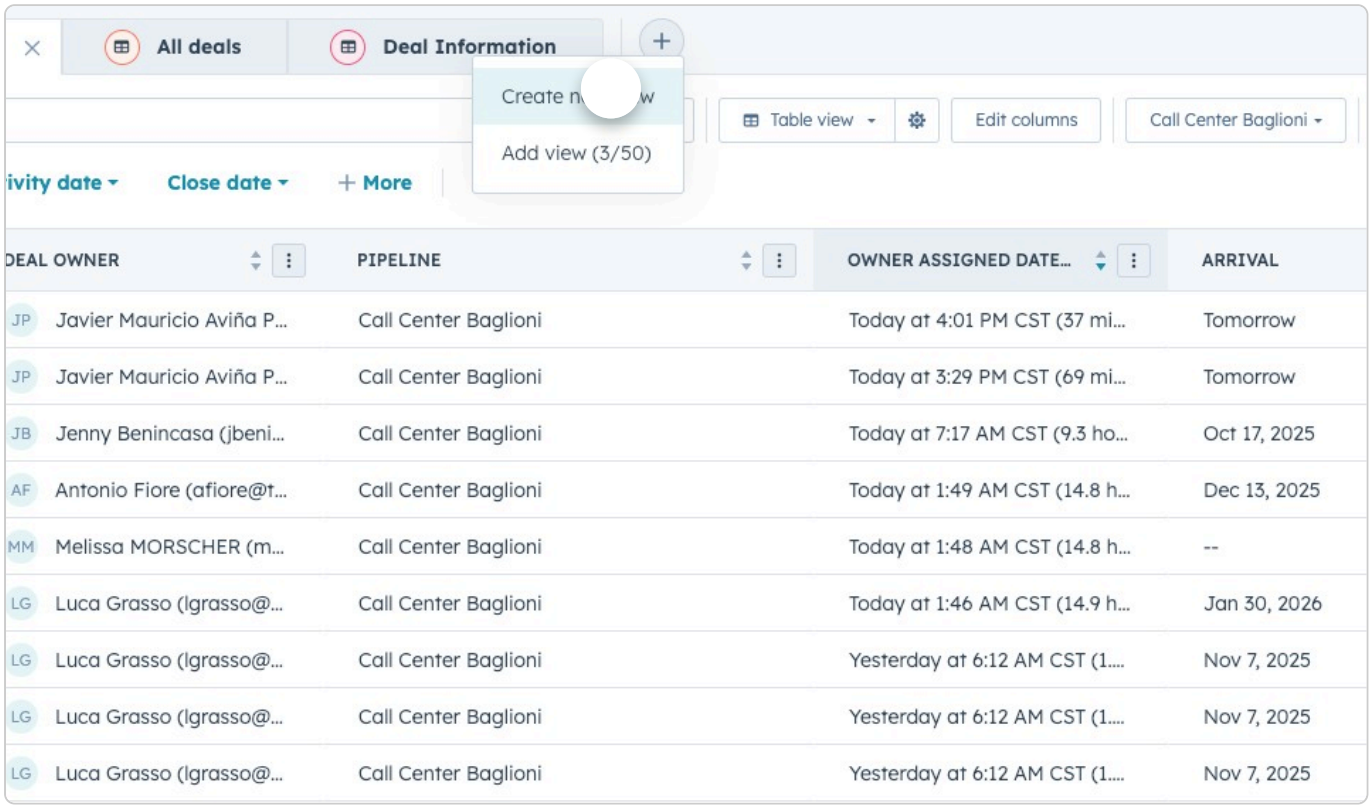
Guide how to create a custom view

Última actualización: 9 de oct. de 2025

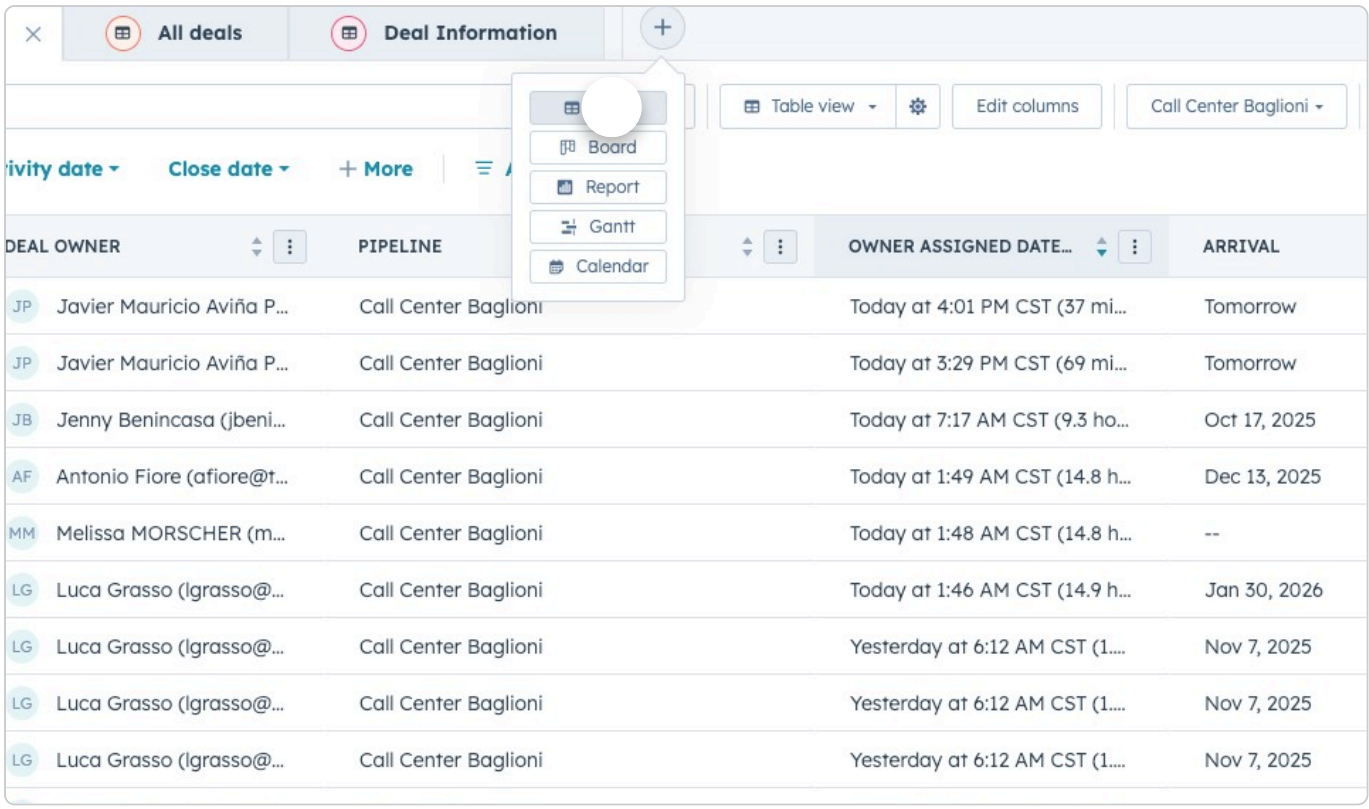
1 Navigate to Deals | My deals

2 Click on highlighted area



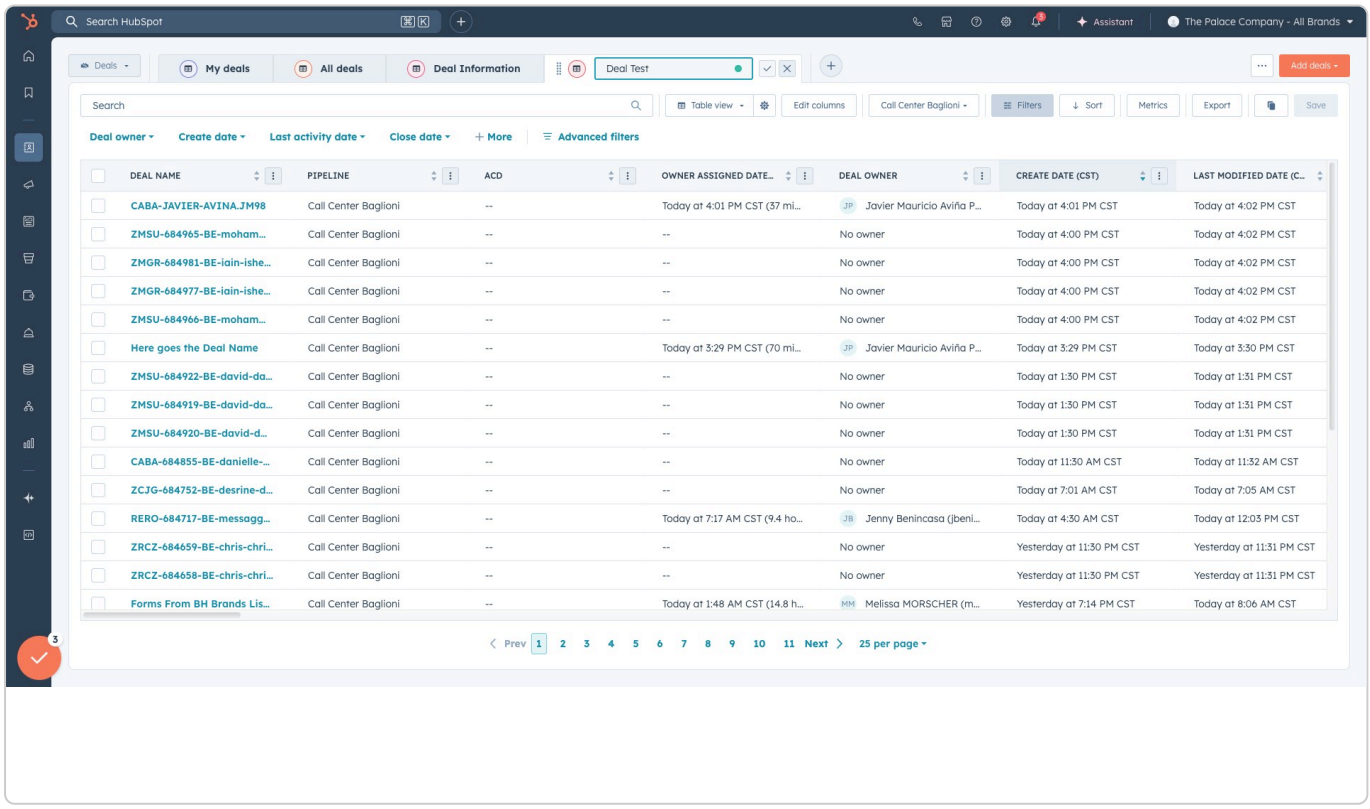
3 Click on view type

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



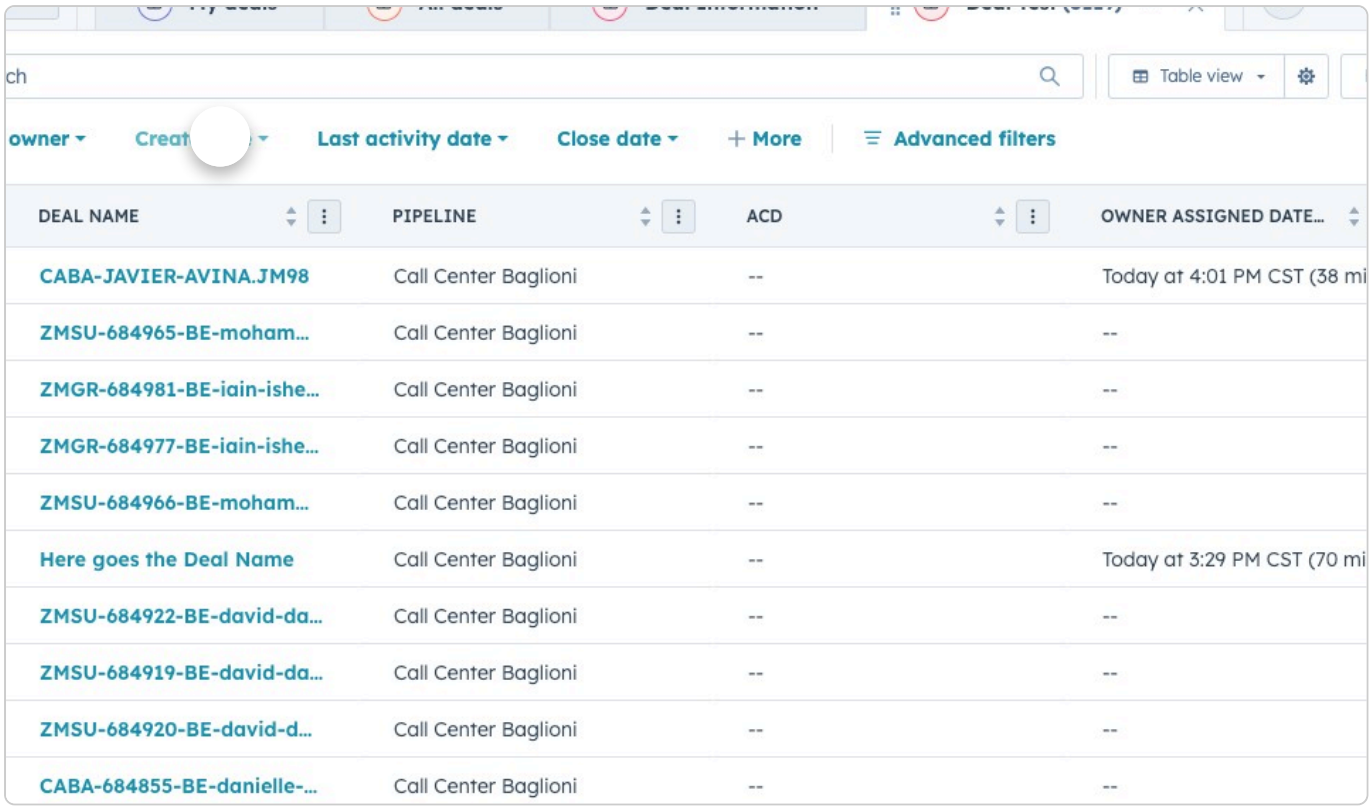
4 Type the name of your view

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

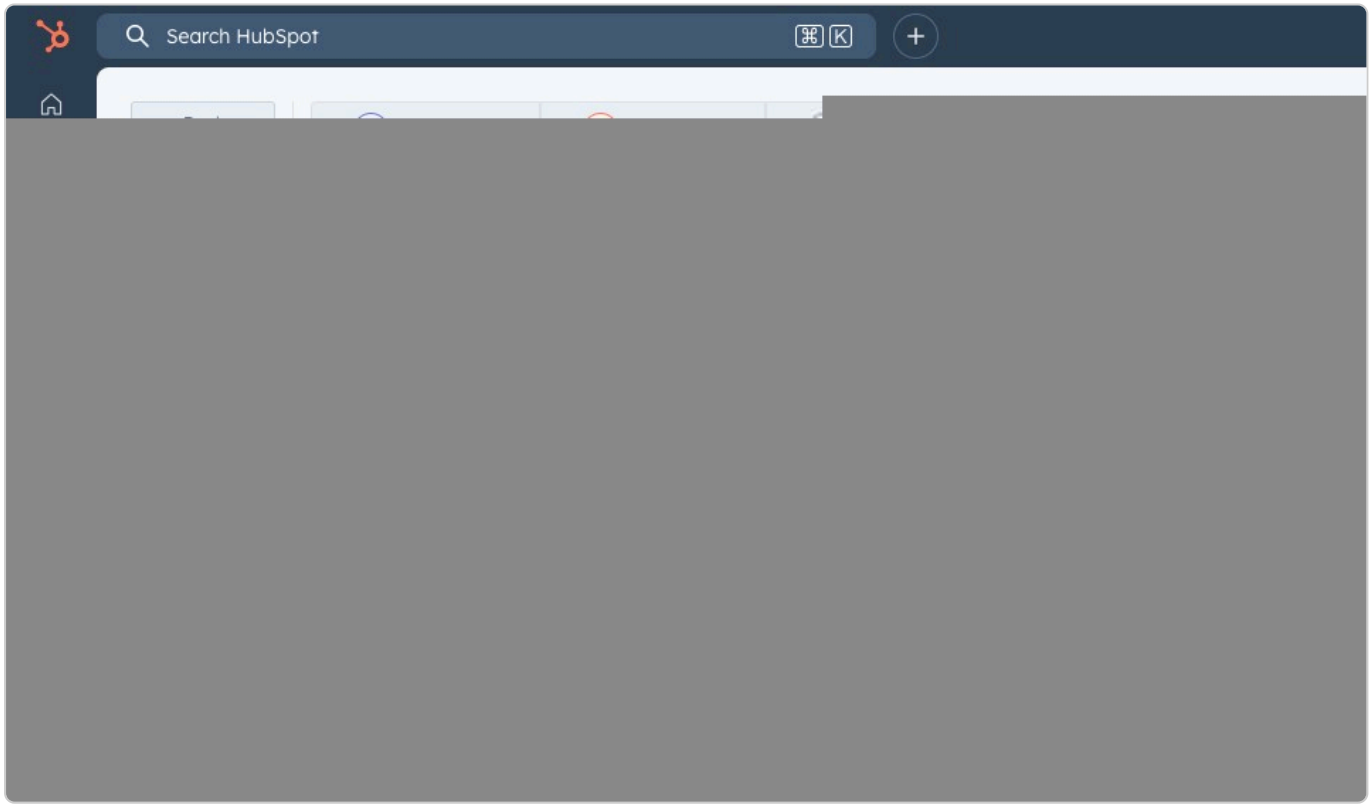


5 Click on Create date

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

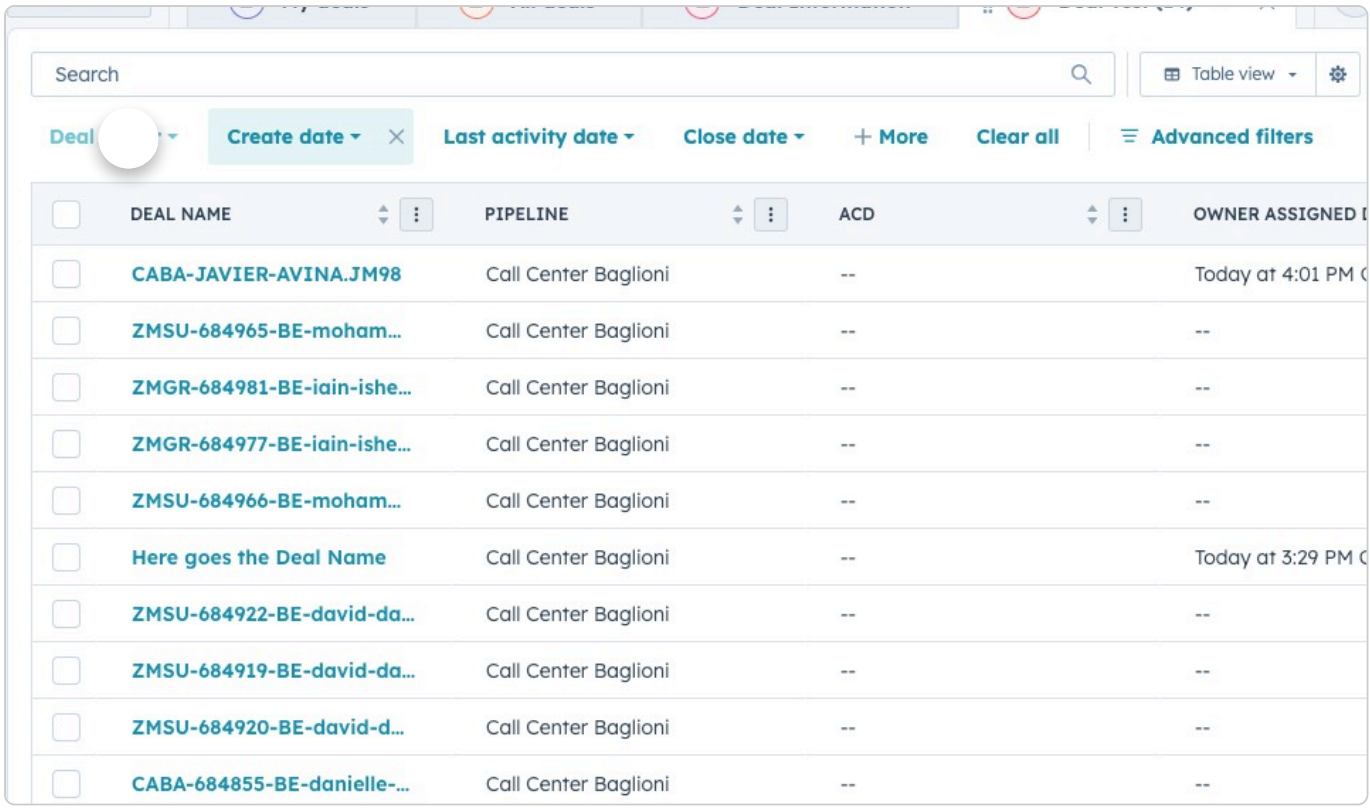


6 We can choose from different options

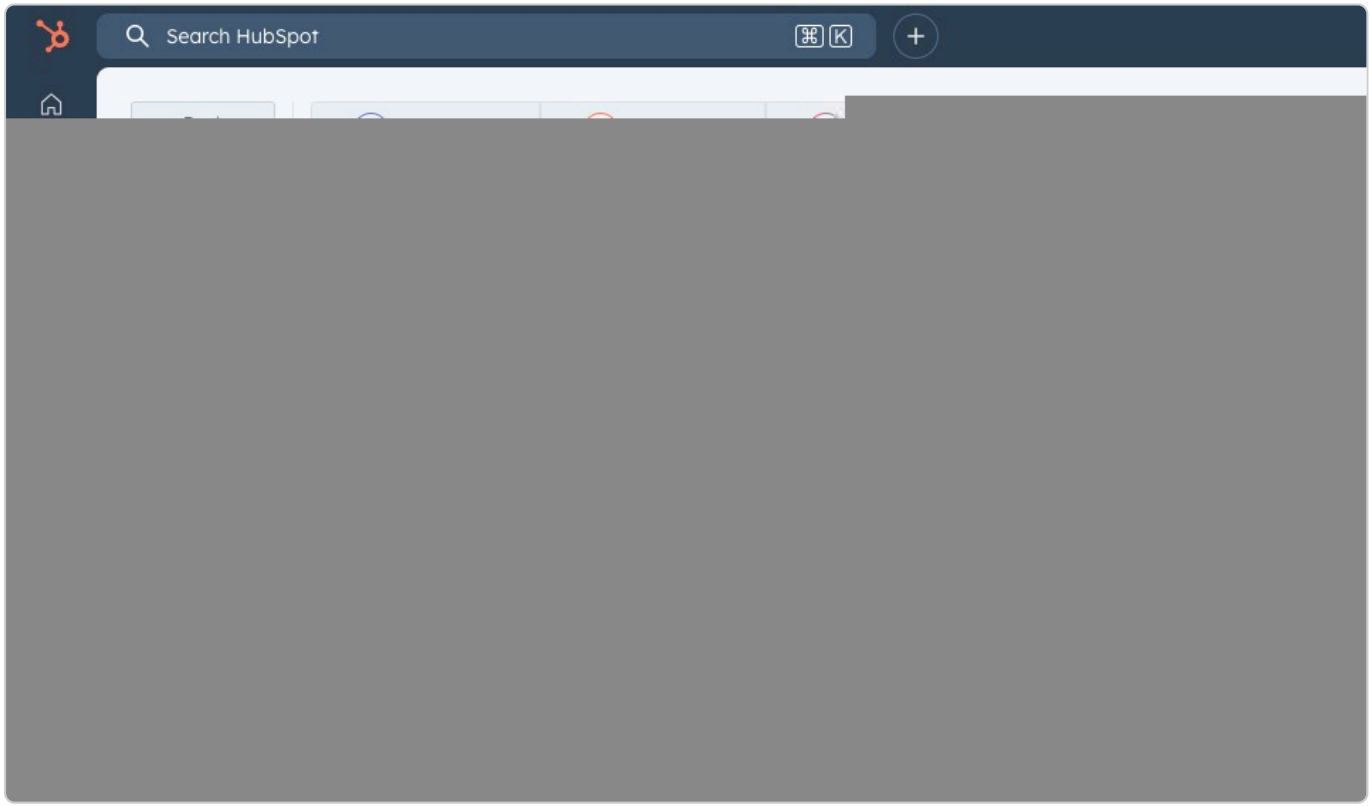
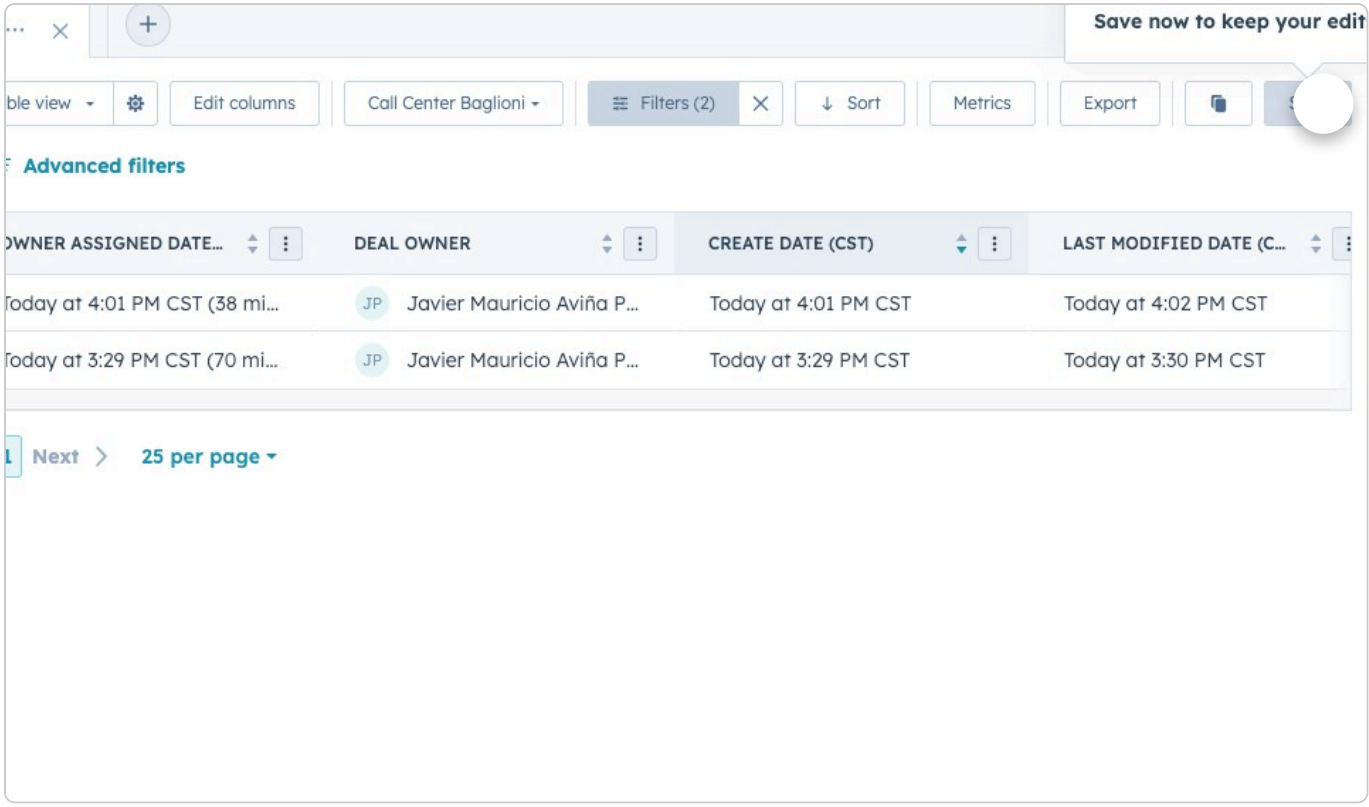


7 Click on Deal Owner

With this option we can filter by the deal owner



8 Click on specific deal owner



9 Click on save view