

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 [View most recent version](#) 

Created by

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Creation Date

Jan 14, 2025

Last Updated

Feb 19, 2025

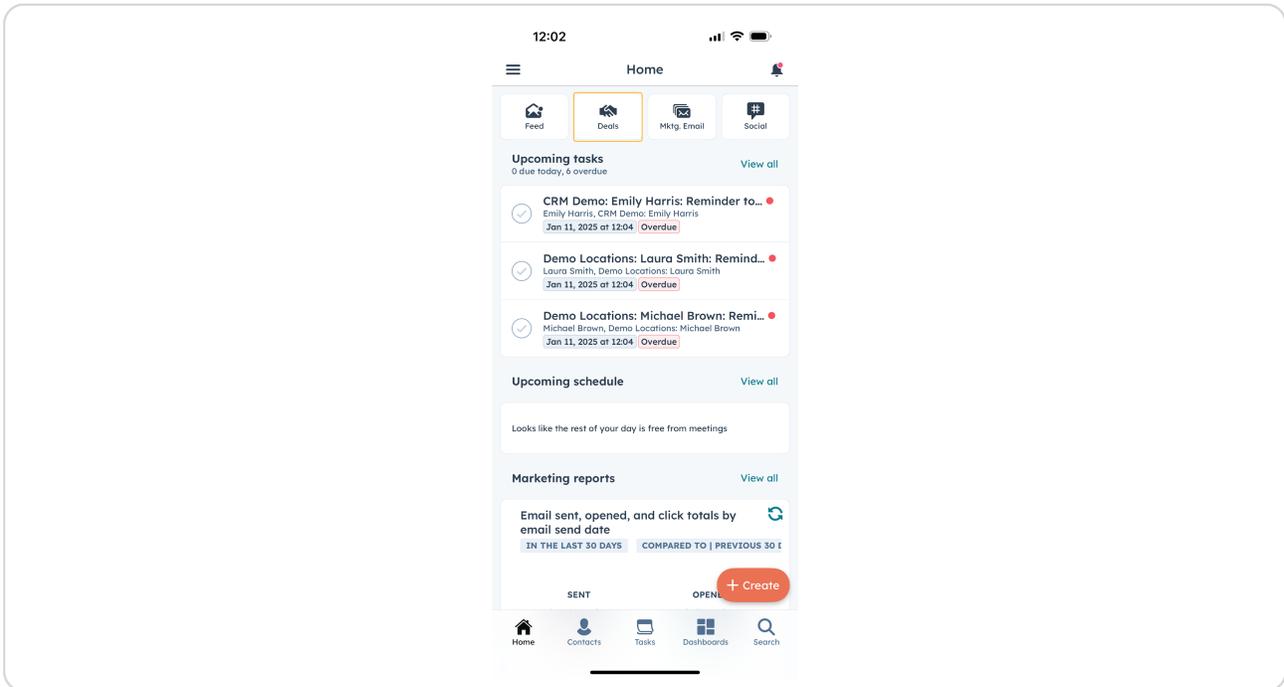
Open up the HubSpot Mobile App and Navigate to... 7 Steps

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

STEP 1

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

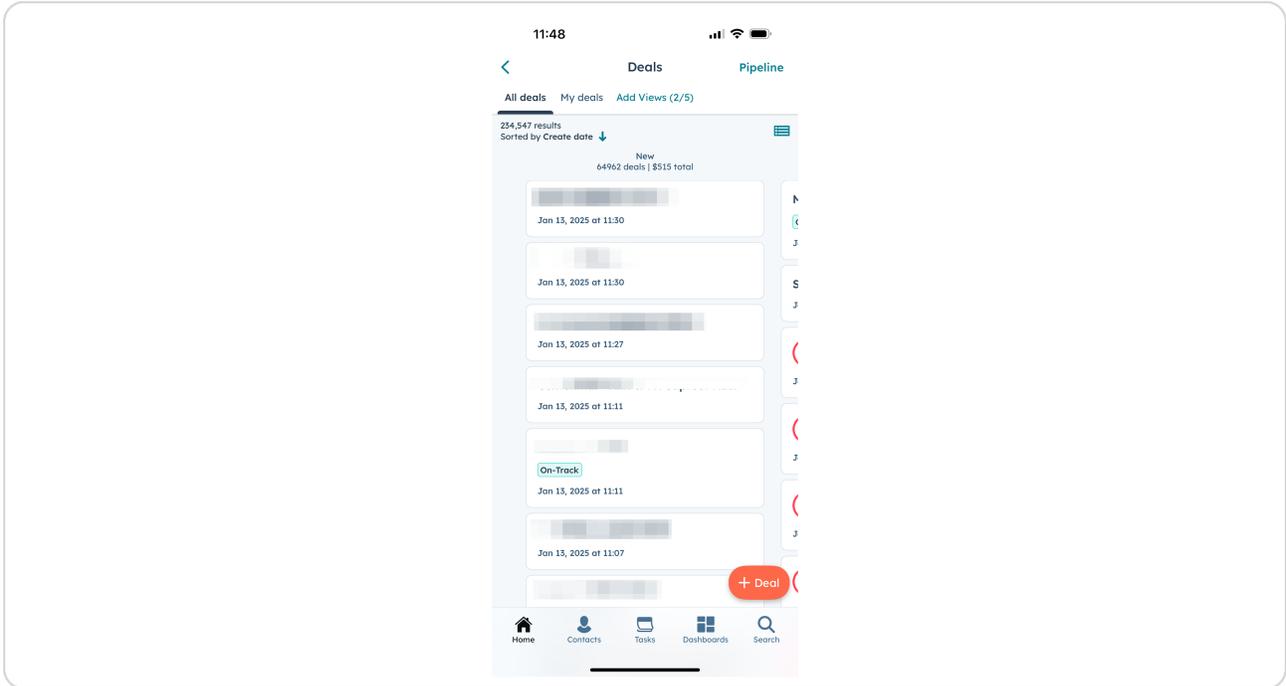
Note: On the Home Screen, you can click the Deals button. Everywhere else in the app you will want to use the hamburger menu at the top left-hand corner of the screen.



STEP 2

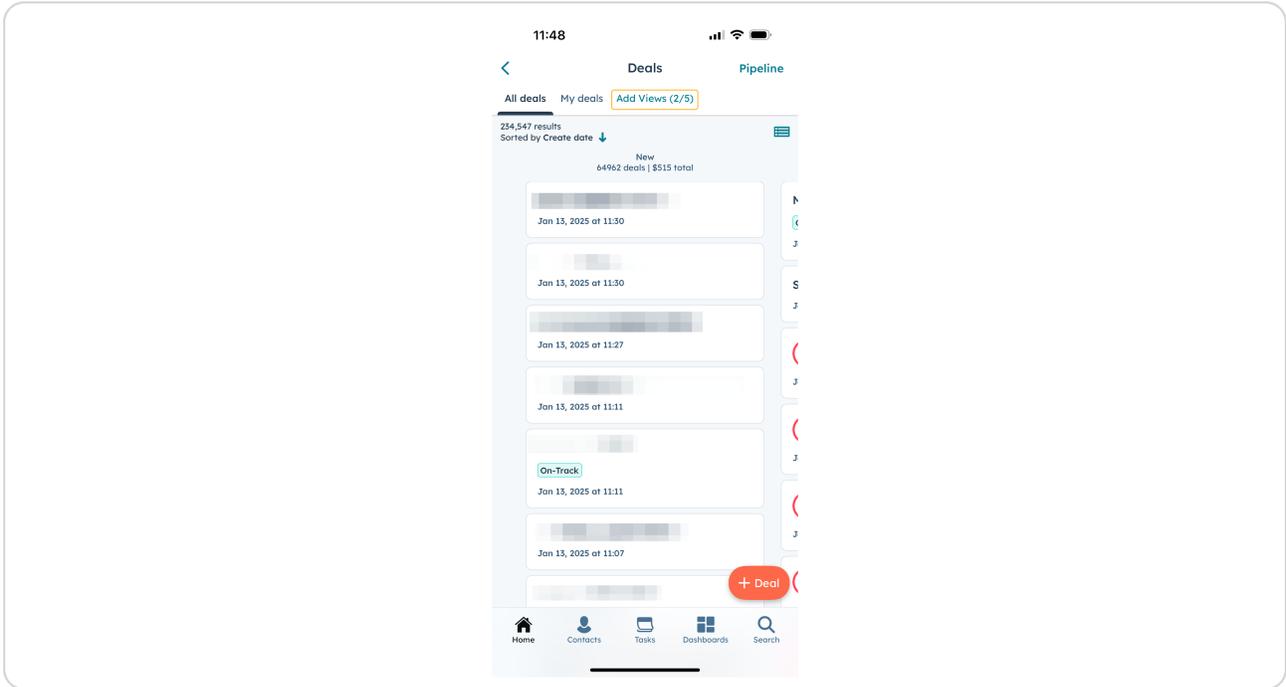
You'll be taken to the Deal Overview

Deal Names have been blurred for confidentiality reasons.



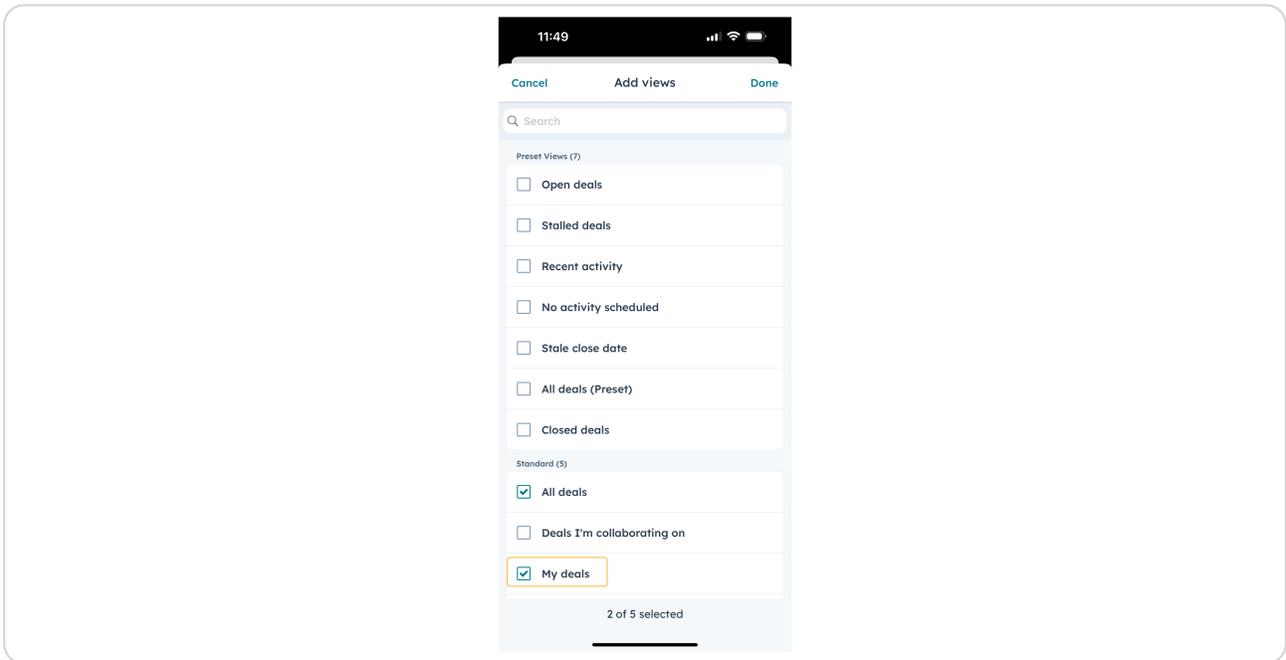
STEP 3

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



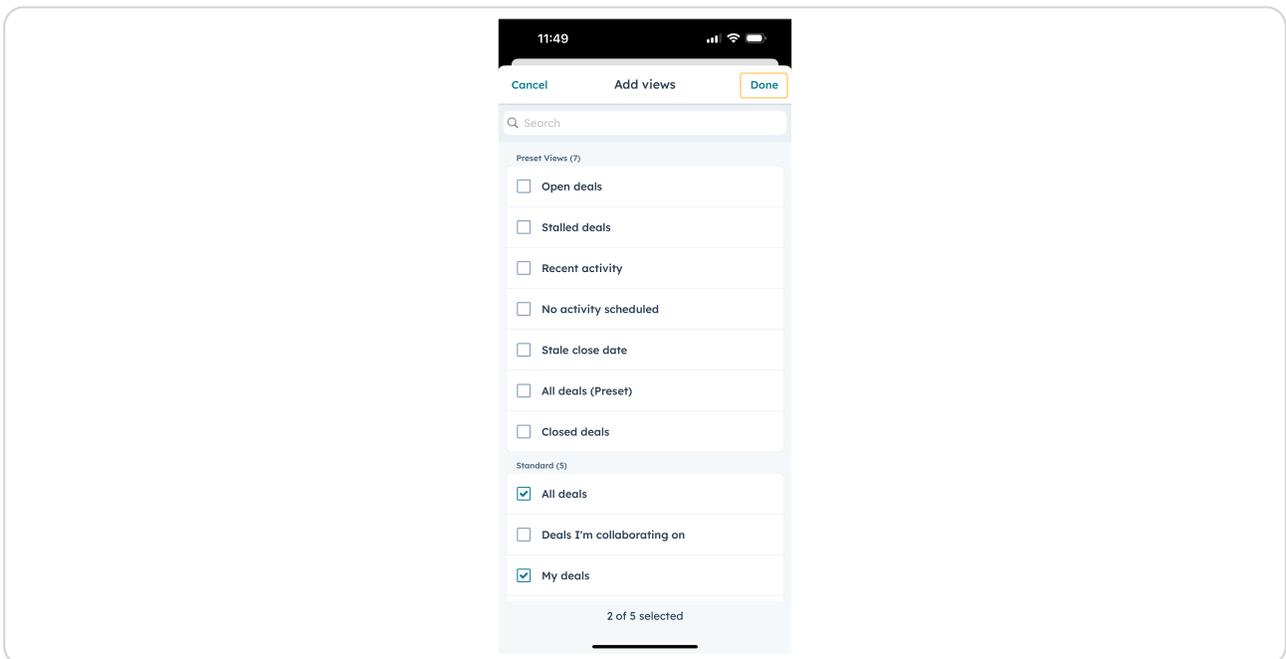
STEP 4

Check My deals



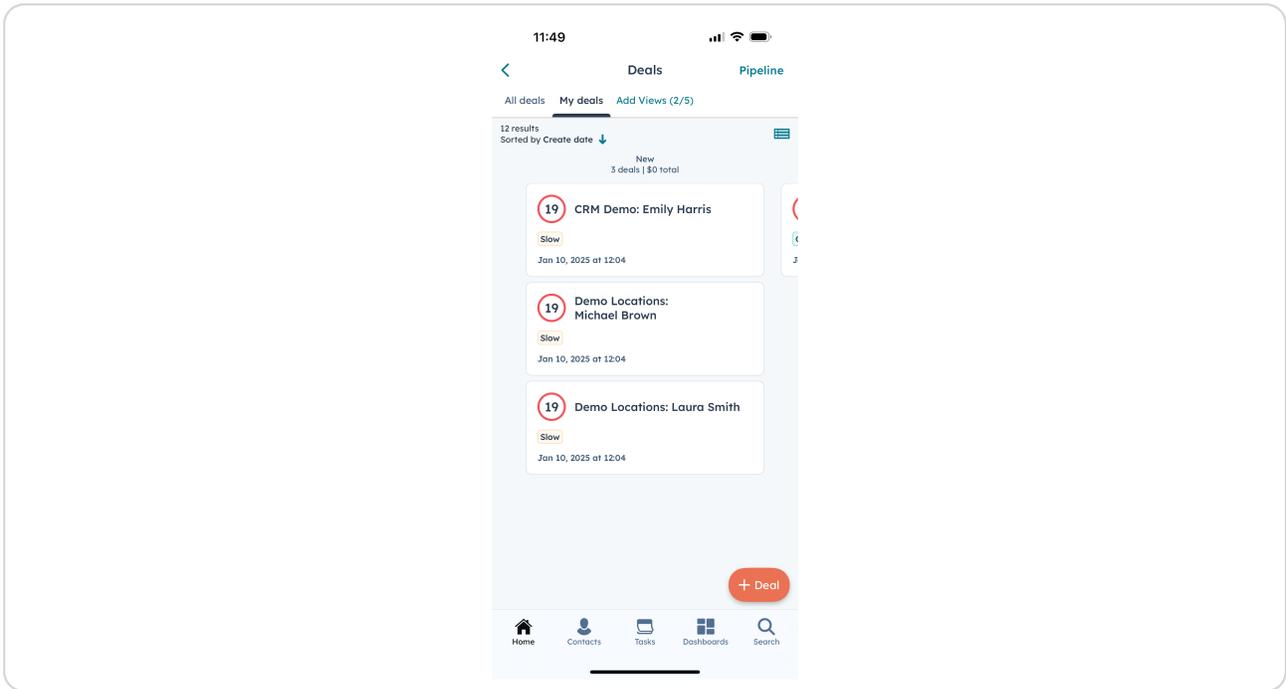
STEP 5

Click Done



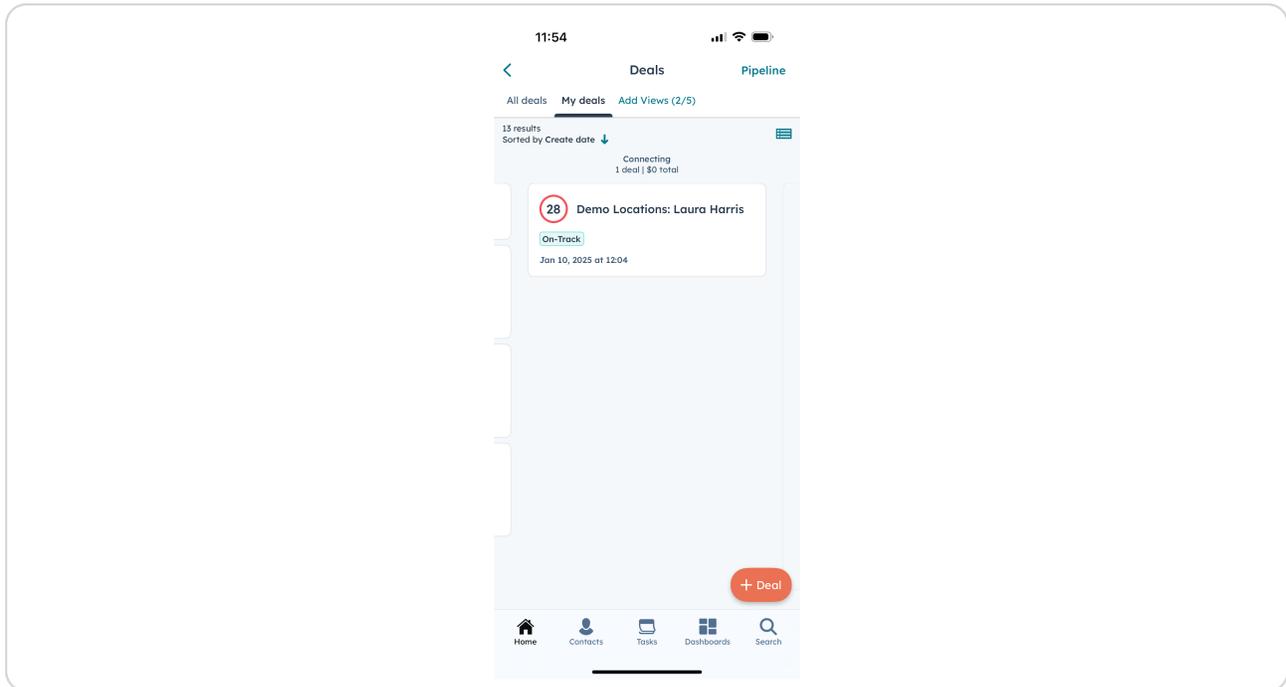
STEP 6

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



STEP 7

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

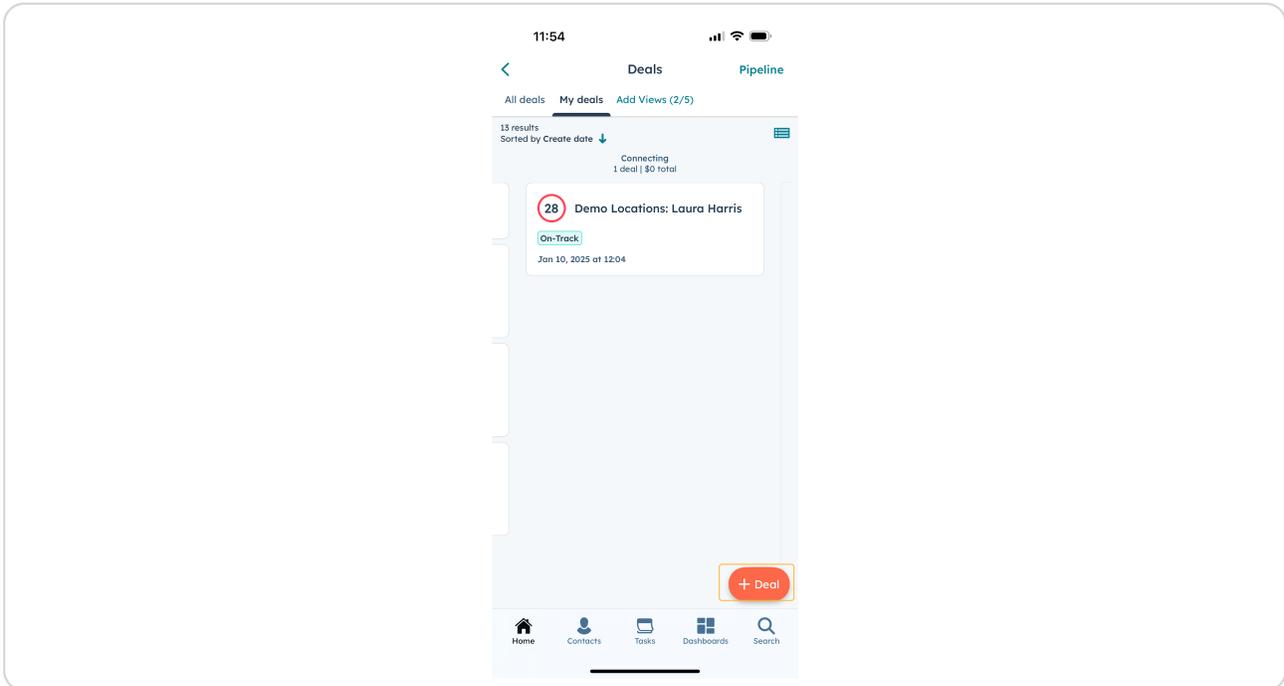


Adding Deals

8 Steps

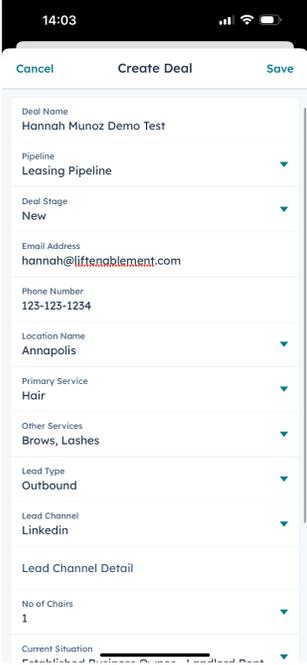
STEP 8

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



STEP 9

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.



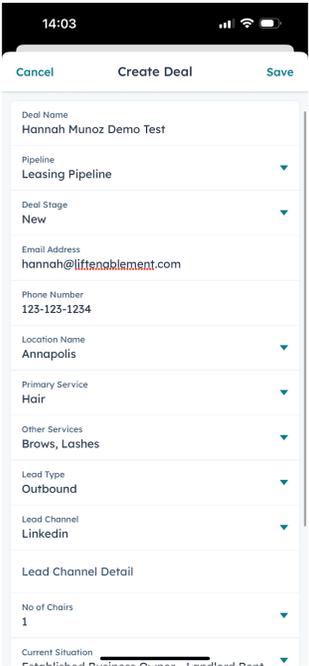
The screenshot shows a mobile application interface for creating a deal. At the top, there is a status bar with the time 14:03 and signal, Wi-Fi, and battery icons. Below the status bar is a navigation bar with three buttons: 'Cancel', 'Create Deal', and 'Save'. The main content area is a scrollable list of form fields, each with a label and a value, and a dropdown arrow on the right side of each field. The fields are: Deal Name (Hannah Munoz Demo Test), Pipeline (Leasing Pipeline), Deal Stage (New), Email Address (hannah@liftenablement.com), Phone Number (123-123-1234), Location Name (Annapolis), Primary Service (Hair), Other Services (Brows, Lashes), Lead Type (Outbound), Lead Channel (Linkedin), Lead Channel Detail (empty), No of Chairs (1), and Current Situation (Established Business Owner - Lead/Deal Test).

Field Label	Value
Deal Name	Hannah Munoz Demo Test
Pipeline	Leasing Pipeline
Deal Stage	New
Email Address	hannah@liftenablement.com
Phone Number	123-123-1234
Location Name	Annapolis
Primary Service	Hair
Other Services	Brows, Lashes
Lead Type	Outbound
Lead Channel	Linkedin
Lead Channel Detail	
No of Chairs	1
Current Situation	Established Business Owner - Lead/Deal Test

STEP 10

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.

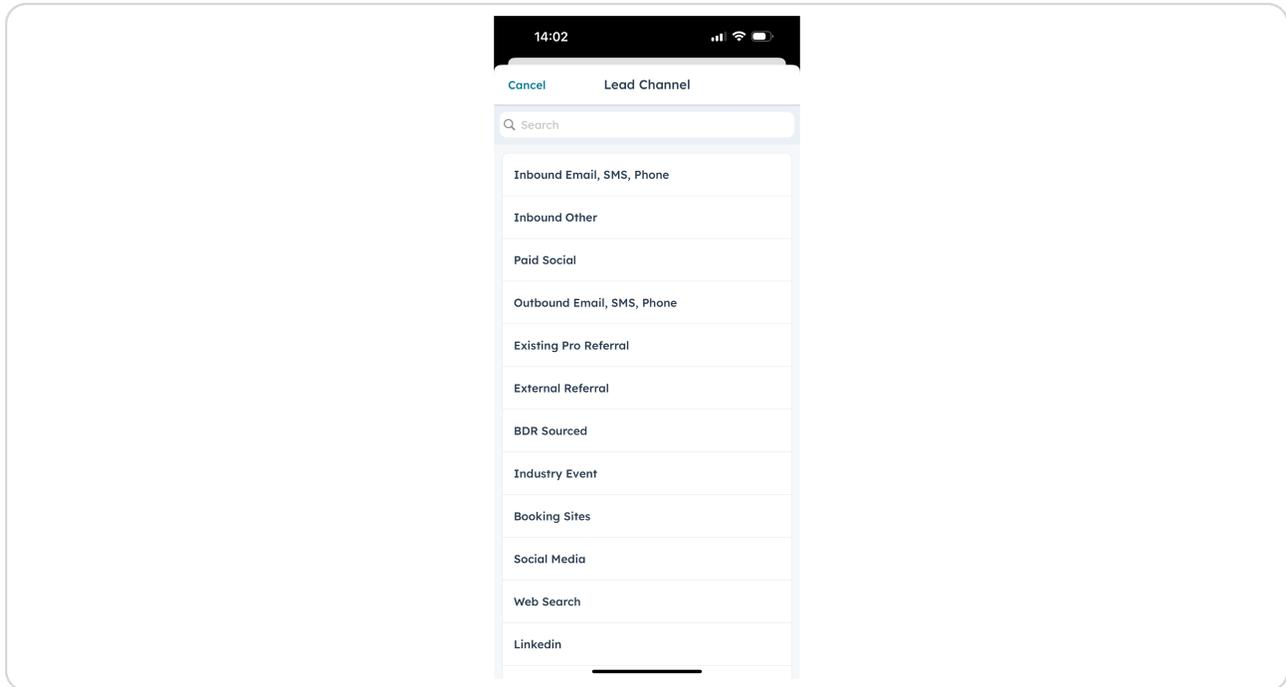


The screenshot shows a mobile application interface for creating a deal. The top bar displays the time 14:03 and signal strength. Below the bar are three buttons: "Cancel", "Create Deal", and "Save". The main form contains the following fields:

- Deal Name: Hannah Munoz Demo Test
- Pipeline: Leasing Pipeline
- Deal Stage: New
- Email Address: hannah@lifenoblement.com
- Phone Number: 125-125-1254
- Location Name: Annapolis
- Primary Service: Hair
- Other Services: Brows, Lashes
- Lead Type: Outbound
- Lead Channel: LinkedIn
- Lead Channel Detail: (empty)
- No of Chairs: 1
- Current Situation: (empty)

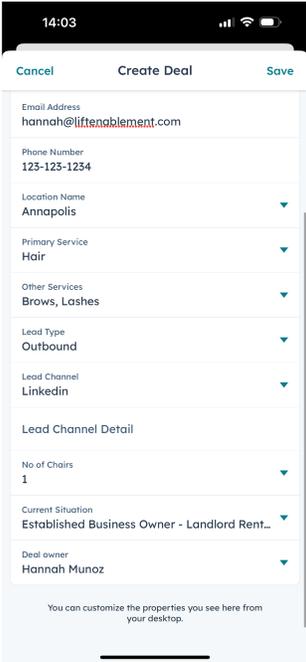
STEP 11

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.



STEP 12

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



The screenshot shows a mobile application interface for creating a deal. At the top, there is a status bar with the time 14:03 and signal, Wi-Fi, and battery icons. Below the status bar is a navigation bar with three options: 'Cancel', 'Create Deal', and 'Save'. The main content area is a form with several fields, each with a dropdown arrow on the right side:

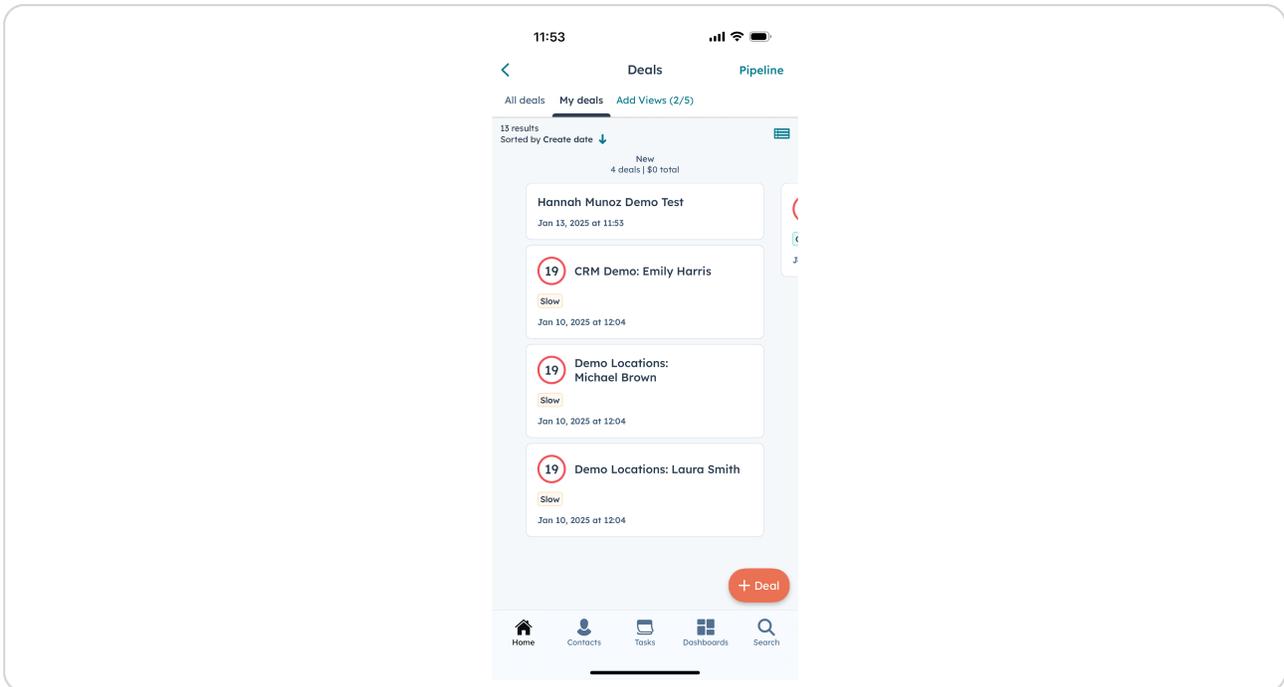
- Email Address: hannah@liftenablement.com
- Phone Number: 123-123-1234
- Location Name: Annapolis
- Primary Service: Hair
- Other Services: Brows, Lashes
- Lead Type: Outbound
- Lead Channel: LinkedIn
- Lead Channel Detail: (empty field)
- No of Chairs: 1
- Current Situation: Established Business Owner - Landlord Rent...
- Deal owner: Hannah Munoz

At the bottom of the form, there is a note: "You can customize the properties you see here from your desktop."

STEP 13

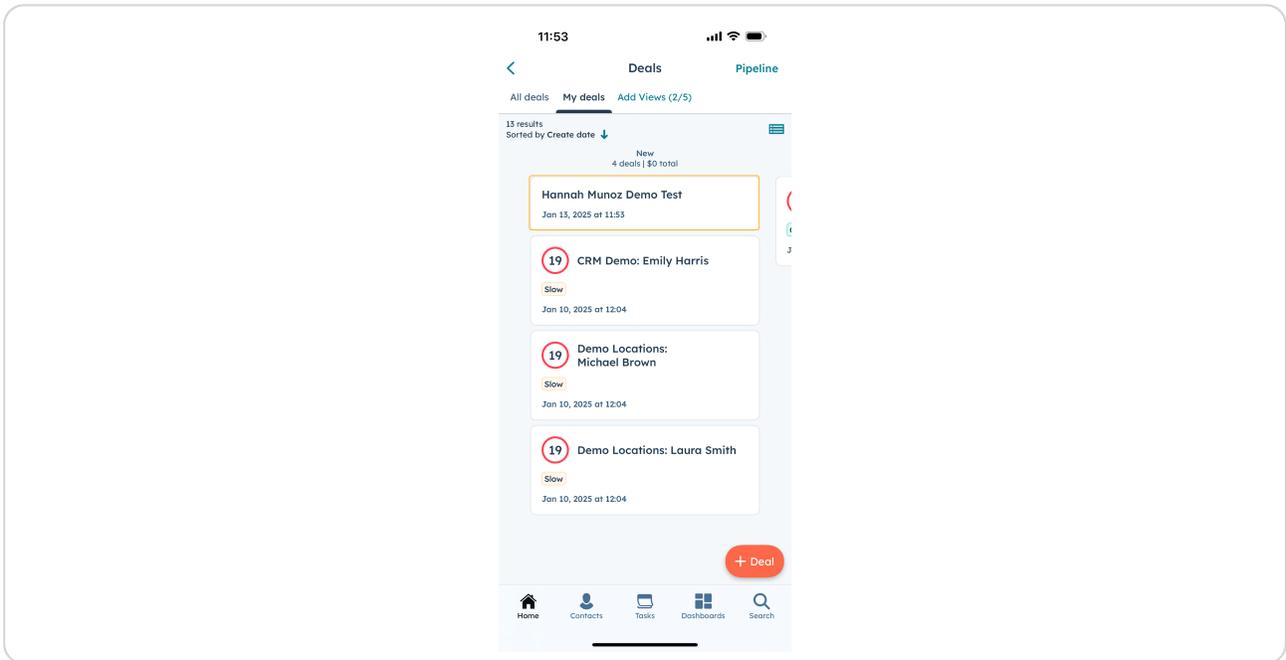
A new Deal will be Created

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.



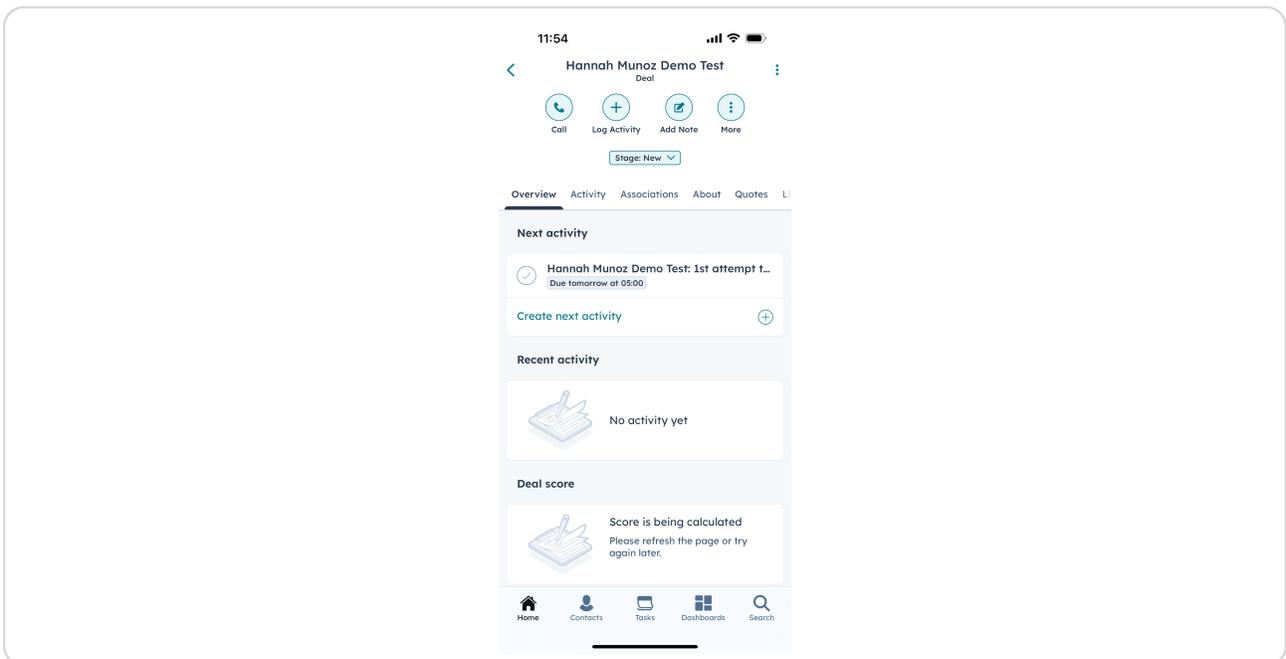
STEP 14

Click the New Deal



STEP 15

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



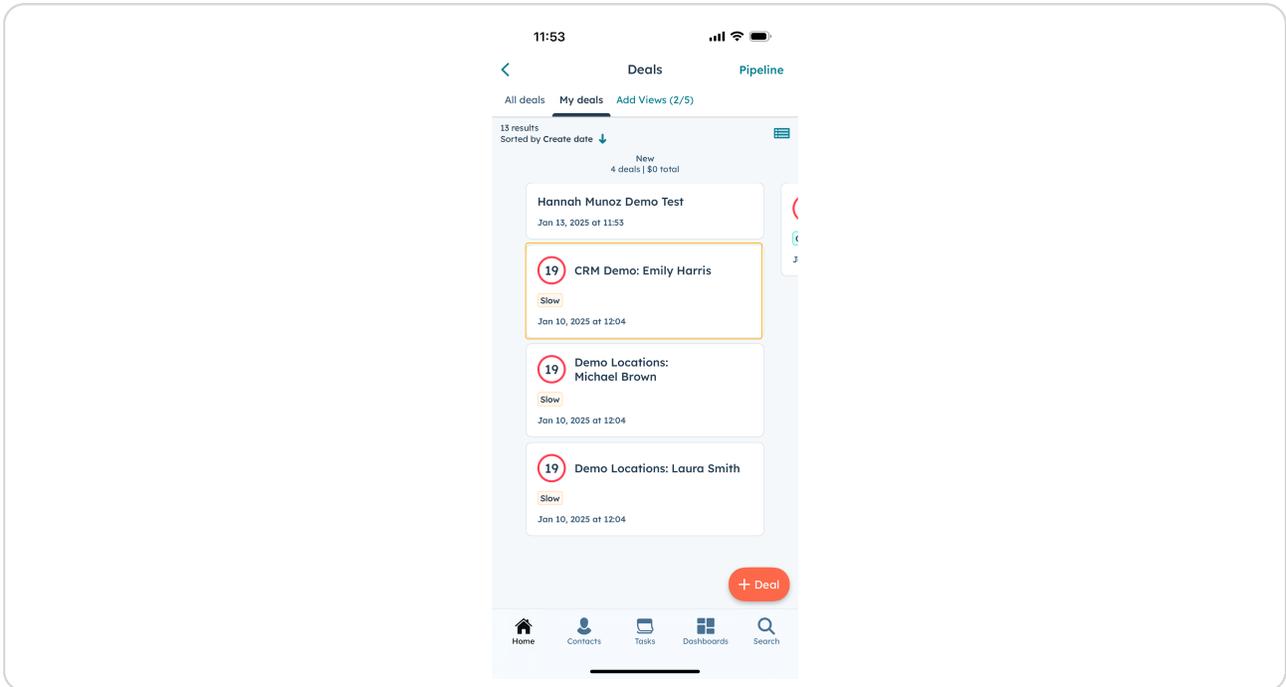
Updating Deals

28 Steps

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.

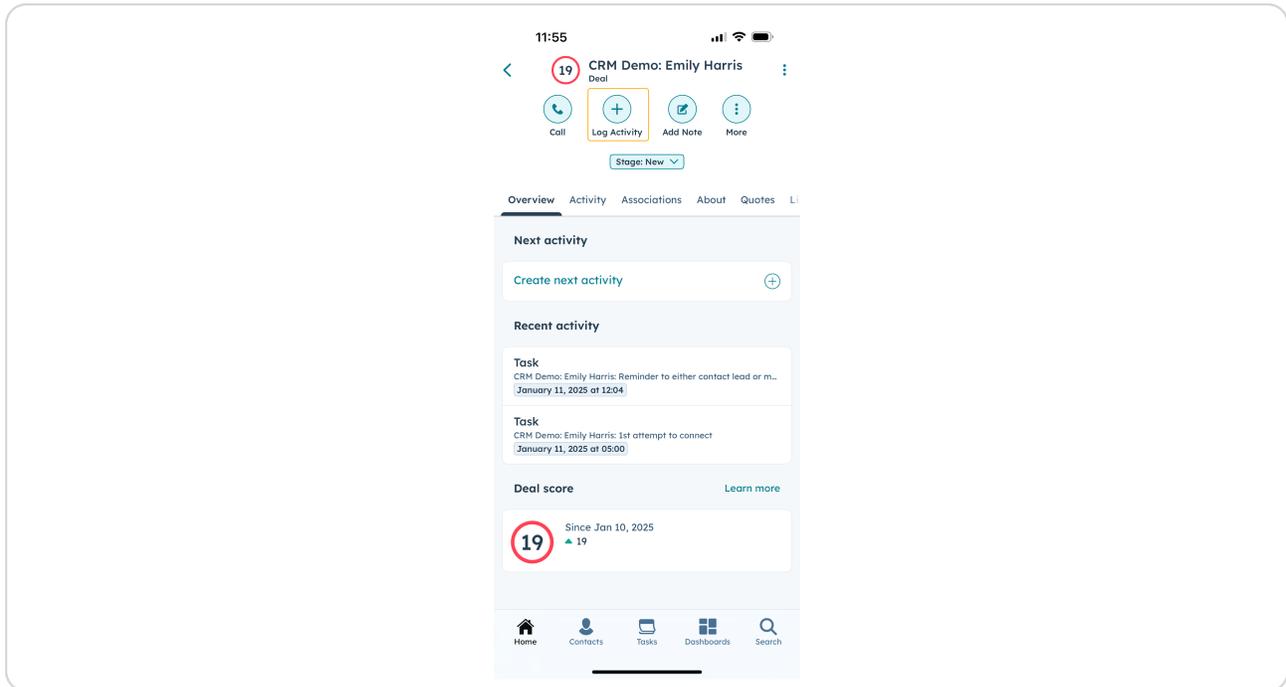
STEP 16

Click on the Deal you want to work on



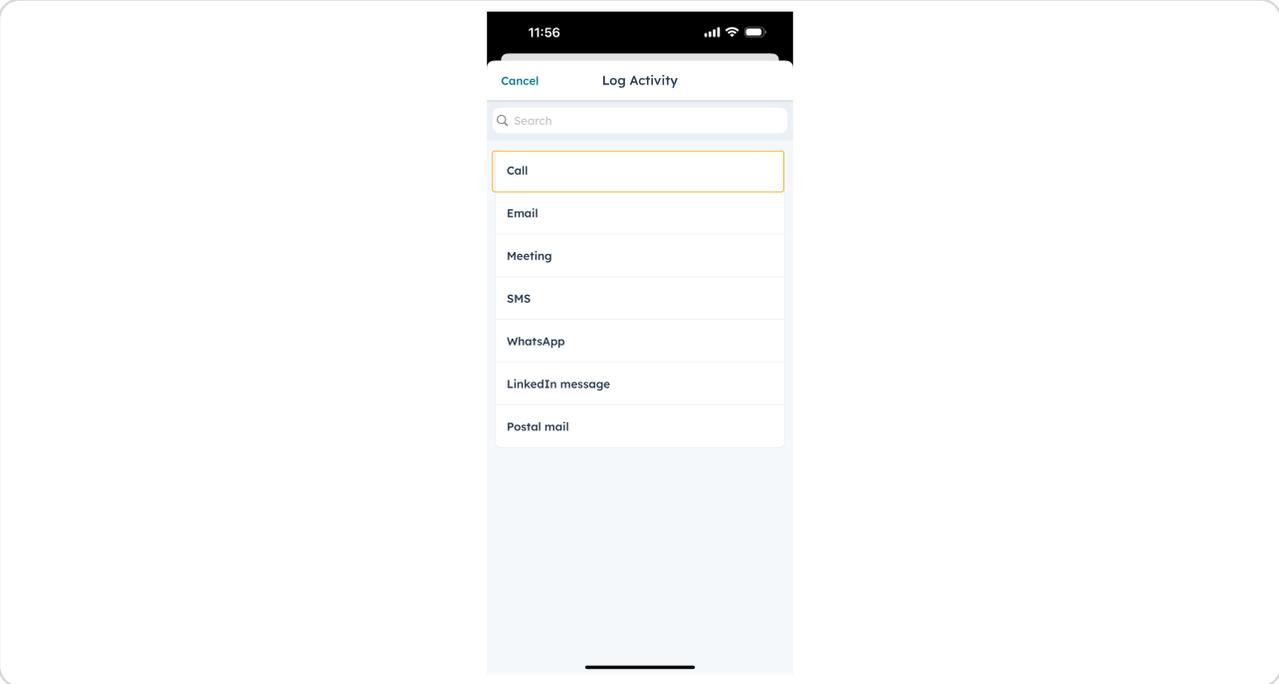
STEP 17

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



STEP 18

Click Call

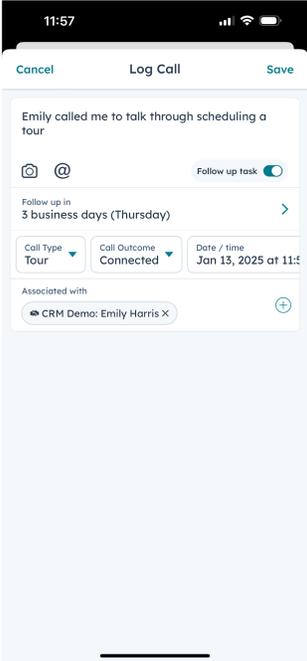


STEP 19

Update the Call Log

Include:

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

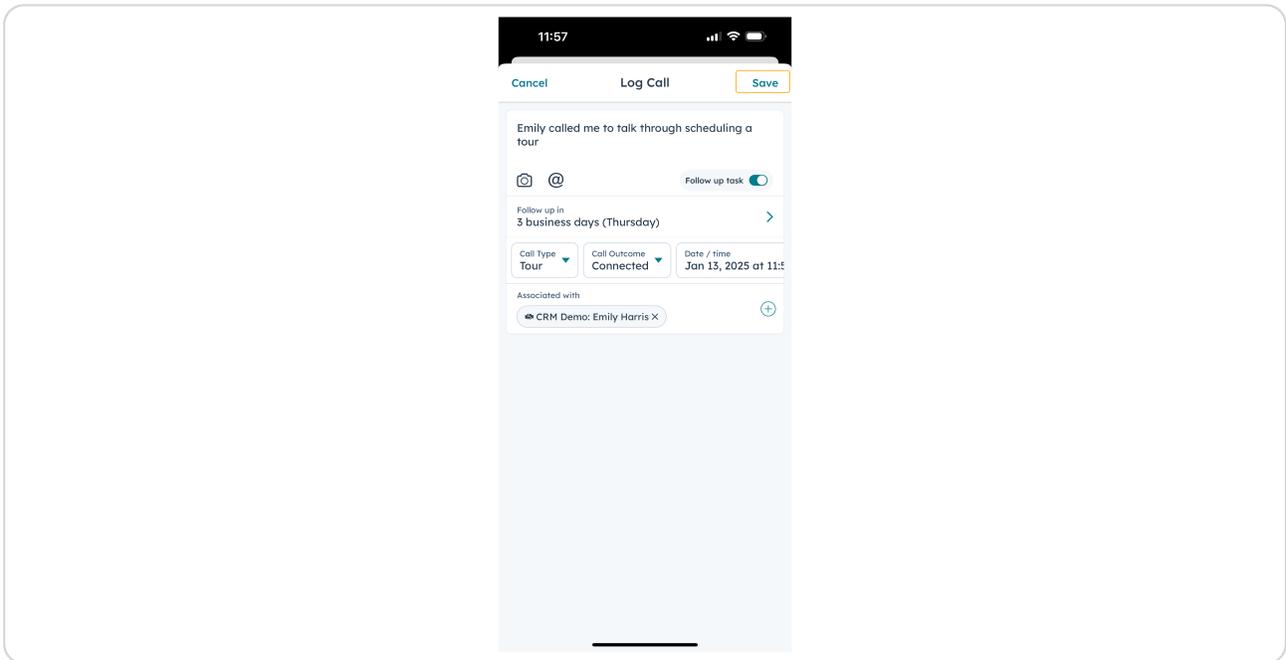


The screenshot shows a mobile application interface for logging a call. At the top, the status bar displays the time 11:57 and signal strength. Below the status bar, there are three buttons: 'Cancel', 'Log Call', and 'Save'. The main content area contains the following information:

- Text: "Emily called me to talk through scheduling a tour"
- Icons: A camera icon and an '@' symbol.
- Toggle: "Follow up task" with a toggle switch turned on.
- Text: "Follow up in 3 business days (Thursday)" with a right-pointing arrow.
- Fields: Three dropdown menus for "Call Type" (set to "Tour"), "Call Outcome" (set to "Connected"), and "Date / time" (set to "Jan 13, 2025 at 11:5").
- Section: "Associated with" containing a tag "CRM Demo: Emily Harris X" with a close button (X) and a plus sign (+).

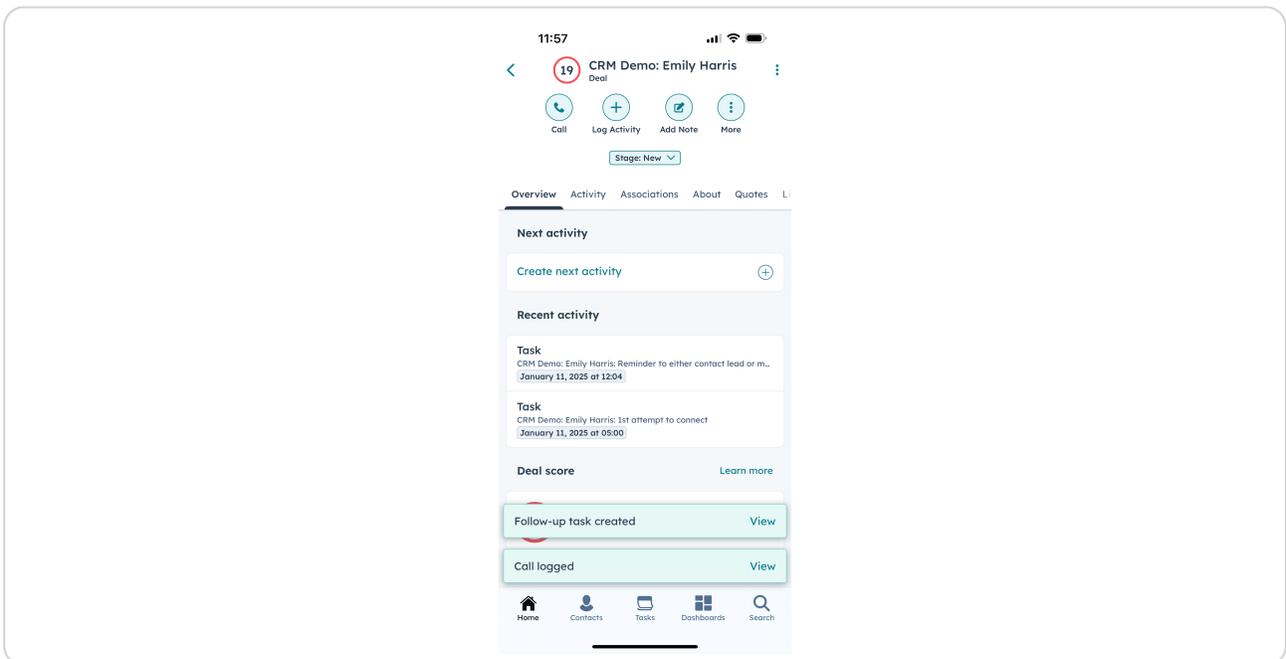
STEP 20

Click Save



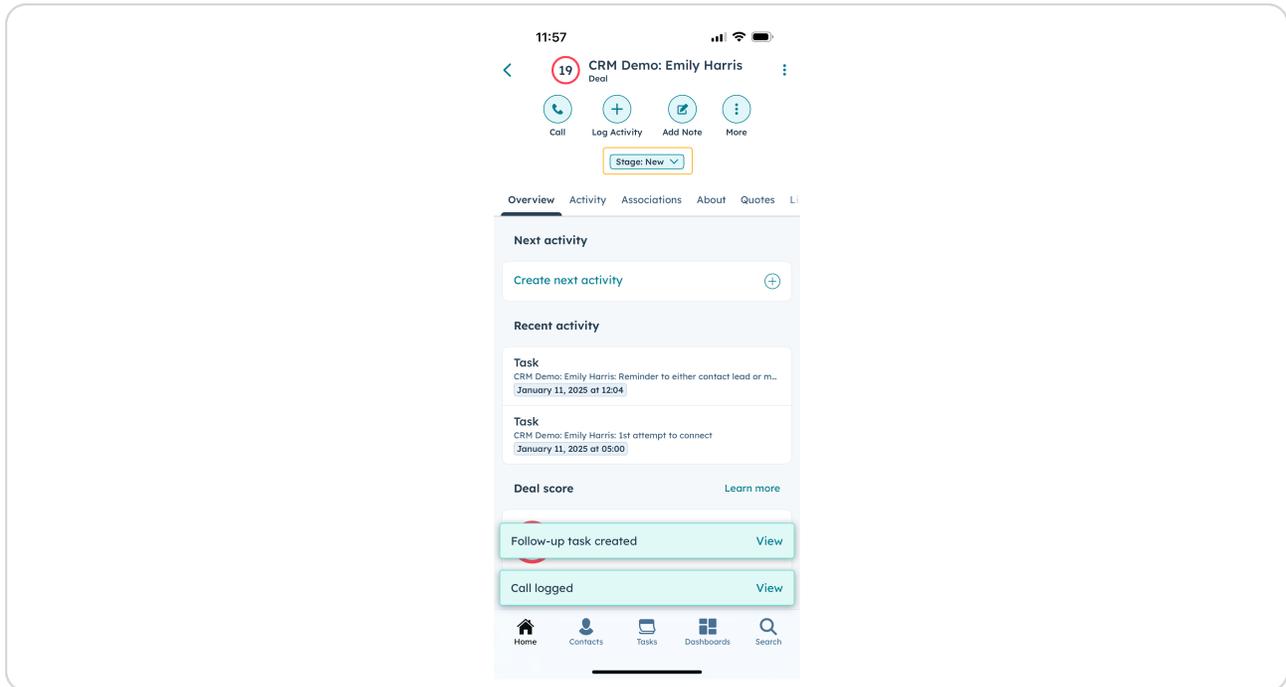
STEP 21

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



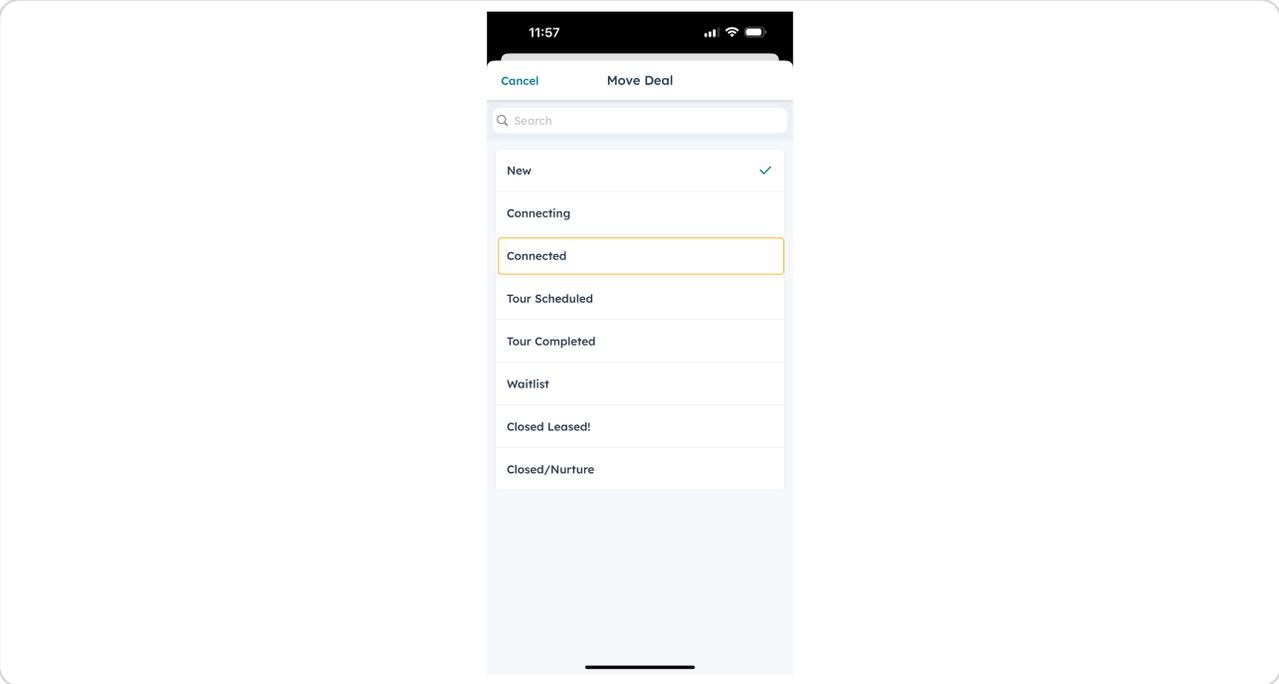
STEP 22

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



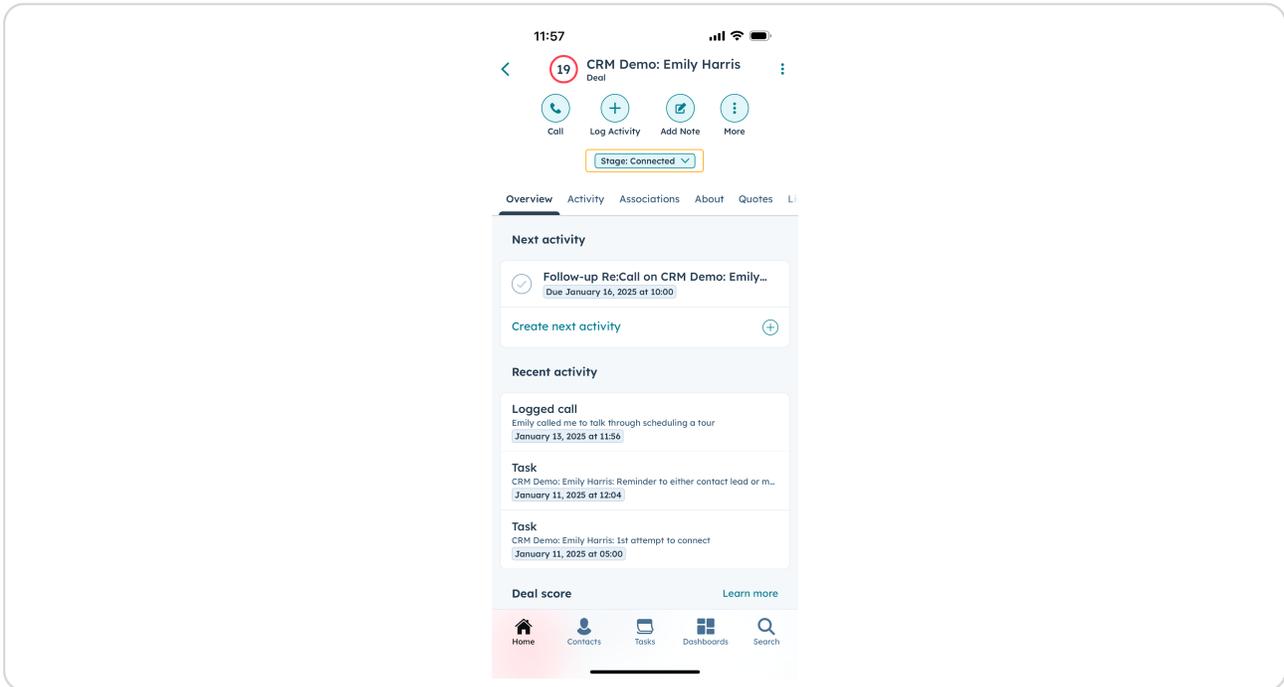
STEP 23

Select the updated stage



STEP 24

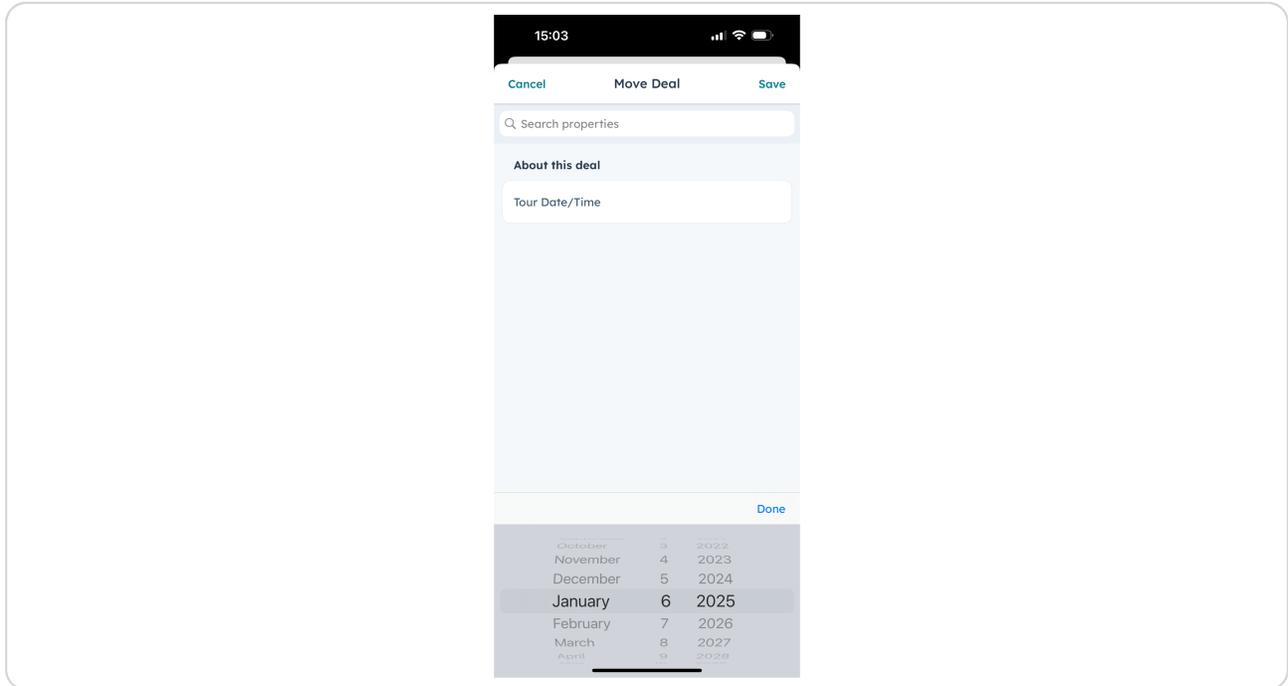
The Deal will automatically move into the updated stage



STEP 25

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

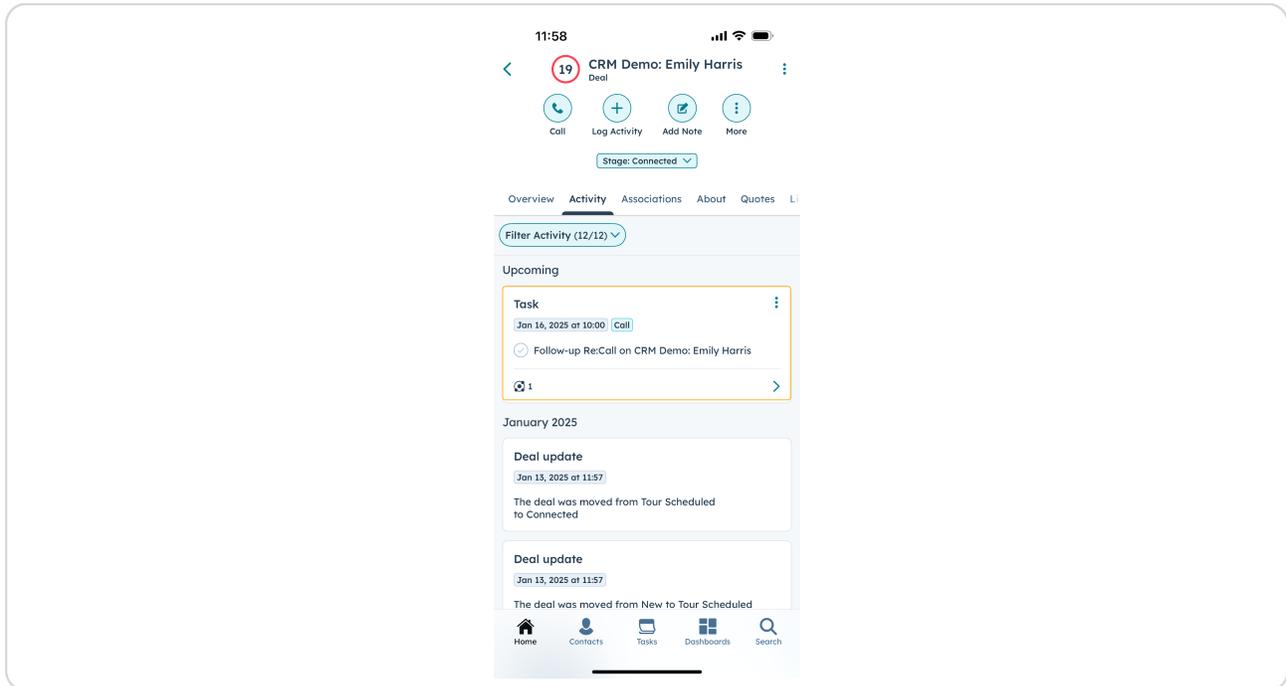
For example: If you move a Deal into Tour Scheduled, HubSpot will prompt you to update information about when the tour is scheduled for.



STEP 26

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

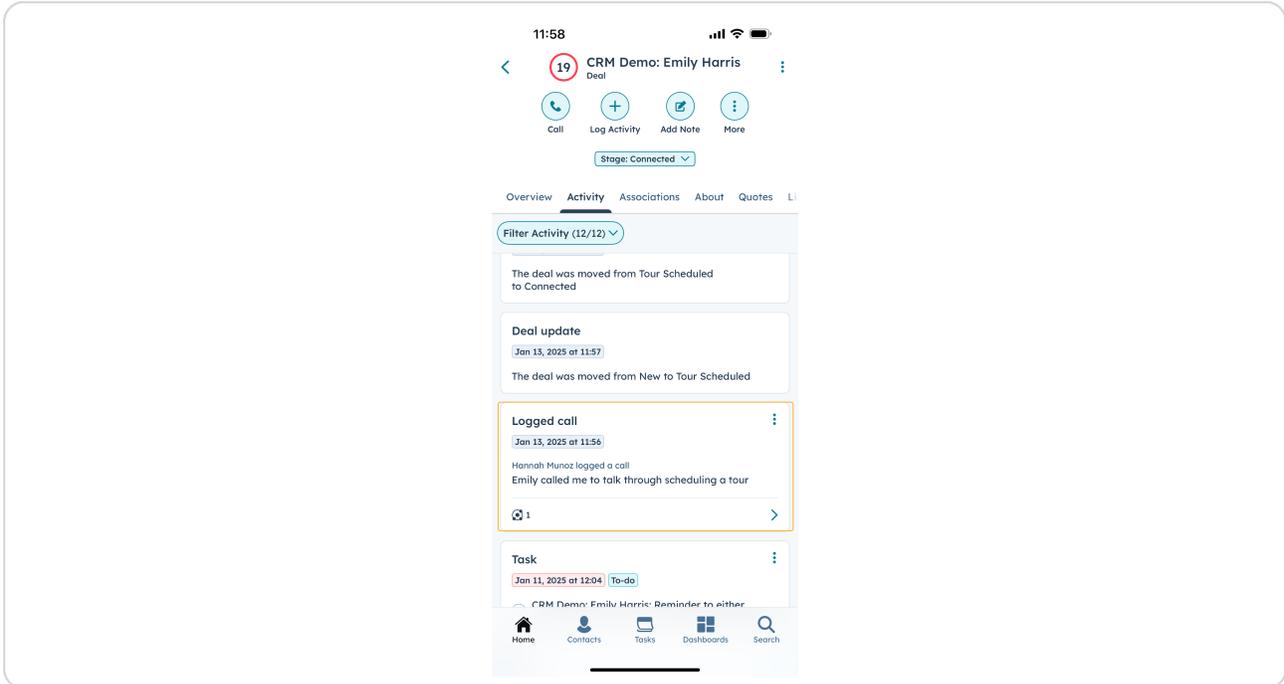
Here you will see the Deal updates as well as the Task created from the Logged call.



STEP 27

Scroll down to see more updates on the Deal

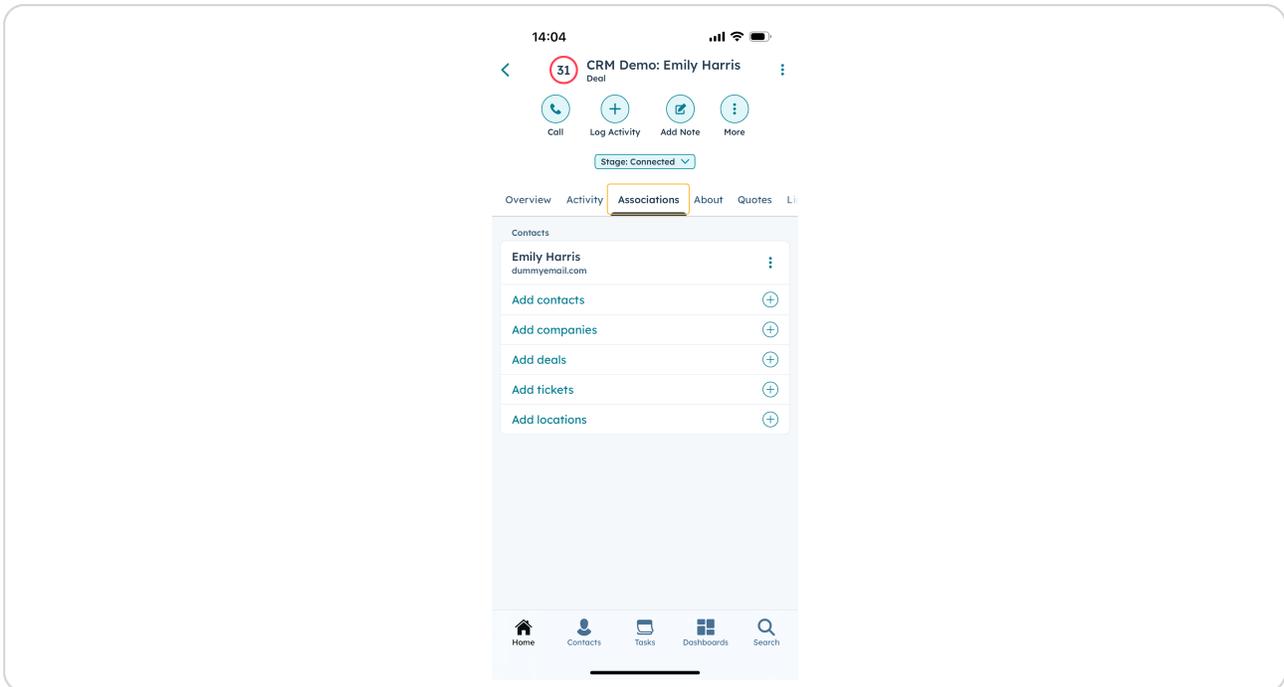
In this case we can scroll to see the Logged call.



STEP 28

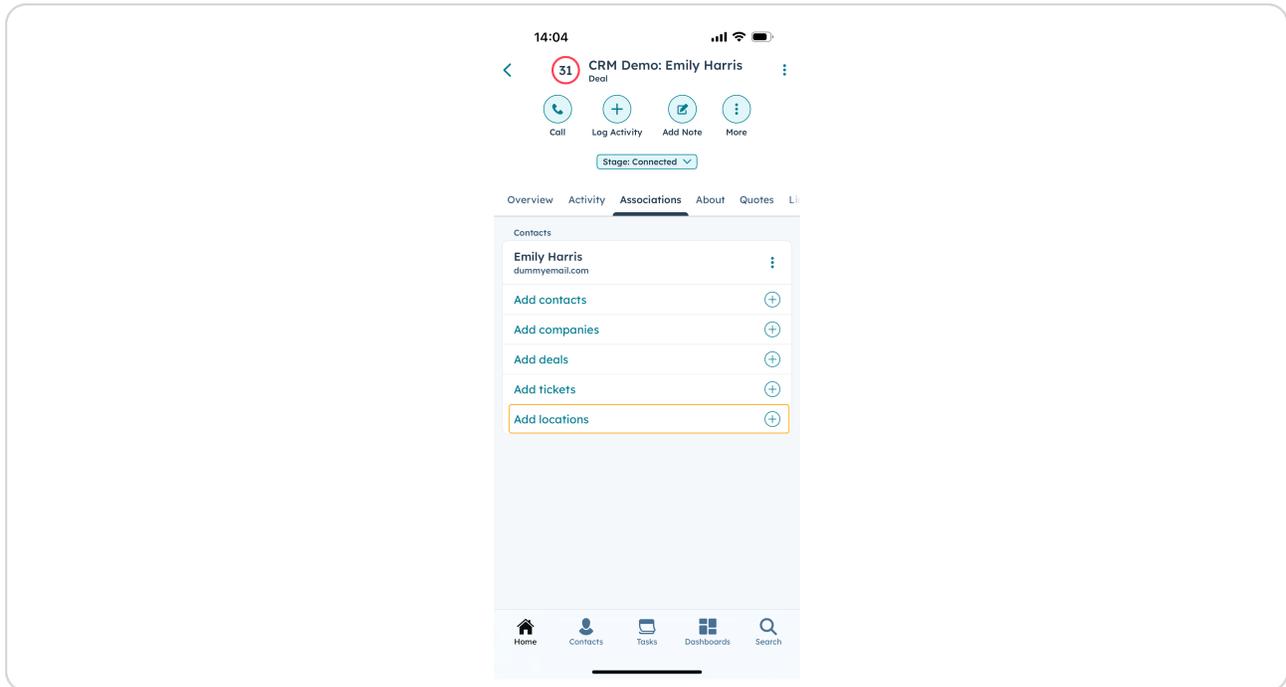
Click on Associations

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.



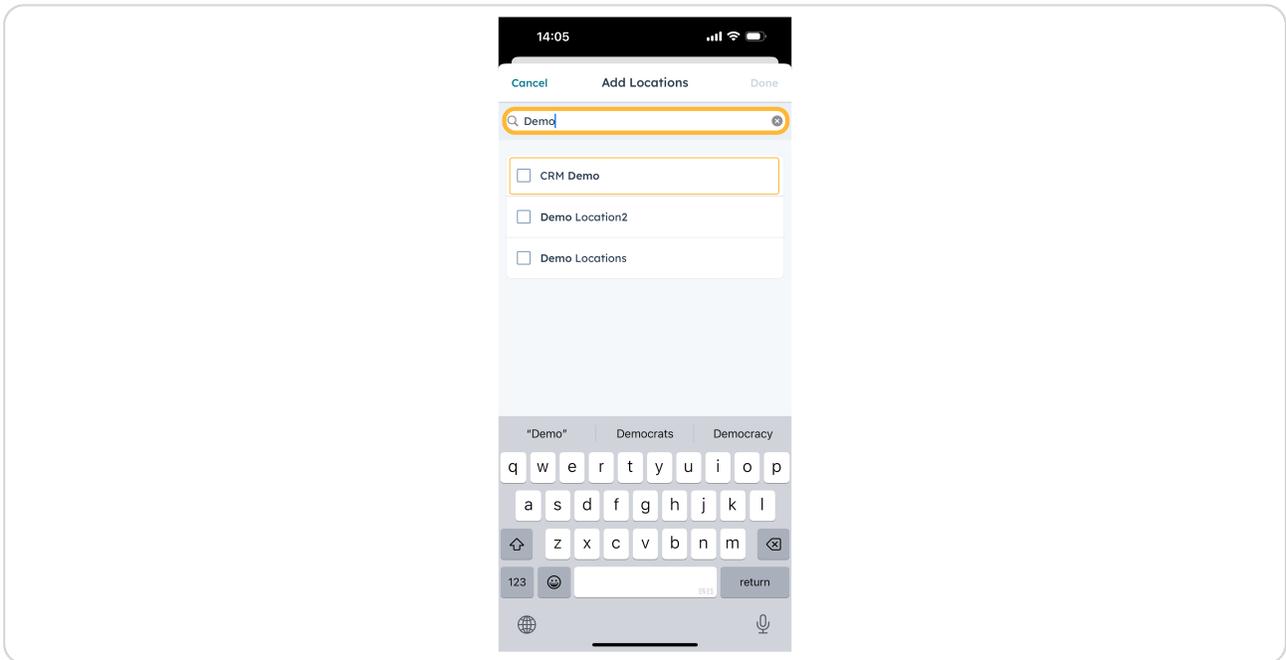
STEP 29

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



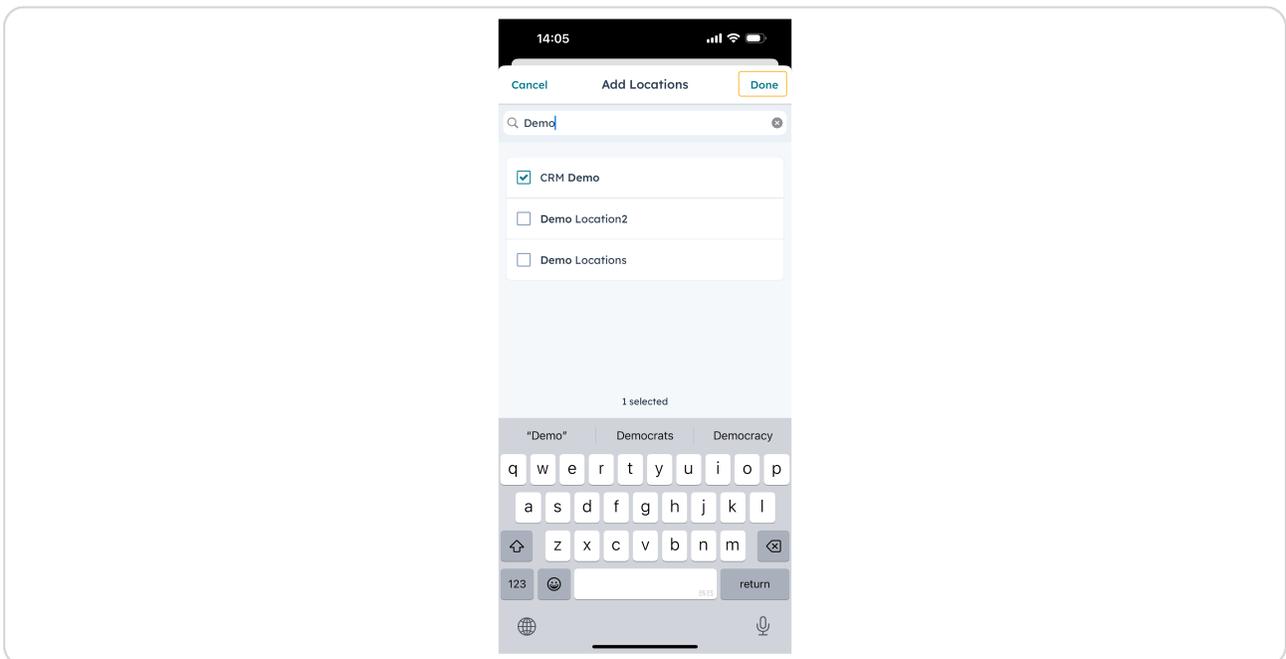
STEP 30

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



STEP 31

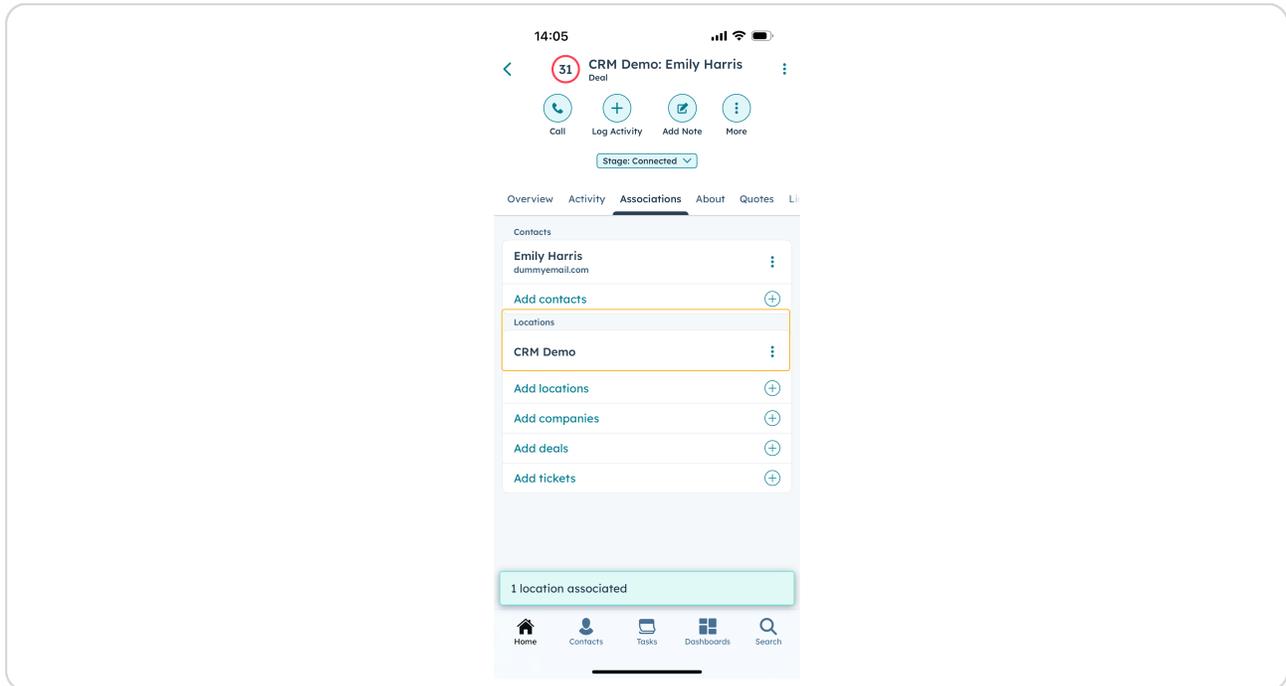
Click Done



STEP 32

The Location will be added

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



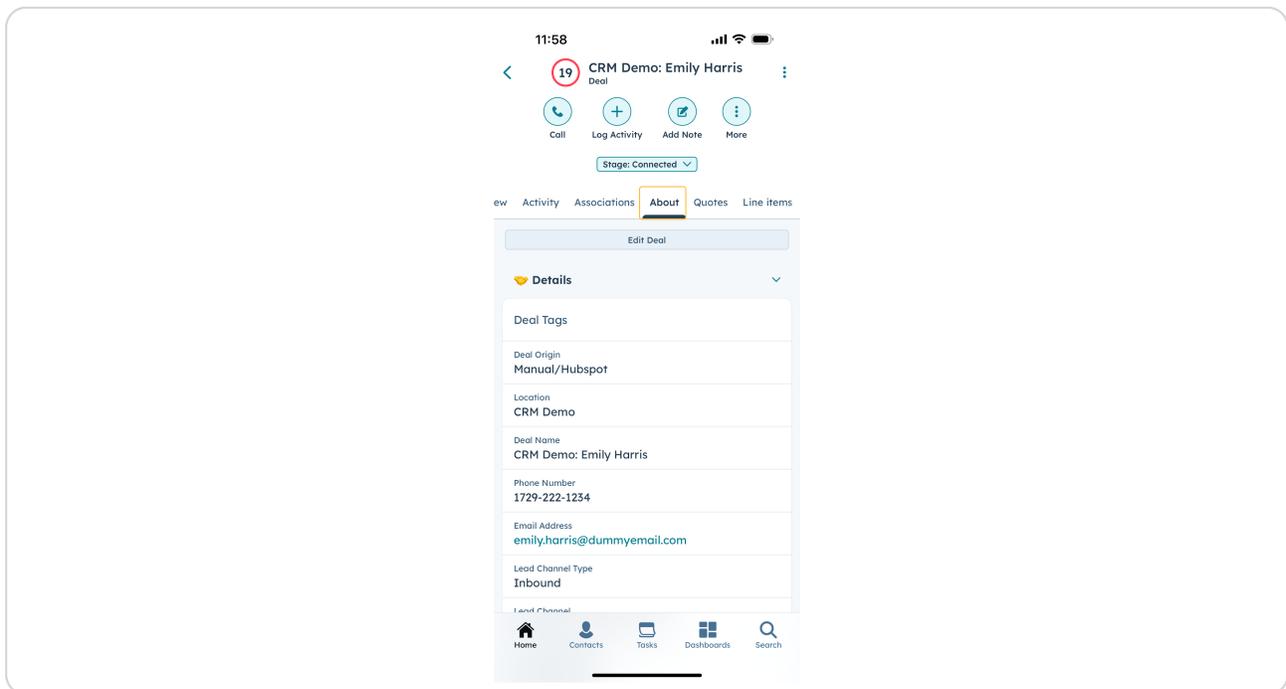
STEP 33

Access all information about the Deal on the About tab

Here you will see information on:

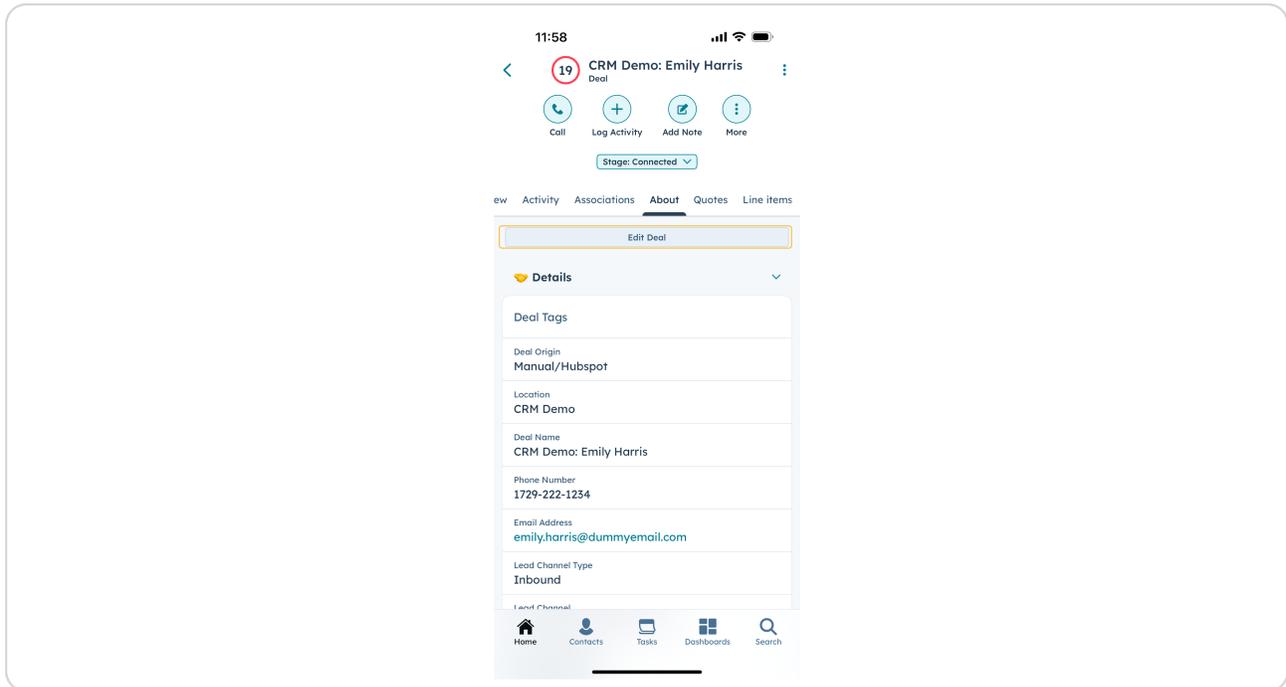
- Deal Details
- Tour Info
- Deal Discovery
- Lead Source
- Campaign Info
- Closing Details

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



STEP 34

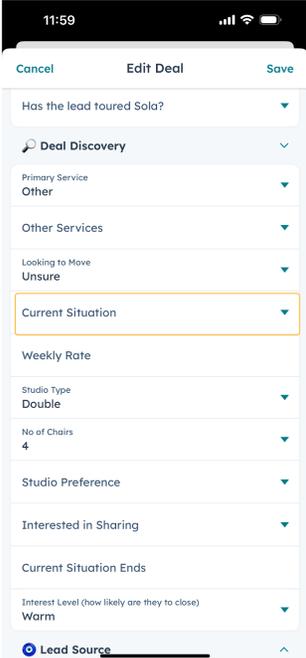
If you need to add missing information or update existing information, Click Edit Deal at the top of the About tab



STEP 35

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

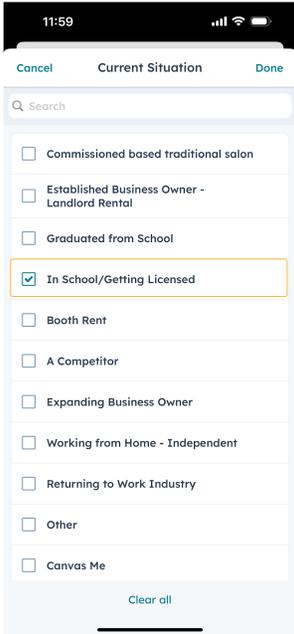
For this example, the Current Situation needed to be filled in.



The screenshot shows a mobile application interface for editing a deal. At the top, there is a status bar with the time 11:59 and signal, Wi-Fi, and battery icons. Below the status bar, there are three buttons: "Cancel", "Edit Deal", and "Save". The main content area is a list of fields, each with a dropdown arrow on the right. The fields are: "Has the lead toured Sold?", "Deal Discovery", "Primary Service" (with "Other" selected), "Other Services", "Looking to Move" (with "Unsure" selected), "Current Situation" (highlighted with an orange border), "Weekly Rate", "Studio Type" (with "Double" selected), "No of Chairs" (with "4" selected), "Studio Preference", "Interested in Sharing", "Current Situation Ends", "Interest Level (how likely are they to close)" (with "Warm" selected), and "Lead Source" (with a blue circle icon and an upward arrow). The "Current Situation" field is the focus of the step.

STEP 36

Click on a drop down item or fill in the information



11:59

Cancel Current Situation Done

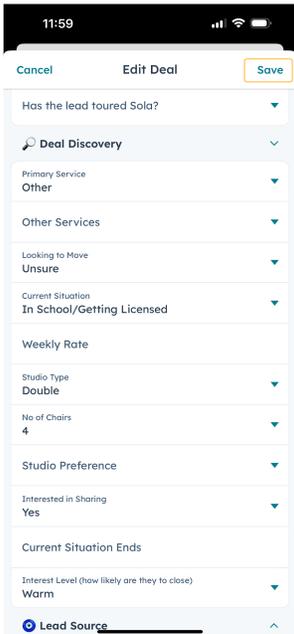
Search

- Commissioned based traditional salon
- Established Business Owner - Landlord Rental
- Graduated from School
- In School/Getting Licensed
- Booth Rent
- A Competitor
- Expanding Business Owner
- Working from Home - Independent
- Returning to Work Industry
- Other
- Canvas Me

Clear all

STEP 37

Click Save



11:59

Cancel Edit Deal Save

Has the lead toured Sola?

Deal Discovery

Primary Service
Other

Other Services

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

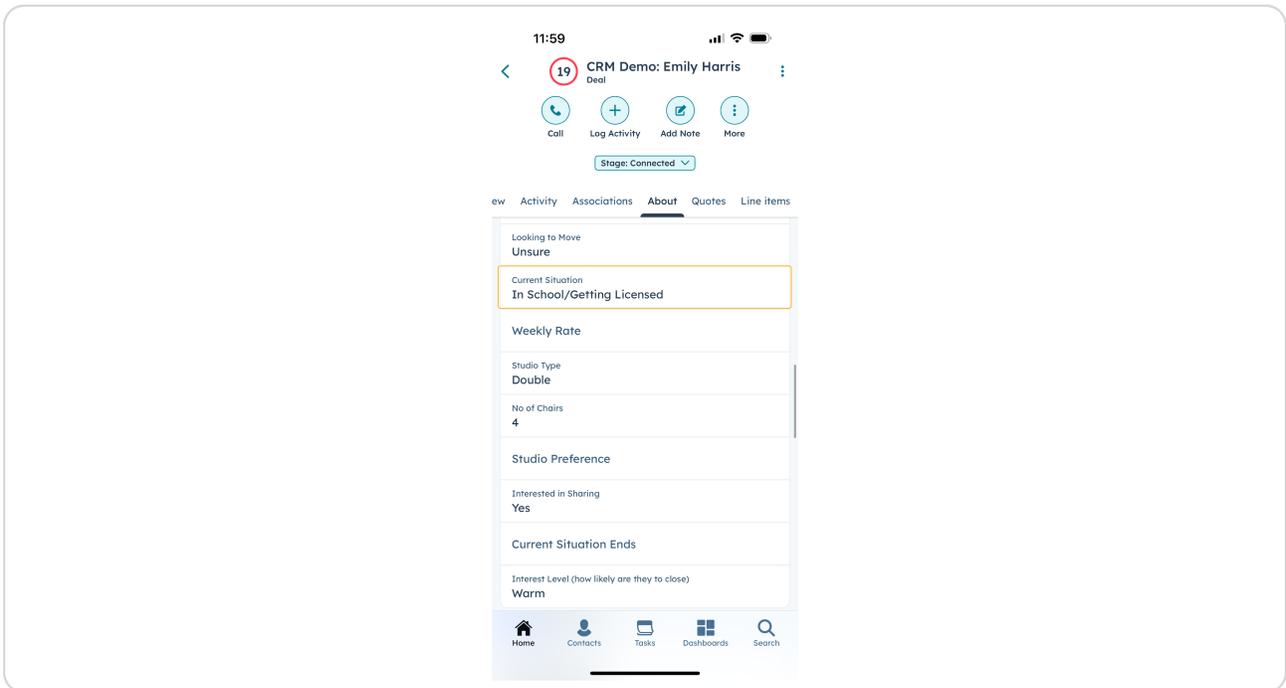
Current Situation Ends

Interest Level (how likely are they to close)
Warm

Lead Source

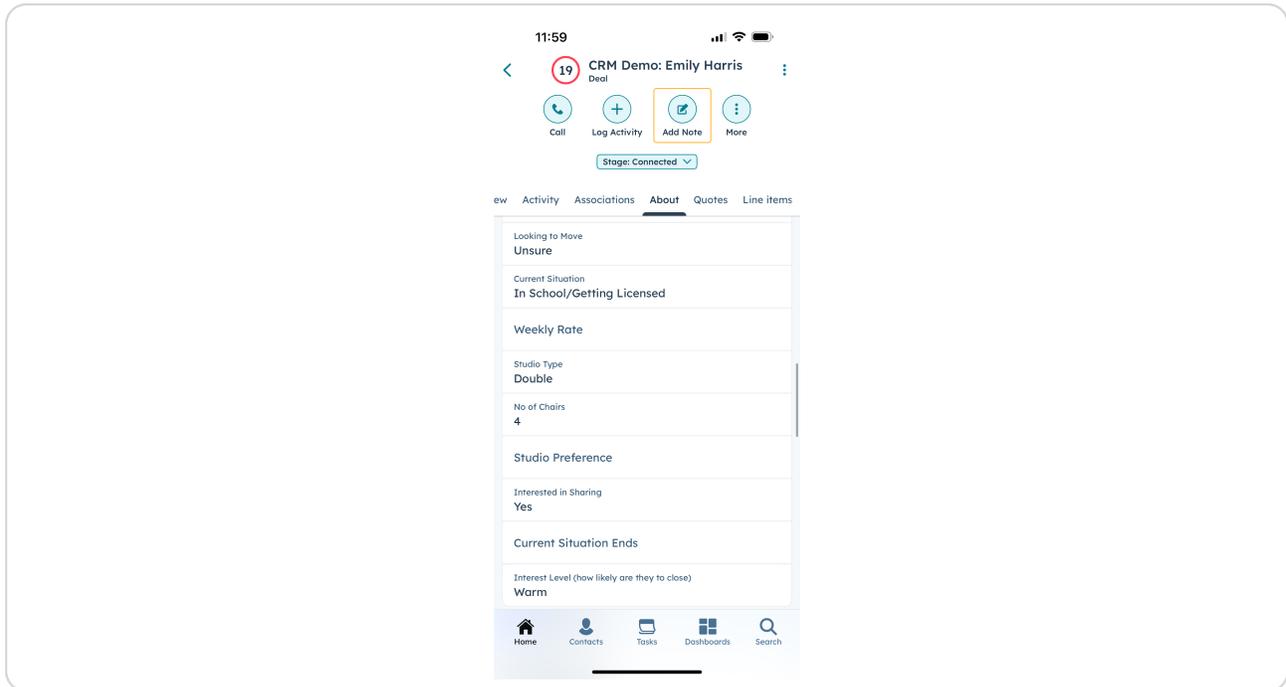
STEP 38

The Deal will be updated



STEP 39

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



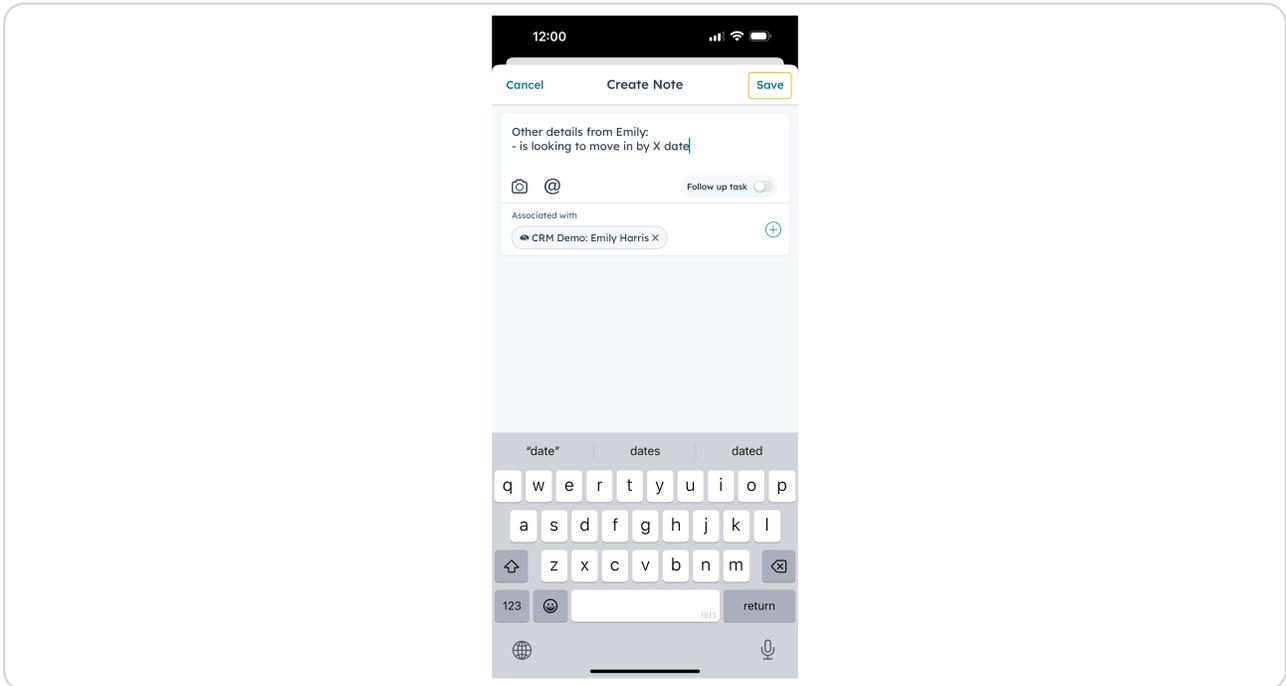
STEP 40

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.

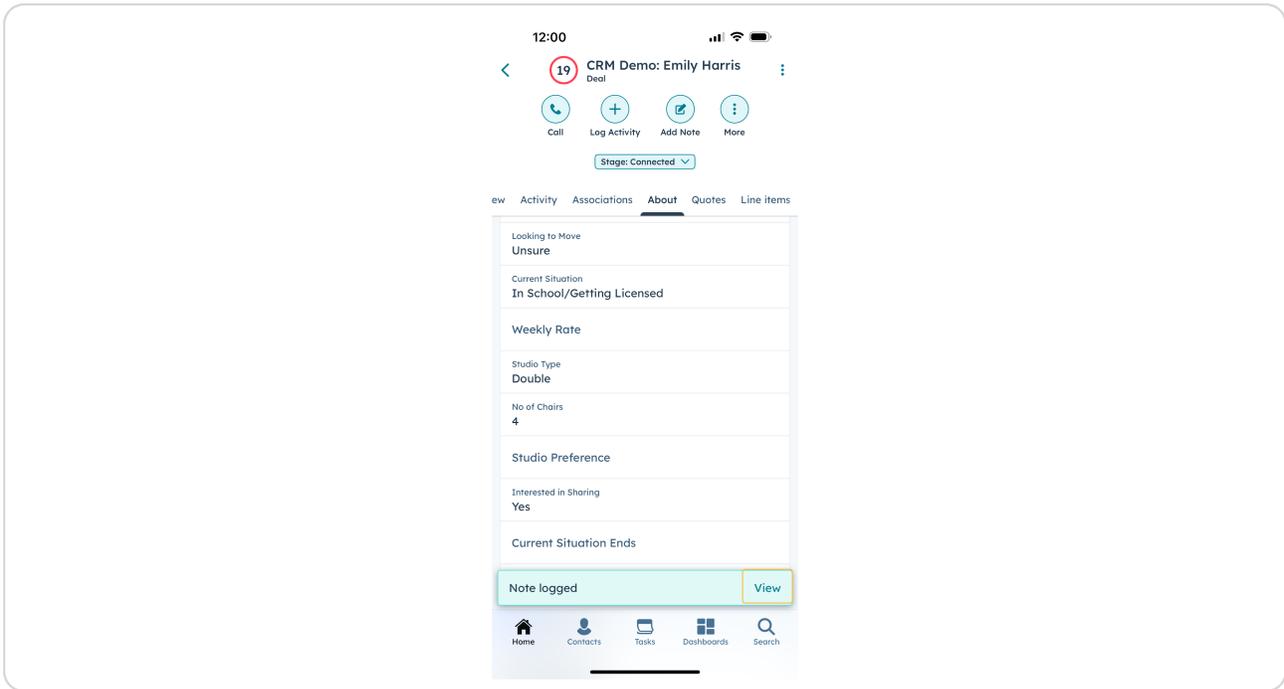
STEP 41

Click Save



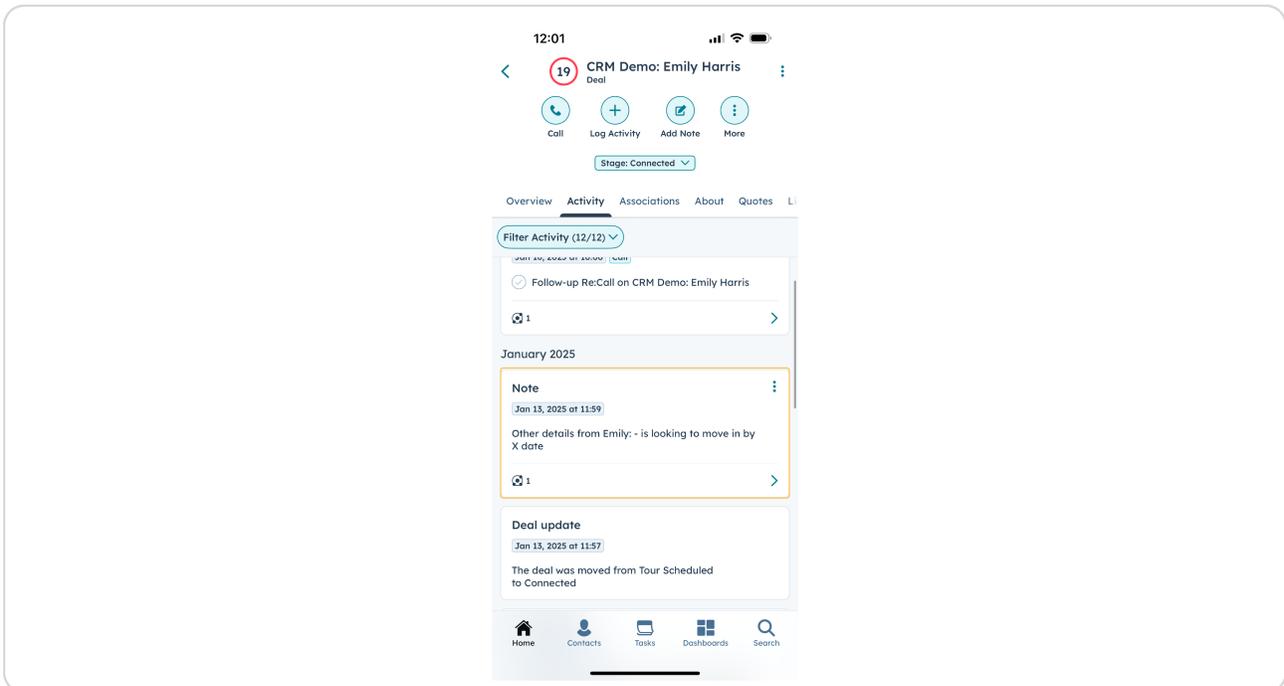
STEP 42

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



STEP 43

You'll be taken to the Note in the Activity timeline

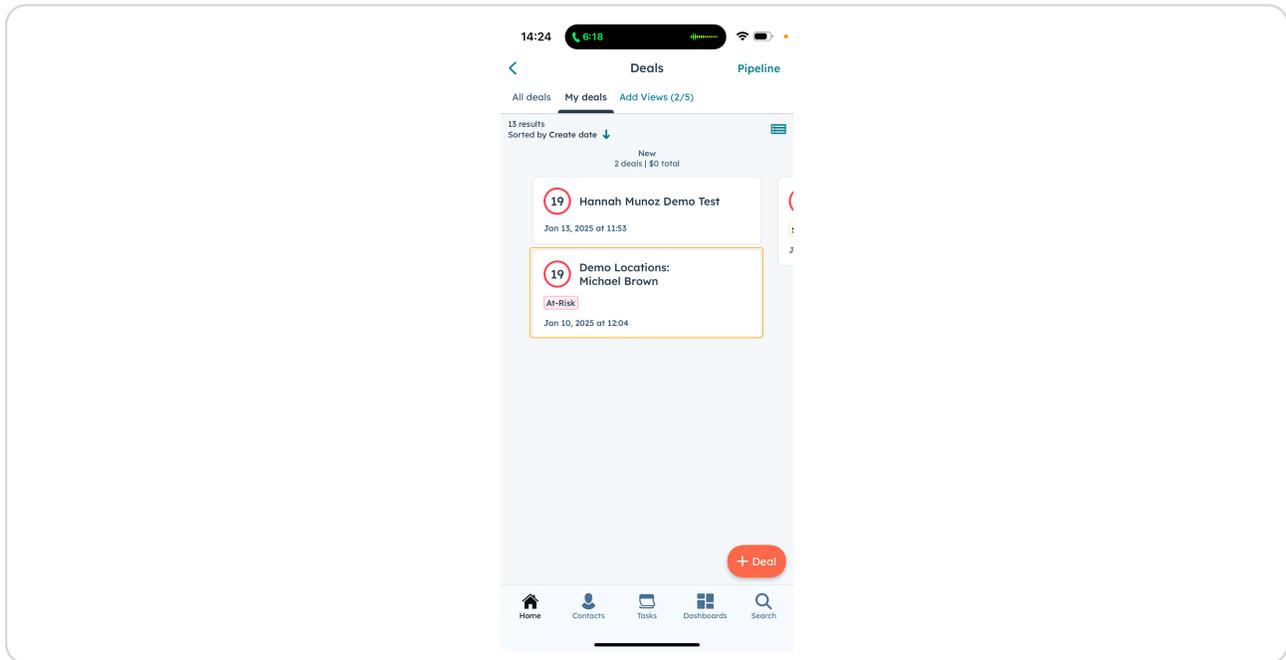


Scheduling a Tour

15 Steps

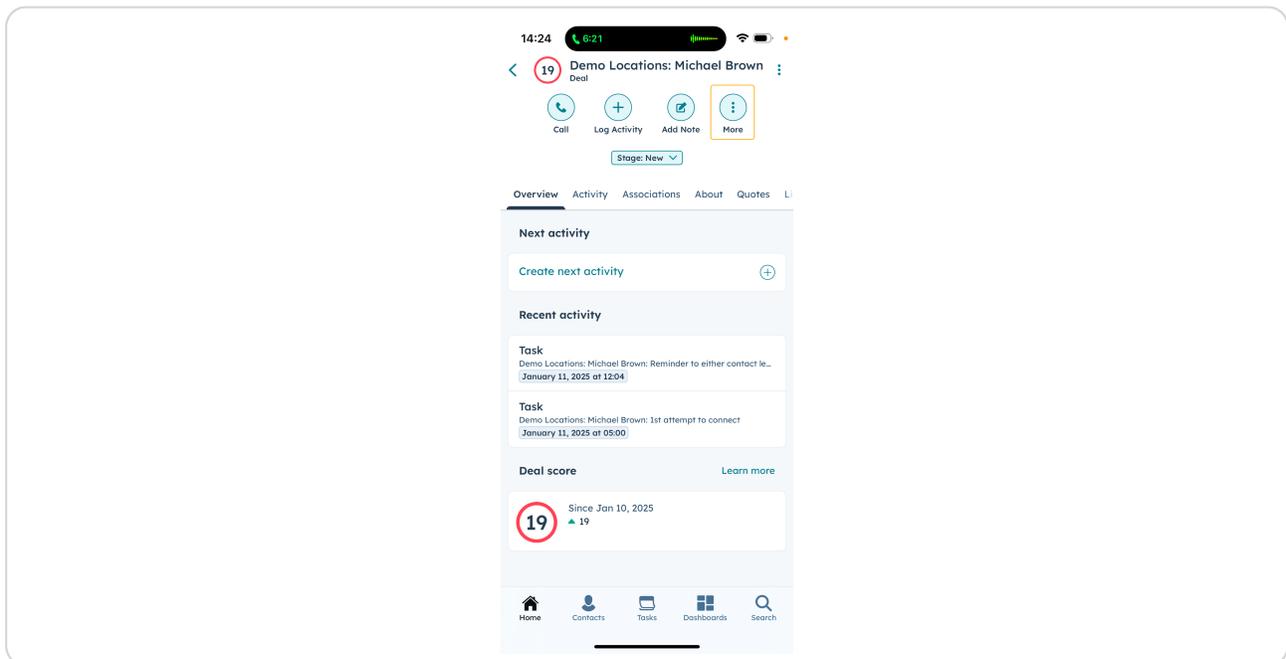
STEP 44

Click into a Deal



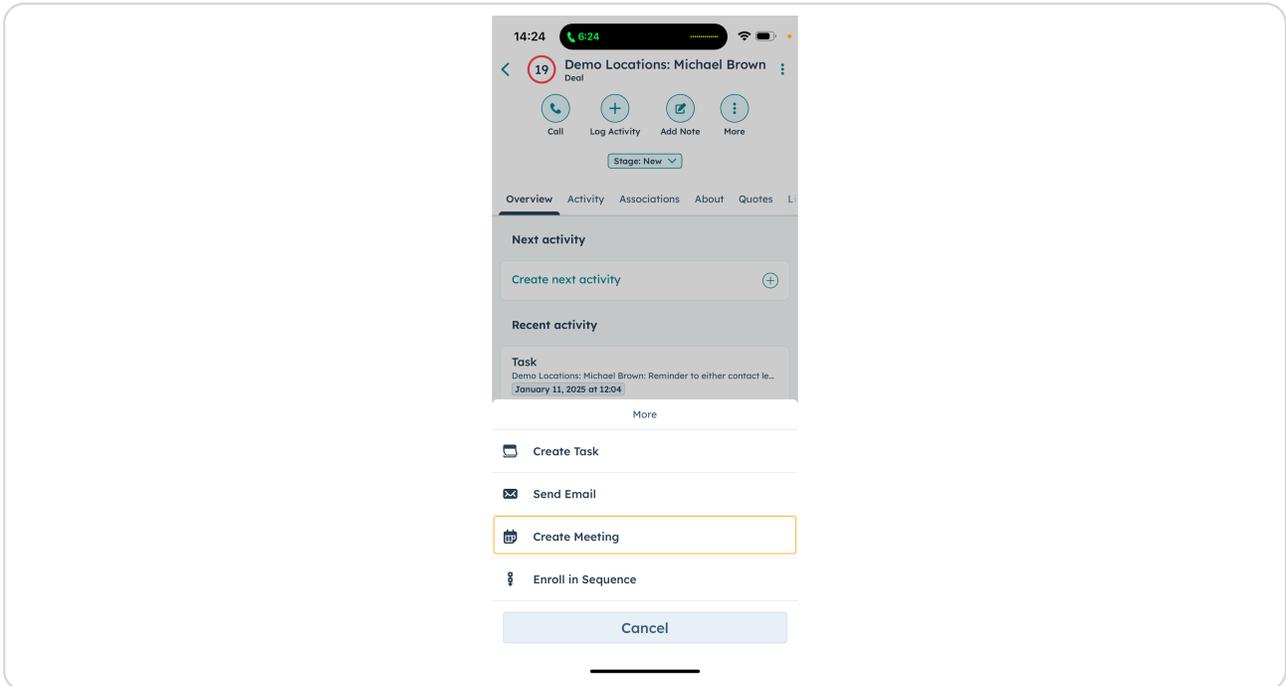
STEP 45

At the top, Click the More button



STEP 46

Click Create Meeting

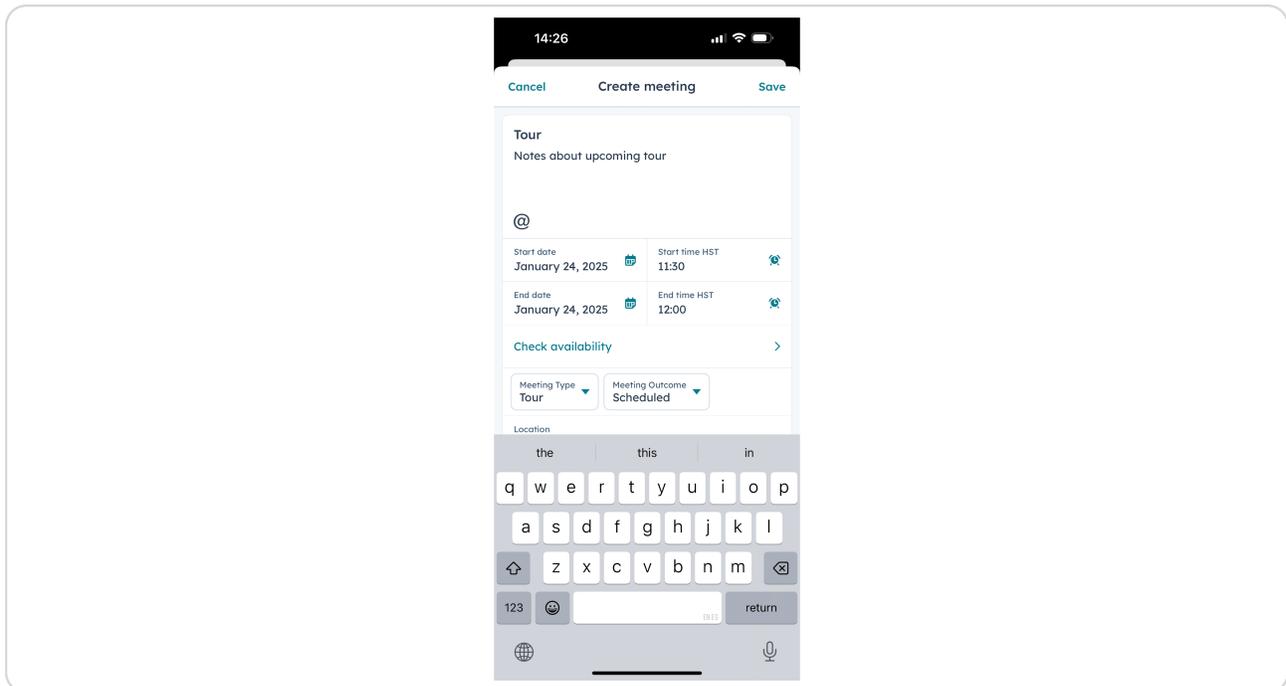


STEP 47

Update the Tour information

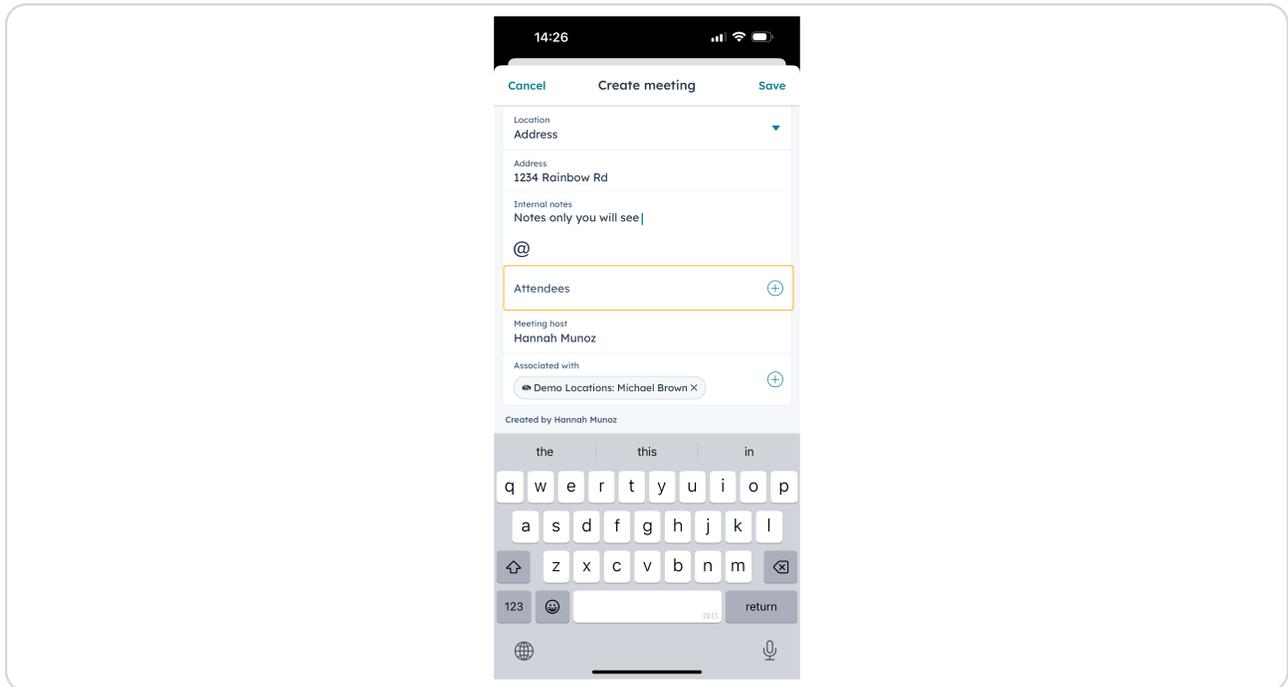
This includes:

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



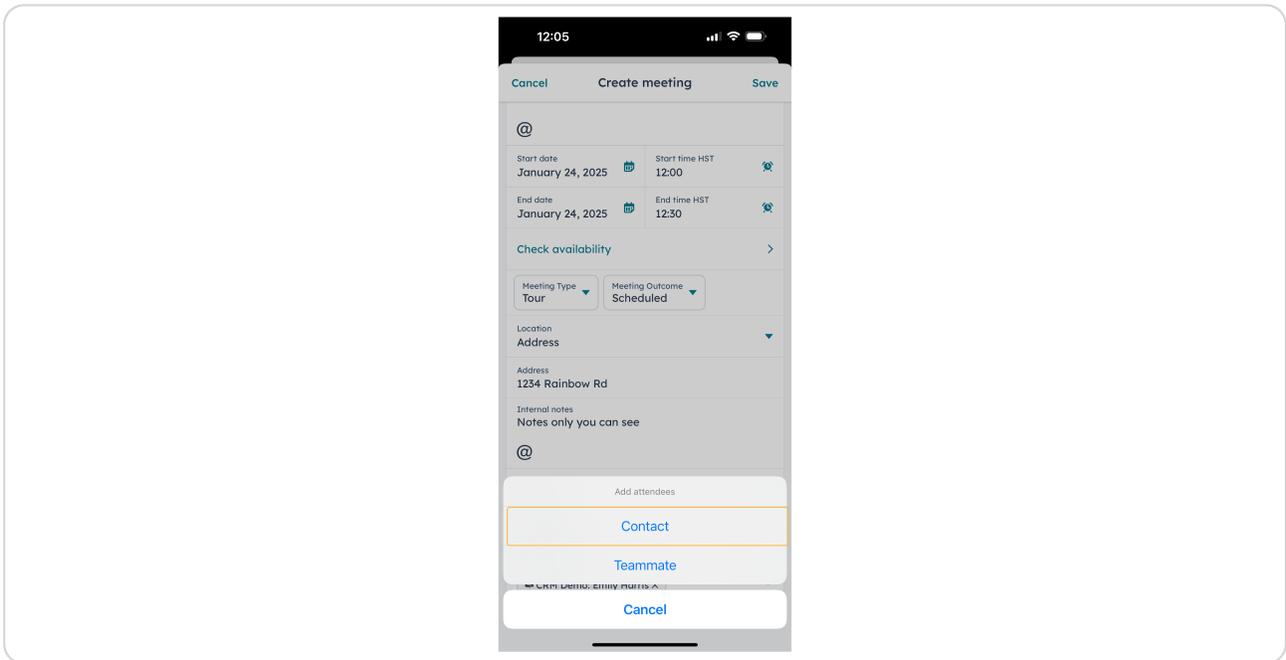
STEP 48

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



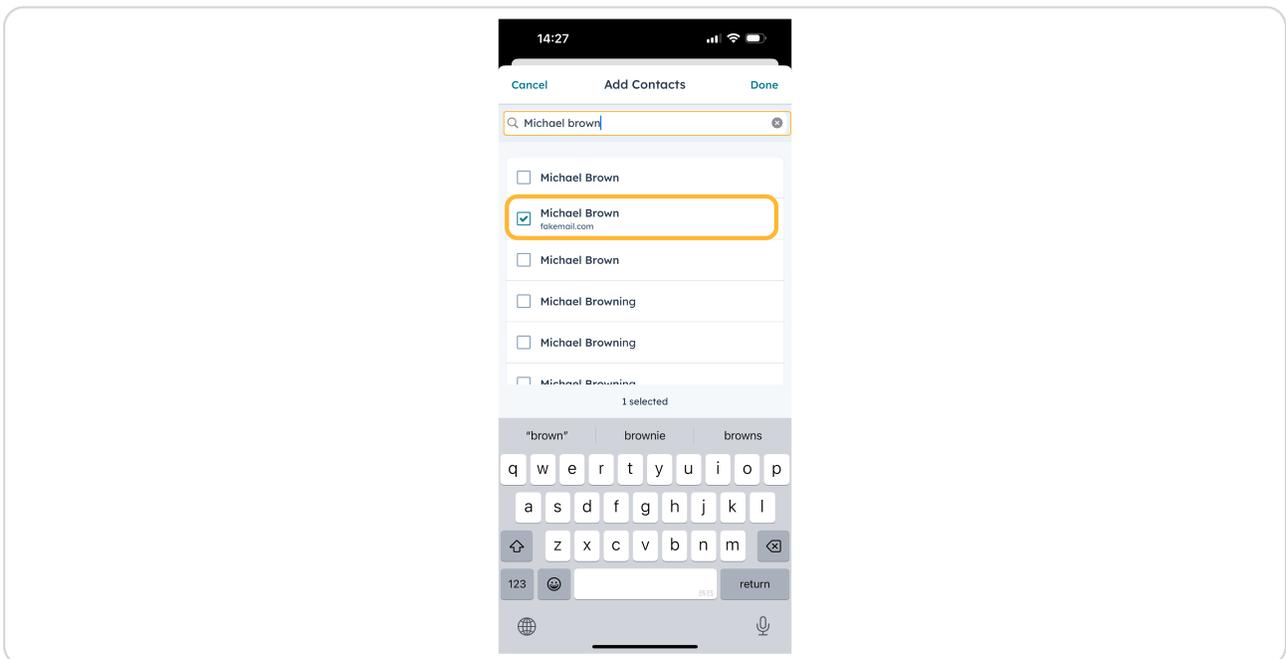
STEP 49

Click Contact



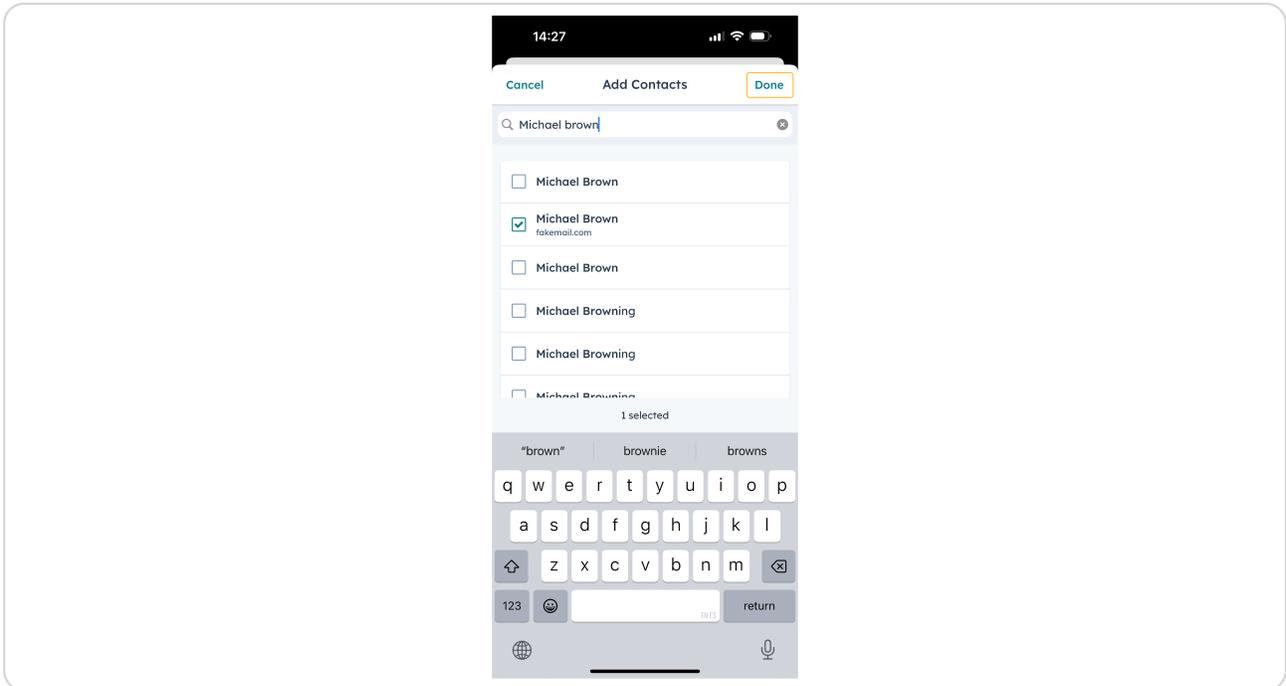
STEP 50

Search and choose the Pro



STEP 51

Click Done



STEP 52

Once the meeting is set, Click Save

The screenshot displays a mobile application interface for creating a meeting. At the top, there are three buttons: 'Cancel', 'Create meeting', and 'Save'. The 'Save' button is highlighted with a yellow border. Below the buttons, the meeting details are organized into sections:

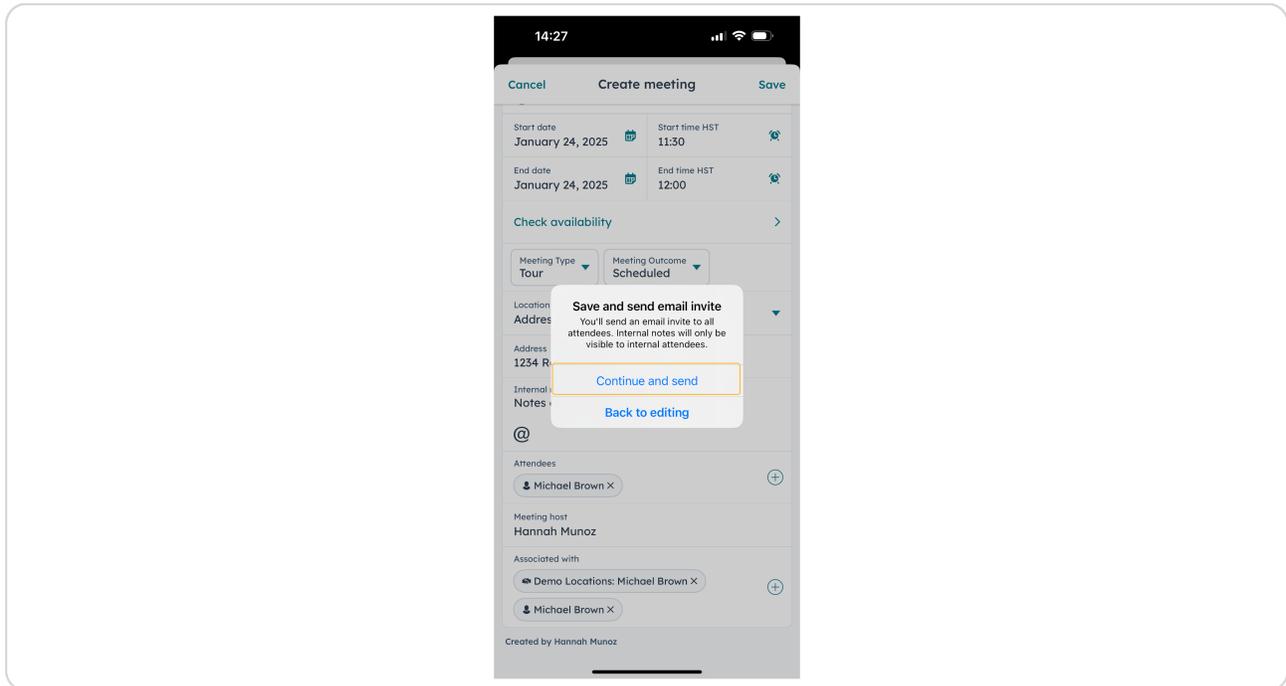
- Start date:** January 24, 2025
- Start time HST:** 11:30
- End date:** January 24, 2025
- End time HST:** 12:00

Below these fields is a 'Check availability' link with a right-pointing arrow. The next section contains two dropdown menus: 'Meeting Type' set to 'Tour' and 'Meeting Outcome' set to 'Scheduled'. This is followed by a 'Location' section with a dropdown arrow, and an 'Address' field containing '1234 Rainbow Rd'. Below the address is an 'Internal notes' field with the text 'Notes only you will see' and a '@' icon. The 'Attendees' section lists 'Michael Brown X' with a plus icon to its right. The 'Meeting host' is 'Hannah Munoz'. The 'Associated with' section lists 'Demo Locations: Michael Brown X' and 'Michael Brown X', both with plus icons. At the bottom, it says 'Created by Hannah Munoz'.

STEP 53

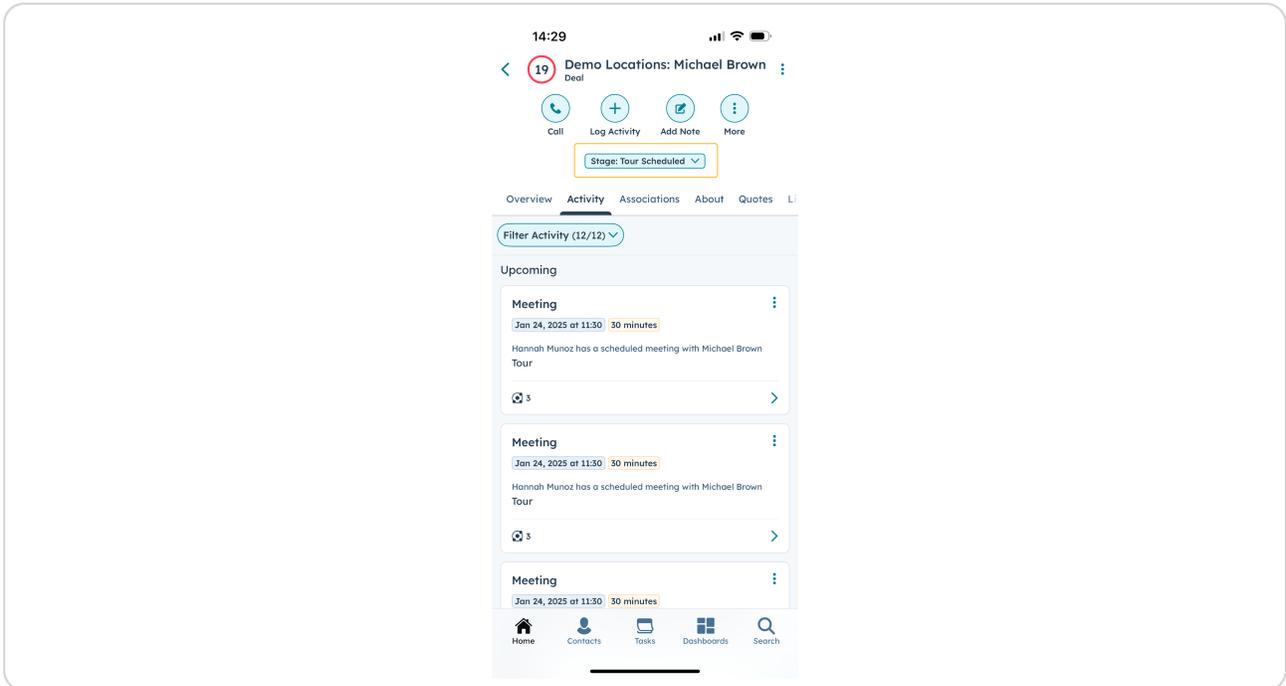
Click Continue and send

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



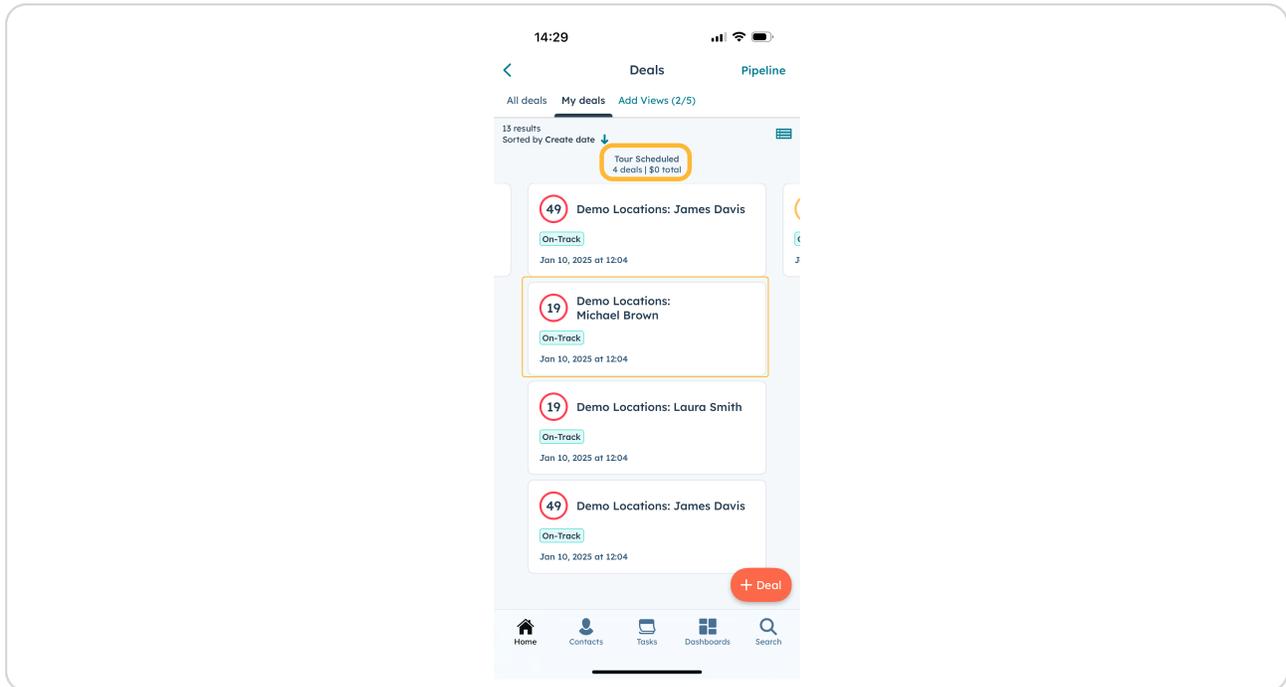
STEP 54

The Deal will automatically update to the Stage: Tour Scheduled



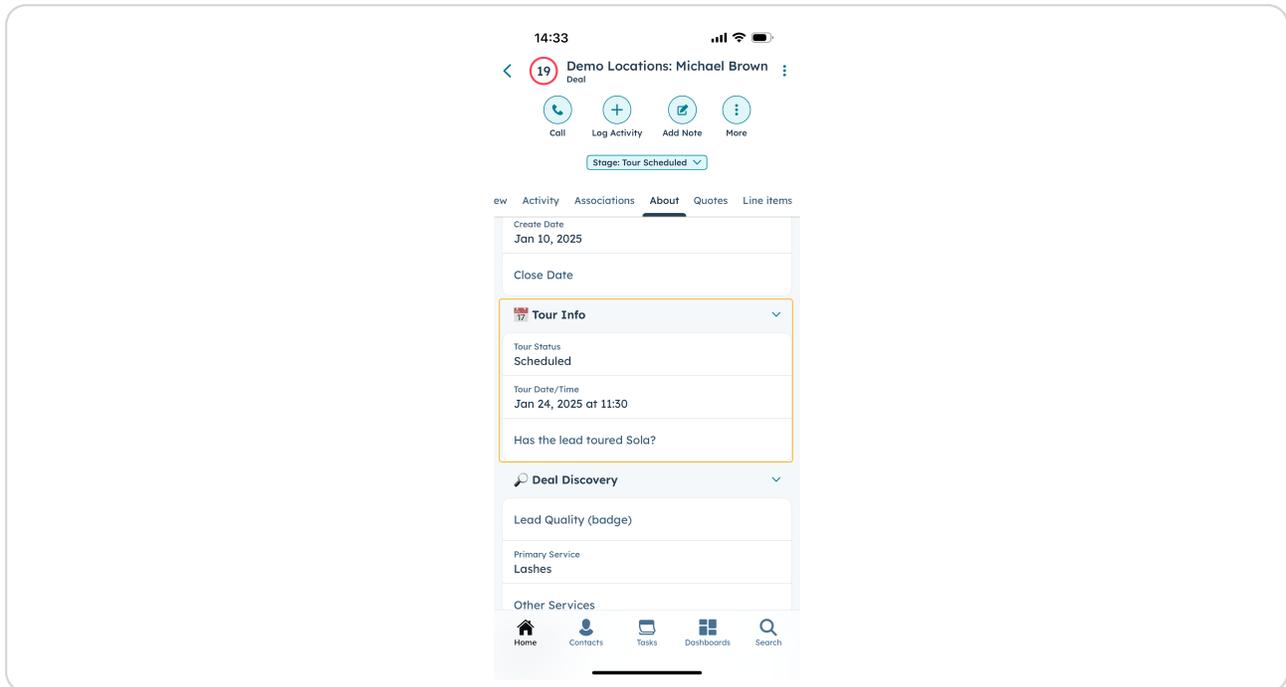
STEP 55

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



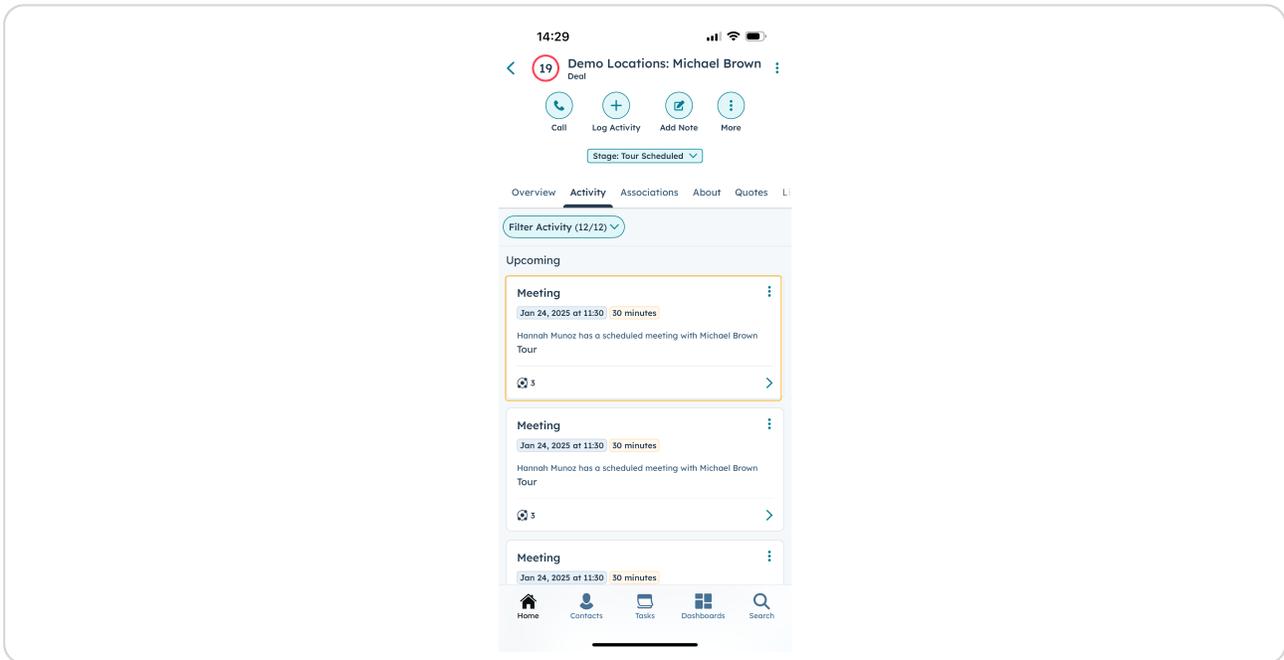
STEP 56

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



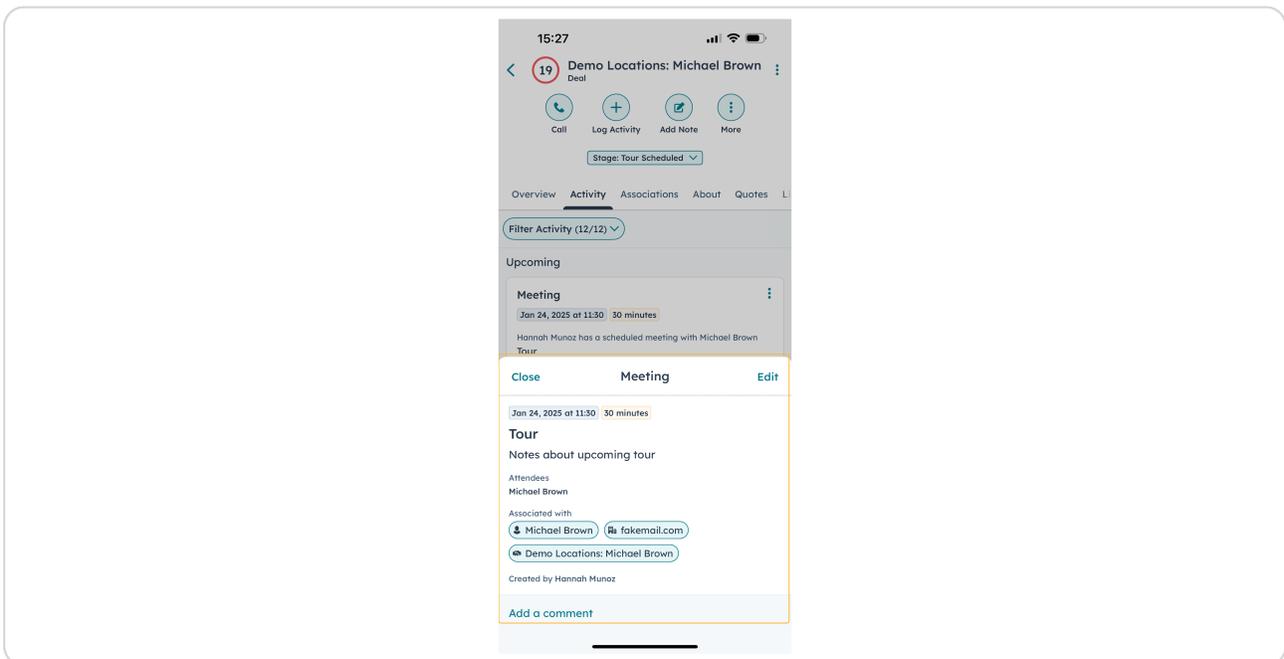
STEP 57

In the Activity tab, you'll see the Tour



STEP 58

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



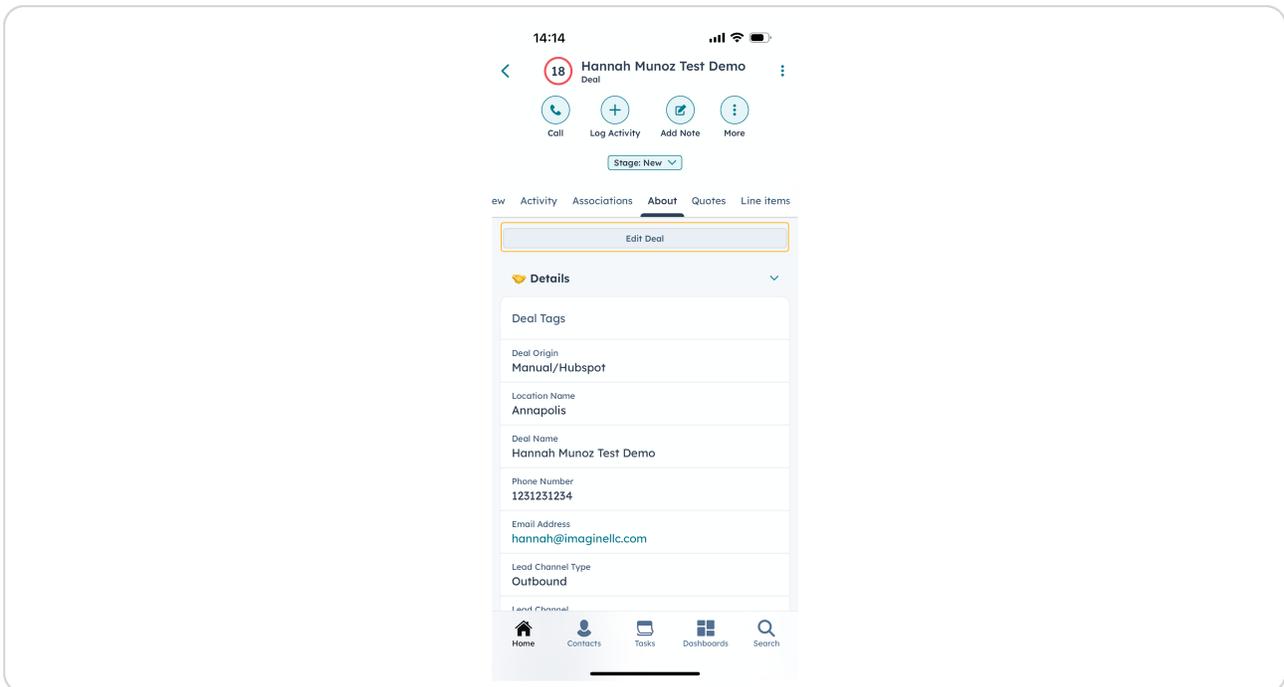
Scheduling a Tour Without Sending an Invite

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

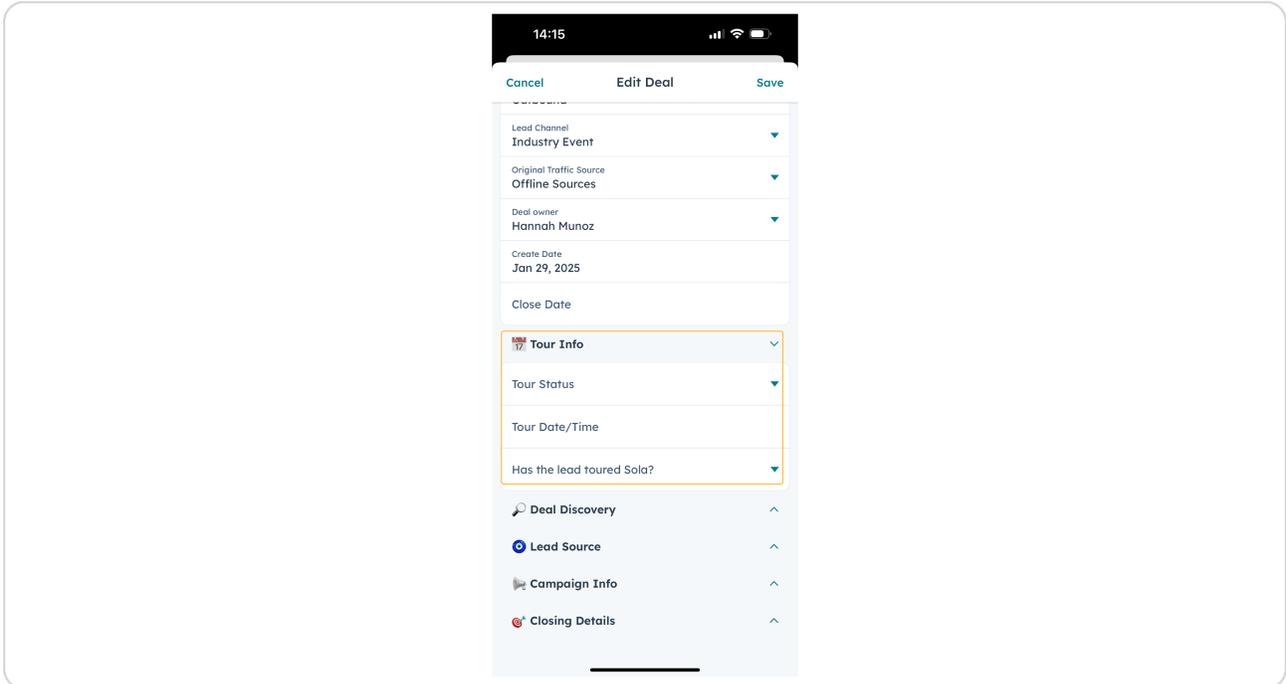
On the About tab of the Deal, Click Edit Deal



STEP 60

Scroll to Tour Info

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



STEP 61

Update Tour Status

14:15

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

Has the lead toured Sold?

Deal Discovery

Lead Source

Campaign Info

Closing Details

STEP 62

Update Date/Time

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

The screenshot shows a mobile application interface for editing a deal. At the top, there are three buttons: "Cancel", "Edit Deal", and "Save". Below these are several form fields:

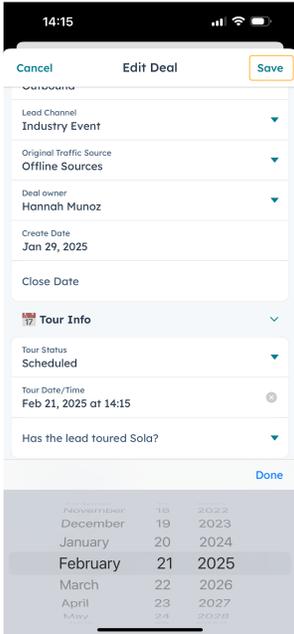
- Lead Channel: Industry Event
- Original Traffic Source: Offline Sources
- Deal owner: Hannah Munoz
- Create Date: Jan 29, 2025
- Close Date: (empty)
- Tour Info: (expanded section)
- Tour Status: Scheduled
- Tour Date/Time: Feb 21, 2025 at 14:15 (highlighted with a date picker)
- Has the lead toured Sola?: (empty)

The date picker is open, showing a list of months and years. The selected date is February 21, 2025.

Month	Day	Year
November	18	2022
December	19	2023
January	20	2024
February	21	2025
March	22	2026
April	23	2027
May	24	2028

STEP 63

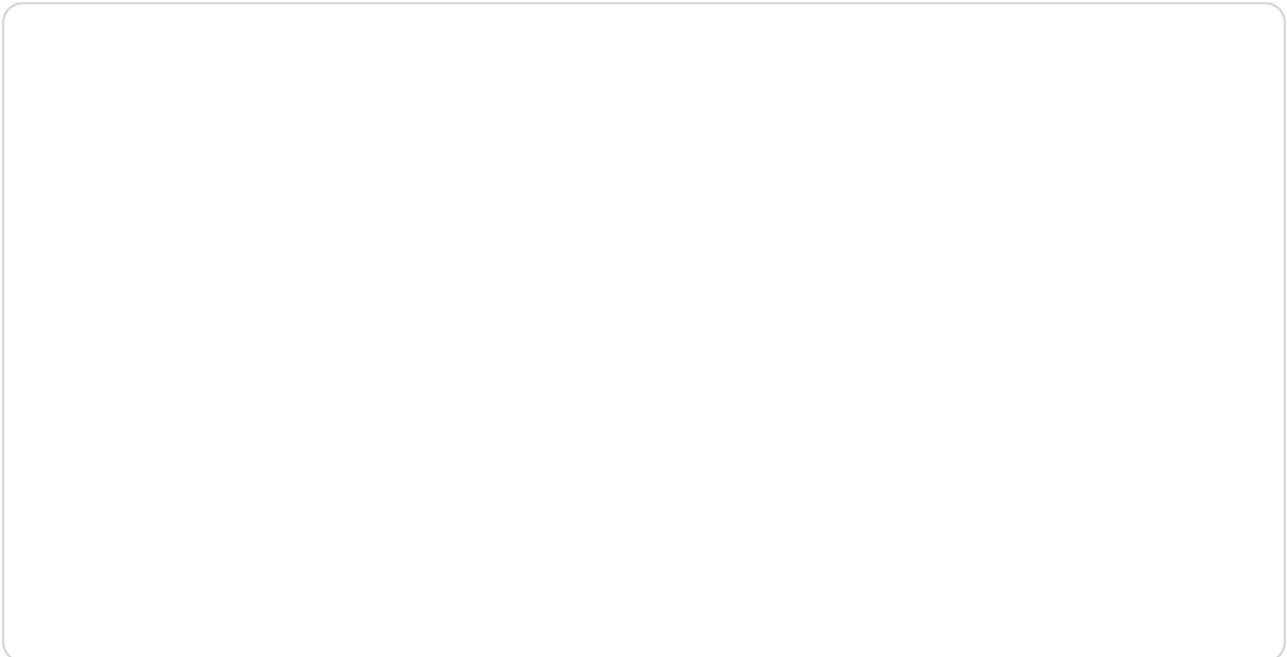
Click Save



The screenshot shows a mobile application interface for editing a deal. At the top, there are three buttons: 'Cancel', 'Edit Deal', and 'Save'. Below these are several form fields with dropdown menus: 'Lead Channel' (Industry Event), 'Original Traffic Source' (Offline Sources), and 'Deal owner' (Hannah Munoz). There are also fields for 'Create Date' (Jan 29, 2025) and 'Close Date'. A section titled 'Tour Info' contains 'Tour Status' (Scheduled), 'Tour Date/Time' (Feb 21, 2025 at 14:15), and a dropdown for 'Has the lead toured Sola?'. At the bottom, a date picker is open, showing a calendar grid with 'February 21 2025' selected. A 'Done' button is located at the bottom right of the date picker.

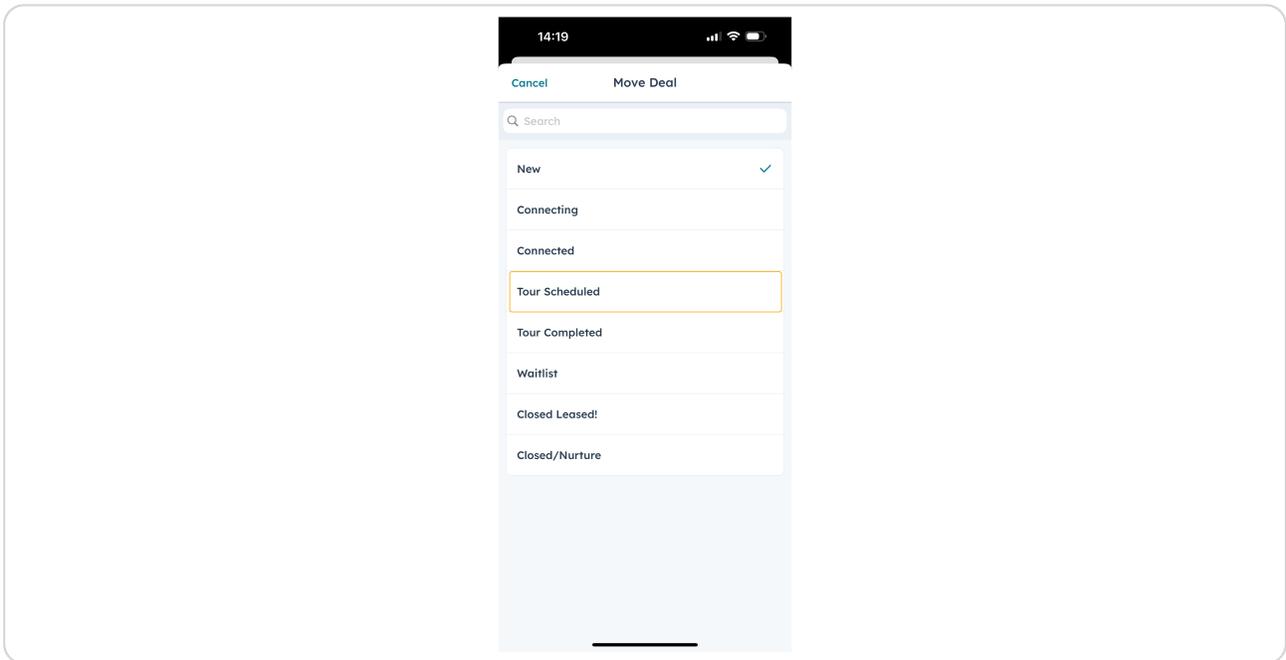
STEP 64

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



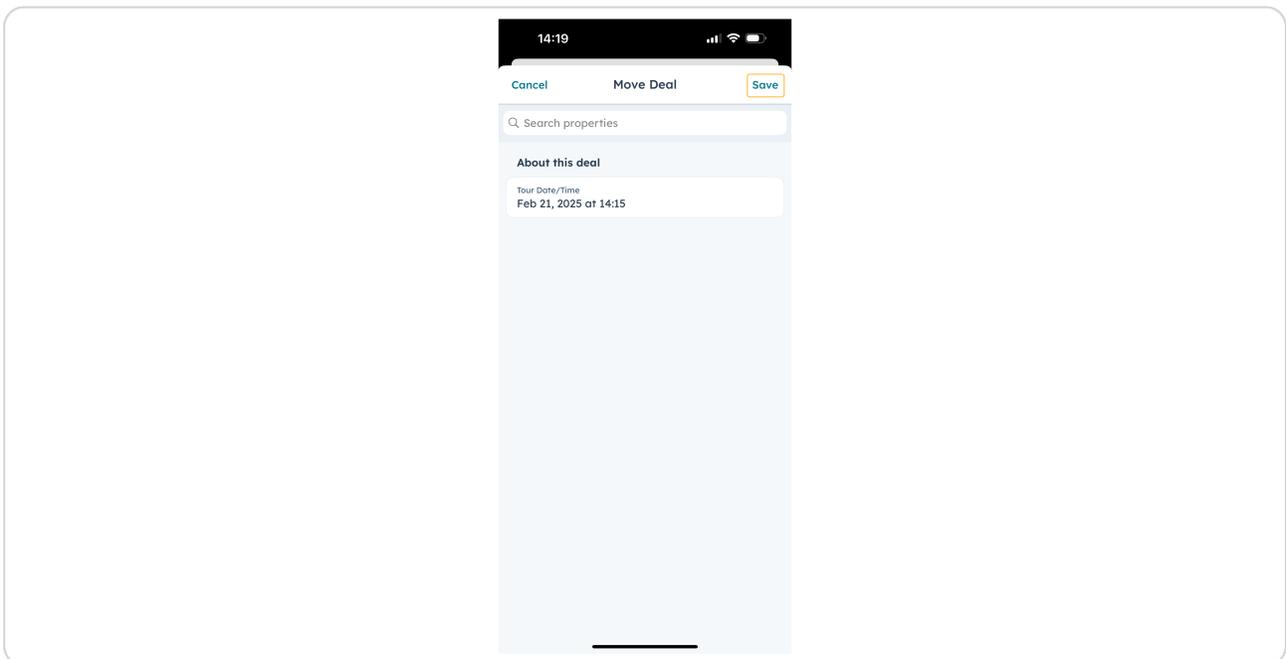
STEP 65

Click Tour Scheduled



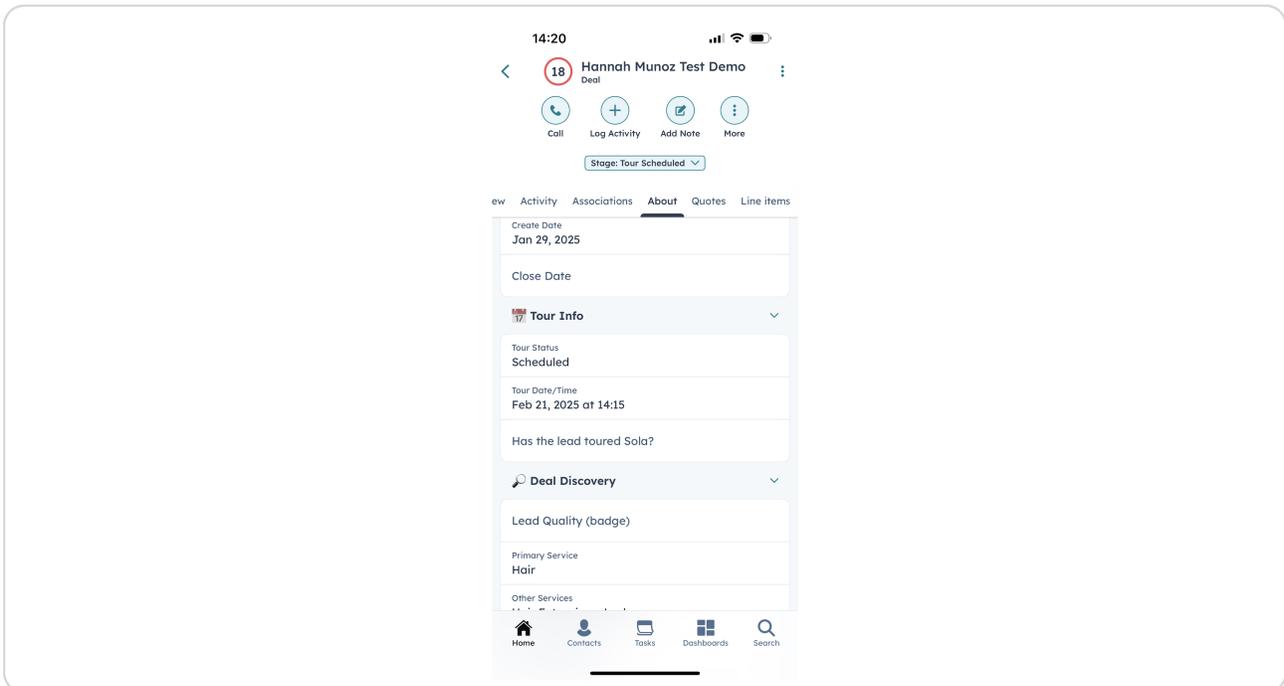
STEP 66

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



STEP 67

Your Deal will be updated



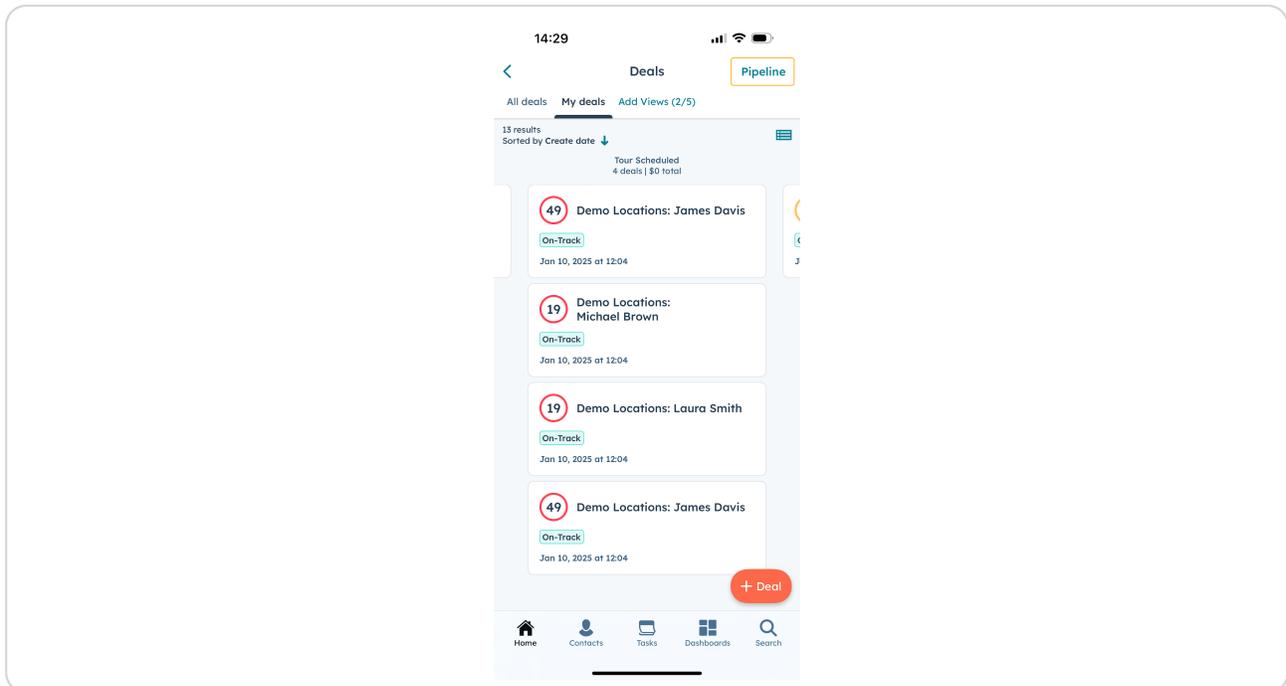
Switching Pipelines

3 Steps

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

STEP 68

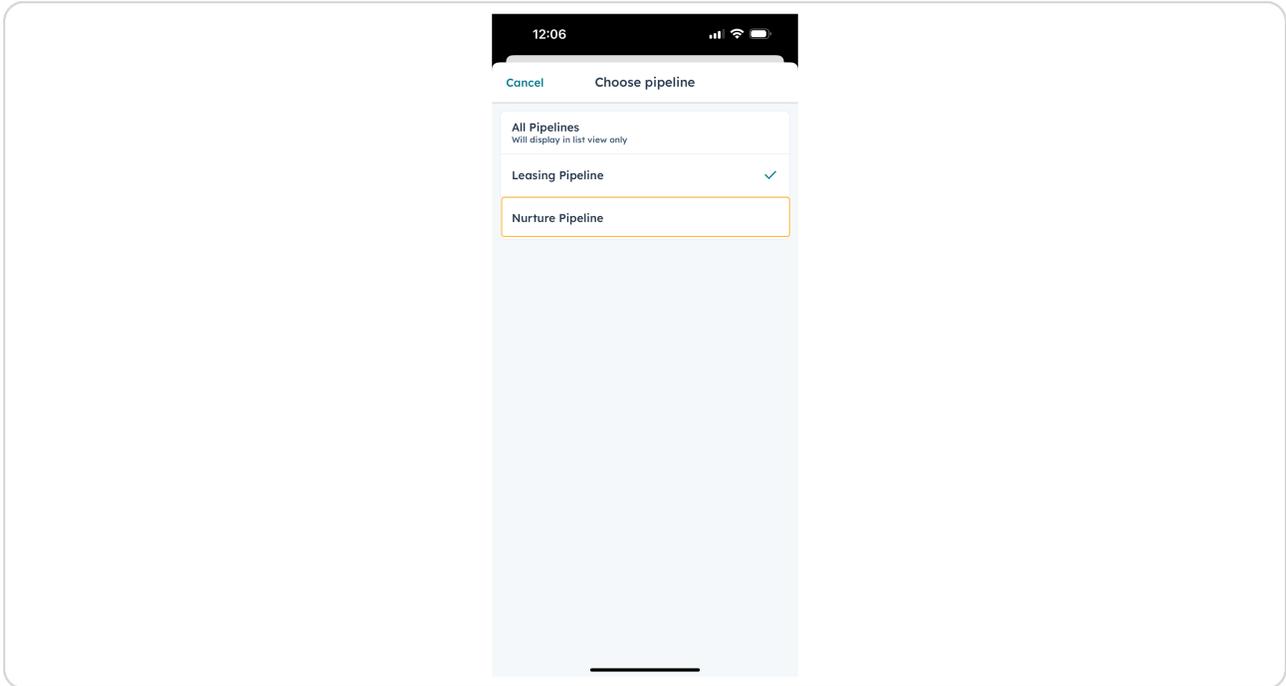
In the Deal Overview, Click Pipeline in the top right-hand corner



STEP 69

Click Nurture Pipeline

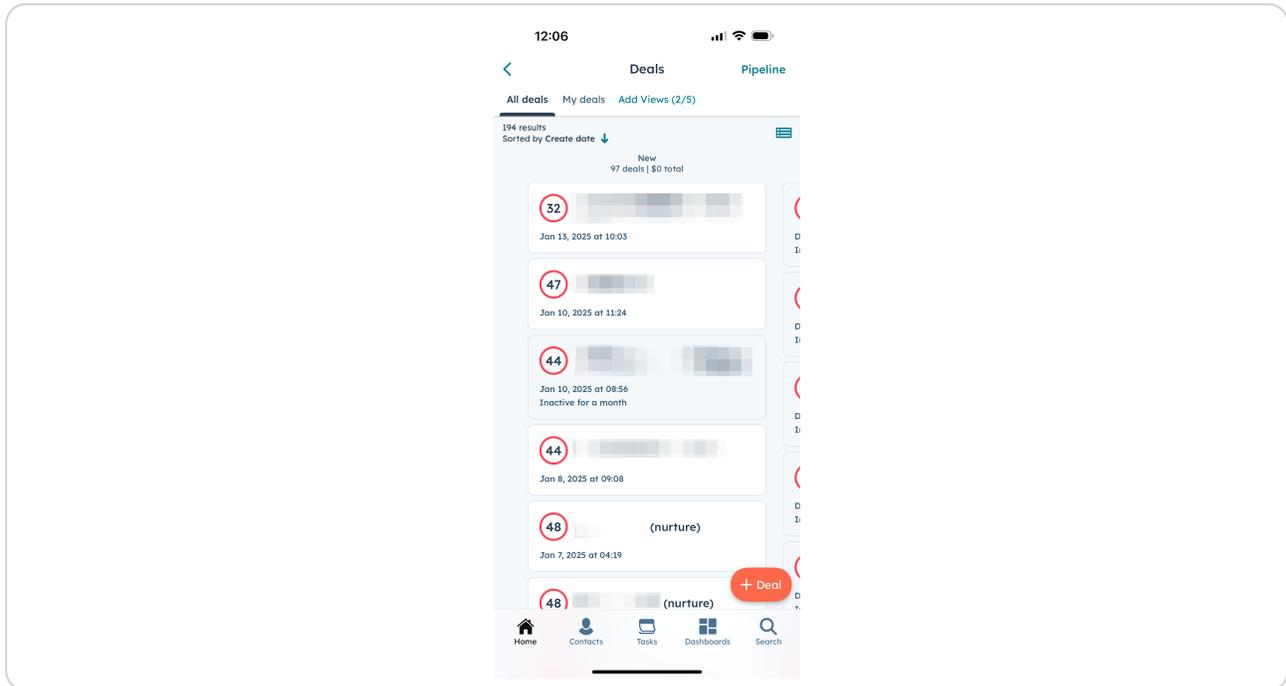
Note: There will be a check mark next to the pipeline you are currently viewing.



STEP 70

The Pipeline will be switched

The Deal Names have been blurred for confidentiality reasons.



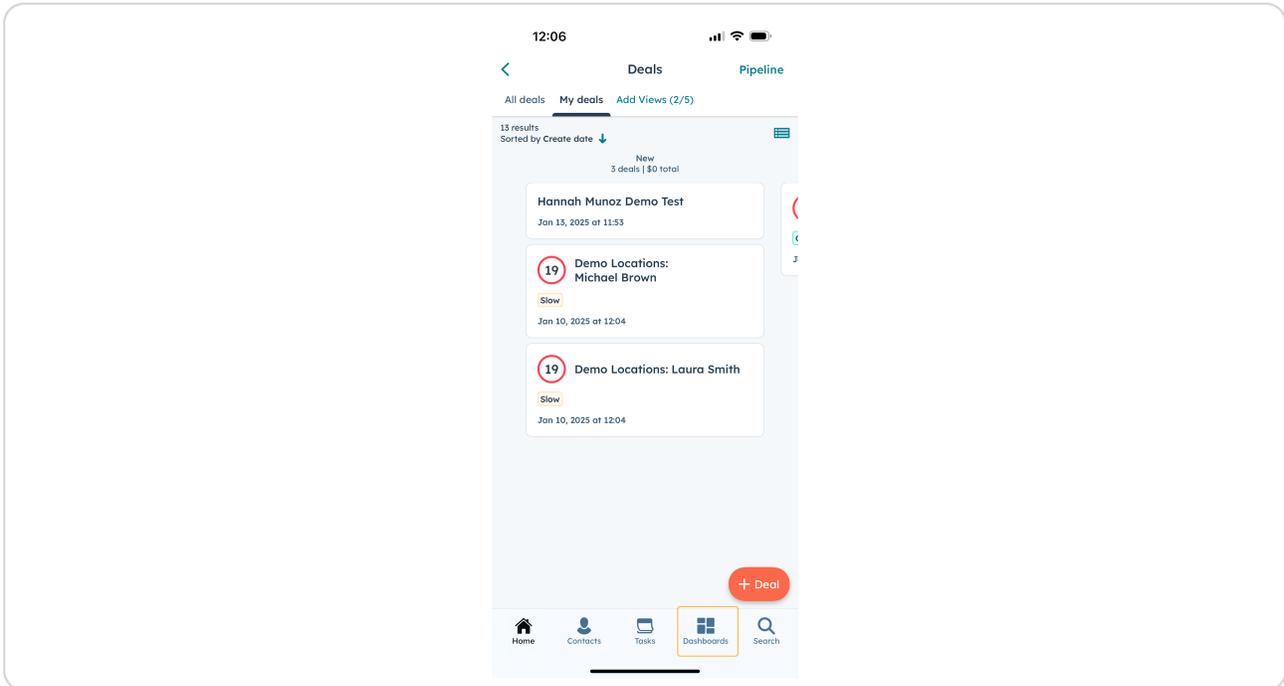
Accessing Dashboards

4 Steps

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

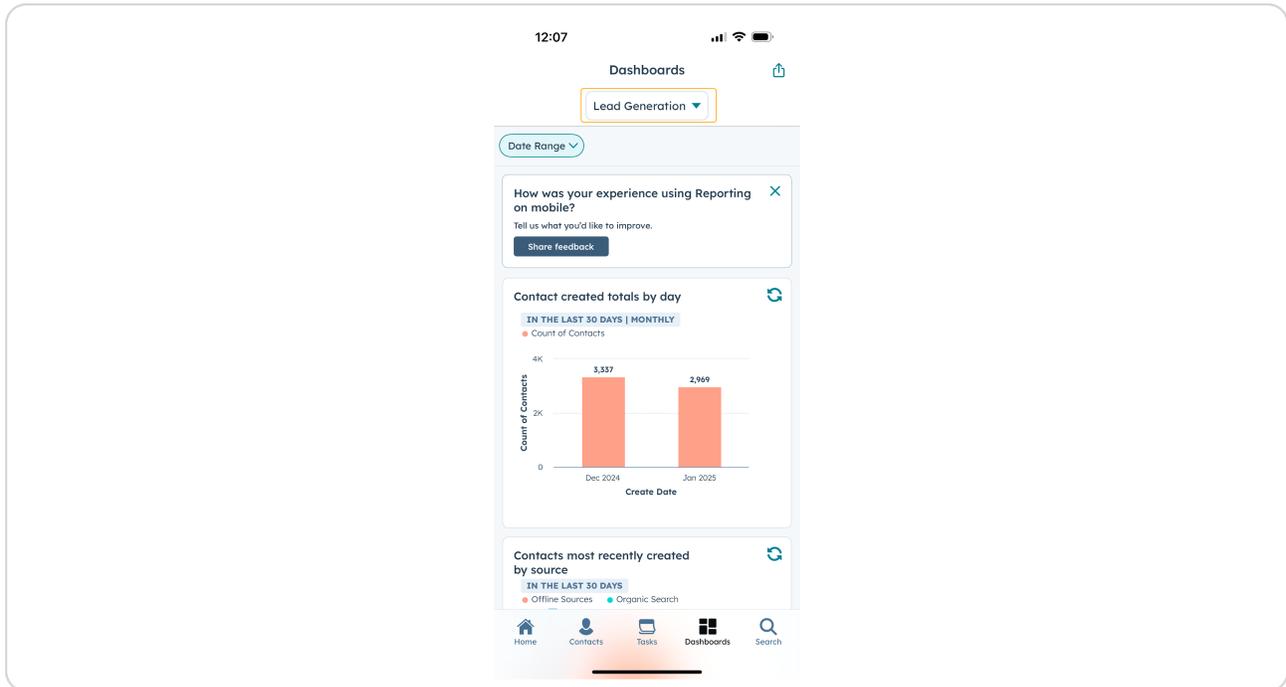
STEP 71

On any screen in the App, Click the Dashboards button



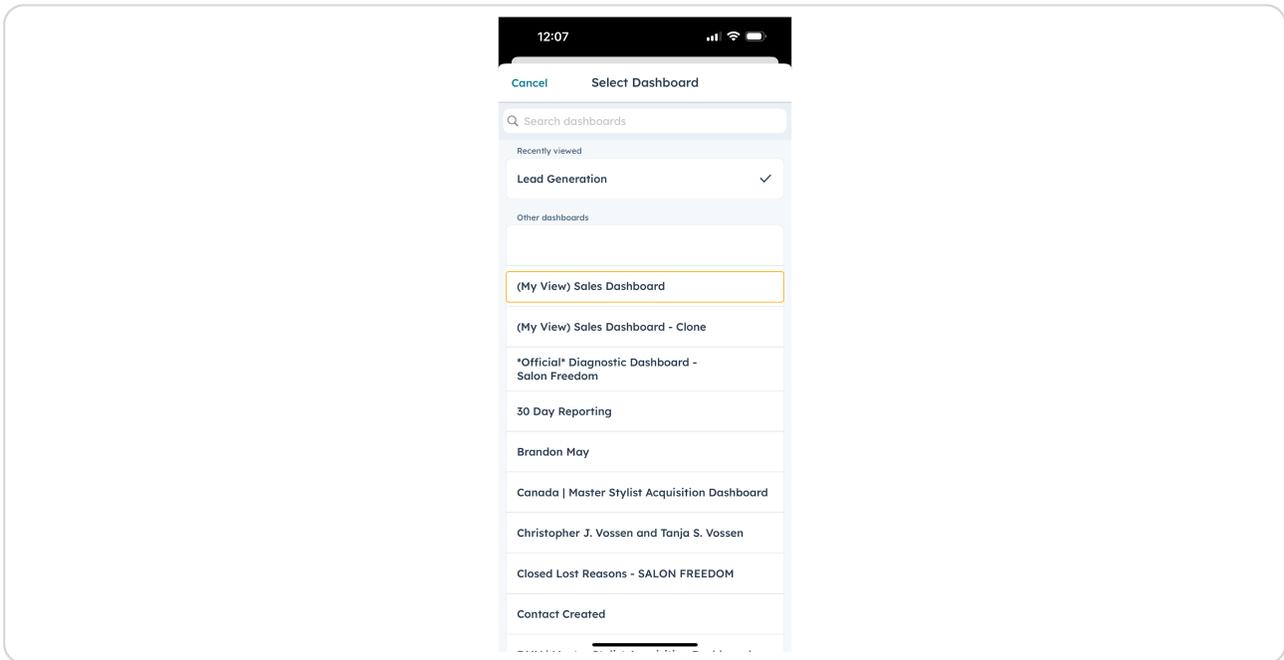
STEP 72

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



STEP 73

Select the Dashboard you want to view



STEP 74

The Dashboard will switch

