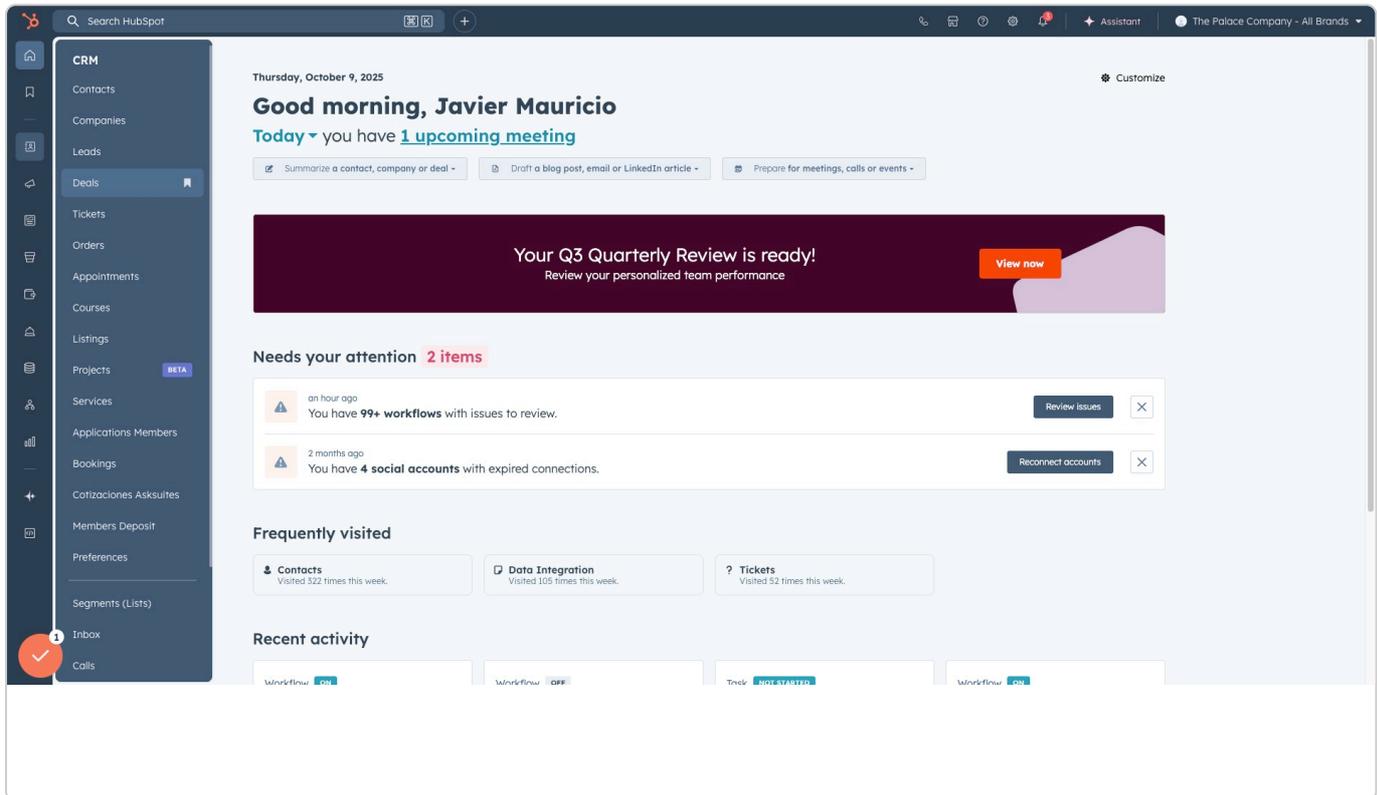


Guide - How to interact with your Deals

Última actualización: 9 de oct. de 2025

1 Navigate to Global Home | HubSpot

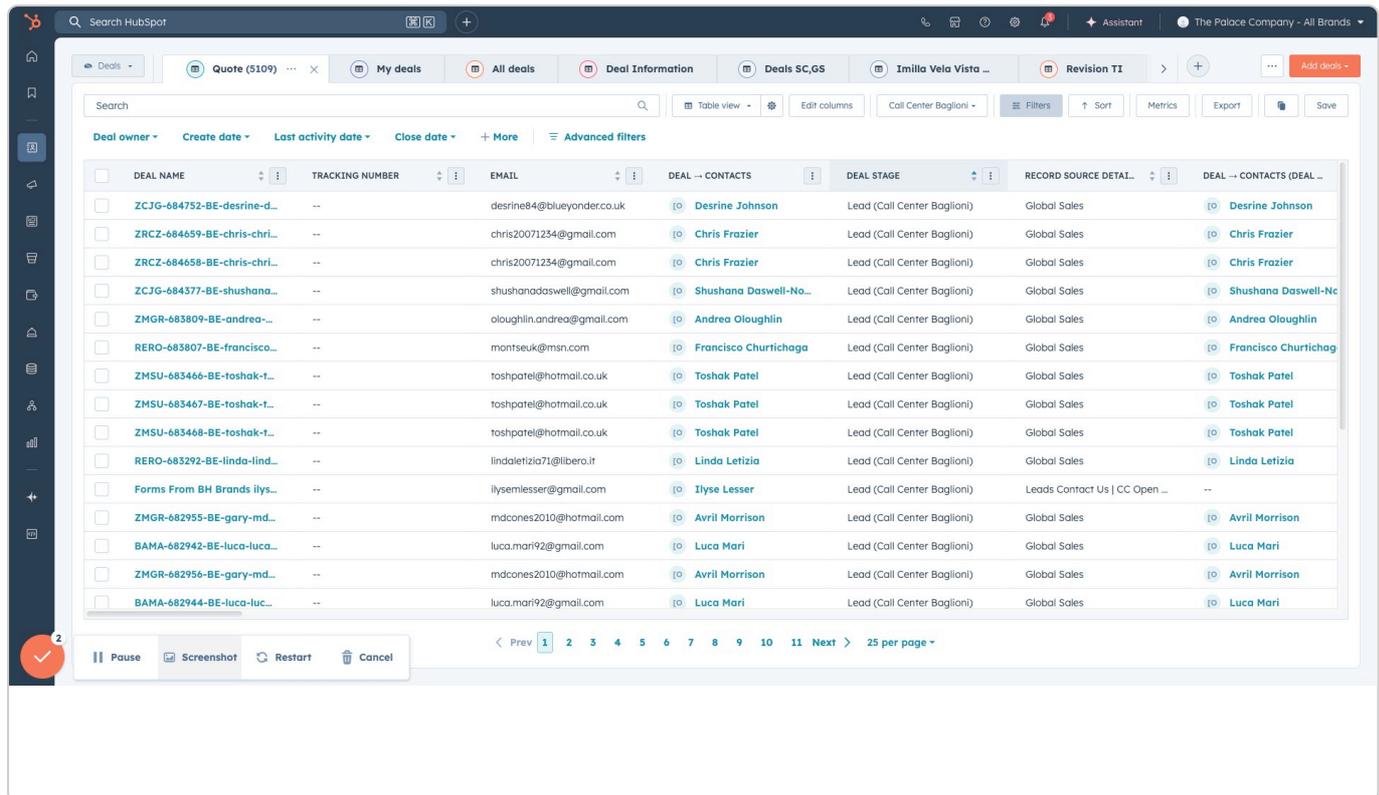
2 Click on Deals



3

View All Deals

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



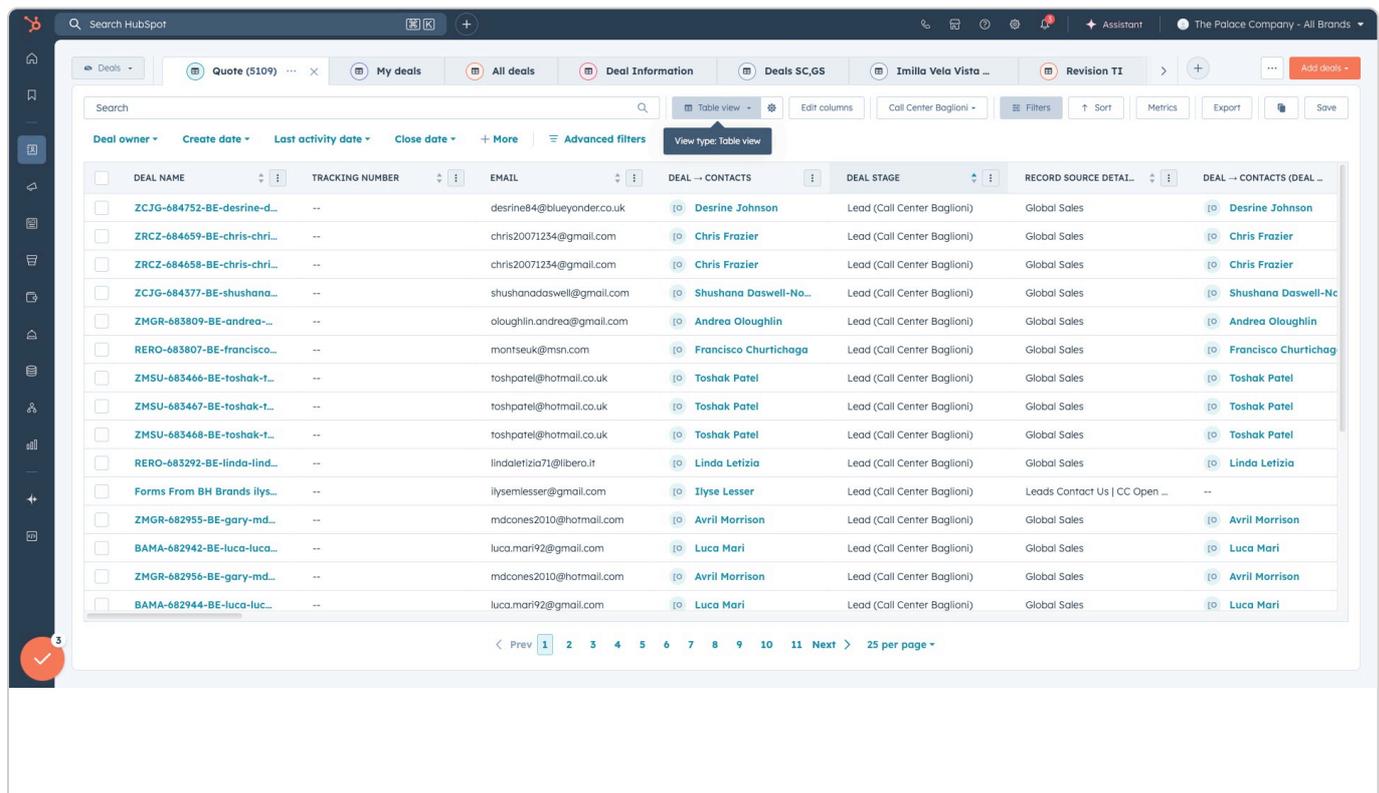
The screenshot shows the HubSpot interface for viewing deals. At the top, there are navigation tabs for 'Deals', 'Quote (5109)', 'My deals', 'All deals', 'Deal Information', 'Deals SC,GS', 'Imilla Vela Vista ...', and 'Revision TI'. Below the navigation is a search bar and a table view selector. The main area displays a list of deals with columns for Deal Name, Tracking Number, Email, Deal -> Contacts, Deal Stage, Record Source Detail, and Deal -> Contacts (Deal ...). A red circle with the number 2 highlights the 'View type' dropdown menu at the bottom of the table, which is currently set to 'Table view'.

Deal owner	Create date	Last activity date	Close date	More	Advanced filters		
<input type="checkbox"/>	ZCJG-684752-BE-desrine-d...	--	desrine84@blueyonder.co.uk	Desrine Johnson	Lead (Call Center Baglioni)	Global Sales	Desrine Johnson
<input type="checkbox"/>	ZRCZ-684659-BE-chris-chri...	--	chris20071234@gmail.com	Chris Frazier	Lead (Call Center Baglioni)	Global Sales	Chris Frazier
<input type="checkbox"/>	ZRCZ-684658-BE-chris-chri...	--	chris20071234@gmail.com	Chris Frazier	Lead (Call Center Baglioni)	Global Sales	Chris Frazier
<input type="checkbox"/>	ZCJG-684377-BE-shushana...	--	shushanadaswell@gmail.com	Shushana Daswell-No...	Lead (Call Center Baglioni)	Global Sales	Shushana Daswell-Nc
<input type="checkbox"/>	ZMGR-683809-BE-andrea...	--	oloughlin.andrea@gmail.com	Andrea Oloughlin	Lead (Call Center Baglioni)	Global Sales	Andrea Oloughlin
<input type="checkbox"/>	RERO-683807-BE-francisco...	--	montseuk@msn.com	Francisco Churtichaga	Lead (Call Center Baglioni)	Global Sales	Francisco Churtichag
<input type="checkbox"/>	ZMSU-683466-BE-toshak-t...	--	toshpatel@hotmail.co.uk	Toshak Patel	Lead (Call Center Baglioni)	Global Sales	Toshak Patel
<input type="checkbox"/>	ZMSU-683467-BE-toshak-t...	--	toshpatel@hotmail.co.uk	Toshak Patel	Lead (Call Center Baglioni)	Global Sales	Toshak Patel
<input type="checkbox"/>	ZMSU-683468-BE-toshak-t...	--	toshpatel@hotmail.co.uk	Toshak Patel	Lead (Call Center Baglioni)	Global Sales	Toshak Patel
<input type="checkbox"/>	RERO-683292-BE-linda-lind...	--	lindaletizia71@libero.it	Linda Letizia	Lead (Call Center Baglioni)	Global Sales	Linda Letizia
<input type="checkbox"/>	Forms From BH Brands ilys...	--	ilysemless@gmail.com	Ilyse Lesser	Lead (Call Center Baglioni)	Leads Contact Us CC Open ...	--
<input type="checkbox"/>	ZMGR-682955-BE-gary-md...	--	mdcones2010@hotmail.com	Avril Morrison	Lead (Call Center Baglioni)	Global Sales	Avril Morrison
<input type="checkbox"/>	BAMA-682942-BE-luca-luca...	--	luca.mari92@gmail.com	Luca Mari	Lead (Call Center Baglioni)	Global Sales	Luca Mari
<input type="checkbox"/>	ZMGR-682956-BE-gary-md...	--	mdcones2010@hotmail.com	Avril Morrison	Lead (Call Center Baglioni)	Global Sales	Avril Morrison
<input type="checkbox"/>	BAMA-682944-BE-luca-luc...	--	luca.mari92@gmail.com	Luca Mari	Lead (Call Center Baglioni)	Global Sales	Luca Mari

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)



The screenshot shows the HubSpot interface for viewing deals, identical to the previous one. A red circle with the number 3 highlights the 'View type' dropdown menu at the bottom of the table, which is now set to 'Table view'.

Deal owner	Create date	Last activity date	Close date	More	Advanced filters		
<input type="checkbox"/>	ZCJG-684752-BE-desrine-d...	--	desrine84@blueyonder.co.uk	Desrine Johnson	Lead (Call Center Baglioni)	Global Sales	Desrine Johnson
<input type="checkbox"/>	ZRCZ-684659-BE-chris-chri...	--	chris20071234@gmail.com	Chris Frazier	Lead (Call Center Baglioni)	Global Sales	Chris Frazier
<input type="checkbox"/>	ZRCZ-684658-BE-chris-chri...	--	chris20071234@gmail.com	Chris Frazier	Lead (Call Center Baglioni)	Global Sales	Chris Frazier
<input type="checkbox"/>	ZCJG-684377-BE-shushana...	--	shushanadaswell@gmail.com	Shushana Daswell-No...	Lead (Call Center Baglioni)	Global Sales	Shushana Daswell-Nc
<input type="checkbox"/>	ZMGR-683809-BE-andrea...	--	oloughlin.andrea@gmail.com	Andrea Oloughlin	Lead (Call Center Baglioni)	Global Sales	Andrea Oloughlin
<input type="checkbox"/>	RERO-683807-BE-francisco...	--	montseuk@msn.com	Francisco Churtichaga	Lead (Call Center Baglioni)	Global Sales	Francisco Churtichag
<input type="checkbox"/>	ZMSU-683466-BE-toshak-t...	--	toshpatel@hotmail.co.uk	Toshak Patel	Lead (Call Center Baglioni)	Global Sales	Toshak Patel
<input type="checkbox"/>	ZMSU-683467-BE-toshak-t...	--	toshpatel@hotmail.co.uk	Toshak Patel	Lead (Call Center Baglioni)	Global Sales	Toshak Patel
<input type="checkbox"/>	ZMSU-683468-BE-toshak-t...	--	toshpatel@hotmail.co.uk	Toshak Patel	Lead (Call Center Baglioni)	Global Sales	Toshak Patel
<input type="checkbox"/>	RERO-683292-BE-linda-lind...	--	lindaletizia71@libero.it	Linda Letizia	Lead (Call Center Baglioni)	Global Sales	Linda Letizia
<input type="checkbox"/>	Forms From BH Brands ilys...	--	ilysemless@gmail.com	Ilyse Lesser	Lead (Call Center Baglioni)	Leads Contact Us CC Open ...	--
<input type="checkbox"/>	ZMGR-682955-BE-gary-md...	--	mdcones2010@hotmail.com	Avril Morrison	Lead (Call Center Baglioni)	Global Sales	Avril Morrison
<input type="checkbox"/>	BAMA-682942-BE-luca-luca...	--	luca.mari92@gmail.com	Luca Mari	Lead (Call Center Baglioni)	Global Sales	Luca Mari
<input type="checkbox"/>	ZMGR-682956-BE-gary-md...	--	mdcones2010@hotmail.com	Avril Morrison	Lead (Call Center Baglioni)	Global Sales	Avril Morrison
<input type="checkbox"/>	BAMA-682944-BE-luca-luc...	--	luca.mari92@gmail.com	Luca Mari	Lead (Call Center Baglioni)	Global Sales	Luca Mari

5

Click on desire view type

For example purposes we select "Board View"

The screenshot shows the HubSpot CRM interface with the 'My deals' view selected. A 'View type' dropdown menu is open, showing options for 'Table view', 'Board view', 'Report view', and 'Calendar view'. The 'Board view' option is highlighted. Below the menu, a table of deals is visible, including columns for Deal owner, Create date, Last activity date, Close date, Deal name, Tracking number, Email, and Deal status.

Deal owner	Create date	Last activity date	Close date	Deal name	Tracking number	Email	Deal status
				ZCJG-684752-BE-desrine-d...		desrine84@blueyonder.co.uk	Desrine Johnson
				ZRCZ-684658-BE-chris-chri...		chris20071234@gmail.com	Chris Frazier
				ZRCZ-684658-BE-chris-chri...		chris20071234@gmail.com	Chris Frazier
				ZCJG-684377-BE-shushana...		shushanadaswell@gmail.com	Shushana Daswell-No...
				ZMGR-683809-BE-andrea...		oloughlin.andrea@gmail.com	Andrea Oloughlin
				RERO-683807-BE-francisco...		montseuk@msn.com	Francisco Churtichaga
				ZMSU-683466-BE-toshak-t...		toshpatel@hotmail.co.uk	Toshak Patel
				ZMSU-683467-BE-toshak-t...		toshpatel@hotmail.co.uk	Toshak Patel
				ZMSU-683468-BE-toshak-t...		toshpatel@hotmail.co.uk	Toshak Patel
				RERO-683292-BE-linda-lind...		lindaletizia71@libero.it	Linda Letizia
				Forms From BH Brands ilys...		ilysemless@gmail.com	Ilyse Lesser
				ZMGR-682955-BE-gary-md...		mdcones2010@hotmail.com	Avril Morrison
				BAMA-682942-BE-luca-luca...		luca.mari92@gmail.com	Luca Mari
				ZMGR-682956-BE-gary-md...		mdcones2010@hotmail.com	Avril Morrison
				BAMA-682944-BE-luca-luca...		luca.mari92@gmail.com	Luca Mari

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

The screenshot shows the HubSpot CRM interface with the 'My deals' view selected in 'Board view' mode. The deals are organized into columns representing different stages: In Process (13), Quote (0), Waiting for Approval (0), Waiting for Payment (1), and Won (2). Each deal card shows details like deal name, amount, close date, and deal owner.

Stage	Deal Name	Amount	Close Date	Deal Owner
In Process 13	ZCJG-684752-BE-desrine-d...	\$1,885	10/09/2025	Desrine Johnson
	ZRCZ-684659-BE-chris-chri...	\$4,856	10/08/2025	Chris Frazier
	ZRCZ-684658-BE-chris-chri...	\$4,856	10/08/2025	Chris Frazier
	ZCJG-684377-BE-shushana...	\$1,068		
Quote 0	Forms From BH Brands Lisa			Melissa MORSCHER
	RERO-683497-BE-cesare-cesare@sprefico.net...	\$2,995	10/06/2025	Antonio Fiore
	BAMA-682202-BE-fabiënne-xkramer@hotmail.nl...	\$96,485	10/03/2025	Luca Grisso
Waiting for Approval 0				
Waiting for Payment 1	Courtesy Hold Casa Baglioni Milan n. pty 10589741- May...	\$16,448	09/30/2025	Taina Dessi
Won 2	LUVE-679617-BE-frank-frank@annuscheit.de...	\$2,358	09/30/2025	Antonio Fiore
	boda italiana dos test	\$35,200	07/01/2025	Victor Lopez

View from the selected Deal

From this view you can see three different 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).

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.

9

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.

The screenshot displays the HubSpot CRM interface for a deal. The deal name is "ZCJG-684752-BE-desrine-desrine84@blueyonder.co.uk-7956948015". The amount is \$1,885, and the stage is "Lead". The pipeline is "Call Center Baglioni". The deal owner is "No owner". The deal stage is "Lead". The pipeline is "Call Center Baglioni". The deal stage is "Lead". The pipeline is "Call Center Baglioni".

The "Recent activities" section shows 4 activities. The "Contacts" section shows a table with one contact: Desrine Johnson, email desrine84@blueyonder.co.uk, and phone number +44 795 694 8015.

The "Email" modal is open, showing the "To" field with "Desrine Johnson" selected. The "From" field is "Javier Mauricio Avifa Pech (javina@thepalacecompany.com)". The "Subject" field is "HERE YOU CAN INSERT THE EMAIL TEXT OR YOU CAN USE THE TEMPLATES YOU MADE BEFORE, INSERT DOCUMENTS, SCHEDULE MEETINGS". The "Send" button is visible.

10

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.

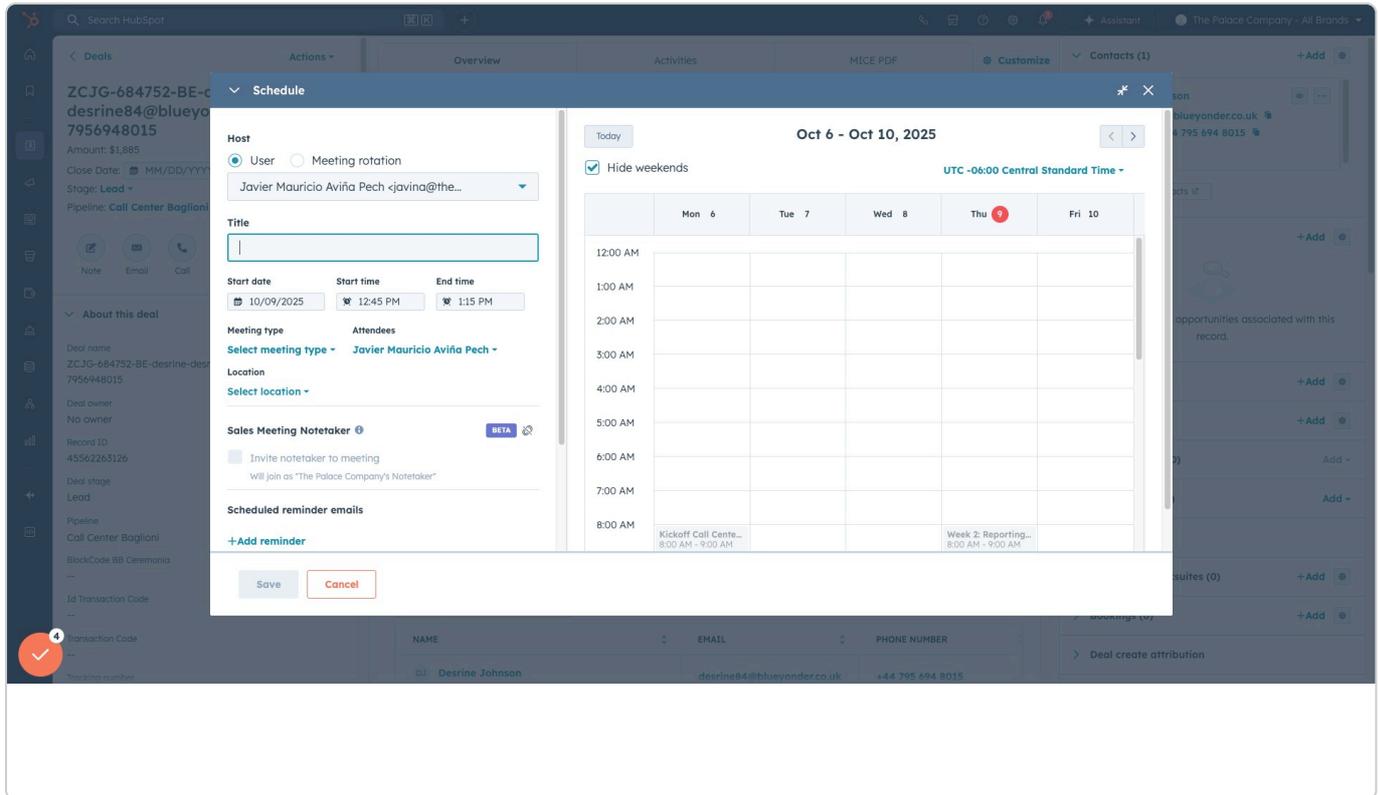
The screenshot displays the HubSpot CRM interface for a deal. The deal name is "ZCJG-684752-BE-desrine-desrine84@blueyonder.co.uk-7956948015". The amount is \$1,885, and the stage is "Lead". The pipeline is "Call Center Baglioni". The deal owner is "No owner". The deal stage is "Lead". The pipeline is "Call Center Baglioni".

The "Recent activities" section shows 4 activities. The "Contacts" section shows a table with one contact: Desrine Johnson, email desrine84@blueyonder.co.uk, and phone number +44 795 694 8015.

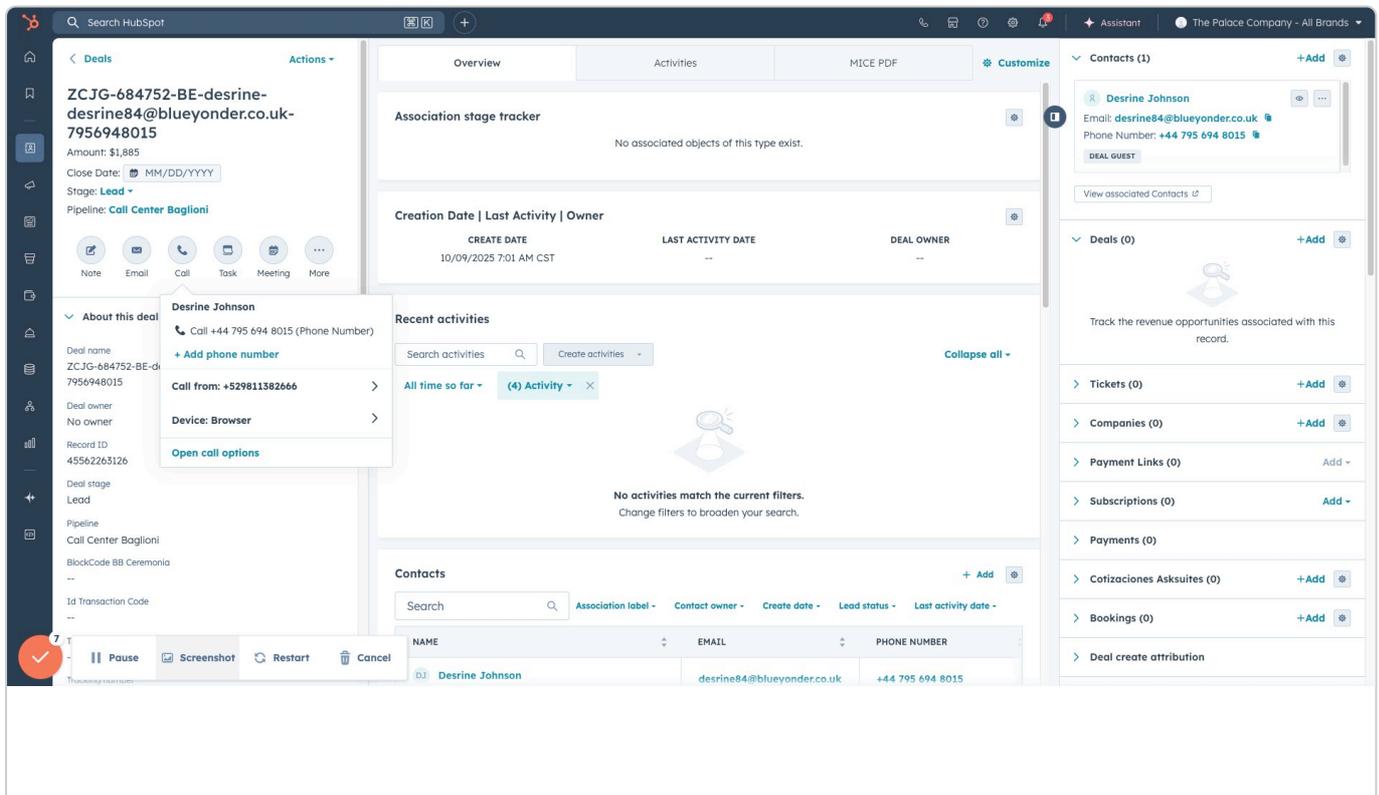
The "Task" modal is open, showing the "Enter your task" field. The "Activity date" is "In 3 business days (Tuesday)" at 8:00 AM. The "Send reminder" is "No reminder". The "Task Type" is "To-do", "Priority" is "None", and "Queue" is "None". The "Activity assigned to" is "Javier Mauricio Avifa Pech". The "Notes" field is empty.

11 Click on Meetings

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



12 Click on call



13 Click on More

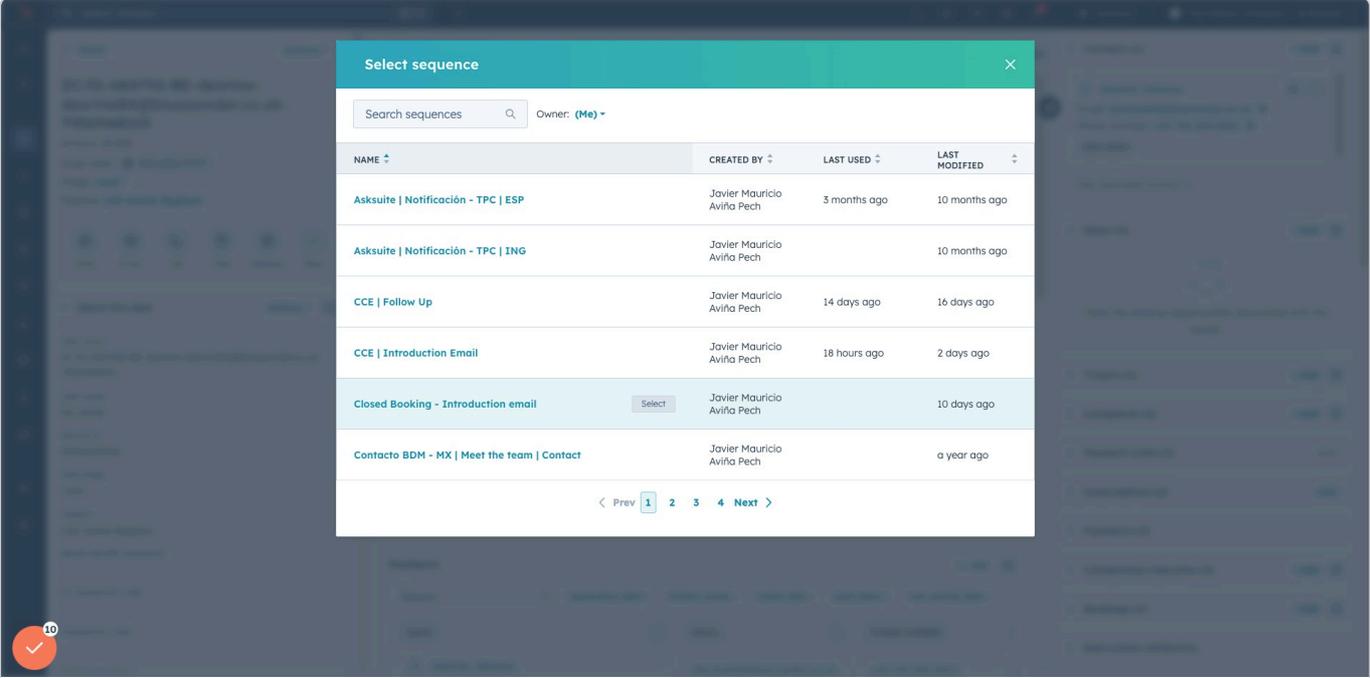
To toggle on the additional actions for a Deal, for this case we're going to use the option "Enroll in a sequence"

The screenshot shows the HubSpot CRM interface for a deal. The deal name is "ZCJG-684752-BE-desrine-desrine84@blueyonder.co.uk-7956948015". The amount is \$1,885, and the stage is "Lead". The pipeline is "Call Center Baglioni". The "More" menu is open, showing options like "Enroll in a sequence", "Log SMS", "Log a LinkedIn message", "Log a WhatsApp message", "Log a call", and "Log a meeting". The "Enroll in a sequence" option is highlighted. The "Activities" tab is selected, showing a table with columns "CREATE DATE", "LAST ACTIVITY DATE", and "DEAL OWNER". The table contains one row with the date "10/09/2025 7:01 AM CST". The "Contacts" tab is also visible, showing a table with columns "NAME", "EMAIL", and "PHONE NUMBER". The table contains one row for "Desrine Johnson" with email "desrine84@blueyonder.co.uk" and phone number "+44 795 694 8015".

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.

The screenshot shows the HubSpot CRM interface for a contact. The contact name is "Desrine Johnson" with email "desrine84@blueyonder.co.uk" and phone number "+44 795 694 8015". The "Enroll in a sequence" option is highlighted in the "More" menu. The "Activities" tab is selected, showing a table with columns "CREATE DATE", "LAST ACTIVITY DATE", and "DEAL OWNER". The table contains one row with the date "10/09/2025 7:01 AM CST". The "Contacts" tab is also visible, showing a table with columns "NAME", "EMAIL", and "PHONE NUMBER". The table contains one row for "Desrine Johnson" with email "desrine84@blueyonder.co.uk" and phone number "+44 795 694 8015".



Select sequence ✕

Search sequences Owner: (Me) ▼

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

< Prev **1** 2 3 4 Next >

10 ✓