

Sola Salon Studios - Custom Views Filters

Filters allow you to find specific sets of contacts (Pros) deals quickly and easily. Custom views or saved views allow you to access those filtered views without having to apply them every single time you come into HubSpot.

In this guide we will be going through:

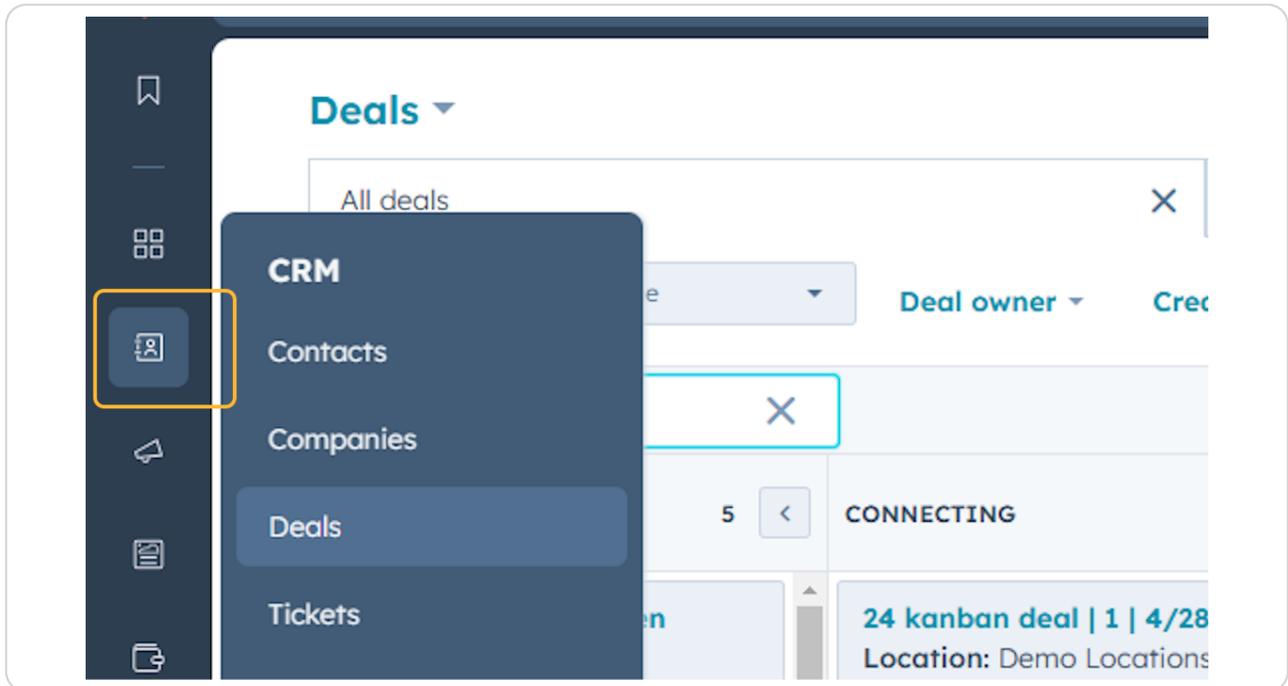
- Custom Views and Filters for Deals
- Note: The same process for Deals can be done with Contact (Pros)

25 Steps [View most recent version](#) 

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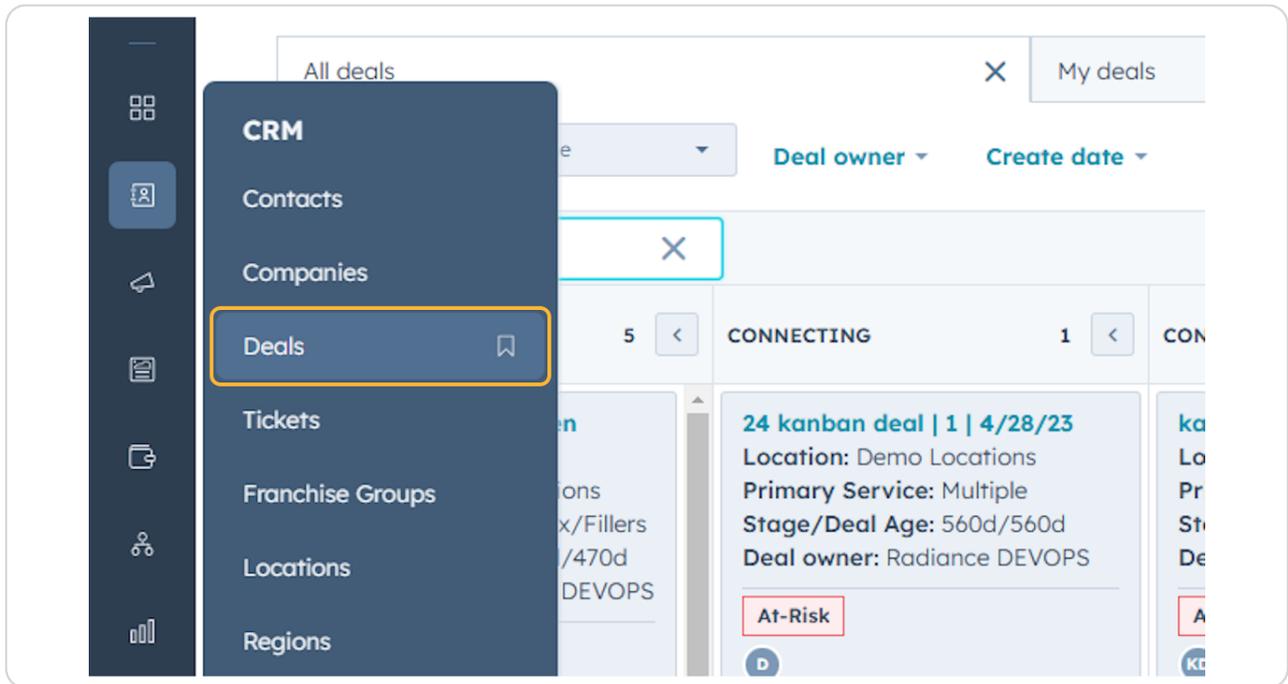
STEP 1

Navigate to Deals - Go to the CRM menu in the navigation to the left



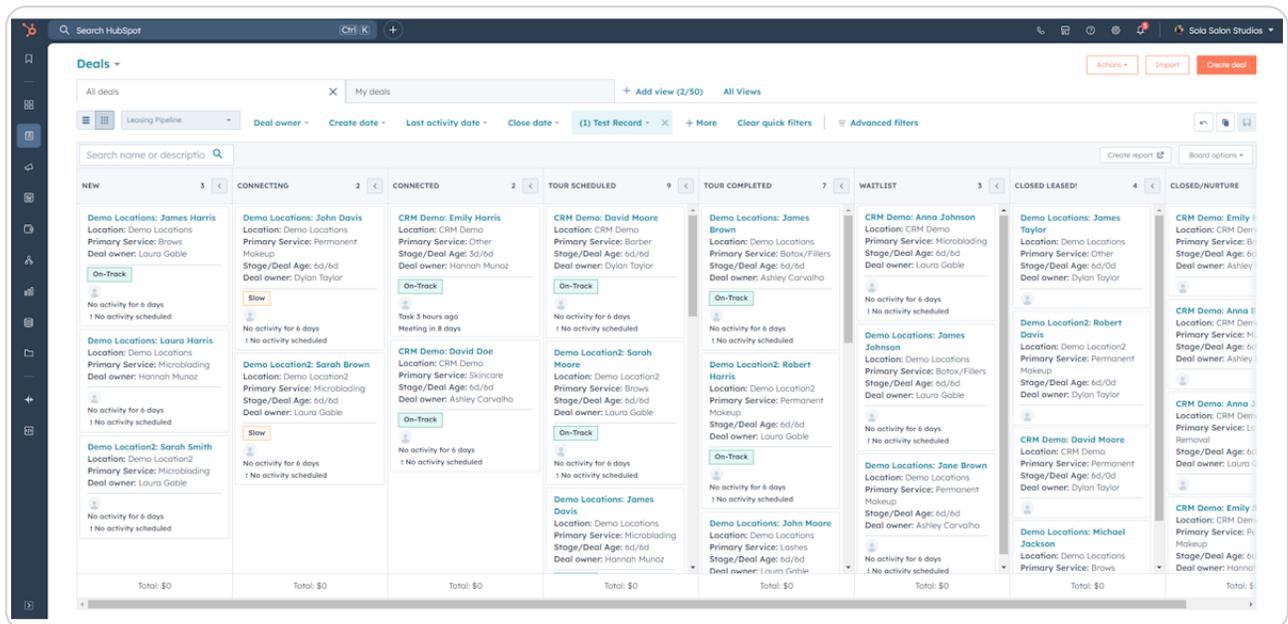
STEP 2

Click on Deals



STEP 3

You'll be brought to the Deal overview



STEP 4

At the top of the Deal overview are tabs you can jump between. These tabs are different views that filter on specific elements

The screenshot shows the HubSpot Deals overview page. At the top, there is a search bar with 'Search HubSpot' and a 'Ctrl K' shortcut. Below the search bar, there are two tabs: 'All deals' (highlighted with a yellow border) and 'My deals'. To the right of the tabs is a '+ Add view' button. Below the tabs, there are several filters: 'Leasing Pipeline', 'Deal owner', 'Create date', 'Last activity date', 'Close date', and '(1) Test Record'. A search bar for 'Search name or description' is also present. The main content area is divided into four columns representing deal stages: 'NEW' (3 deals), 'CONNECTING' (2 deals), 'CONNECTED' (2 deals), and 'TOUR SCHEDULED'. Each column contains a list of deal cards with details like name, location, primary service, stage/deal age, and deal owner. Status indicators like 'On-Track' or 'Slow' are shown for each deal.

STEP 5

For example, Click on My deals

The screenshot shows the HubSpot Deals overview page with the 'My deals' view selected. The main content area is divided into five columns representing deal stages: 'CONNECTED' (2 deals), 'TOUR SCHEDULED' (9 deals), 'TOUR COMPLETED' (7 deals), and 'WAITLIST'. Each column contains a list of deal cards with details like name, location, primary service, stage/deal age, and deal owner. Status indicators like 'On-Track' are shown for each deal. The 'WAITLIST' column shows deals with 'No activity for 6 days' and 'No activity scheduled'.

STEP 6

This view will show all the Deals where you are the Deal owner

The screenshot shows the HubSpot Deals interface. At the top, there's a search bar for HubSpot and a navigation bar with 'Actions', 'Import', and 'Create deal' buttons. Below that, the view is set to 'My deals' with a filter for '(1) Deal owner'. The pipeline stages are: NEW (0), CONNECTING (0), CONNECTED (1), TOUR SCHEDULED (5), TOUR COMPLETED (1), WAITLIST (0), and CLOSED LEASED (0). The 'TOUR SCHEDULED' stage is expanded to show five deal cards. Each card displays the deal name, location, primary service, stage/deal age, and deal owner (Hannah Munoz). The cards also show activity status: 'Slow' (Meeting 2 hours ago, Task due in 4 days) or 'On-Track' (Task 2 days ago, No activity scheduled). A 'Total: \$0' is shown at the bottom of each stage.

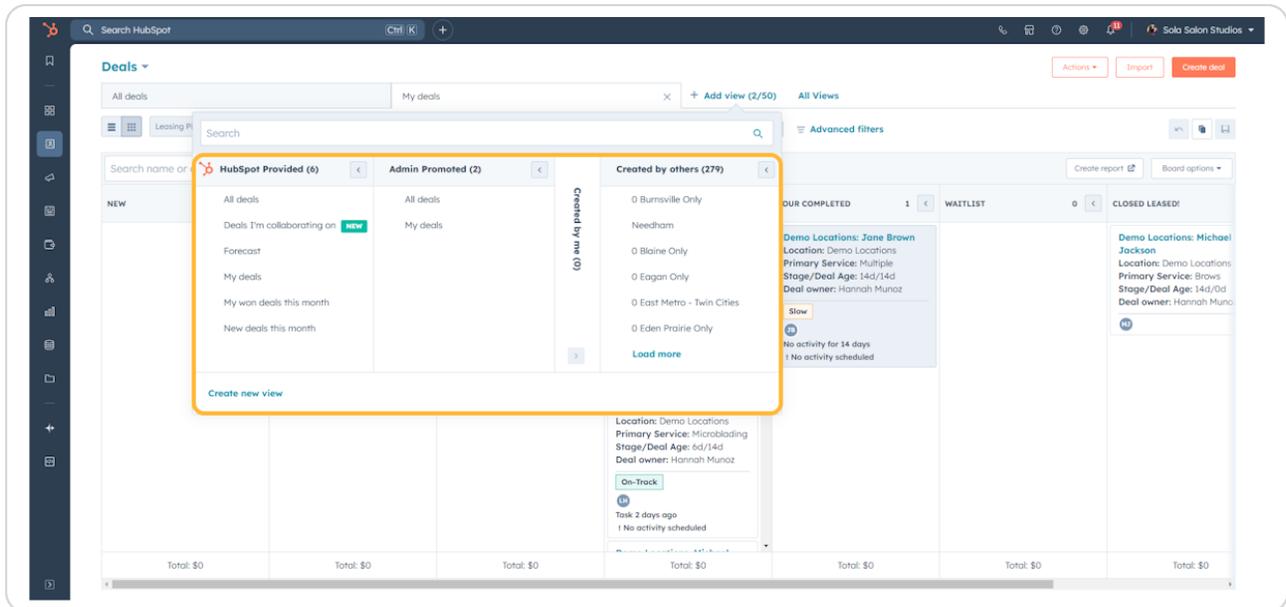
STEP 7

You can Add a view by Clicking on the +Add view

This close-up shows the view management controls. At the top, there's a search bar and a '+ Add view (2/50)' button highlighted with an orange box. To its right is the 'All Views' link. Below this, there are filters for 'Close date' and '+ More', along with 'Clear quick filters' and 'Advanced filters' buttons. At the bottom, the pipeline stages are visible: '1 <' for 'TOUR SCHEDULED', '5 <' for 'TOUR COMPLETED', and '1 <' for the next stage.

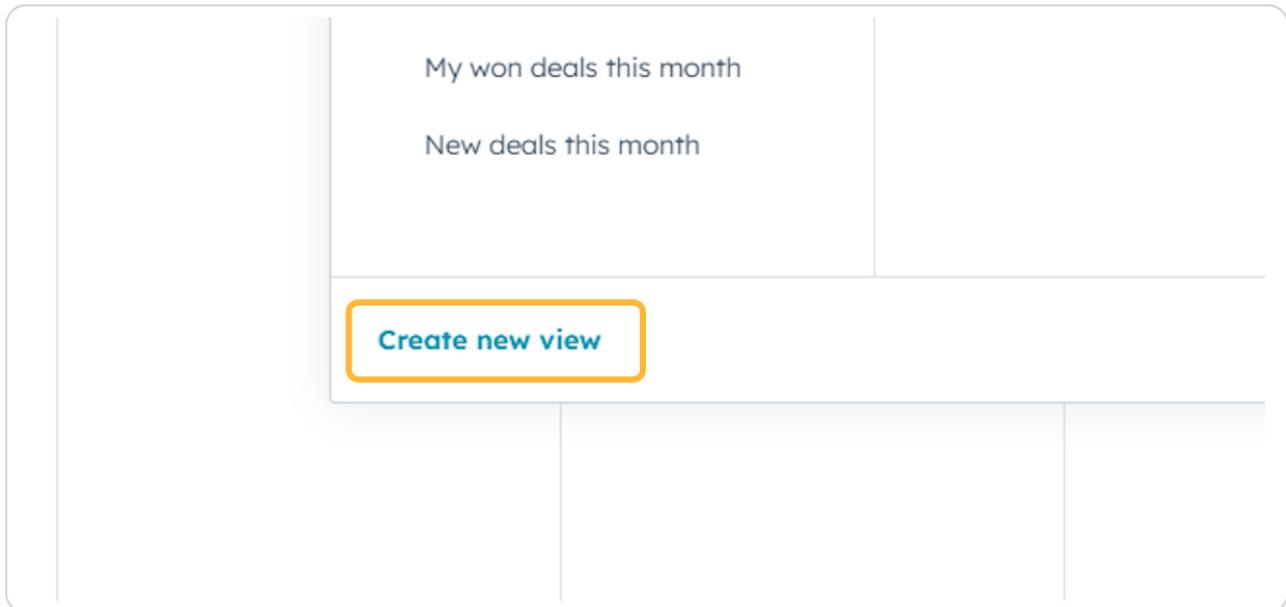
STEP 8

Here you can choose a view already created or you can Create a new view and include the filters you want to see



STEP 9

To create a new view, Click Create new view



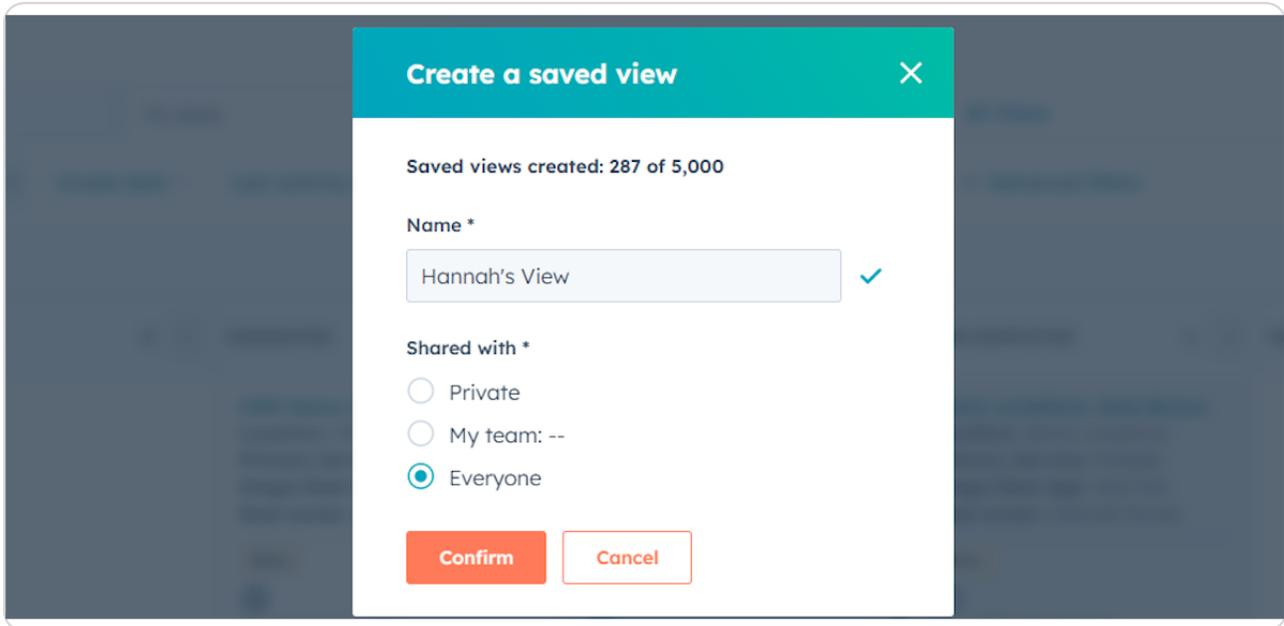
STEP 10

Add a Name and who the view is Shared with

Private - Only you can see the view

My team - Only those on your team can see the view

Everyone - All people within HubSpot can see the view



Create a saved view ✕

Saved views created: 287 of 5,000

Name *

Hannah's View ✓

Shared with *

Private

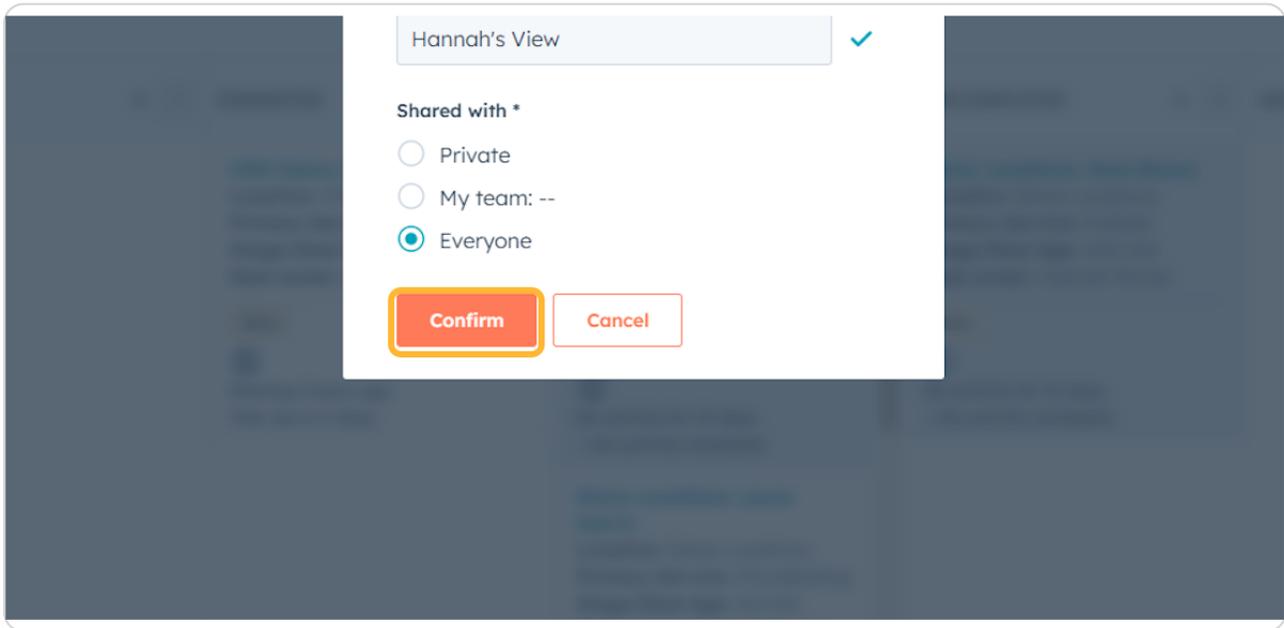
My team: --

Everyone

Confirm Cancel

STEP 11

Click Confirm

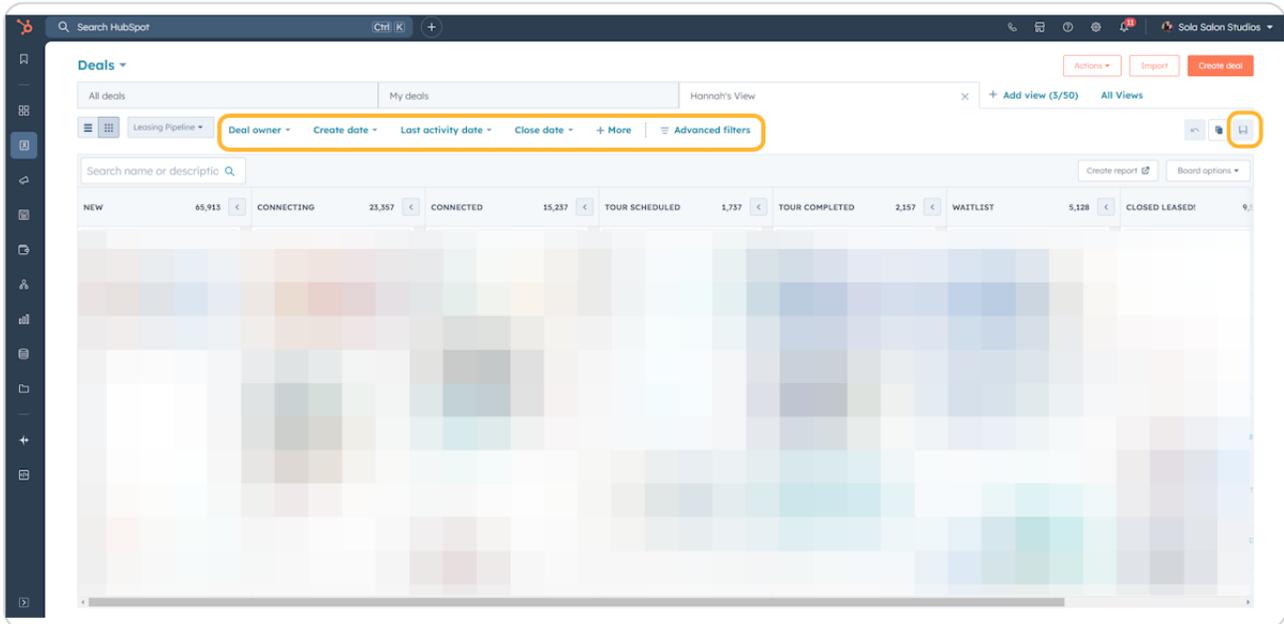


STEP 12

You will need to add Filters to the new view and Click Save when you're done to lock them in place

The new view will not be configured how you want it when initially created. Follow the below steps to understand Filters.

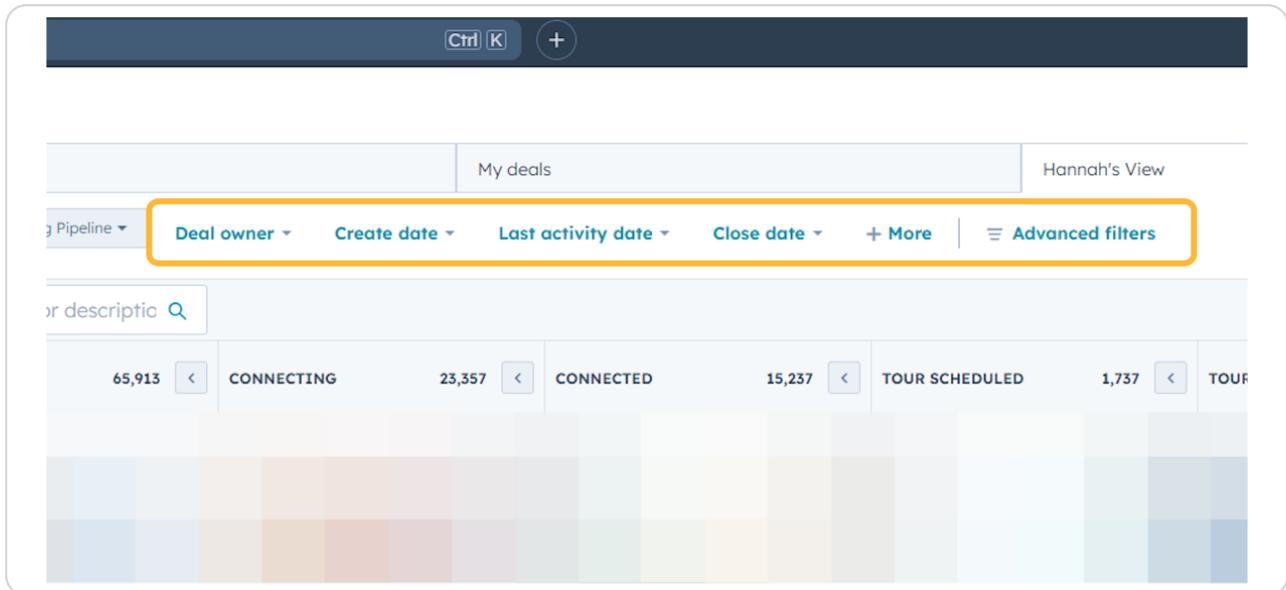
Note: If you do not save the view, all of your work for the Filters you've chosen will be lost.



STEP 13

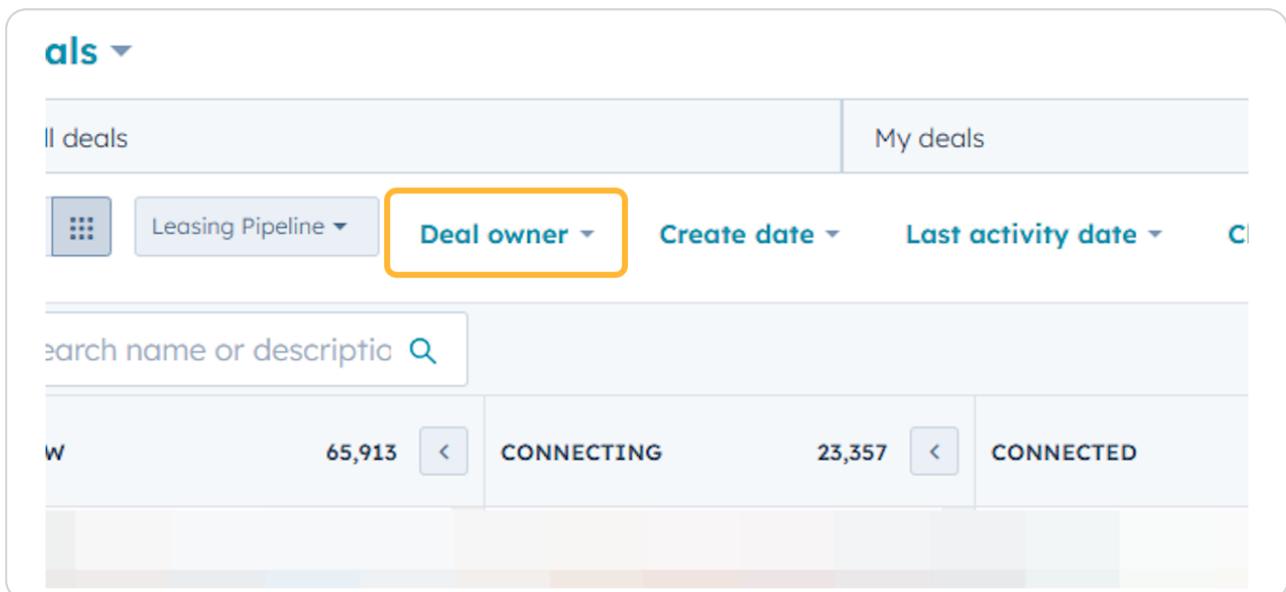
Underneath the Saved views, you'll find the Filters

You can easily filter on Deal owner, Create date, Last activity date, and More. If there's something else you'd like to Filter on, you'll be able to get that in the Advanced filters.



STEP 14

As an example, if you want to filter on Deals that are owned by you, Click the Deal owner dropdown



STEP 15

Check Me. This will help filter down Deals so you aren't distracted by anyone else's Deals in the system.

The screenshot shows a CRM interface with a search bar at the top left. A dropdown menu is open, showing a search bar and a list of names. The first item is highlighted with an orange box and contains the text "ynamically applied to the current user". Below the dropdown, there are three deal cards. The first card is for "Emily Harris" with details: "M Demo", "Service: Other", "Age: 11d/14d", and "Deal owner: Hannah Munoz". The second card is for "Demo Locations: James Davis" with details: "Location: Demo Locations", "Primary Service: Microblading", "Stage/Deal Age: 14d/14d", and "Deal owner: Hannah Munoz". The third card is for "Demo Locations: Jane Brown" with details: "Location: Demo Locations", "Primary Service: Multiple", "Stage/Deal Age: 14d/14d", and "Deal owner: Hannah Munoz". Each card has a "Slow" button and a "No activity for 14 days" warning.

STEP 16

If there's an element you want to filter on, but don't see it, Click Advanced filters

The screenshot shows a CRM interface with a view selector at the top. The view is set to "Hannah's View" with a close button and a "+ Add view" button. Below the view selector, there are three buttons: "+ More", "Clear quick filters", and "Advanced filters". The "Advanced filters" button is highlighted with an orange box. Below the buttons, there are three deal cards. The first card is for "Demo Locations: James Davis" with details: "Location: Demo Locations", "Primary Service: Microblading", "Stage/Deal Age: 14d/14d", and "Deal owner: Hannah Munoz". The second card is for "Demo Locations: Jane Brown" with details: "Location: Demo Locations", "Primary Service: Multiple", "Stage/Deal Age: 14d/14d", and "Deal owner: Hannah Munoz". The third card is for "Demo Locations: Laura Harris" with details: "Location: Demo Locations", "Primary Service: Microblading", "Stage/Deal Age: 6d/14d", and "Deal owner: Hannah Munoz". Each card has a "Slow" button and a "No activity for 14 days" warning.

STEP 17

This will allow you to filter on a multitude of items

For example here I am filtering on a Deal Stage

All Filters [X]

Quick filters Hide
These filters were set within the current table.

Deal owner: [Me X]

AND

Advanced Filters
This view doesn't have any advanced filters. Select a filter to begin.

Add filter
deal stage [X]

Deal Status

- Deal stage
- Deal Stage Entered
- Deal Stage Entered (Date)
- Deal Stage Name
- Deal Stage Name (CMS)

STEP 18

For this filter I can drill down to filter on a specific Deal Stage

Advanced Filters [X]

Group 1

Deal stage is any of (Leasing Pipeline)

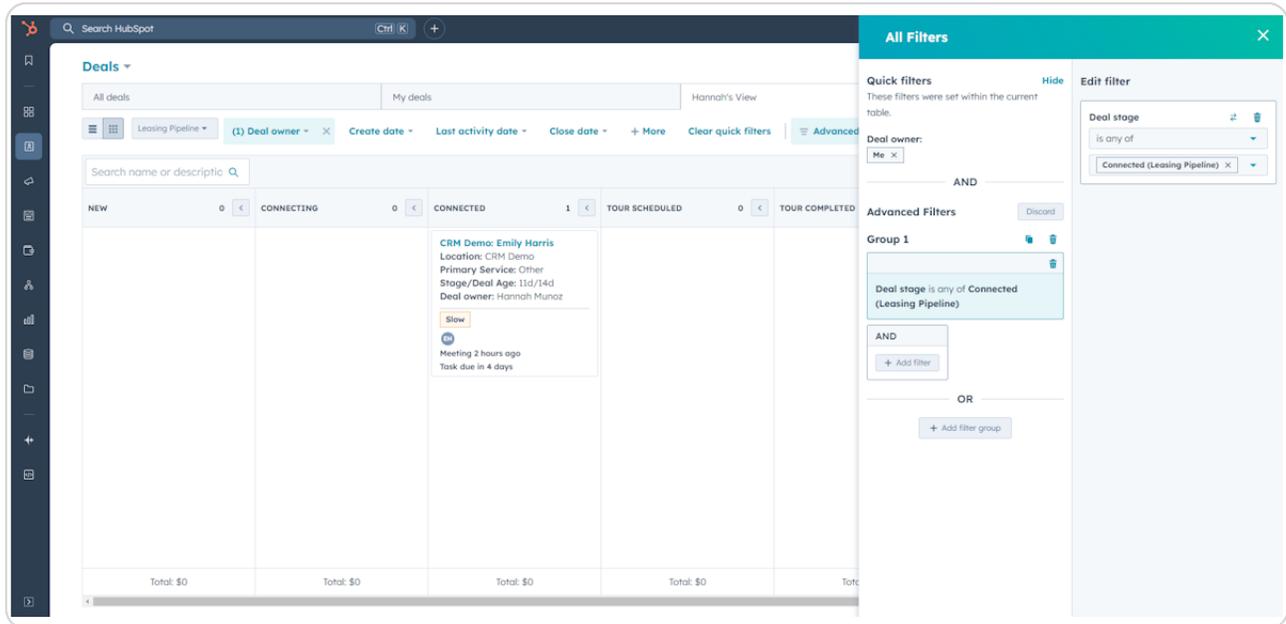
AND

+ Add filter

+ Add filter

STEP 19

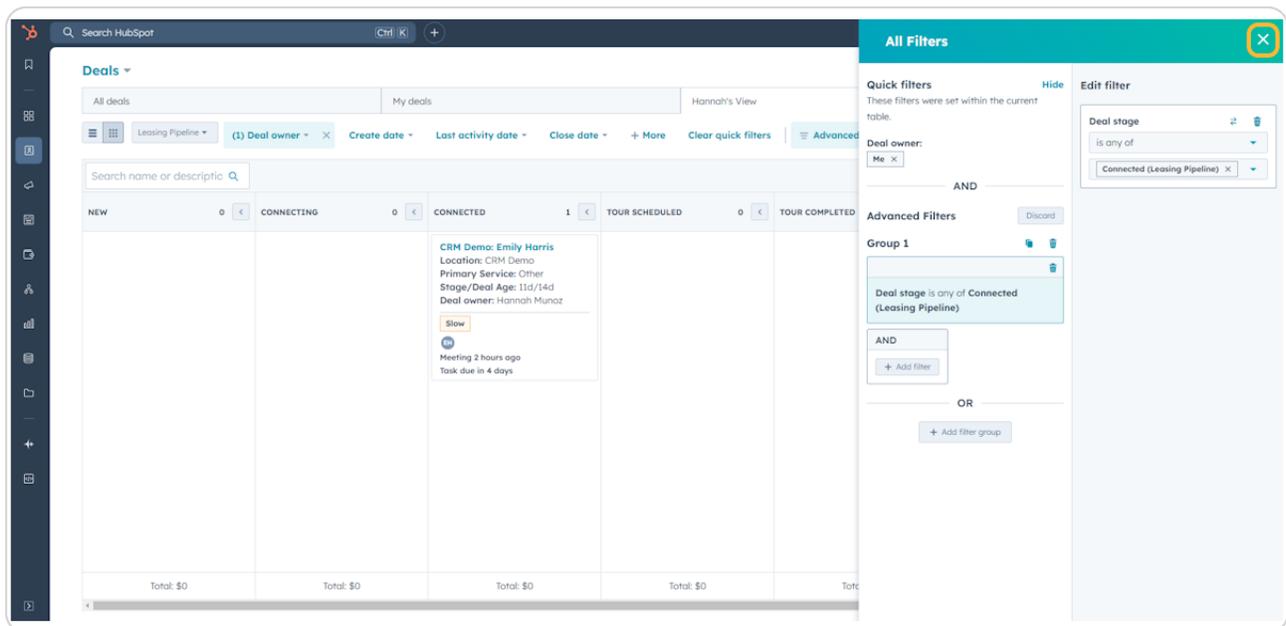
Adding this filter will automatically update your view



The screenshot shows the HubSpot Deals interface. The main view is a table with columns for deal stages: NEW (0), CONNECTING (0), CONNECTED (1), TOUR SCHEDULED (0), and TOUR COMPLETED (0). A deal card is visible in the 'CONNECTED' column for 'CRM Demo: Emily Harris'. The 'All Filters' panel on the right is open, showing 'Quick filters' with 'Deal owner: Me' and 'Advanced Filters' with 'Group 1' containing 'Deal stage is any of Connected (Leasing Pipeline)'. The 'Edit filter' section shows 'Deal stage' set to 'is any of' with 'Connected (Leasing Pipeline)' selected.

STEP 20

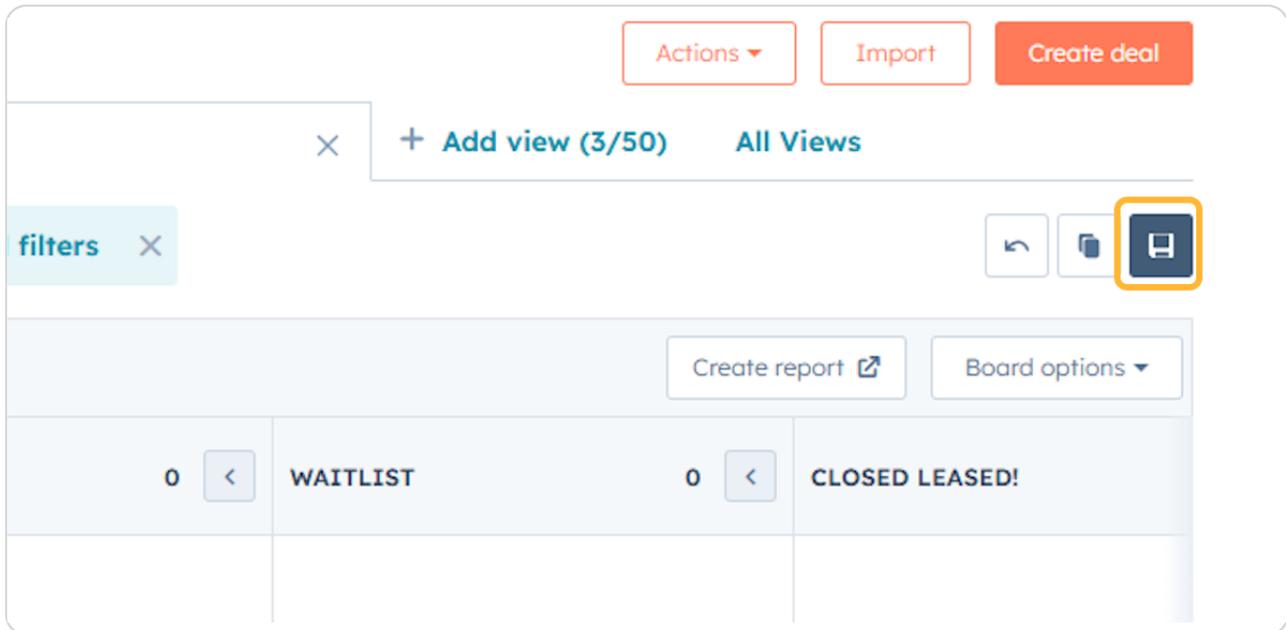
Once you've selected your filters, Click on the X



This screenshot is identical to the previous one, but the 'All Filters' panel is now closed. A red 'X' icon is highlighted in the top right corner of the panel's header, indicating the action to be taken to close it.

STEP 21

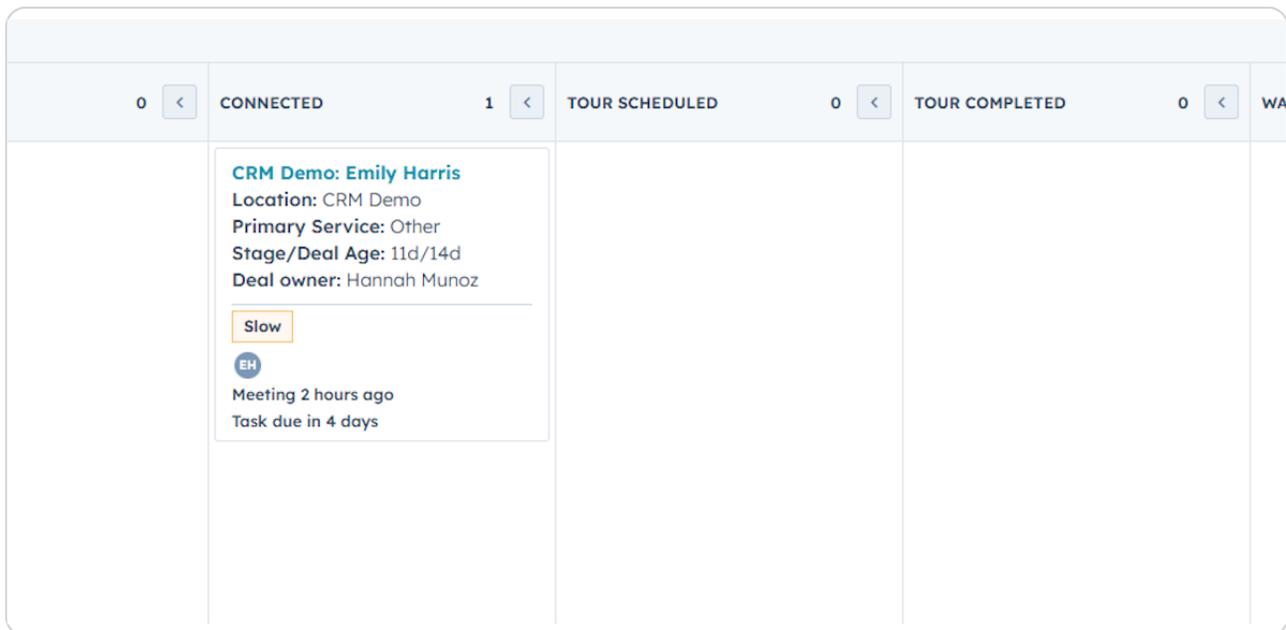
Don't forget to Click Save to lock your filters in place



The screenshot shows a CRM dashboard interface. At the top right, there are three buttons: 'Actions' (with a dropdown arrow), 'Import', and 'Create deal'. Below these, there is a '+ Add view (3/50)' button and 'All Views' text. A 'filters' tab is active on the left. On the right side of the filter area, there are three icons: a refresh icon, a copy icon, and a 'Save' icon (a document with a checkmark) which is highlighted with a yellow box. Below the filter area, there are two columns: 'WAITLIST' with a count of 0 and a left arrow, and 'CLOSED LEASED!' with a count of 0 and a left arrow. At the top right of the main content area, there are 'Create report' and 'Board options' buttons.

STEP 22

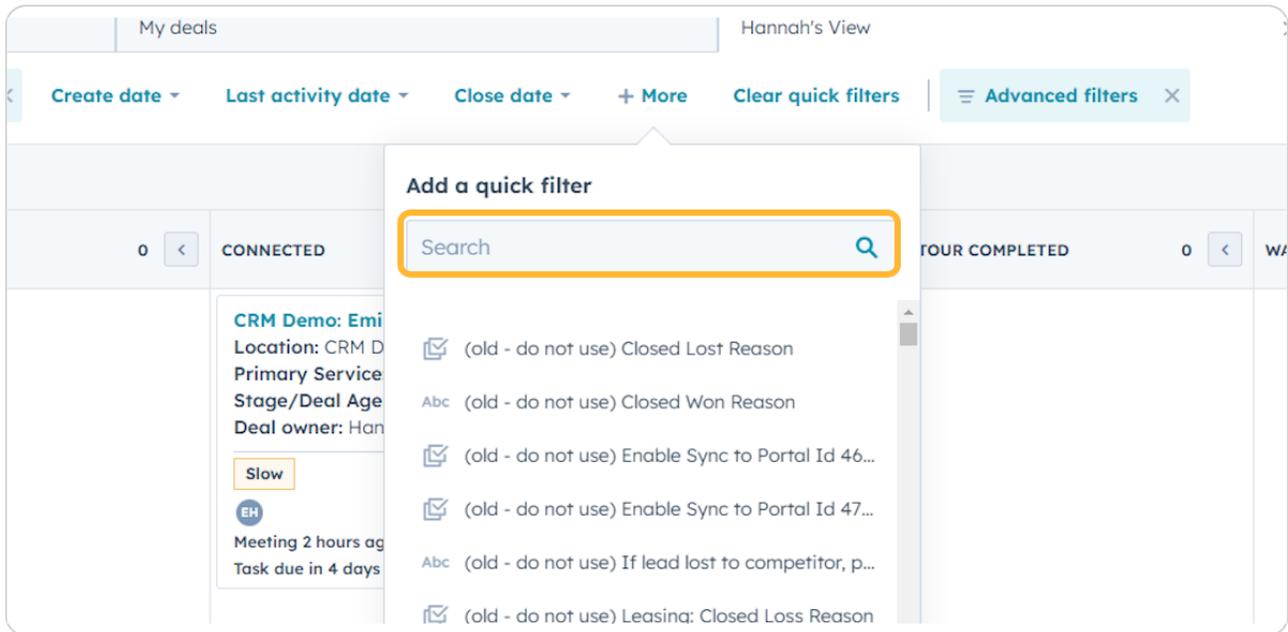
If you're looking for a quick Filter to add to the Filter lineup, Click +More



The screenshot shows a CRM dashboard with a grid of deal cards. The top row shows four columns: 'CONNECTED' (count 0, left arrow), 'TOUR SCHEDULED' (count 1, left arrow), 'TOUR COMPLETED' (count 0, left arrow), and 'WA' (count 0, left arrow). The 'CONNECTED' column contains a deal card for 'CRM Demo: Emily Harris'. The card details are: Location: CRM Demo, Primary Service: Other, Stage/Deal Age: 11d/14d, Deal owner: Hannah Munoz. Below the details, there is a 'Slow' status indicator, a profile icon for 'EH', and two tasks: 'Meeting 2 hours ago' and 'Task due in 4 days'.

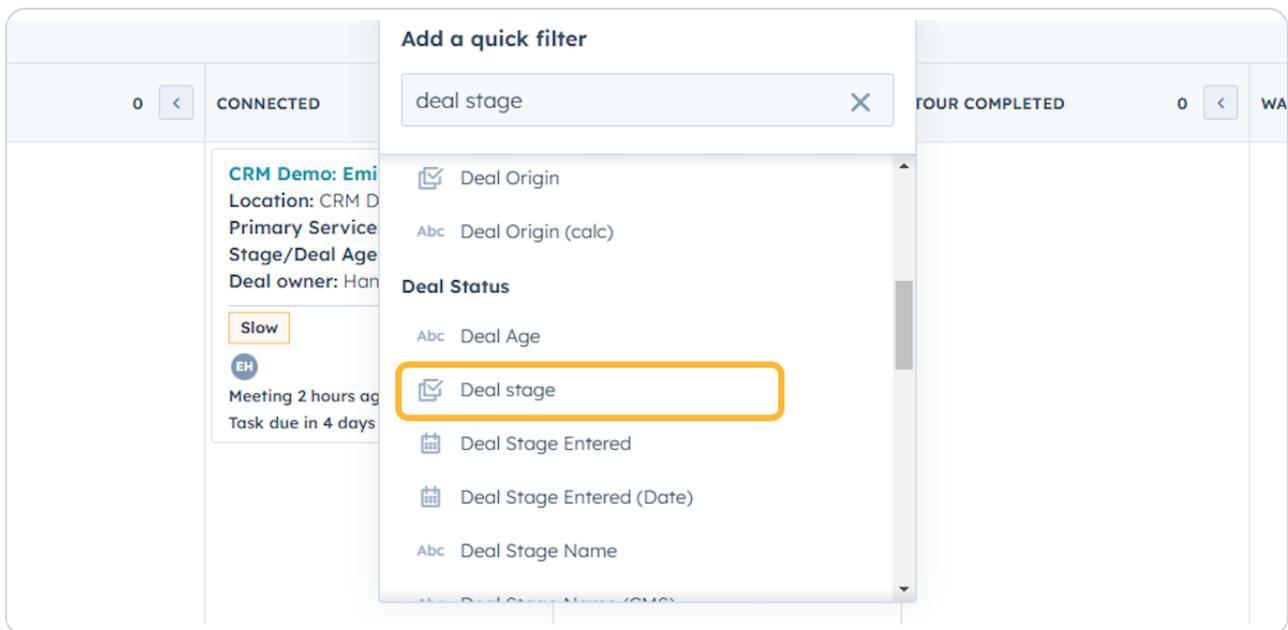
STEP 23

Search for the Filter



STEP 24

Click on the Filter you want



STEP 25

The Filter will be added to the bar and you can Filter from there

