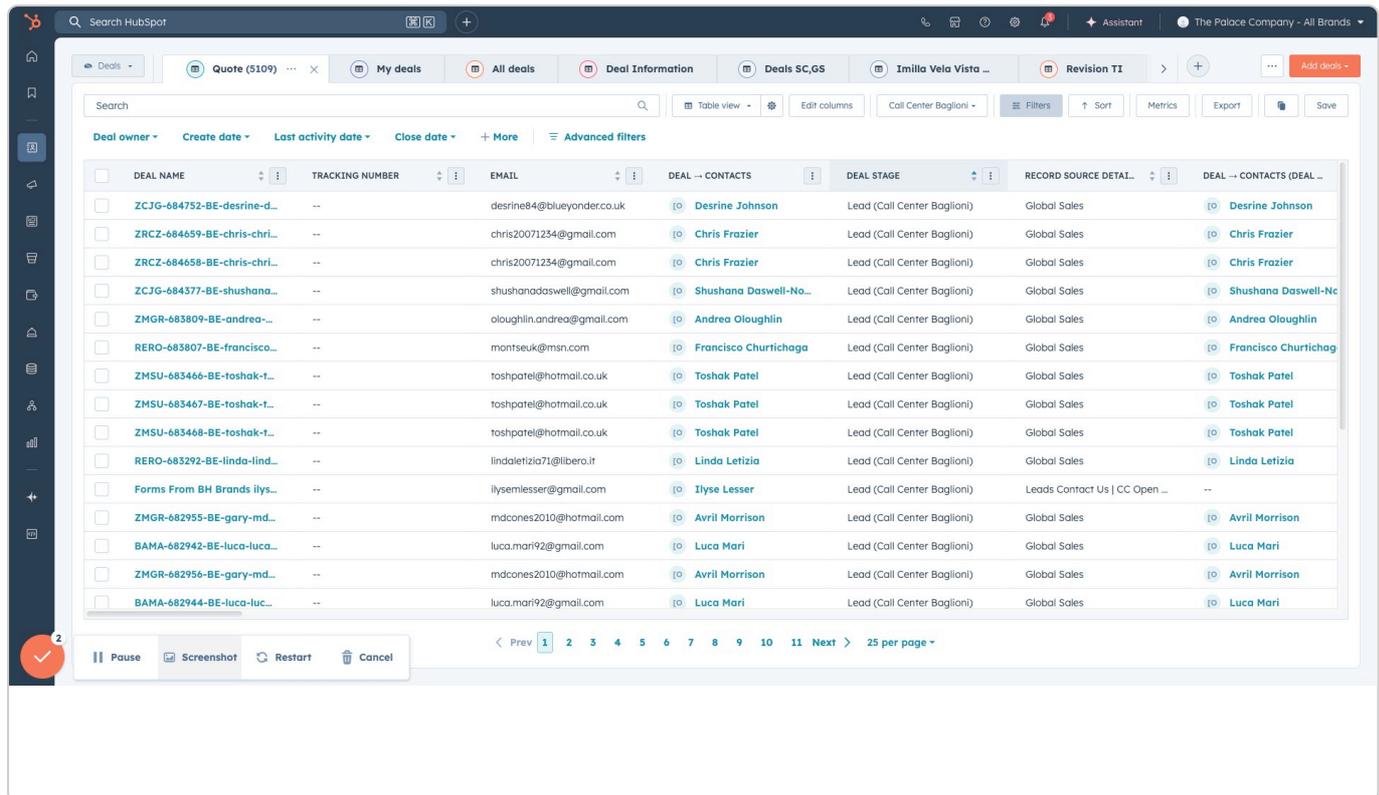
2 **Click on Deals**

3 View All Deals

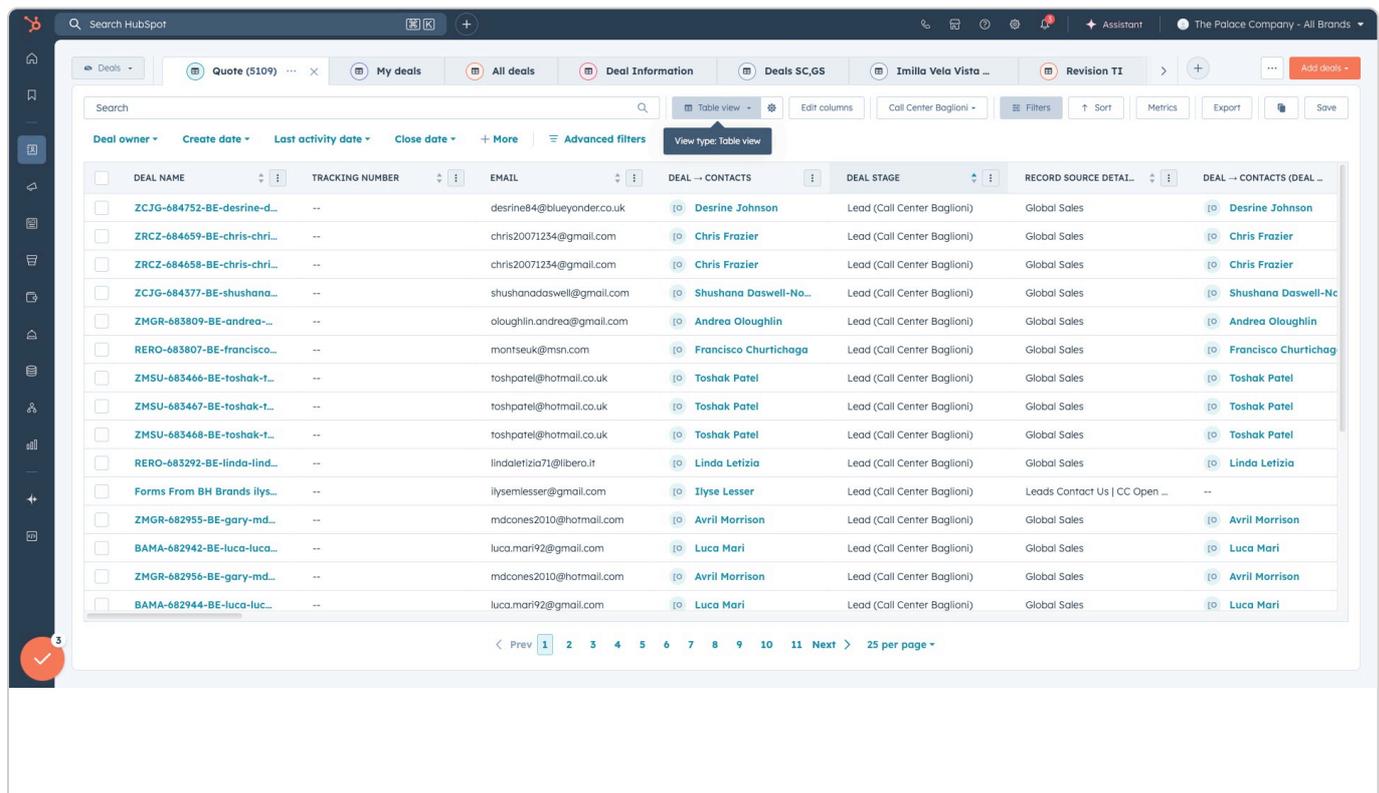Hubspot automatically identifies your team an show you only the deal pipelines that you have access

4 Click on highlighted area

From this button you can choose from a variety of view types to see your deals (Table view, board view, calendar view, report view)

5 Click on desire view type

For example purposes we select "Board View"

6 Click on highlighted deal

From this "Board view" you can see how many deals you have in each stage so you can take proper action to each one

7 View from the selected Deal

From this view you can see three differents sections: 1.- The left section give you all the information about the deal. 2.- The middle section show you an overview of the deal and all the activities related(e-mails,sms,calls,meetings). 3.- The right section give you the associations between the deal and other objects(contacts,tickets,companies(travel agencies), other deals).

8 Click on Create a Note

Used to record important information, meeting summaries, or details about interactions with a contact for internal reference and team collaboration.

Click on Create an email

Sent directly to contacts from the CRM to communicate updates, share information, or move deals forward, while keeping a record of the conversation thread.

Click on Task

Reminders or to-do items created for yourself or teammates to ensure follow-up actions are completed on time, such as following up with a contact or sending a document.
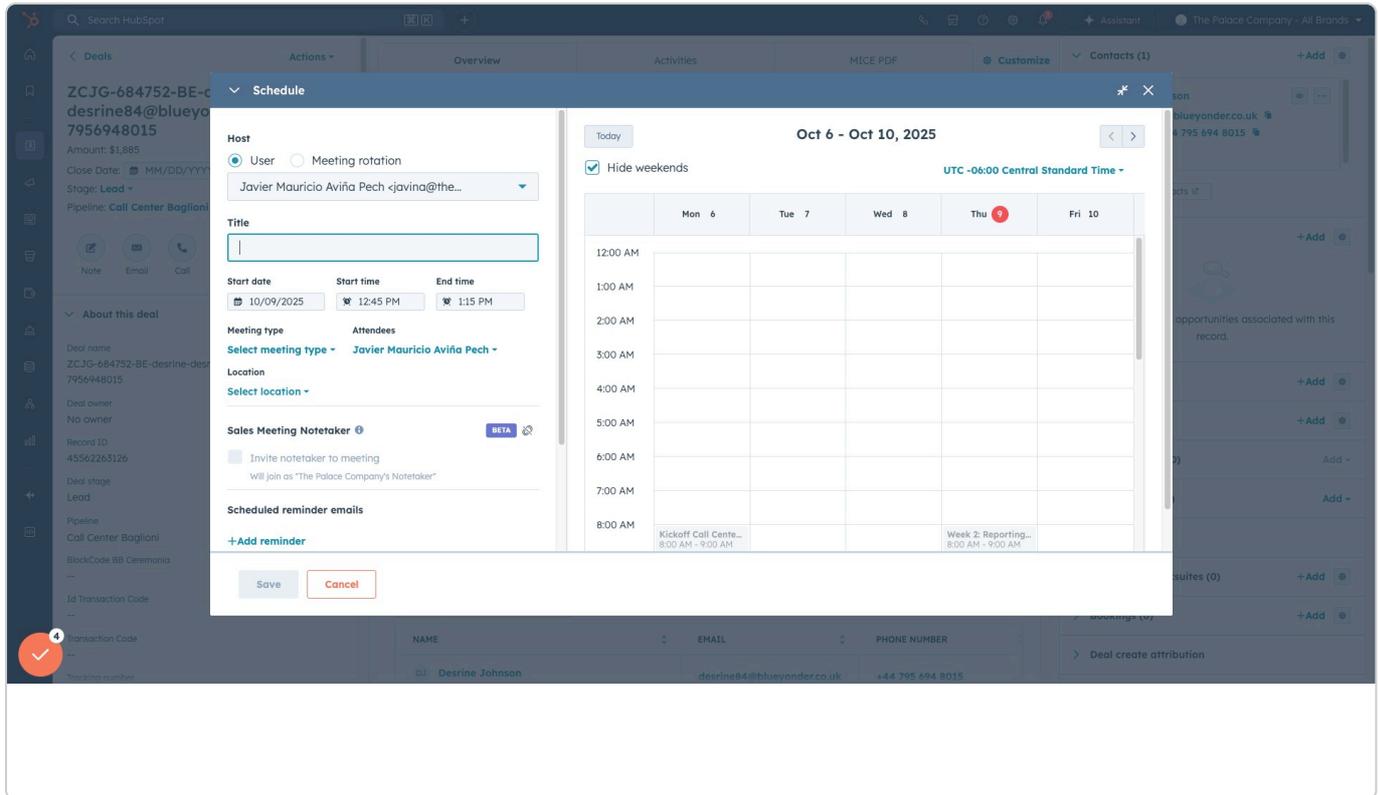
Click on Meetings

Scheduled calendar events with contacts to discuss opportunities, answer questions, or present solutions, helping to build relationships and move deals forward.

Click on call
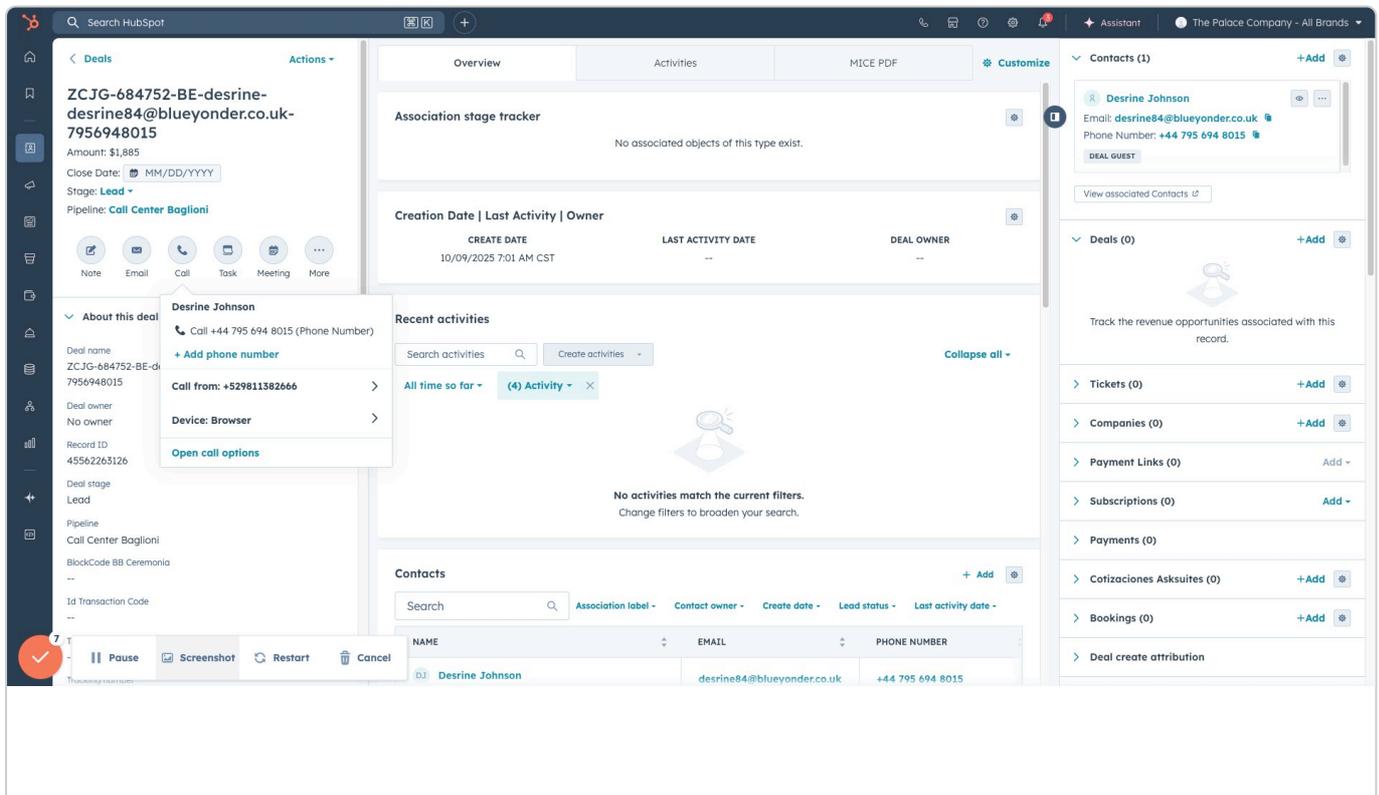
13. Click on More

To toggle on the additional actions for a Deal, for this case we're going to use the option "Enroll in a sequence"

14. Click on Contact

Enroll Contact into a Sales Sequence, automates follow-up emails and task reminders for contacts, ensuring consistent and timely outreach to increase engagement and conversion rates.

Click on sequence name to use

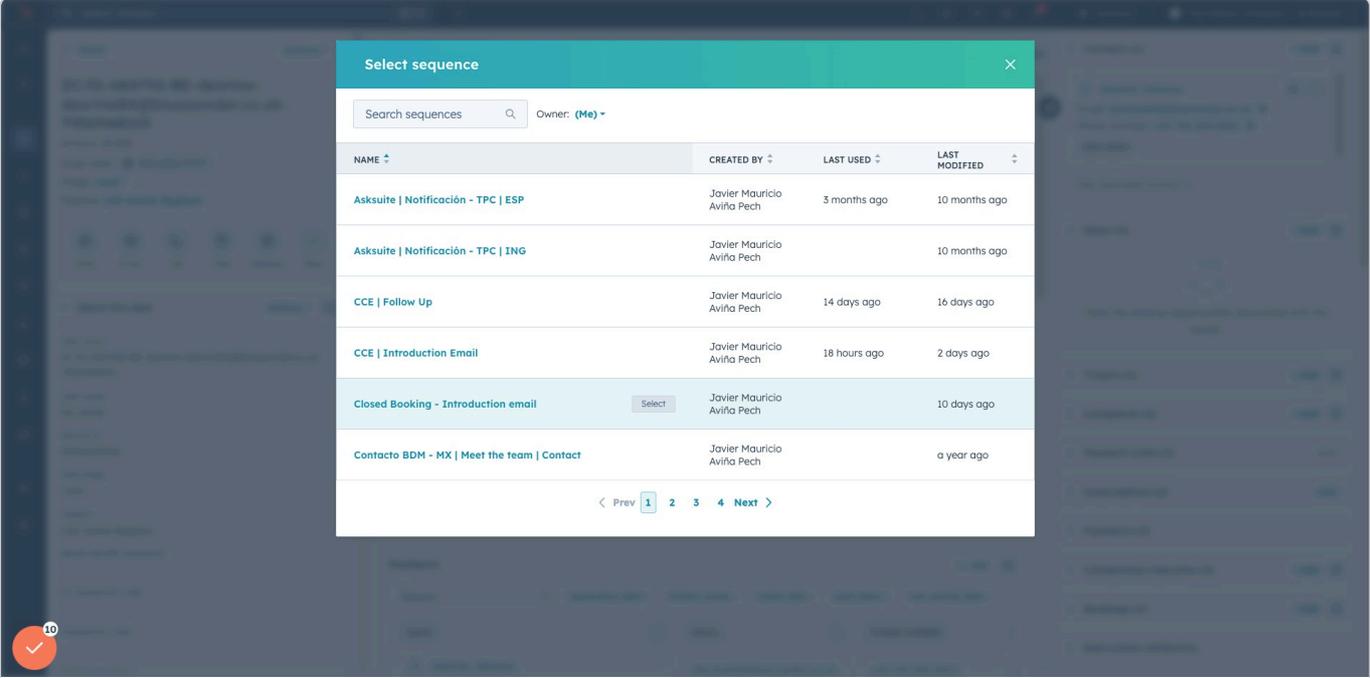| NAME	CREATED BY	LAST USED	LAST MODIFIED
Asksuite | Notificación - TPC | ESP	Javier Mauricio Aviña Pech	3 months ago	10 months ago
Asksuite | Notificación - TPC | ING	Javier Mauricio Aviña Pech		10 months ago
CCE | Follow Up	Javier Mauricio Aviña Pech	14 days ago	16 days ago
CCE | Introduction Email	Javier Mauricio Aviña Pech	18 hours ago	2 days ago
Closed Booking - Introduction email Select	Javier Mauricio Aviña Pech		10 days ago
Contacto BDM - MX | Meet the team | Contact	Javier Mauricio Aviña Pech		a year ago

Select sequence

Search sequences   Owner: (Me) ▾

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