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

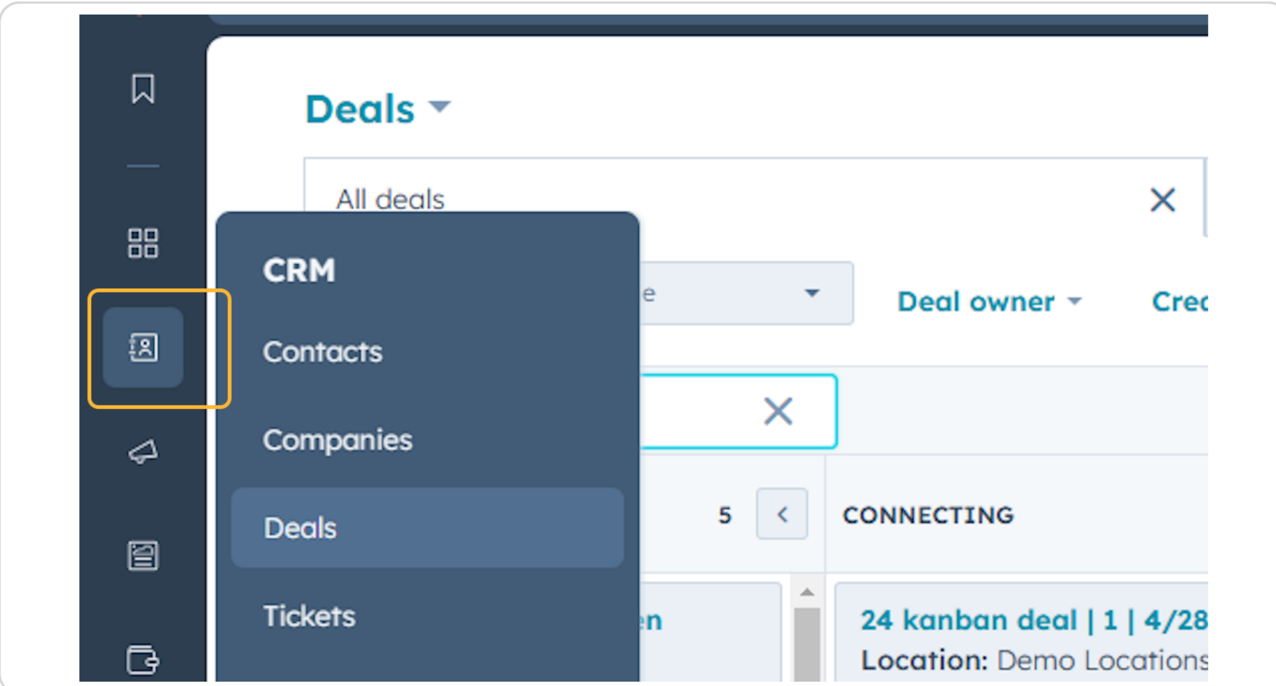
Created by	Creation Date	Last Updated
Doug Davidoff	Dec 04, 2024	Jan 24, 2025

Jump into HubSpot

25 Steps

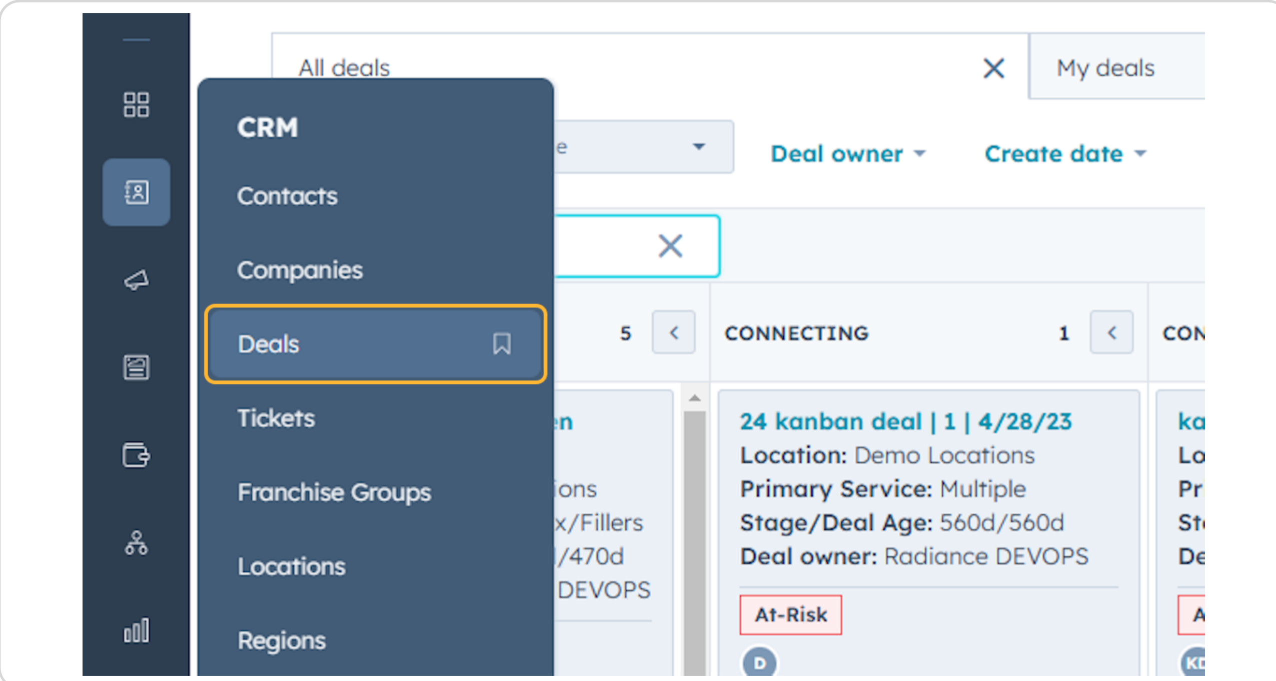
STEP 1

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



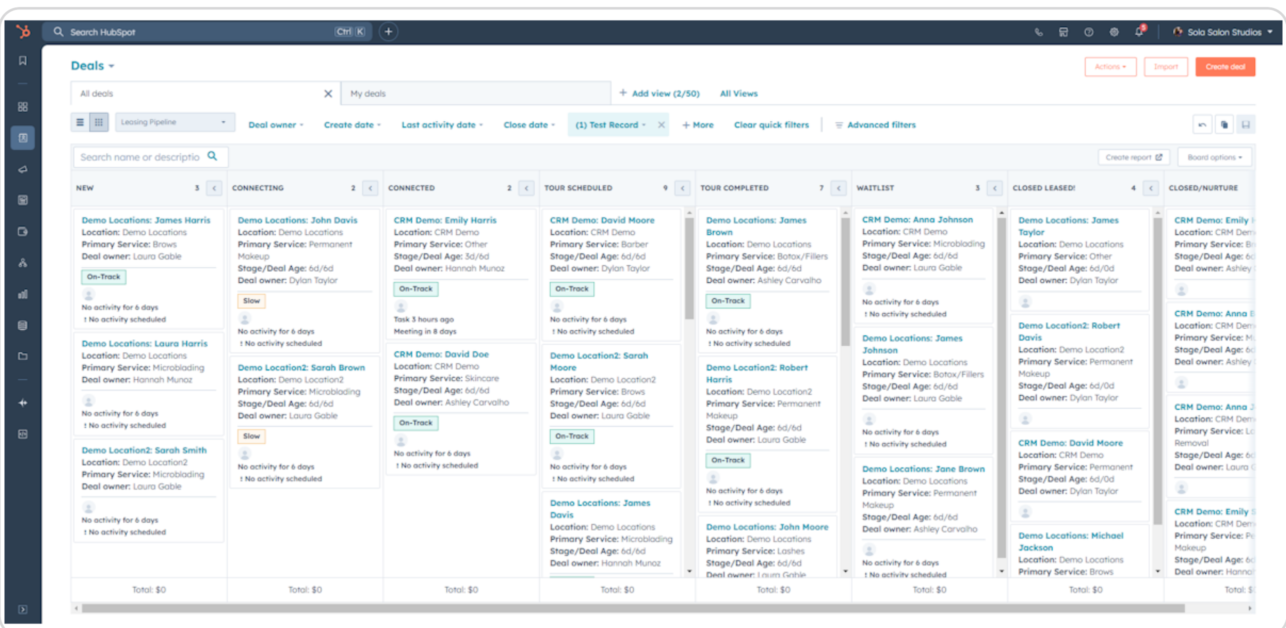
STEP 2

Click on Deals



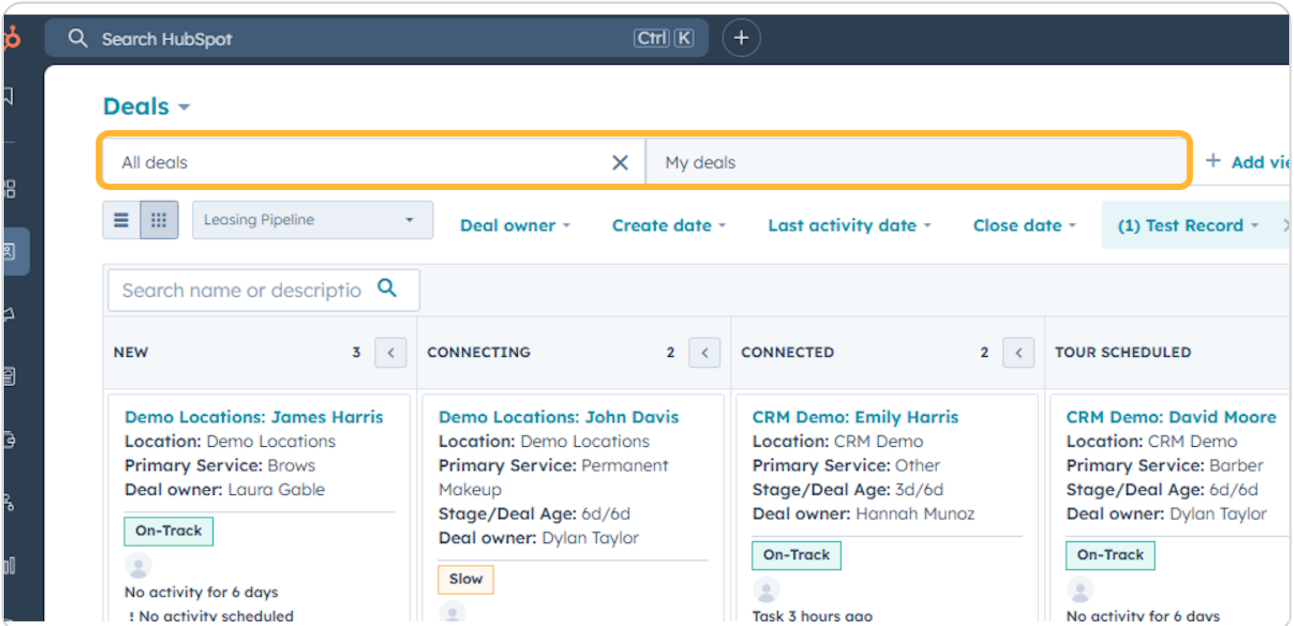
STEP 3

You'll be brought to the Deal overview



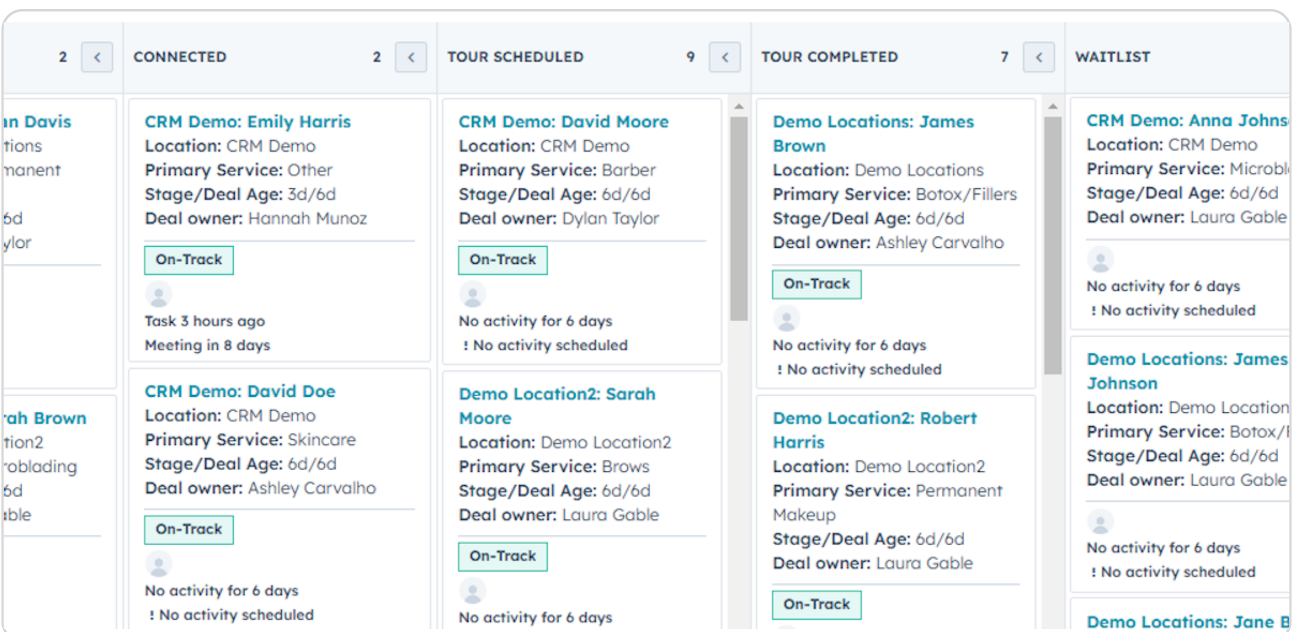
STEP 4

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



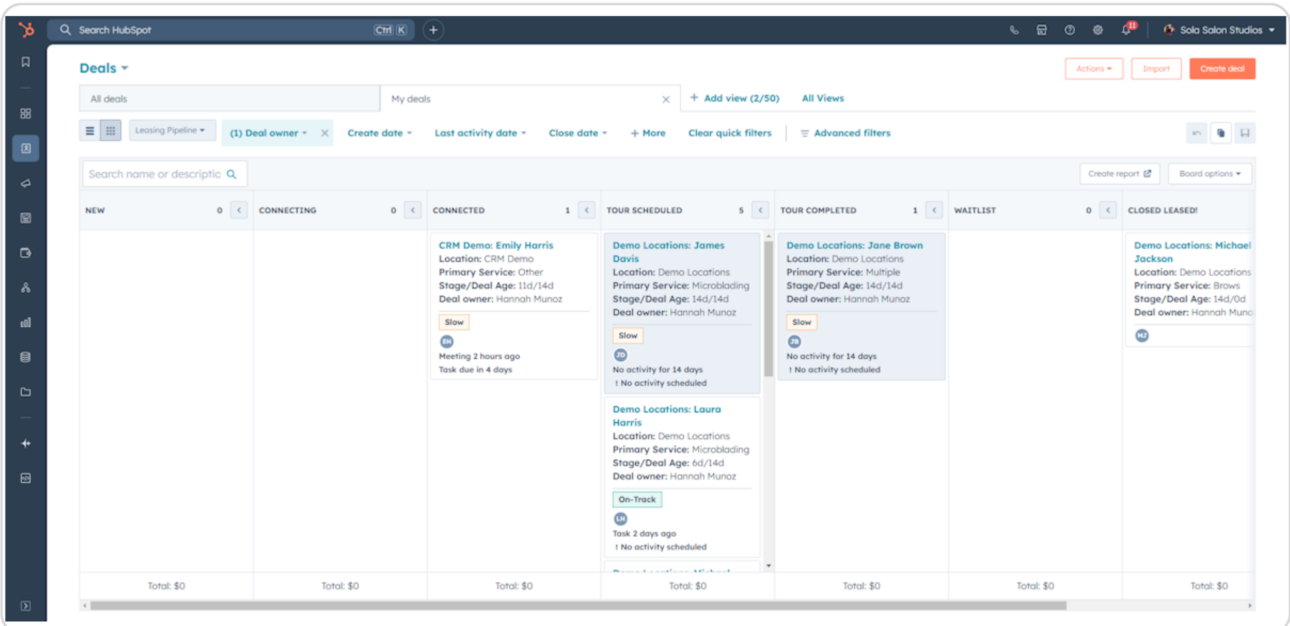
STEP 5

For example, Click on My deals



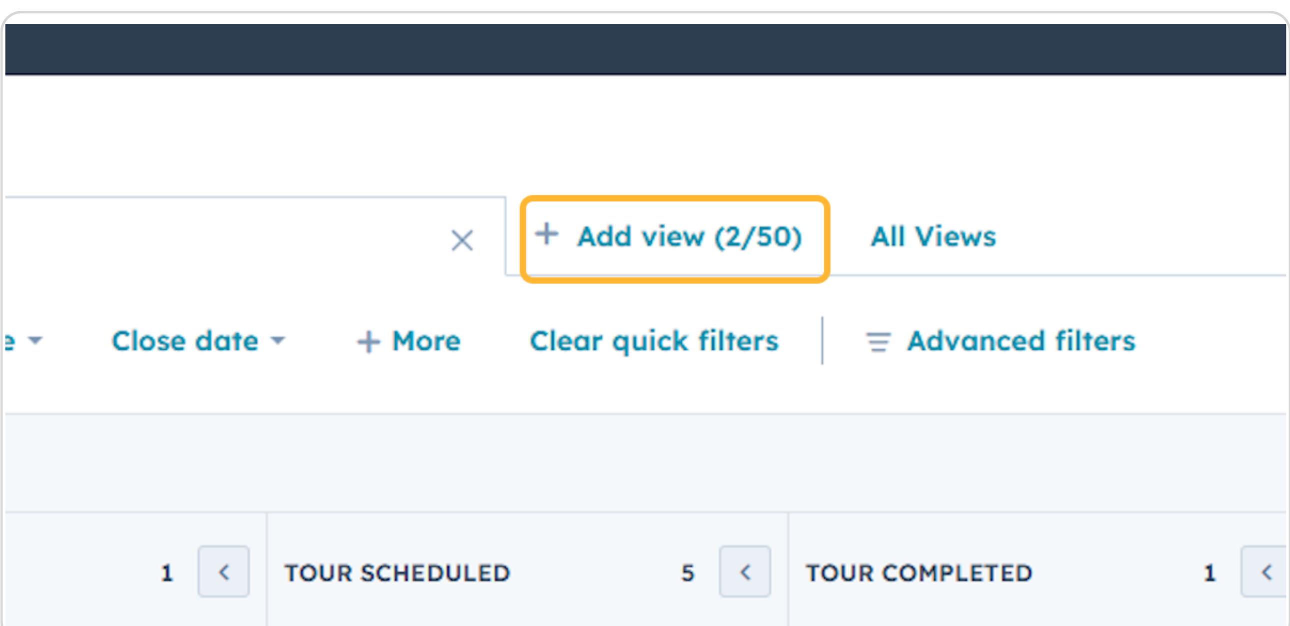
STEP 6

<u>**This view will show all the Deals where you are the Deal owner**</u>



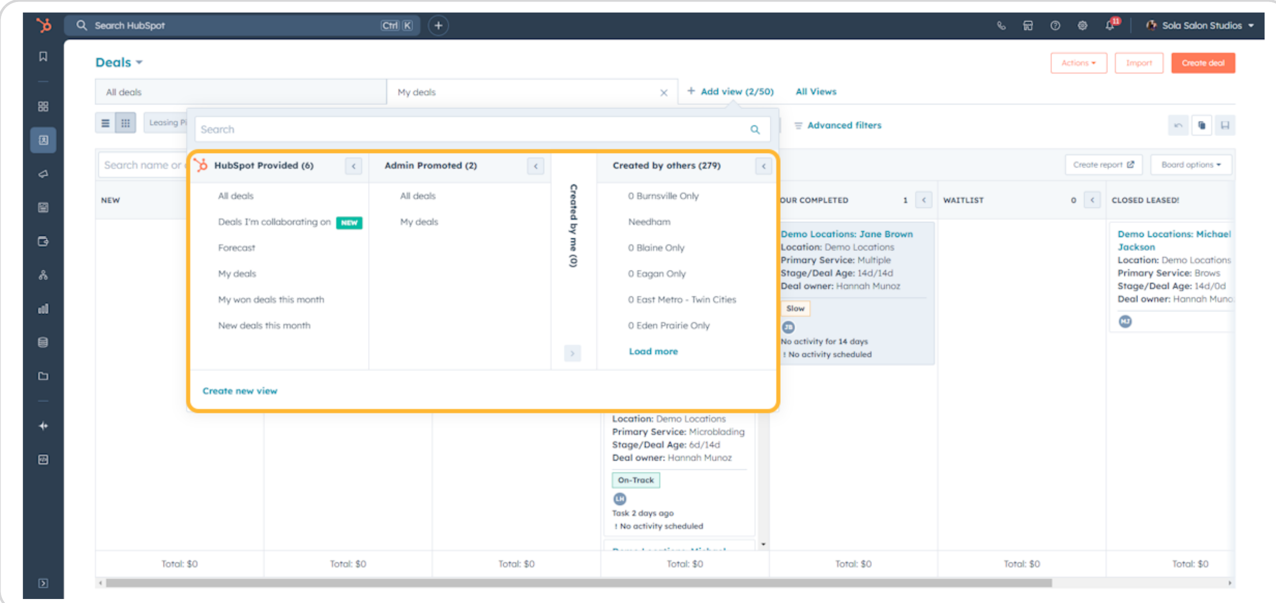
STEP 7

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



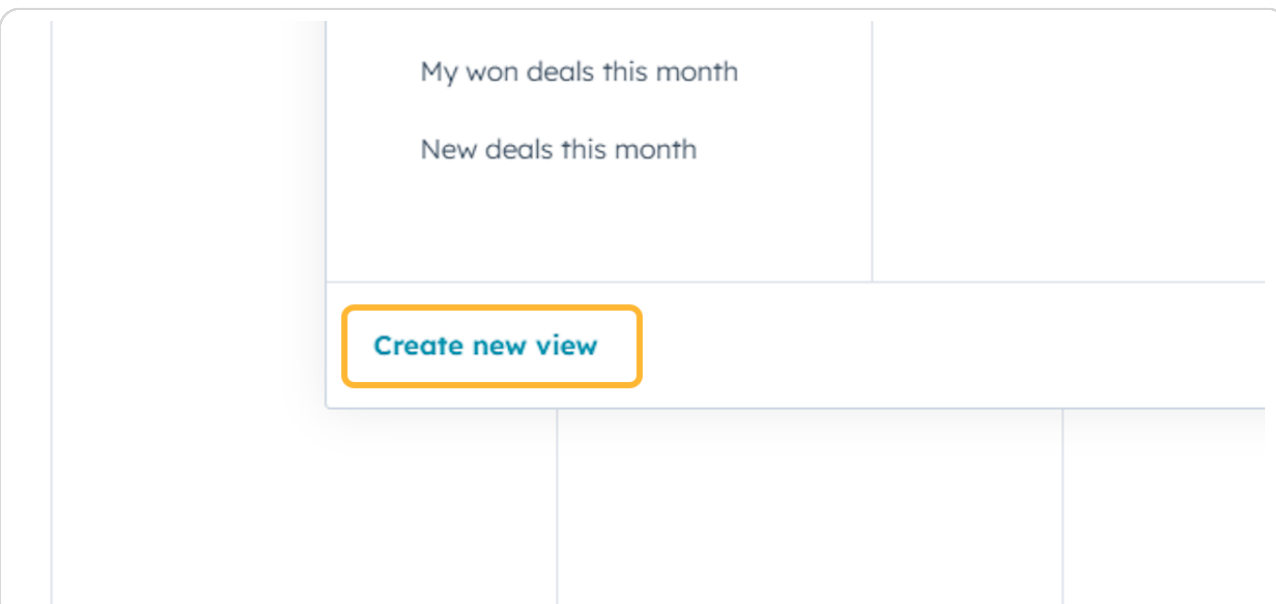
STEP 8

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

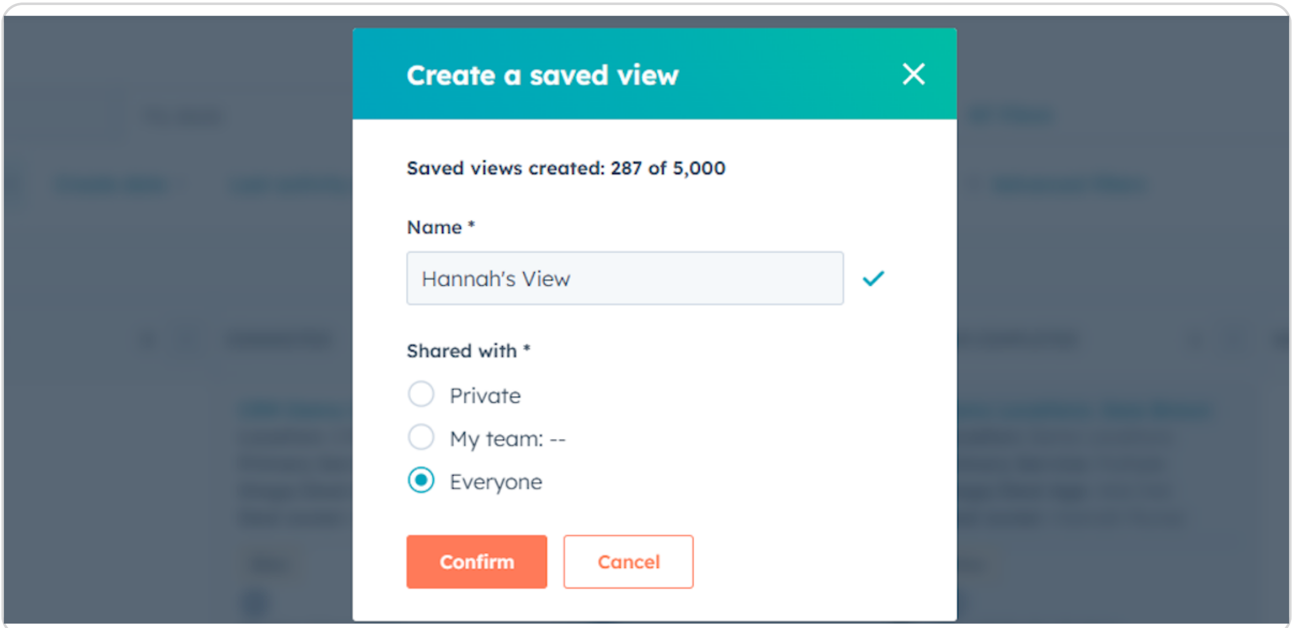
To create a new view, Click Create new view



STEP 10

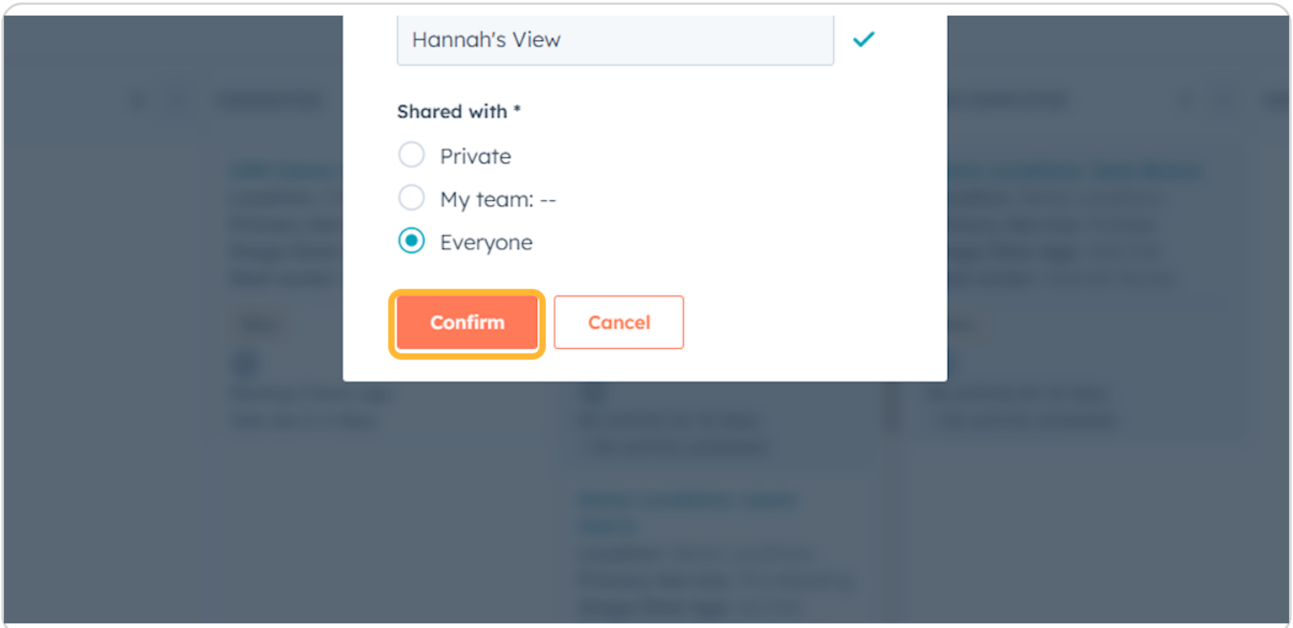
Add a Name and who the view is Shared with

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



STEP 11

Click Confirm

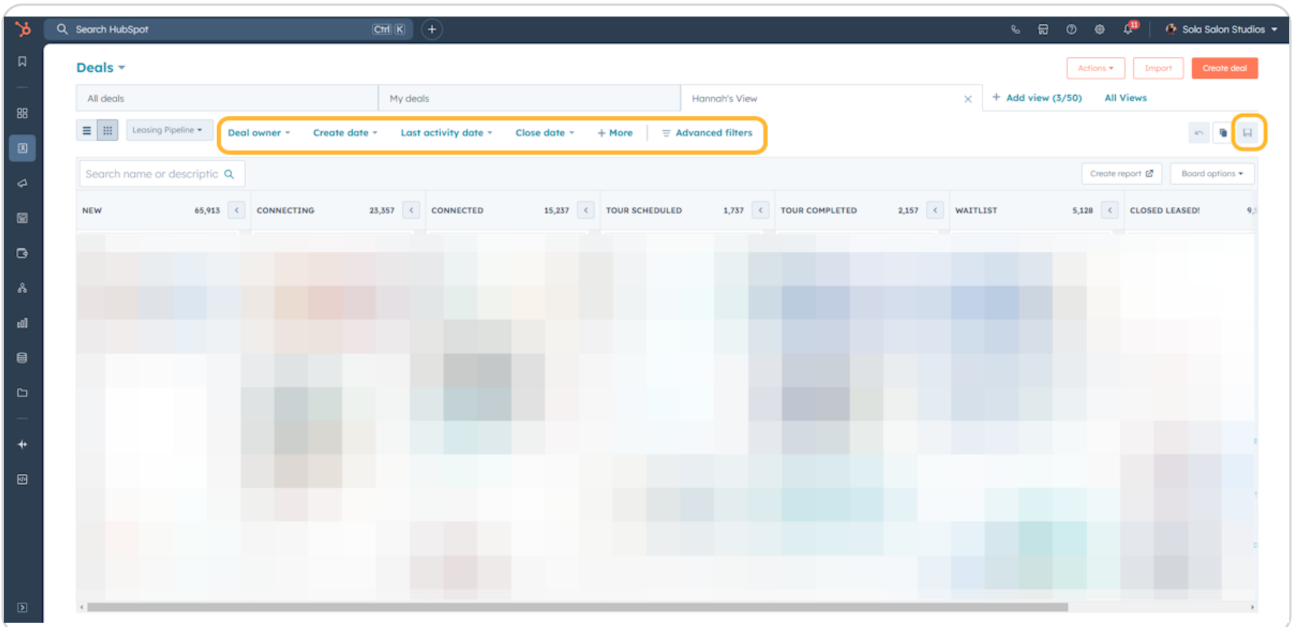


STEP 12

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.

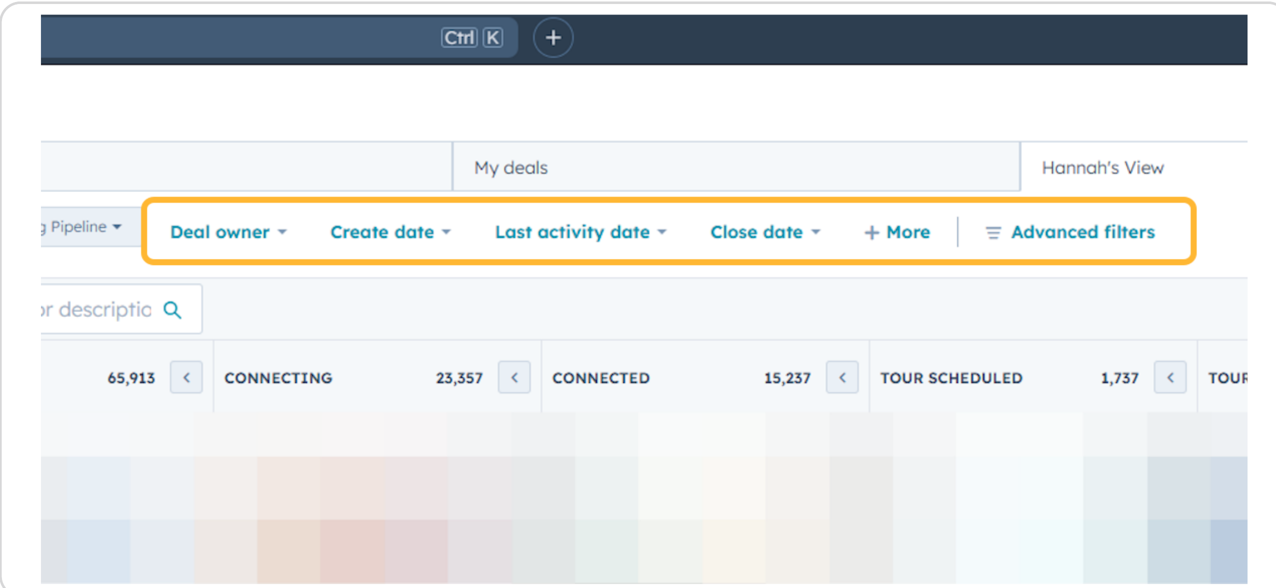


LIFT Enablement

STEP 13

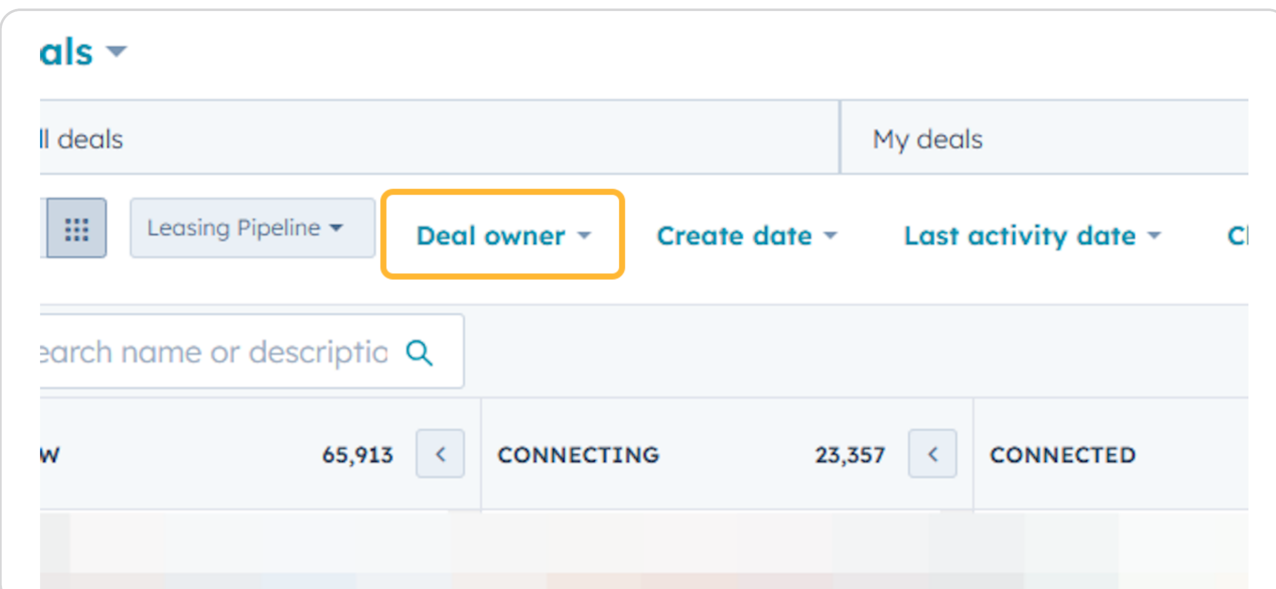
Underneath the Saved views, you'll find the Filters

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.



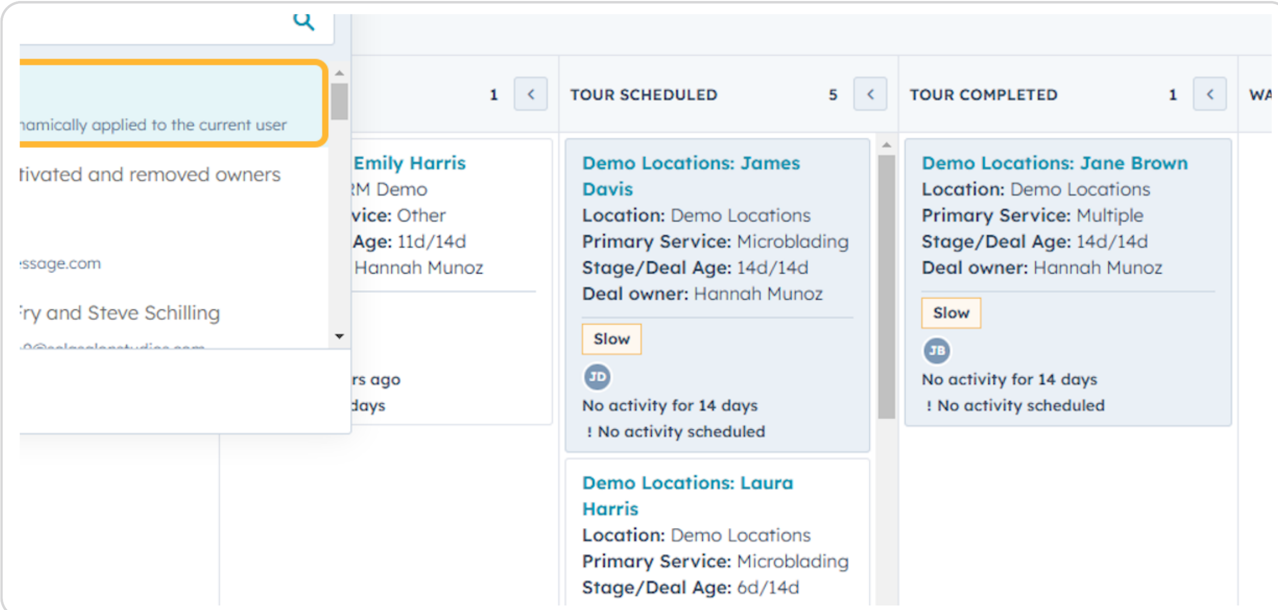
STEP 14

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



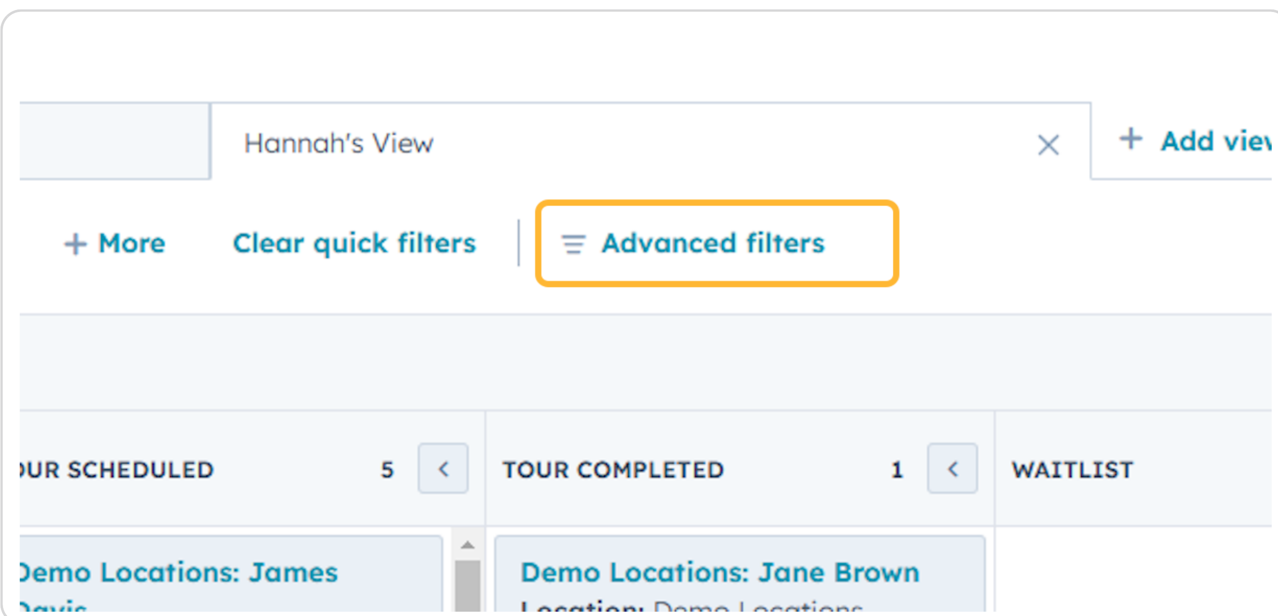
STEP 15

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



STEP 16

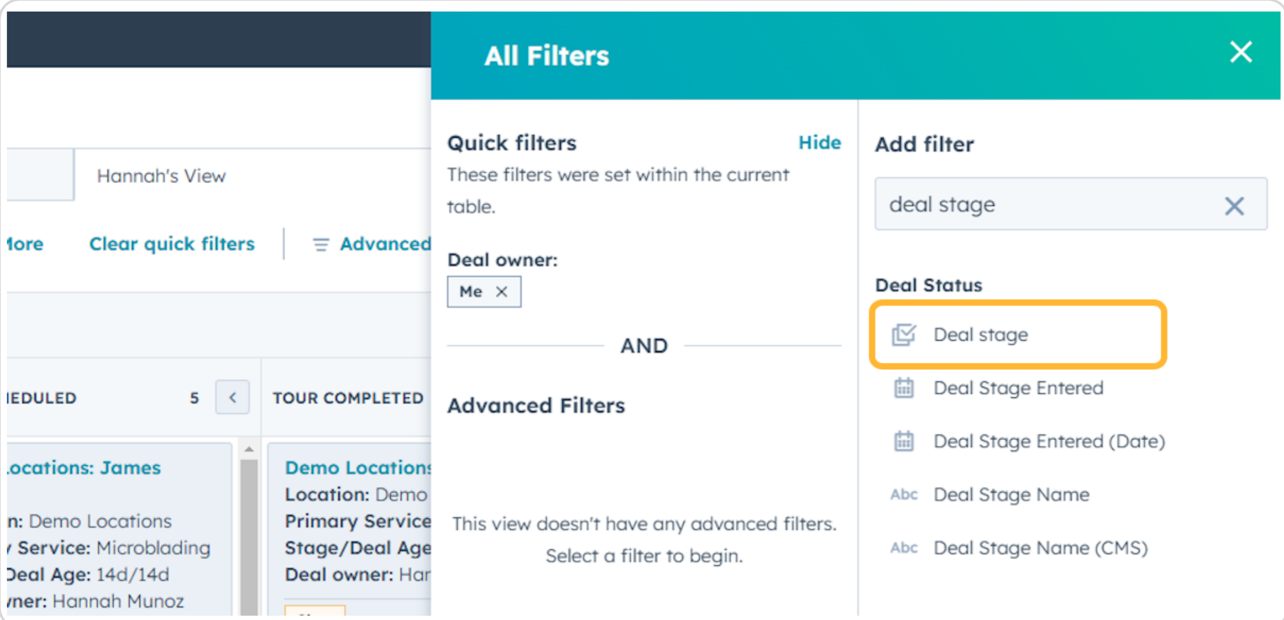
If there's an element you want to filter on, but don't see it, Click Advanced filters



STEP 17

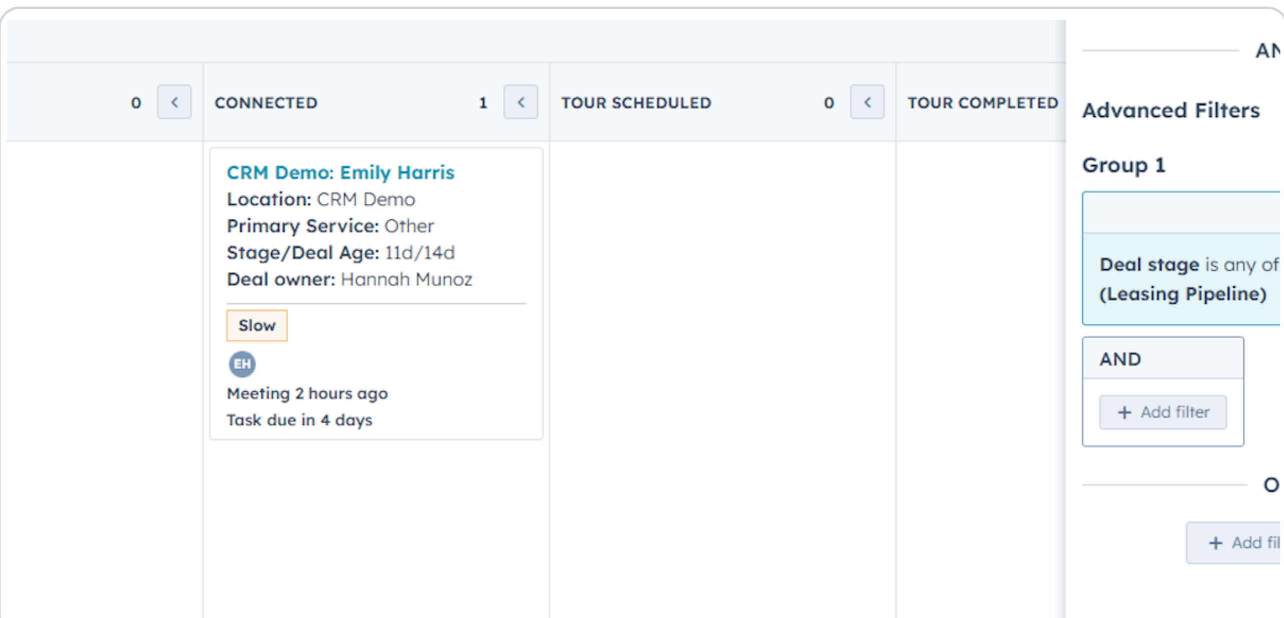
This will allow you to filter on a multitude of items

For example here I am filtering on a Deal Stage



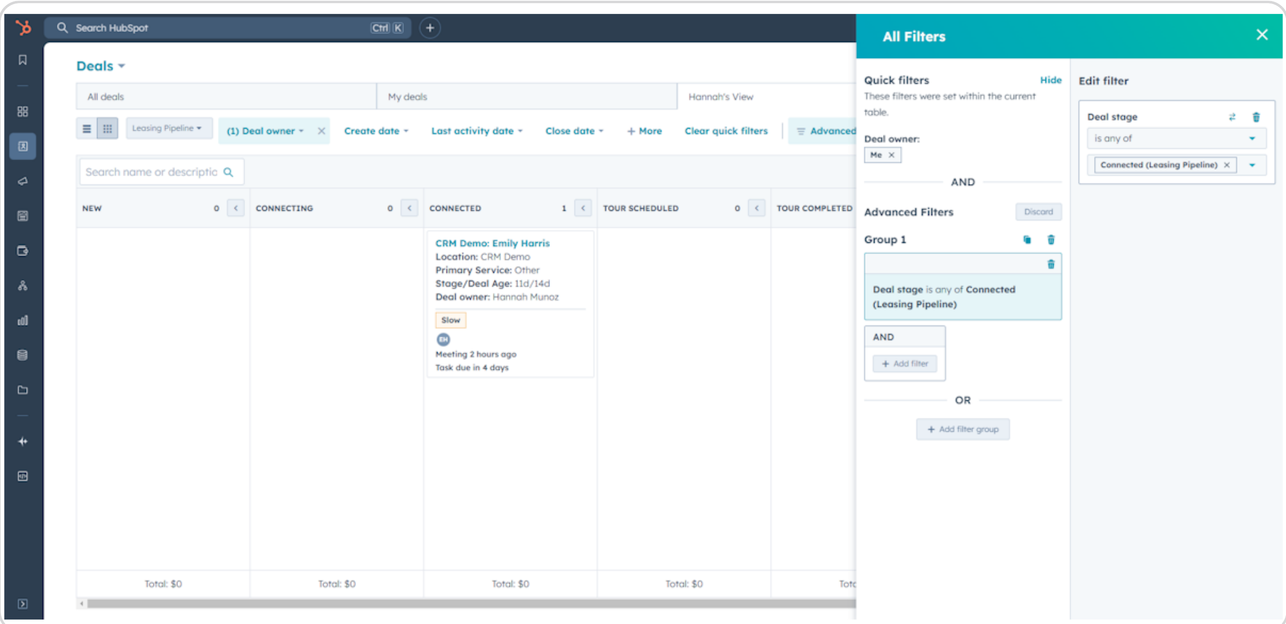
STEP 18

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



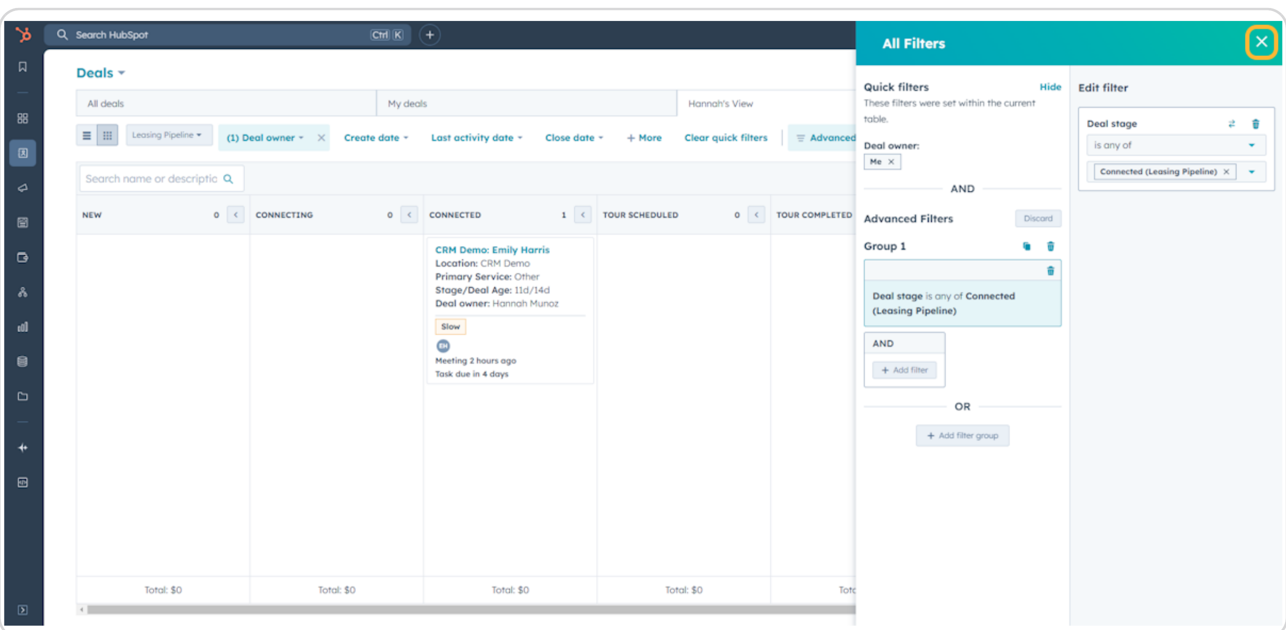
STEP 19

Adding this filter will automatically update your view



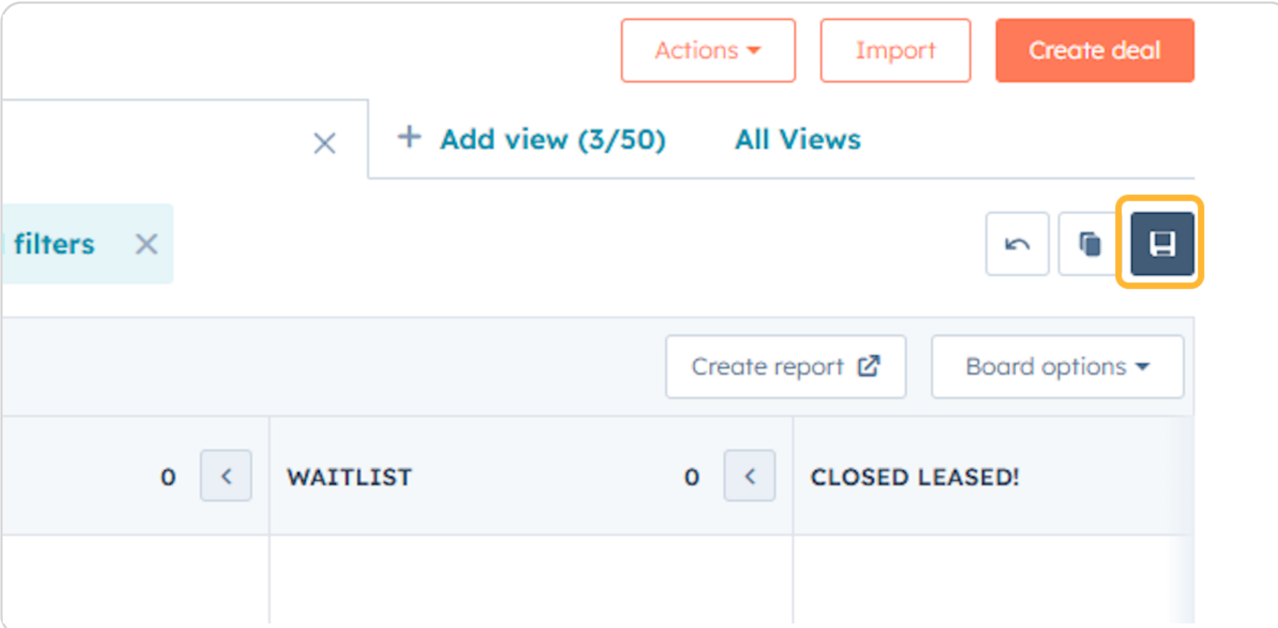
STEP 20

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



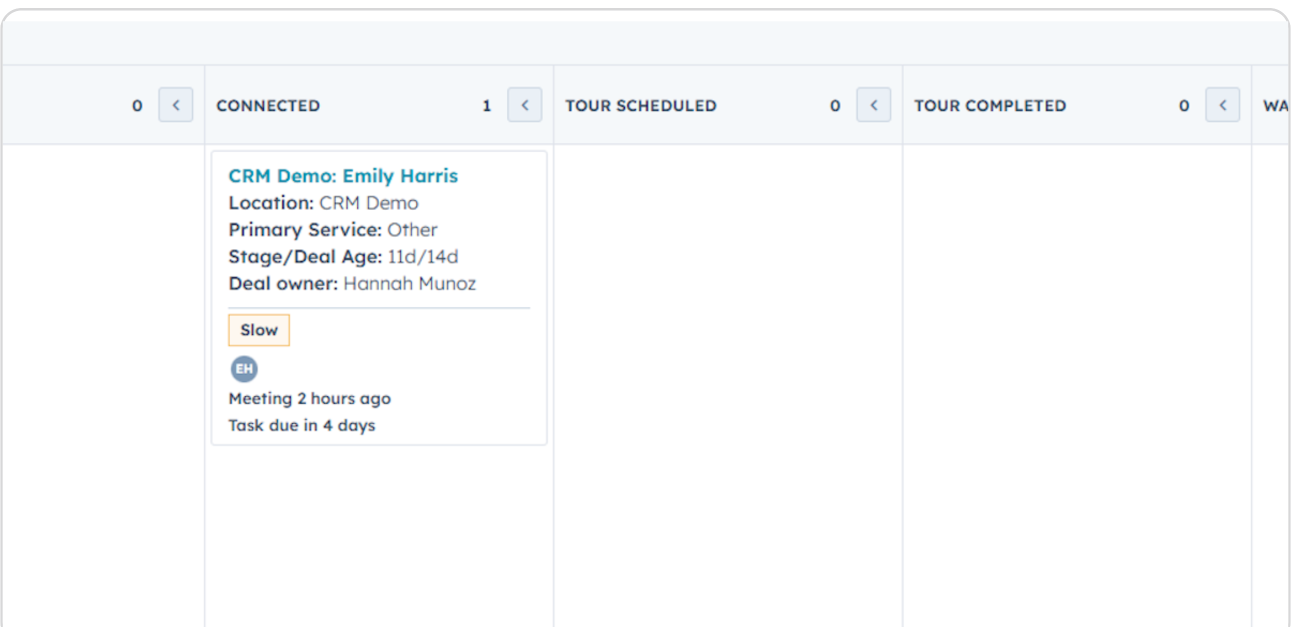
STEP 21

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



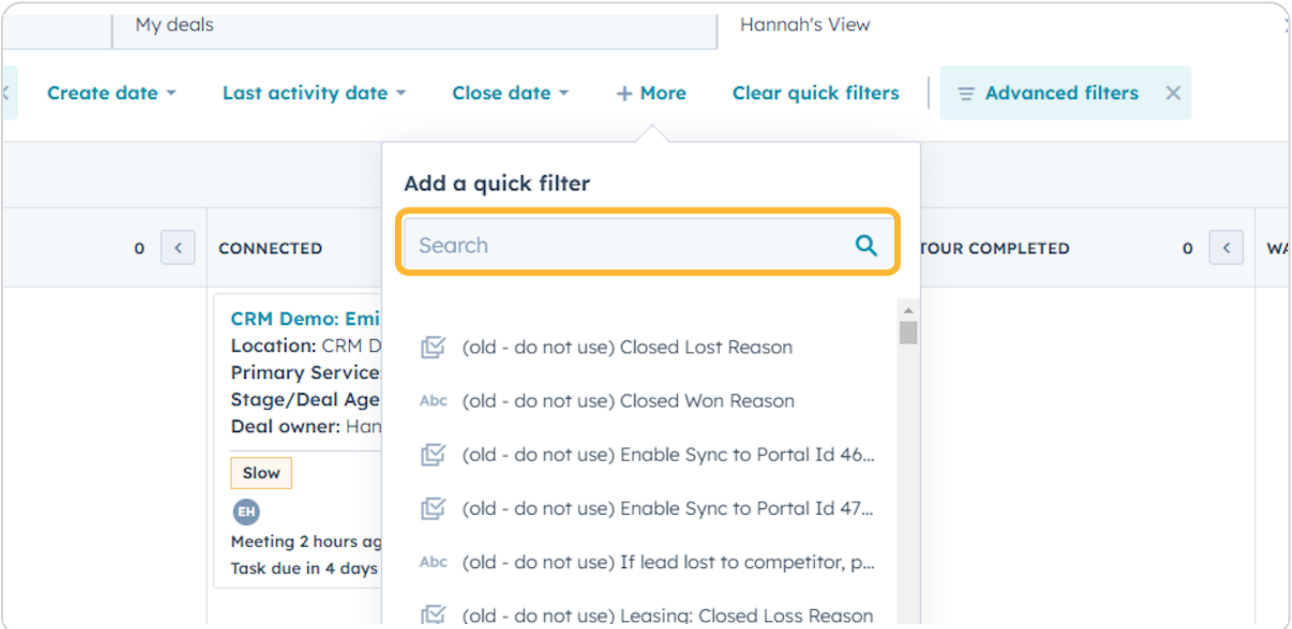
STEP 22

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



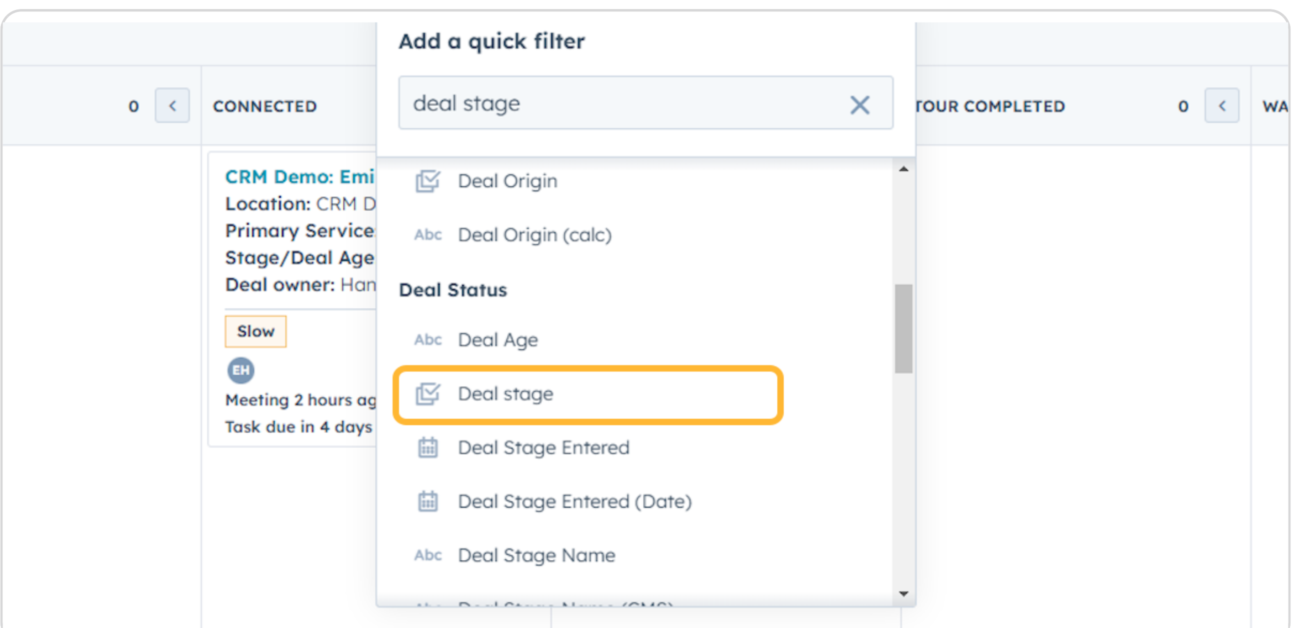
STEP 23

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