Access and Update Quickbase Data in HubSpot

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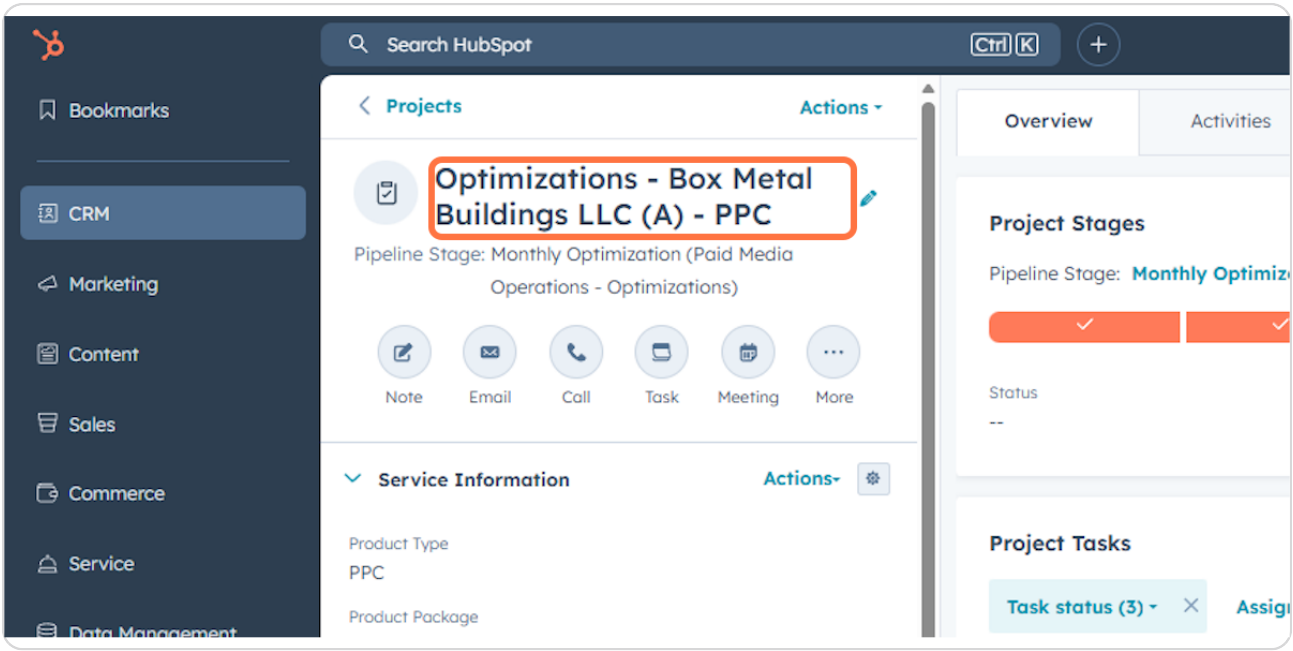
Created by	Creation Date	Last Updated
LP Team	Jan 08, 2026	Jan 08, 2026

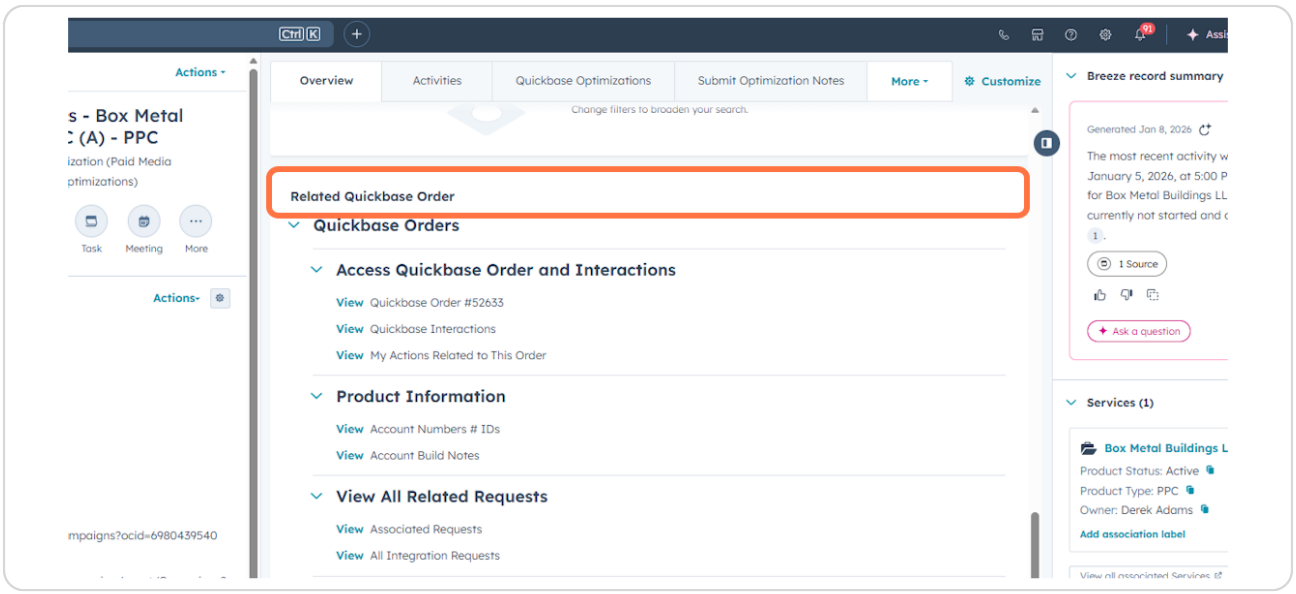
STEP 1

Navigate to the Optimization Project for the Service you want to see legacy Quickbase data for.



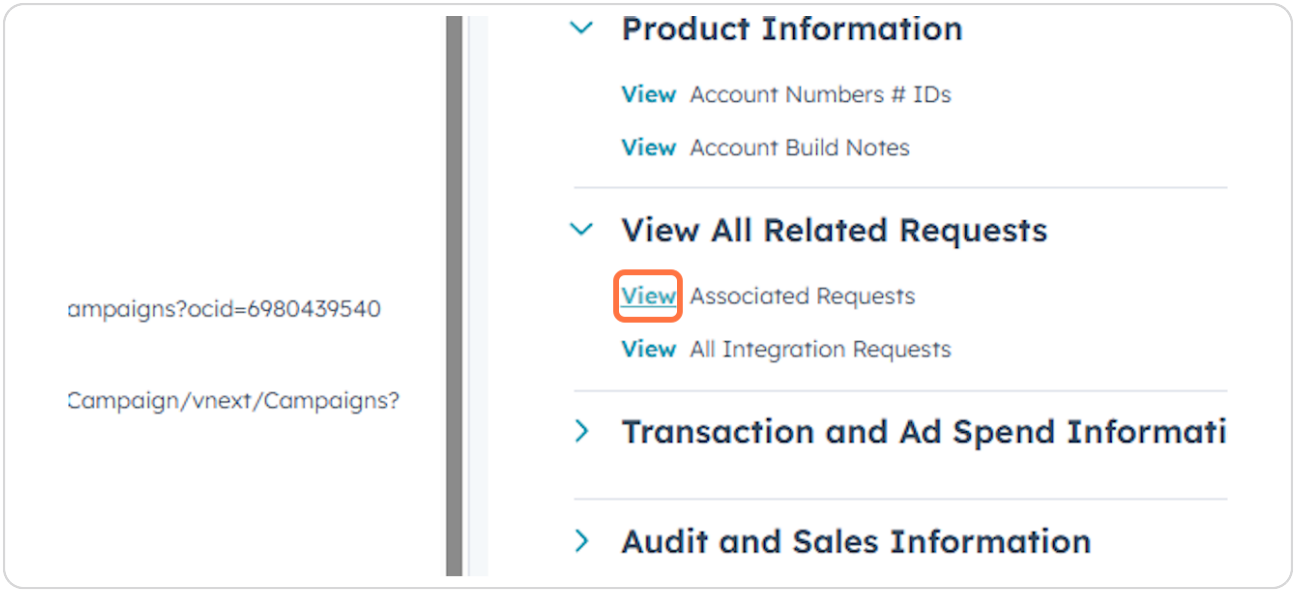
STEP 2

On the Overview tab, you can find the "Related Quickbase Order" card. Here you will find several links back to specific areas of the Quickbase CRM, including Order Info, Account Numbers, Build Notes, Related Requests, Transactions, and more.



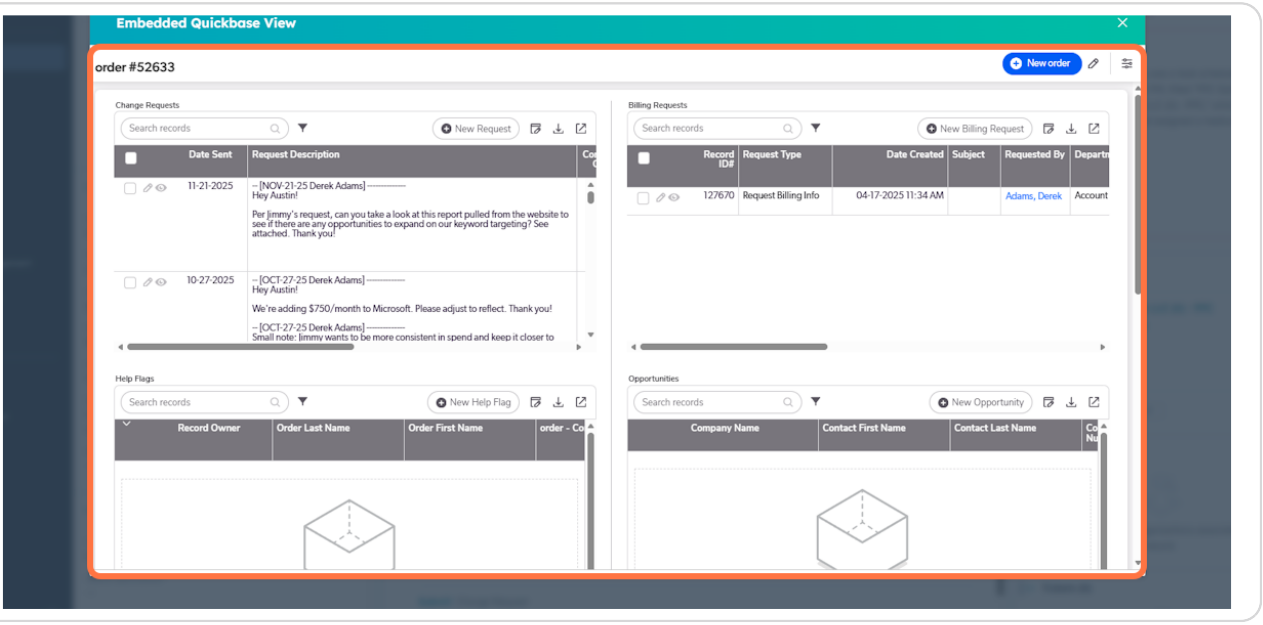
STEP 3

Click "View" on the type of information you wish to see. In this example, we are looking at previous requests.



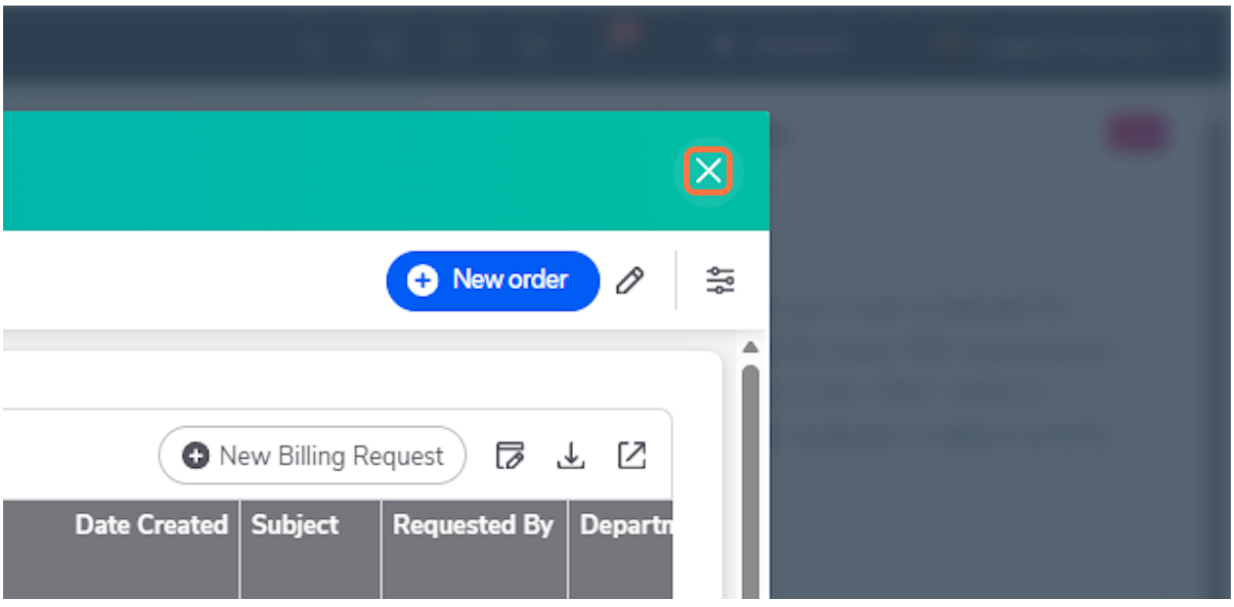
STEP 4

This action will open a modal view with a Quickbase form displaying the information you want to see. In this example, we see embedded reports of the Order's related requests.



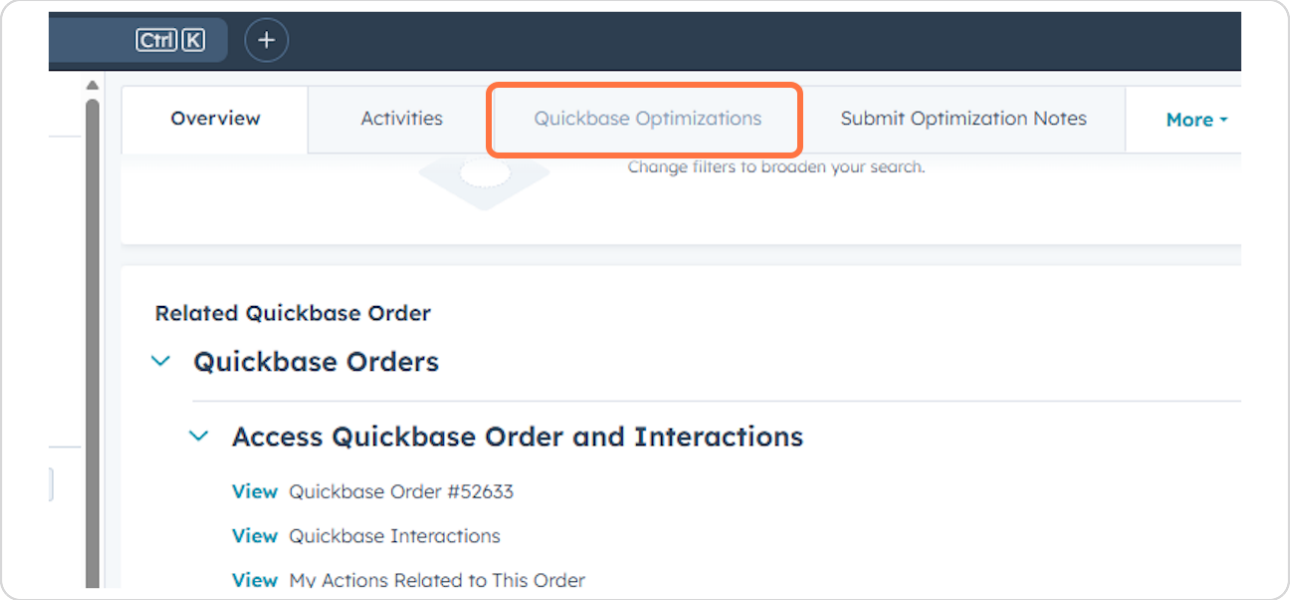
STEP 5

Click on Close in the top right to close the window.



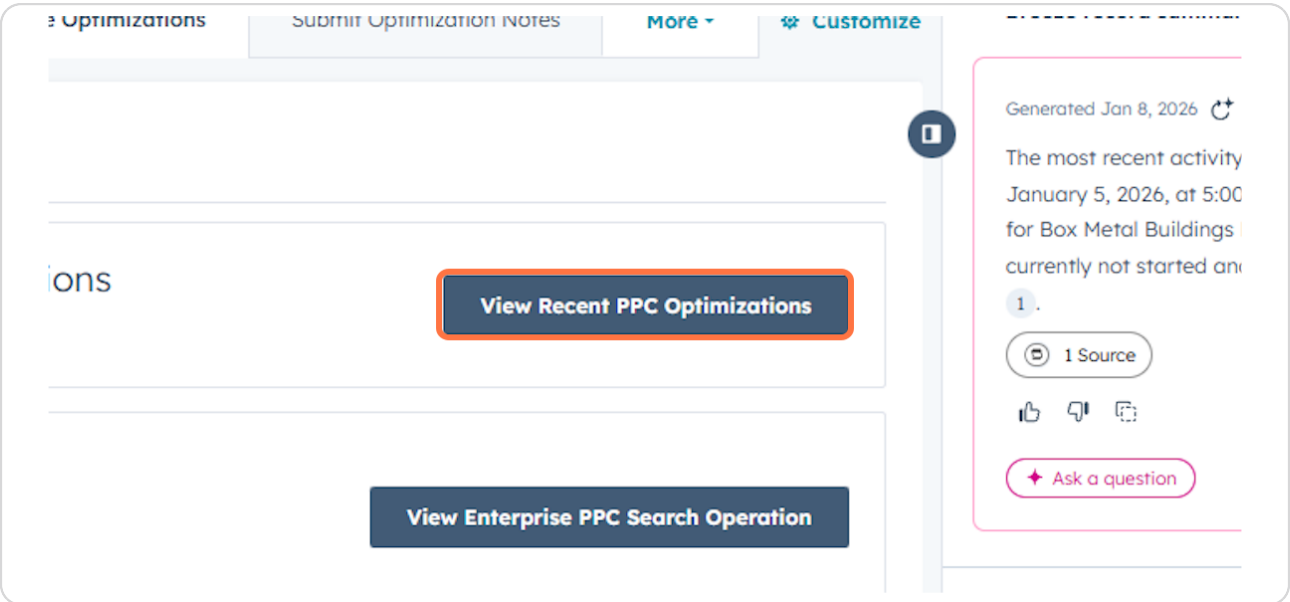
STEP 6

Click on Quickbase Optimizations tab to navigate to viewing legacy Track and Optimization notes.



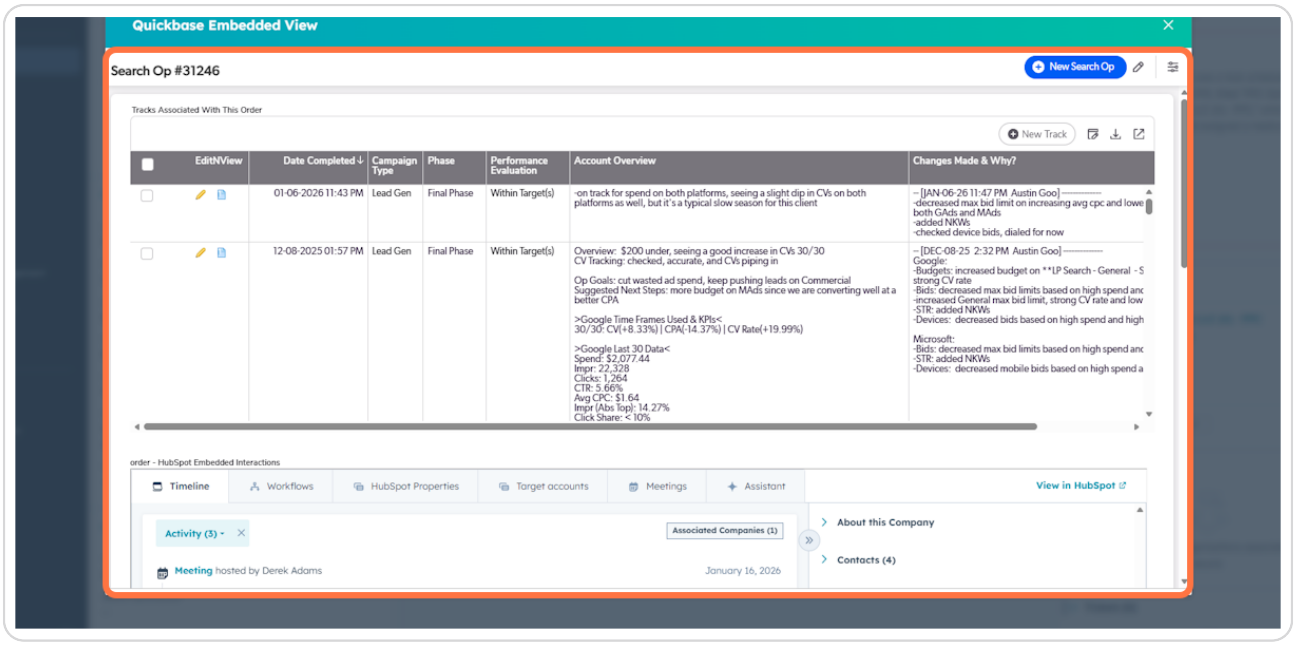
STEP 7

Depending on your product focus, select the button relevant to your department. In this example, we are viewing recent SMB PPC Optimizations via Tracks.



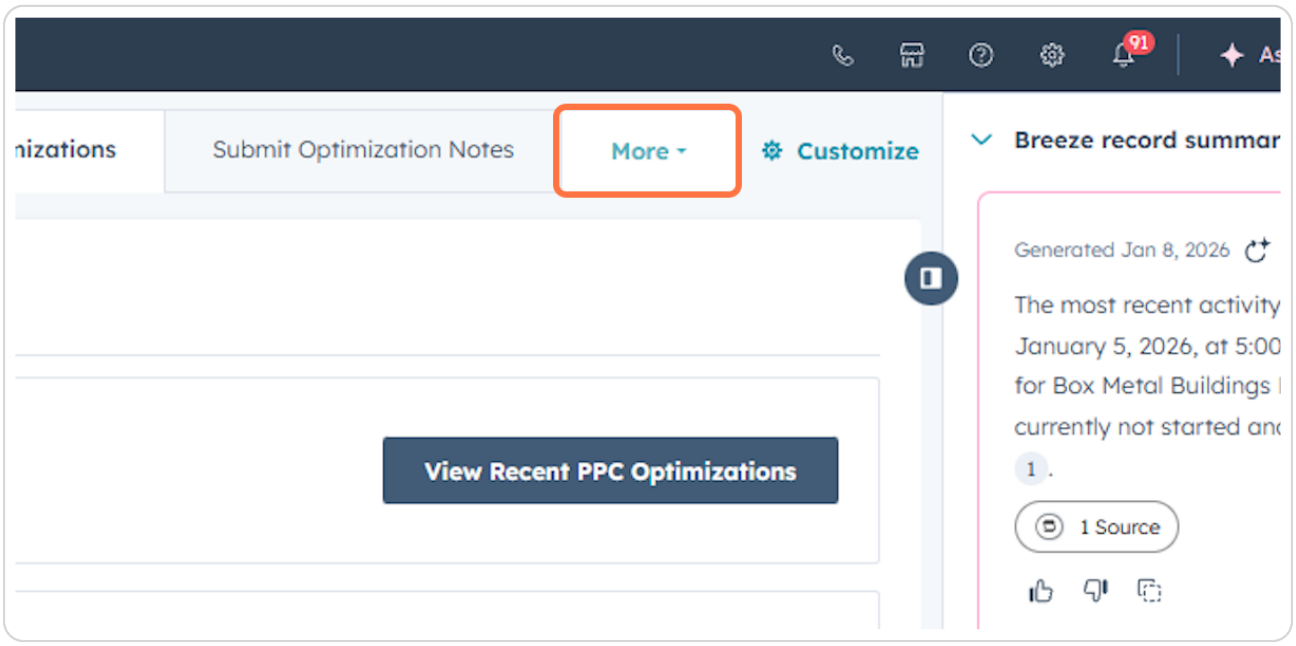
STEP 8

The modal view will open and display an abbreviated Track or Operation form showing previous Op Notes logged for the Client.



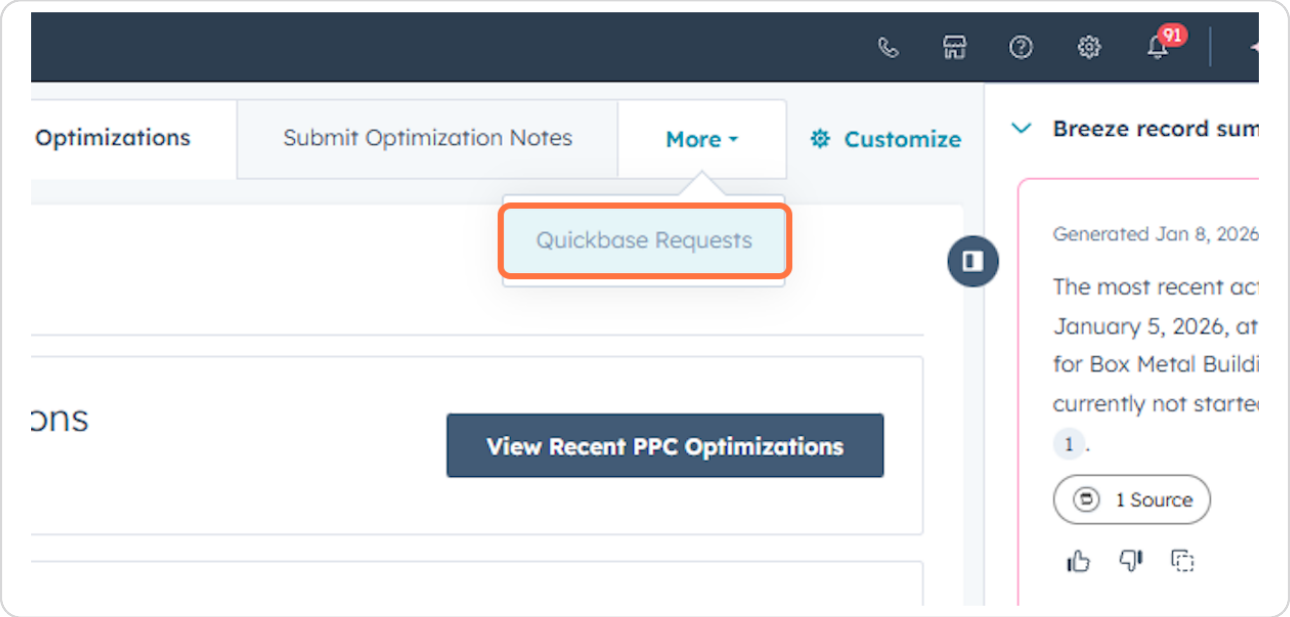
STEP 9

Click on the More dropdown tab.



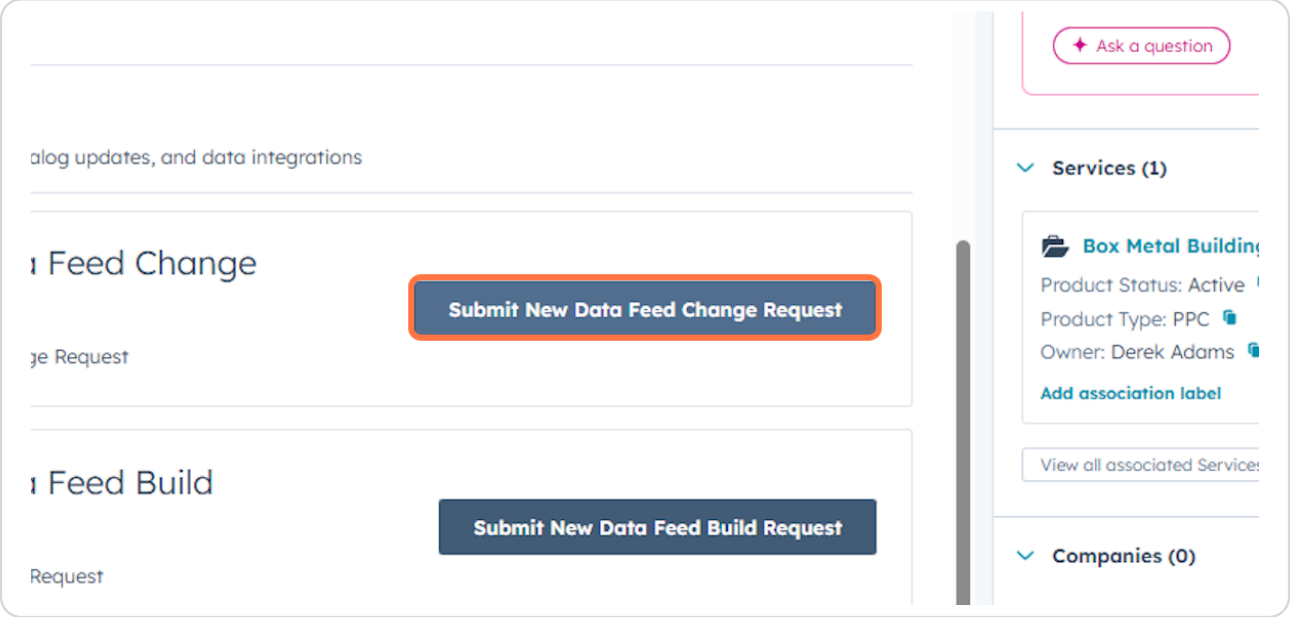
STEP 10

Select Quickbase Requests



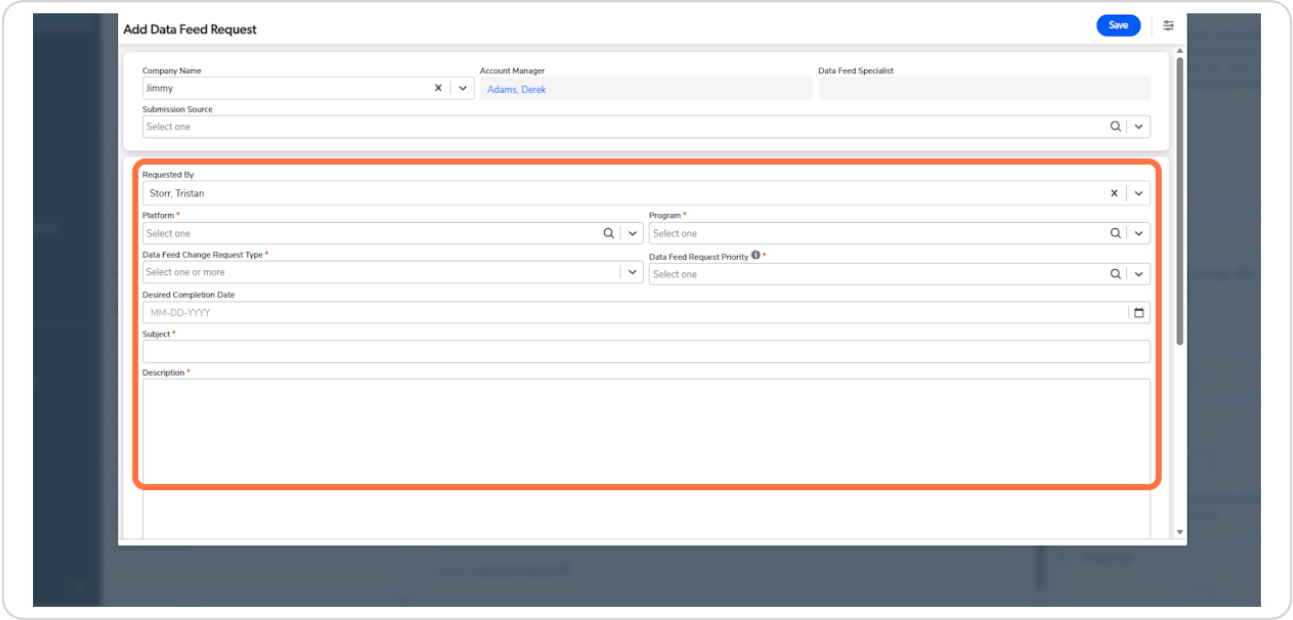
STEP 11

Here you can find several options for accessing the legacy Quickbase Request systems you interact with include Paid Social Request, Data Feed, Code, Billing, and Platform Support.



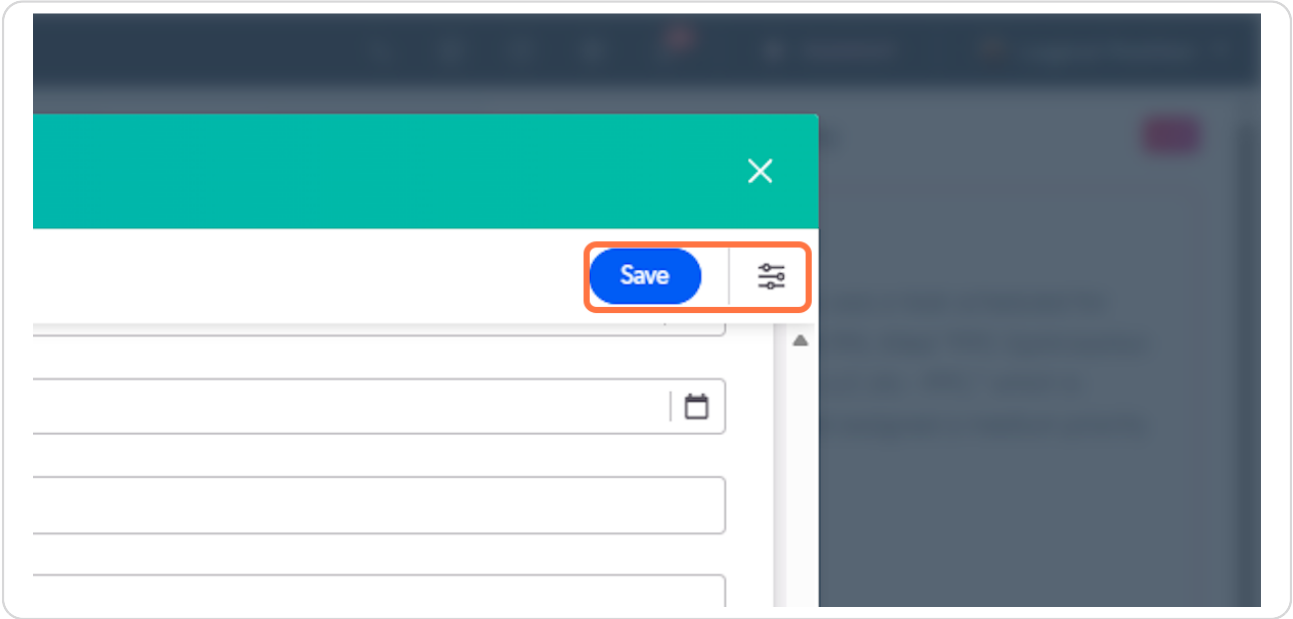
STEP 12

Selecting one of these options will open a similar modal view, this time with the ability to add information to a form.



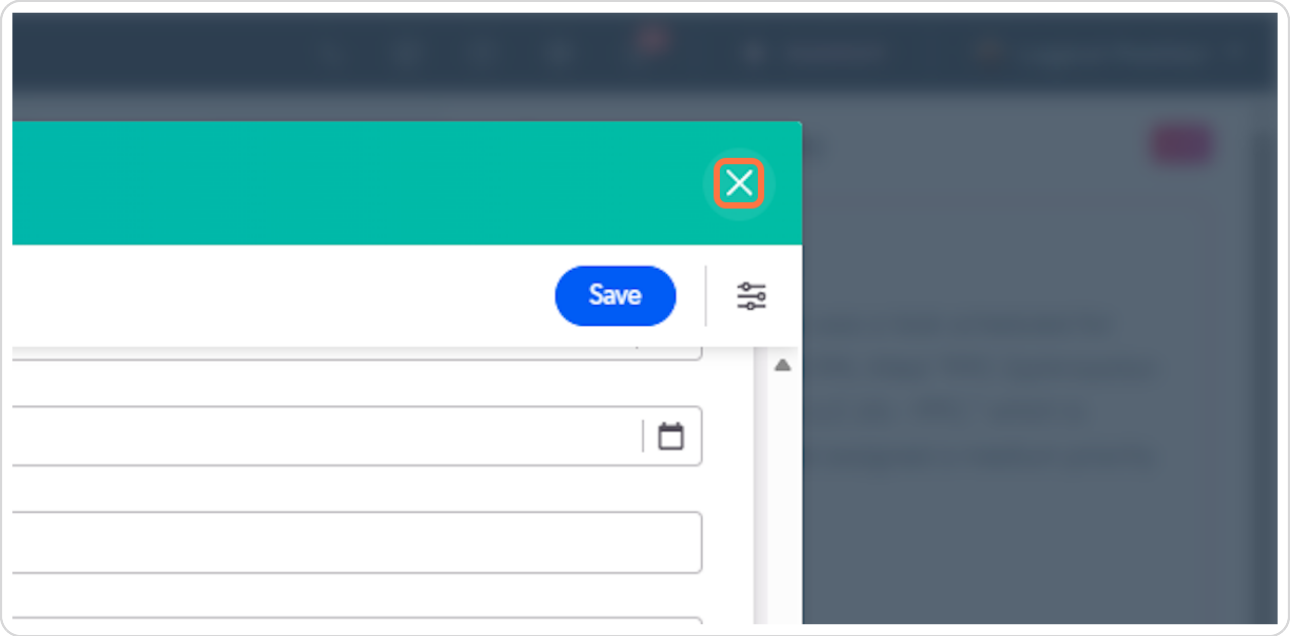
STEP 13

When you have completed filling the form, hit "Save" to create the request within Quickbase.



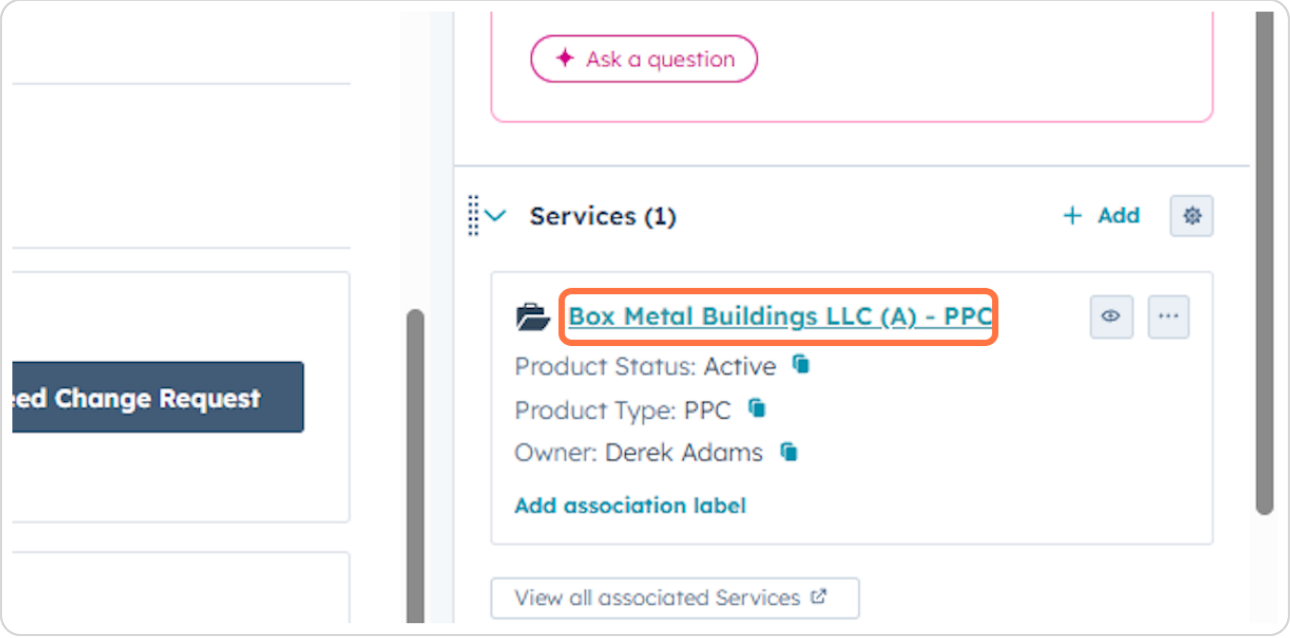
STEP 14

Click on Close



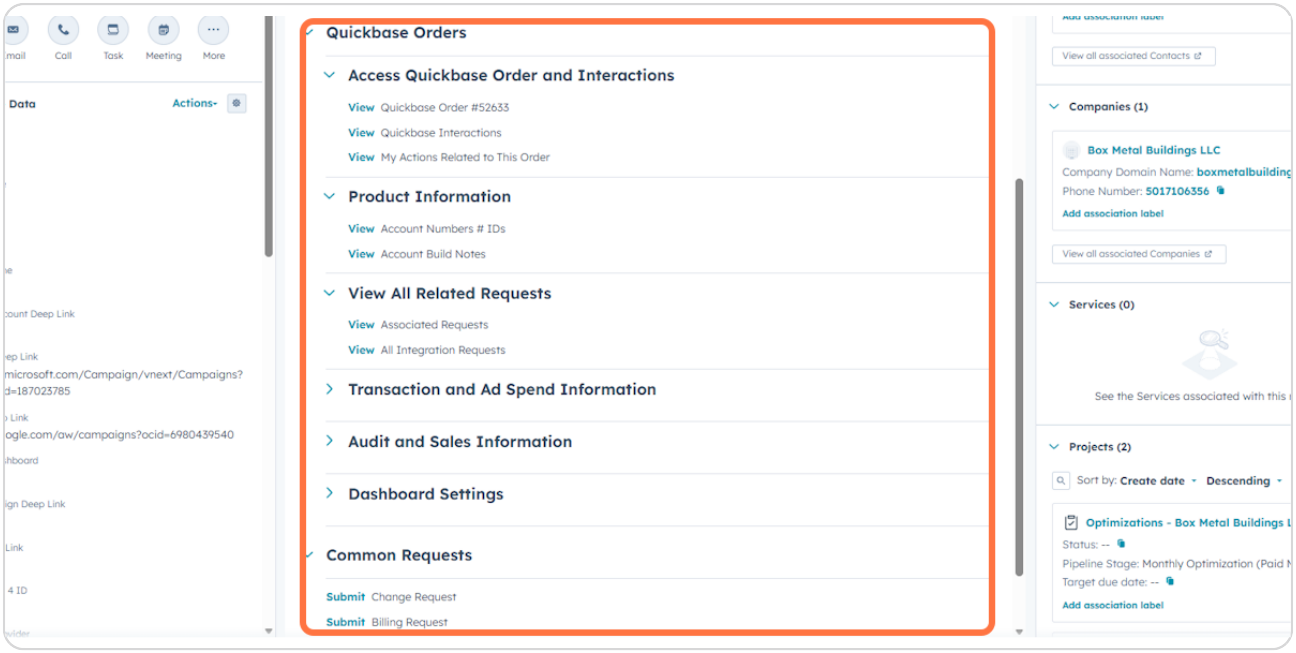
STEP 15

You can also find these same button-to-modal views on the Service record associated with the Project.



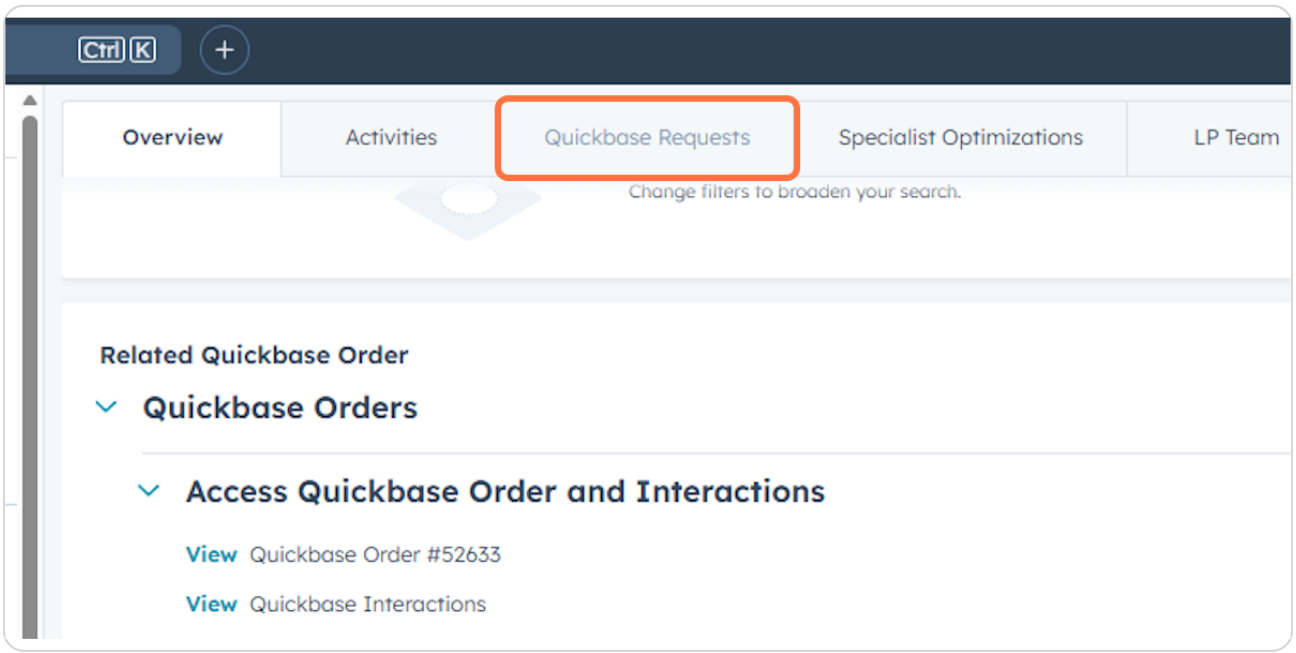
STEP 16

Related Quickbase Order card on the Overview Tab



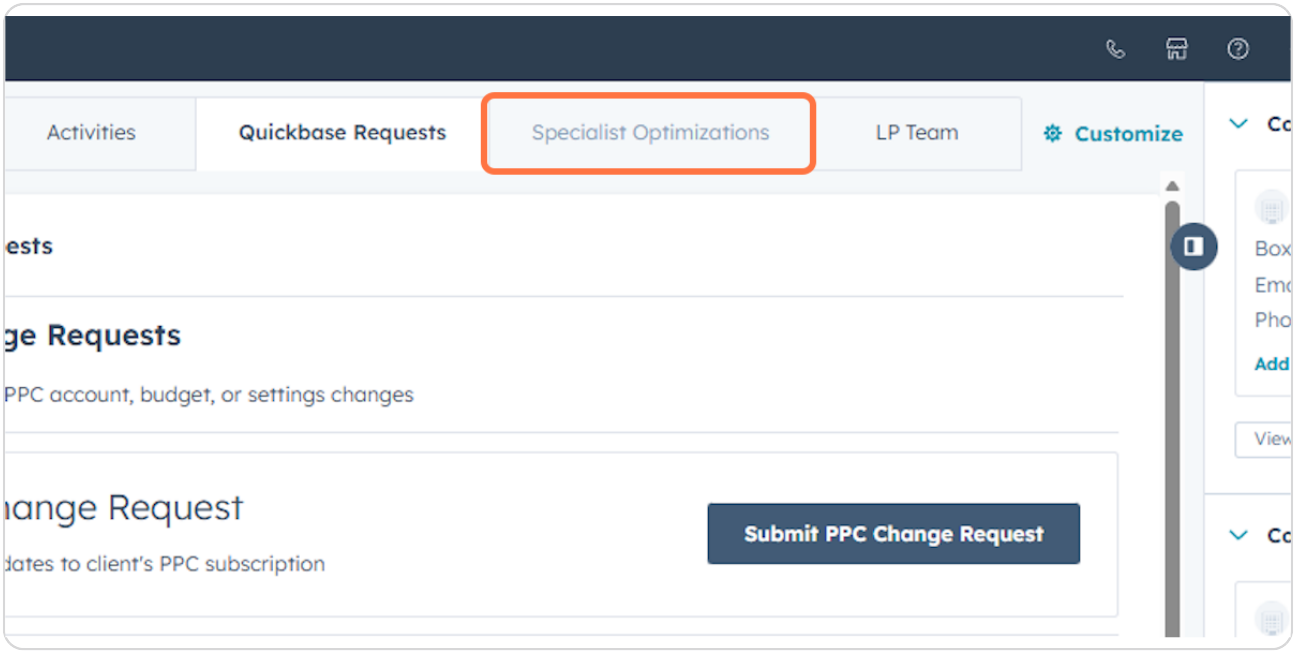
STEP 17

Quickbase Requests Tab on Services



STEP 18

Specialist Optimizations Tab on Services



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