

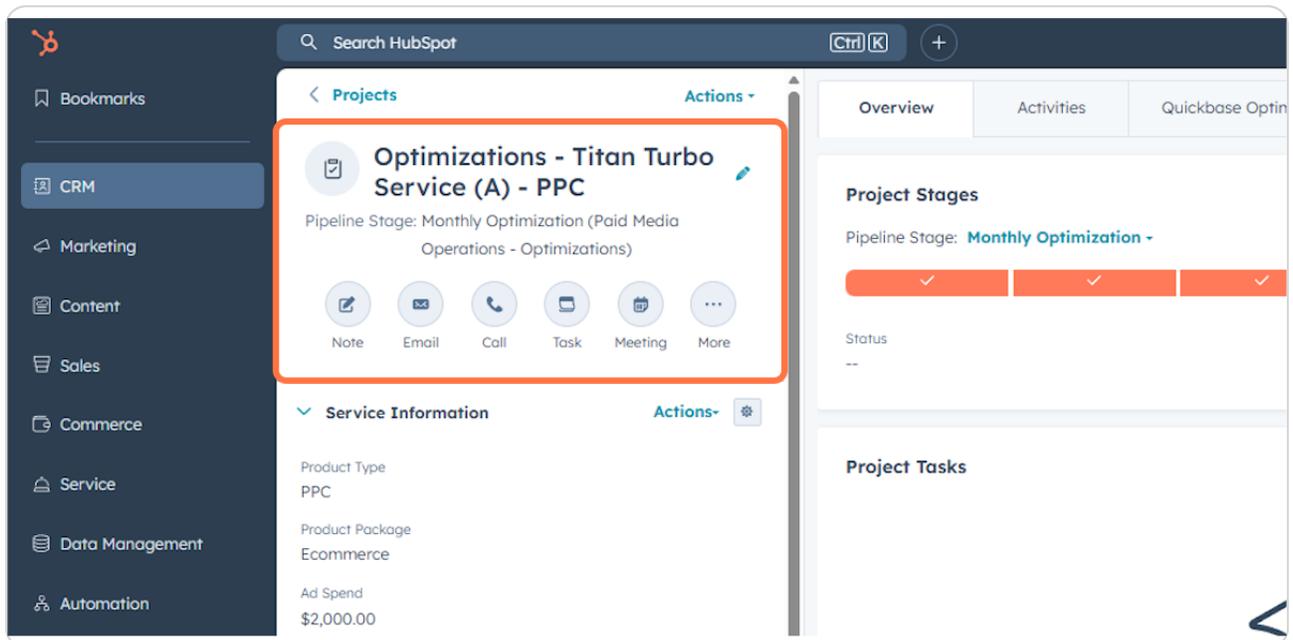
Navigating Records In HubSpot

23 Steps [View most recent version on Tango.ai](#) 

Created by	Creation Date	Last Updated
Logical Position	Jan 13, 2026	Jan 13, 2026

STEP 1

You can see the title of the record you are viewing in HubSpot in the top left. The standard activity bar will appear across all HubSpot records to provide a standard User Interface.



STEP 2

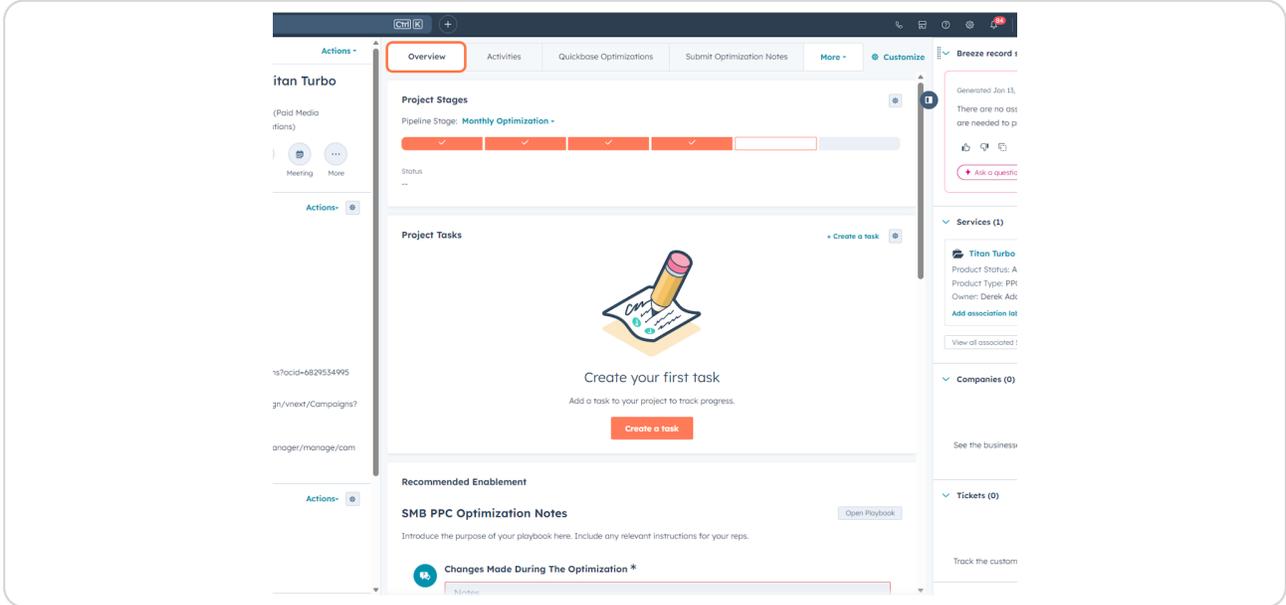
The left column of the record will contain properties relevant to the record. These vary based on if you are viewing a Project, Company, Service or Ticket. Properties are divided into individual sections.

The screenshot displays a CRM record page for "Optimizations - Titan Turbo Service (A) - PPC". The interface is divided into several sections:

- Left Sidebar (highlighted with an orange box):** Contains navigation links for CRM, Marketing, Content, Sales, Commerce, Service, Data Management, Automation, Reporting, Breeze, Development, and Partner. Below these are two sections:
 - Service Information:** Lists Product Type (PPC), Product Package (Ecommerce), Ad Spend (\$2,000.00), and Management Fee (\$749.00). It also includes Google Ads, Microsoft, and Meta Deep Links.
 - Optimization Information:** Shows "Time in current stage" as 4.7 days and a "Submit Optimization" button.
- Main Content Area:**
 - Overview:** Shows "Project Stages" with a progress bar for "Monthly Optimization" and a "Status" field.
 - Project Tasks:** Features a "Create your first task" prompt with a "Create a task" button.
 - Recommended Enablement:** Includes "SMB PPC Optimization Notes" and an "Open Playbook" button.
 - Changes Made During The Optimization:** A section for tracking updates.
- Right Sidebar:**
 - Breeze record summary:** Generated on Jan 13, 2026, with a note that no activities are associated.
 - Services (1):** Lists "Titan Turbo Service (A) - PPC" with details like Product Status (Active), Product Type (PPC), and Owner (Derek Adams).
 - Companies (0):** A section for associated businesses.
 - Tickets (0):** A section for associated customer requests.

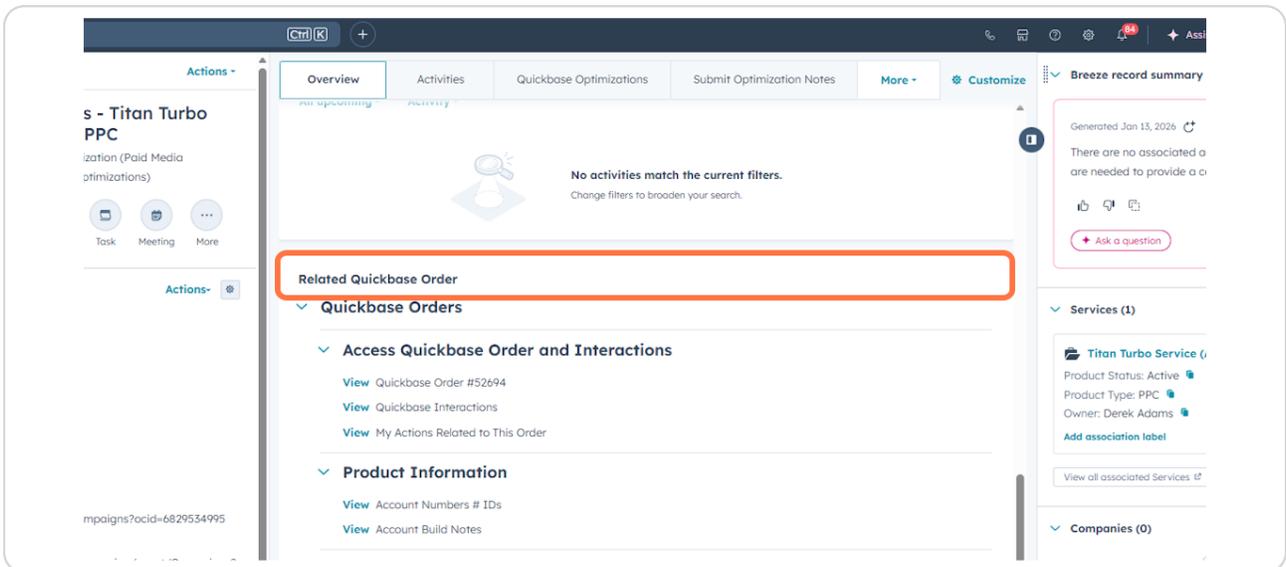
STEP 3

The central column of the page is where most of your action will be taken. You have several tabs available to you depending on the record type. Start out on the Overview tab. Here you'll find several different cards showing stages, tasks, and playbooks.



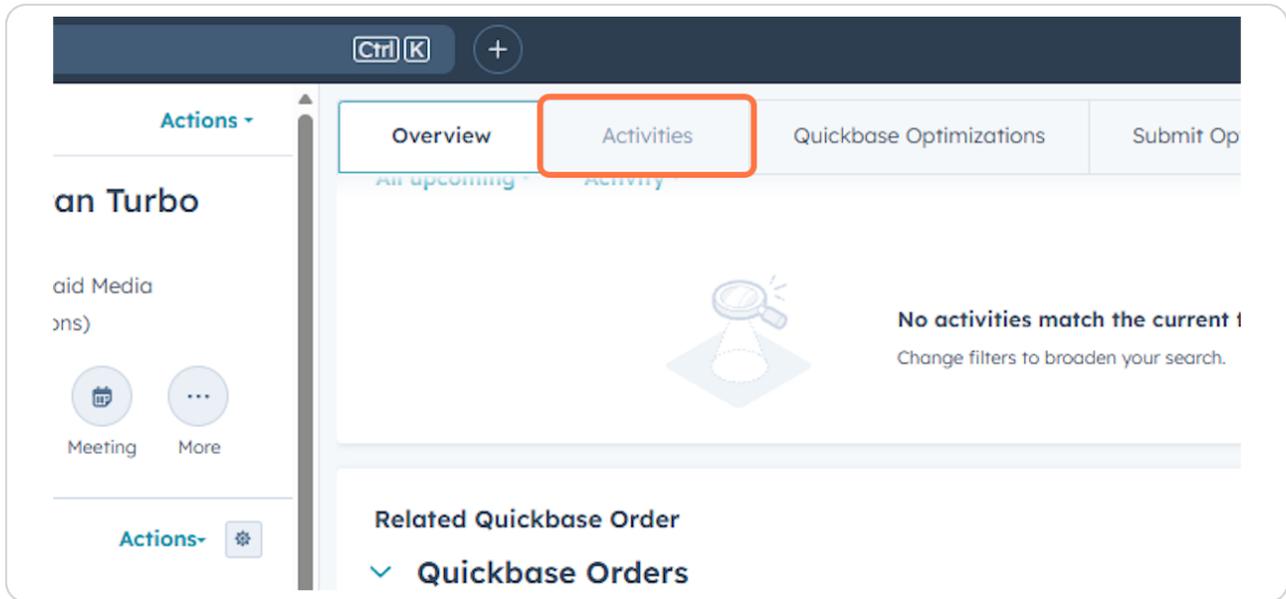
STEP 4

Further down the Overview tab, on the Project and Service record, you'll find links back to legacy Quickbase data.



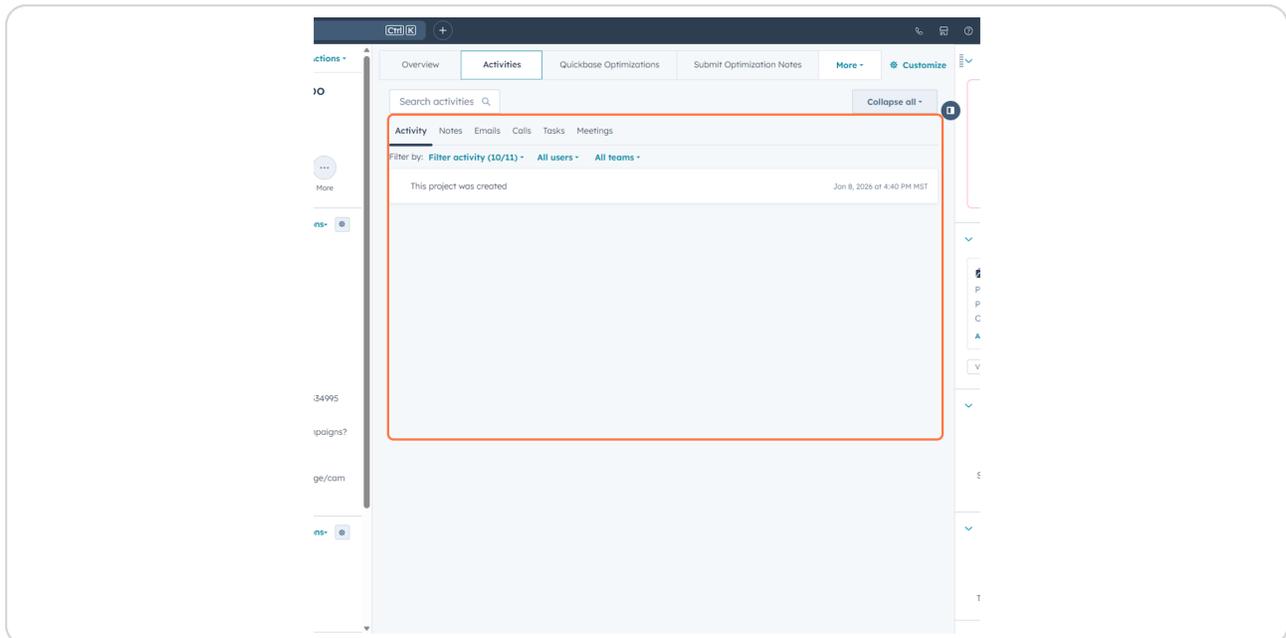
STEP 5

Click on Activities tab to see the Activity feed related to the record.



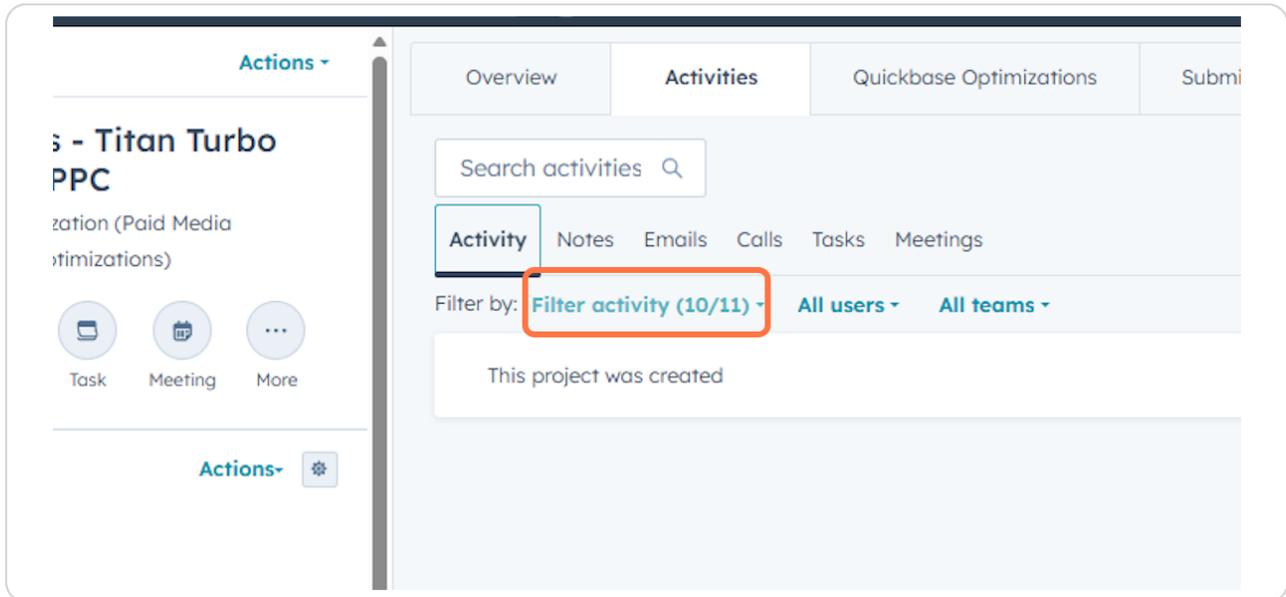
STEP 6

Here, all activity cards including tasks, notes, and communications will show that are associated to the record, in chronological order. Activities can also be pinned to the top of the activity feed for visibility purposes.



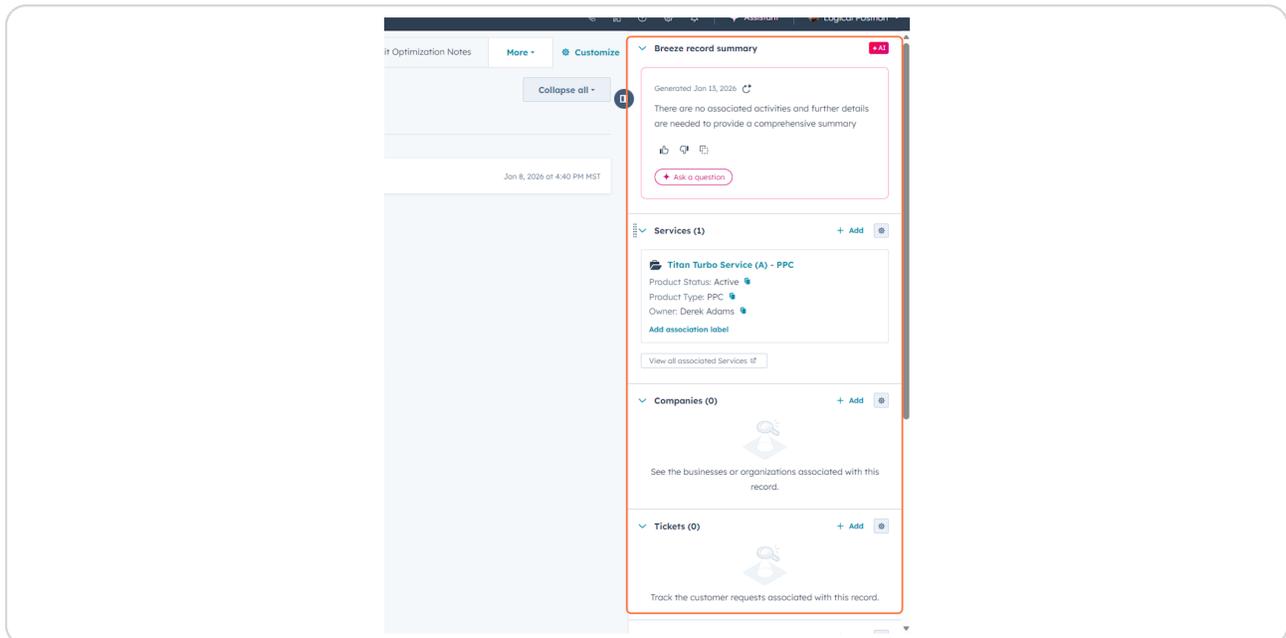
STEP 7

You can filter activities in the feed using the "Filter Activity" dropdown or quick select one of the activity types above.



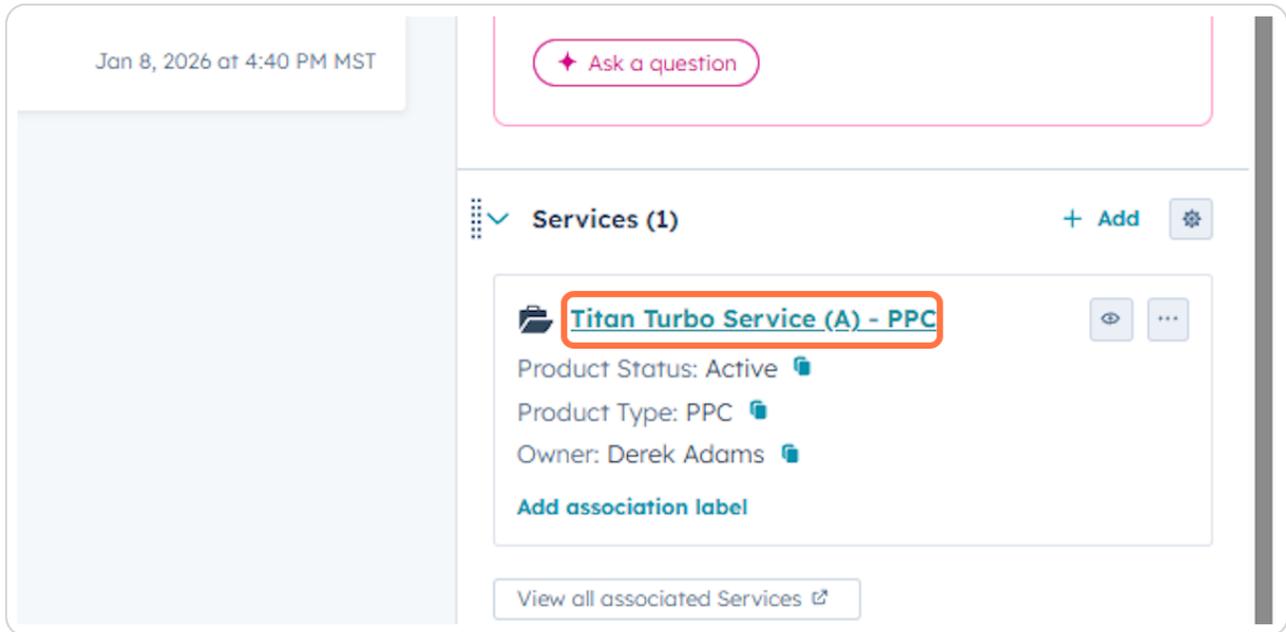
STEP 8

On the right side of a HubSpot record, you will find Record associations. These show any record that is associated or tied to the record you are viewing.



STEP 9

Click on the record title to access it directly



Jan 8, 2026 at 4:40 PM MST

Ask a question

Services (1) + Add

Titan Turbo Service (A) - PPC Eye More

Product Status: Active
Product Type: PPC
Owner: Derek Adams

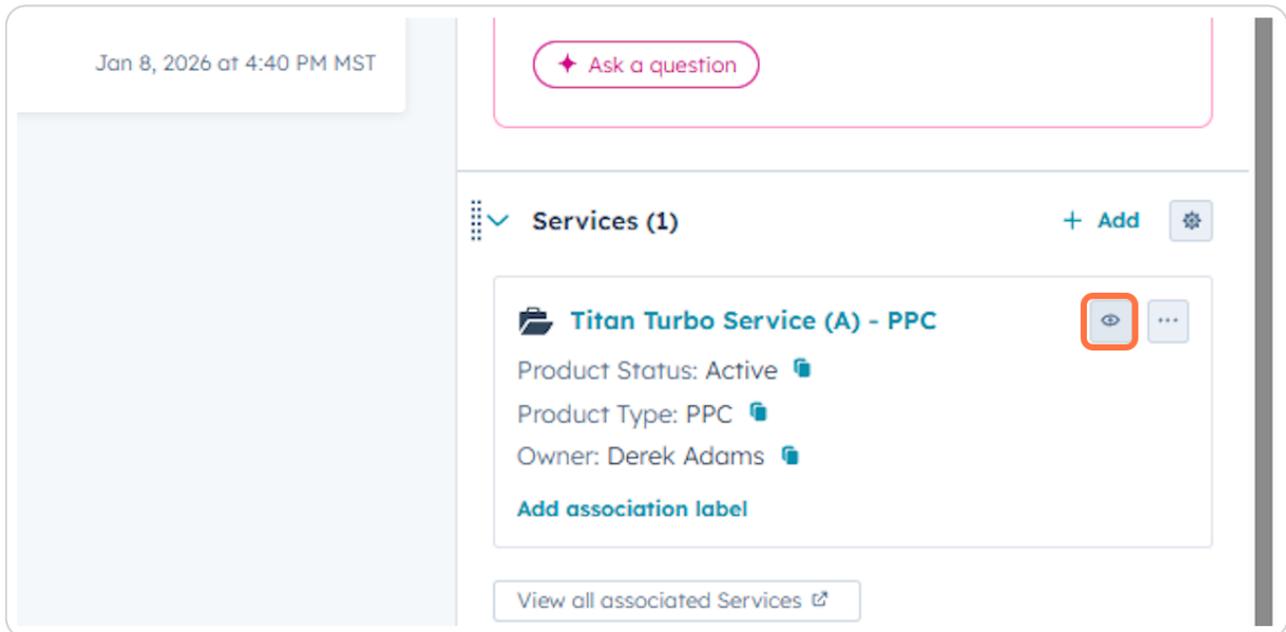
Add association label

View all associated Services

Detailed description: This screenshot shows a user interface for a service record. At the top left, there is a timestamp 'Jan 8, 2026 at 4:40 PM MST'. To the right is a pink button labeled 'Ask a question'. Below this is a section titled 'Services (1)' with a '+ Add' button and a settings gear icon. A single service card is displayed, titled 'Titan Turbo Service (A) - PPC'. The title is highlighted with a red rectangular box. To the right of the title are two icons: an eye icon and a three-dot menu icon. Below the title, the card lists 'Product Status: Active', 'Product Type: PPC', and 'Owner: Derek Adams', each with a small lock icon. At the bottom of the card is a link 'Add association label'. Below the card is a button 'View all associated Services' with an external link icon.

STEP 10

Hover your mouse over the right corner of the card and select the "Eye" icon to preview a record.



Jan 8, 2026 at 4:40 PM MST

Ask a question

Services (1) + Add

Titan Turbo Service (A) - PPC Eye More

Product Status: Active
Product Type: PPC
Owner: Derek Adams

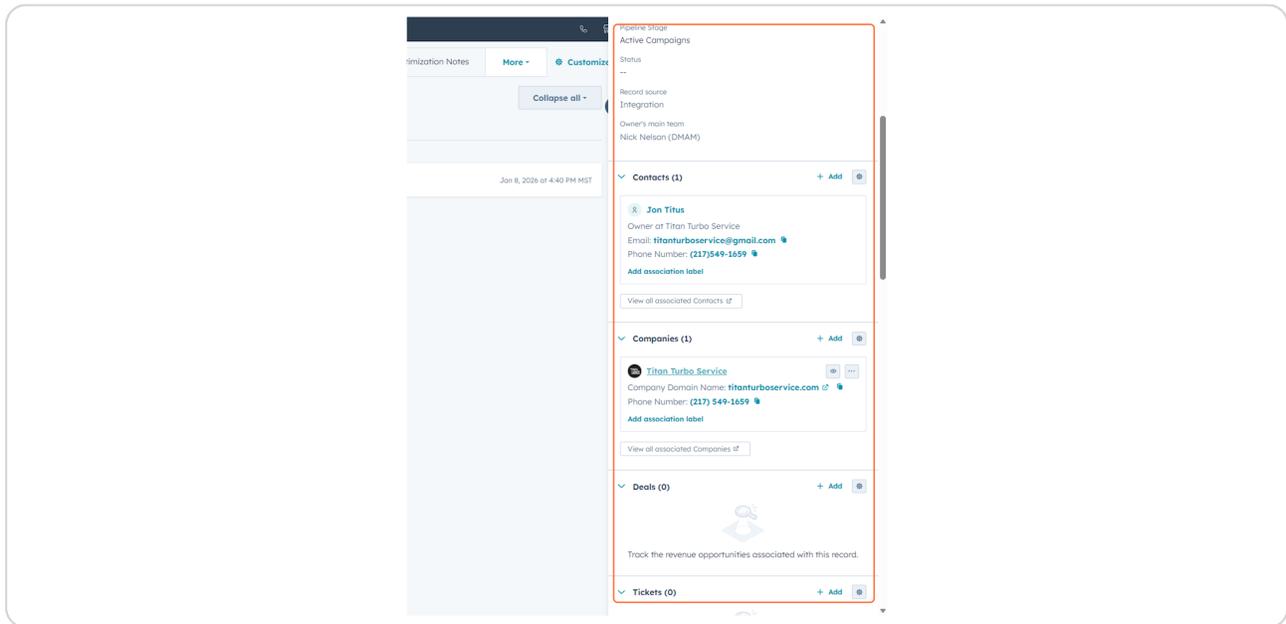
Add association label

View all associated Services

Detailed description: This screenshot is identical to the one in Step 9, but the eye icon in the top right corner of the service card is now highlighted with a red rectangular box, indicating it has been selected for preview.

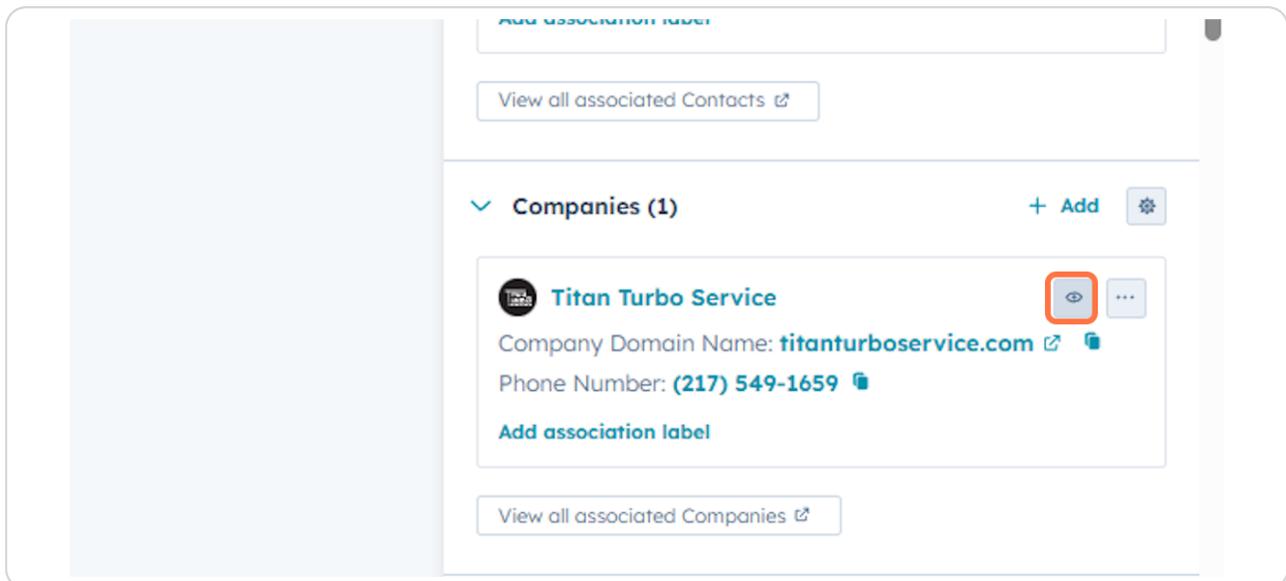
STEP 11

From the record preview window, you can see properties and other record associations of the record you are previewing.



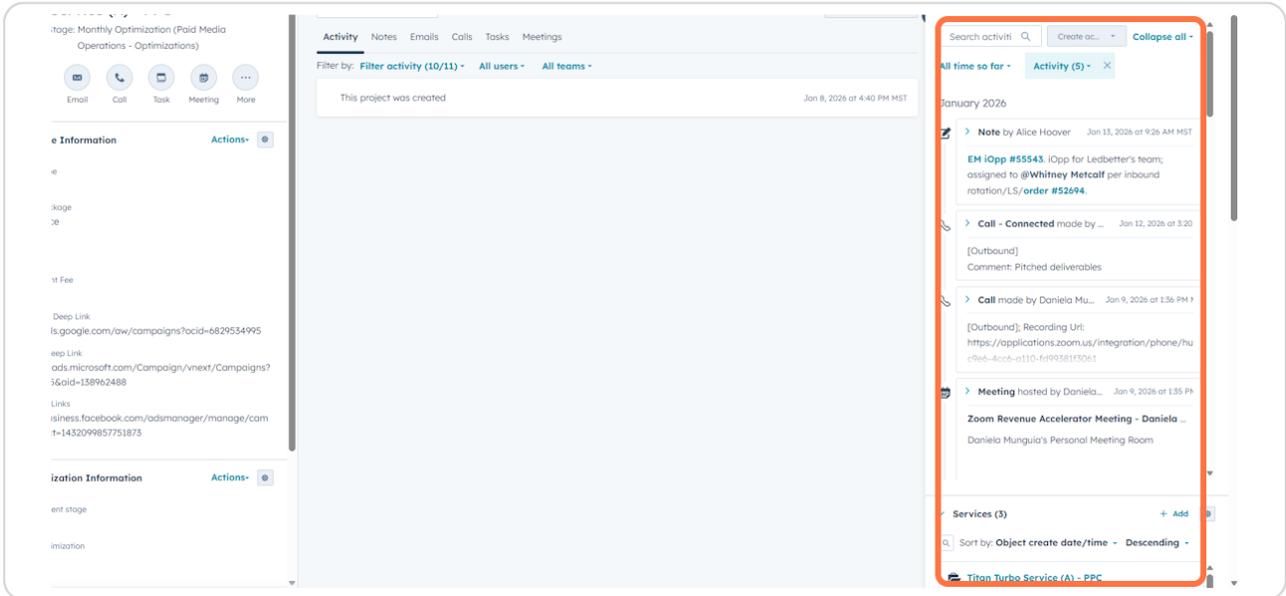
STEP 12

You can open record previews of other records from preview menu. This allows you to navigate to tangentially associated records without leaving your original record.



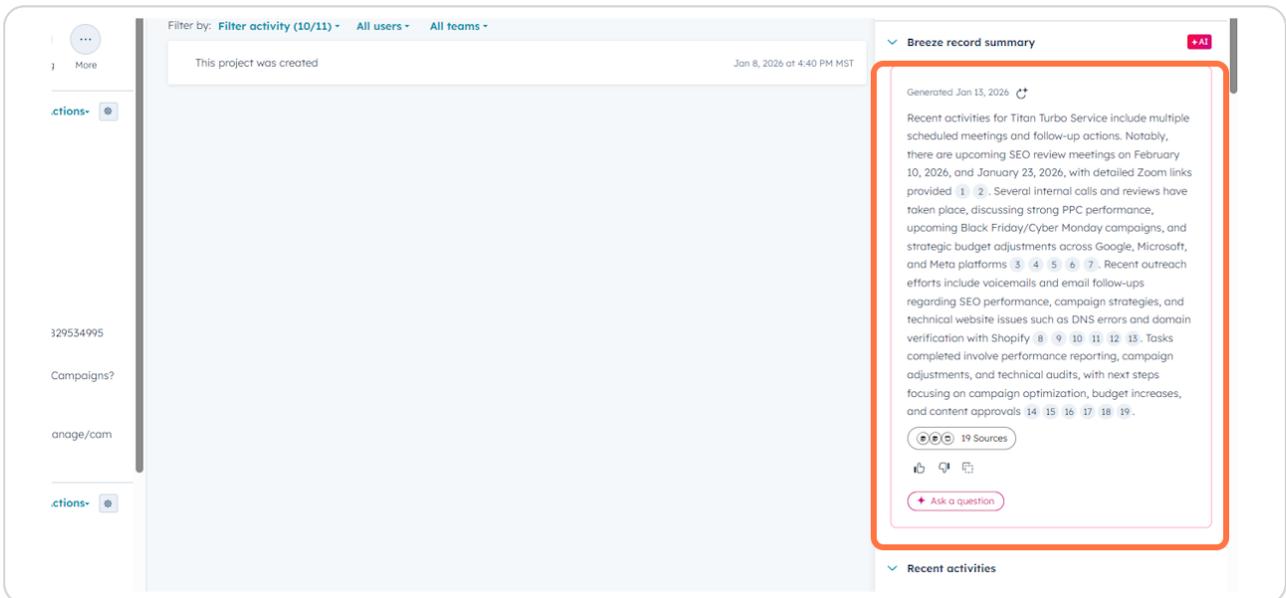
STEP 13

Company record previews, for example, allow you to see recent activities associated with the Company. This is useful for viewing Client Interactions from the



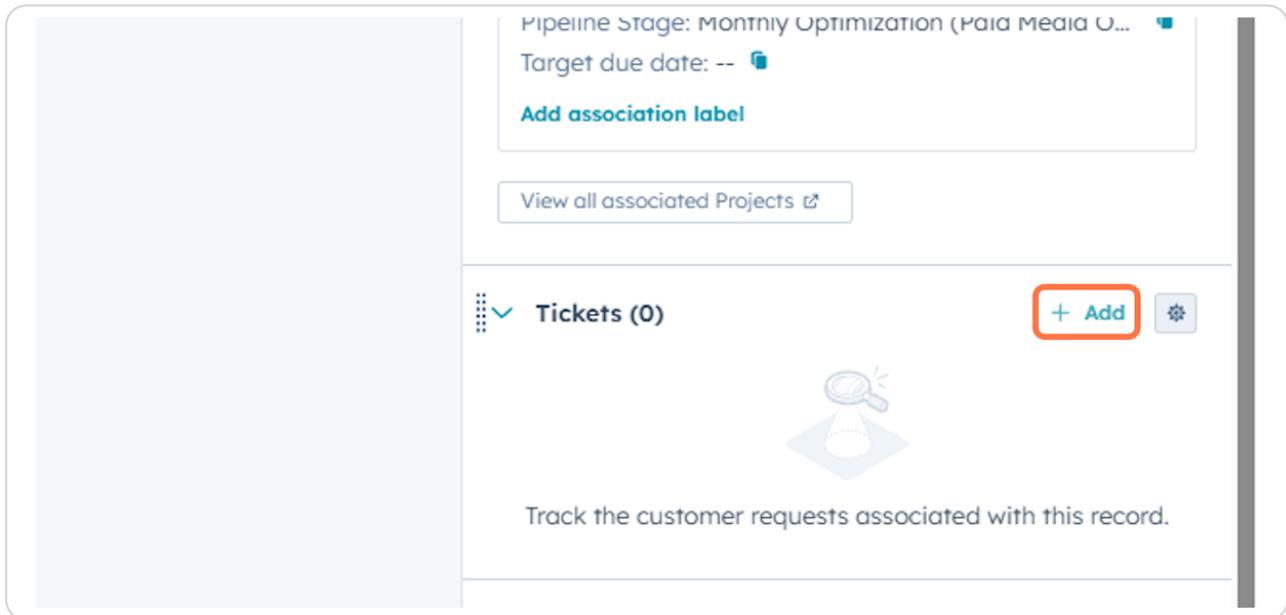
STEP 14

Many record previews also feature a "Breeze Summary" card which provides an AI overview of the activities related to the record you're previewing.



STEP 15

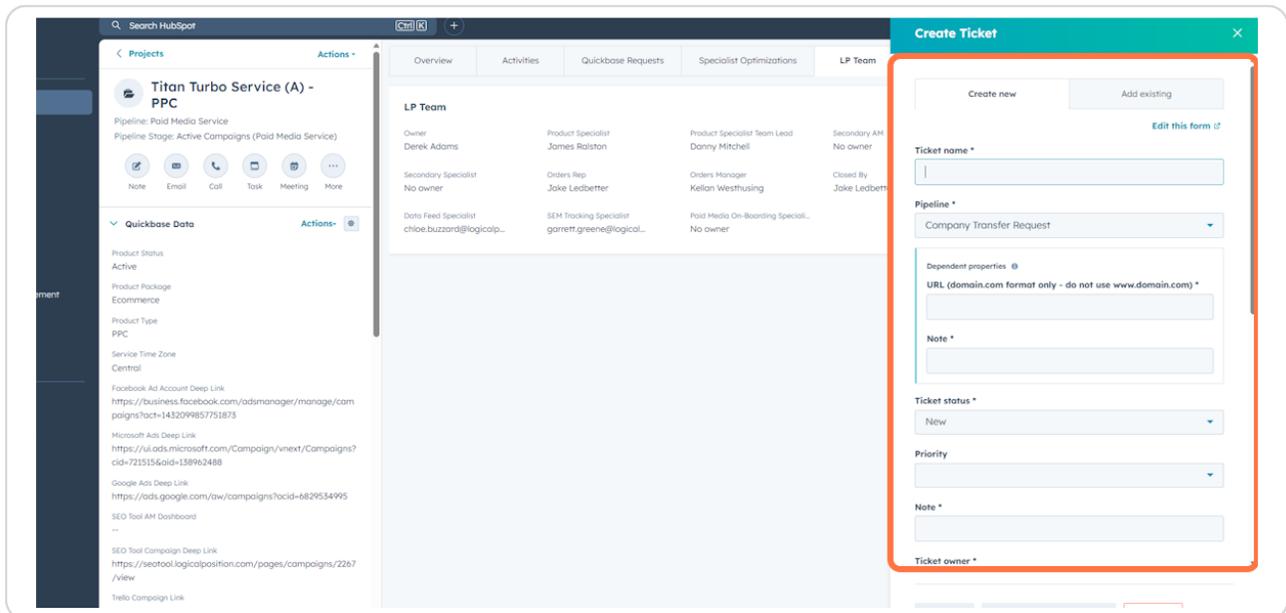
To add new records, for example a ticket, select the "+Add" button from the record you wish to have associated with the Ticket. In this case, it should be the Service record.



The screenshot shows a HubSpot record page for a project. At the top, it displays 'Pipeline Stage: Monthly Optimization (Paid Media O...' and 'Target due date: --'. Below this is a button labeled 'Add association label'. Further down is a button 'View all associated Projects'. The main section is titled 'Tickets (0)' and features a '+ Add' button highlighted with a red border, along with a settings gear icon. Below the title is a magnifying glass icon and the text 'Track the customer requests associated with this record.'

STEP 16

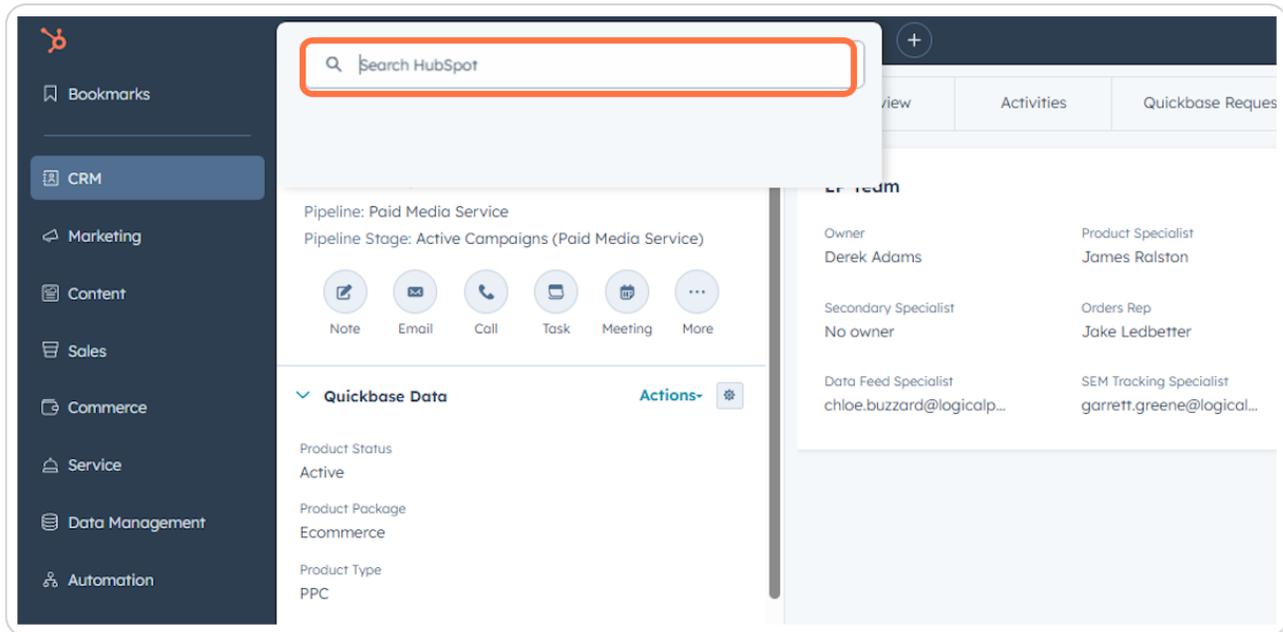
Fill out the record creation form.



The screenshot shows the HubSpot 'Create Ticket' form. The form is titled 'Create Ticket' and has a close button 'X'. It includes a 'Create new' button and an 'Add existing' button. Below these are 'Ticket name *' and 'Pipeline *' (set to 'Company Transfer Request'). There are also 'Dependent properties @' with a 'URL (domain.com format only - do not use www.domain.com) *' field, two 'Note *' fields, 'Ticket status *' (set to 'New'), 'Priority' (set to a dropdown), another 'Note *' field, and a 'Ticket owner *' field. The form is highlighted with a red border.

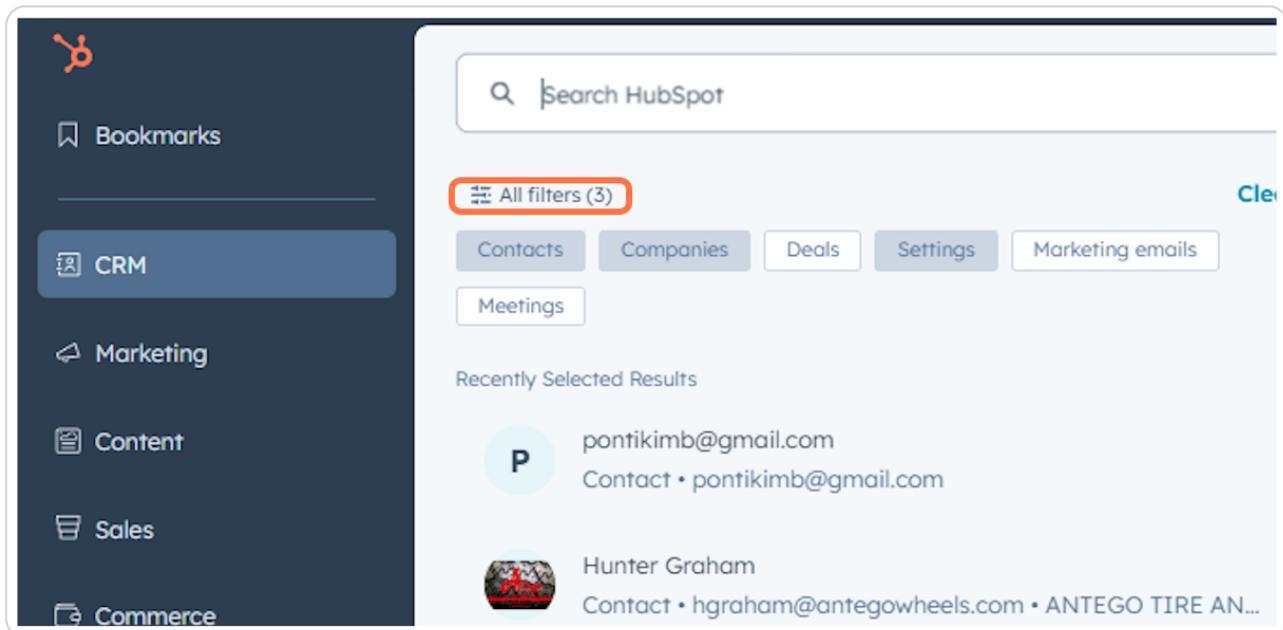
STEP 17

You can perform a global search within HubSpot using the Search bar in the top left of the interface.



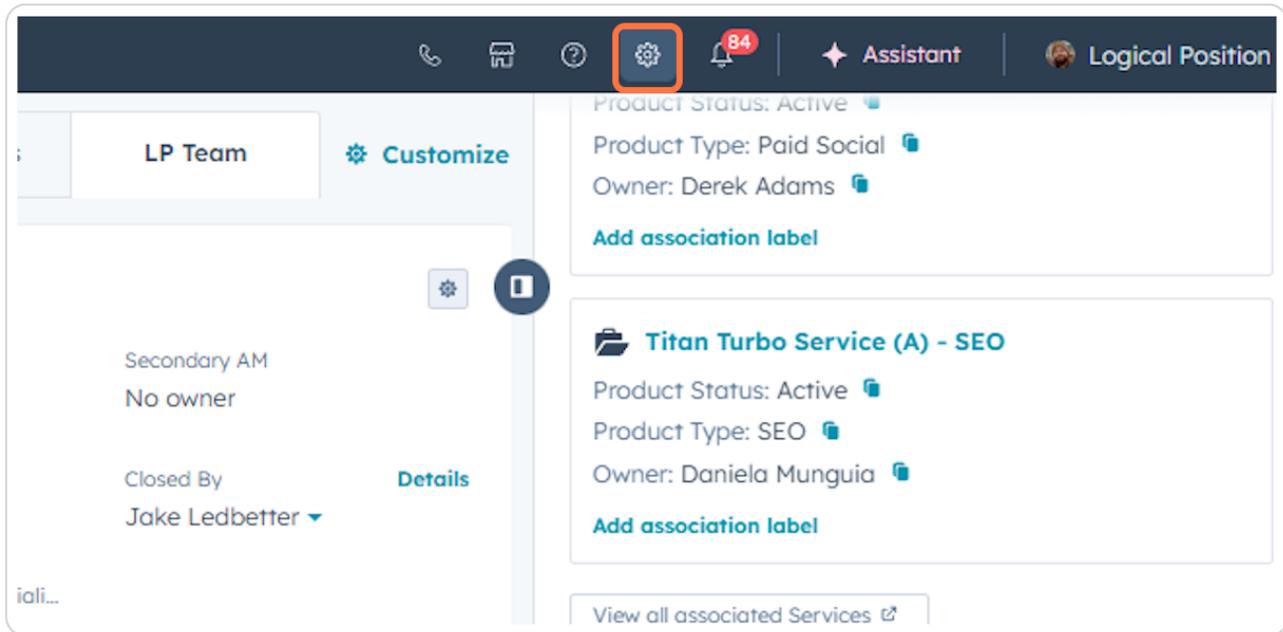
STEP 18

You can filter within your global search for more refined results



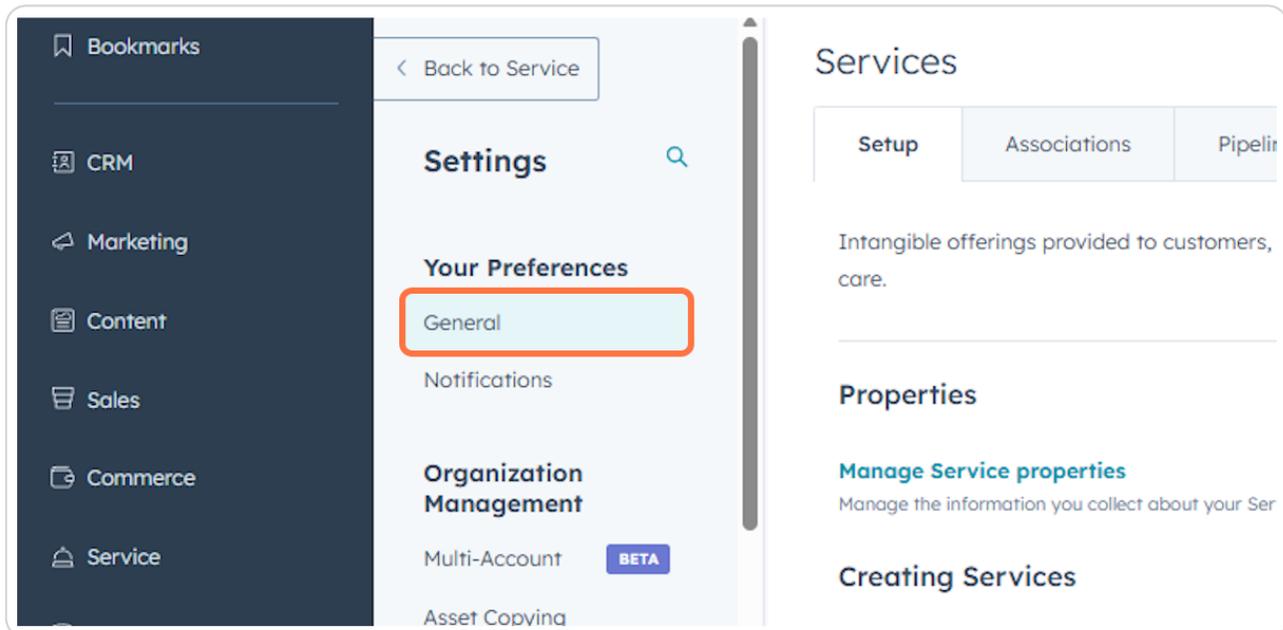
STEP 19

Access your settings by selecting the gear icon in the top right of the interface.



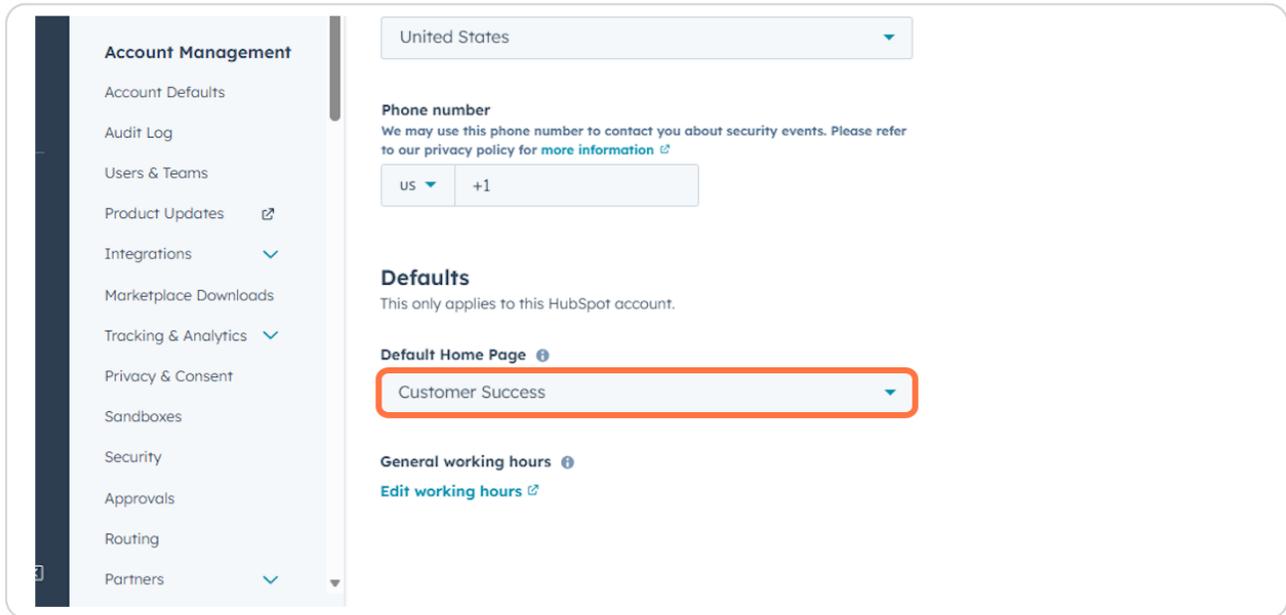
STEP 20

Your General settings will contain many of the relevant, day-to-day settings you may want to configure.



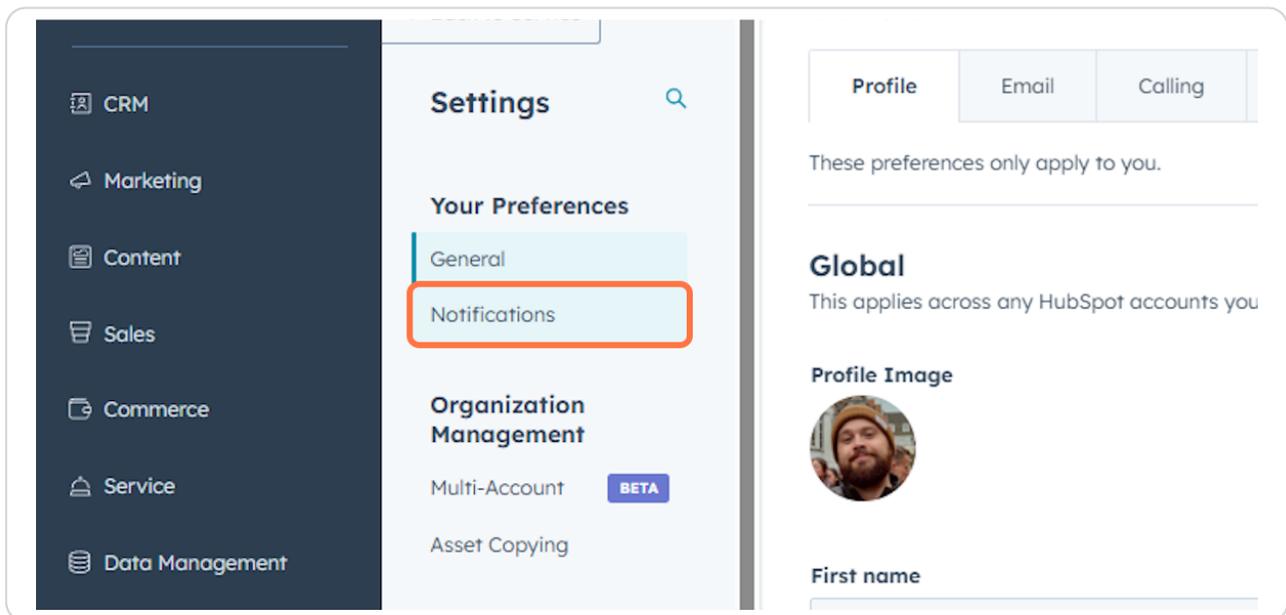
STEP 21

From the General settings, you can set and modify your default homepage. This should be either Dashboards or Customer Success.



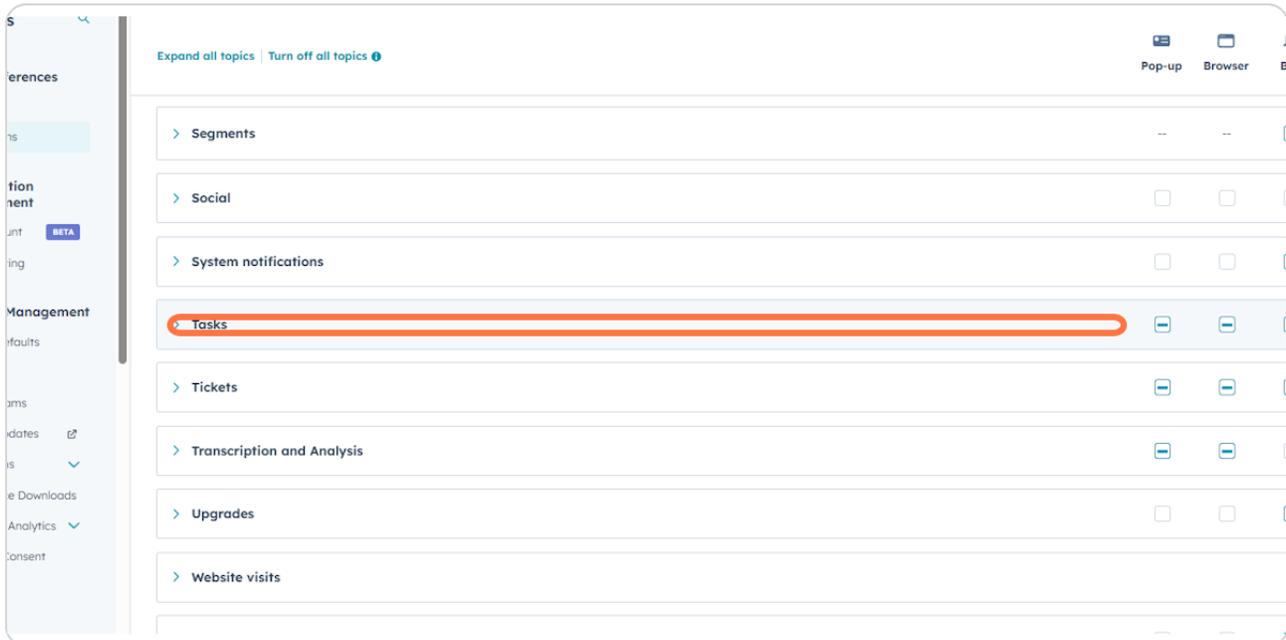
STEP 22

You can customize your notifications in Notification settings, under Your Preferences.



STEP 23

You can select the category of notifications you'd like to modify and use the check icons to indicate what types of notifications you wish to receive.



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