# Sola Salon Studios - A Day in the Life of Utilizing HubSpot's Mobile App

HubSpot's mobile app is great for when you are on the go and aren't going to be around your computer. This guide walks through a day in the lift of using the mobile app. You'll see how you can navigate to Deals, add and update your Deals, and how to access other pipelines and dashboards.

74 Steps <u>View most recent version</u>

Created by

Doug Davidoff

Creation Date Jan 14, 2025 Last Updated Feb 19, 2025



# # Open up the HubSpot Mobile App and Navigate to... 7 Steps

Note: Make sure you have downloaded the HubSpot app to your phone.

#### STEP 1

#### Welcome to the Home Screen! Let's navigate to Deals

Note: On the Home Screen, you can click the Deals button. Everywhere else in the app you will want to use the hamburger menu at the top left-hand corner of the screen.

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SENT OPENL + Create



# You'll be taken to the Deal Overview

Deal Names have been blurred for confidentiality reasons.





It can be challenging to find your specific Deals. Let's filter by your Deals. Click Add Views





# Check My deals

11:49		al 🗟 (	Ď
Cancel	Add views		Done
Q Search			
Preset Views (7)			
Open de	eals		
Stalled	deals		
Recent	activity		
No acti	vity scheduled		
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<ul> <li>All deal</li> </ul>	S		
Deals I	m collaborating on	ı	
My dea	ls		
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#### STEP 5

## **Click Done**

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Deals I	I'm collaborating on	ı	
My dec	als		
	2 of 5 selected		
		_	



Now you'll see only Deals owned by you. This will make locating a specific deal easier





Note: On the kanban view, you can see Deals in other stages of the pipeline by swiping on the screen.



# # Adding Deals

8 Steps



If you are on the go and need to add a new Deal to HubSpot, Click +Deal





A form will pop up. Include all information that you have available about the Deal. Any fields listed as Required need to be filled out to create a Deal.

14:03		ul 🗢 🗖	)
Cancel	Create Deal	Sc	ave
Deal Name Hannah Mun	noz Demo Test		
Pipeline Leasing Pipe	eline		•
Deal Stage New			•
Email Address hannah@lift	tengblement.com		
Phone Number 123-123-1234	4		
Location Name Annapolis			•
Primary Service Hair			•
Other Services Brows, Lashe	es		•
Lead Type Outbound			•
Lead Channel Linkedin			•
Lead Channe	el Detail		
No of Chairs 1			•
Current Situation	n Builterer 0	undland Bank	•



# To associate a location with the deal, make sure you Click on the Location dropdown and choose the proper Location Name.

Note: There may be locations with the same name. If that is the case, there will be parentheses with the state mentioned so you pick the correct Location.

14:03		ııI ≎ ■
Cancel	Create Deal	Sav
Deal Name Hannah Mun	noz Demo Test	
Pipeline Leasing Pipe	eline	
Deal Stage New		•
Email Address hannah@lifte	tenablement.com	
Phone Number 123-123-1234	4	
Location Name Annapolis		•
Primary Service Hair		•
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Lead Type Outbound		•
Lead Channel Linkedin		•
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When you are choosing a Lead Type and Lead Channel, the options will not sort like they do on the desktop. If you choose Lead Type as Inbound, the first 3 options in Lead Channel are the Inbound options you can choose from. The rest are Outbound options.

14:02		ul 🗢 🗖
Cancel	Lead Channel	
Q Search		
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Inbound Othe	er	
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Social Media		
Web Search		
Linkedin		



Scroll down and include all information. When you are done Click Save

14:03		ul 🗟 🔲	),
Cancel	Create Deal	Sc	ave
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Phone Number 123-123-1234			
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Deal owner Hannah Munoz	σz		•
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### A new Deal will be Created

Note: It may take a second for the Deal to register within HubSpot. Refreshing the screen will help the new Deal appear on your screen.

C Deals Pipeline All deals My deals Add Views (2/5)	<ul> <li>✓ Deals Pipeline</li> <li>All deals My deals Add Views (2/5)</li> <li><sup>13</sup> results Sorted by Create date ↓</li> <li>Wew 4 deals   50 toral</li> <li>Hannah Munoz Demo Test Jan 13, 2025 or 11:53</li> <li>(19) CRM Demo: Emily Harris Sow Jan 10, 2025 or 12:04</li> <li>(19) Demo Locations: Michael Brown Sow Jan 10, 2025 or 12:04</li> </ul>	 	C Deals F     All deals My deals Add Views (2/5)     Serverits     Sorred by Create date     Annah Munoz Demo Test     Jan 13, 2025 at 11:53     Top CRM Demo: Emily Harris     Sorre     Jan 10, 2025 at 12:04     Top Demo Locations:     Jan 10, 2025 at 12:04     Top Demo Locations: Laura Smith     Sorre     Jan 10, 2025 at 12:04     Top Demo Locations: Laura Smith     Sorre     Jan 10, 2025 at 12:04     Top Demo Locations: Laura Smith     Sorre     Jan 10, 2025 at 12:04     Top Demo Locations: Laura Smith     Sorre     Jan 10, 2025 at 12:04	C Deals A deals My deals Add Views (2/5)
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## **Click the New Deal**

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#### STEP 15

# You can now update the Deal and work from within the Deal

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Score is being calculated Please refresh the page or try again later.
Home Contacts Tasks Dashboards Search



# **#** Updating Deals

As you're working on Deals it's important to make sure the information about a deal, including pipeline stage, is up to date. Let's walk through how to keep your Deals fresh on the go including logging notes, creating tasks, and even scheduling tours.

#### STEP 16

#### Click on the Deal you want to work on

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	Jan 10, 2025 at 12:04	Jan 10, 2025 ar 12:04



If someone calls you while you are out and about and you need to log that call, Click on the Log Activity button

11:55 📶 🗢 🗩	
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Call Log Activity Add Note More	
Stage: New 🗸	
Overview Activity Associations About Quotes Li	
Next activity	
Create next activity (+)	
Recent activity	
Task CRM Demo: Emily Harris: Reminder to either contact lead or m January 11, 2025 at 12:04	
Task CRM Demo: Emily Harris: 1st attempt to connect January 11, 2025 at 05:00	
Deal score Learn more	
Since Jan 10, 2025	
Home Contacts Tasks Dashboards Search	



# Click Call

Cancel       Log Activity         Q. Search	11:56		''II & 🗩
Q. Search         Call         Email         Meeting         SMS         WhatsApp         LinkedIn message         Postal mail	Cancel	Log Activity	
Call         Email         Meeting         SMS         WhatsApp         LinkedIn message         Postal mail	Q Search		
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WhatsApp         LinkedIn message         Postal mail	SMS		
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# Update the Call Log

Include:

- $\cdot$  What the call was about
- Call Type
- Call Outcome
- Date/Time
- (Optional) Include a Follow up task



### Click Save



#### STEP 21

# You'll be notified that a Call was logged and a Follow-up task was created

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	Deal		
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	Stage: New '	~	
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This Deal now needs to be moved out of the New Stage. At the top of the record, Click the Stage drop down

11:57 ul 🕈 🗩
CRM Demo: Emily Harris
Coll Log Activity Add Note More
Overview Activity Associations About Quotes Li
Next activity
Create next activity (+)
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Task CRN Demo: Emily Harris: Reminder to either contact lead or m January 11, 2025 at 12:04
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Deal score Learn more
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# Select the updated stage

11:57		ul 🗢 🗩
Cancel	Move Deal	
Q Search		
New		~
Connecting		
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The Deal will automatically move into the updated stage

11:57 <b>! ? </b>
CRM Demo: Emily Harris
Call Log Activity Add Note More
Stage: Connected 💙
Overview Activity Associations About Quotes L
Next activity
Follow-up Re:Call on CRM Demo: Emily Due January 16, 2025 at 10:00
Create next activity (+)
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Logged call Emily called me to talk through scheduling a tour January 13, 2025 at 11:56
Task CRM Demo: Emily Harris: Reminder to either contact lead or m [January 11, 2025 at 12:04]
Task CRM Demo: Emily Harris: 1st attempt to connect (January 11, 2025 at 05:00)
Deal score Learn more
Home Contacts Tasks Databasets Search



# Note: If you move a Deal into a stage that needs more information, you will be prompted with the information that needs updated.

For example: If you move a Deal into Tour Scheduled, HubSpot will prompt you to update information about when the tour is scheduled for.

15:03		ul S	
Cancel	Move Deal		Save
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About this deal			
Tour Date/Time			
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October Novembe	er 4	2022	
Decembe	er 5	2024	
January	6	2025	
February	/ 7	2026	
April	8	2027	
_		_	



# To see specific updates to the Deal, Click on the Activity tab

Here you will see the Deal updates as well as the Task created from the Logged call.

11:58    II         (19)       CRM Demo: Emily Harris       Call       (1)       Call       (1)
Overview Activity Associations About Quotes L (Filter Activity (12/12) ~
Upcoming Task : Jan 16, 2025 at 10:00 Call Follow-up Re:Call on CRM Demo: Emily Harris
I > January 2025
Deal update Jan 13, 2025 at 1157 The deal was moved from Tour Scheduled to Connected
Deal update Jan 13, 2025 at 11.57 The deal was moved from New to Tour Scheduled
Home Contracts Tasks Dearboards Search



# Scroll down to see more updates on the Deal

In this case we can scroll to see the Logged call.

11:58 <b> 🔿 🗩</b>
CRM Demo: Emily Harris
Call Log Activity Ad Note More
Overview Activity Associations About Quotes Li
(Filter Activity (12/12) V)
The deal was moved from Tour Scheduled to Connected
Deal update Jan 13, 2025 at 1157
The deal was moved from New to Tour Scheduled
Logged call : Jan 13, 2025 or 11:56
Hannah Munaz logged a call Emily called me to talk through scheduling a tour
Task : Jan 11, 2025 of 12:04 (To-die)
CRM Demo: Emily Harris: Reminder to either
Home Contacts Tasks Dashboards Search



### **Click on Associations**

Here you will see the Pro connected to the Deal under the Contacts section. If there is any other information that needs to be added about the Deal, add that here.

<ul> <li>CRM Demo: En Deel</li> <li>Call</li> <li>Call</li></ul>	y Harris : Mare More
Overview Activity Associations	About Quotes Li
Contacts Emily Harris dummyemail.com	•
Add contacts	$\oplus$
Add companies	$\oplus$
Add deals	(  i )
Add tickets	$\oplus$
Add locations	(  i )
<ul> <li><b>*</b></li> <li><b>*</b></li> </ul>	<b>a</b>



To add an Association - in this case a Location - Click the plus button next to Add locations

14:04    II        (3)     CRM Demo: Emily Harris Deed       (2)     (1)       (2)     (2)       (2)     (2)       (2)     (2)       (2)     (2)       (3)     (2)       (3)     (2)       (4)     (2)       (3)     (2)       (3)     (2)       (4)     (2)       (4)     (2)       (4)     (2)	14:04	
Contects Contec	(3)       CRM Demo: Emily Harris         Deal       (1)         Coll       (1)         Log Activity       Add Nore         Strage: Connected V       (1)         Contracts       (1)         Emily Harris       (1)         dummyemoli.com       Add contacts         Add contacts       (1)         Add deals       (1)         Add locations       (1)	14:0
Coll Log Activity Add Note More Stoge: Connected Contexts Emily Harris Add contacts Add	Coll       ++       Image: Connected       Image: Connected         Stope: Connected       Image: Connected       Image: Connected       Image: Connected         Overview       Activity       Associations       About       Quote         Contacts       Image: Connected       Image: Connected       Image: Connected       Image: Connected         Contacts       Image: Connected       Image: Connected       Image: Connected       Image: Connected       Image: Connected         Contacts       Image: Connected       Image: Connected	< (
Call Log Activity Add Note More Stage: Connected Overview Activity Associations About Quotes Contacts Emily Harris dummyemol.com Add companies Add companies Add deols Add locations (+)	Coll Log Activity Add Note Hore  Strage: Connected   Overview Activity Associations About Quote  Contexts  Emily Harris dummyemail.com  Add contacts  ()  Add contacts  ()  Add deals  ()  Add locations ()	٩
Stage: Connected ▼         Overview Activity Associations About Quotes         Contacts         Emily Harris dummyemol.com         Add contacts         Add companies         Add deals         Add tickets         Add locations	Strage: Connected V       Overview     Activity       Associations     About       Querter     Add contacts       Add contacts     ()       Add deals     ()       Add locations     ()	Co
Overview Activity Associations About Quotes Contacts Emily Harris dummyemol.com Add contacts Add companies Add deals Add locations (+) Add locations	Overview     Activity     Associations     About     Quete       contacts	
Contects         Emily Harris         dummyenal.com         Add contacts         Add companies         Add deals         Add tickets         Add locations	Contacts         Emily Harris         dummyemal.com         Add contacts         Add companies         Add deals         Add tickets         Add locations	Overview
Emily Harris       :         dummyemalizem       :         Add contacts       :         Add companies       :         Add deals       :         Add tickets       :         Add locations       :	Emily Harris         dummyemal.com         Add contacts       ()         Add companies       ()         Add deals       ()         Add tickets       ()         Add locations       ()	Contacts
Add contacts     (+)       Add companies     (+)       Add deals     (+)       Add tickets     (+)       Add locations     (+)	Add contracts     (c)       Add companies     (c)       Add deals     (c)       Add tickets     (c)       Add locations     (c)	Emily Ho dummyem
Add companies     (+)       Add deals     (+)       Add tickets     (+)       Add locations     (+)	Add companies     ()       Add deals     ()       Add tickets     ()       Add locations     ()	Add con
Add deals     (+)       Add tickets     (+)       Add locations     (+)	Add deals     ()       Add tickets     ()       Add locations     ()	Add com
Add tickets (+) Add locations (+)	Add tickets ( Add locations (	Add dea
Add locations (+	Add locations (	Add tick
		Add loco
		A Home
Home Company Taxa Databased Secret	Henry Contracts Table Desibored See	
Home Contacts Table Dailboards Search	Heme Contacts Tasks Destitucards See	



Search for a Location and check off the Location for the Deal

Cancel     Add Locations     Done       C Demo     Image: CRM Demo     Image: CRM Demo       Demo Location2     Image: Demo Locations     Image: CRM Democracy       Image: Demo Locations     Image: Democracy     Image: CRM Democracy       Image: Demo Locations     Image: Democracy     Image: CRM Democracy       Image: Democracy     Image: Democracy     Image: Democracy       Image: Democracy     Image: Democracy	14:0
CRM Demo         Demo Location2         Demo Locations             "Demo"       Democrats         Demo Locations             "Demo"       Democrats             a s d f g h j k l             Q w e r t y u i o p         a s d f g h j k l         Q z x c v b n m	Cancel
CRM Demo Demo Location2 Demo Locations	Q Demo
□ Demo Location2         □ Demo Locations         "Demo"       Democrats         Q       W       P         T       Y       U       I       O         A       S       d       f       g       h       j       k       I         Q       Z       X       C       V       b       n       m<	
Demo Locations         "Demo"       Democrats       Democracy         Q       W       P       T       Y       U       I       O         A       S       d       f       g       h       j       k       I         Q       Z       X       C       V       D       m       ⊠	Dem
"Demo"       Democrats       Democracy         q       w       e       r       t       y       u       i       o       p         a       s       d       f       g       h       j       k       l         Q       z       x       c       v       b       n       m       <	Dem
"Demo"     Democrats     Democracy       q     w     e     r     t     y     u     i     o       a     s     d     f     g     h     j     k     l       Q     z     x     c     v     b     n     m     ⊗	
"Demo"     Democrats     Democracy       q     w     e     r     t     y     u     i     o     p       a     s     d     f     g     h     j     k     l	
"Demo         Democrats         Democracy           q         w         e         r         t         y         u         i         o         p           a         s         d         f         g         h         j         k         l           Q         z         x         c         v         b         n         m<	
q w e r t y u i o p a s d f g h j k l ☆ z x c v b n m ⊗	"Demo
asdfghjkI ☆ zxcvbnm ⊗	q w
	a s
	δZ

STEP 31

# **Click Done**

14:05					.1	হ	D.
Cancel	A	Add L	_ocati	ons		ſ	Done
Q Demo							0
CRM D	Jemo						
Demo !	/ Locati	ion2					
Demo	) Locati	ions					
		1 s	elected	1			
"Demo"		Der	mocrat	s	C	emod	racy
q w e	ə r	t	у	u	li	0	p
a s	d	f	g	h	j	k	I
φz	x	с	V	b	n	m	$\otimes$
123 😅					ENES	re	turn
							Ŷ
	_		-	-	-		



## The Location will be added

Note: It can take a second for the Deal to update. Pull down on the screen to refresh it.

14:05	ul 🗢 🔲
CRM Dem	o: Emily Harris
Call Log Activity Stage: Cor	Add Note More
Overview Activity Assoc	iations About Quotes
Contacts	
Emily Harris dummyemail.com	:
Add contacts	$( \pm )$
Locations	
CRM Demo	:
Add locations	$\oplus$
Add companies	$\oplus$
Add deals	$\oplus$
Add tickets	$\oplus$
1 location associated	
Home Contacts Tax	ks Dashboards Search



# Access all information about the Deal on the About tab

Here you will see information on:

- $\cdot$  Deal Details
- Tour Info
- Deal Discovery
- Lead Source
- Campaign Info
- Closing Details

Utilize this tab to update information as you're talking to a Pro.

	11:58	ul S	
<	(19) CRM Demo: B	Emily Harris	:
	Call Log Activity A	dd Note More	)
	Stage: Connecte	ed 🗸	
ew	Activity Associations Abo	out Quotes L	ine items
	Edit Deal		
•	ờ Details		~
D	Jeal Tags		
Di M	)eal Origin Manual/Hubspot		
C	ocation CRM Demo		
C	Deal Name CRM Demo: Emily Harris		
P) 1	'hone Number 1729-222-1234		
Er	:mail Address emily.harris@dummyemail.c	com	
Le	ead Channel Type Inbound		
	and Channel		
1 H	fome Contacts Tasks	Dashboards	Q Search



If you need to add missing information or update existing information, Click Edit Deal at the top of the About tab



# Scroll to the section that needs updated and Click on the Item

For this example, the Current Situation needed to be filled in.

11:59	1:59		all ≎ ∎	D
Cancel	əl	Edit Deal		Save
Has the le	the lead toured	ed Sola?		•
🔎 Deal I	eal Discovery	у		~
Primary Serv Other	ry Service r			•
Other Ser	r Services			•
Looking to M Unsure	ig to Move Ire			•
Current S	ent Situation			•
Weekly R	kly Rate			
Studio Type Double	Type			•
No of Chairs 4	Chairs			•
Studio Pr	io Preference			•
Intereste	ested in Sharii	ring		•
Current S	ent Situation E	Ends		
Interest Leve Warm	st Level (how likely N	y are they to close)		•
🗿 Lead	ead Sour <u>ce</u>		_	^



Click on a drop down item or fill in the information

11:59				.1	<b>२</b> ∎	D
Cancel	Curr	urrent S	: Situat	tion		Done
Q Search						
Commis	nissionec	1ed base	sed tra	ıditional	salon	
Establis Landlor	lished Bu lord Rent	Busines ental	ess Owr	ner -		
Gradua	uated fro	from Scł	chool			
🖌 In Scho	hool/Get	≽etting L	J Licens	sed		
Booth F	1 Rent					
A Comp	npetitor	or				
Expand	nding Bu	Business	ss Own	ner		
Working	ing from	m Home	me - Inc	depende	ent	
Returni	ning to V	o Work I	< Indus	stry		
Other	1					
Canvas	as Me					
		Clea	ar all			

#### STEP 37

### **Click Save**

11:59		<b>'II ≎</b> (	D
Cancel	Edit Deal		Save
Has the lead tou	ured Sola?		•
🔎 Deal Discove	/ery		~
Primary Service Other			•
Other Services			•
Looking to Move Unsure			•
Current Situation In School/Gettir	ing Licensed		•
Weekly Rate			
Studio Type Double			•
No of Chairs 4			•
Studio Preferenc	ıce		•
Interested in Sharing Yes	g		•
Current Situatio	on Ends		
Interest Level (how like	likely are they to close)	)	•
🗿 Lead Sour <u>ce</u>	e	_	^



# The Deal will be updated

11:59 <b>.</b> 🕈 🗩	
CRM Demo: Emily Harris	
Call Log Activity Add Note Hore	
ew Activity Associations About Quotes Line items	
Looking to Move Unsure	
Current Situation In School/Getting Licensed	
Weekly Rate	
Studio Type Double	
No of Chairs 4	
Studio Preference	
Interested in Sharing Yes	
Current Situation Ends	
Interest Level (how likely are they to close) Warm	
Home Contracts Tasks Destributions Search	



If you need to leave a note about the Deal, Click the Add Note button at the top of the Deal

11:59 .II 🗢 🗩
CRM Demo: Emily Harris :
(e)     (+)       Call     Log Activity       Add Nore     More
Stage: Connected V
ew Activity Associations About Quotes Line items
Looking to Move Unsure
Current Situation In School/Getting Licensed
Weekly Rate
Studio Type Double
No of Chairs 4
Studio Preference
Interested in Shoring Yes
Current Situation Ends
Interest Level (how likely are they to close) Warm
Image: Contracts         Tasks         Image: Contracts         Deshboards         Search

#### STEP 40

#### Include any relevant information you need recorded to the Deal.

Notes are a great way to log information that you can refer back to on the Activity timeline.



### **Click Save**





The app will let you know the Note was logged. Click View on the notification to see the Note in the Activity timeline

12:00
CRM Demo: Emily Harris
singer connected v
ew Activity Associations About Quotes Line items
Looking to Move
In School/Getting Licensed
Weekly Rate
Studio Type
Double
No of Chairs 4
Studio Preference
Interested in Sharing Yes
Current Situation Ends
Note logged View
Home Connacts tasks Dashboards Search



You'll be t	aken to	the No	ote in t	he Activity	y timeline
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	0.04			
12:0	2:01		all 3	•
< (	19 CRM Deal	1 Demo: Ei	mily Harri	s i
(		+		
c	Call Log A	Activity Adr	d Note Mo	re
	Sta	age: Connected	1 V I	
		-		
Overview	ew Activity	Association	ns About	Quotes L
Filter Activ	:tivity (12/12) 🗸	$\overline{}$		
JUIT 10, 21	, EVES UI 10.00 C	Sun		
🕗 Folic	ollow-up Re:Call	l on CRM Der	mo: Emily Ha	ris
<b>⊙</b> 1				>
January 2	y 2025			
Note				:
Jan 13, 20	, 2025 at 11:59			1
Other de X date	details from Em	nily: - is looki	ing to move i	n by
<b>③</b> 1				>
Deal up	update			
Jan 13, 21	, 2025 at 11:57			
The deal to Conne	al was moved f nected	from Tour Sc	cheduled	
*			12	Q
Home	Contacts	Tasks	Dashboards	Search
	_		_	

# # Scheduling a Tour

15 Steps



# Click into a Deal

Cects Pipelin  All deals My deals Add Views (2/5)  A	✓     Deals     Pipelin         All deals     My deals     Add Views (2/5)         I sesure     Image: Control by Create date     Image: Control by Create date         I areas     Image: Control by Create date     Image: Control by Create date         I areas     Image: Control by Create date     Image: Control by Create date         I areas     Image: Control by Create date     Image: Control by C	Deds     Pipeli       All deals     My deals     Add Views (2/5)       I deals     My deals     Add Views (2/5)       I securits     Image: Security of the securety of the securety	Control Con
All deals My deals Add Views (2/5) 13 results Sorted by Create date New 2 deals   50 rotal (9) Hannah Munoz Demo Test Jon 13, 2025 of 11:3 (9) Demo Locations: Michael Brown Jon 10, 2025 of 12:04	All deals My deals Add Views (2/5) 13 results Sorted by Create date	All deols My deals Add Views (2/5) I Treadit Sorted by Create date ↓ New 2 deols 15 to total 10 Hannah Munoz Demo Test Jan 13, 2025 at 11:53 10 Demo Locations: Michael Brown Michael Brown Michael Brown	All decis My deal Add Views (2/5) 33 results 5orted by Control Control 10 Mannah Munoz Demo Test 10 Demo Locations: Michael Brown Mar Nik Jan 10, 2025 or 12:04
12 results Sorted by Create date New 2 decisi 50 total	13 results Sorted by Create date	13 results Sortel by Create date ↓ 2 deals  \$0 total 0 Hannah Munoz Demo Test Jan 13, 2025 or 11:53 (1) Demo Locations: Michael Brown Michael Brown Jan 20, 2025 or 12:04	Breadfs New 2 (deois   30 total ① Annah Munoz Demo Test Jan 13, 2025 or 11:53 ① Demo Locations: Michael Brown Michael
19       Hannah Munaz Demo Test         Jan 13, 2025 or 11:53         10       Demo Locations: Michael Brown         Michael Brown         Jan 10, 2025 or 12:04	Hannah Munoz Demo Test         Jan 13, 2025 at 11:53         10         Demo Locations: Michael Brown         Artike         Jan 10, 2025 at 12:04	19       Hannah Munoz Demo Test         Jan 13, 2025 ori 11:53         19       Demo Locations: Michael Brown         An-Biak         Jan 10, 2025 ori 12:04	19       Hannah Munoz Demo Test         Jan 13, 2025 or 1133         10       Democartions: Inchaele Brown         Markit         Jan 10, 2025 or 1204
			4
			•

#### STEP 45

# At the top, Click the More button

14:24 (6:21 (1999) •
C 19 Demo Locations: Michael Brown :
Call Log Activity Add Note More
Stage: New 🗸
Overview Activity Associations About Quotes Li
Next activity
Create next activity (+)
Recent activity
Task Demo Locations: Michael Brown: Reminder to either contact le January 11, 2025 at 12:04
Task Demo Locations: Michael Brown: 1st attempt to connect January 11, 2025 at 0500
Deal score Learn more
19 Since Jan 10, 2025
Anne         Contacts         Tasks         Desit/Deards         Search



# **Click Create Meeting**

14:24 (624 (1)) (1)) Demo Locations: Michael Brown : Call Log Activity Add Note More Stage: New V Overview Activity Associations About Quotes L	
Next activity	
Create next activity	
Recent activity	
Task Demo Locations: Michael Brown: Reminder to either contact le January 11, 2025 at 12:04	
More	
Create Task	
Send Email	
📅 Create Meeting	
§ Enroll in Sequence	
Cancel	



## Update the Tour information

This includes:

- Meeting title
- Meeting description
- Start date and time
- End date and time
- Meeting Type
- $\cdot$  Location
- Internal notes (optional) these are notes only you can see
- Attendees





You will need to manually add the Pro to the meeting by searching for them. Click the Plus on the Attendees section





# **Click Contact**

12:05	al 3	* D
Cancel Create	e meeting	Save
@		
Start date January 24, 2025	Start time HST 12:00	Ø
End date January 24, 2025	End time HST 12:30	œ
Check availability		>
Meeting Type  Meeting Sche	ing Outcome eduled	
Location Address		•
Address 1234 Rainbow Rd		
Internal notes Notes only you can see	e	
@		
Add a	attendees	
Co	ontact	
Tea	ammate	
Ca	ancel	

#### STEP 50

### Search and choose the Pro

Cancel     Add Contacts     Done        Michael brown         Michael Brown         Michael Browning         a s d f g h j k l         a s d f g h j k l         z x c v b n m	Add Contacts Done   Allchael brown Image: Contact of the second sec
Q Michael Brown         Image: Michael Brown         Michael Browning         Selected         Brown*         brownie       browns         Q W e r t y u i o p         a s d f g h j k l         Q z x c v b n m ⊗	Michael brown Michael Brown Michael Brown Michael Browning Michael Browning Michael Browning Michael Browning Michael Browning Michael Browning Wie r t y u i o p a s d f g h j k i  2 x c v b n m   2 x c v b n m
Michael Brown         Michael Brown         Michael Browning         Yours         Drowning         Michael Browning         1 selected         "brown"       brownis         Q       Q         Q       Q         Q       Q         Q       Z         X       C         V       D         Q       X         C       V         D       X	Michael Brown         Michael Brown         Michael Browning         Michael Browning         Michael Browning         Michael Browning         Michael Browning         Michael Browning         Wichael Browning         1 selected         *brown*       brownie         y w e r t y u i o p         a S d f g h j k l         > z x c v b n m ≪         23 @
✓       Michael Brown Tokenol.com         Michael Browning         Michael Browning         Michael Browning         Michael Browning         Michael Browning         Michael Browning         Selected         "brown"       brownie         Brownig         "brown"       brownie         a s d f g h j k l	Michael Browning We r t y u i o p  a s d f g h j k l  2 x c v b n m  as d f g h j c l
Michael Browning         Michael Browning         Michael Browning         Iselected         "brown"       brownie         g w e r t y u i o p         a s d f g h j k l         Q z x c v b n m ∞	Michael Browning          Michael Browning         Michael Browning         Michael Browning         Iselected         "brown"       browns         W e r t y u i o p         a s d f g h j k l         2 x c v b n m X         Image: State sta
Michael Browning         Michael Browning         Michael Browning         1 selected         "brown"       brownie         g w e r t y u i o p         a s d f g h j k l         C x c v b n m ∞	Michael Browning          Michael Browning         Michael Browning         Michael Browning         Iselected         "brown"       brownie         W e r t y u i o p         a s d f g h j k l         C z x c v b n m ≪         23 @
Michael Browning I selected "brown" brownie browns q w e r t y u i o p a s d f g h j k l Q z x c v b n m x	Michael Browning Michael Browning "brown" browne browns a w e r t y u i o p a s d f g h j k l c z x c v b n m c z w erturn
Michael Brownies       I selected       "brown"     brownie     browns       q     w     e     r     t     y     u     i     o     p       a     s     d     f     g     h     j     k     l       Q     z     x     c     v     b     n     m<	Michael Brownies I selected "brown" brownie browns a w e r t y u i o p a s d f g h j k l c z x c v b n m c 23
"brown"         brownie         browns           q         w         e         r         t         y         u         i         o         p           a         s         d         f         g         h         j         k         l           therefore         z         x         c         v         b         n         m         s	"brown" brownie browns a w e r t y u i o p a s d f g h j k l c z x c v b n m ≪ 23 @ return
q w e r t y u i o p a s d f g h j k l ☆ z x c v b n m ≪	q       w       e       r       t       y       u       i       o       p         a       s       d       f       g       h       j       k       l         c>       z       x       c       v       b       n       m       return         23
asdfghjkl ☆ zxcvbnm ⊗	a s d f g h j k l
	23     ☺      return
	23 BIES return



### **Click Done**





# Once the meeting is set, Click Save

Cancel     Create meeting     Save       Stort date     Stort fille     Stort fille     Stort fille       January 24, 2025     Stort fille     Stort fille     Stort fille       End date     January 24, 2025     End fille     Stort fille       January 24, 2025     End fille     Stort fille     Stort fille       January 24, 2025     End fille     End fille     Stort fille       January 24, 2025     End fille     End fille     Stort fille       Check availability     >     Stort fille     Stort fille       Meeting Type     Meeting Outcome     Stort fille     Stort fille       Lacation     Address     Image: Stort fille     Stort fille       Address     Address     Image: Stort fille     Stort fille       Internal notes     Notes only you will see     Image: Stort fille     Image: Stort fille       Internal notes     Image: Stort fille     Image: Stort fille     Image: Stort fille       Matchael Brown X     Image: Stort fille     Image: Stort fille     Image: Stort fille       Meeting host     Image: Stort fille     Image: Stort fille     Image: Stort fille       Meeting host     Image: Stort fille     Image: Stort fille     Image: Stort fille
Stort date       Stort time HST       II:30         January 24, 2025       End time HST       II:200         January 24, 2025       End time HST       II:200         Check availability       >         Meeting Type       Meeting Outcome       IIII         Location       Scheduled       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
End date     End time HST     Image: Second
Check availability > Meeting Type Check availability Scheduled Lacation Address 1234 Rainbow Rd Littermainates Meeting host Hannah Munoz Associated with Demo Lacations: Michael Brown X
Meeting Type Meeting Outcome Scheduled Coordinate Scheduled Address Address 1234 Rainbow Rd Internal notes Notes only you will see @ Attendees & Michael Brown X Meeting hest Hannah Munoz Associated with @ Demo Locations: Michael Brown X (+)
Lacation Address Address 1234 Rainbow Rd Internal notes Notes only you will see © Attendes & Michael Brown X Meeting host Hannah Munoz Associated with
Address 1234 Rainbow Rd Internal notes Notes only you will see @ Attendes # Michael Brown X Meeting host Hannah Munoz Associated with @ Demo Locations: Michael Brown X (+)
Internal notes Notes only you will see  C  Attendees  Michael Brown ×  Meeting host Hannah Munoz  Associated with  Demo Locations: Michael Brown ×
Attendees            Michael Brown X        Meeting host       Hannah Munoz       Associated with            • Demo Locations: Michael Brown X
Attendees    Michael Brown X    Meeting host Hannah Munoz  Associated with   Demo Locations: Michael Brown X
Meeting host Hannah Munoz Associated with Demo Locations: Michael Brown X (+)
Associated with



# **Click Continue and send**

By clicking this you'll send an email invite to the Pro.

Cancel     Create meeting     Save       Stort date     Stort time HST     It is 0       January 24, 2025     It is 0     End time HST       January 24, 2025     It is 0     End time HST       January 24, 2025     It is 0     It is 0       Check availability     >       Check availability     >       Meeting Type     Meeting Outcome       Cootione     Save and send email invite to all attaches. Internal attaches. Internal attaches.       Locotione     Save and send email invite to all attaches. Internal attaches.       Iz34 R     Continue and send       Internation     Back to editing       Imendes     It is 0       Metring host     It is 0       Heaningh Munoz     Associated with       Image Demo Locations: Michael Brown X     It is 0	Cancel     Create meeting     Save       Stort date January 24, 2025     Stort filme HST 11:30     R       End date January 24, 2025     End filme HST 12:00     R       End date January 24, 2025     End filme HST 12:00     R       Check availability     >       Meeting Type     Meeting Outcome Tour     Image: Start filme HST 12:00       Maddres     Save and send email invite attendess:     Image: Start filme HST 12:00       Address     You'll send an email invite to all attendess:     Image: Start filme HST 12:00       Address     Continue and send     Image: Start filme HST 12:00       Address     Continue and send     Image: Start filme HST 12:00       Address     Continue and send     Image: Start filme HST 12:00       Attendes     Image: Start filme HST 12:00     Image: Start filme HST 12:00       Attendes     Image: Start filme HST 12:00     Image: Start filme HST 12:00       Attendes     Image: Start filme HST 12:00     Image: Start filme HST 12:00       Attendes     Image: Start filme HST 12:00     Image: Start filme HST 12:00       Attendes     Image: Start filme HST 12:00     Image: Start filme HST 12:00       Attendes     Image: Start filme HST 12:00     Image: Start filme HST 12:00       Attendes     Image: Start filme HST 12:00     Image: Start filme HST 12:00       Attendes     <	14:27			∥ ≎ 🗩
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_	& Michael Brown ×	Associated with	ations: Micha	Michael Brown ×	÷



The Deal will automatically update to the Stage: Tour Scheduled

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14-29 III	rown
C (19) Denio Locations. Michael P	TOWIN
• + 🗷 (	
Call Log Activity Add Note M	re
Stage: Tour Scheduled 🗸	
Overview Activity Associations About	Quotes
Filter Activity (12/12)	
Upcoming	
Meeting	:
Jan 24, 2025 at 11:30 30 minutes	
Hannah Munoz has a scheduled meeting with Michae	Brown
lour	
<b>⊘</b> 3	>
Marting	
Jan 24, 2025 at 11:30 30 minutes	
Hannah Munoz has a scheduled meeting with Michar	Brown
Tour	
<b>⊘</b> 3	>
Meeting	:
Jan 24, 2025 at 11:30 30 minutes	
A 2 🗆 🖬	Q
Home Contacts Tasks Dashoodras	search



In the Kanban view, the Deal will move into the Tour Scheduled column of the Leasing Pipeline





The Tour Info on the About tab will automatically be updated to show the Tour Status of Scheduled with the Tour Date/Time for when the Tour was scheduled

14:33	al S	
< 19 Demo Location	ns: Michael Br	own :
Call Log Activity	Add Note Mor	re
Stage: Iour Sch	ieduled V	
ew Activity Associations A	bout Quotes	Line items
Create Date Jan 10, 2025		
Close Date		
Tour Info		~
Tour Status Scheduled		
Tour Date/Time Jan 24, 2025 at 11:30		
Has the lead toured Sola?		
🔎 Deal Discovery		~
Lead Quality (badge)		
Primary Service Lashes		
Other Services		
Home Contacts Tasks	a Dashboards	Q Search



In the Activity tab, you'll see the Tour

14:29       Image: Control in the contro
Year       Year       Year       Year       Year         Year       Year       Year       Year       Year       Year         Year       Year       Year       Year       Year       Year       Year       Year         Year       Ye
Image: Construction       Image: Construction<
Stage: Tour Scheduled ∨         Overview       Activity       Associations       About       Quotes       L         Fifter Activity (12/12) ∨       Upcoming       I       I       I       I         Upcoming       I
Overview       Activity       Associations       About       Quotes       L         Filter Activity       (12/12)       Image: Constraint of the second of the sec
Filter Activity (12/12)         Upcoming         Meeting       "         Jan 24, 2025 at 1130       30 minutes         Hannah Munch has a scheduled meeting with Michael Brown Tour       *         Ø 3       >         Meeting       "         Ian 84, 2025 at 1130       30 minutes         Hommah Muncz has a scheduled meeting with Michael Brown Tour       "         Ø 3       >         Meeting       "         Jan 24, 2025 at 1130       30 minutes         Meeting       "         Jan 24, 2025 at 1130       30 minutes         Jan 24, 2025 at 1130       30 minutes         Ian 24, 2025 at 1130       30 minutes
Upcoming   Meeting   Gam 24, 2025 or 11:30 30 minutes  Hormah Munaz has a scheduled meeting with Michael Brown Tour  Gam 24, 2025 or 11:30 30 minutes  Meeting   Gam 3  Meeting   Meeting   Gam 3  Meeting   Mee
Meeting       ;;         Jan 24, 2025 at 1130       30 minutes         Hommin Munce has a scheduled meeting with Michael Brown Tour       ;         3       >         Meeting       ;;         Jan 24, 2025 at 1130       30 minutes         Hammin Munce has a scheduled meeting with Michael Brown Tour       ;;         Jan 24, 2025 at 1130       30 minutes         Meeting       ;;         Jan 24, 2025 at 1130       30 minutes         Meeting       ;;         Jan 24, 2025 at 1130       30 minutes         Meeting       ;;         Jan 24, 2025 at 1130       30 minutes         Meeting       ;;         Jan 24, 2025 at 1130       30 minutes         Meeting       ;;         Jan 24, 2025 at 1130       30 minutes         Meeting       ;;         Jan 24, 2025 at 1130       30 minutes
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Meeting       ::         Jan 34, 2025 of 1130       30 minutes         Hannah Hunoz has o scheduled meeting with Michael Brown Tour       :         3       >         Meeting       ::         Jan 24, 2025 of 1130       30 minutes         Meeting       ::         Jan 24, 2025 of 1130       30 minutes         Mem       Contests         Track       Destibutors         Secret
Tour           3           Meeting           3m 24, 2025 or 11:30           3m 24, 2025 or 11:30           So minutes           Home           Carnors           Dasks           Dasks           Search
Image: Second
Meeting         :           Jan 24, 2025 at 11:30         30 minutes           Meeting         Image: Contracts         Image: Contra
Home Contacts Tasks Dashboards Search

#### STEP 58

If you Click on the Tour Activity, you will see all the details of the Tour





# **#** Scheduling a Tour Without Sending an Invite

9 Steps

If you have already scheduled a Tour or do not want to send an invite to the Pro, there is a way for you to keep your Deal updated without being on the desktop.

#### **STEP 59**

### On the About tab of the Deal, Click Edit Deal





# Scroll to Tour Info

Note: If the section is not already open, click on the arrow next to the section and it will open.

14:15		ul 🗢 🗩
Cancel	Edit Deal	Save
Lead Channel Industry Event		•
Original Traffic Sourc Offline Sources	e	•
Deal owner Hannah Munoz		•
Create Date Jan 29, 2025		
Close Date		
Tour Info		~
Tour Status		•
Tour Date/Time		
Has the lead tou	ired Sola?	•
🔎 Deal Discove	ery	^
Lead Source		^
🎉 Campaign I	nfo	^
🎯 Closing Detc	iils	^
_		



# Update Tour Status

14:15		ul 🗢 🗩
Cancel	Edit Deal	Sav
Lead Channel Industry Event		•
Original Traffic Source Offline Sources	.e	
<sup>Deal owner</sup> Hannah Munoz		
Create Date Jan 29, 2025		
Close Date		
📅 Tour Info		~
Tour Status Scheduled		
Tour Date/Time		
Has the lead tou	ured Sola?	
🔎 Deal Discove	ery	,
Lead Source	•	,
🌬 Campaign Ir	nfo	,
🎯 Closing Deta	ails	,
_		_



# Update Date/Time

Note: The time will automatically default to the current time. Ignore this.

ncel Edit Deal	Save
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ad Channel	
dustry Event	•
iginal Traffic Source ffline Sources	•
al owner annah Munoz	•
eate Date IN 29, 2025	
ose Date	
Tour Info	~
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as the lead toured Sola?	•
	Done
December 19 20	023
January 20 20	024
February 21 20	025
March 22 20	026
April 23 20	027



## Click Save

14:15		'II \$	
Cancel	Edit Deal		Save
Lead Channel Industry Event			•
Original Traffic Source Offline Sources			•
Deal owner Hannah Munoz			•
Create Date Jan 29, 2025			
Close Date			
Tour Info			~
Tour Status Scheduled			•
Tour Date/Time Feb 21, 2025 at 14:	4:15		٢
Has the lead toure	ed Sola?		•
			Done
Novembe Decembe January	er 18 20	2022 2023 2024	
February	y 21	2025	
March April	22 23	2026 2027 2028	

#### STEP 64

# You will need to update the Deal Stage. Click the Stage dropdown



### **Click Tour Scheduled**

#### STEP 66

# Make sure the Tour Date/Time is correct and filled in and Click Save





# Your Deal will be updated

14:20	ul 🔶	
< 18 Hannah M <sub>Deal</sub>	unoz Test Demo	•
Call Log Activity	Add Note More	)
Stage: Tour S	Scheduled V	
ew Activity Associations	About Quotes L	Line items
Create Date		
Jan 29, 2025		
Close Date		
Tour Info		~
Tour Status Scheduled		
Tour Date/Time Feb 21, 2025 at 14:15		
Has the lead toured Solo	1?	
🔎 Deal Discovery		~
Lead Quality (badge)		
Primary Service Hair		
Other Services		
Home Contacts	sks Dashboards	Q Search

# **#** Switching Pipelines

3 Steps

If you need to switch back and forth from the Leasing Pipeline to the Nurture Pipeline, follow these steps.



In the Deal Overview, Click Pipeline in the top right-hand corner





# **Click Nurture Pipeline**

Note: There will be a check mark next to the pipeline you are currently viewing.





### The Pipeline will be switched

The Deal Names have been blurred for confidentiality reasons.

<ul> <li>✓ Deals Pipelin</li> <li>Ald deals My deals Add Views (2/5)</li> <li><sup>194</sup> results Sorted by Create date</li> <li><sup>194</sup> Y results</li> <li><sup>197</sup> Y deals   \$0 total</li> <li><sup>197</sup> Jan 13, 2025 or 1 10:03</li> <li><sup>197</sup> Jan 13, 2025 or 1 10:24</li> <li><sup>197</sup> Jan 10, 2025 or 1 12:4</li> <li><sup>197</sup> Jan 10, 2025 or 1 12:4</li> <li><sup>197</sup> Jan 10, 2025 or 1 0:856</li> <li><sup>197</sup> Jan 8, 2025 or 0 9:08</li> <li><sup>197</sup> Jan 8, 2025 or 0 9:08</li> <li><sup>198</sup> (nurture)</li> <li><sup>197</sup> Jan 7, 2025 or 0 4:39</li> </ul>
All deals My deals Add Views (2/5) 194 results Sorted by Ceals date 97 deals [\$0 total 32 Jan 13, 2025 at 10:35 47 Jan 10, 2025 at 11:24 44 Jan 10, 2025 at 11:24 44 Jan 10, 2025 at 0:56 Inactive for a month 43 Jan 8, 2025 at 0:08 Jan 8, 2025 at 0:08
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97 decis [ \$0 total 32 Jan 13, 2025 at 10:03 47 Jan 10, 2025 at 11:24 44 Jan 10, 2025 at 08:56 Janetive for a month Jan 8, 2025 at 09:08 44 Jan 8, 2025 at 09:08 Jan 9, 2025 at 09:08
32 Jan 13, 2025 at 10:03 47 Jan 10, 2025 at 11:24 44 Jan 10, 2025 at 08:56 Janetike for a month 44 Jan 8, 2025 at 08:08 Jan 8, 2025 at 08:08 Jan 7, 2025 at 08:19
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44 Jan 8, 2025 of 09:08 48 (nurture) Jan 7, 2025 of 04:19
(nurture)

# # Accessing Dashboards

4 Steps

If you need to review any data or dashboards while you're on the go, follow these steps.



On any screen in the App, Click the Dashboards button





You'll be taken to the Dashboards. To change the Dashboard, Click the dropdown at the top of the screen





# Select the Dashboard you want to view

12:07	2:07	uI ≎ 🗩
Cancel	Select Dashboar	d
Q. Search d	rch dashboards	
Recently view	ly viewed	
Lead Gen	Generation	~
Other dashbo	dashboards	
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(My View)	/iew) Sales Dashboard - Clo	one
*Official* Salon Fre	cial* Diagnostic Dashboard n Freedom	-
30 Day Re	ay Reporting	
Brandon I	don May	
Canada	da   Master Stylist Acquisiti	ion Dashboard
Christoph	topher J. Vossen and Tanja	S. Vossen
Closed Lo	d Lost Reasons - SALON FR	REEDOM
Contact C	act Created	
		<b>.</b>

#### **STEP 74**

# The Dashboard will switch

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Dare Range         How was your experience using Reporting To using vold like to improve.         To us what you'd like to improve.         Store feedback         (My View) Request Leasing Info   Became Lead Darte   All Time         **         (My View) Lead conversion rate         (My View) Lead conversion rate	(My View) Sales Dashboa.	
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	Home Contacts Tasks Deathboard	Q Search



