

Sola Salon Studios - Logging Activity - Quick Action Buttons for Leaving Notes, Creating Tasks and More

In any HubSpot record, there are buttons at the top of both the top of the preview of a record and the record itself. These buttons are used for outreach and making sure actions are logged to HubSpot. This guide will walk through the action buttons including:

- Creating notes
- Creating tasks
- Scheduling a meeting

43 Steps [View most recent version](#) 

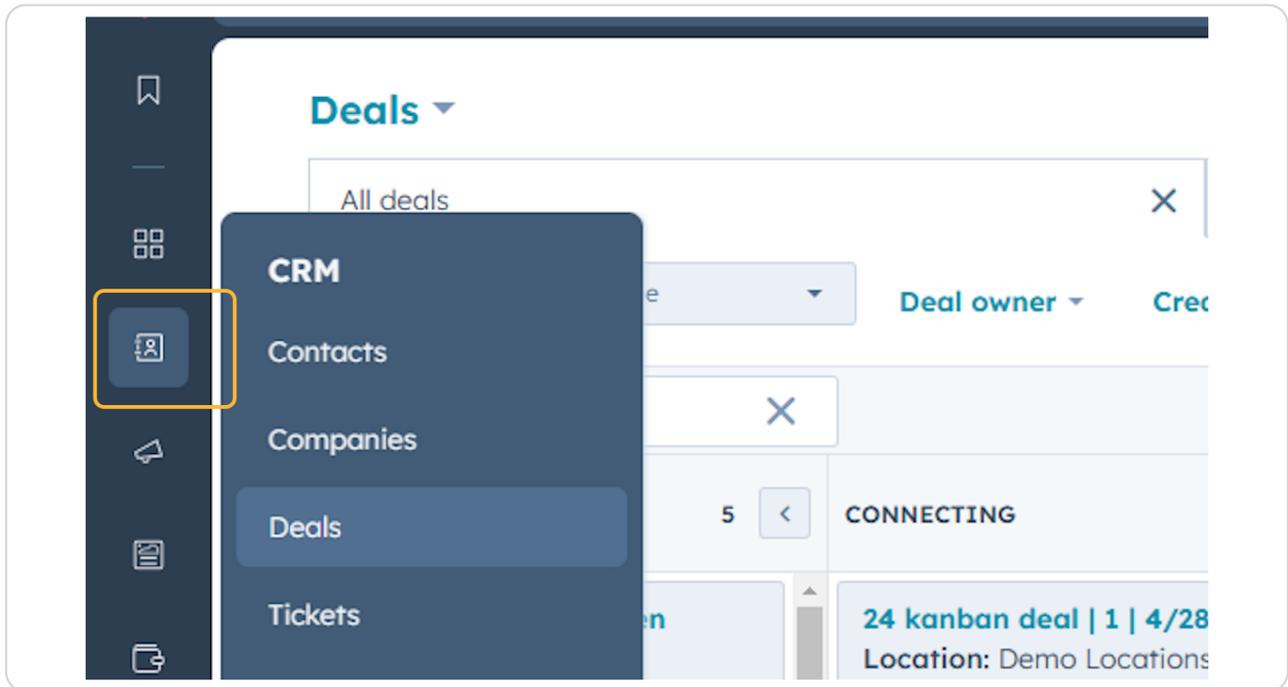
Created by	Creation Date	Last Updated
Doug Davidoff	Dec 04, 2024	Jan 17, 2025

Accessing a Record in HubSpot

6 Steps

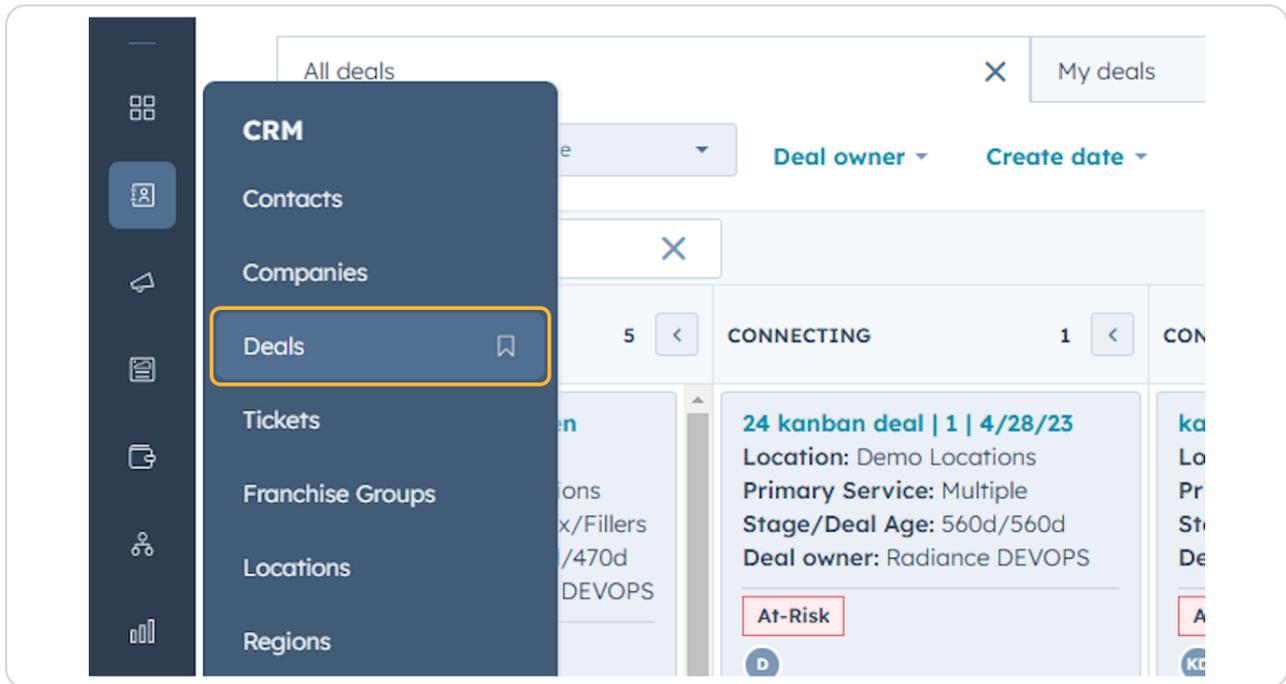
STEP 1

Navigate to the left-hand side and go to the CRM menu item



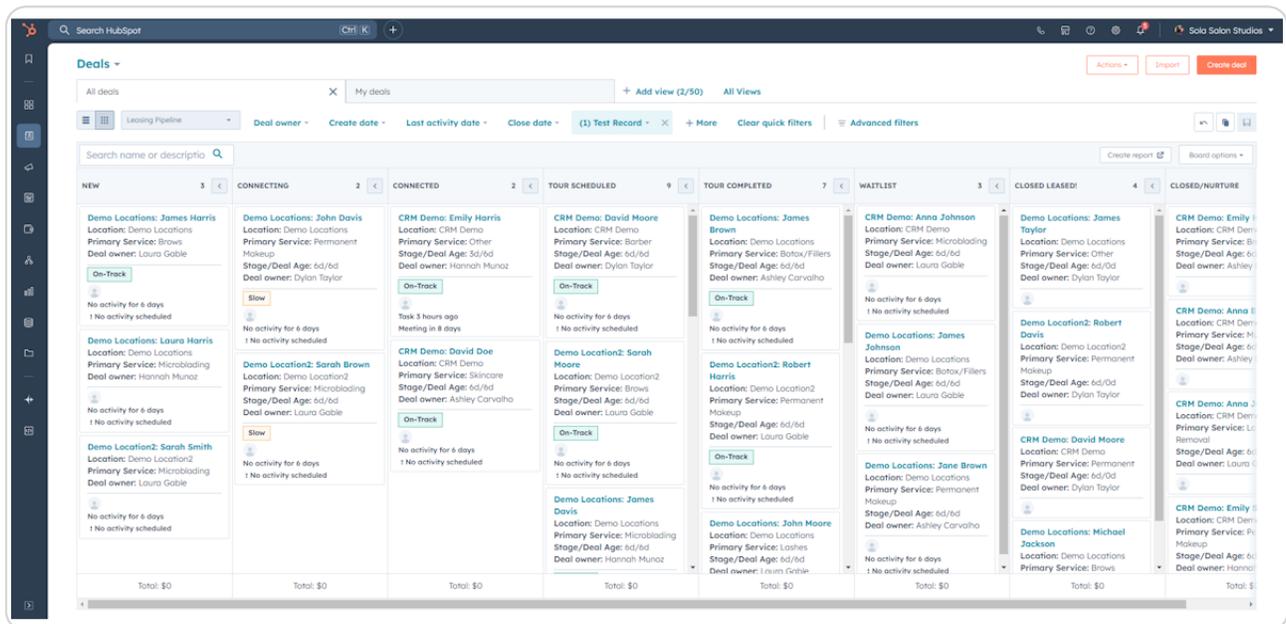
STEP 2

Click on Deals



STEP 3

This will take you to the Deal overview



STEP 4

Search for a Deal

The screenshot displays a CRM dashboard with four columns representing deal stages: CONNECTED (2 deals), TOUR SCHEDULED (9 deals), TOUR COMPLETED (7 deals), and WAITLIST. Each deal card includes the following information:

- Deal Name:** CRM Demo: Emily Harris, CRM Demo: David Moore, Demo Locations: James Brown, CRM Demo: Anna Johnson, CRM Demo: David Doe, Demo Location2: Sarah Moore, Demo Location2: Robert Harris, Demo Locations: James Johnson, CRM Demo: Anna Johnson.
- Location:** CRM Demo, Demo Locations, Demo Location2.
- Primary Service:** Other, Barber, Botox/Fillers, Microblading, Permanent Makeup, Skincare, Brows.
- Stage/Deal Age:** 3d/6d, 6d/6d.
- Deal owner:** Hannah Munoz, Dylan Taylor, Ashley Carvalho, Laura Gable.
- Status:** On-Track, Slow.
- Activity:** Task 3 hours ago, Meeting in 8 days, No activity for 6 days, No activity scheduled.

STEP 5

Click on the Deal Card

This screenshot shows the same CRM dashboard as in Step 4, but with a specific deal card highlighted in orange. The highlighted deal is:

- Deal Name:** Demo Locations: Laura Harris
- Location:** Demo Locations
- Primary Service:** Microblading
- Deal owner:** Hannah Munoz
- Status:** On-Track
- Activity:** No activity for 6 days, No activity scheduled

STEP 6

A Deal Card Preview will appear. At the top of this card there will be a string of buttons where you can create a note, create a task, and create a meeting.

The screenshot displays the HubSpot CRM interface. On the left, a deals pipeline is visible with columns for 'NEW', 'CONNECTING', 'CONNECTED', 'TOUR SCHEDULED', 'TOUR COMPLETED', and 'WAITLIST'. Each column contains deal cards for various demo locations, such as 'Demo Locations: James Harris' and 'CRM Demo: Emily Harris'. Each deal card shows details like location, primary service, stage, deal age, and deal owner, along with an 'On-Track' status and activity scheduling options.

On the right, a 'Deal Card Preview' for 'Demo Locations: Laura Harris' is shown. At the top of this preview, there is a row of action buttons: 'Note', 'Email', 'Call', 'Task', 'Meeting', and 'More'. Below these buttons, the deal summary includes the deal stage ('New'), deal age ('6d/6d'), location ('Demo Locations'), contact ('Laura Harris'), and tour date ('Schedule Now'). The preview also shows the deal owner ('Hannah Munoz') and a 'Need help? Click here.' link.

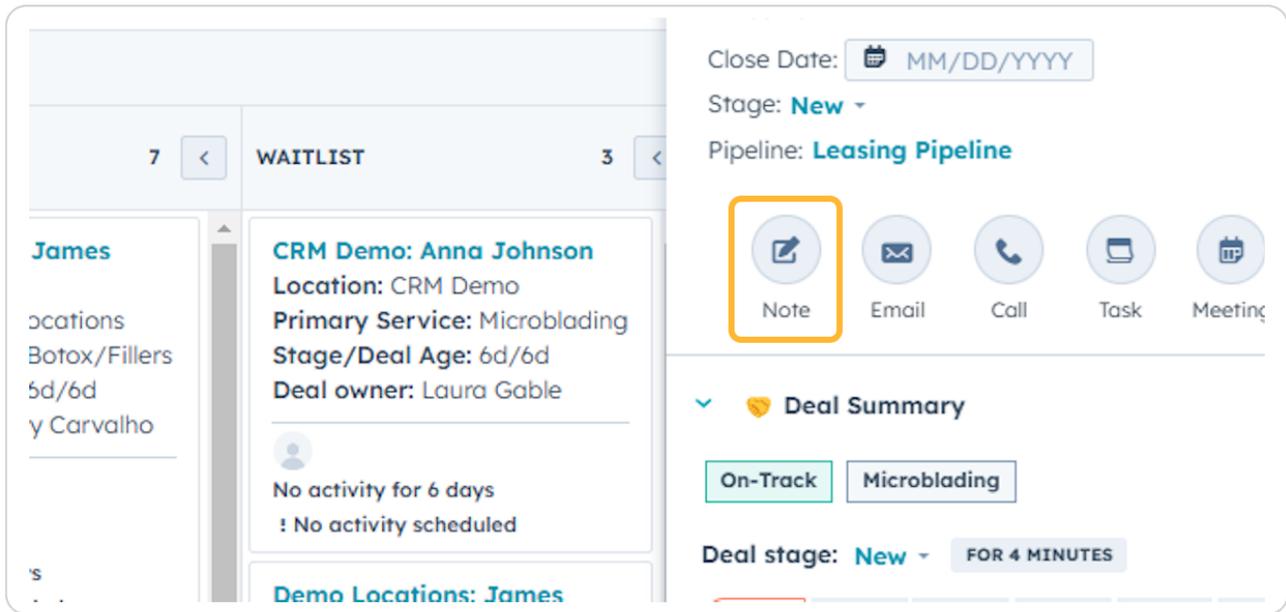
Creating a Note

5 Steps

Creating notes are great for logging important information or context to a specific record

STEP 7

Click on Create a note

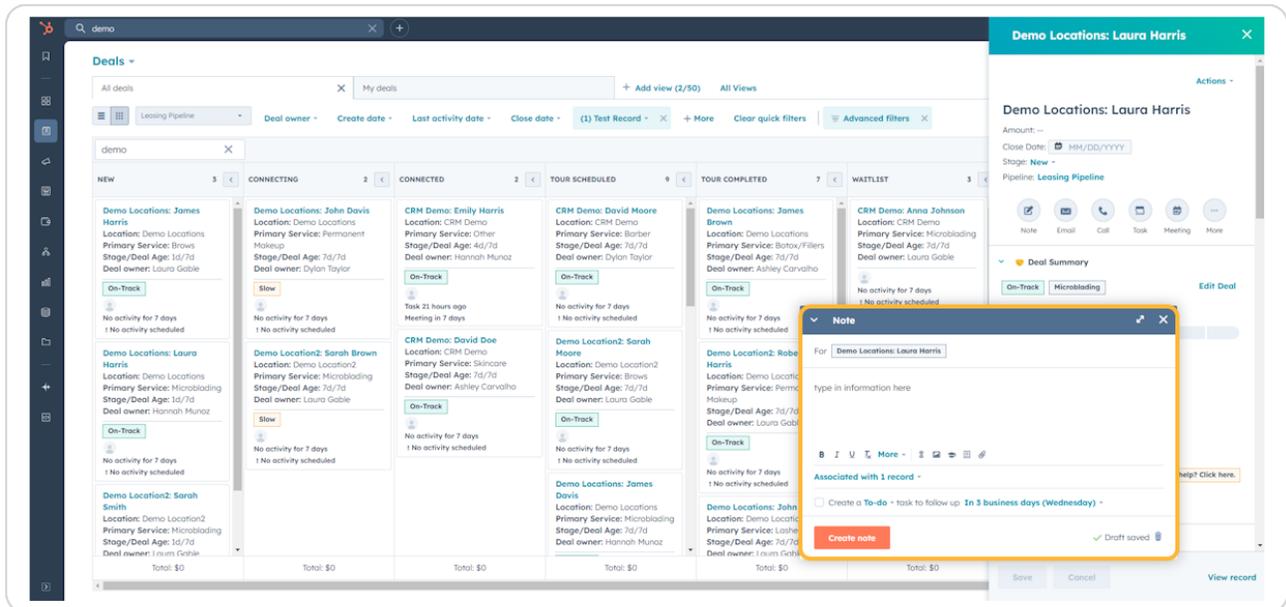


The screenshot shows a CRM interface for a deal in the 'WAITLIST' stage. The deal is for 'CRM Demo: Anna Johnson' with a primary service of 'Microblading'. The deal owner is 'Laura Gable'. The deal has been on track for 6 days with no activity scheduled. A 'Note' button is highlighted with an orange box. Other action buttons include 'Email', 'Call', 'Task', and 'Meeting'. The deal summary shows 'On-Track' and 'Microblading' with a 'Deal stage: New' and a 'FOR 4 MINUTES' indicator.

STEP 8

Type information into the body of the note

Note: You can style the text in the note and add any files, links, images, etc. that are relevant/necessary to include.



The screenshot shows a CRM interface with a deal list. A 'Note' modal is open over the deal 'Demo Locations: Laura Harris'. The modal contains a text input field for the note body, a rich text editor toolbar, and a 'Create note' button. The deal list shows various deals in different stages, including 'NEW', 'CONNECTING', 'CONNECTED', 'TOUR SCHEDULED', 'TOUR COMPLETED', and 'WAITLIST'.

STEP 9

Use the @ to mention someone in the note

Note: If you @ mention someone on a note HubSpot will notify them of the mention.

No activity for 7 days
! No activity scheduled

Note

For **Demo Locations: Laura Harris**

type in information here **@Dylan Taylor**

B I U T_x More | 📎 📷 🎓 📄 📎

Associated with 1 record ▾

Create a **To-do** ▾ task to follow up **In 3 business days (Wednesday)** ▾

STEP 10

If you want to create a follow up task for this note, you can check to create a task and update when the task will be due

No activity for 7 days
! No activity scheduled

Note

For **Demo Locations: Laura Harris**

type in information here **@Dylan Taylor**

B I U T_x More | 📎 📷 🎓 📄 📎

Associated with 1 record ▾

Create a **To-do** ▾ task to follow up **In 3 business days (Wednesday)** ▾

Create note ✔ Draft saved 🗑

Save Cancel

STEP 11

Click on Create note

The screenshot displays a CRM interface with a modal window for creating a note. The modal is titled "Note" and has a dropdown menu for "For" set to "Demo Locations: Laura Harris". The text area contains the placeholder "type in information here @Dylan Taylor". Below the text area is a rich text editor with bold, italic, underline, and link icons, followed by a section "Associated with 1 record" with a dropdown arrow. A checkbox is checked, labeled "Create a To-do - task to follow up In 3 business days (Wednesday)". At the bottom of the modal is a prominent orange "Create note" button. The background shows a list of records with details like "Demo Location2: Sarah Moore", "Demo Location2: Robert Harris", and "Demo Locations: James Davis", each with "On-Track" status and "No activity for 7 days".

Creating a Task

6 Steps

Tasks are great to help keep track of specific actions you need to take next on a record, whether that's following up with the Pro or doing something related to the record.

STEP 12

Click on Create a task

The screenshot shows a CRM interface with a 'WAITLIST' on the left and a main panel on the right. The main panel displays deal information: 'Close Date: MM/DD/YYYY', 'Stage: New', and 'Pipeline: Leasing Pipeline'. Below this is a row of action buttons: 'Note', 'Email', 'Call', 'Task', 'Meeting', and 'More'. The 'Task' button is highlighted with a yellow border. Below the buttons is a 'Deal Summary' section with 'On-Track' and 'Microblading' tags, and an 'Edit Deal' button. At the bottom, it shows 'Deal stage: New' and a timer 'FOR 4 MINUTES'.

STEP 13

Type in the name of your task

The screenshot shows the CRM interface with a 'Task' creation modal open. The modal has a title field containing 'Test Task', which is highlighted with a yellow border. Below the title field are fields for 'Activity date' (set to 'In 3 business days (Wednesday)') and 'Send reminder' (set to 'No reminder'). There is a 'Set to repeat' checkbox. Below these are columns for 'Task ...', 'Prior...', 'Queue', and 'Activity assigned...'. The 'Task ...' column shows 'To-do', 'Prior...' shows 'None', 'Queue' shows 'None', and 'Activity assigned...' shows 'Hannah Munoz'. At the bottom right of the modal, it says 'Associated with 1 record'. The background shows the CRM interface with deal information and a 'Deal Summary' section.

STEP 14

Update the Activity date and time

The screenshot shows a CRM interface with a 'Task' dialog box open. The dialog title is 'Task' and the task name is 'Test Task'. The 'Activity date' field is highlighted with an orange box and contains the text 'In 3 business days (Wednesday)' and a clock icon followed by '5:00 PM'. To the right of the date field is a 'Send reminder' dropdown menu, which is currently set to 'No reminder'. Below the date field is a checkbox labeled 'Set to repeat'. The dialog also features a table with columns: 'Task ...', 'Prior...', 'Queue', and 'Activity assigned...'. The table contains one row with values: 'To-do', 'None', 'None', and 'Hannah Munoz'. At the bottom of the dialog, there is a 'Notes...' field and a footer with text 'Associated with 1 record'. The background shows a deal summary for 'Ashley Carvalho' with various details like 'Stage/Deal Age: 7d/7d' and 'Deal owner: Laura Gable'.

STEP 15

If you would like to be reminded of the task, update the Send reminder

The screenshot shows the same CRM interface as in Step 14, but with the 'Send reminder' dropdown menu highlighted by an orange box. The dropdown is currently set to 'No reminder'. The 'Activity date' field remains 'In 3 business days (Wednesday)' at '5:00 PM'. The rest of the dialog and background interface are identical to the previous screenshot.

STEP 16

Include a Task Description

Include any context you'll need to complete the task. You can format the text and include links, images, and other documents needed.

The screenshot shows a CRM interface with a modal window for creating a task. The modal is titled "Test Task" and has the following elements:

- Activity date:** "In 3 business days (Wednesday)" with a time selector set to "5:00 PM".
- Send reminder:** "No reminder" with a dropdown arrow.
- Set to repeat:** An unchecked checkbox.
- Task details:** A table with columns: Task (To-do), Priority (None), Queue (None), and Activity assigned to (Hannah Munoz).
- Task description:** A text area with the placeholder "include any relevant information here", highlighted with an orange border.
- Rich text editor:** Below the text area, with formatting options (B, I, U, T, More) and icons for link, image, and list.
- Associated with 1 record:** A link to view related records.
- Create button:** A red button at the bottom of the modal.

STEP 17

Click on Create

This screenshot is a close-up of the bottom right corner of the task creation modal from Step 16. The "Create" button is highlighted with an orange border. The text "include any relevant information here" is visible in the background, along with the rich text editor options.

STEP 18

Click on Schedule a meeting

The screenshot displays a CRM interface for a deal record. On the left, a 'WAITLIST' sidebar shows 3 items, with the first item being 'CRM Demo: Anna Johnson'. The main area shows deal details: 'Close Date: MM/DD/YYYY', 'Stage: New', and 'Pipeline: Leasing Pipeline'. Below this is a row of action buttons: 'Note', 'Email', 'Call', 'Task', 'Meeting' (highlighted with an orange border), and 'More'. A 'Deal Summary' section shows 'On-Track' and 'Microblading' tags, and an 'Edit Deal' link. At the bottom, the 'Deal stage' is 'New' and a timer shows 'FOR 4 MINUTES'.

STEP 19

Note: Make sure your calendar is connected to HubSpot

If it is not, Click Connect your calendar and follow HubSpot's prompts.

Calendar

Connect your calendar to use HubSpot Meetings and calendar sync.

Send meetings directly from HubSpot.

Log outgoing meetings automatically.

Sync your calendar so contacts can schedule time with you.
Requires calendar sync

See your HubSpot tasks in your calendar.
Requires an additional step with task sync. Only available on Sales Starter and up plans.

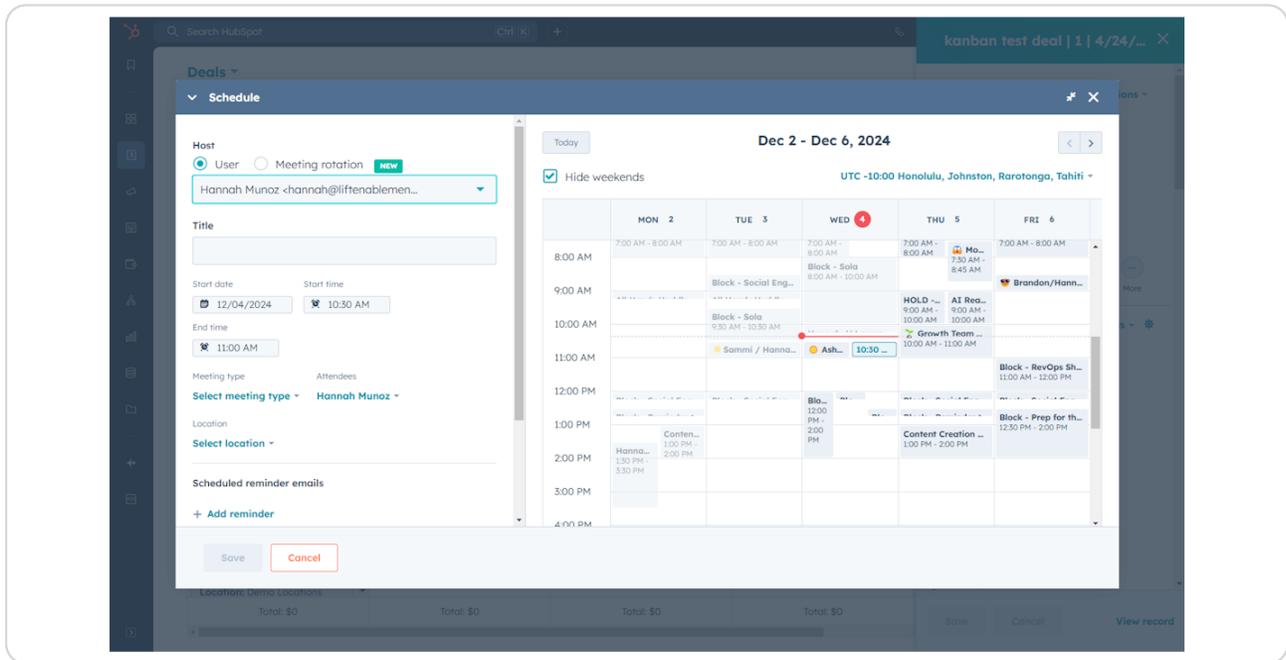
[Connect your calendar](#)



Location: Demo Locations	Total: \$0	Total: \$0	Total: \$0	Total: \$0	Save	Cancel
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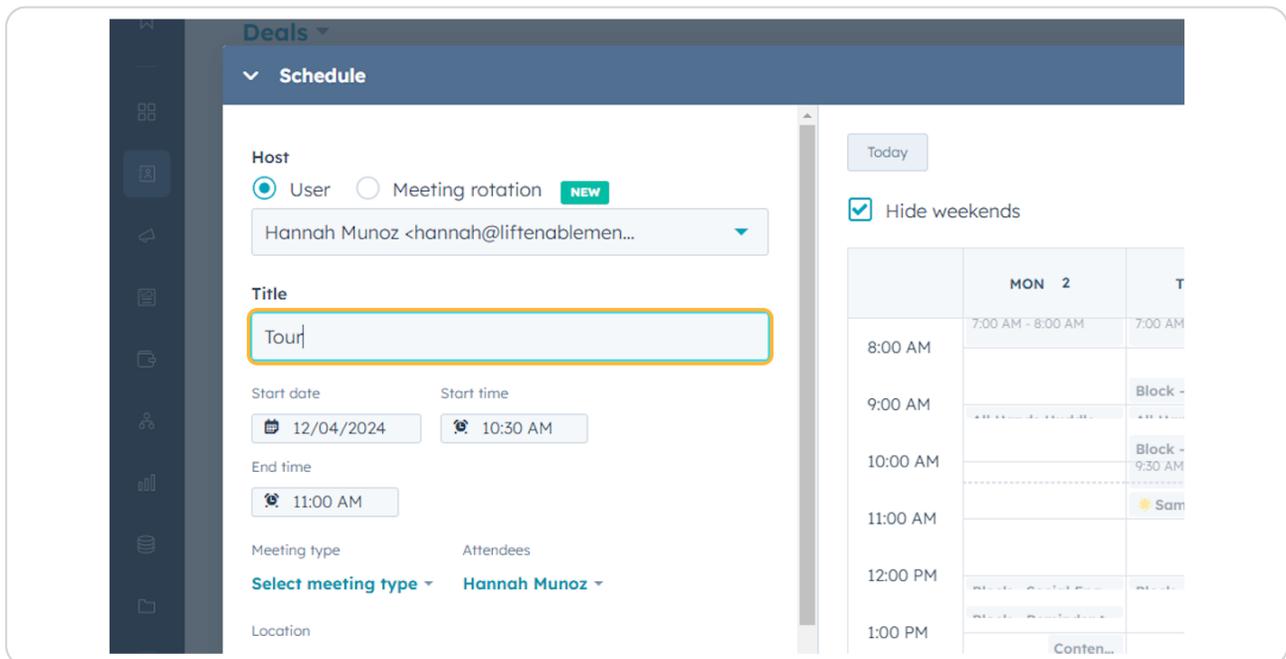
STEP 20

Once your calendar is connected, the Schedule box will appear



STEP 21

Update the Meeting Title



STEP 22

Update the Start date, Start time and End time

The screenshot shows the LIFT meeting creation interface. The 'Host' field is set to 'User' and 'Meeting rotation' is selected. The 'Title' field is 'Tour'. The 'Start date' is '12/04/2024', the 'Start time' is '10:30 AM', and the 'End time' is '11:00 AM'. The 'Meeting type' is 'Select meeting type' and the 'Attendees' list contains 'Hannah Munoz'. The 'Location' is 'Select location'. The 'Scheduled reminder emails' section is empty. On the right, a calendar view shows the meeting scheduled for Monday, December 2nd, 2024, from 10:30 AM to 11:00 AM. The calendar also shows other meetings and events for the day.

STEP 23

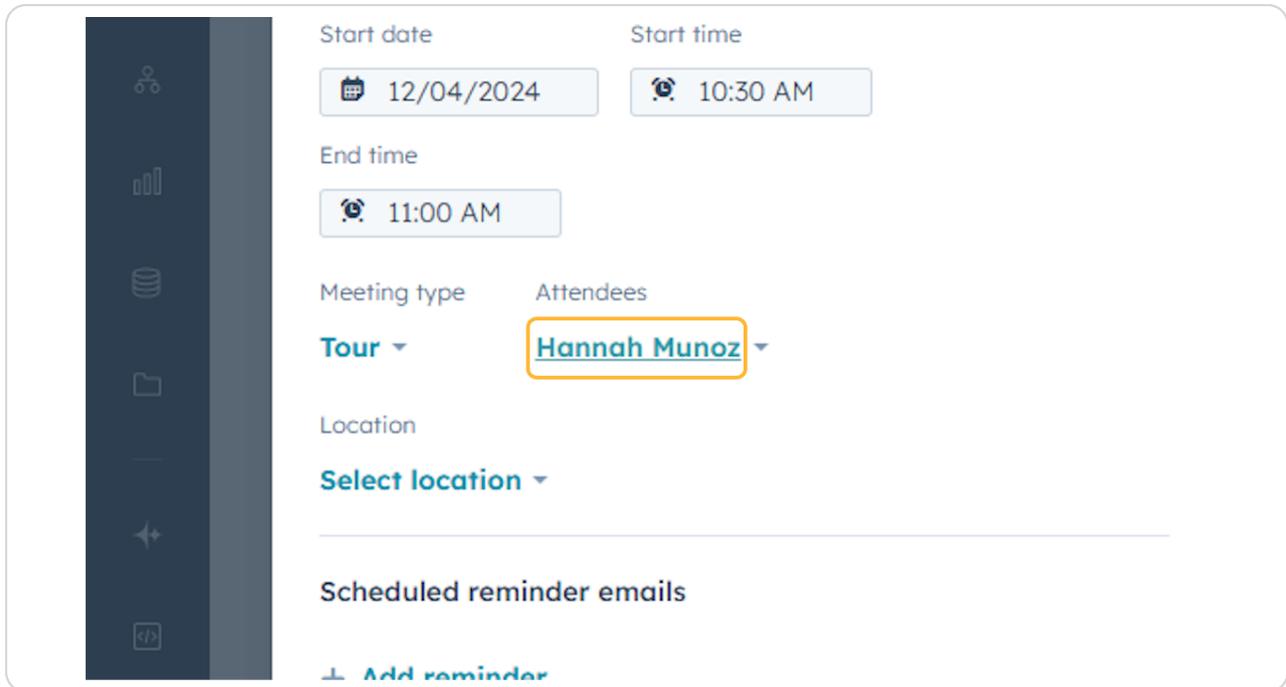
Update the Meeting type

The screenshot shows the LIFT meeting creation interface with the 'Meeting type' dropdown menu open. The 'Tour' option is selected and highlighted. The 'Virtual Tour', '15 Min Business Consult', and 'Discovery Call' options are also visible. The 'Save' and 'Cancel' buttons are at the bottom. The background shows the meeting details: 'Start date' is '12/04/2024', 'Start time' is '10:30 AM', and 'End time' is '11:00 AM'. The 'Attendees' list contains 'Hannah Munoz'.

STEP 24

Make sure all attendees are included

Note: If you are scheduling a Tour, you will have to make sure the Pro is manually selected as an attendee.

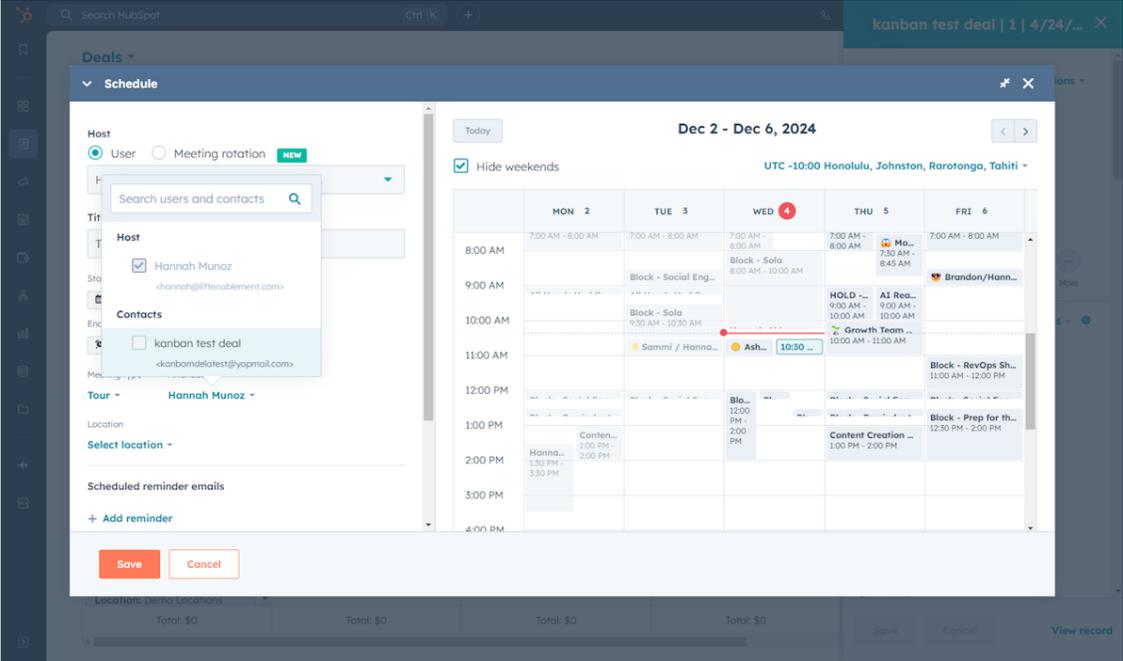


The screenshot displays a meeting scheduling interface. On the left is a dark vertical sidebar with icons for people, a bar chart, a database, a folder, a plus sign, and a calendar. The main content area includes the following fields:

- Start date:** 12/04/2024
- Start time:** 10:30 AM
- End time:** 11:00 AM
- Meeting type:** Tour
- Attendees:** Hannah Munoz (highlighted with an orange box)
- Location:** Select location
- Scheduled reminder emails:** Add reminder

STEP 25

If you schedule the meeting off of a Deal, the associated Pro (Contact) will appear for you to click on. If not, you can search for their name.



The screenshot displays the HubSpot 'Schedule' interface for a deal named 'kanban test deal'. The interface is split into two main sections: a left-hand sidebar for configuration and a right-hand calendar view.

Left-hand sidebar (Configuration):

- Host:** Radio buttons for 'User' (selected) and 'Meeting rotation' (NEW).
- Search:** A search box labeled 'Search users and contacts' with a magnifying glass icon.
- Host List:** A list of users with a checkmark next to 'Hannah Munoz' and her email address '<hannah@lifenablement.com>'. Below it, a 'Contacts' section shows 'kanban test deal' with its email address '<kanbandelotest@yopmail.com>'.
- Tour:** A dropdown menu showing 'Hannah Munoz'.
- Location:** A 'Select location' dropdown menu.
- Scheduled reminder emails:** A section with an '+ Add reminder' button.
- Buttons:** 'Save' (orange) and 'Cancel' (white) buttons at the bottom.

Right-hand calendar view:

- Header:** 'Today', 'Dec 2 - Dec 6, 2024', and 'UTC -10:00 Honolulu, Johnston, Rarotonga, Tahiti'.
- Grid:** A calendar grid with columns for 'MON 2', 'TUE 3', 'WED 4', 'THU 5', and 'FRI 6'. The time slots range from 8:00 AM to 4:00 PM.
- Meetings:** Various meeting blocks are visible, such as 'Block - Social Eng...', 'Block - Solo', 'HOLD', 'AI Rea...', 'Growth Team', 'Block - RevOps SH...', and 'Block - Prep for th...'. A specific meeting on Wednesday at 10:30 AM is highlighted with a red box and labeled 'Ash...'.
- Options:** A 'Hide weekends' checkbox is checked.

STEP 26

Include any reminder emails needed

Tour ▾ **2 attendees** ▾

Location

Select location ▾

Scheduled reminder emails

+ Add reminder

Attendee description

Send a description to your attendees...

Associated with 2 records ▾

+ Add internal note

STEP 27

Update the Attendee description

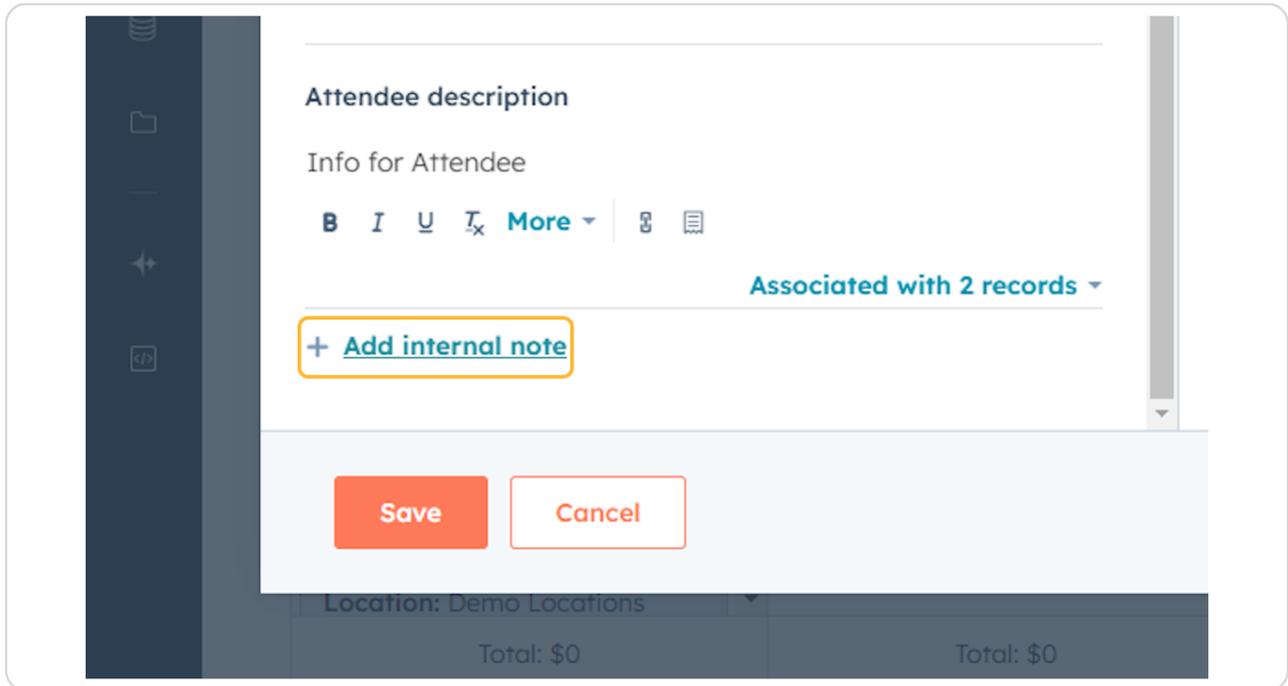
Note: This description will be what the attendee will see.

The screenshot shows the LIFT software interface. On the left is a dark sidebar with various icons. The main content area is divided into sections. The 'Scheduled reminder email' section has a dropdown set to '3 days before' and a trash icon. Below it is a '+ Add reminder' button and a checkbox for 'Include the attendee description in the reminder email body'. The 'Attendee description' section has a text input field containing 'Send a description to your attendees...' which is highlighted with an orange border. Below the input field is a link that says 'Associated with 2 records'. At the bottom of the main content area are 'Save' and 'Cancel' buttons. On the right side, there is a calendar view showing time slots from 9:00 AM to 4:00 PM. Some slots are occupied by events like 'Block - 9:30 AM' and 'Hanna... 1:30 PM - 3:30 PM'.

STEP 28

Add an internal note (optional)

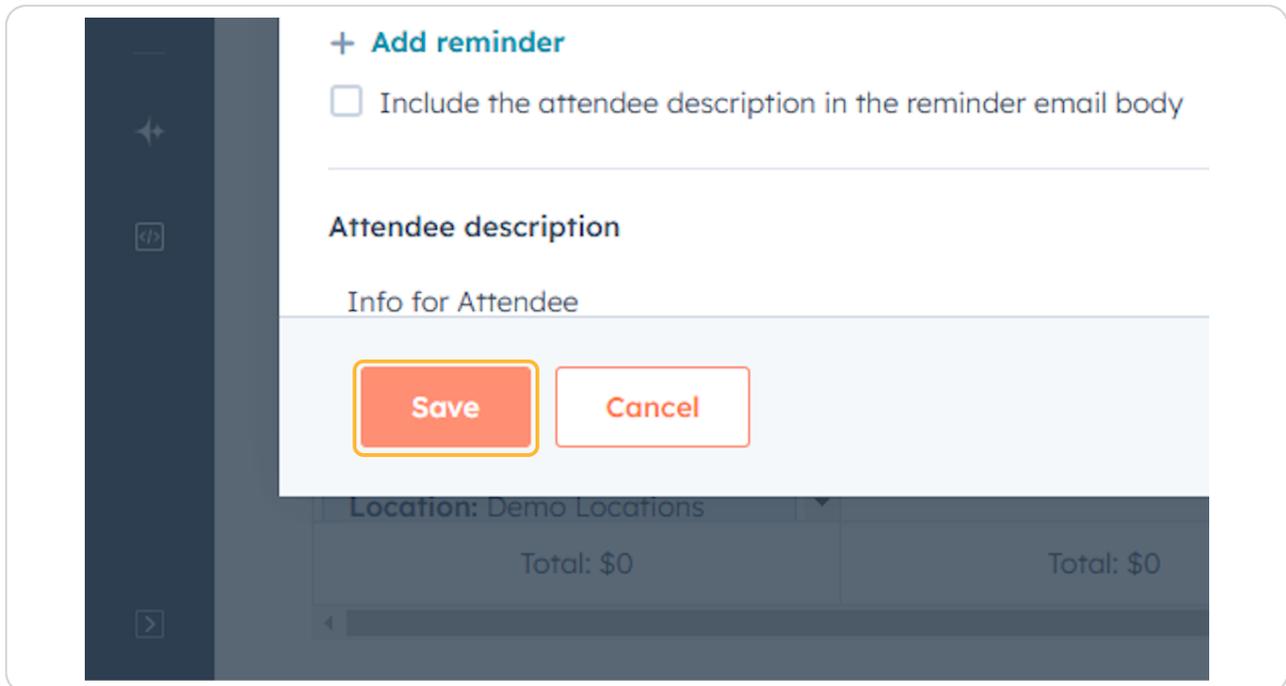
This note will only be seen by you or anyone else on the team that is joining the meeting.



The screenshot shows a software interface for editing an attendee's information. The main section is titled "Attendee description" and contains the text "Info for Attendee". Below this is a rich text editor with formatting options: Bold (B), Italic (I), Underline (U), Strikethrough (T_x), and a "More" dropdown menu. To the right of the editor, there is a link that says "Associated with 2 records" with a downward arrow. A yellow box highlights a button labeled "+ Add internal note". At the bottom of the form, there are two buttons: "Save" (orange) and "Cancel" (white with orange border). Below the form, a table is partially visible with a header "Location: Demo Locations" and two columns, each containing "Total: \$0".

STEP 29

Click on Save



Log an Item

10 Steps

As you are having conversations with a Pro outside of HubSpot, you are able to log those items to the record.

STEP 30

Click on the More button

The screenshot shows a CRM dashboard with a grid of client cards. The dashboard is divided into five columns: CONNECTED (2 cards), TOUR SCHEDULED (2 cards), TOUR COMPLETED (2 cards), and WAITLIST (1 card). Each card displays client information, service details, and activity status. The 'On-Track' status is highlighted in green. The activity status for each card is as follows:

- CONNECTED:**
 - CRM Demo: Emily Harris: Task 3 hours ago, Meeting in 8 days.
 - CRM Demo: David Doe: No activity for 6 days, No activity scheduled.
- TOUR SCHEDULED:**
 - CRM Demo: David Moore: No activity for 6 days, No activity scheduled.
 - Demo Location2: Sarah Moore: No activity for 6 days.
- TOUR COMPLETED:**
 - Demo Locations: James Brown: No activity for 6 days, No activity scheduled.
 - Demo Location2: Robert Harris: No activity for 6 days.
- WAITLIST:**
 - CRM Demo: Anna Johnson: No activity for 6 days, No activity scheduled.
 - Demo Locations: James Johnson: No activity for 6 days, No activity scheduled.
 - Demo Locations: Jane B: (partially visible)

STEP 31

Choose what you want to log

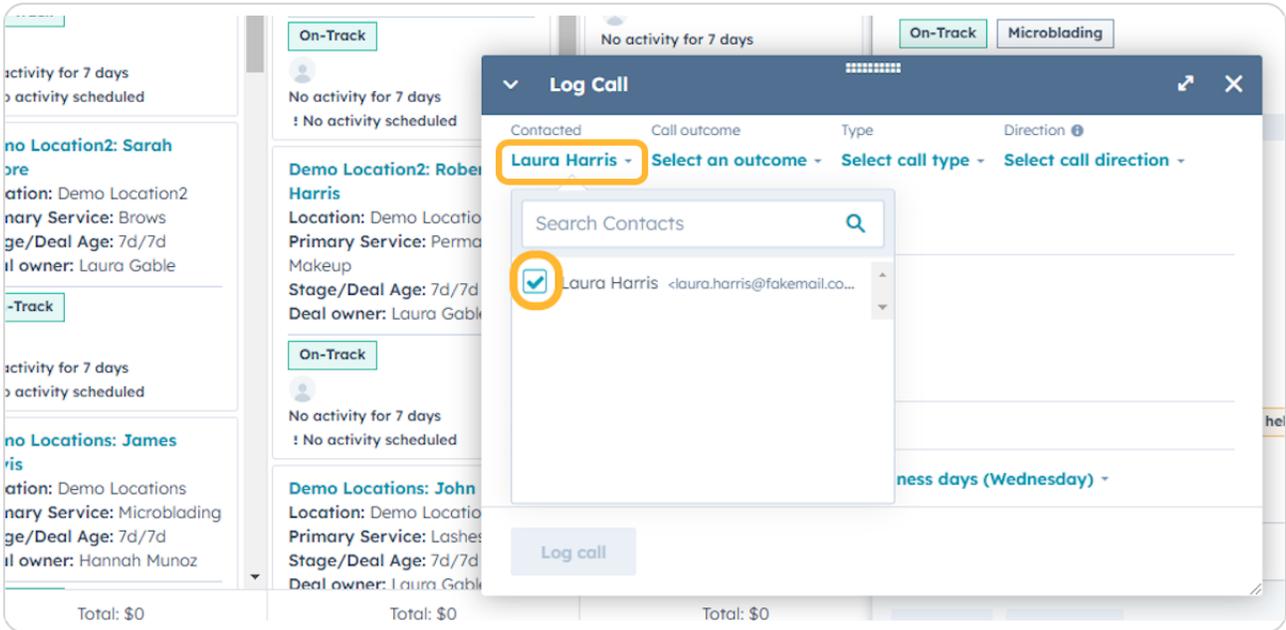
For this example I'll log a call.

This screenshot shows the same CRM dashboard as in Step 30, but with updated activity dates. The activity status for each card is as follows:

- CONNECTED:**
 - CRM Demo: Emily Harris: Task 21 hours ago, Meeting in 7 days.
 - CRM Demo: David Doe: No activity for 7 days, No activity scheduled.
- TOUR SCHEDULED:**
 - CRM Demo: David Moore: No activity for 7 days, No activity scheduled.
 - Demo Location2: Sarah Moore: No activity for 7 days.
- TOUR COMPLETED:**
 - Demo Locations: James Brown: No activity for 7 days, No activity scheduled.
 - Demo Location2: Robert Harris: No activity for 7 days.
- WAITLIST:**
 - CRM Demo: Anna Johnson: No activity for 7 days, No activity scheduled.
 - Demo Locations: James Johnson: No activity for 7 days, No activity scheduled.
 - Demo Locations: Jane B: (partially visible)

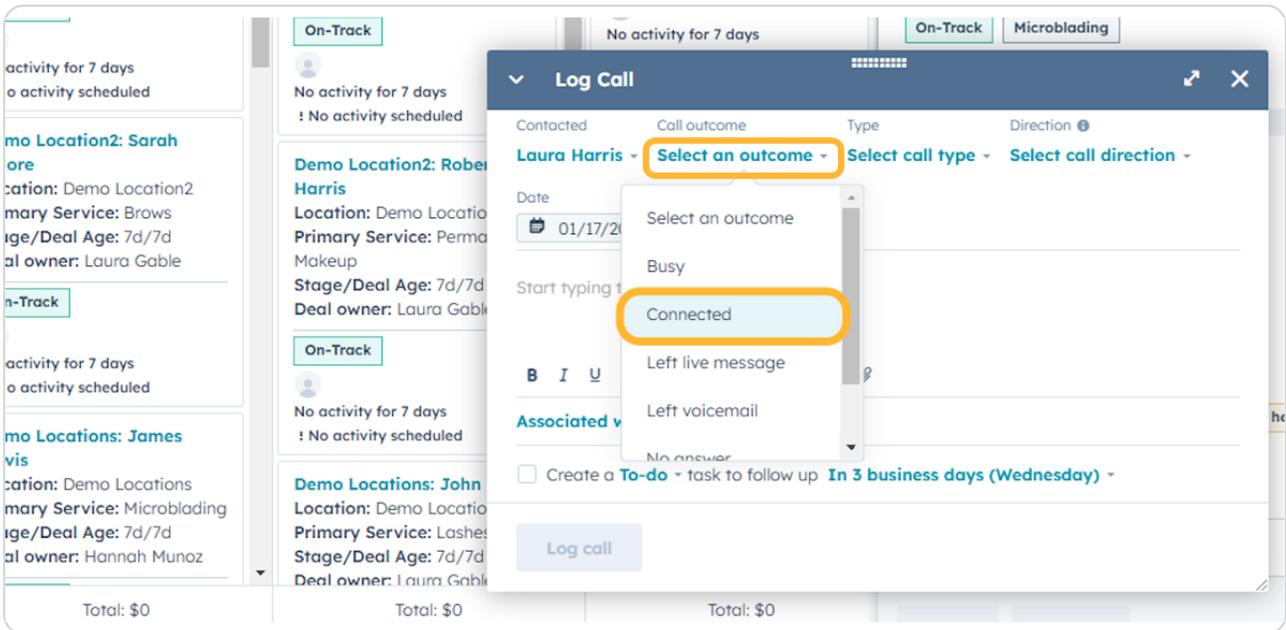
STEP 32

Include the Pro that was involved



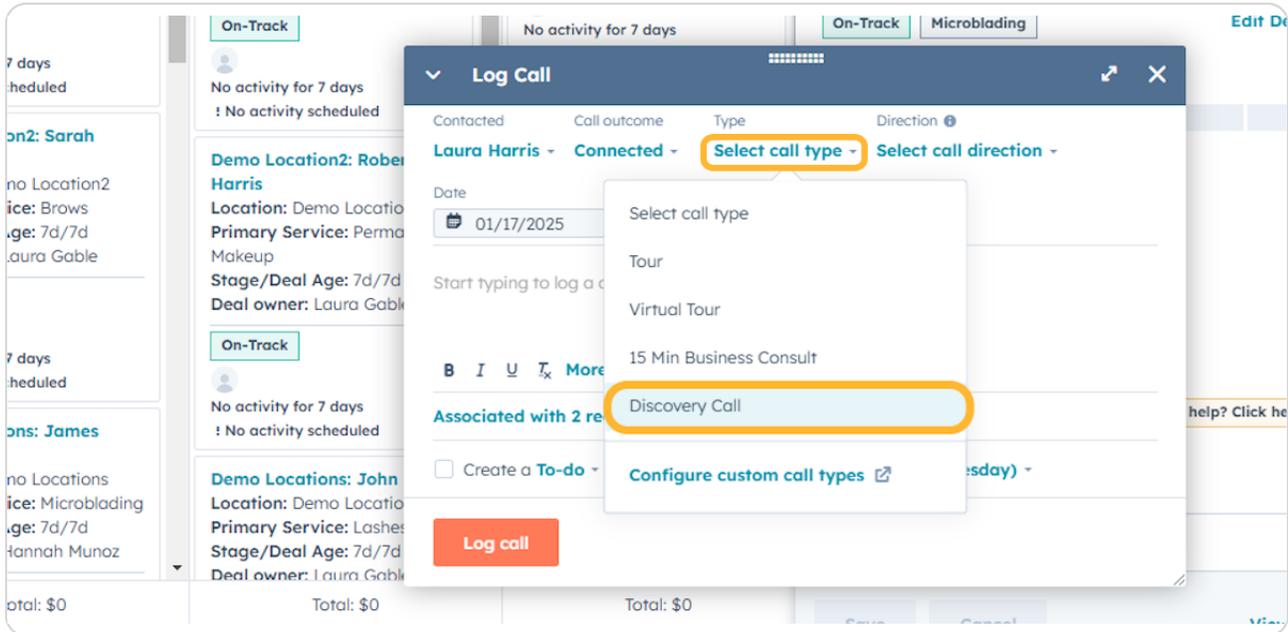
STEP 33

Update the Call outcome



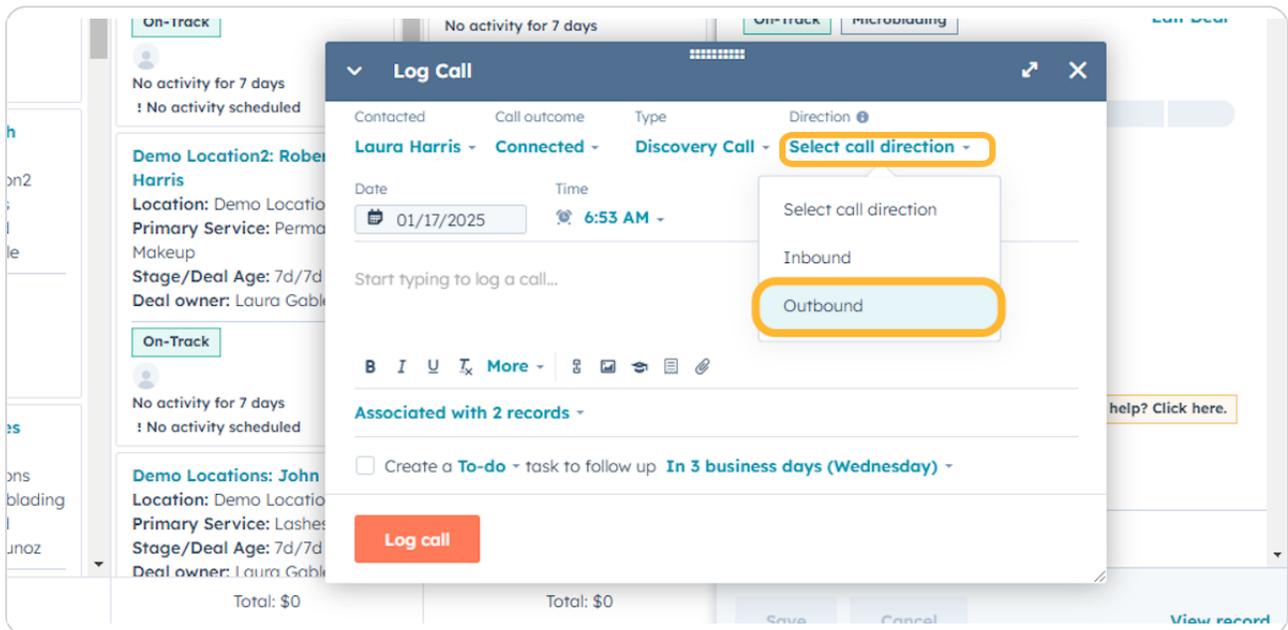
STEP 34

Update the Call Type



STEP 35

Update the Direction of the Call



STEP 36

Update the Date and Time of the Call

The screenshot shows a CRM interface with a 'Log Call' modal window open. The modal is titled 'Log Call' and has a close button (X) in the top right corner. It displays the following information:

- Contacted: Laura Harris
- Call outcome: Connected
- Type: Discovery Call
- Direction: Outbound
- Date: 01/17/2025
- Time: 6:53 AM

The date and time fields are highlighted with an orange box. Below the date and time fields, there is a text area for logging information about the call. The text area contains the text 'Log information about what was discussed on the call'. Below the text area, there is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (T), and a 'More' dropdown menu. Below the rich text editor, there is a section titled 'Associated with 2 records' with a dropdown arrow. Below this section, there is a checkbox labeled 'Create a To-do task to follow up' with a dropdown arrow showing 'In 3 business days (Wednesday)'. At the bottom of the modal, there is a red 'Log call' button and a green checkmark icon with the text 'Draft saved' and a trash icon.

STEP 37

Include details about the Call

The screenshot shows a CRM interface with a 'Log Call' modal window open. The modal is titled 'Log Call' and has a close button (X) in the top right corner. It displays the following information:

- Contacted: Laura Harris
- Call outcome: Connected
- Type: Discovery Call
- Direction: Outbound
- Date: 01/17/2025
- Time: 6:53 AM

The text area for logging information about the call is highlighted with an orange box. The text area contains the text 'Log information about what was discussed on the call'. Below the text area, there is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (T), and a 'More' dropdown menu. Below the rich text editor, there is a section titled 'Associated with 2 records' with a dropdown arrow. Below this section, there is a checkbox labeled 'Create a To-do task to follow up' with a dropdown arrow showing 'In 3 business days (Wednesday)'. At the bottom of the modal, there is a red 'Log call' button and a green checkmark icon with the text 'Draft saved' and a trash icon.

STEP 38

Create a Follow-Up Task if needed

The screenshot shows a CRM interface with a 'Log Call' dialog box open. The dialog box contains the following information:

- Contacted:** Laura Harris
- Call outcome:** Connected
- Type:** Discovery Call
- Direction:** Outbound
- Date:** 01/17/2025
- Time:** 6:53 AM

Below the call information is a text area for logging details, followed by a rich text editor with options for Bold (B), Italic (I), Underline (U), Text color (T), and More. Below the editor, there is a section titled 'Associated with 2 records' with a checked checkbox and the text 'Create a To-do task to follow up In 3 business days (Wednesday)'. At the bottom of the dialog, there is a red 'Log call' button and a 'Draft saved' indicator.

STEP 39

Click Log call

This screenshot is identical to the one in Step 38, showing the 'Log Call' dialog box. In this step, the red 'Log call' button at the bottom of the dialog is highlighted with a yellow box, indicating the action to be performed.

View Your Notes, Tasks, Meetings, and More in the... 4 Steps

STEP 40

Click on View record at the bottom of the Deal Card Preview

The screenshot displays a CRM dashboard with four columns representing different deal stages. Each column has a header with a count and a left arrow. The deal cards are organized into rows. Each card includes a title, location, primary service, stage/deal age, deal owner, an 'On-Track' status, and activity information.

CONNECTED (2)	TOUR SCHEDULED (9)	TOUR COMPLETED (7)	WAITLIST
CRM Demo: Emily Harris Location: CRM Demo Primary Service: Other Stage/Deal Age: 3d/6d Deal owner: Hannah Munoz On-Track Task 3 hours ago Meeting in 8 days	CRM Demo: David Moore Location: CRM Demo Primary Service: Barber Stage/Deal Age: 6d/6d Deal owner: Dylan Taylor On-Track No activity for 6 days ! No activity scheduled	Demo Locations: James Brown Location: Demo Locations Primary Service: Botox/Fillers Stage/Deal Age: 6d/6d Deal owner: Ashley Carvalho On-Track No activity for 6 days ! No activity scheduled	CRM Demo: Anna Johnson Location: CRM Demo Primary Service: Microblading Stage/Deal Age: 6d/6d Deal owner: Laura Gable No activity for 6 days ! No activity scheduled
CRM Demo: David Doe Location: CRM Demo Primary Service: Skincare Stage/Deal Age: 6d/6d Deal owner: Ashley Carvalho On-Track No activity for 6 days ! No activity scheduled	Demo Location2: Sarah Moore Location: Demo Location2 Primary Service: Brows Stage/Deal Age: 6d/6d Deal owner: Laura Gable On-Track No activity for 6 days	Demo Location2: Robert Harris Location: Demo Location2 Primary Service: Permanent Makeup Stage/Deal Age: 6d/6d Deal owner: Laura Gable On-Track	Demo Locations: James Johnson Location: Demo Location2 Primary Service: Botox/Fillers Stage/Deal Age: 6d/6d Deal owner: Laura Gable No activity for 6 days ! No activity scheduled
			Demo Locations: Jane B

STEP 41

Click on Activities in the center of the record

Note: To the left-hand side, the activity buttons are located towards the top of the record. You can create notes, tasks and meetings from here, too.

The screenshot shows a HubSpot deal record for 'Demo Locations: Laura Harris'. At the top, there is a 'Highlights' section with a table of deal information:

DEAL TAGS	DEAL STATUS	DEAL ORIGIN	CREATE DATE
On-Track	Open	Manual/Hubspot	01/10/2025 12:04 PM HST (6 day...)

Below the highlights is a 'Details' section with a table of deal information:

Location	Deal name	Phone Number	Email Address
Demo Locations	Demo Locations: Laura Harris	1-739-240-6917	laura.harris@fakemail.com
Deal Origin	Lead Channel Type	Lead Channel	Channel Group (B)
Manual/Hubspot	Outbound	Web Search	--

STEP 42

On the Activity tab you will see the activities you created

The screenshot shows the HubSpot Activity tab for the deal record. The 'Activity' section is highlighted with an orange box and contains the following list of activities:

- Task assigned to Hannah Munoz** (Due: Jan 22, 2025 at 5:00 PM HST)
 - Follow up on Demo Locations: Laura Harris
- Task assigned to Hannah Munoz** (Due: Jan 22, 2025 at 5:00 PM HST)
 - Follow up on Demo Locations: Laura Harris
- Task assigned to Hannah Munoz** (Due: Jan 22, 2025 at 5:00 PM HST)
 - Test Task

Below the 'Upcoming' section, there is a 'January 2025' section with the following activities:

- Note by Hannah Munoz** (Jan 11, 2025 at 7:01 AM HST)
 - Type in information here
- Logged call - Connected by Hannah Munoz** (Jan 11, 2025 at 7:01 AM HST)
 - Log information about what was discussed on the call.
- Deal activity** (Jan 16, 2025 at 1:01 PM HST)
 - Hannah Munoz moved deal from Connecting to New. [View details](#)

STEP 43

To see all the information on an activity, click the arrow next to the activity and it will open up

January 2025

> **Note** by Hannah Munoz Jan 17, 2025 at 7:01 AM HST
type in information here

▼ **Logged call - Connected** by Hannah Munoz **Actions** ▼ Jan 17, 2025 at 7:01 AM HST
with Laura Harris
Log information about what was discussed on the call.

Contacted	Outcome	Type	Direction	Date	Time
Laura Harris ▼	Connected ▼	Discovery Call ▼	Outbound ▼	01/17/2025	7:01 AM ▼

🗨 **Add comment** **2 associations** ▼

Deal activity Jan 16, 2025 at 1:01 PM HST
Hannah Munoz moved deal from Connecting to New. [View details](#)

