

Using Record Previews In HubSpot

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

Created by

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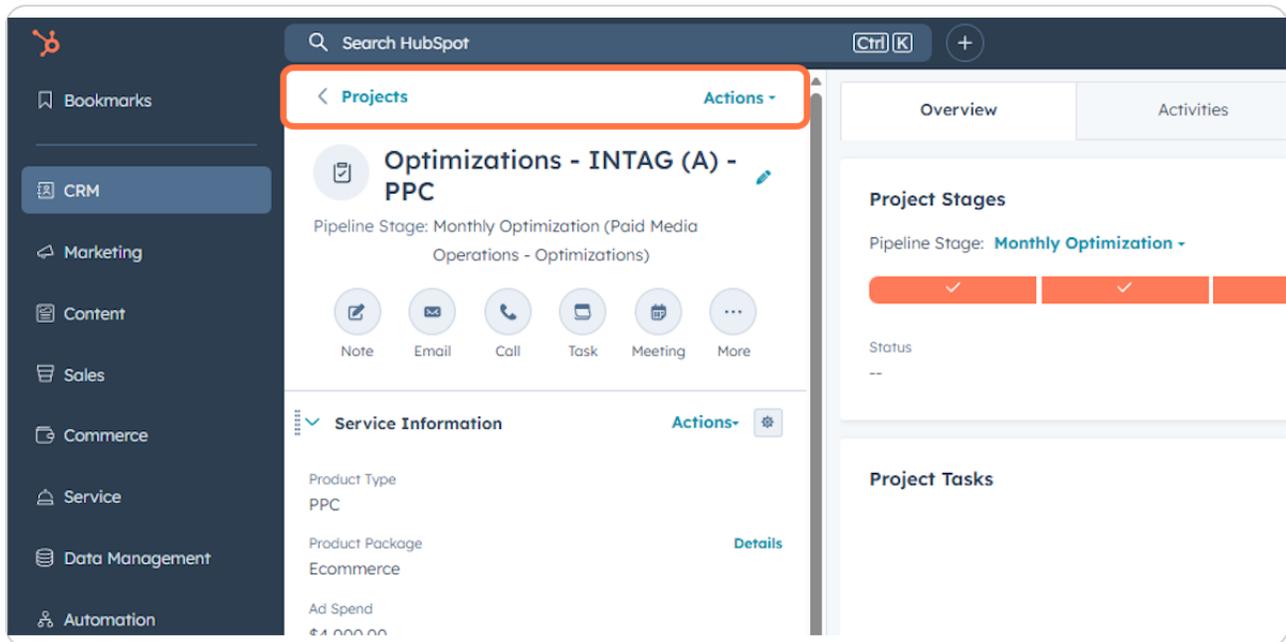
LP Team

Jan 07, 2026

Jan 13, 2026

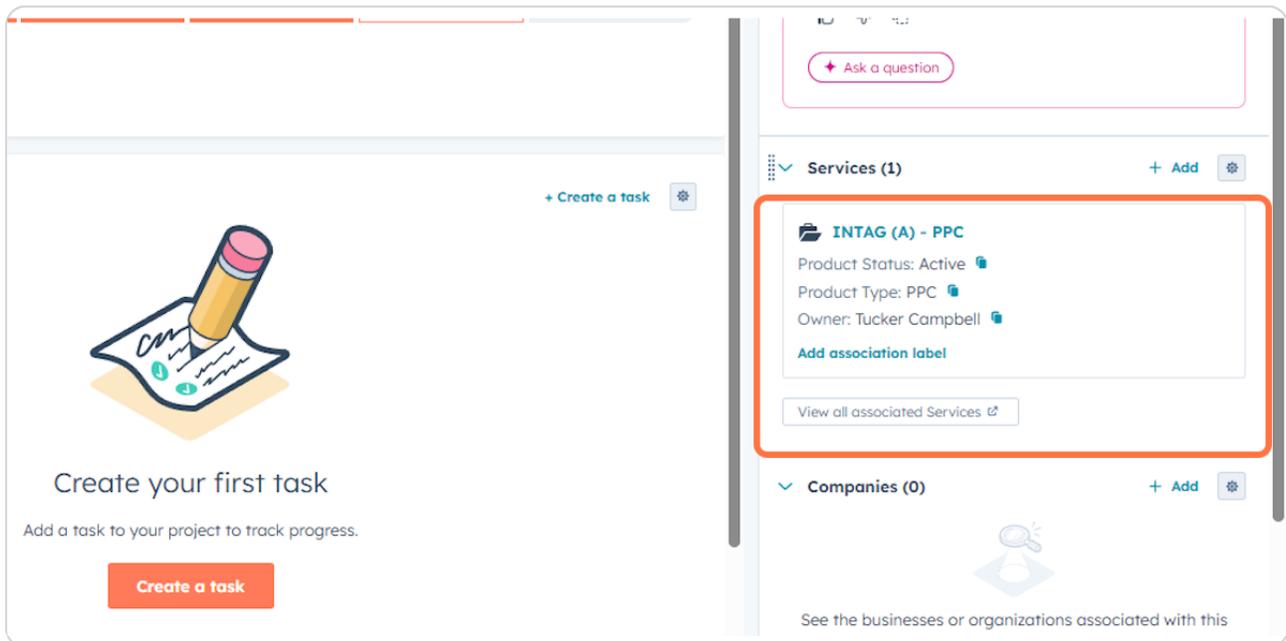
STEP 1

Access the Optimization Project record you wish to view the Interactions for.



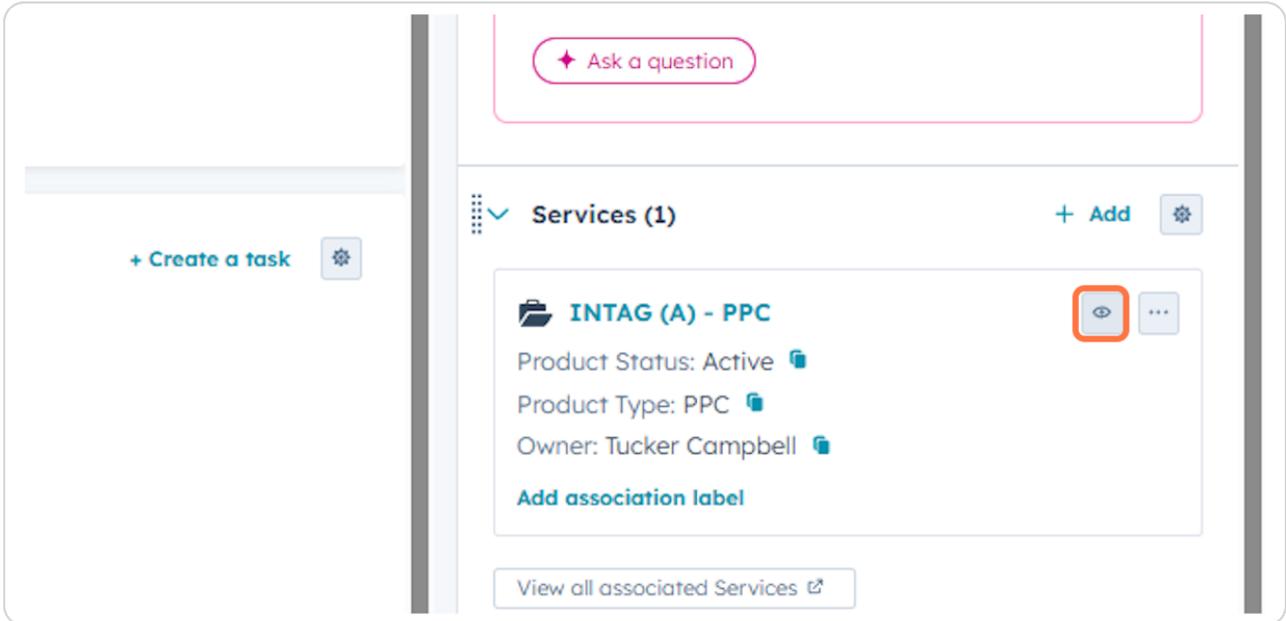
STEP 2

Locate the Service Association card in the Right Column



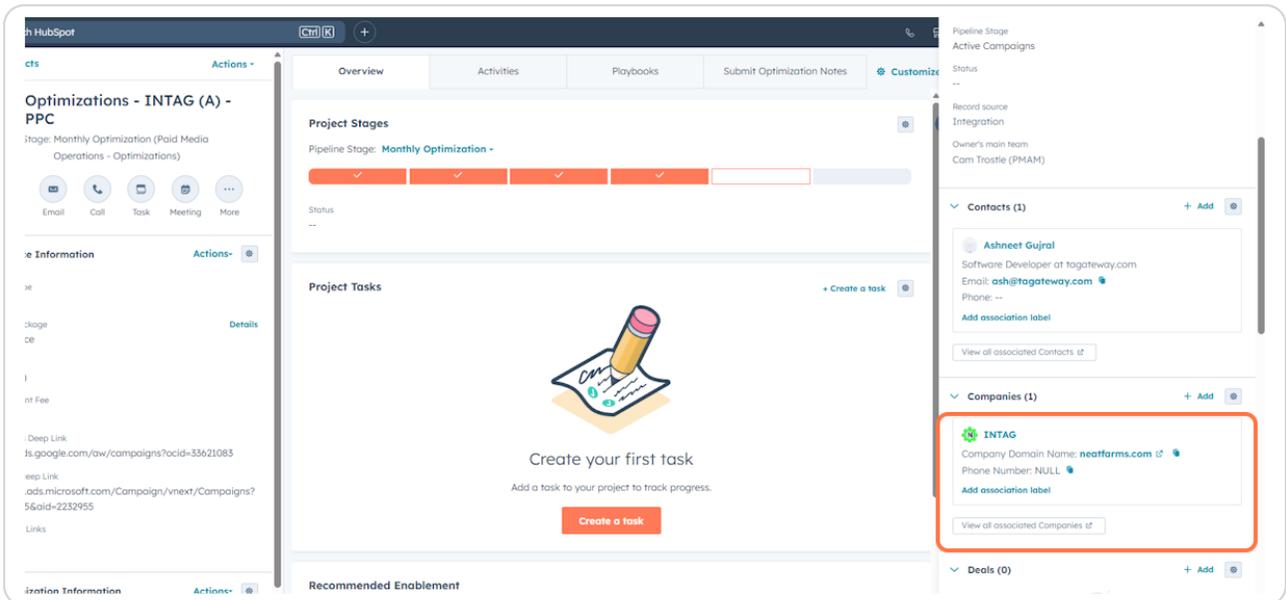
STEP 3

Select the "Eye" Icon (Preview) on the Service card. This will open a new "Service Preview" pane from the right side of the page.



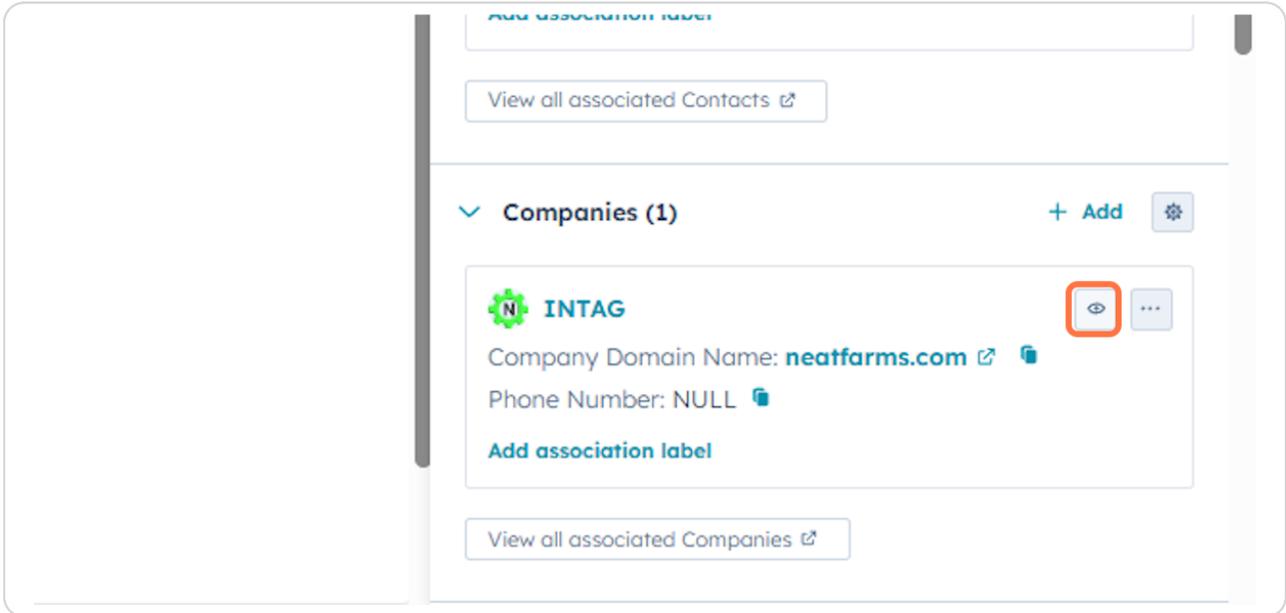
STEP 4

Scroll down on the Service Preview pane and find the Associated Company record.



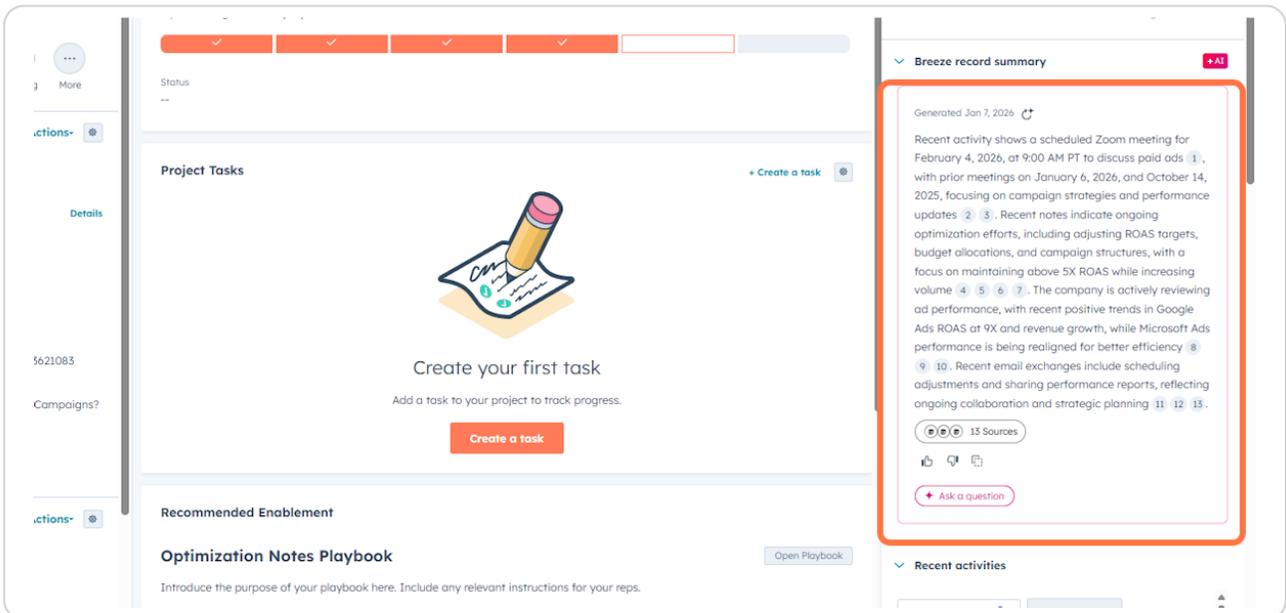
STEP 5

Select the "Eye" Icon (Preview) on the Company card. This will open a new "Company Preview" in the same pane on right side of the page.



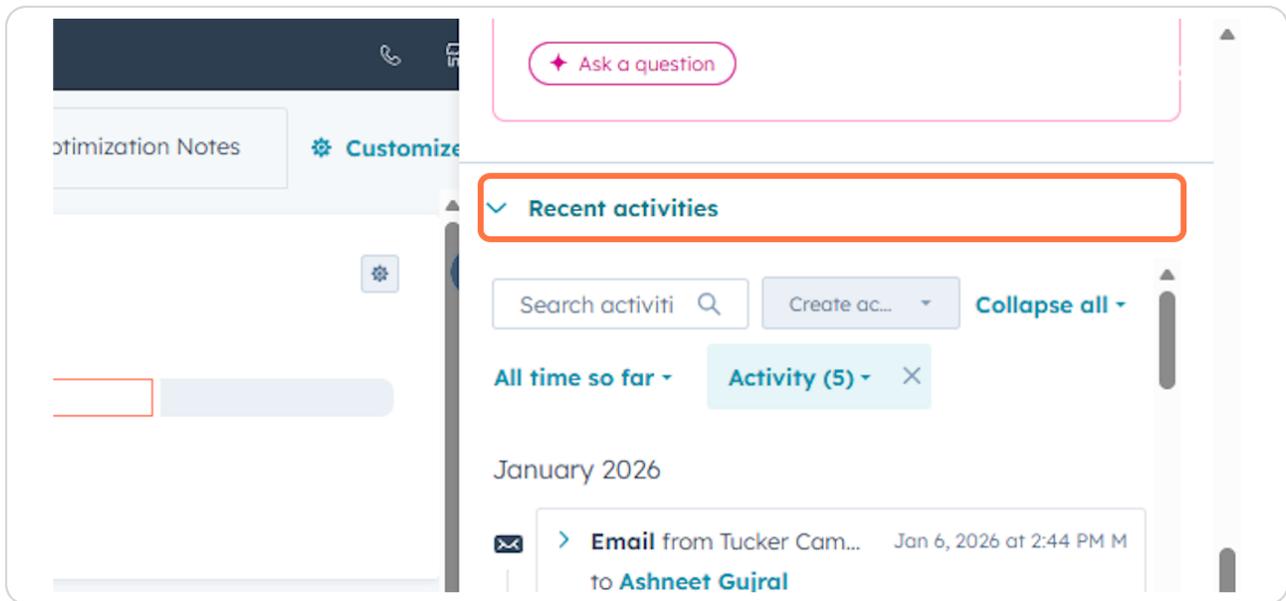
STEP 6

An AI Summary of the Company Activities will generate at the top of the preview pane.



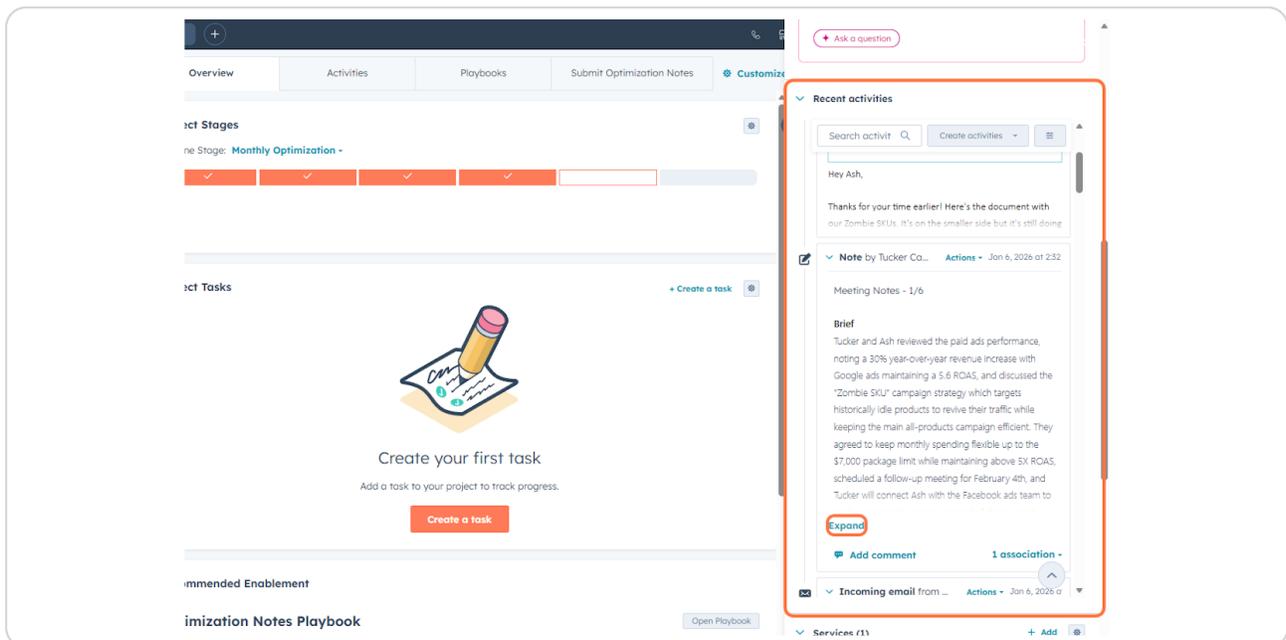
STEP 7

Just below the AI Summary, you will find a "Recent Activities" collapsible card



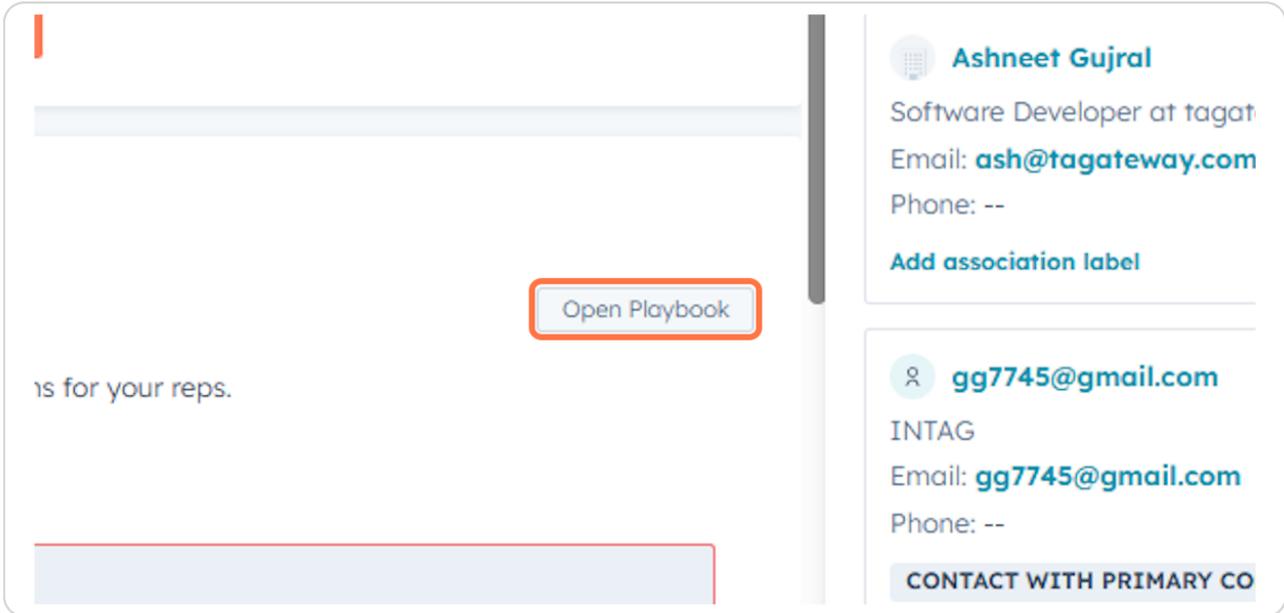
STEP 8

In the Recent Activities card, you can scroll through Call, Email, Meeting, and Note activities that AM has created to track Client Interactions. Activities with a lot of text can be Expanded.



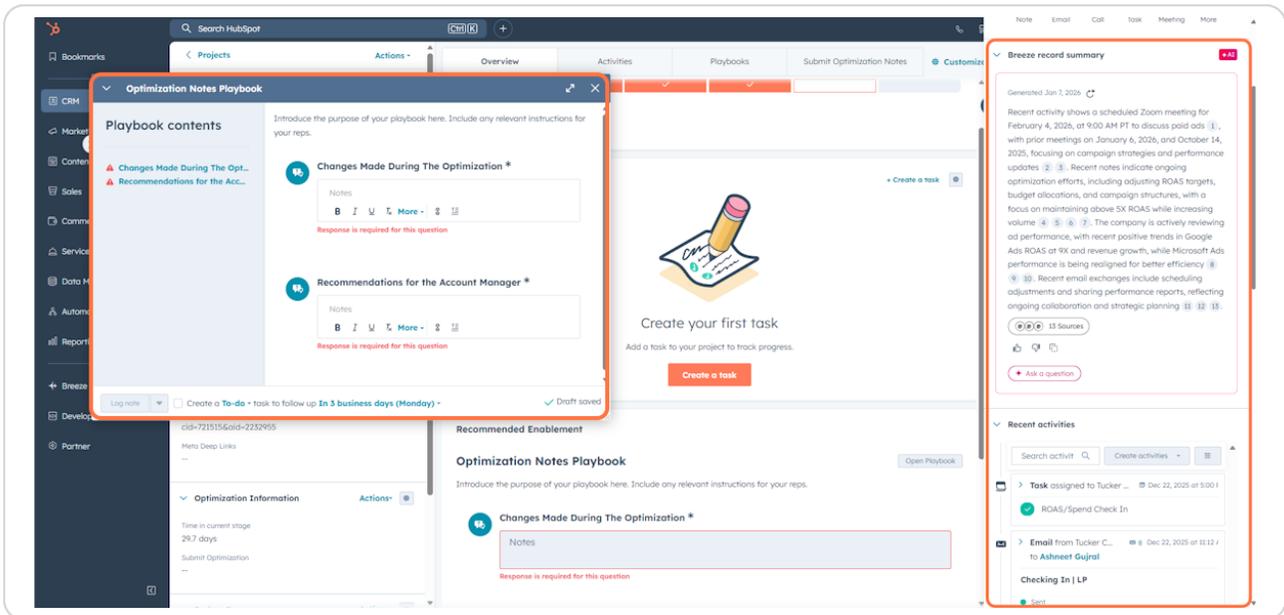
STEP 9

If you are viewing the Interactions as part of performing an Optimization, you can open your Op Playbook without leaving the preview pane.



STEP 10

This way you can have your Op Notes and Client Interactions available to you all on one screen.



Tango

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