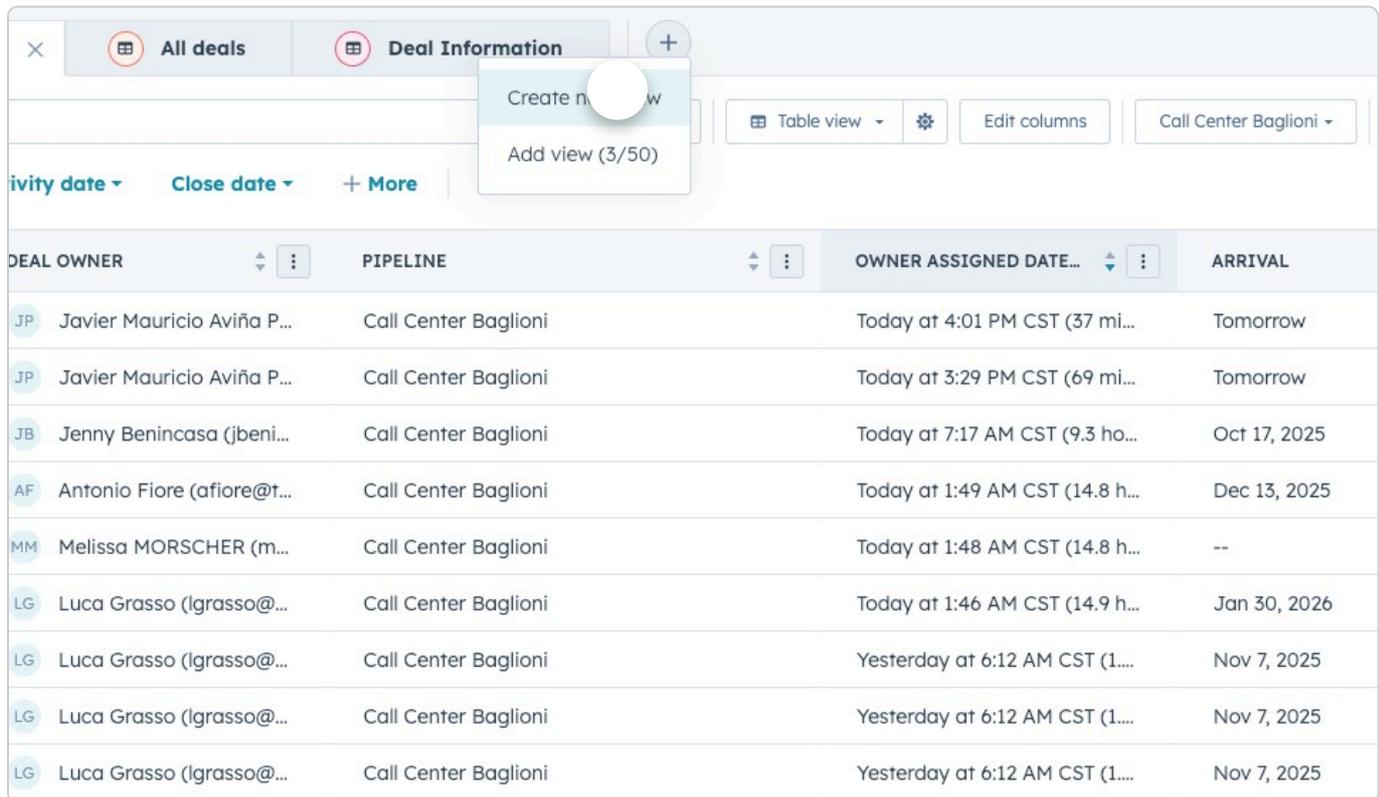


Guide how to create a custom view

Última actualización: 9 de oct. de 2025

1 Navigate to Deals | My deals

2 Click on highlighted area



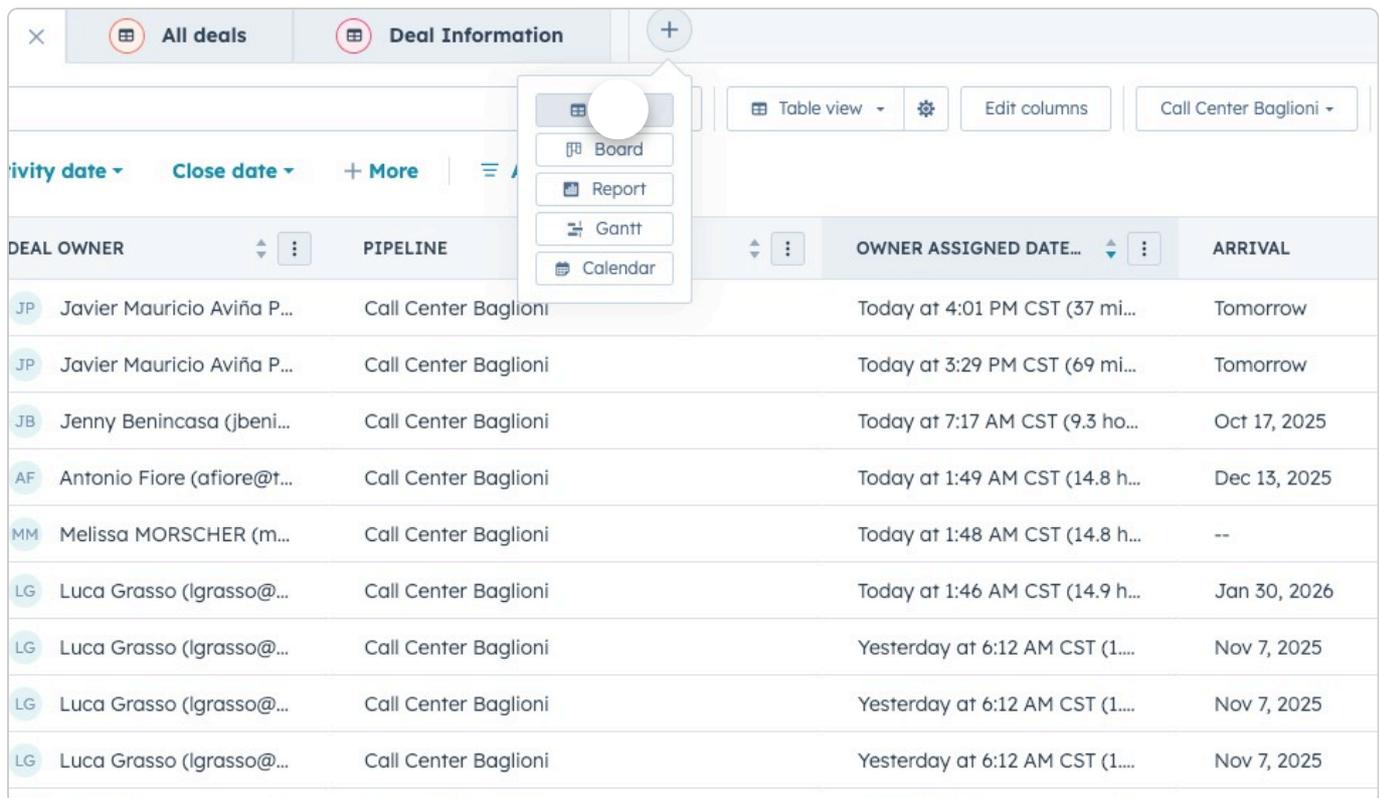
The screenshot shows a CRM interface with a table of deals. The 'Deal Information' tab is selected, and a dropdown menu is open over it, highlighting the 'Create new view' option. The table has columns for DEAL OWNER, PIPELINE, OWNER ASSIGNED DATE..., and ARRIVAL. The data in the table is as follows:

DEAL OWNER	PIPELINE	OWNER ASSIGNED DATE...	ARRIVAL
JP Javier Mauricio Aviña P...	Call Center Baglioni	Today at 4:01 PM CST (37 mi...	Tomorrow
JP Javier Mauricio Aviña P...	Call Center Baglioni	Today at 3:29 PM CST (69 mi...	Tomorrow
JB Jenny Benincasa (jbeni...	Call Center Baglioni	Today at 7:17 AM CST (9.3 ho...	Oct 17, 2025
AF Antonio Fiore (afiore@t...	Call Center Baglioni	Today at 1:49 AM CST (14.8 h...	Dec 13, 2025
MM Melissa MORSCHER (m...	Call Center Baglioni	Today at 1:48 AM CST (14.8 h...	--
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Today at 1:46 AM CST (14.9 h...	Jan 30, 2026
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Yesterday at 6:12 AM CST (1...	Nov 7, 2025
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Yesterday at 6:12 AM CST (1...	Nov 7, 2025
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Yesterday at 6:12 AM CST (1...	Nov 7, 2025

3

Click on view type

You can choose from the following options: Table, Board, Report, Gantt or Calendar



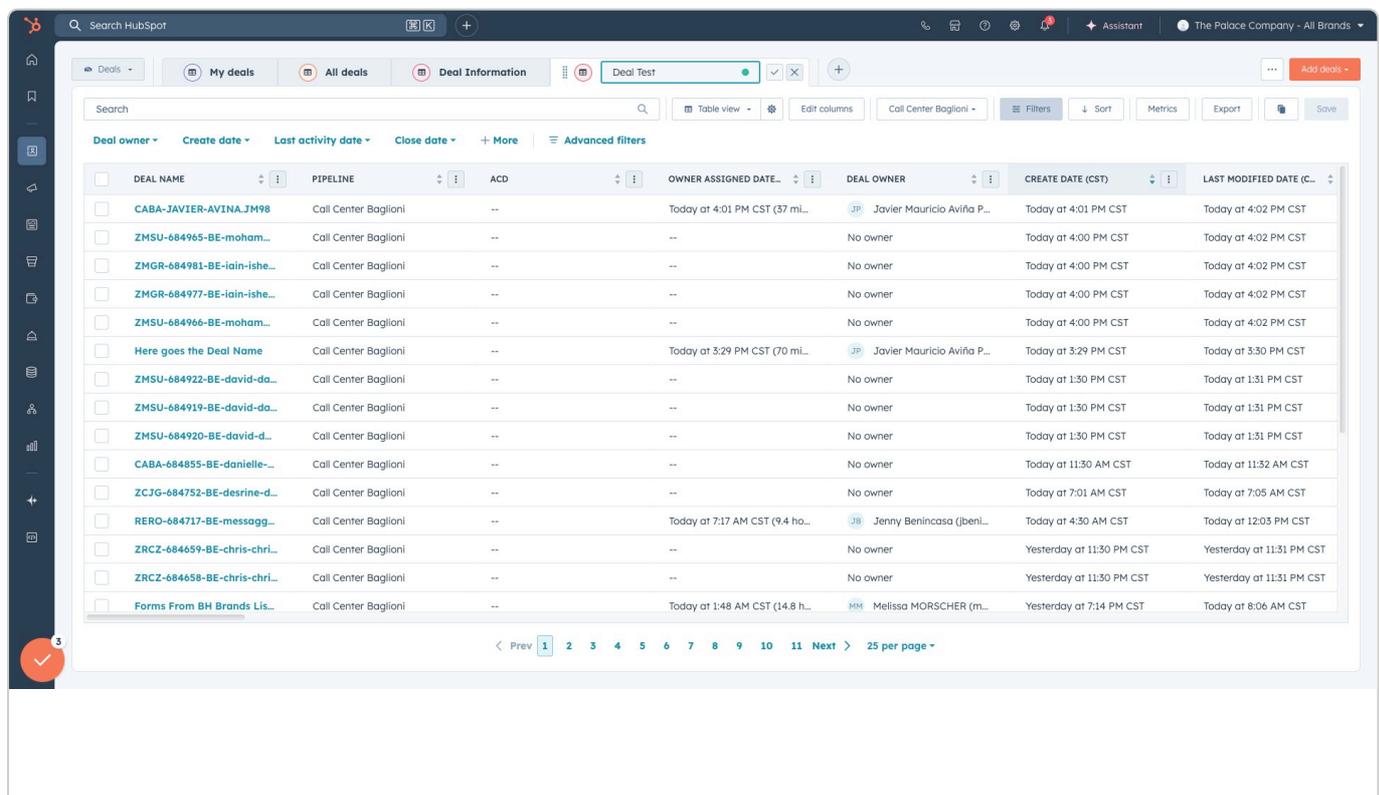
The screenshot shows the HubSpot interface with a dropdown menu for view types. The menu options are: Table view, Board, Report, Gantt, and Calendar. The 'Table view' option is highlighted. Below the menu, a table of deals is visible with columns: DEAL OWNER, PIPELINE, OWNER ASSIGNED DATE..., and ARRIVAL.

DEAL OWNER	PIPELINE	OWNER ASSIGNED DATE...	ARRIVAL
JP Javier Mauricio Aviña P...	Call Center Baglioni	Today at 4:01 PM CST (37 mi...	Tomorrow
JP Javier Mauricio Aviña P...	Call Center Baglioni	Today at 3:29 PM CST (69 mi...	Tomorrow
JB Jenny Benincasa (jbeni...	Call Center Baglioni	Today at 7:17 AM CST (9.3 ho...	Oct 17, 2025
AF Antonio Fiore (afiore@t...	Call Center Baglioni	Today at 1:49 AM CST (14.8 h...	Dec 13, 2025
MM Melissa MORSCHER (m...	Call Center Baglioni	Today at 1:48 AM CST (14.8 h...	--
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Today at 1:46 AM CST (14.9 h...	Jan 30, 2026
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Yesterday at 6:12 AM CST (1...	Nov 7, 2025
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Yesterday at 6:12 AM CST (1...	Nov 7, 2025
LG Luca Grasso (lgrasso@...	Call Center Baglioni	Yesterday at 6:12 AM CST (1...	Nov 7, 2025

4

Type the name of your view

Now, we can set up all the filters that we want for our view.



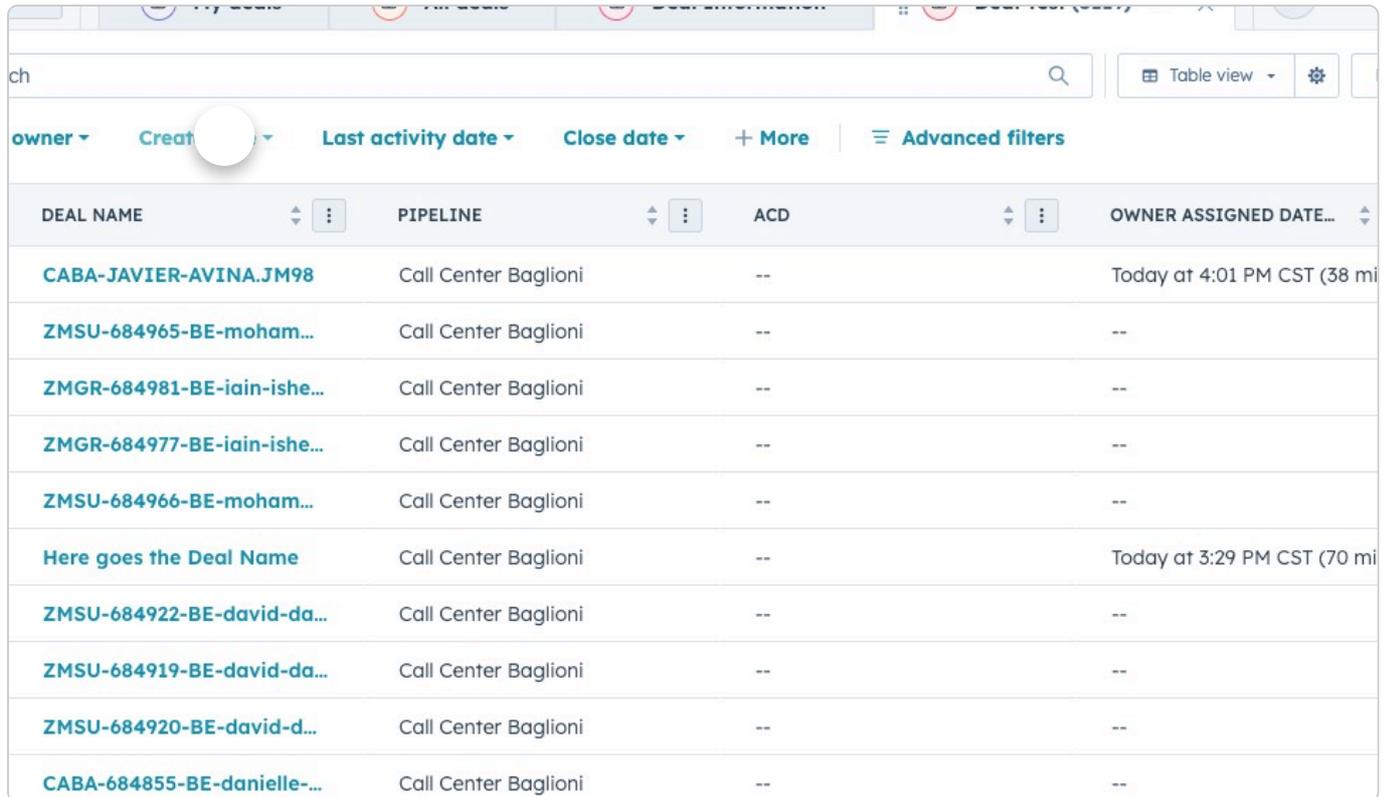
The screenshot shows the HubSpot interface with a list of deals. The 'Deal Test' filter is applied. The table has columns: DEAL NAME, PIPELINE, ACD, OWNER ASSIGNED DATE..., DEAL OWNER, CREATE DATE (CST), and LAST MODIFIED DATE (CST). The deals are sorted by 'Create date (CST)'.

DEAL NAME	PIPELINE	ACD	OWNER ASSIGNED DATE...	DEAL OWNER	CREATE DATE (CST)	LAST MODIFIED DATE (CST)
CABA-JAVIER-AVINA-JM98	Call Center Baglioni	--	Today at 4:01 PM CST (37 mi...	JP Javier Mauricio Aviña P...	Today at 4:01 PM CST	Today at 4:02 PM CST
ZMSU-684965-BE-moham...	Call Center Baglioni	--	--	No owner	Today at 4:00 PM CST	Today at 4:02 PM CST
ZMGR-684981-BE-lain-ishe...	Call Center Baglioni	--	--	No owner	Today at 4:00 PM CST	Today at 4:02 PM CST
ZMGR-684977-BE-lain-ishe...	Call Center Baglioni	--	--	No owner	Today at 4:00 PM CST	Today at 4:02 PM CST
ZMSU-684966-BE-moham...	Call Center Baglioni	--	--	No owner	Today at 4:00 PM CST	Today at 4:02 PM CST
Here goes the Deal Name	Call Center Baglioni	--	Today at 3:29 PM CST (70 mi...	JP Javier Mauricio Aviña P...	Today at 3:29 PM CST	Today at 3:30 PM CST
ZMSU-684922-BE-david-da...	Call Center Baglioni	--	--	No owner	Today at 1:30 PM CST	Today at 1:31 PM CST
ZMSU-684919-BE-david-da...	Call Center Baglioni	--	--	No owner	Today at 1:30 PM CST	Today at 1:31 PM CST
ZMSU-684920-BE-david-d...	Call Center Baglioni	--	--	No owner	Today at 1:30 PM CST	Today at 1:31 PM CST
CABA-684855-BE-danielle...	Call Center Baglioni	--	--	No owner	Today at 11:30 AM CST	Today at 11:32 AM CST
ZCJG-684752-BE-desrine-d...	Call Center Baglioni	--	--	No owner	Today at 7:01 AM CST	Today at 7:05 AM CST
RERO-684717-BE-messagg...	Call Center Baglioni	--	Today at 7:17 AM CST (9.4 ho...	JB Jenny Benincasa (jbeni...	Today at 4:30 AM CST	Today at 12:03 PM CST
ZRCZ-684659-BE-chris-chri...	Call Center Baglioni	--	--	No owner	Yesterday at 11:30 PM CST	Yesterday at 11:31 PM CST
ZRCZ-684658-BE-chris-chri...	Call Center Baglioni	--	--	No owner	Yesterday at 11:30 PM CST	Yesterday at 11:31 PM CST
Forms From BH Brands Lis...	Call Center Baglioni	--	Today at 1:48 AM CST (14.8 h...	MM Melissa MORSCHER (m...	Yesterday at 7:14 PM CST	Today at 8:06 AM CST

5

Click on Create date

With this filter we can refine according to the creation date of the deal

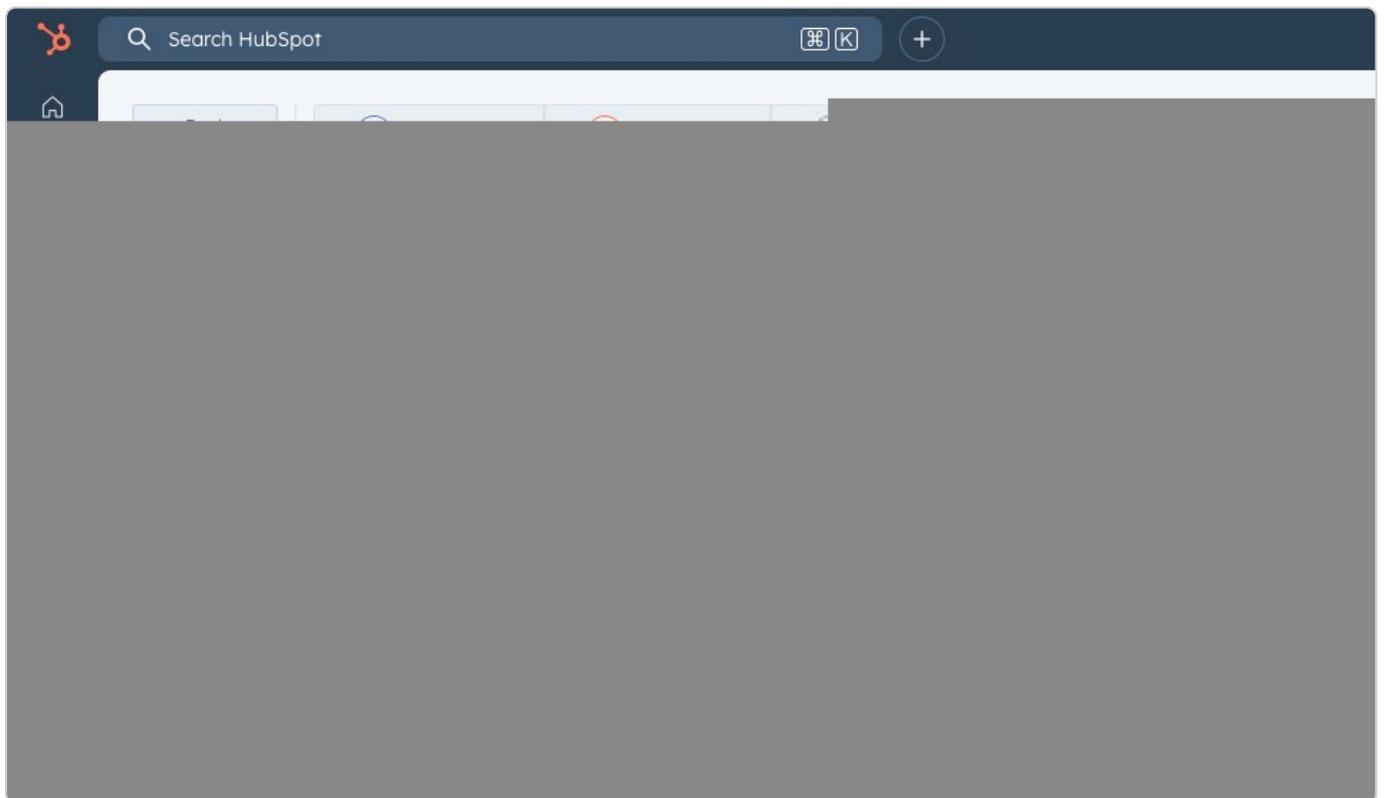


The screenshot shows a CRM interface with a table of deals. The 'Create' filter dropdown is highlighted with a white circle. The table has columns for DEAL NAME, PIPELINE, ACD, and OWNER ASSIGNED DATE. The deals listed are:

DEAL NAME	PIPELINE	ACD	OWNER ASSIGNED DATE...
CABA-JAVIER-AVINA.JM98	Call Center Baglioni	--	Today at 4:01 PM CST (38 mi
ZMSU-684965-BE-moham...	Call Center Baglioni	--	--
ZMGR-684981-BE-iain-ishe...	Call Center Baglioni	--	--
ZMGR-684977-BE-iain-ishe...	Call Center Baglioni	--	--
ZMSU-684966-BE-moham...	Call Center Baglioni	--	--
Here goes the Deal Name	Call Center Baglioni	--	Today at 3:29 PM CST (70 mi
ZMSU-684922-BE-david-da...	Call Center Baglioni	--	--
ZMSU-684919-BE-david-da...	Call Center Baglioni	--	--
ZMSU-684920-BE-david-d...	Call Center Baglioni	--	--
CABA-684855-BE-danielle-...	Call Center Baglioni	--	--

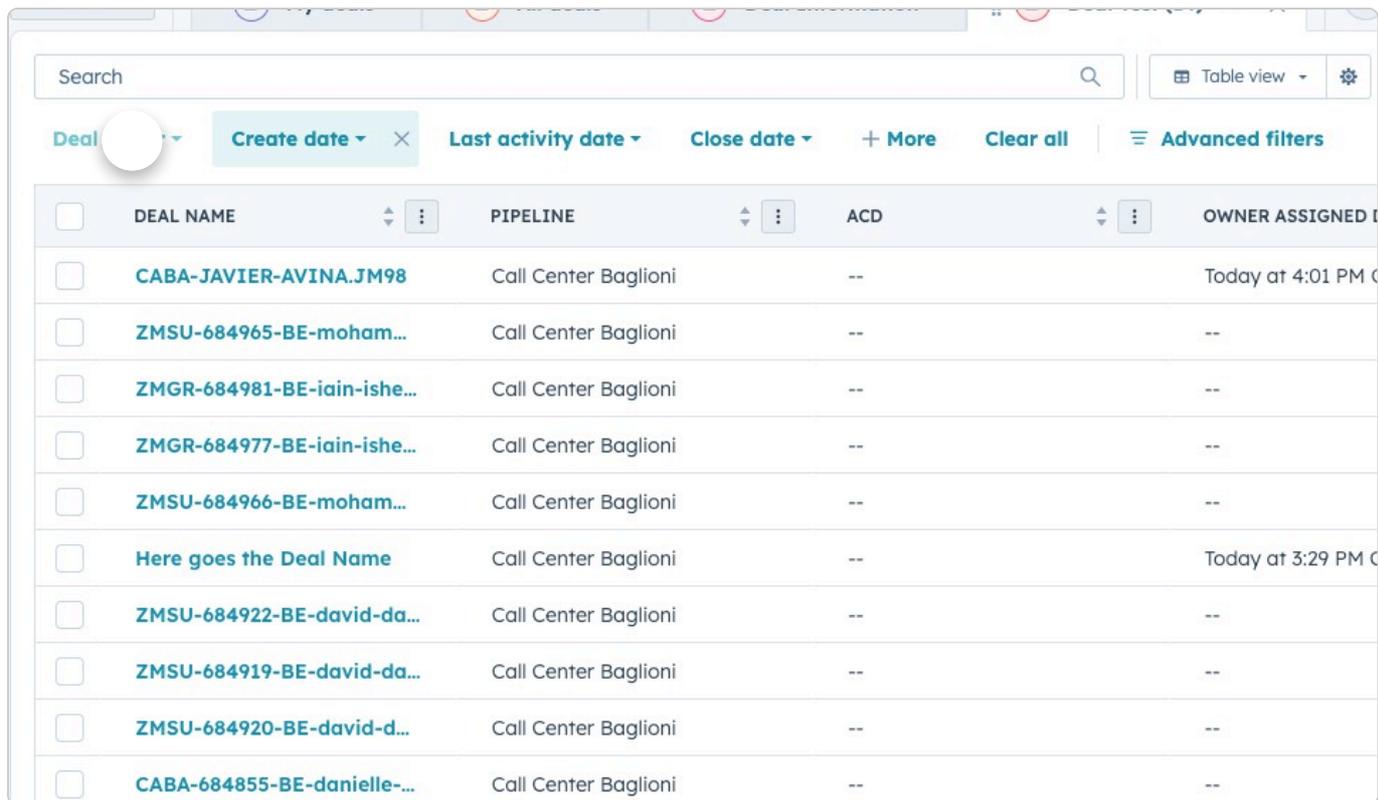
6

We can choose from different options



7 Click on Deal Owner

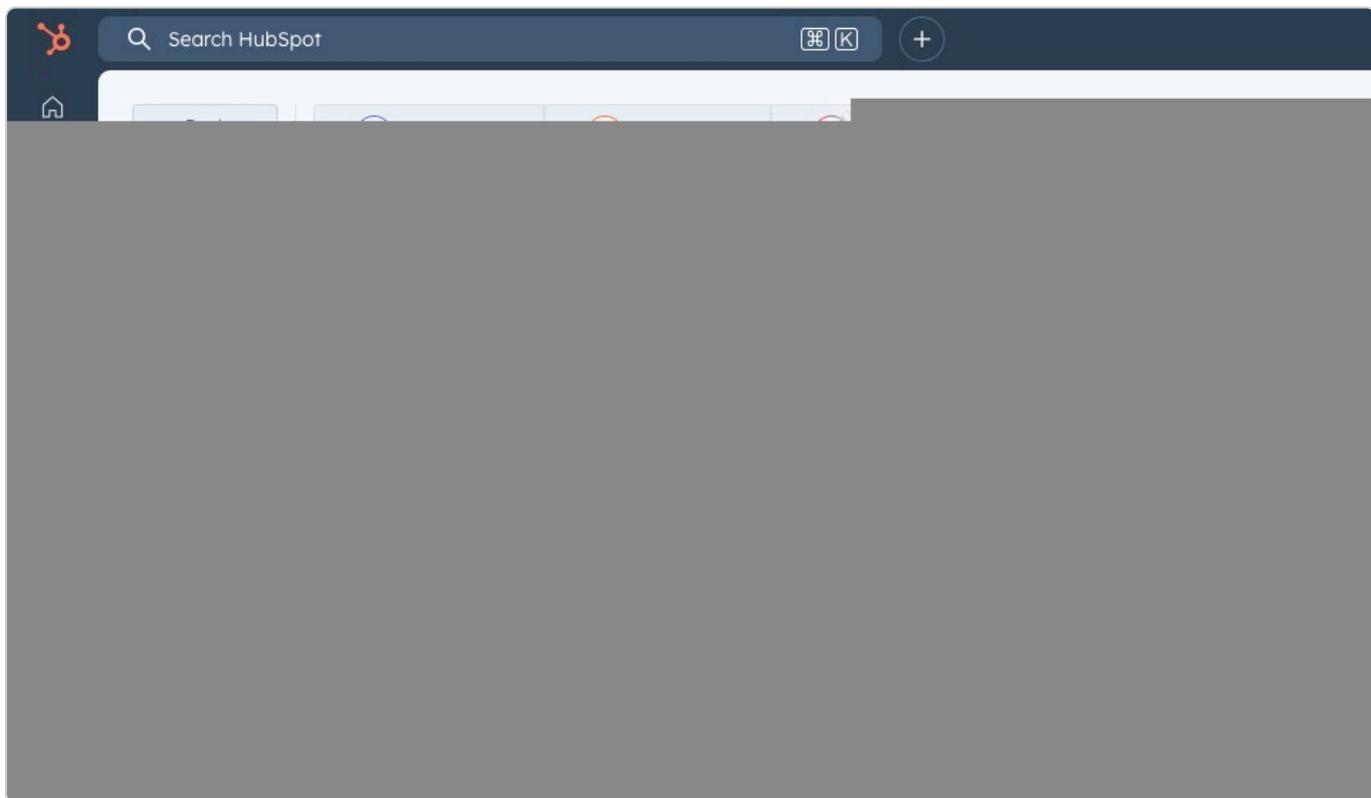
With this option we can filter by the deal owner



The screenshot shows a CRM interface with a table of deals. A filter dropdown menu is open over the 'Deal' column header, showing options like 'Create date', 'Last activity date', and 'Close date'. The table below has columns for DEAL NAME, PIPELINE, ACD, and OWNER ASSIGNED. The first row is highlighted.

<input type="checkbox"/>	DEAL NAME	PIPELINE	ACD	OWNER ASSIGNED
<input type="checkbox"/>	CABA-JAVIER-AVINA.JM98	Call Center Baglioni	--	Today at 4:01 PM C
<input type="checkbox"/>	ZMSU-684965-BE-moham...	Call Center Baglioni	--	--
<input type="checkbox"/>	ZMGR-684981-BE-iaian-ishe...	Call Center Baglioni	--	--
<input type="checkbox"/>	ZMGR-684977-BE-iaian-ishe...	Call Center Baglioni	--	--
<input type="checkbox"/>	ZMSU-684966-BE-moham...	Call Center Baglioni	--	--
<input type="checkbox"/>	Here goes the Deal Name	Call Center Baglioni	--	Today at 3:29 PM C
<input type="checkbox"/>	ZMSU-684922-BE-david-da...	Call Center Baglioni	--	--
<input type="checkbox"/>	ZMSU-684919-BE-david-da...	Call Center Baglioni	--	--
<input type="checkbox"/>	ZMSU-684920-BE-david-d...	Call Center Baglioni	--	--
<input type="checkbox"/>	CABA-684855-BE-danielle-...	Call Center Baglioni	--	--

8 Click on specific deal owner



... × + Save now to keep your edit

ble view ⌵ ⚙ Edit columns Call Center Baglioni ⌵ Filters (2) × ↓ Sort Metrics Export 📄

Advanced filters

OWNER ASSIGNED DATE... ⌵ ⋮	DEAL OWNER ⌵ ⋮	CREATE DATE (CST) ⌵ ⋮	LAST MODIFIED DATE (C... ⌵ ⋮
Today at 4:01 PM CST (38 mi...	JP Javier Mauricio Aviña P...	Today at 4:01 PM CST	Today at 4:02 PM CST
Today at 3:29 PM CST (70 mi...	JP Javier Mauricio Aviña P...	Today at 3:29 PM CST	Today at 3:30 PM CST

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