

Access and Update Quickbase Data in HubSpot

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Created by

LP Team

Creation Date

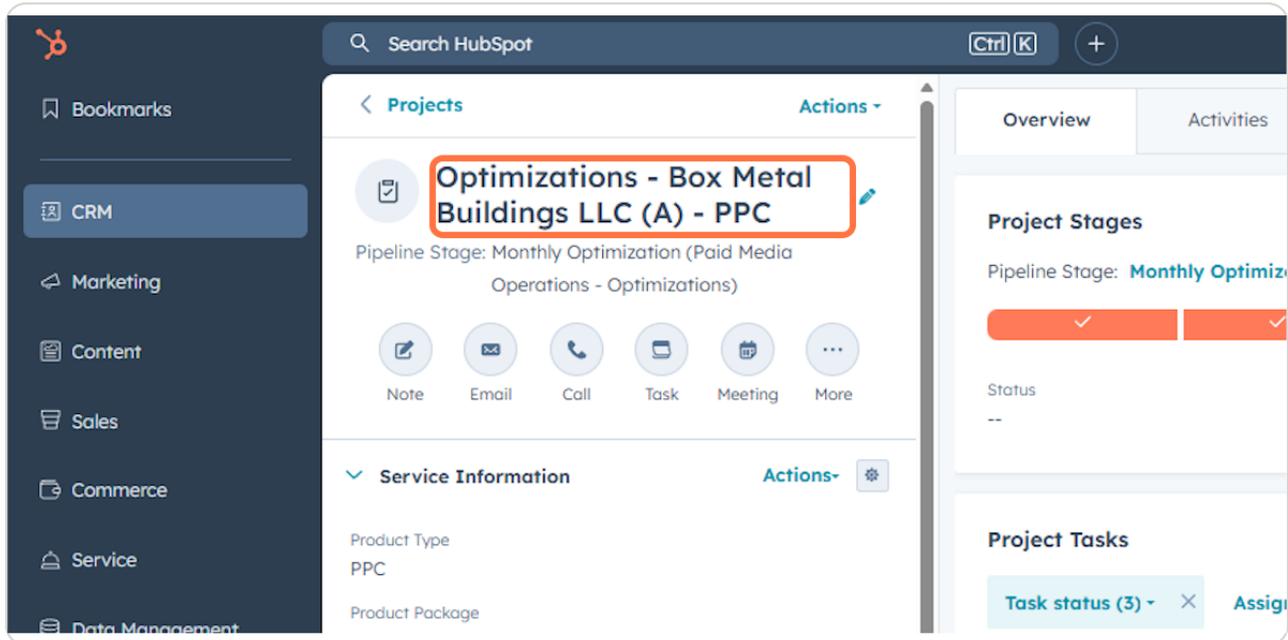
Jan 08, 2026

Last Updated

Jan 08, 2026

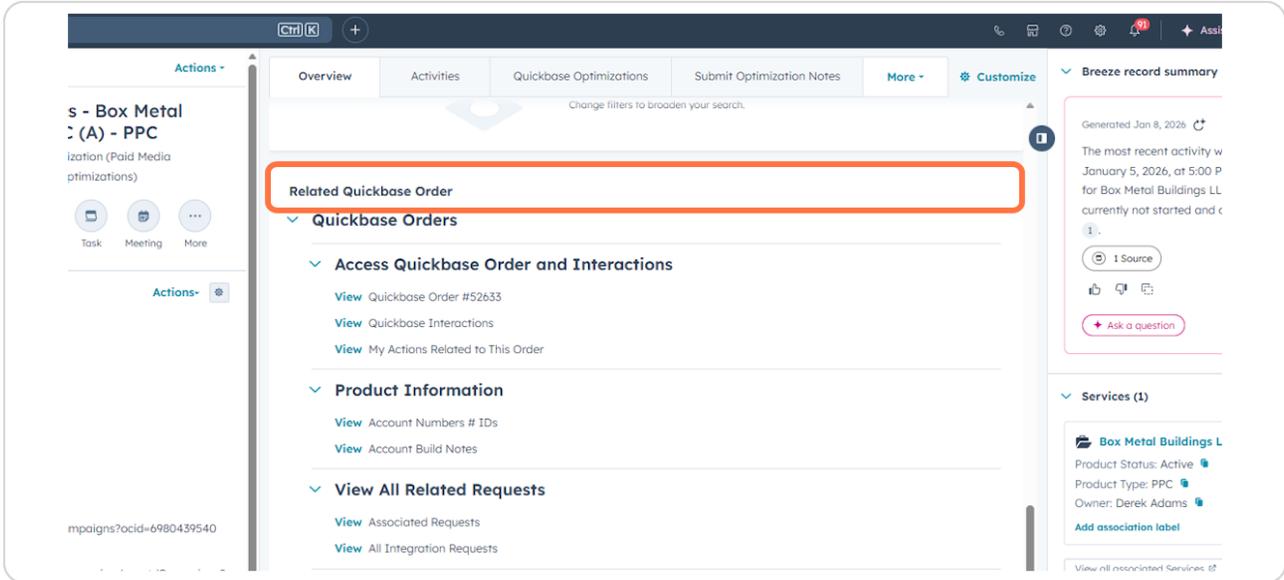
STEP 1

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



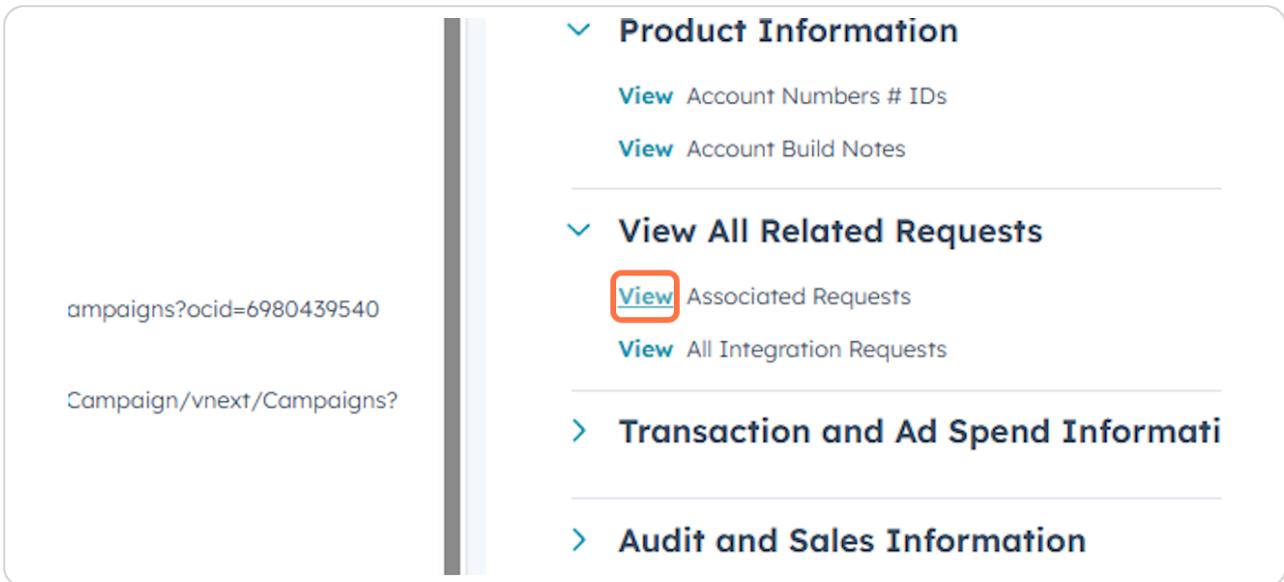
STEP 2

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.



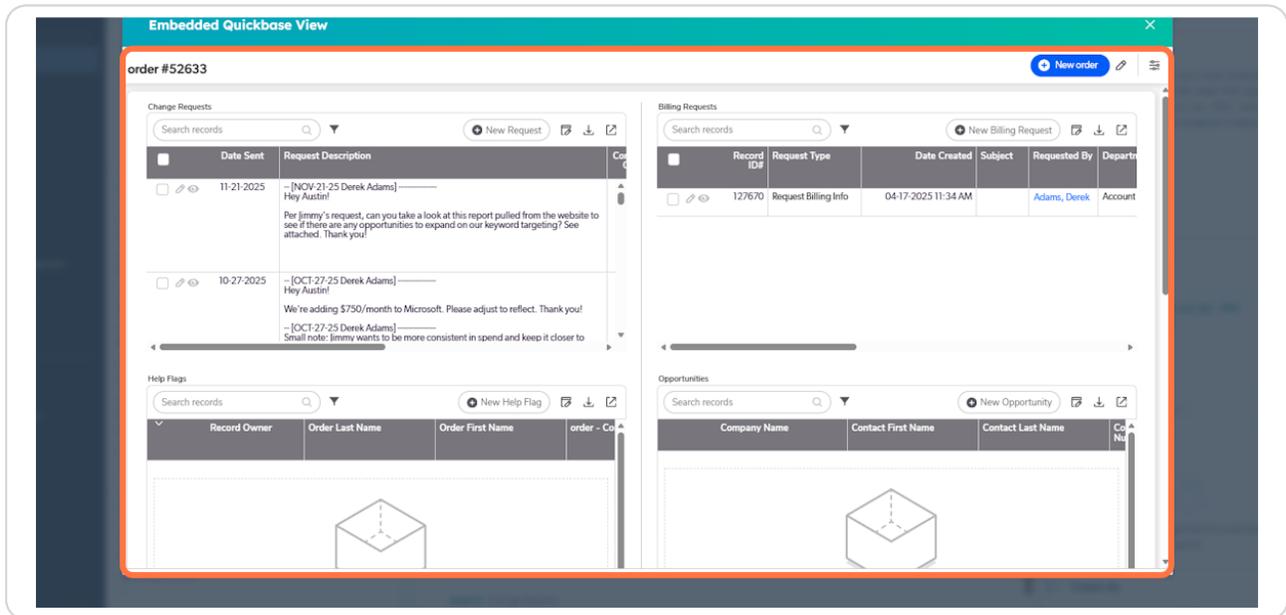
STEP 3

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



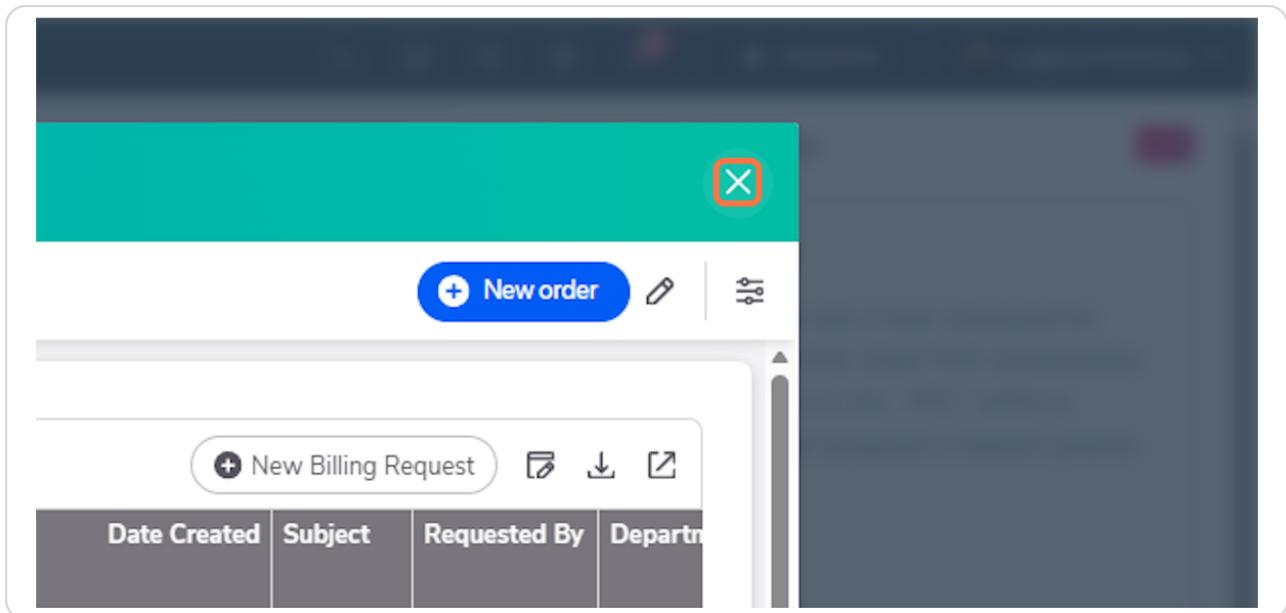
STEP 4

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.



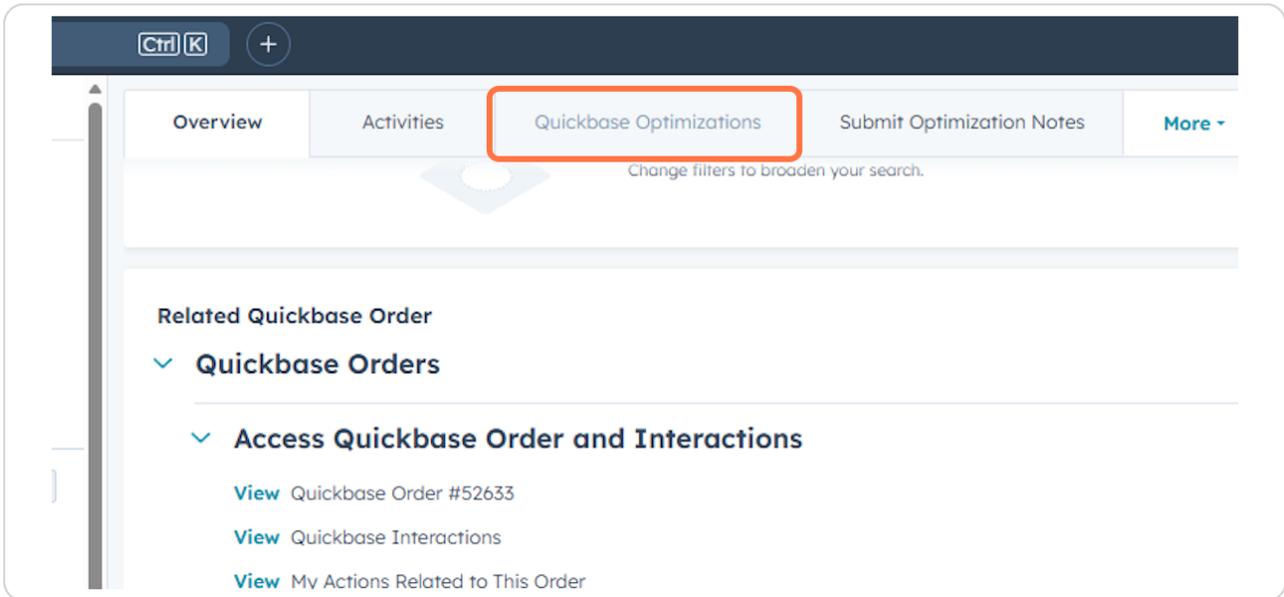
STEP 5

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



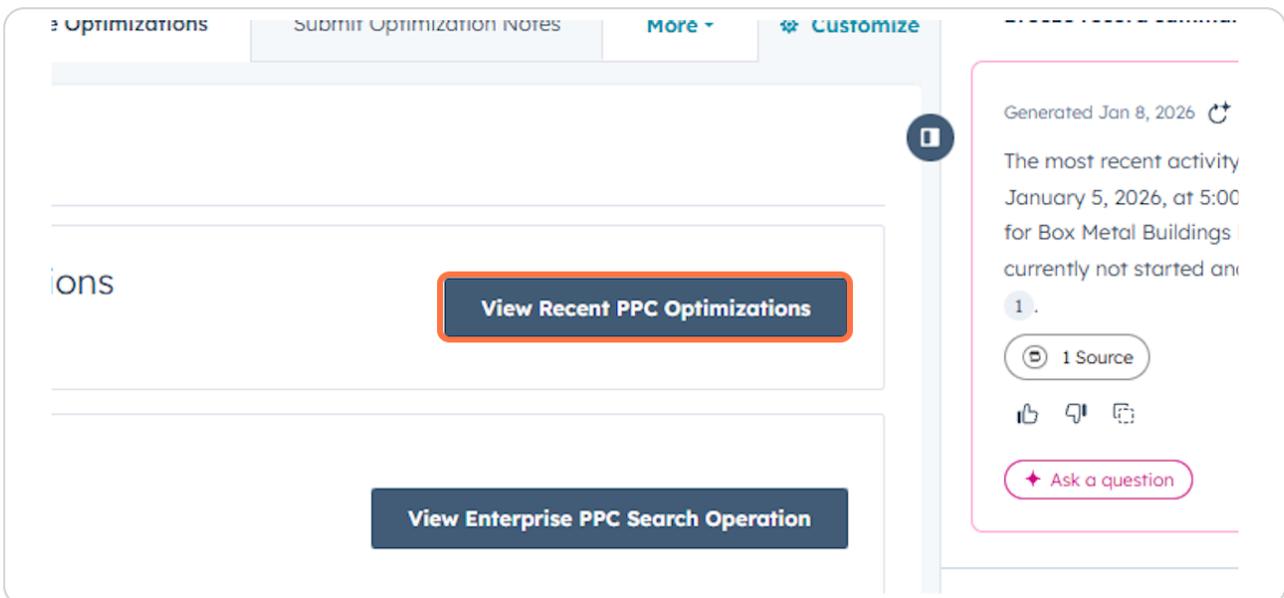
STEP 6

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



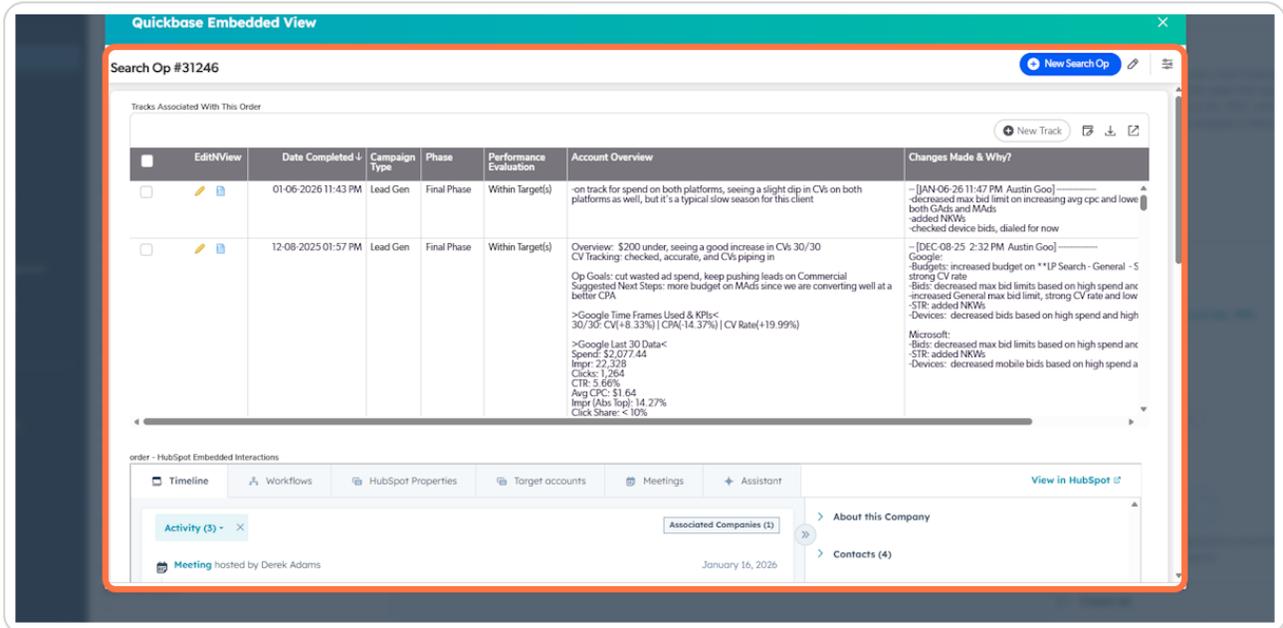
STEP 7

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



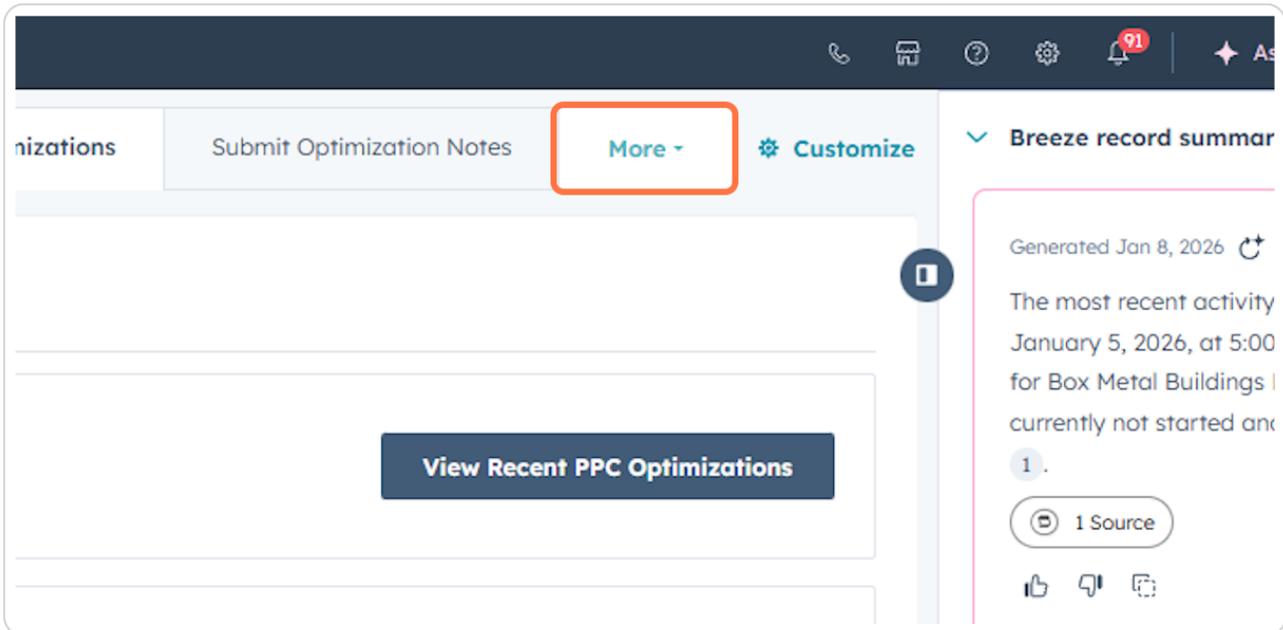
STEP 8

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



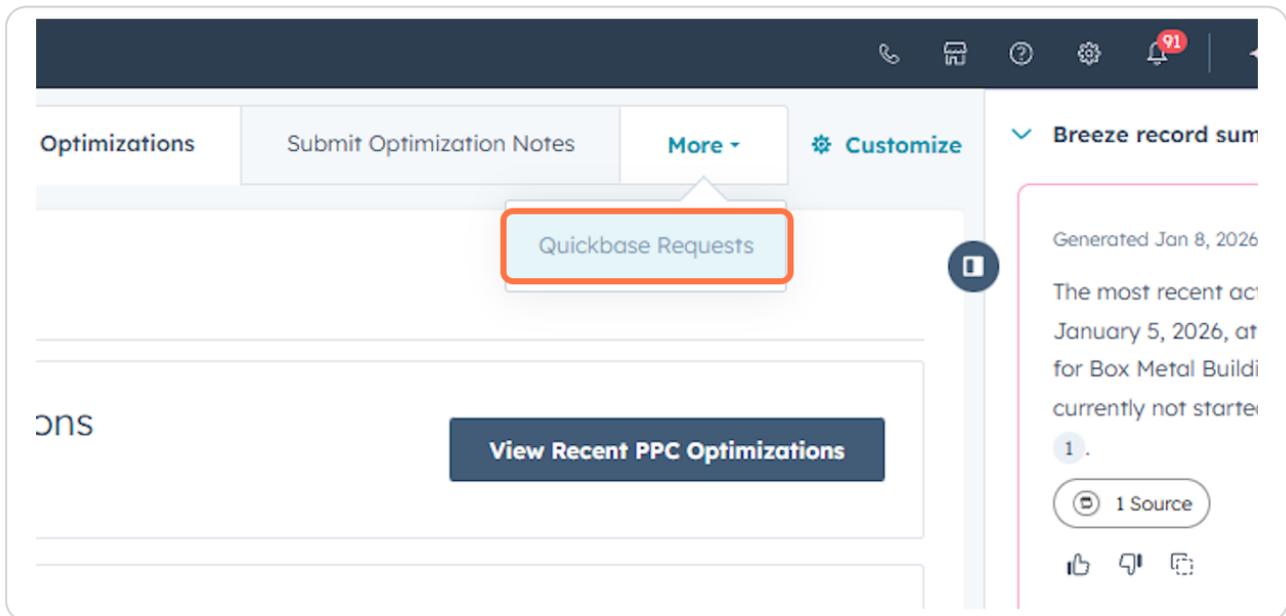
STEP 9

Click on the More dropdown tab.



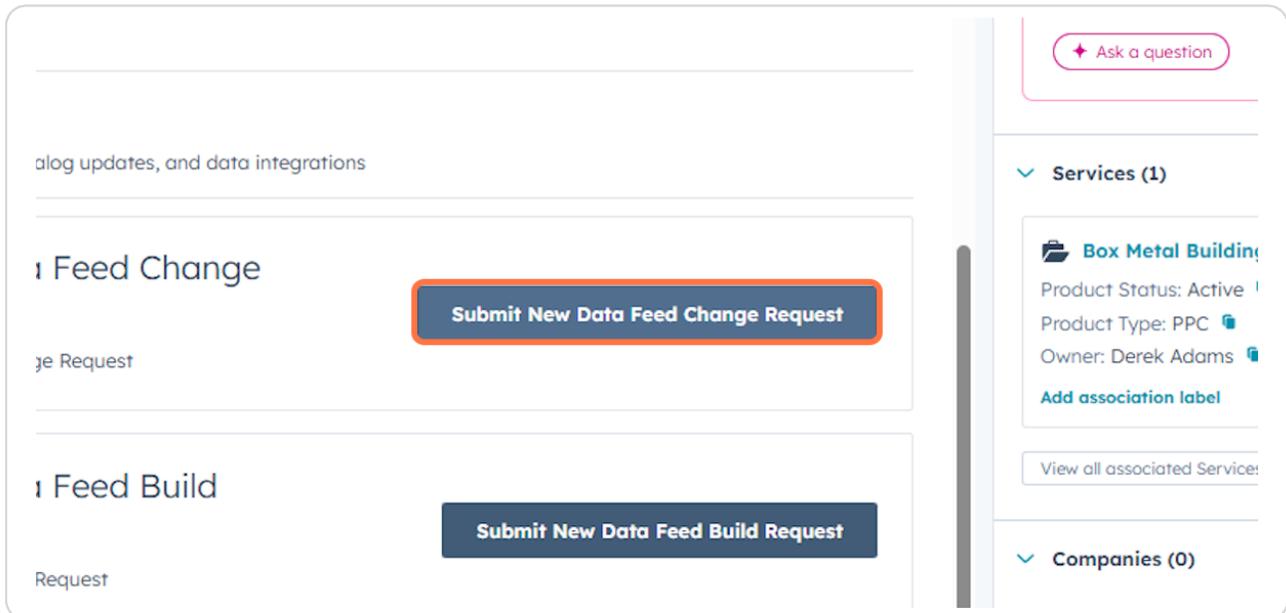
STEP 10

Select Quickbase Requests



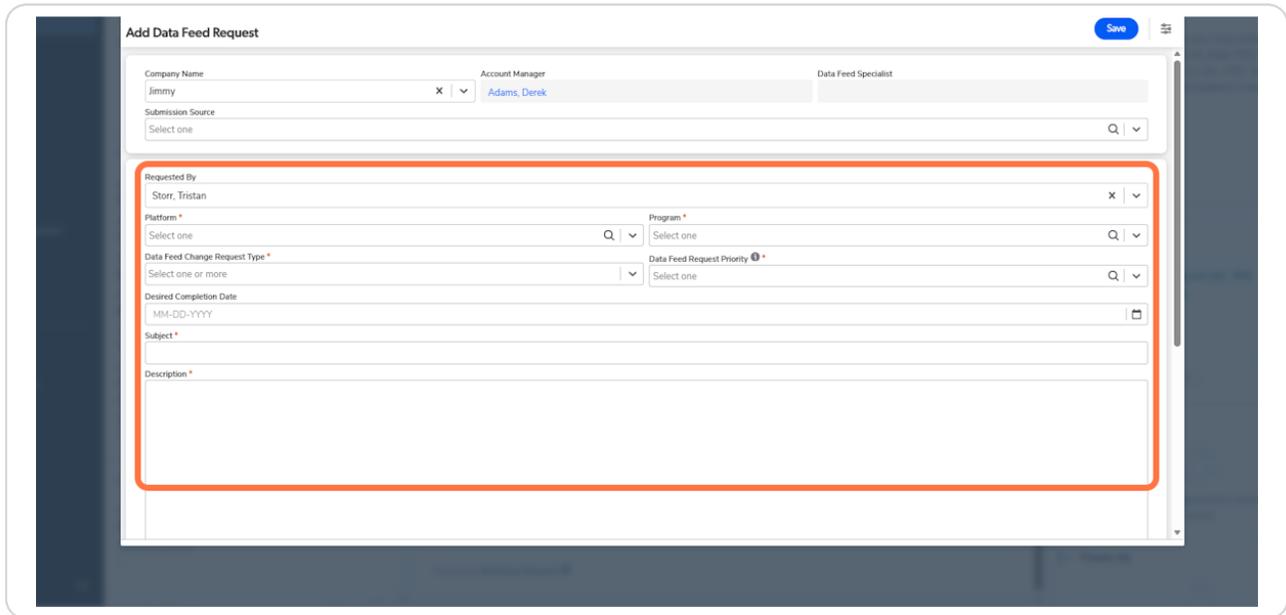
STEP 11

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

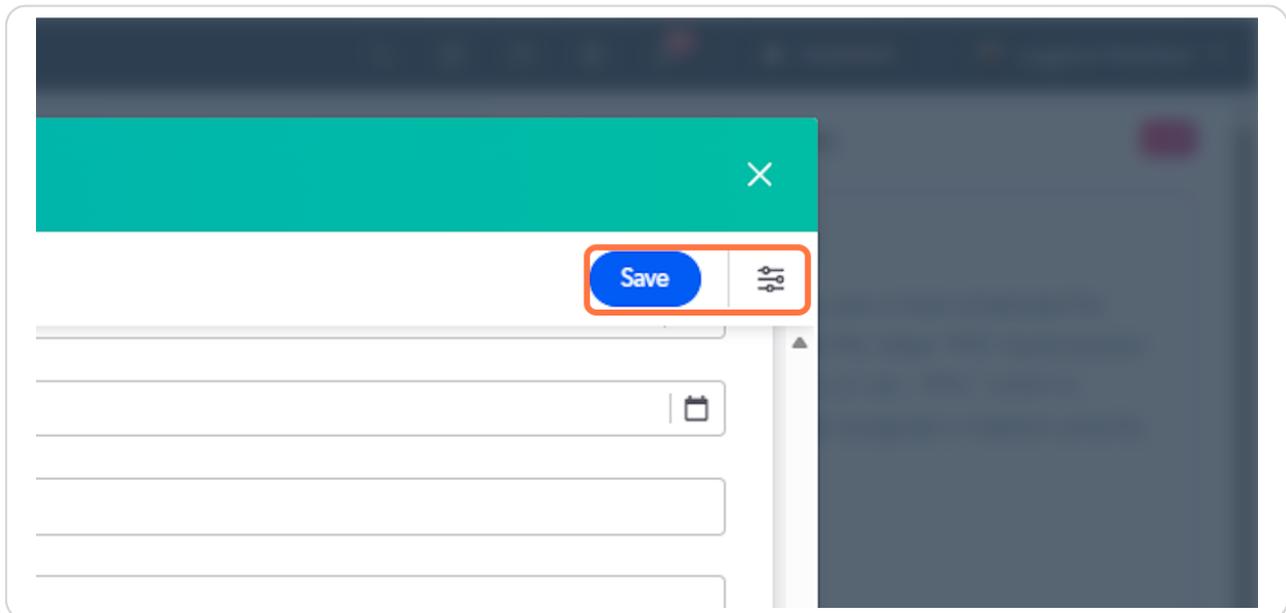
Selecting one of these options will open a similar modal view, this time with the ability to add information to a form.



The screenshot shows a modal window titled "Add Data Feed Request" with a blue "Save" button in the top right corner. The form contains several fields: "Company Name" (text input with "Jimmy" and a dropdown arrow), "Account Manager" (text input with "Adams, Derek" and a dropdown arrow), and "Data Feed Specialist" (text input). Below these is a "Submission Source" dropdown menu. A large orange rectangular box highlights the "Requested By" section, which includes a dropdown menu with "Storr, Tristan" selected, a "Platform" dropdown, a "Program" dropdown, a "Data Feed Change Request Type" dropdown, and a "Data Feed Request Priority" dropdown. Below these are fields for "Desired Completion Date" (with a date picker icon) and "Subject" (text input). At the bottom of the highlighted area is a "Description" text area.

STEP 13

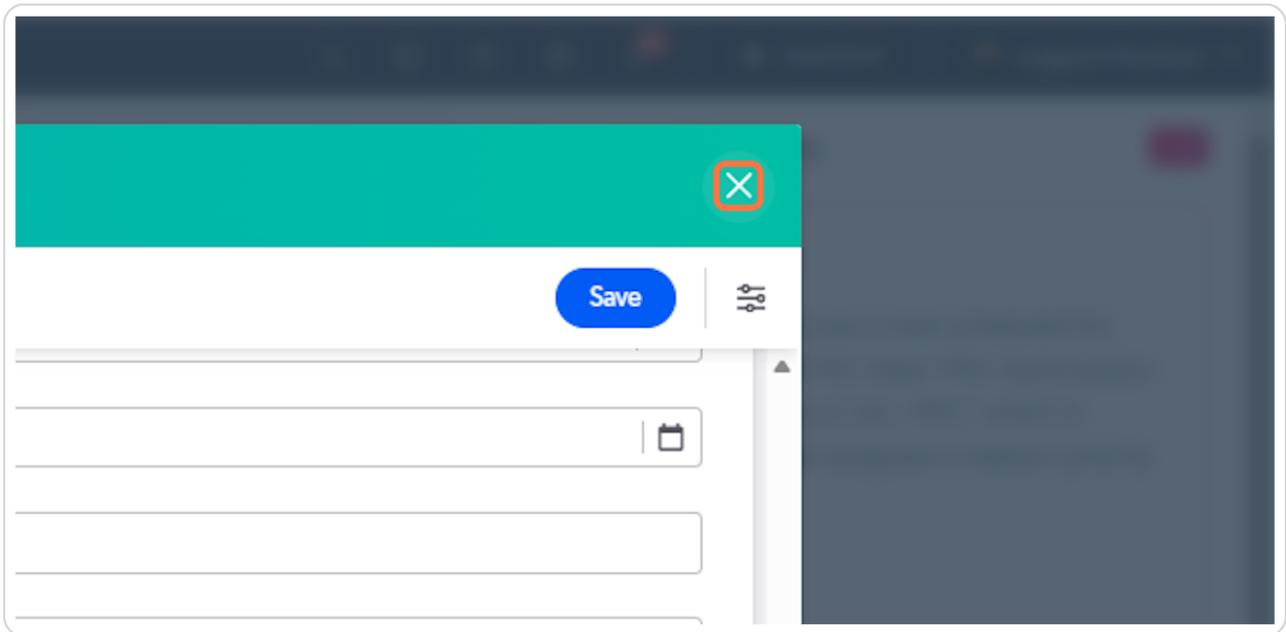
When you have completed filling the form, hit "Save" to create the request within Quickbase.



This close-up view shows the bottom right corner of the modal form. A blue "Save" button is highlighted with an orange border. To its right is a settings icon (three vertical bars with a gear). Below the button are several empty text input fields and a date picker icon.

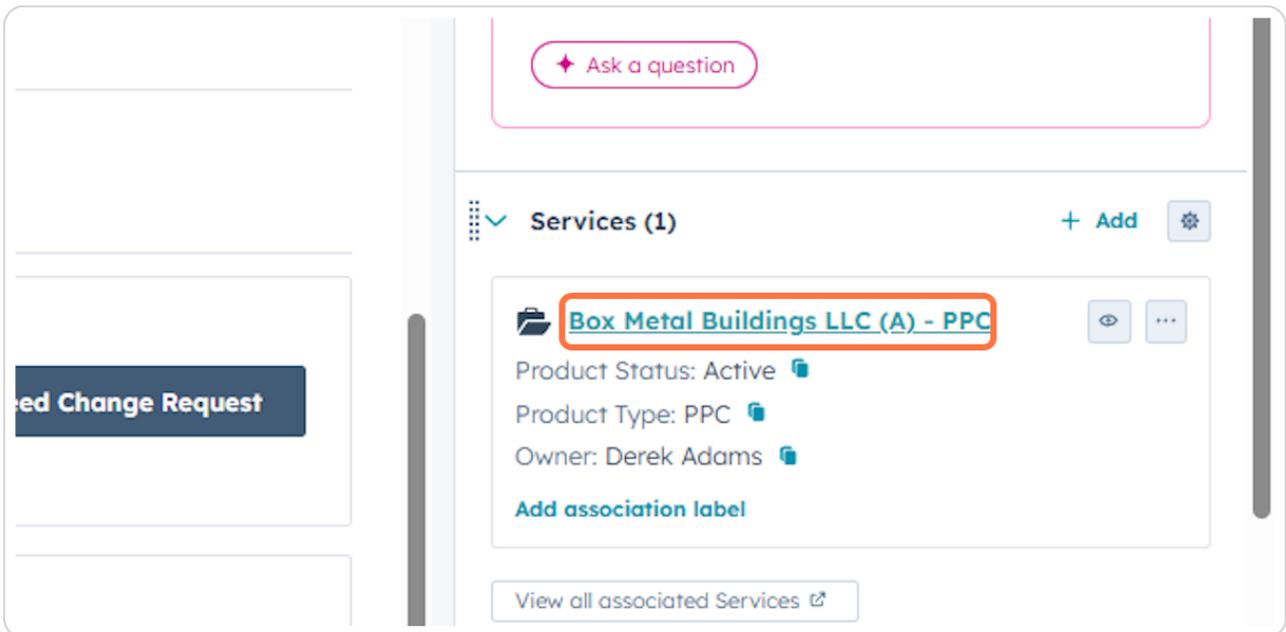
STEP 14

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

The screenshot shows a CRM interface with a sidebar on the left containing navigation icons (mail, call, task, meeting, more) and a list of data items. The main content area features a 'Quickbase Orders' card, which is highlighted with an orange border. This card is organized into several sections:

- Access Quickbase Order and Interactions**
 - [View](#) Quickbase Order #52633
 - [View](#) Quickbase Interactions
 - [View](#) My Actions Related to This Order
- Product Information**
 - [View](#) Account Numbers # IDs
 - [View](#) Account Build Notes
- View All Related Requests**
 - [View](#) Associated Requests
 - [View](#) All Integration Requests
- Transaction and Ad Spend Information**
- Audit and Sales Information**
- Dashboard Settings**
- Common Requests**
 - [Submit](#) Change Request
 - [Submit](#) Billing Request

On the right side of the interface, there are additional sections for 'Companies (1)', 'Services (0)', and 'Projects (2)'. The 'Companies' section lists 'Box Metal Buildings LLC' with details like 'Company Domain Name: boxmetalbuilding' and 'Phone Number: 5017106356'. The 'Projects' section shows 'Optimizations - Box Metal Buildings' with a status of '--' and a target due date of '--'.

STEP 17

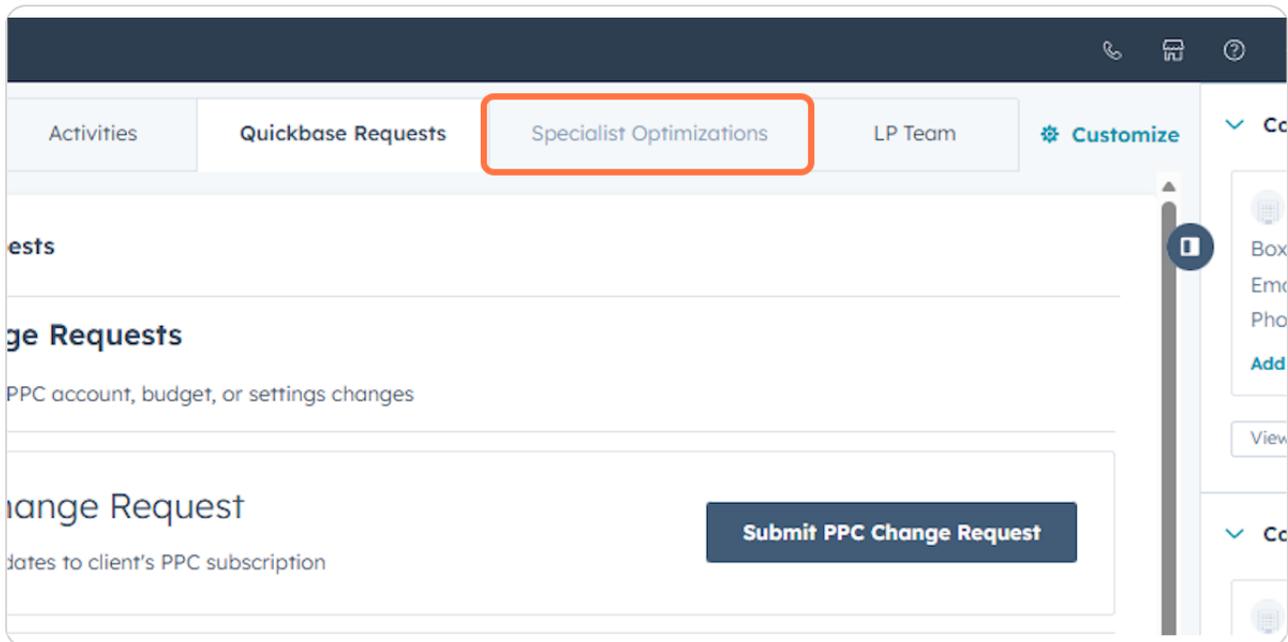
Quickbase Requests Tab on Services

The screenshot displays a CRM interface with a dark blue header bar containing a search icon and a plus sign. Below the header is a navigation bar with five tabs: 'Overview', 'Activities', 'Quickbase Requests', 'Specialist Optimizations', and 'LP Team'. The 'Quickbase Requests' tab is highlighted with an orange border. Below the navigation bar, there is a search filter area with the text 'Change filters to broaden your search.' and a magnifying glass icon. The main content area shows a 'Related Quickbase Order' section with a 'Quickbase Orders' card. This card is expanded to show the 'Access Quickbase Order and Interactions' section, which includes two links:

- [View](#) Quickbase Order #52633
- [View](#) Quickbase Interactions

STEP 18

Specialist Optimizations Tab on Services



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