

Sola Salon Studios - Auto-Magic Lead Sourcing

This guide walks through the Auto-Magic Lead Sourcing in HubSpot. The Auto-Magic Lead Sourcing helps to effortlessly track lead sources and attributions to gain valuable insights into lead generation ROI. Said simply, Auto-Magic Lead Sourcing shows where a lead came from.

14 Steps [View most recent version](#) 

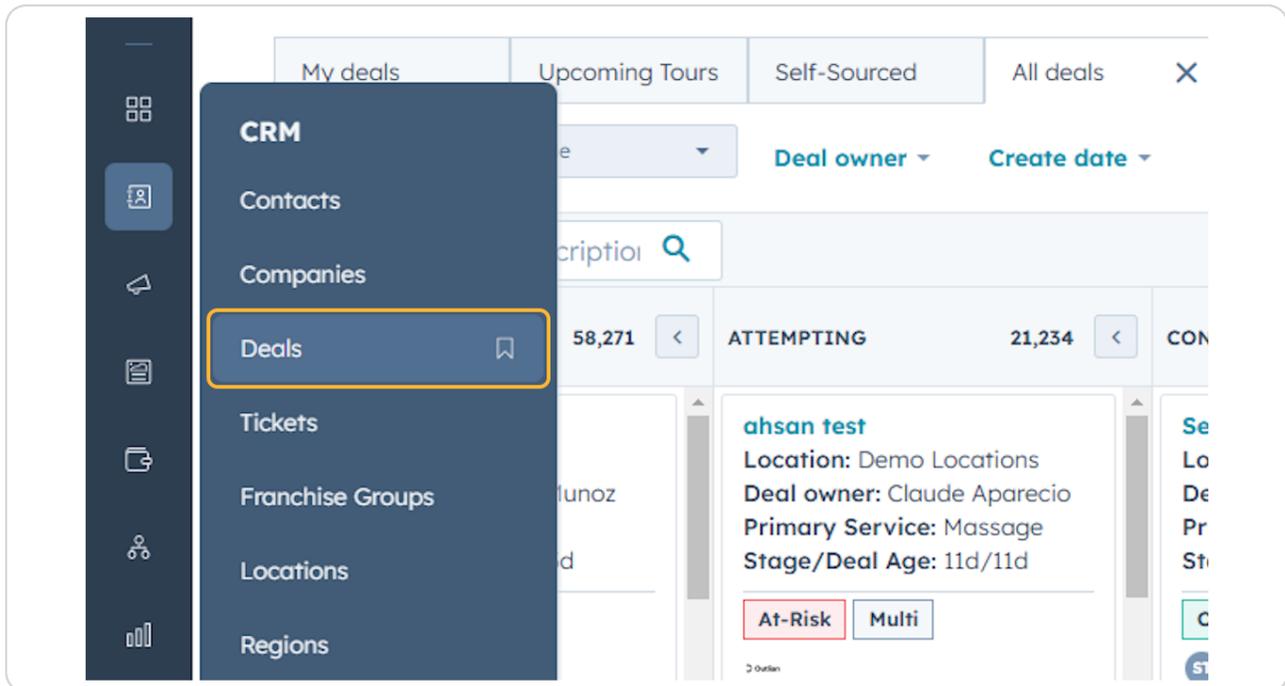
Created by	Creation Date	Last Updated
Doug Davidoff	Nov 12, 2024	Feb 06, 2025

Jump into HubSpot and Access Deals

14 Steps

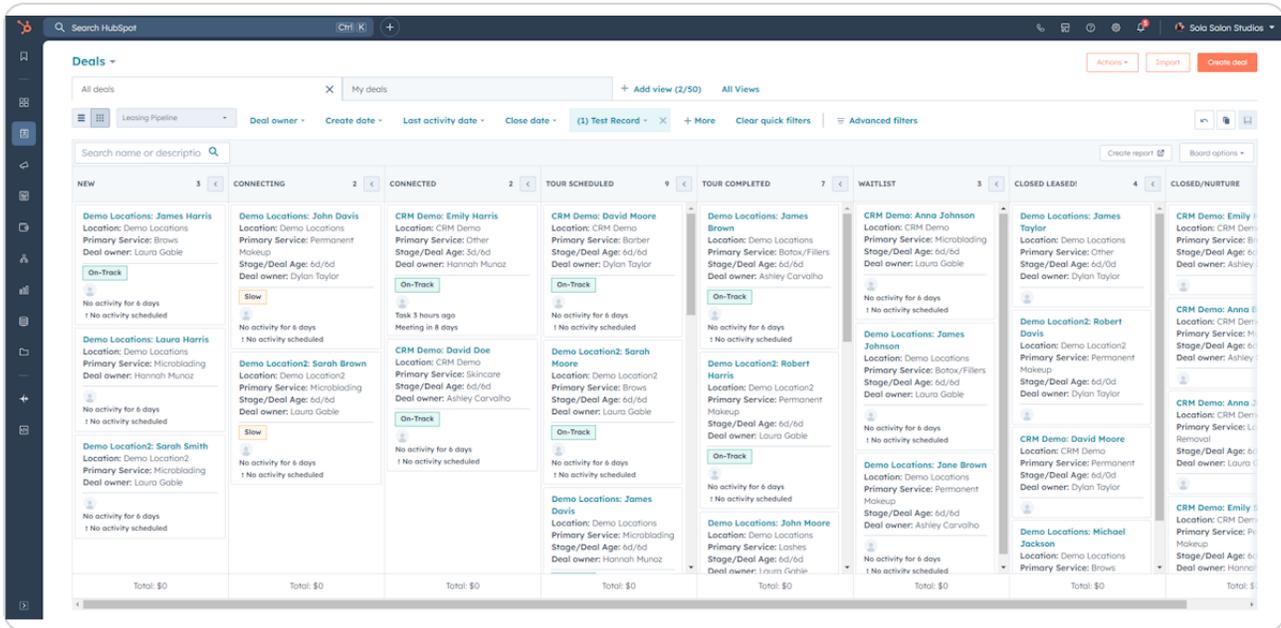
STEP 1

If you are not in Deals, go to the left-hand side navigation to the CRM section and Click Deals



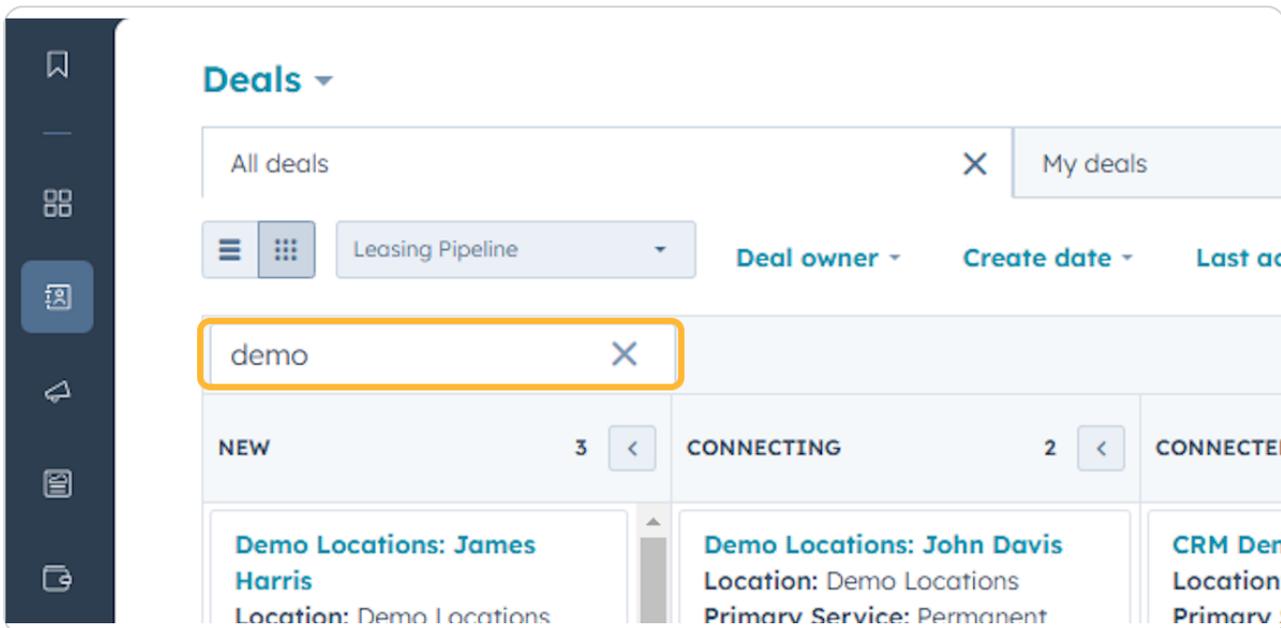
STEP 2

You'll be brought to the Deals overview page



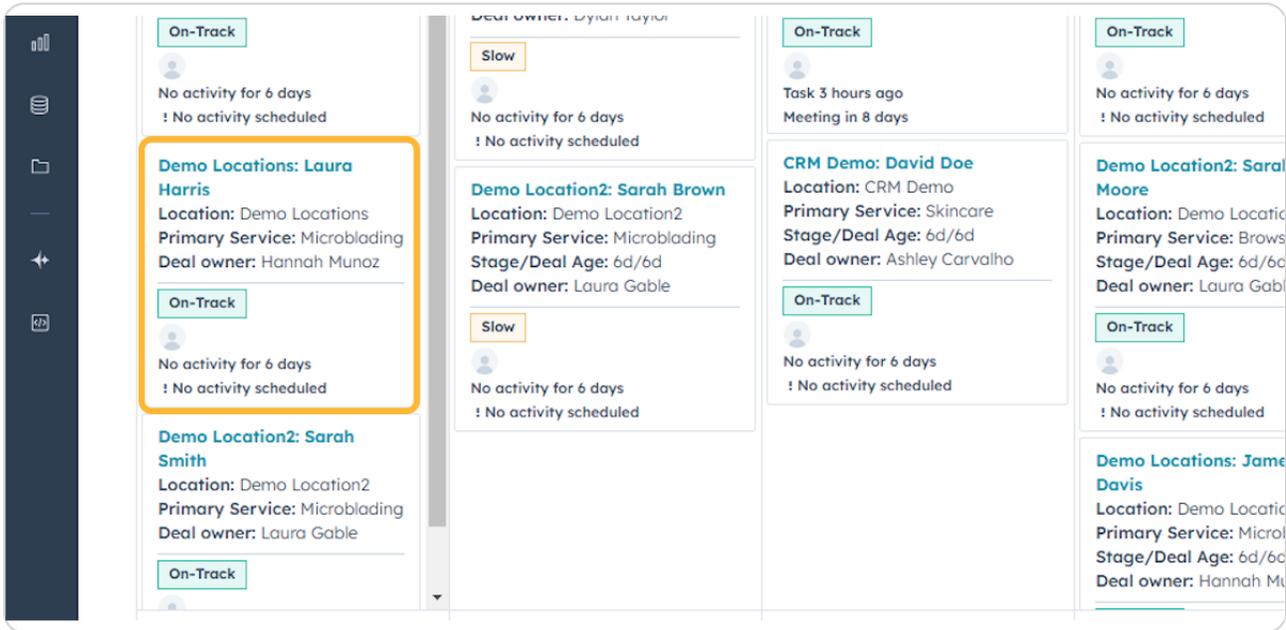
STEP 3

If you don't want to hunt for the Deal you're looking for, you can search for it



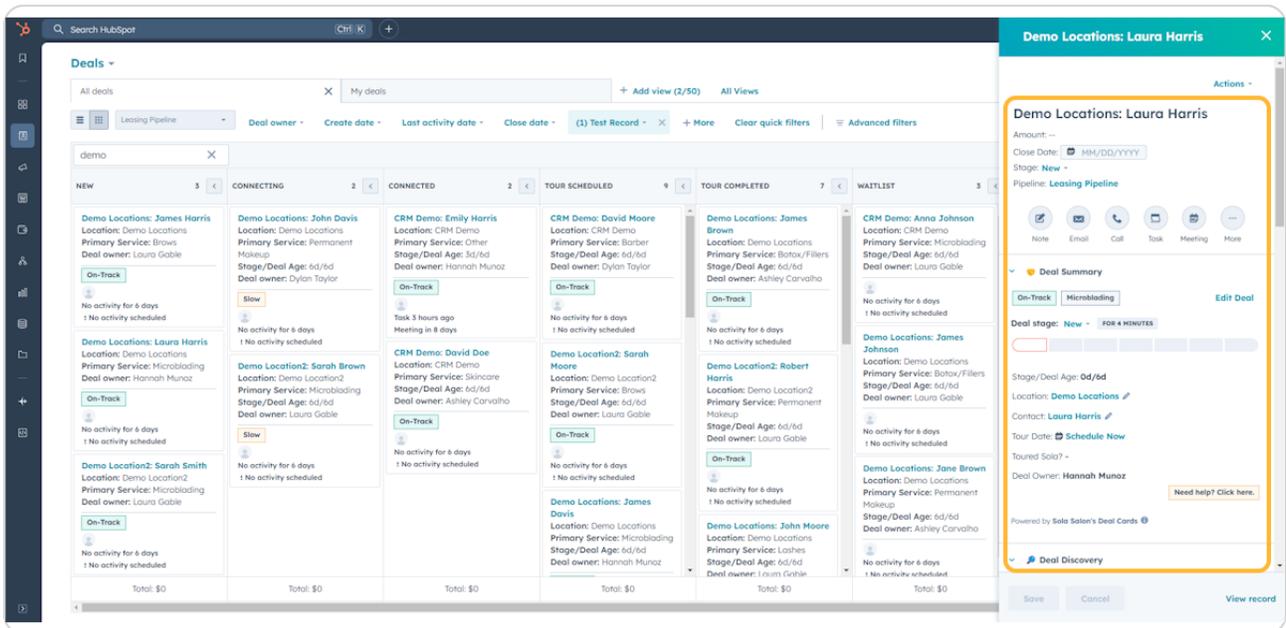
STEP 4

Click on the card of the Deal you want to preview



STEP 5

A preview will populate on the right-hand side



STEP 6

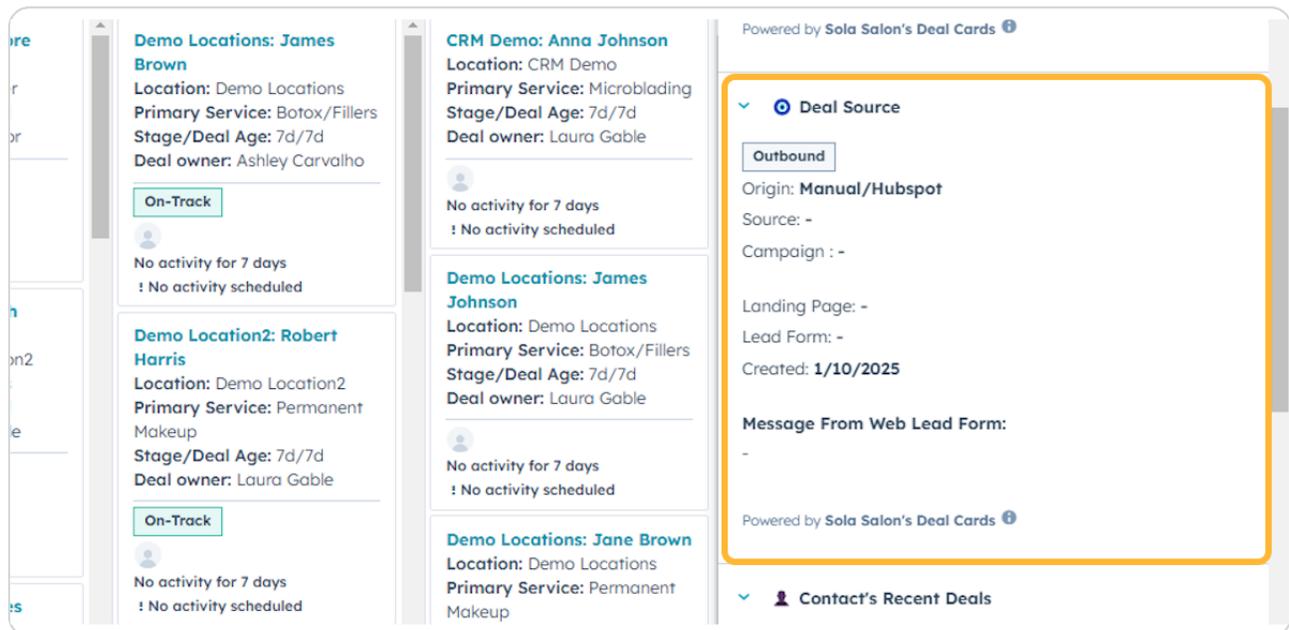
Scroll until you get to the Deal Source section

This Deal Source is showing Outbound. This will appear for those who have self-sourced their own deals from an expo (for example).

Self-Sourced Deals will have an Origin of Manual/Hubspot.

Below Origin, you'll be able to see the Source. A few examples of what you could see include: Direct Traffic, Paid Social / Meta - Facebook Ads.

This will give you insight into where the lead came from. This information can help guide conversations with Pros as you're getting to know them.



The screenshot displays a CRM interface with several deal cards and a detailed view of a deal source. The deal cards on the left provide summary information for various leads, including their names, locations, primary services, and deal owners. Each card also indicates the deal's status (e.g., 'On-Track') and notes that there has been no activity for 7 days with no activity scheduled.

The detailed view on the right, titled 'Deal Source', shows the following information:

- Deal Source: Outbound
- Origin: Manual/Hubspot
- Source: -
- Campaign: -
- Landing Page: -
- Lead Form: -
- Created: 1/10/2025
- Message From Web Lead Form: -

The interface is powered by Sola Salon's Deal Cards and includes a section for 'Contact's Recent Deals' at the bottom.

STEP 7

This Deal Source is showing Inbound | Organic

Inbound | Organic means the Deal came to Sola. We can see that the Origin is the Sola Website and the Source is Direct Traffic. We can also see the specific Landing Page the Deal came from and what Form they filled out.

Note: Select information has been blurred for confidentiality reasons.

The screenshot displays a CRM interface with three deal cards on the left and a detailed view on the right. The deal cards are for 'CRM Demo: Anna Johnson', 'Demo Locations: James Johnson', and 'Demo Locations: Jane Brown'. Each card shows 'No activity for 7 days' and 'No activity scheduled'. The detailed view on the right is titled 'Deal Source' and shows 'Inbound' and 'Organic' as selected categories. It lists 'Origin: Sola Website', 'Source: Direct Traffic', 'Campaign: -', 'Landing Page: /home', 'Lead Form: going-independent', and 'Created: 1/17/2025'. A message from a web lead form is also visible, stating 'This is a test to submit lead capture form in Going Independent page'. The interface is powered by Sola Salon's Deal Cards.

CRM Demo: Anna Johnson
Location: CRM Demo
Primary Service: Microblading
Stage/Deal Age: 7d/7d
Deal owner: Laura Gable
No activity for 7 days
! No activity scheduled

Demo Locations: James Johnson
Location: Demo Locations
Primary Service: Botox/Fillers
Stage/Deal Age: 7d/7d
Deal owner: Laura Gable
No activity for 7 days
! No activity scheduled

Demo Locations: Jane Brown
Location: Demo Locations
Primary Service: Permanent Makeup
Stage/Deal Age: 7d/7d
Deal owner: Laura Gable
Note 2 months ago
! No activity scheduled

Deal Source
Inbound Organic
Origin: Sola Website
Source: Direct Traffic
Campaign: -
Landing Page: /home
Lead Form: going-independent
Created: 1/17/2025
Message From Web Lead Form:
This is a test to submit lead capture form in Going Independent page
Powered by Sola Salon's Deal Cards

STEP 8

To see more detail on the Source, Click on View record in the bottom right-hand corner of the Preview

Powered by Sola Salon's Deal Cards ⓘ

▼  Contact's Recent Deals

No recent deals for contact

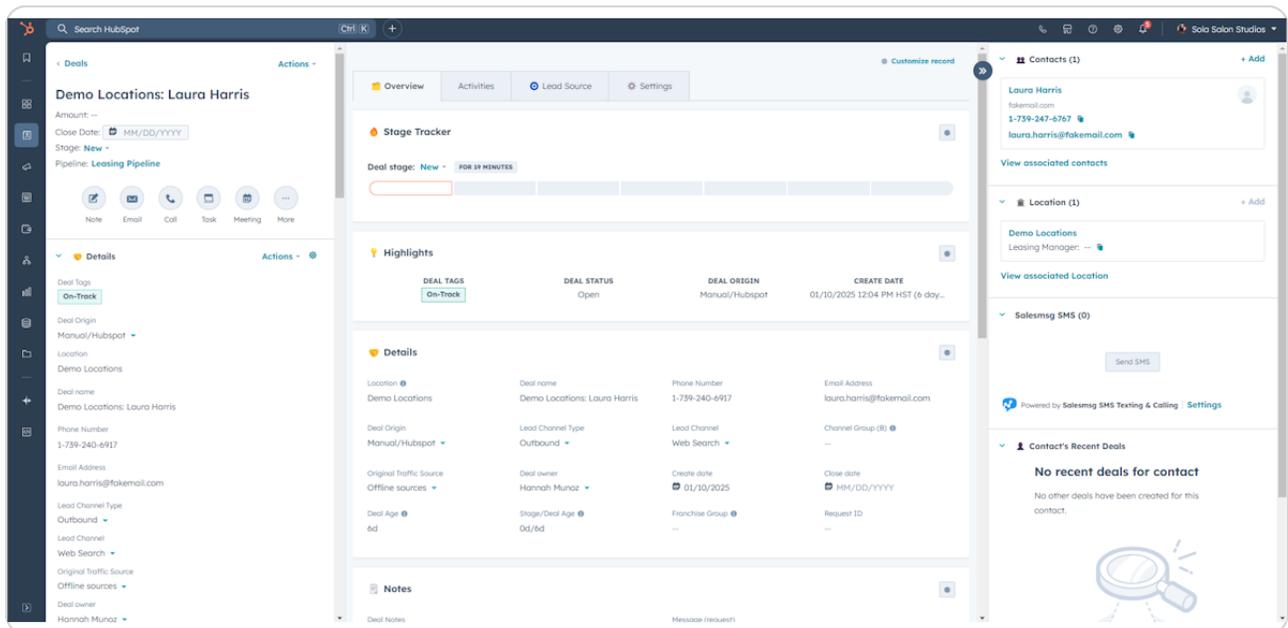
No other deals have been created for this contact.

Total: \$0

Save Cancel **View record**

STEP 9

This will take you to the Deal Record



The screenshot shows the HubSpot Deal Record interface for 'Demo Locations: Laura Harris'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options like 'Deals', 'Details', and 'Actions'. The 'Details' section is expanded, showing fields such as Deal Tags (On-Track), Deal Origin (Manual/Hubspot), Location (Demo Locations), Deal name (Demo Locations: Laura Harris), Phone Number (1-739-240-6917), Email Address (laura.harris@fakemail.com), Lead Channel Type (Outbound), Lead Channel (Web Search), Original Traffic Source (Offline sources), and Deal owner (Hannah Munoz).
- Main Content Area:**
 - Overview:** Shows 'Stage Tracker' with 'Deal stage: New' and a progress bar.
 - Highlights:** A table with columns: DEAL TAGS (On-Track), DEAL STATUS (Open), DEAL ORIGIN (Manual/Hubspot), and CREATE DATE (01/10/2025 12:04 PM HST (6 day...)).
 - Details:** A table with columns: Location (Demo Locations), Deal name (Demo Locations: Laura Harris), Phone Number (1-739-240-6917), Email Address (laura.harris@fakemail.com), Deal Origin (Manual/Hubspot), Lead Channel Type (Outbound), Lead Channel (Web Search), Channel Group (B), Original Traffic Source (Offline sources), Deal owner (Hannah Munoz), Create date (01/10/2025), Close date (MM/DD/YYYY), Deal Age (6d), Stage/Deal Age (0d/6d), Franchise Group, and Request ID.
 - Notes:** A section for 'Deal Notes' with a 'Message Request' button.
- Right Sidebar:**
 - Contacts (1):** Shows 'Laura Harris' with email 'fakemail.com', phone '1-739-247-6767', and email 'laura.harris@fakemail.com'.
 - View associated contacts:** A section for viewing associated contacts.
 - Location (1):** Shows 'Demo Locations' with 'Leasing Manager: --'.
 - View associated Location:** A section for viewing associated locations.
 - Salesmsg SMS (0):** A section for sending SMS with a 'Send SMS' button.
 - Contact's Recent Deals:** Shows 'No recent deals for contact' with a magnifying glass icon.

STEP 10

Scroll on the left-hand side until you get to the section Lead Source Attribution

This information is important for when it comes to reporting. Having this information will help to automatically track where leads are coming from. This will also help assist with attribution and measure marketing effectiveness.

The screenshot displays the HubSpot CRM interface for a deal named "CRM Demo: Emily Harris". The left-hand navigation menu is expanded to show the "Lead Source" section, which is highlighted with a yellow box. This section includes fields for Deal Origin, Lead Channel Type, Channel Group, Channel Name, Lead Channel Detail, Lead Channel, Channel Strategy, Channel Category, Channel Group (B), Original Traffic Source, and Offline sources. The main content area shows the "Lead Source" tab selected, displaying a "Stage Tracker" with a progress bar, a "Highlights" table, and a "Details" table. The "Details" table provides information about the deal, including location, deal name, phone number, email address, deal origin, lead channel type, lead channel, channel group (B), original traffic source, deal owner, create date, close date, deal age, stage/deal age, franchise group, and request ID. The right-hand sidebar shows contact information for Emily Harris, associated location (CRM Demo), salesmsg SMS (0), and a note that there are no recent deals for this contact.

DEAL TAGS	DEAL STATUS	DEAL ORIGIN	CREATE DATE
On-Track	Open	Manual/Hubspot	01/10/2025 12:04 PM HST (7 day...

Location	Deal name	Phone Number	Email Address
CRM Demo	CRM Demo: Emily Harris	1729-222-1234	emily.harris@dummyemail.co m

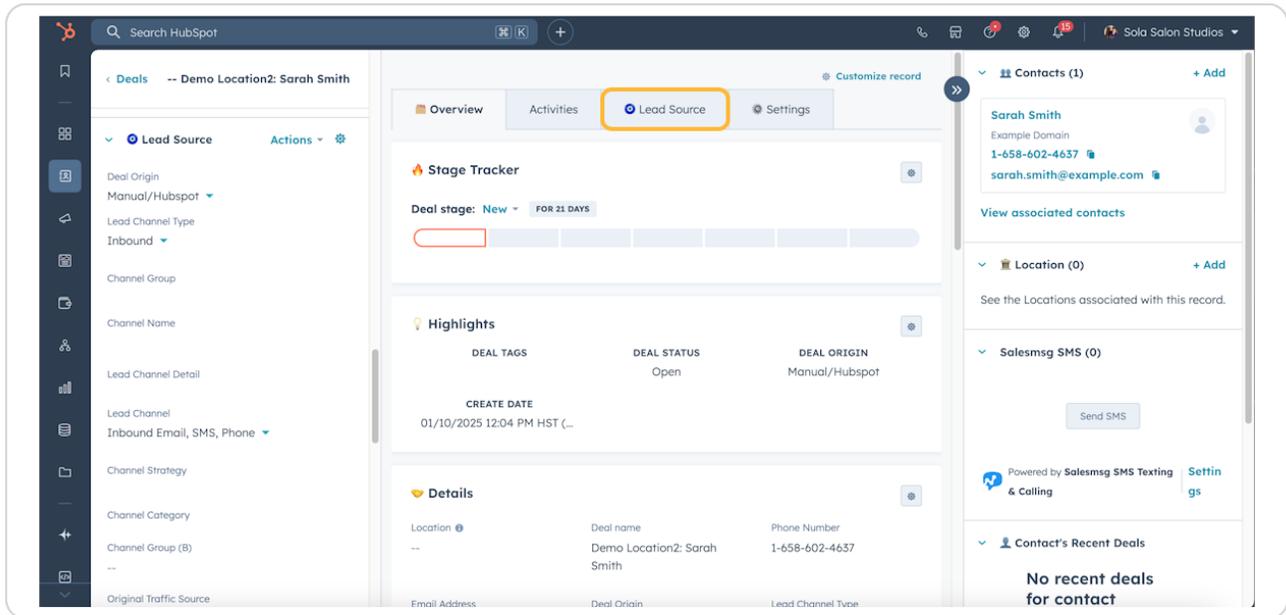
Deal Origin	Lead Channel Type	Lead Channel	Channel Group (B)
Manual/Hubspot	Inbound	Inbound Email, SMS, Phone	--

Original Traffic Source	Deal owner	Create date	Close date
Offline sources	Hannah Munoz	01/10/2025	MM/DD/YYYY

Deal Age	Stage/Deal Age	Franchise Group	Request ID
7d	4d/7d	--	--

STEP 11

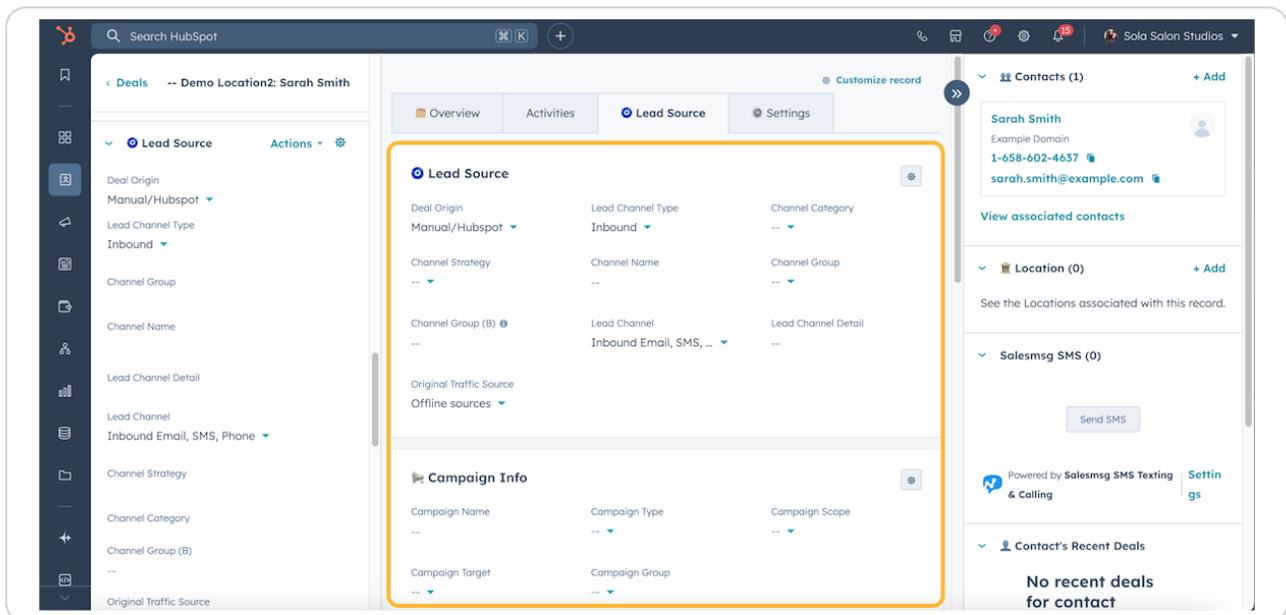
To see more details on the Lead Source, Click on the Lead Source tab in the center panel of the record



The screenshot shows the HubSpot CRM interface for a record titled "Demo Location2: Sarah Smith". The "Lead Source" tab is selected and highlighted with a yellow box in the center panel. The left sidebar shows a list of fields including Deal Origin, Lead Channel Type, Channel Group, Channel Name, Lead Channel Detail, Lead Channel, Channel Strategy, Channel Category, Channel Group (B), and Original Traffic Source. The center panel displays the "Stage Tracker" with a "Deal stage: New" and a "FOR 21 DAYS" indicator. Below this is a "Highlights" section with a table showing DEAL TAGS, DEAL STATUS (Open), and DEAL ORIGIN (Manual/Hubspot). The "CREATE DATE" is 01/10/2025 12:04 PM HST. The "Details" section shows fields for Location, Deal name (Demo Location2: Sarah Smith), Phone Number (1-658-602-4637), Email Address, Deal Origin, and Lead Channel Type. The right sidebar shows contact information for Sarah Smith, including her phone number and email address, and a "Send SMS" button. Below this is a "Salesmsg SMS (0)" section with a "Send SMS" button and a "Powered by Salesmsg SMS Texting & Calling" logo. At the bottom, it says "No recent deals for contact".

STEP 12

You'll see the general overview of the Lead Source followed by any Campaign Information that's attached to the Lead Source



The screenshot shows the HubSpot CRM interface for the same record. The "Lead Source" tab is selected and highlighted with a yellow box in the center panel. The left sidebar is the same as in Step 11. The center panel displays the "Lead Source" section with fields for Deal Origin (Manual/Hubspot), Lead Channel Type (Inbound), Channel Category, Channel Strategy, Channel Name, Channel Group, Channel Group (B), Lead Channel (Inbound Email, SMS, ...), and Original Traffic Source (Offline sources). Below this is the "Campaign Info" section with fields for Campaign Name, Campaign Type, Campaign Scope, Campaign Target, and Campaign Group. The right sidebar is the same as in Step 11.

STEP 13

Scroll down to see Information into the Lead Form Data

The screenshot shows the HubSpot interface for a contact record. The left sidebar contains navigation options like Deal Origin, Lead Channel Type, and Channel Group. The main content area is divided into sections: Campaign Target, Campaign Group, Lead Form Data (message), Lead Form Data (info), and Lead Source Traffic. The 'Lead Form Data (info)' section is highlighted with an orange box and contains the following data:

Full Name (request)	Email (request)	Phone (request)
Demo Location2: Sarah Smith	sarah.smith@example.com	1-658-602-4637
Location Name (request)	Services (request)	Looking to Move (request)
--	Microblading	--
Web Request Type	Location ID (request)	Contact Opt-In (SMS)
--	--	--

The right sidebar shows contact details for Sarah Smith, including her phone number and email address. Below this, there are sections for 'View associated contacts', 'Location (0)', 'Salesmsg SMS (0)', and 'Contact's Recent Deals'.

STEP 14

Scroll even further to see details on the Lead source Traffic and Lead Source UTMs

The screenshot shows the HubSpot interface for a contact record, scrolled down to show 'Lead Source Traffic' and 'Lead Source UTMs'. Both sections are highlighted with an orange box. The 'Lead Source Traffic' section contains the following data:

Deal Origin	Request Form Type	Request Form Name
Manual/Hubspot	--	--
Request Form Page	Landing Page	Referring Domain
--	--	--
Landing Page URL	Request Form URL	Referring URL
--	--	--
Original Traffic Source	Original Traffic Source Dril...	Original Traffic Source Dril...
Offline sources	IMPORT	Sola Contact Dumm...
Web Request Type	IP Address (request)	Session ID
--	--	--
Request ID	--	--

The 'Lead Source UTMs' section contains the following data:

UTM Source (request)	UTM Medium (request)	UTM Campaign (request)
--	--	--
UTM Content (request)	UTM Term (request)	--

The right sidebar remains the same as in Step 13, showing contact details and associated sections.

