Sola Salon Studios - Adding Self Sourced Deals to HubSpot

This step-by-step guide will walk you through creating a new Deal in HubSpot and how Leads get created at the same time.

23 Steps   [View most recent version]

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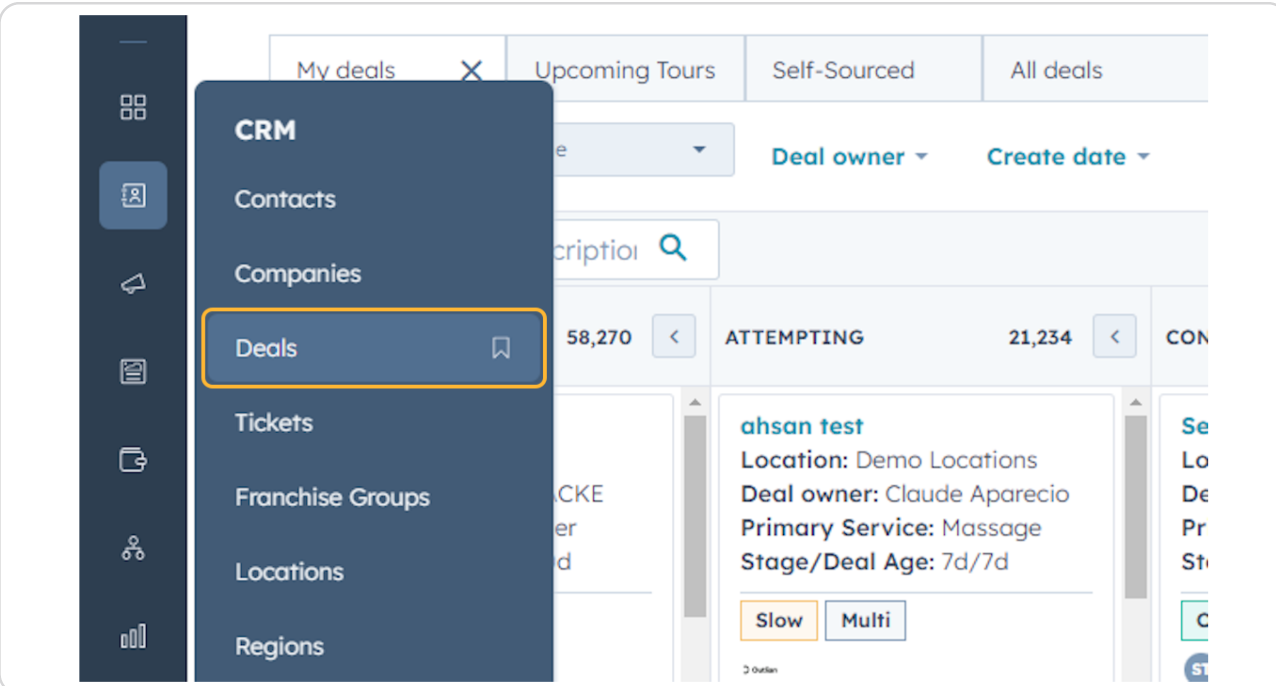
STEP 1

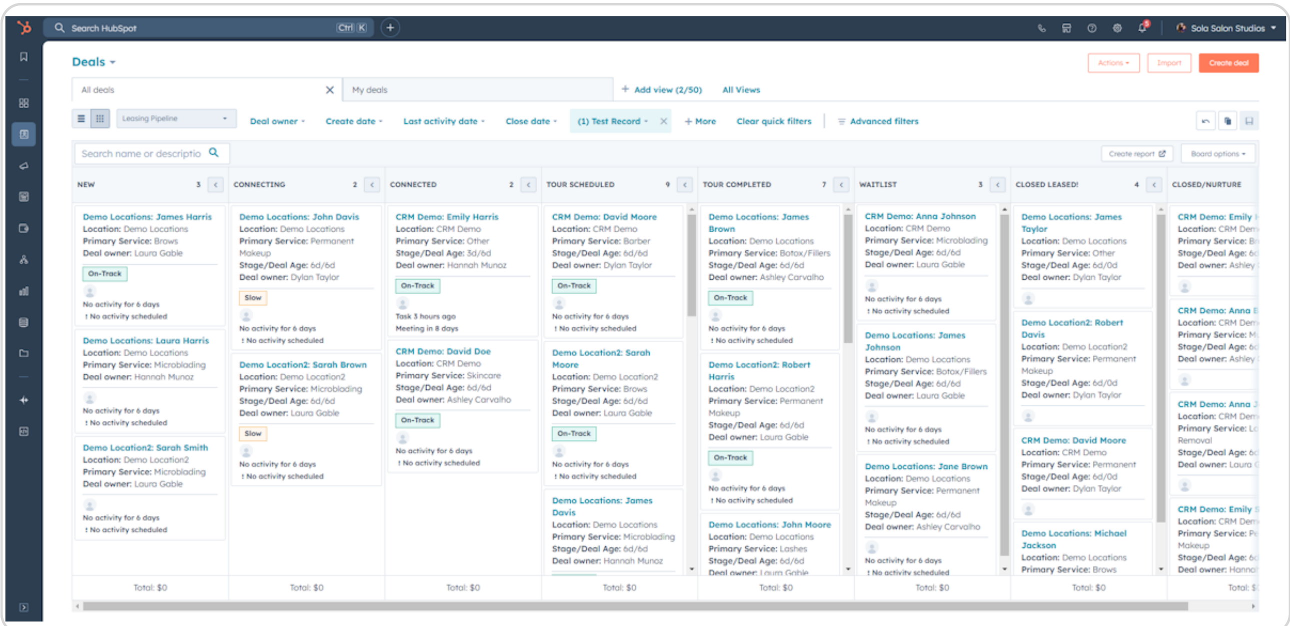
If you aren't already in Deals, Navigate to Deals

Hover over the CRM section in the navigation to the left and Click on Deals



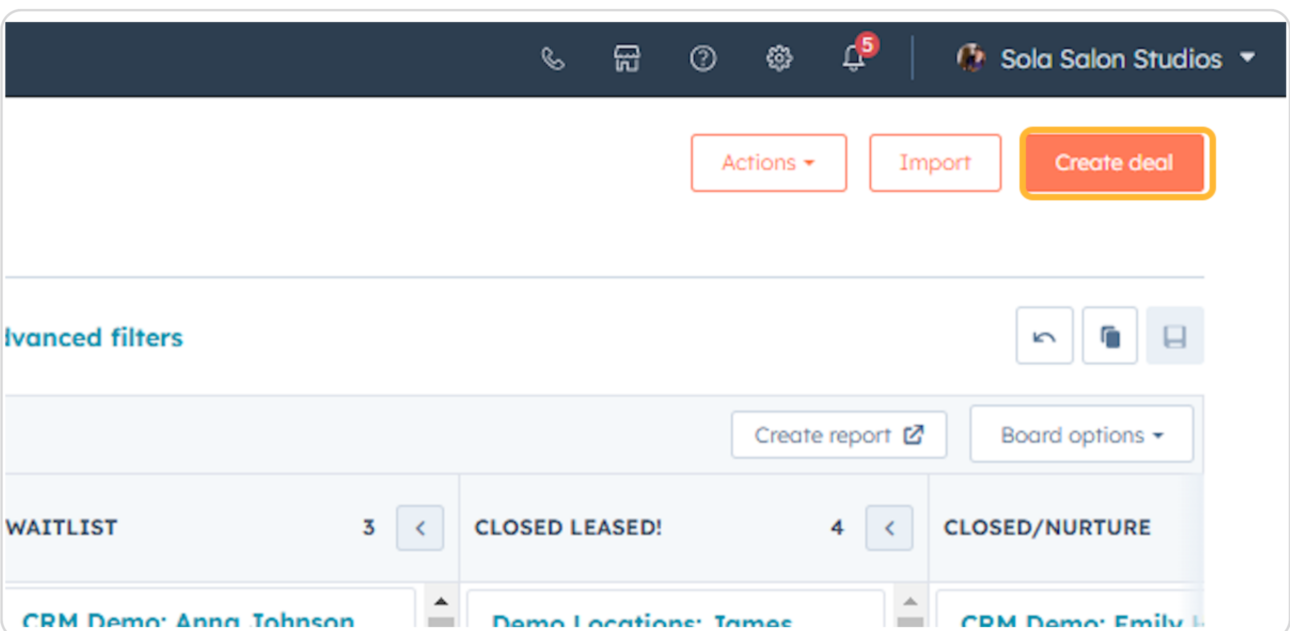
STEP 2

You'll be taken to the Deals index page



STEP 3

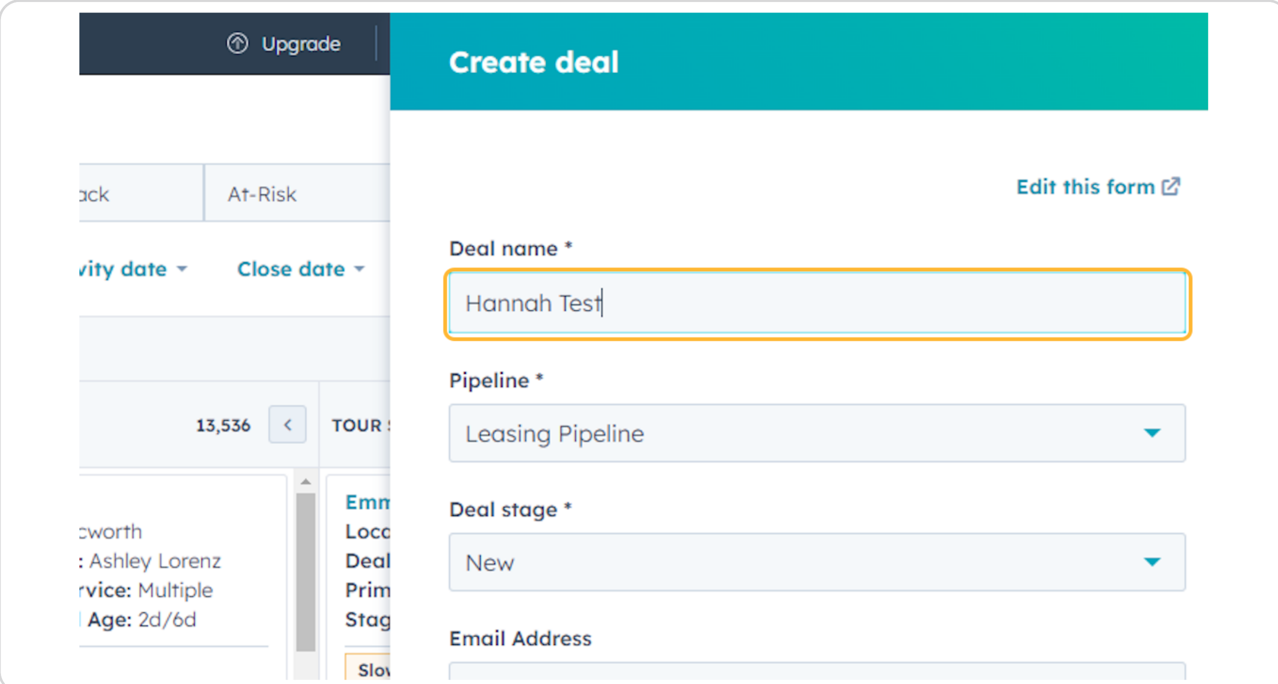
Click on Create deal



STEP 4

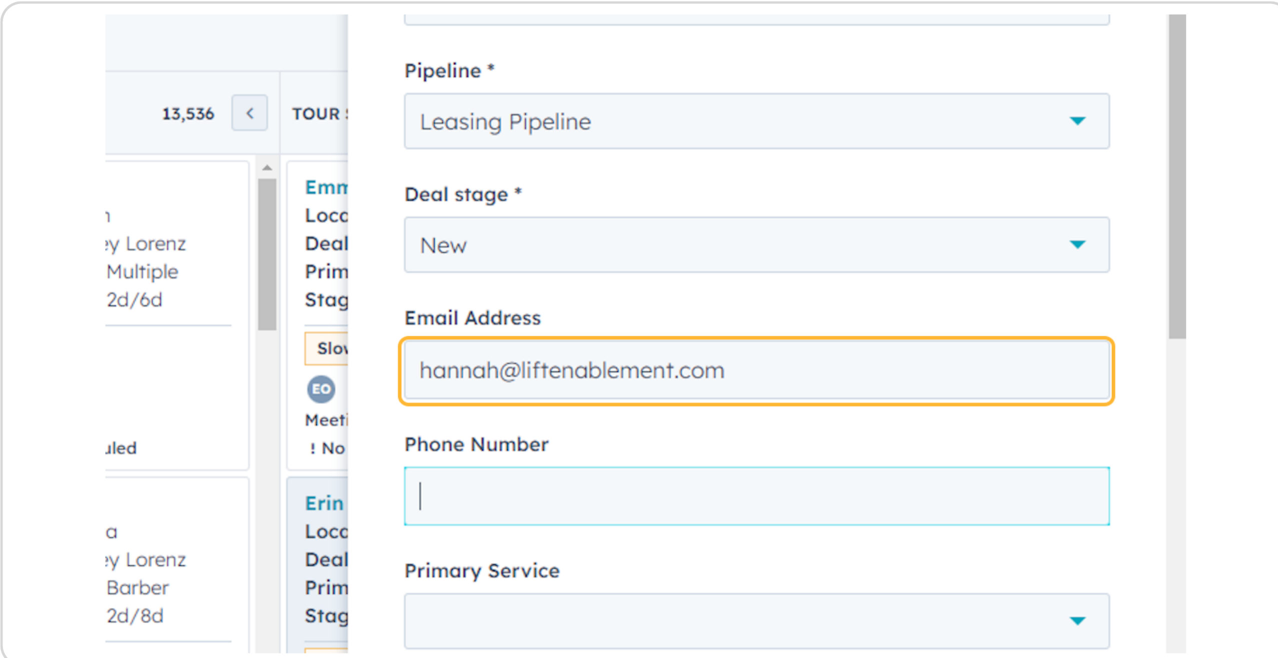
Include a Deal name

Note: The Deal should already be assigned to the active pipeline – Leasing Pipeline.



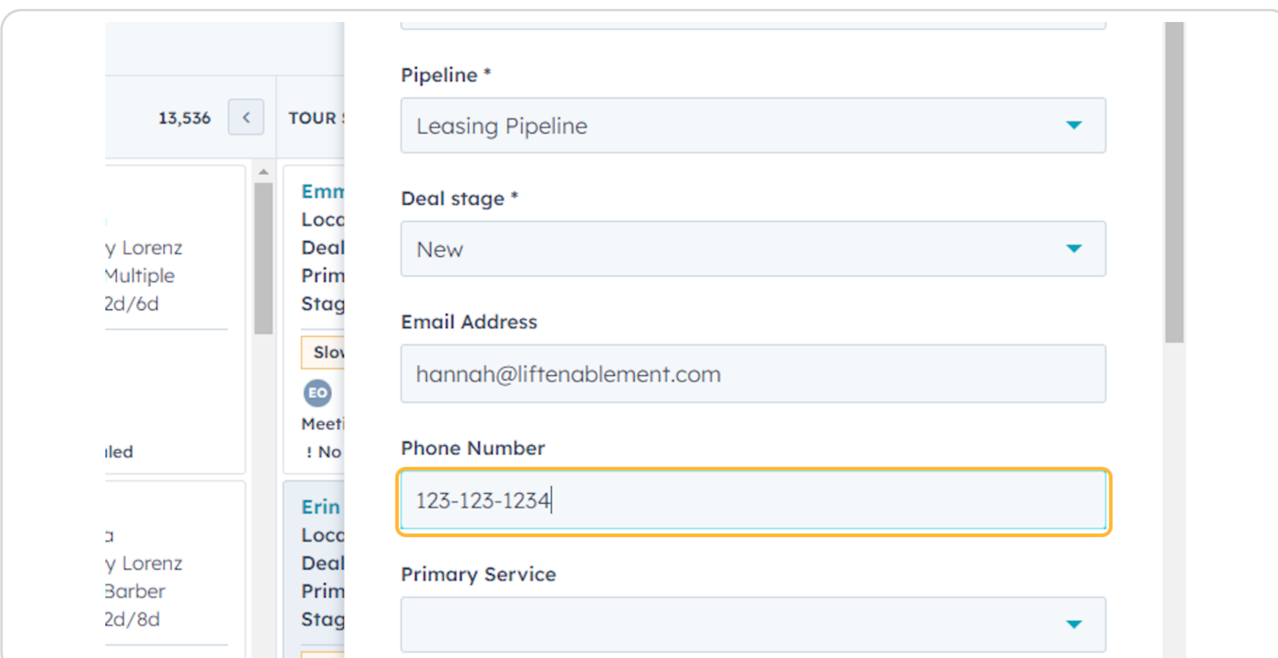
STEP 5

Include an Email Address



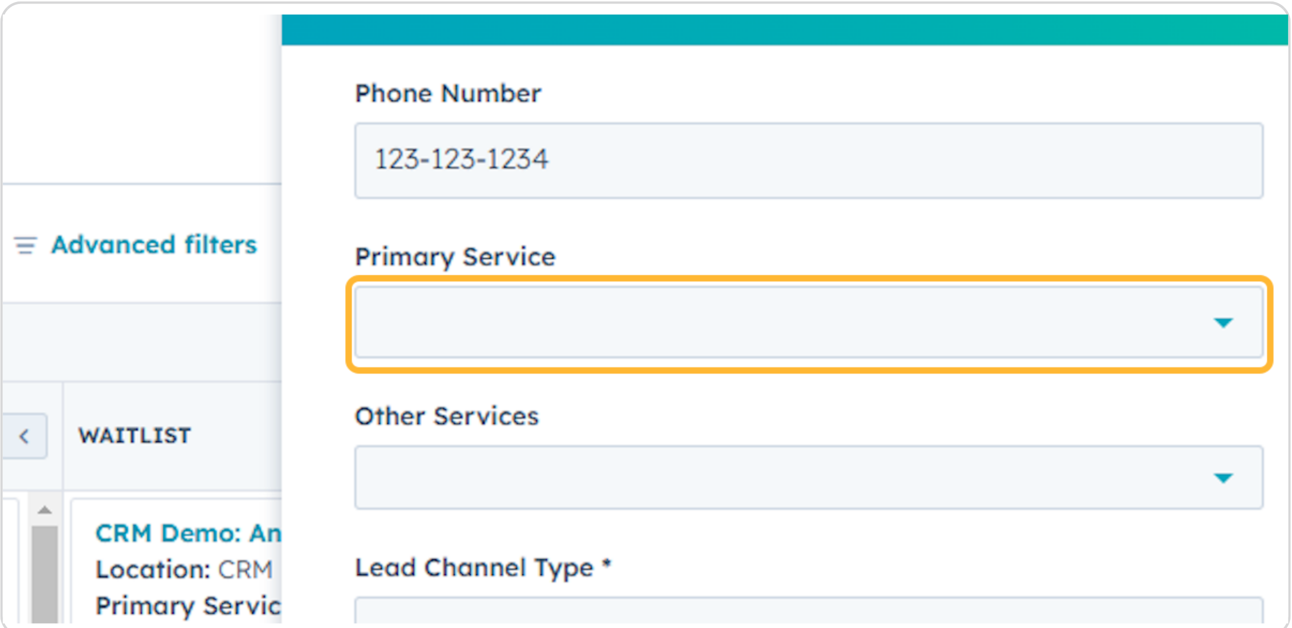
STEP 6

Include a Phone Number



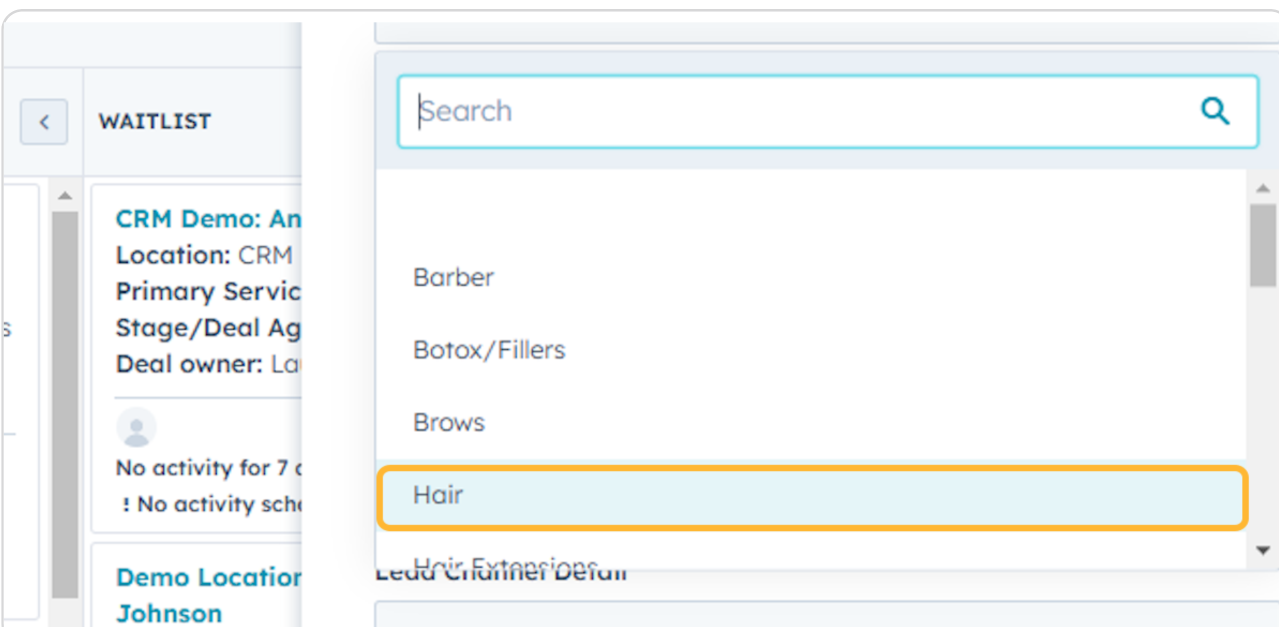
STEP 7

Select the Primary Service for the Deal



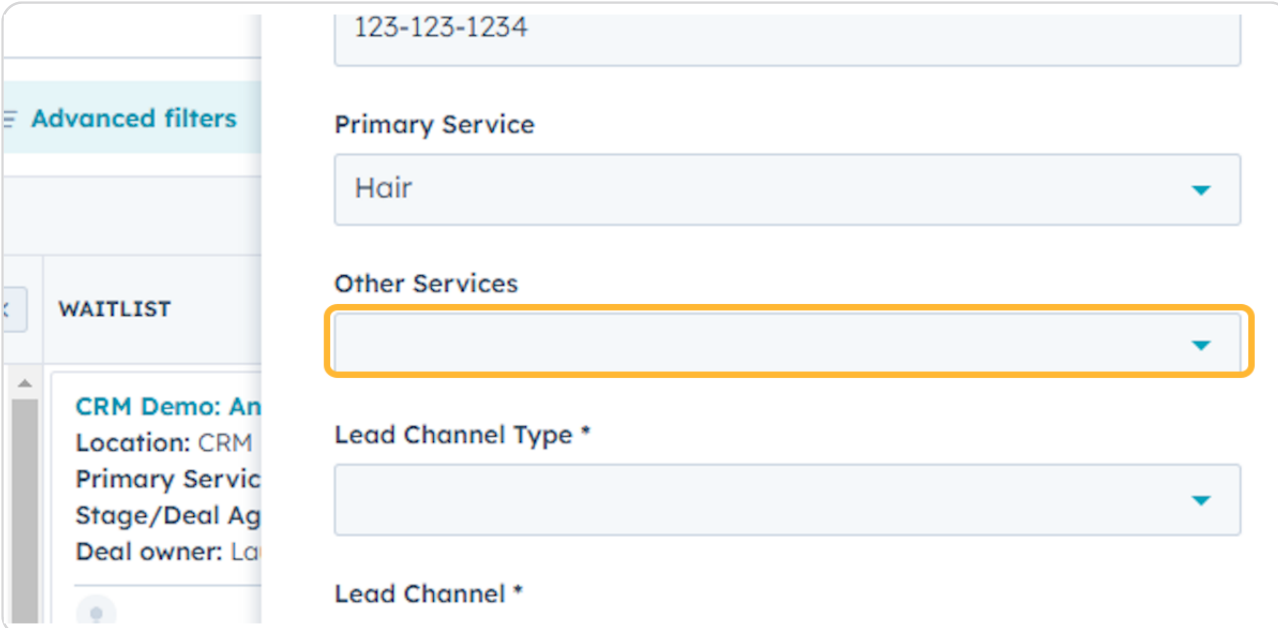
STEP 8

You can search for the Primary Service or you can scroll until you find the Primary Service



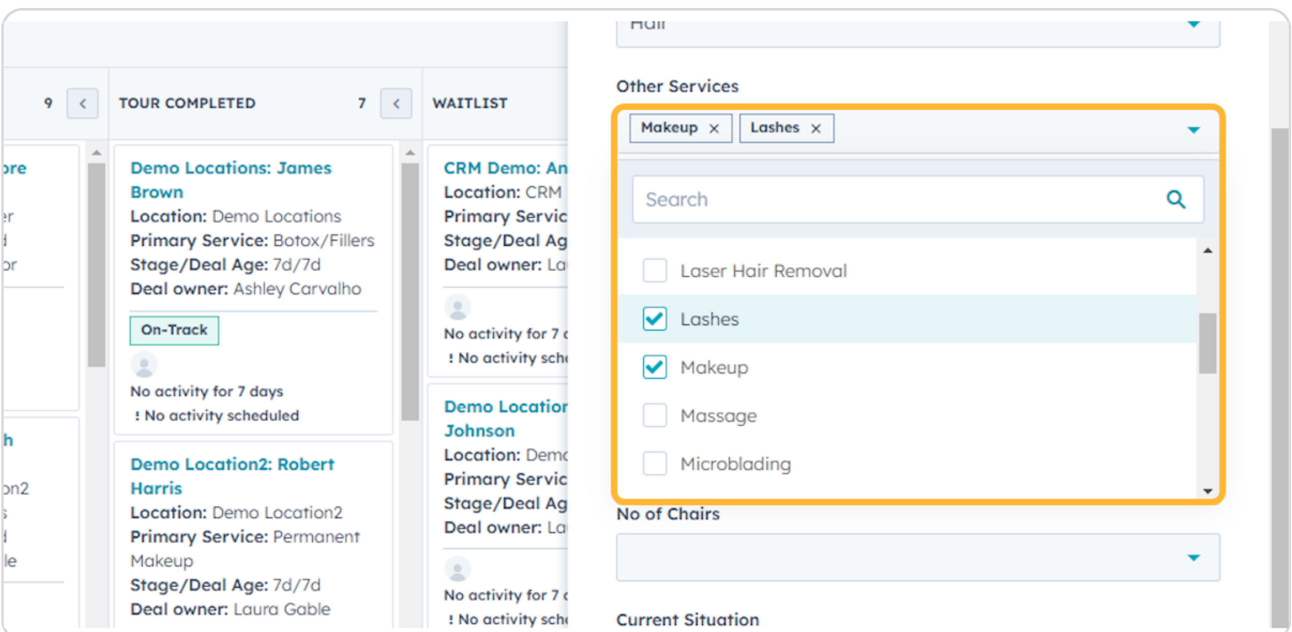
STEP 9

Include any Other Service (if applicable)



STEP 10

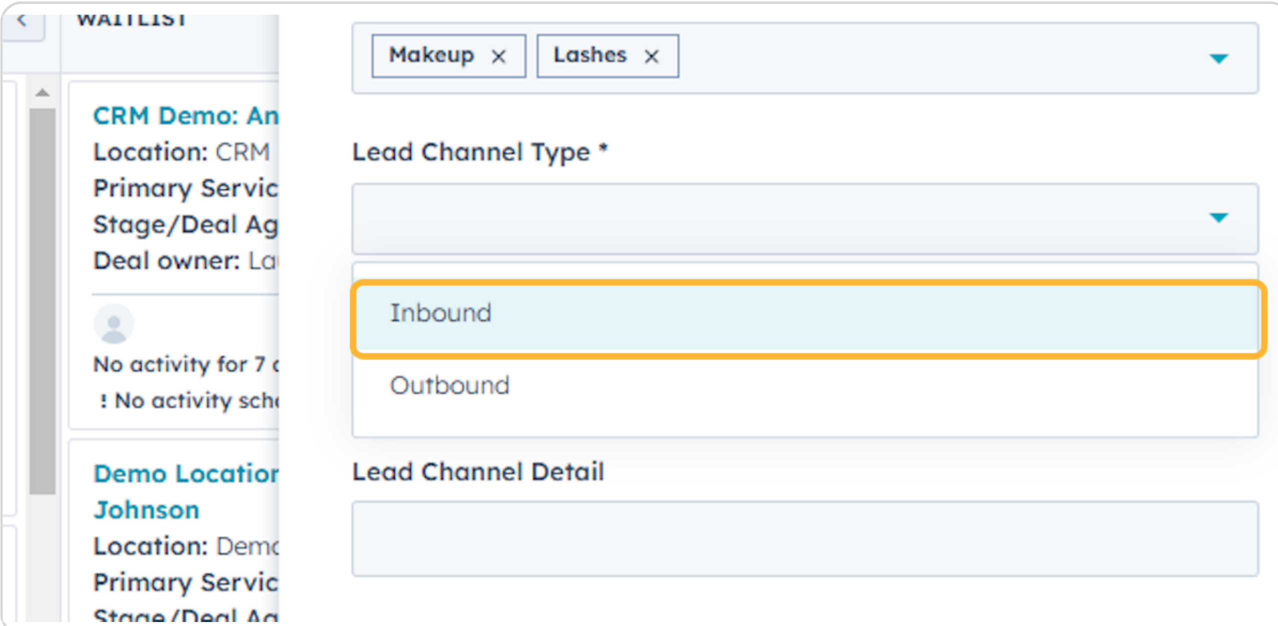
You can select one or multiple services here



STEP 11

Include the Lead Channe Type

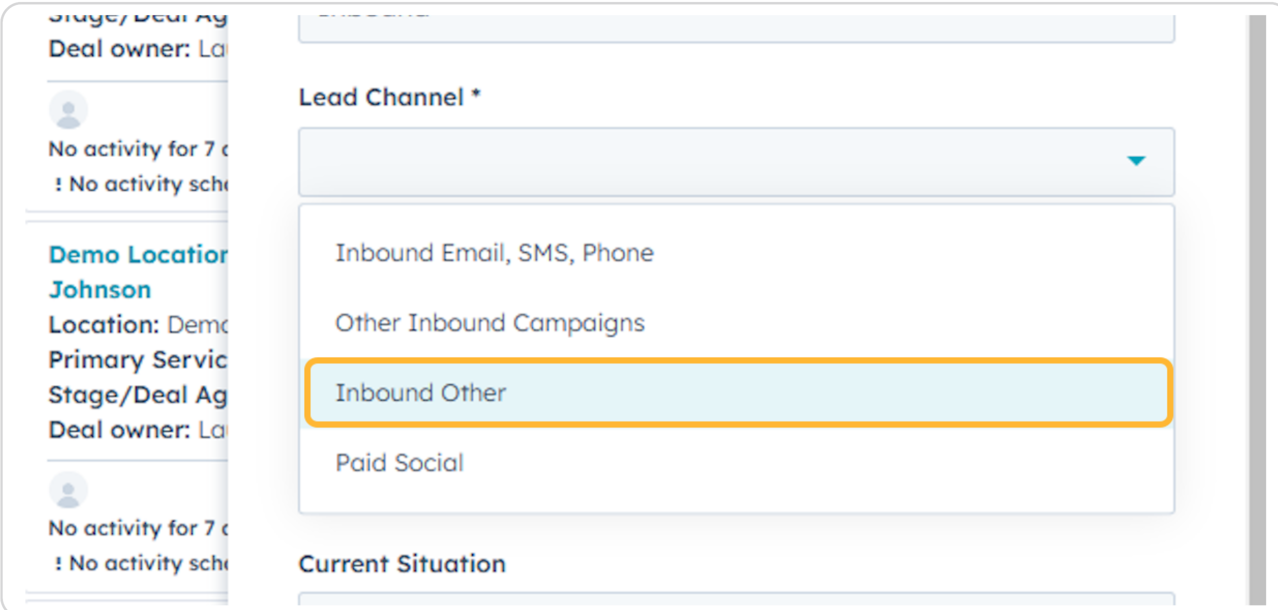
This could be Inbound or Outbound



STEP 12

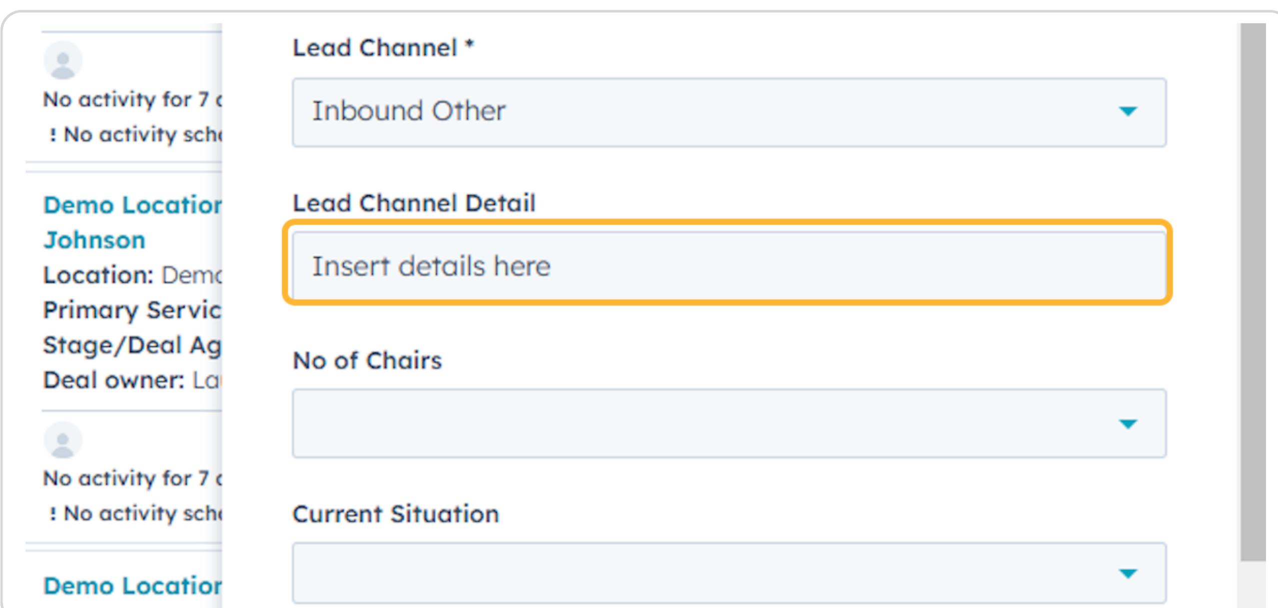
Select the Lead Channel

This could be Inbound Email, SMS, Phone, Other Inbound Campaigns, Inbound Other, or Paid Social.



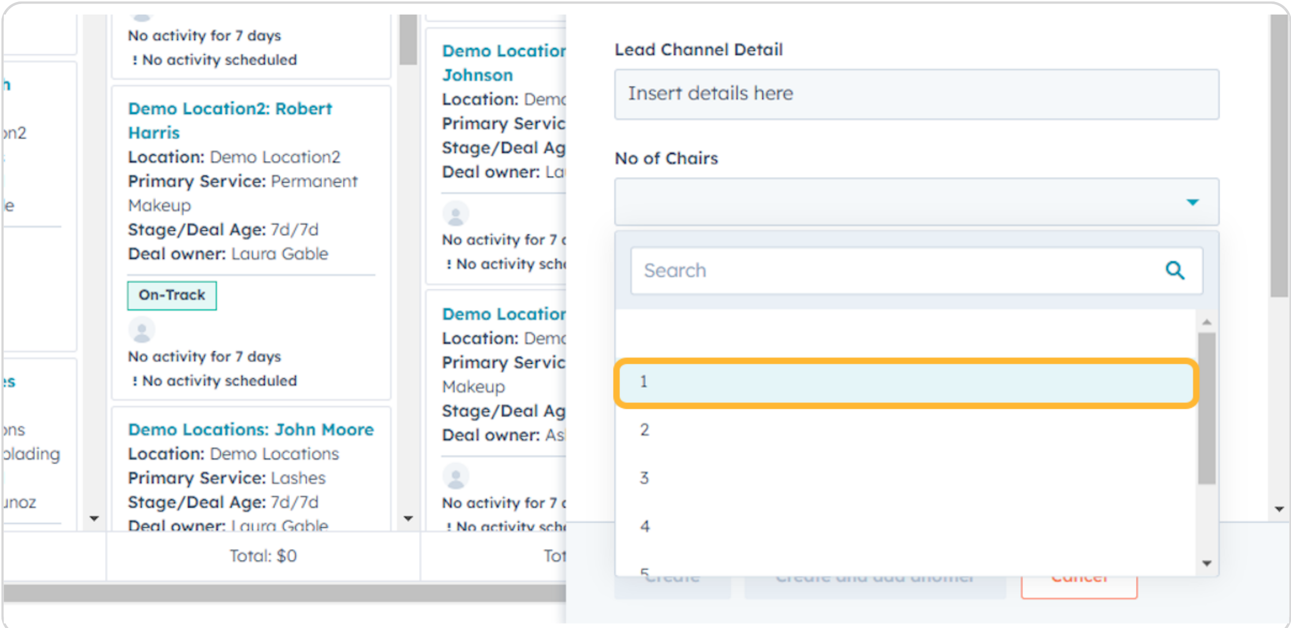
STEP 13

Insert any Lead Channel Details



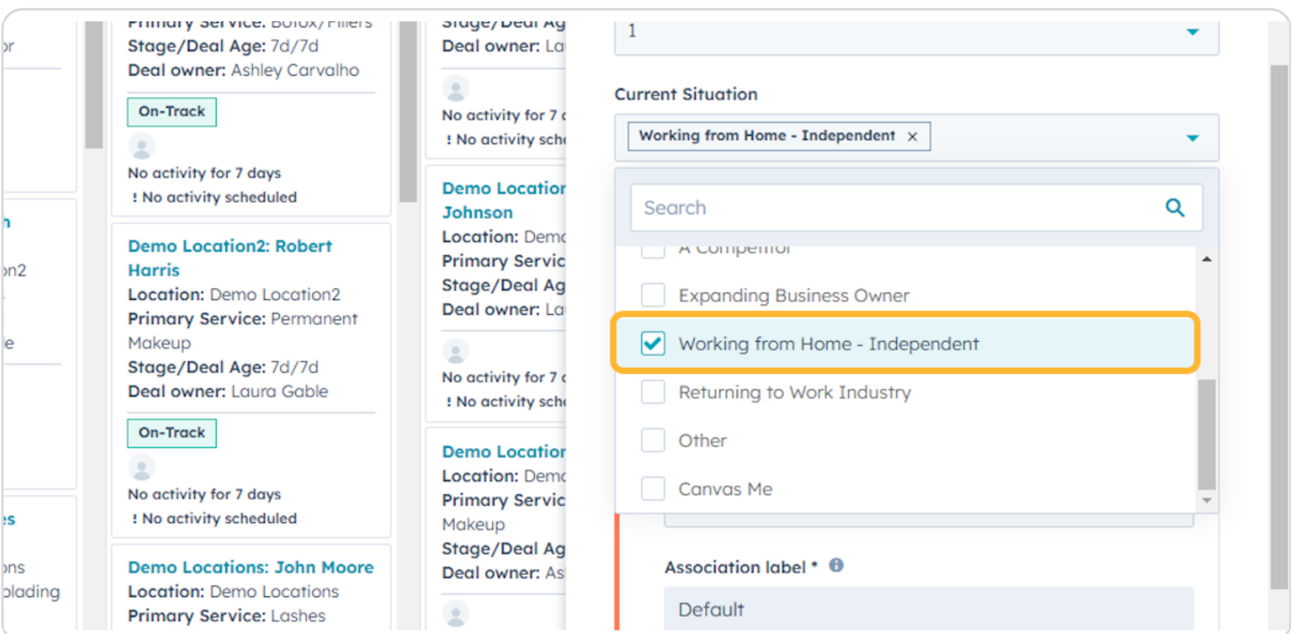
STEP 14

Choose the Number of Chairs



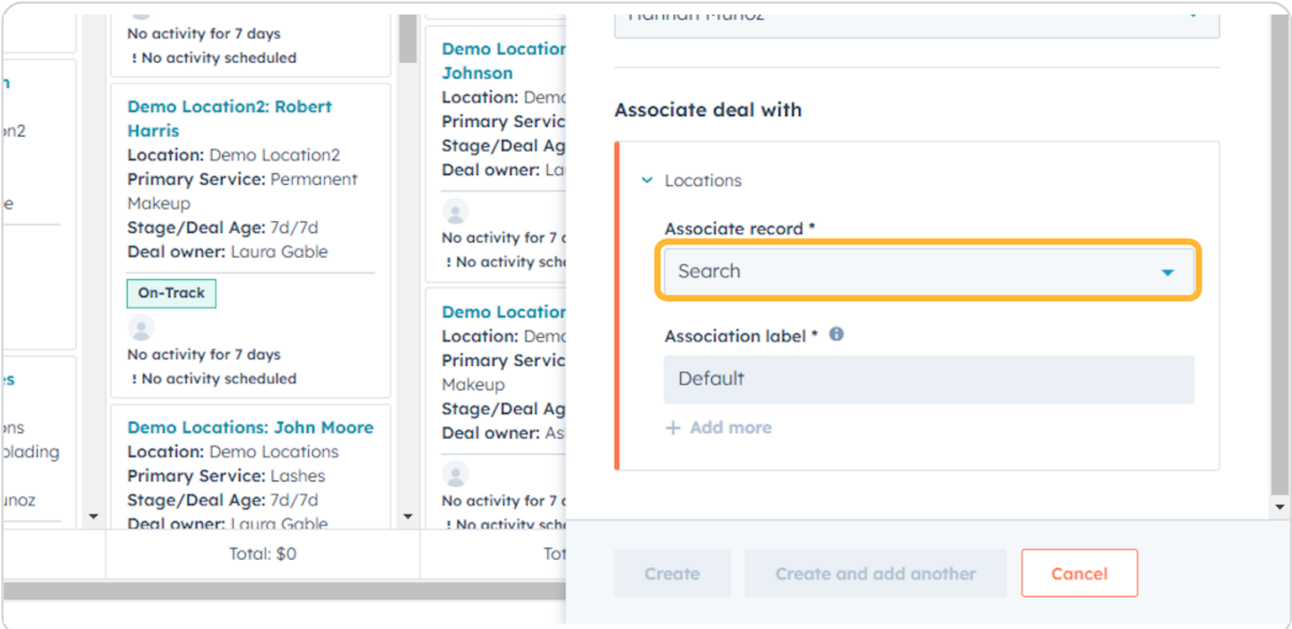
STEP 15

Choose the Current Situation



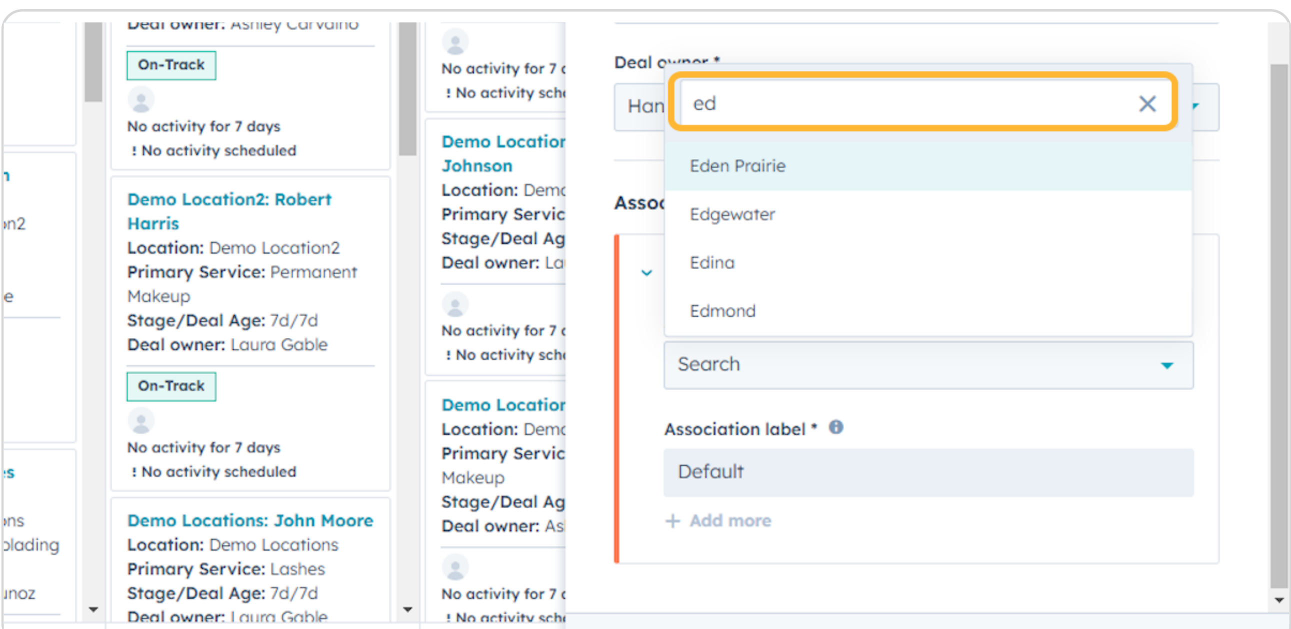
STEP 16

Select an Associated Location



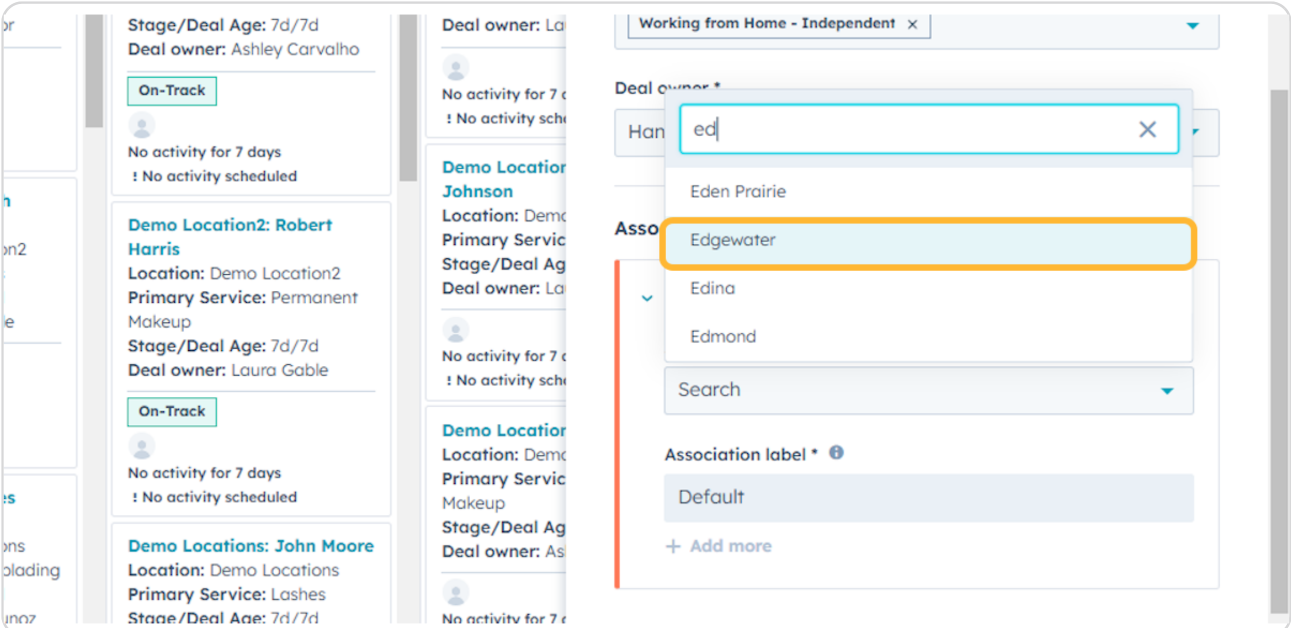
STEP 17

You can search for the location you're looking for



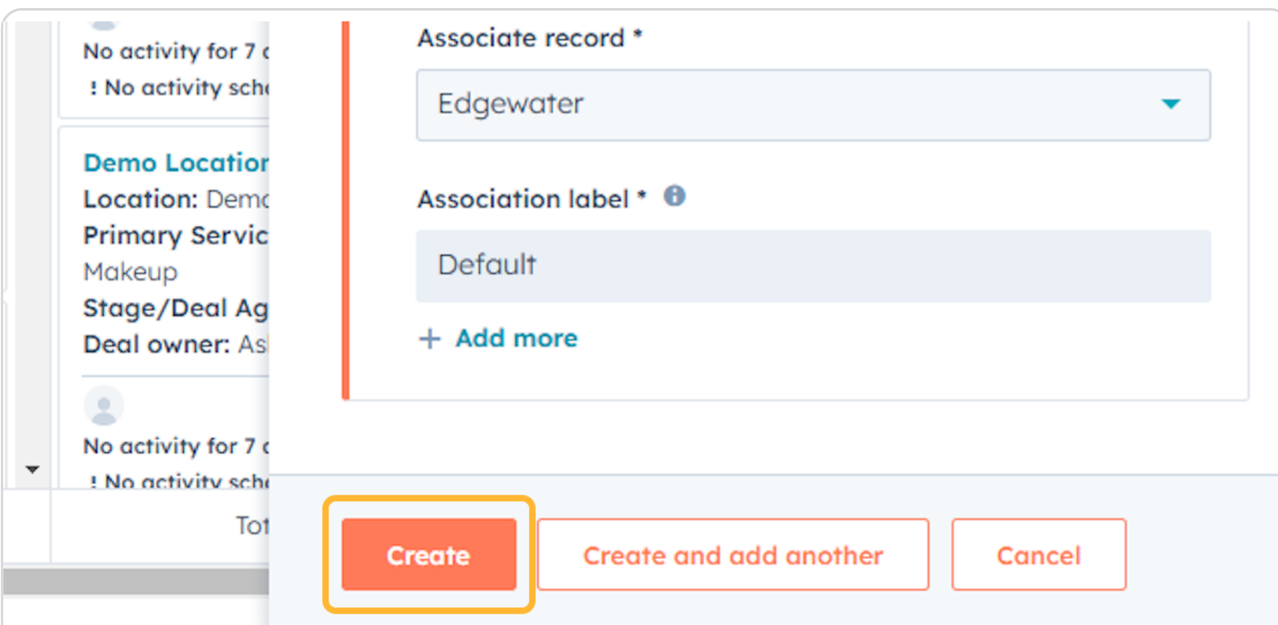
STEP 18

Select the Location



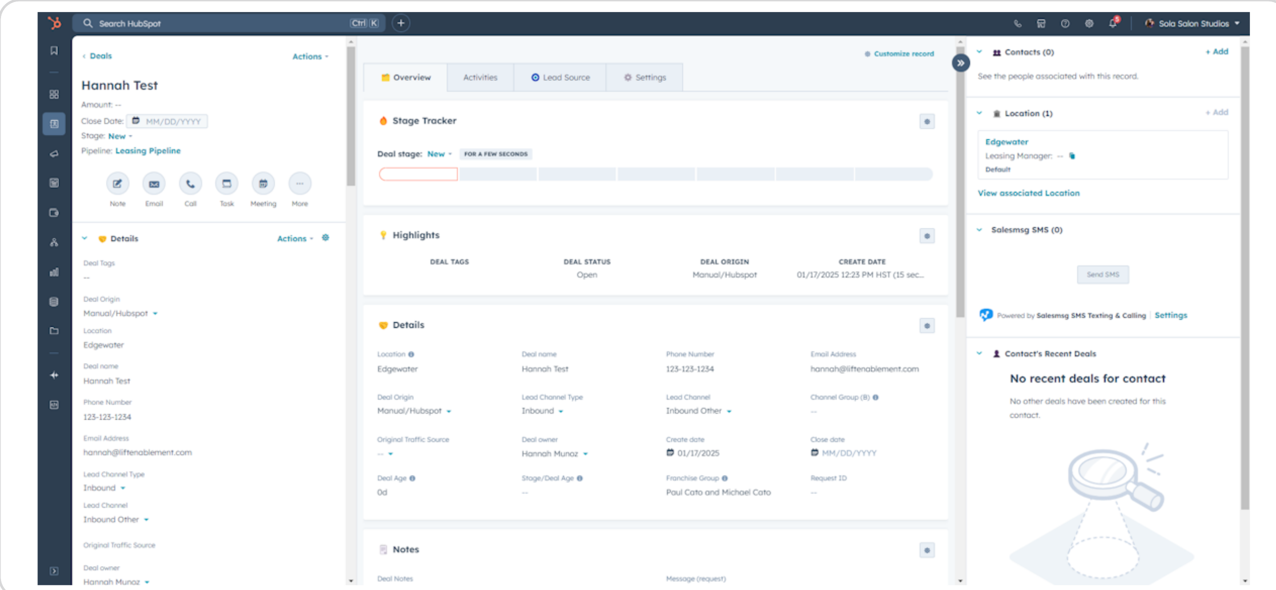
STEP 19

Click on Create



STEP 20

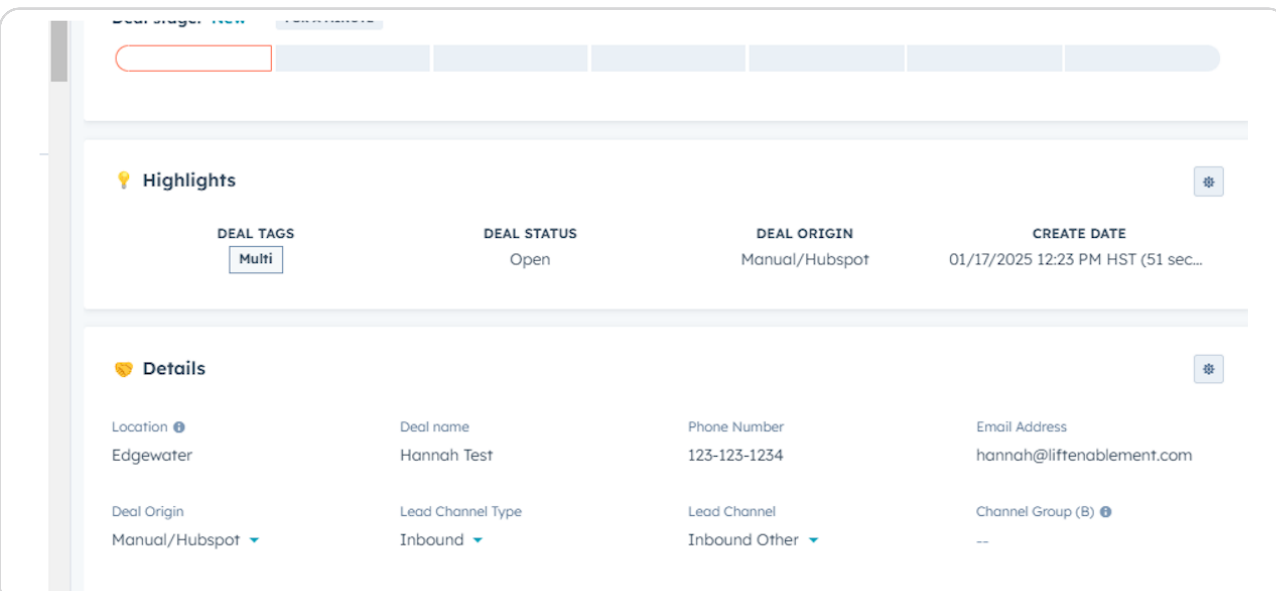
<u>Creating the Deal will take you into the Deal Record</u>



STEP 21

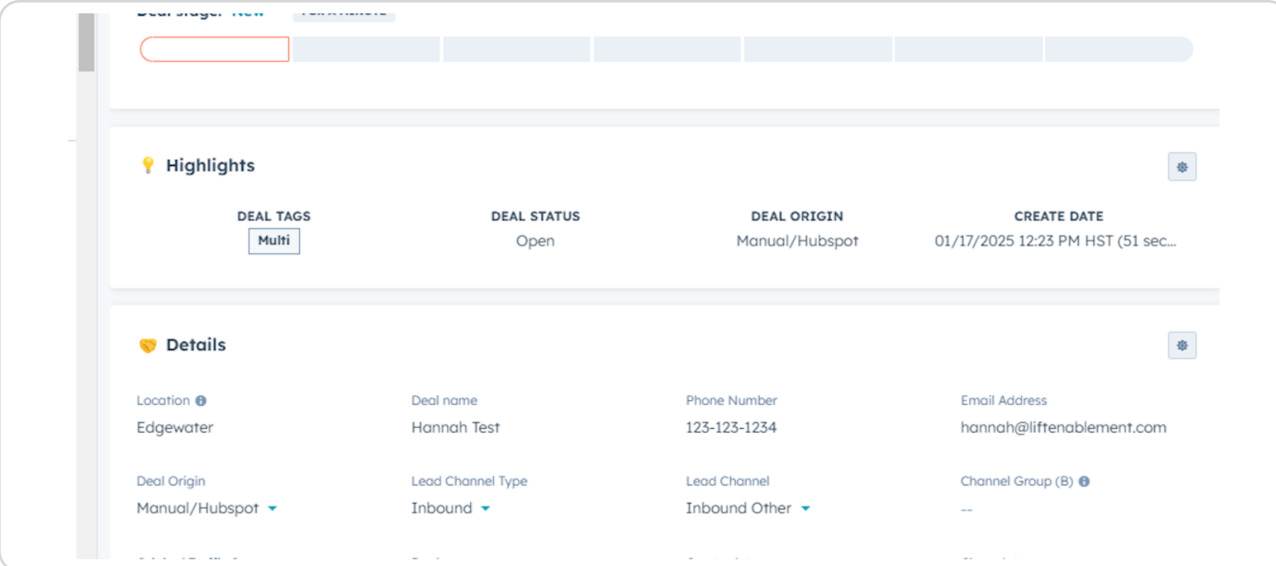
Refresh the page to see the Associated Pro under Contacts

In the background, there is logic that will kick off and search if a Contact is already associated based on the email address and phone number. If a Contact is found, they will be associated to the Deal and will be shared if it's across ownership groups.



STEP 22

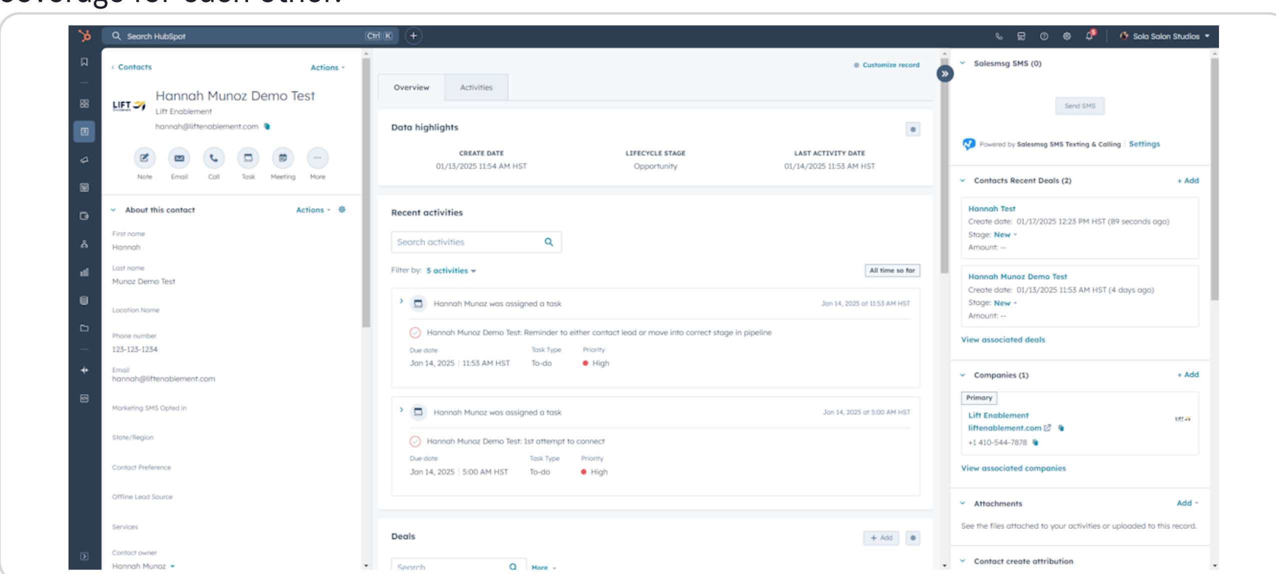
Access the Pro by Clicking on the Contact Name within the Deal



STEP 23

This will take you to the Contact Record

Note: If the Pro is a shared contact you'll be able to see the Contact's About Information, but you will not be able to see another operator's notes associated. This is to maintain privacy if the Deal is with another franchise operating group. Any leasing managers within the same operating group will have access to each others Deals, Activities, and Notes to support coverage for each other.



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