

How to set up legal basis

Última actualización: 27 de ago. de 2025

1 **Navigate to the Contact**

2 **Click on highlighted area**

Francisco Tamayo
ero CRM
@thepalacecompany.com

Call Task Meeting More

act Actions

Overview Activities

Recent activities

Search activities

Activity

Data highlights

CREATE DATE	LIFECYCLE STAGE
12/11/2024 8:40 AM CST	Cliente

Templ

To

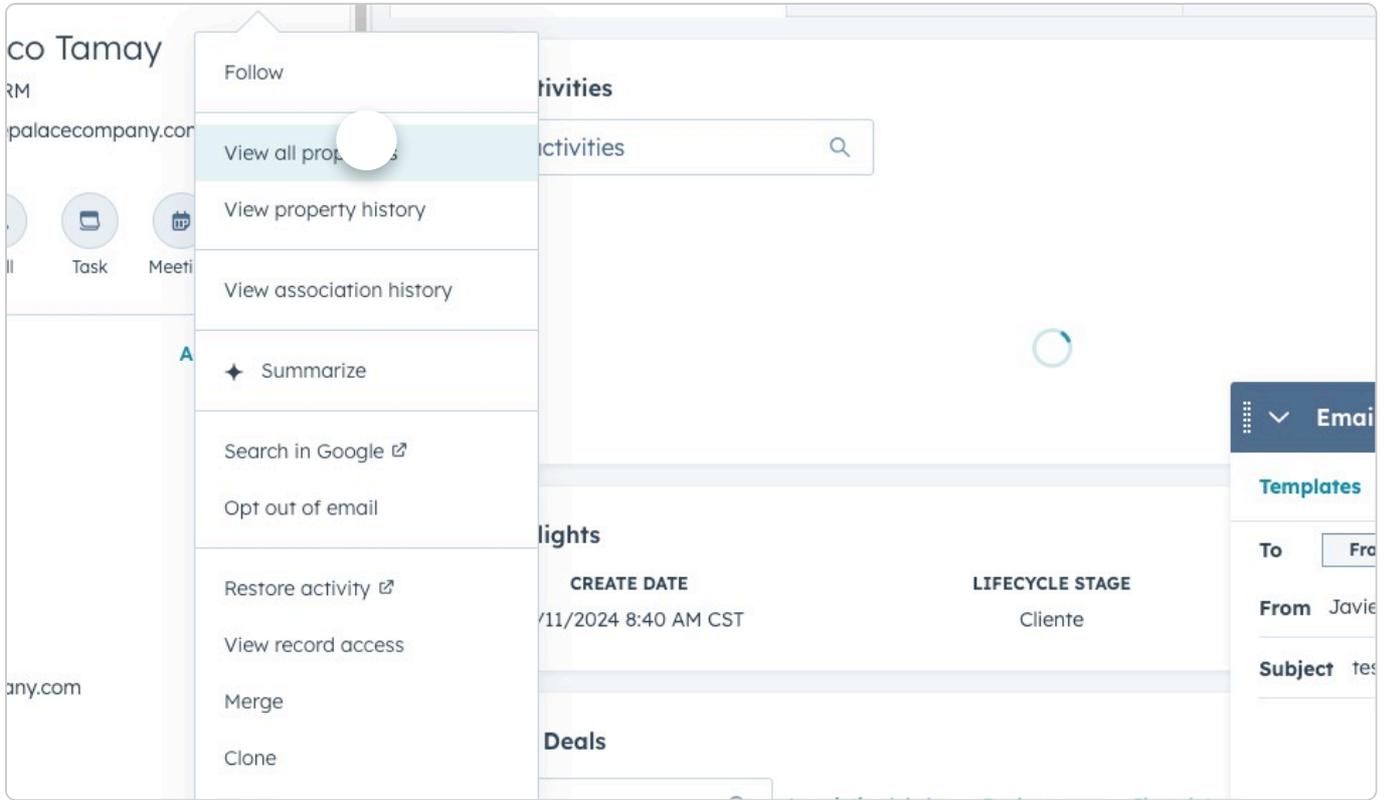
From

Subjec

company.com

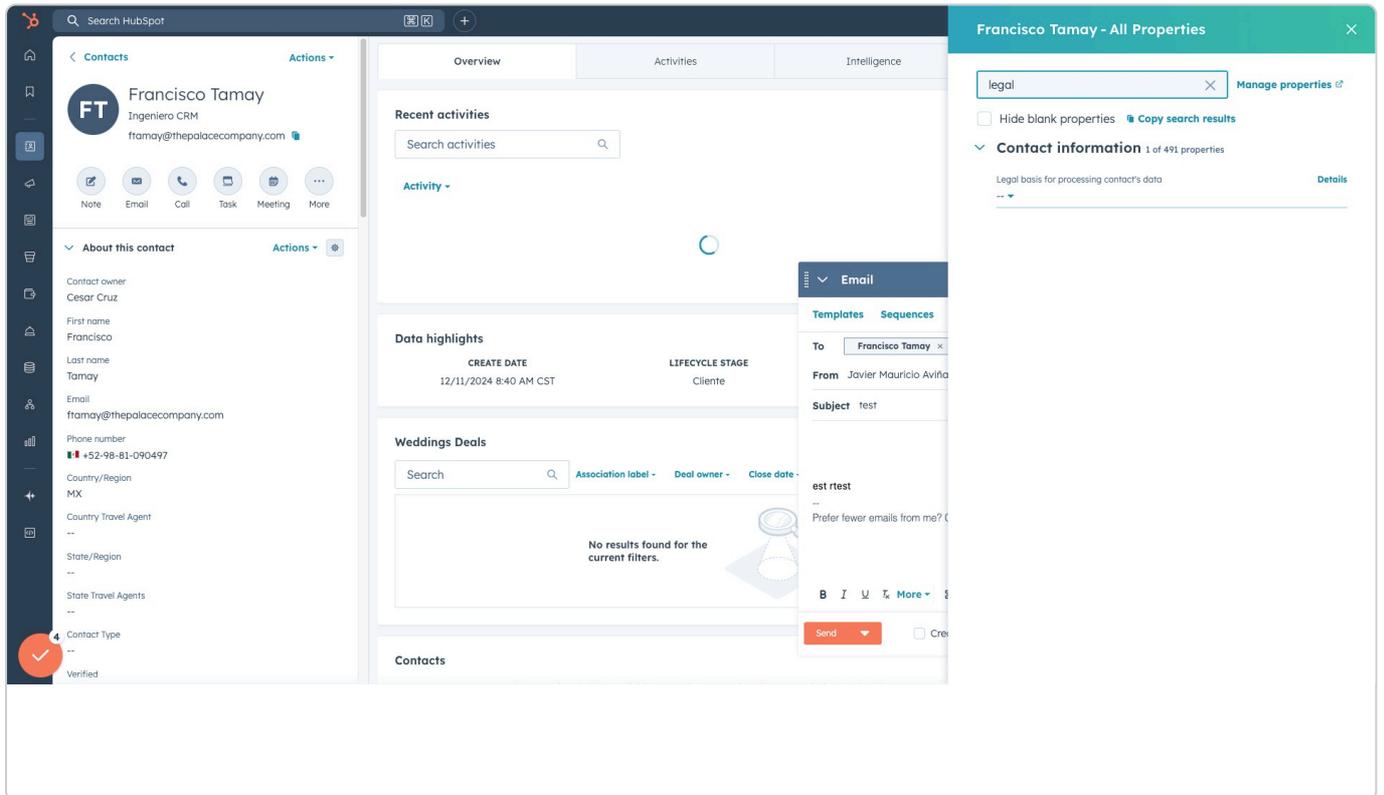
3

Click on View all properties



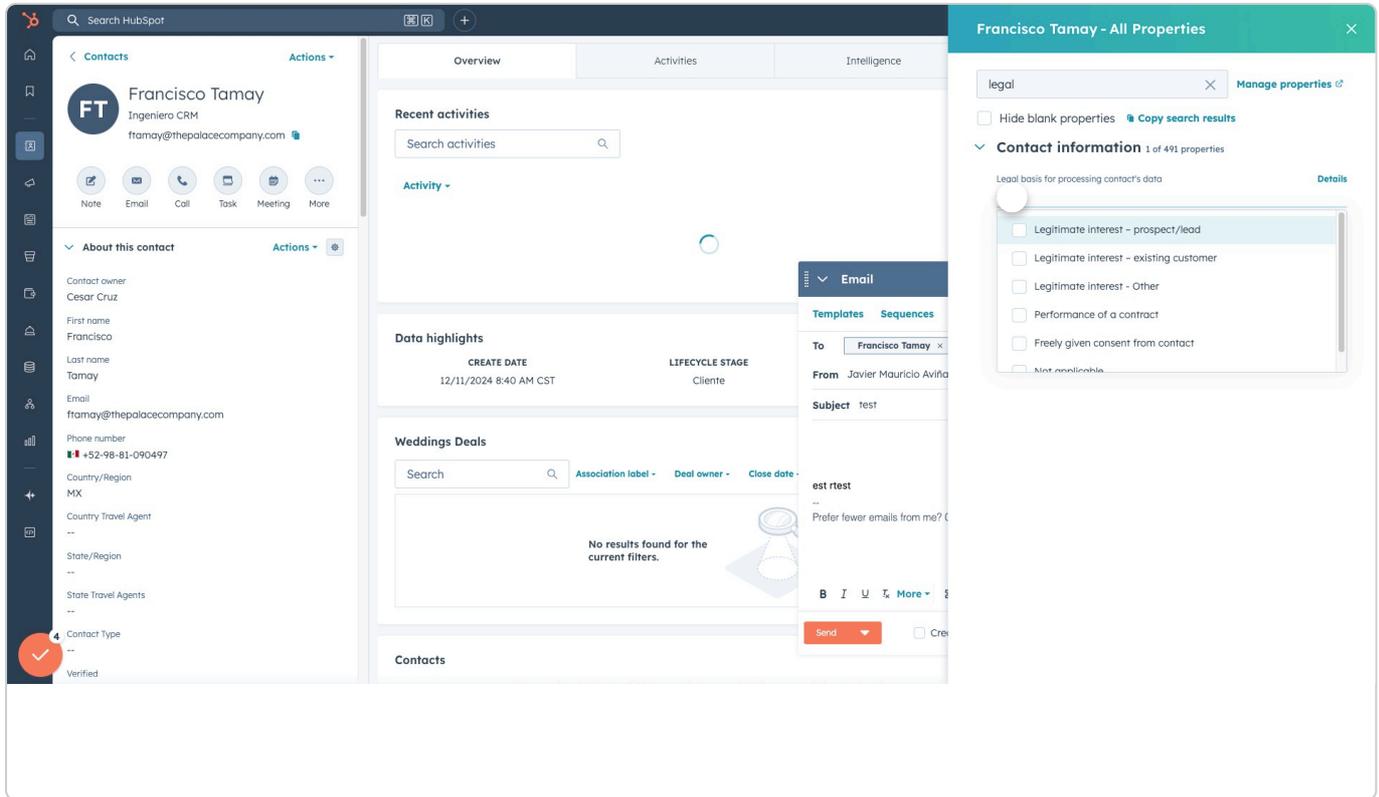
4

Type legal basis



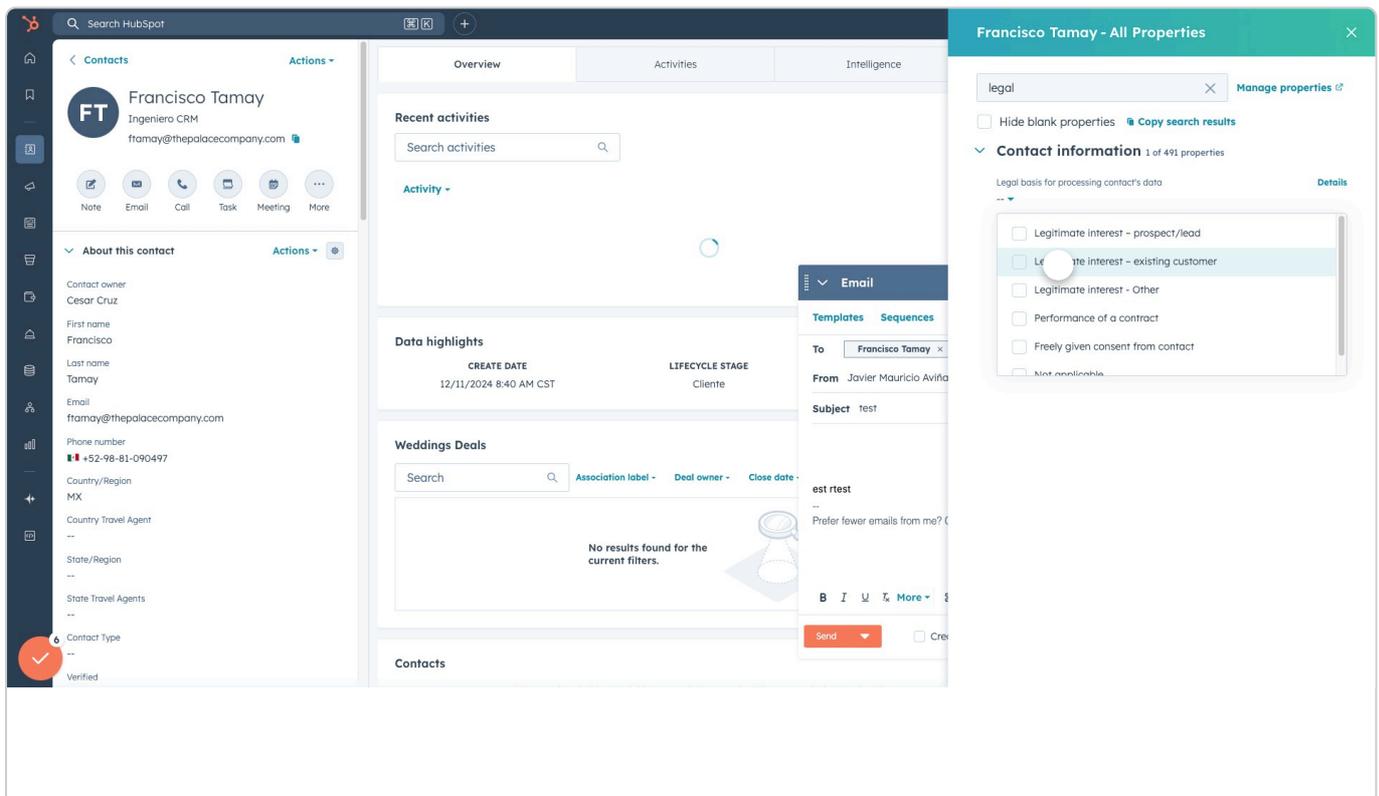
5

Click on the dropdown menu



6

Click on the option that applies



7 Check option

The screenshot shows the HubSpot CRM interface for a contact named Francisco Tamay. The contact's details are visible on the left, including their name, email, and phone number. The main area displays the contact's profile, including a search for recent activities and a section for 'Weddings Deals'. A dropdown menu is open, showing options for 'Legitimate interest - existing customer' and 'Legitimate interest - prospect/lead'. The 'Legitimate interest - existing customer' option is selected. A red checkmark is visible in the bottom left corner of the interface.

8 Click on highlighted area

This is a close-up view of the dropdown menu from the previous screenshot. The 'Legitimate interest - existing customer' option is highlighted with a white circle, and a red checkmark is visible next to it. The other options in the menu are 'Legitimate interest - prospect/lead', 'Legitimate interest - Other', 'Performance of a contract', 'Freely given consent from contact', and 'Not applicable'.

9

Click on Close

Francisco Tamay - All Properties

legal ✕ [Manage properties](#)

Hide blank properties [Copy search results](#)

▼ **Contact information** 1 of 491 properties

Legal basis for processing contact's data

Legitimate interest - existing customer ✕

▼ Email

Templates Sequences

To **Francisco Tamay** ✕

From Javier Mauricio Aviña

Subject test

Intelligence

RECYCLE STAGE
Cliente

10

Click on Create an email

▼ Email

Templates Sequences Documents Meetings

To **Francisco Tamay** ✕

From Javier Mauricio Aviña Pech (javina@thepalacecompany.co)

Subject test

est rtest

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B I U [More](#) [Insert](#)

Highlights

CREATE DATE	LIFECYCLE STAGE
12/11/2024 8:40 AM CST	Cliente

Deals

Search Association label Deal owner Close date

No results found for the current filters.

Highlights

CREATE DATE	LIFECYCLE STAGE
12/11/2024 8:40 AM CST	Cliente

Dealings Deals

Search Association label - Deal owner - Close date -

No results found for the current filters.

facts

To Francisco Tamay x

From Javier Mauricio Aviña Pech (javina@thepalacecompany.c)

Subject test

test

test rtest

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B *I* U  **More**   **Insert** 

Create a **To-do** task to follow up **Ir**

+ Add 