

# Sola Salon Studios - Adding Updating a Deal Location

A change has been made to how a Location should be added to a Deal. This guide will walk you through the changes to the process that you'll want to account for when you are creating and updating your Deals.

13 Steps [View most recent version](#) 

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Created by	Creation Date	Last Updated
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## STEP 1

### Click on Create deal

The screenshot shows the HubSpot interface for a user named 'Sola Salons Hubspot+ UAT'. At the top, there is a dark navigation bar with icons for a clock, settings, and a bell, followed by a 'Copilot' icon and the user's name. Below this, there are three buttons: 'Actions' (with a dropdown arrow), 'Import', and 'Create deal' (which is highlighted with an orange border). Underneath the buttons, there is a section for 'Online Deals' with a '+ Add view (8/50)' link and an 'All Views' link. Below that, there is an 'Advanced filters' section with three icons for undo, copy, and save. At the bottom, there is a 'Create report' button with an external link icon and a 'Board options' dropdown menu. The bottom part of the screenshot shows a table with columns for 'ED', '1,486' (with a left arrow), 'TOUR COMPLETED', '1,895' (with a left arrow), and 'WAITLIS'.

## STEP 2

### Fill out the information requested

Note: Nothing else has changed in the form except for the Location.

The screenshot displays a CRM interface with a 'Create deal' modal form open. The modal form is titled 'Create deal' and includes the following fields:

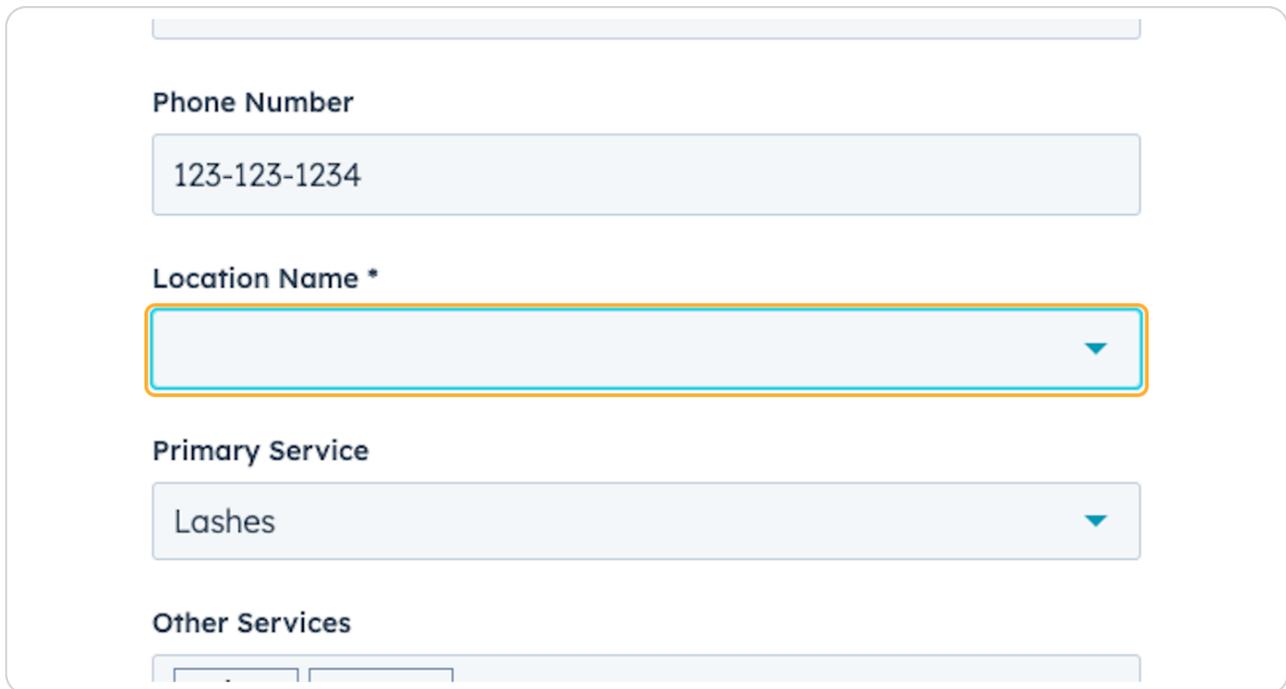
- Deal name \*: Hannah Munoz Test Deal
- Pipeline \*: Leasing Pipeline
- Deal stage \*: New
- Email Address: hannah@imaginellc.com
- Phone Number: 123-123-1234
- Location Name \*: (empty)
- Primary Service: Lashes
- Other Services: Hair x, Brows x

The background shows a 'Deals' table with columns for Deal owner, Create date, Last activity date, and Close date. The table is filtered by 'Leasing Pipeline' and shows deal cards for various owners and services. The total value for each column is displayed at the bottom: Total: \$275, Total: \$18,556, and Total: \$15,161.

### STEP 3

#### Click on Location Name

Instead of having a Location association at the bottom of the Deal form, you will now need to choose the Location from a dropdown selection.



The image shows a screenshot of a web form with several input fields. The fields are: 'Phone Number' with the value '123-123-1234'; 'Location Name \*' which is a dropdown menu highlighted with a blue and orange border; 'Primary Service' with the value 'Lashes'; and 'Other Services' which is a multi-select dropdown menu. The form is enclosed in a light gray rounded rectangle.

STEP 4

Search for the Location

123-123-1234

Location Name \*

▼

annap| ×

Annapolis

Other Services

Hair × Brows × ▼

## STEP 5

### Click on the Location

Note: There is a chance for a duplicate Location to exist between states. If that is the case, the Location will have parentheses around the state of that Location so you can choose the correct option.

**Location Name \***

×

Annapolis

**Other Services**

Hair × Brows × ▼

**Lead Type \***

▼

## STEP 6

The association section for Location has been removed from the form

The screenshot displays a CRM interface with a 'Deals' pipeline and a 'Create deal' form overlay. The pipeline is organized into columns: NEW (58,568), CONNECTING (21,238), and CONNECTED (13,543). Each column contains deal cards with details such as deal owner, location, primary service, and activity status. The 'Create deal' form is open on the right, featuring the following fields:

- Primary Service:** Lashes
- Other Services:** Hair x, Brows x
- Lead Type \*:** Inbound
- Lead Channel \*:** Paid Social
- Lead Channel Detail:** (Empty field)
- No of Chairs:** 1
- Current Situation:** Booth Rent x
- Deal owner \*:** Hannah Munoz

At the bottom of the form, there are three buttons: 'Create', 'Create and add another', and 'Cancel'.

## STEP 7

Click Create. The Deal will be created and the Location will be added as an association to the Deal

The screenshot displays a software interface for managing deals. On the left, a list of deal cards is visible. Each card shows a status of 'At-Risk' in a red box, a location icon, and text indicating 'No activity for 2 months' and 'No activity scheduled'. One card is expanded to show details for 'Claude QASmsTestDuplicateFour', including 'Location: Demo Locations', 'Deal owner: Claude Aparecio', and 'Primary Service: Hair'. Below the cards, a total value of '\$15,161' is shown. On the right, a form titled 'Lead Channel Detail' contains several input fields: 'Lead Channel Detail' (empty), 'No of Chairs' (value: 1), 'Current Situation' (value: Booth Rent), and 'Deal owner \*' (value: Hannah Munoz). At the bottom of the form, three buttons are present: 'Create' (highlighted with a yellow border), 'Create and add another', and 'Cancel'.

## # Updates to Location in the Deal Record

2 Steps

## STEP 8

### In the center of the Deal record under Details, you will now have the ability to see the Location Name and update the Location if needed

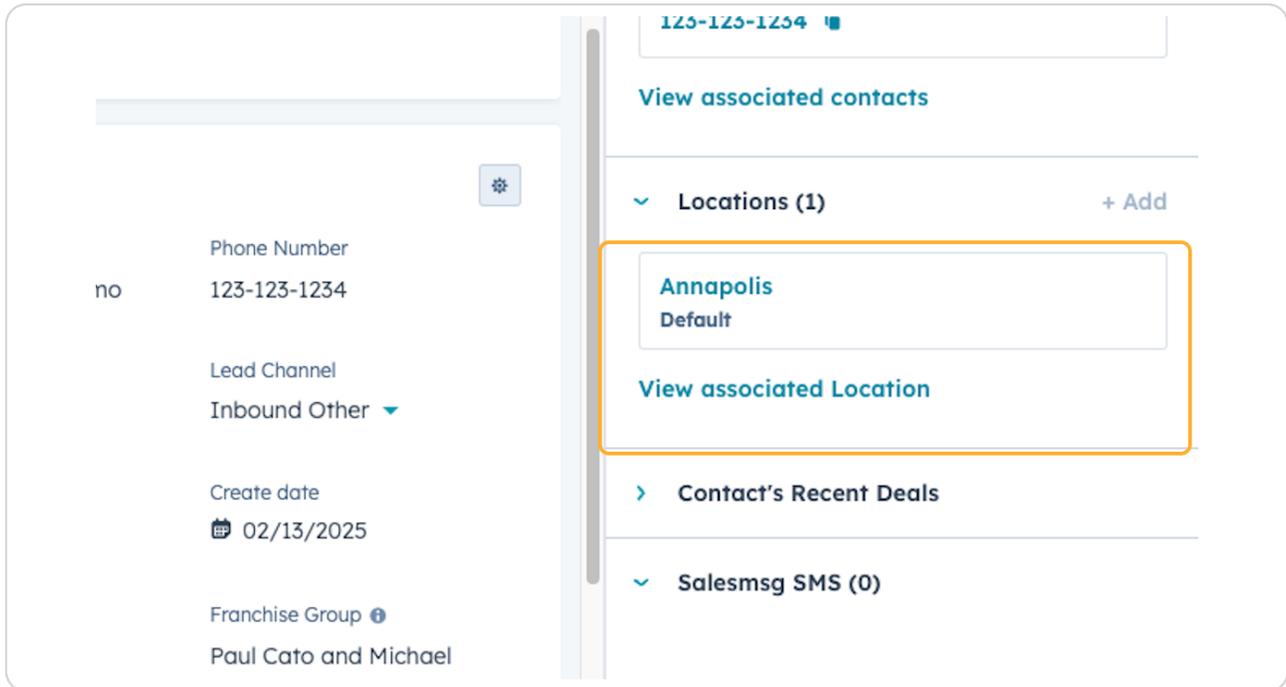
Note: If you update the Location Name, the association will also update. Everything is connected so you only need to update the information in one place.

The screenshot displays a CRM interface for a deal record. On the left, there is a sidebar with a search bar containing 'TEST DEMO', a date field 'DD/YYYY', and a 'line' section with icons for 'Task', 'Meeting', and 'More'. Below this is an 'Actions' section with a dropdown arrow and a gear icon. The main content area is titled 'Message (request)' and shows a message body with a horizontal separator line. Below the separator is the 'Details' section, which is highlighted with a yellow border. The 'Details' section contains the following fields:

Field Name	Value
Location Name	Annapolis
Deal name	Hannah Munoz Test Demo
Email Address	hannah@imaginellc.com
Deal Origin	Hubspot CRM
Channel Group (B)	--
Original Traffic Source	Offline sources

## STEP 9

The Location will also populate as an association located on the right side of the Deal record



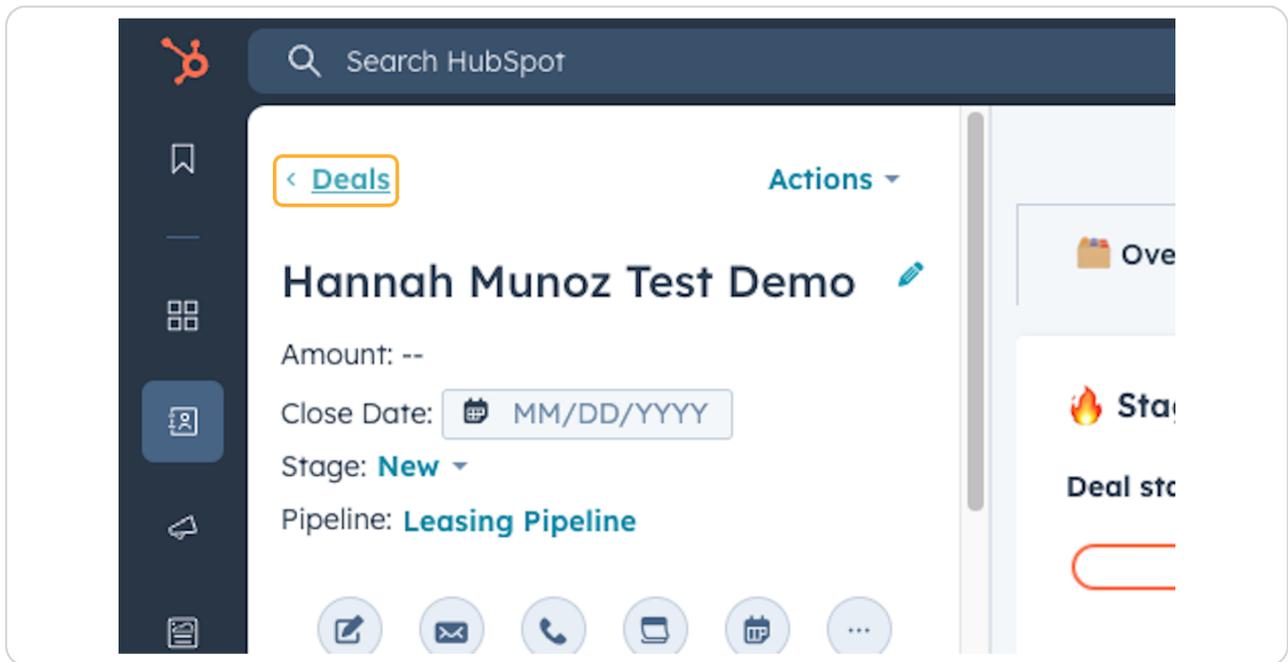
The screenshot displays a CRM interface for a deal record. On the left, a card shows deal details: 'no' (ID), 'Phone Number' (123-123-1234), 'Lead Channel' (Inbound Other), 'Create date' (02/13/2025), and 'Franchise Group' (Paul Cato and Michael). On the right, a sidebar shows associated entities. At the top is the phone number '123-123-1234' with a 'View associated contacts' link. Below is a 'Locations (1)' section with a '+ Add' button. A location card for 'Annapolis' (Default) is highlighted with an orange border and includes a 'View associated Location' link. Further down are sections for 'Contact's Recent Deals' and 'Salesmsg SMS (0)'.

## # Updating the Location from the Deal Card

4 Steps

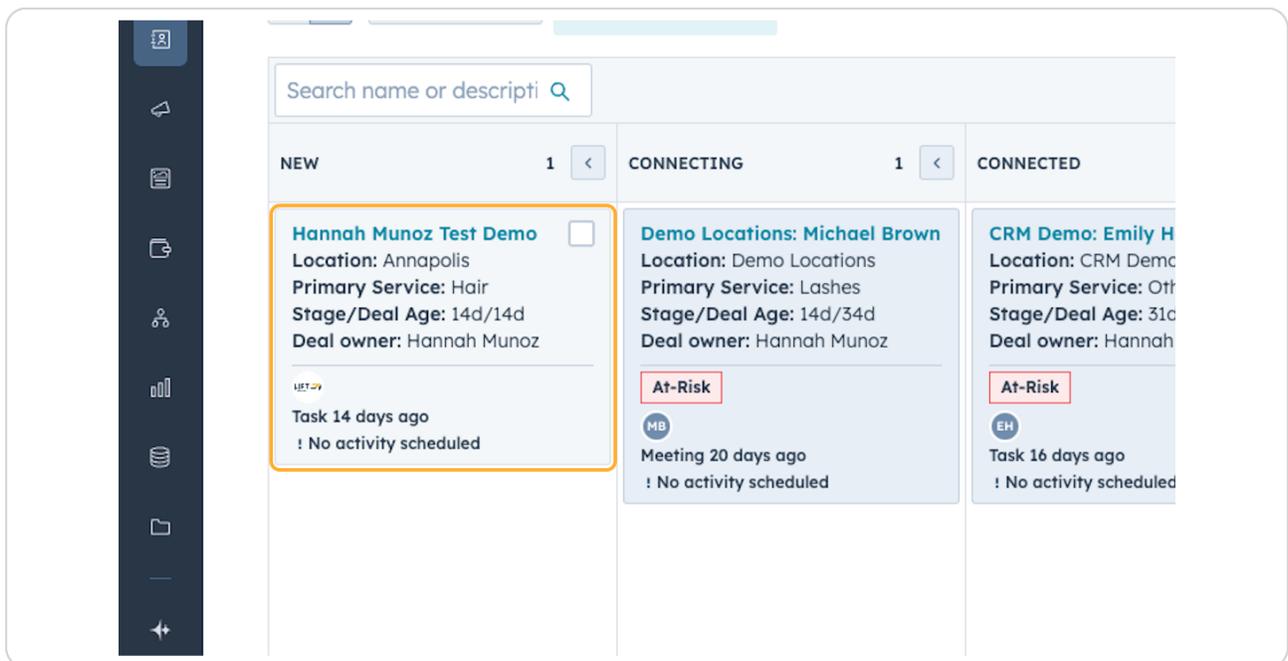
STEP 10

Click on Deals to go back to the index page



STEP 11

Click on the Deal



## STEP 12

### In the Deal Card, Click Edit Deal

Location: James  
Location: Microbl  
e: 34d/34  
annah Mur

Note Email Call Task Meeting More

Deal Summary

At-Risk Hair Edit Deal

Deal stage: New FOR 15 DAYS

month  
cheduled

Stage/Deal Age: 14d/14d

Location: Laura  
Location:

## STEP 13

The Location Name will appear under Deal Summary. You are able to update the Location Name here

Edit Deal

Deal Summary

Location Name  
Annapolis

Tour Date/Time  
--

Has the lead toured Solo?  
--

Deal owner  
Hannah Munoz

Deal Discovery

Lead Quality (brand fit)  
--

Primary Service  
Other Services

