

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.

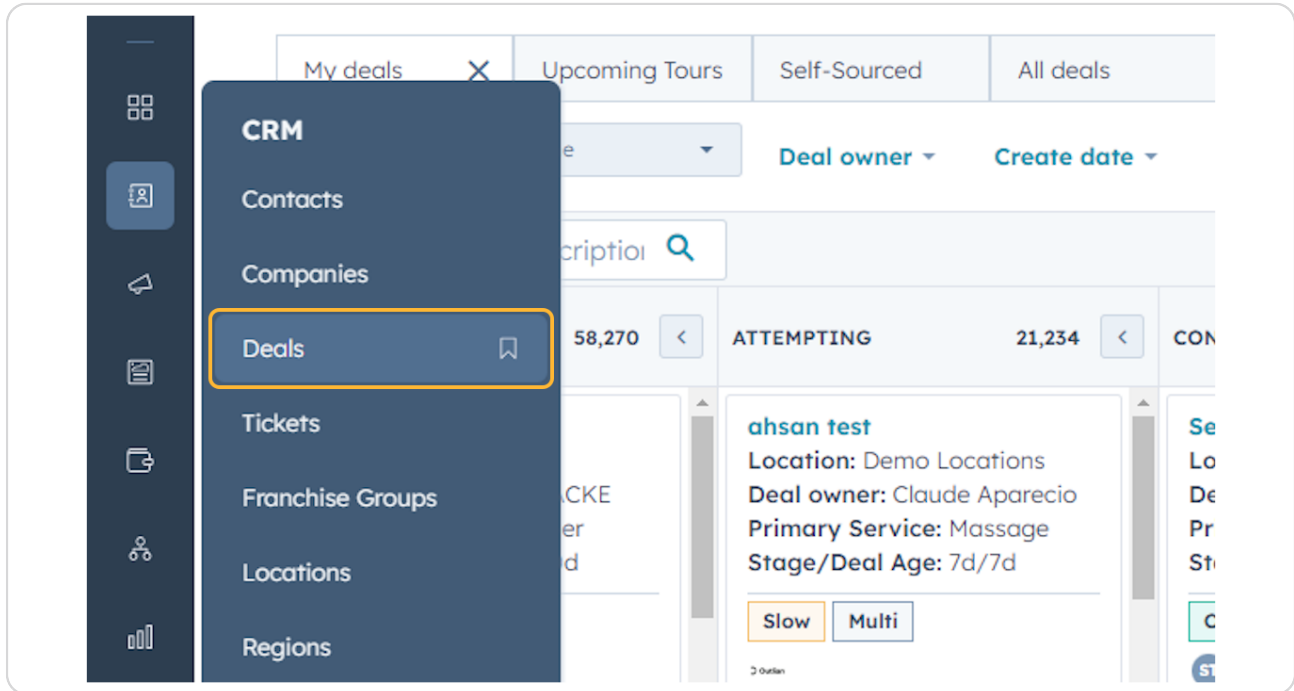
23 Steps [View most recent version](#) 

| | | |
|---------------|---------------|--------------|
| Created by | Creation Date | Last Updated |
| Doug Davidoff | Nov 08, 2024 | Jan 17, 2025 |

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

The screenshot displays the HubSpot Deals index page. At the top, there's a navigation bar with 'Search HubSpot', 'My deals', and buttons for 'Actions', 'Import', and 'Create deal'. Below this, a filter bar shows 'All deals', 'My deals', and '+ Add view (2/50)'. The main content area is divided into columns representing different deal stages: NEW (3), CONNECTING (2), CONNECTED (2), TOUR SCHEDULED (9), TOUR COMPLETED (7), WAITLIST (3), CLOSED LEASED (4), and CLOSED/NURTURE (4). Each column contains a list of deals with details like location, primary service, stage/deal age, and deal owner. A sidebar on the left shows filters and a search bar. The bottom of the page shows a summary of the total value for each stage.

STEP 3

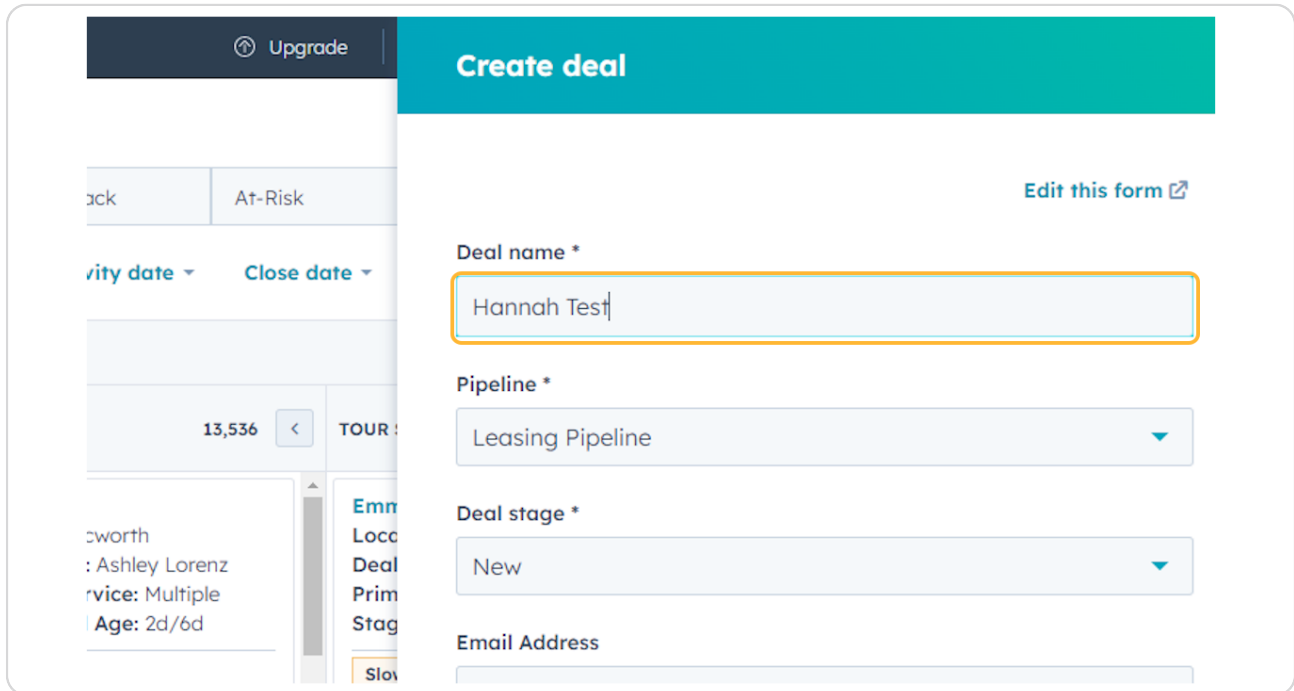
Click on Create deal

This screenshot shows a closer view of the HubSpot Deals index page. The top navigation bar includes icons for phone, calendar, help, settings, and a notification bell with 5 alerts. The 'Sola Salon Studios' logo is on the right. Below the navigation bar, there are buttons for 'Actions', 'Import', and 'Create deal'. The 'Create deal' button is highlighted with an orange border. Below this, the 'Advanced filters' section is visible, along with 'Create report' and 'Board options' buttons. The main content area shows the 'WAITLIST' stage with 3 deals. The first deal is 'CRM Demo: Anna Johnson'.

STEP 4

Include a Deal name

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



Upgrade

Create deal

Edit this form

Deal name *

Hannah Test

Pipeline *

Leasing Pipeline

Deal stage *

New

Email Address

Activity date Close date

13,536 TOUR

Emm
Loca
Deal
Prim
Stag
Slov

Sworth
: Ashley Lorenz
ervice: Multiple
Age: 2d/6d

STEP 5

Include an Email Address

13,536 < TOUR :

Emm
Locc
Deal
Prim
Stag

Slow

EO

Meeti
! No

Erin
Locc
Deal
Prim
Stag

1
y Lorenz
Multiple
2d/6d

aled

a
y Lorenz
Barber
2d/8d

Pipeline *

Leasing Pipeline

Deal stage *

New

Email Address

hannah@liftonenablement.com

Phone Number

Primary Service

STEP 6

Include a Phone Number

13,536 < TOUR :

Emm
Locc
Deal
Prim
Stag

Slow

EO

Meeti
! No

Erin
Locc
Deal
Prim
Stag

1
y Lorenz
Multiple
2d/6d

aled

a
y Lorenz
Barber
2d/8d

Pipeline *

Leasing Pipeline

Deal stage *

New

Email Address

hannah@liftonenablement.com

Phone Number

123-123-1234

Primary Service

STEP 7

Select the Primary Service for the Deal

The screenshot shows a CRM interface with a sidebar on the left and a main form area on the right. The sidebar includes a 'WAITLIST' button and a list of items, with 'CRM Demo: An' visible. The main form area has a teal header bar. Below the header, there are several fields: 'Phone Number' with the value '123-123-1234', 'Primary Service' (a dropdown menu highlighted with an orange border), 'Other Services' (a dropdown menu), and 'Lead Channel Type *' (a text input field).

STEP 8

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

The screenshot shows the same CRM interface as in Step 7, but with the 'Primary Service' dropdown menu open. At the top of the dropdown is a search bar with the placeholder text 'Search' and a magnifying glass icon. Below the search bar is a list of services: 'Barber', 'Botox/Fillers', 'Brows', 'Hair' (highlighted with an orange border), and 'Hair Extensions'. The sidebar on the left shows the 'WAITLIST' button and a list of items, with 'CRM Demo: An' visible. The main form area has a teal header bar.

STEP 9

Include any Other Service (if applicable)

123-123-1234

Advanced filters

Primary Service

Hair

Other Services

Lead Channel Type *

Lead Channel *

CRM Demo: An
Location: CRM
Primary Service
Stage/Deal Ag
Deal owner: La

WAITLIST

STEP 10

You can select one or multiple services here

TOUR COMPLETED

WAITLIST

Other Services

Makeup x Lashes x

Search

☐ Laser Hair Removal

☒ Lashes

☒ Makeup

☐ Massage

☐ Microblading

No of Chairs

Current Situation

Demo Locations: James Brown
Location: Demo Locations
Primary Service: Botox/Fillers
Stage/Deal Age: 7d/7d
Deal owner: Ashley Carvalho

On-Track

No activity for 7 days
! No activity scheduled

Demo Location2: Robert Harris
Location: Demo Location2
Primary Service: Permanent Makeup
Stage/Deal Age: 7d/7d
Deal owner: Laura Gable

CRM Demo: An
Location: CRM
Primary Service
Stage/Deal Ag
Deal owner: La

No activity for 7 c
! No activity sch

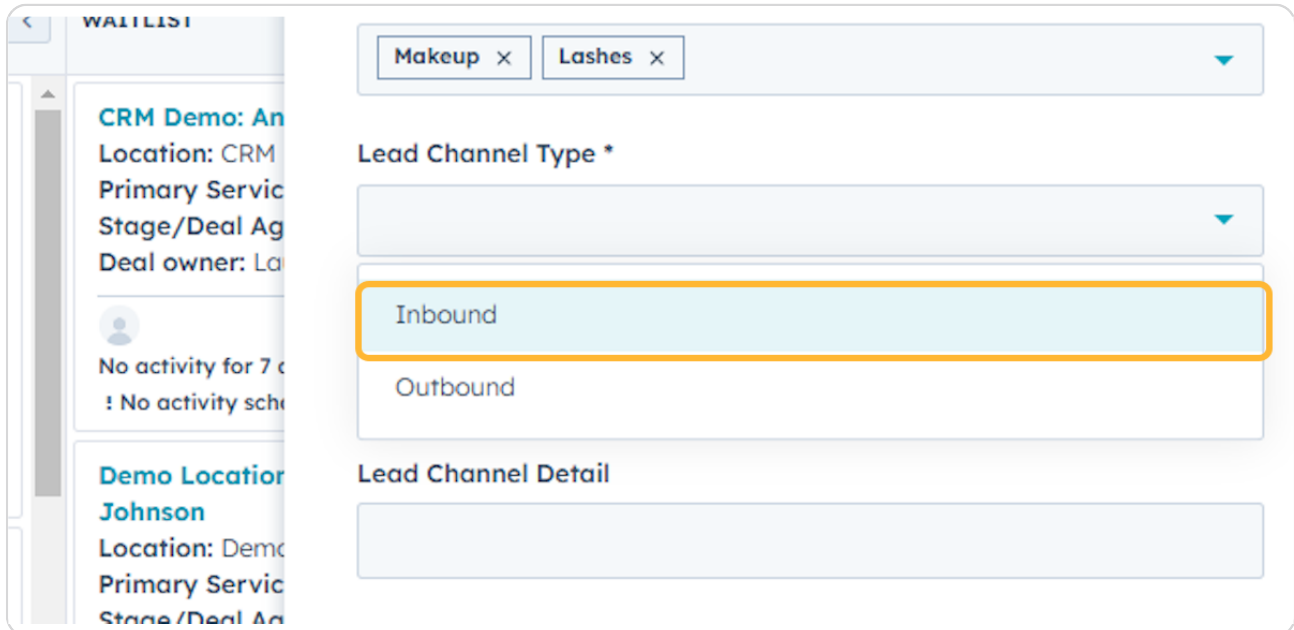
Demo Location
Johnson
Location: Dem
Primary Servic
Stage/Deal Ag
Deal owner: La

No activity for 7 c
! No activity sch

STEP 11

Include the Lead Channel Type

This could be Inbound or Outbound



The screenshot shows a CRM interface with a sidebar on the left and a main content area on the right. The sidebar contains a 'WAITLIST' section with a list of items, including 'CRM Demo: An', 'Location: CRM', 'Primary Service', 'Stage/Deal Ag', and 'Deal owner: La'. Below this is a section for 'Demo Location Johnson' with 'Location: Demo', 'Primary Service', and 'Stage/Deal Ag'. The main content area has a top bar with 'Makeup' and 'Lashes' tabs. Below this is a 'Lead Channel Type *' dropdown menu with 'Inbound' selected and highlighted by an orange border. Below the dropdown is a 'Lead Channel Detail' section with a text input field.

CRM Demo: An
Location: CRM
Primary Service
Stage/Deal Ag
Deal owner: La

No activity for 7 d
! No activity sche

Demo Location
Johnson
Location: Demo
Primary Service
Stage/Deal Ag

Makeup x Lashes x

Lead Channel Type *

Inbound

Outbound

Lead Channel Detail

STEP 12

Select the Lead Channel

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

The screenshot shows a user interface for selecting a lead channel. On the left, there is a sidebar with a list of items, each featuring a person icon, the text "No activity for 7 c", and "! No activity sche". One item is highlighted with a blue background and contains the text "Demo Location Johnson", "Location: Demo", "Primary Service", "Stage/Deal Ag", and "Deal owner: La". The main area on the right has a header "Lead Channel *" and a dropdown menu. The dropdown menu is open, showing five options: "Inbound Email, SMS, Phone", "Other Inbound Campaigns", "Inbound Other" (which is highlighted with an orange border), and "Paid Social". Below the dropdown menu, there is a section titled "Current Situation" with a dropdown menu that is currently closed.

STEP 13

Insert any Lead Channel Details

The screenshot shows the same user interface as in Step 12, but now the "Inbound Other" option is selected in the "Lead Channel *" dropdown menu. Below this, there is a section titled "Lead Channel Detail" with a text input field that contains the placeholder text "Insert details here" and is highlighted with an orange border. Below the text input field, there is a section titled "No of Chairs" with a dropdown menu that is currently closed. At the bottom, there is a section titled "Current Situation" with a dropdown menu that is currently closed.

STEP 14

Choose the Number of Chairs

The screenshot shows a software interface with a sidebar on the left containing 'Demo Location2: Robert Harris' and 'Demo Locations: John Moore'. The main area on the right is titled 'Lead Channel Detail' and 'No of Chairs'. The 'No of Chairs' dropdown menu is open, displaying a search bar and a list of numbers 1 through 5. The number 1 is highlighted with an orange box.

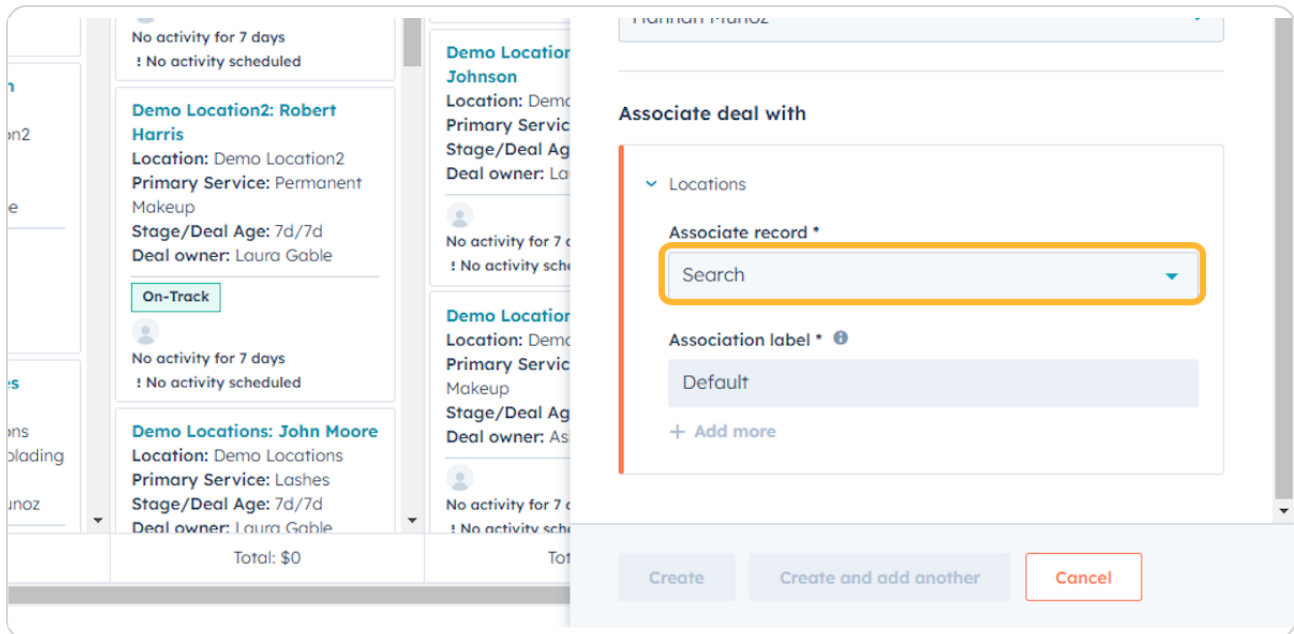
STEP 15

Choose the Current Situation

The screenshot shows a software interface with a sidebar on the left containing 'Demo Location2: Robert Harris' and 'Demo Locations: John Moore'. The main area on the right is titled 'Current Situation'. The 'Current Situation' dropdown menu is open, displaying a search bar and a list of options: 'Working from Home - Independent', 'A Competitor', 'Expanding Business Owner', 'Returning to Work Industry', 'Other', and 'Canvas Me'. The 'Working from Home - Independent' option is highlighted with an orange box.

STEP 16

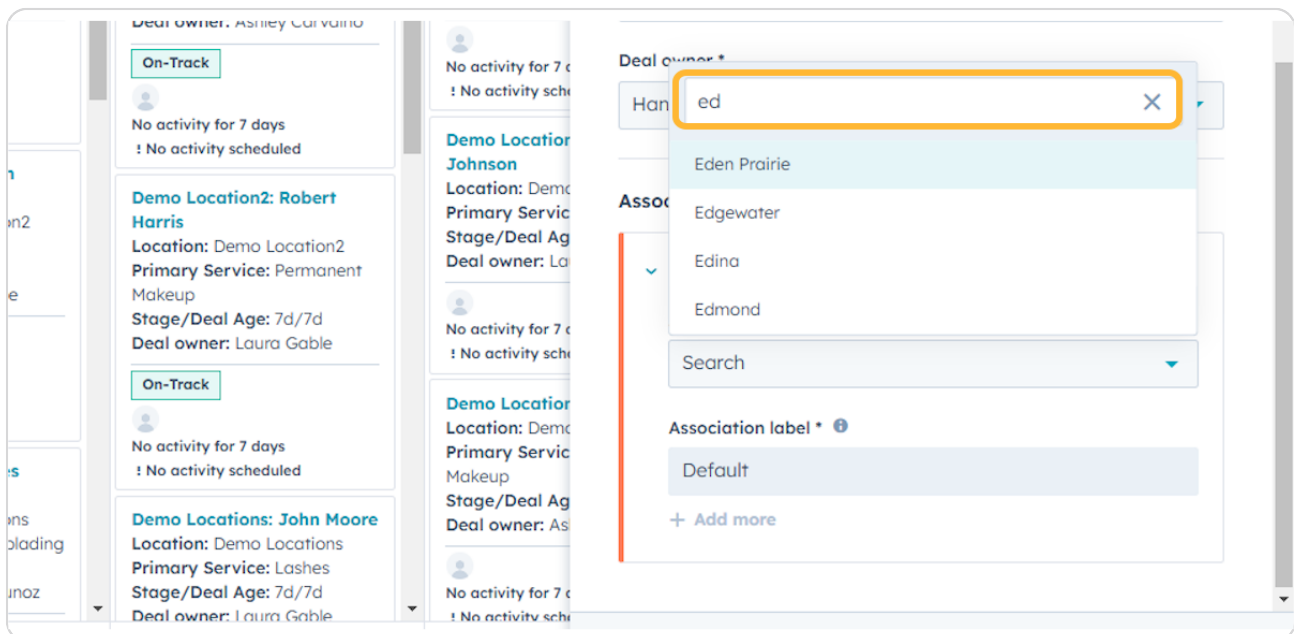
Select an Associated Location



The screenshot shows the LIFT software interface. On the left, there is a list of locations and services. The main panel on the right is titled 'Associate deal with'. It has a section for 'Locations' which is expanded. Below this, there is a dropdown menu for 'Associate record *' which is open, showing a search bar. Below the search bar, there is a text field for 'Association label *' with the value 'Default'. At the bottom of the dialog, there are three buttons: 'Create', 'Create and add another', and 'Cancel'.

STEP 17

You can search for the location you're looking for



The screenshot shows the LIFT software interface. On the left, there is a list of locations and services. The main panel on the right is titled 'Associate deal with'. It has a section for 'Locations' which is expanded. Below this, there is a dropdown menu for 'Associate record *' which is open, showing a search bar. Below the search bar, there is a text field for 'Association label *' with the value 'Default'. At the bottom of the dialog, there are three buttons: 'Create', 'Create and add another', and 'Cancel'.

STEP 18

Select the Location

Stage/Deal Age: 7d/7d
Deal owner: Ashley Carvalho
On-Track
No activity for 7 days
! No activity scheduled

Demo Location2: Robert Harris
Location: Demo Location2
Primary Service: Permanent Makeup
Stage/Deal Age: 7d/7d
Deal owner: Laura Gable
On-Track
No activity for 7 days
! No activity scheduled

Demo Locations: John Moore
Location: Demo Locations
Primary Service: Lashes
Stage/Deal Age: 7d/7d

Deal owner: Laura Gable
No activity for 7 days
! No activity scheduled

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

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

Working from Home - Independent x

Deal owner: *
Han ed

Eden Prairie
Edgewater
Edina
Edmond

Search

Association label * ⓘ
Default
+ Add more

STEP 19

Click on Create

No activity for 7 days
! No activity scheduled

Demo Location Johnson
Location: Demo Location
Primary Service: Permanent Makeup
Stage/Deal Age: 7d/7d
Deal owner: Ashley Carvalho
No activity for 7 days
! No activity scheduled

Associate record *
Edgewater

Association label * ⓘ
Default
+ Add more

Create Create and add another Cancel

STEP 20

Creating the Deal will take you into the Deal Record

The screenshot shows the HubSpot Deal Record interface for a deal named 'Hannah Test'. The left sidebar contains navigation links for Deals, Details, and various actions like Note, Email, Call, Task, Meeting, and More. The main content area is divided into several sections: Overview, Stage Tracker, Highlights, Details, and Notes. The Stage Tracker shows the deal stage as 'New' with a 'FOR A FEW SECONDS' label. The Highlights section displays key deal information in a table format. The Details section provides a comprehensive view of the deal's attributes, including location, name, phone number, email address, deal origin, lead channel type, lead channel, channel group, create date, close date, deal age, stage/deal age, franchise group, and request ID. The right sidebar shows the 'Contacts (0)' section, indicating no contacts are currently associated with this deal. Below this, there is a 'Salesmsg SMS (0)' section with a 'Send SMS' button, and a 'Contact's Recent Deals' section stating 'No recent deals for contact'.

| DEAL TAGS | DEAL STATUS | DEAL ORIGIN | CREATE DATE |
|-----------|-------------|----------------|------------------------------------|
| Multi | Open | Manual/Hubspot | 01/17/2025 12:23 PM HST (15 sec... |

| Location | Deal name | Phone Number | Email Address |
|-----------|-------------|--------------|--------------------------|
| Edgewater | Hannah Test | 123-123-1234 | hannah@liffenabement.com |

| Deal Origin | Lead Channel Type | Lead Channel | Channel Group (B) |
|----------------|-------------------|---------------|-------------------|
| Manual/Hubspot | Inbound | Inbound Other | -- |

| Create date | Close date | Deal Age | Stage/Deal Age | Franchise Group | Request ID |
|-------------|------------|----------|----------------|----------------------------|------------|
| 01/17/2025 | MM/DD/YYYY | 0d | -- | Paul Cato and Michael Cato | -- |

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.

This close-up screenshot focuses on the 'Highlights' and 'Details' sections of the Deal Record. The 'Highlights' section shows the deal tags as 'Multi', the status as 'Open', the origin as 'Manual/Hubspot', and the creation date as '01/17/2025 12:23 PM HST (51 sec...)'. The 'Details' section provides a structured view of the deal's information, organized into four columns: Location, Deal name, Phone Number, and Email Address. Below this, another row of details includes Deal Origin, Lead Channel Type, Lead Channel, and Channel Group (B). The 'Details' section also includes a 'Deal Age' of '0d' and a 'Stage/Deal Age' of '--'.

| DEAL TAGS | DEAL STATUS | DEAL ORIGIN | CREATE DATE |
|-----------|-------------|----------------|-------------------------------------|
| Multi | Open | Manual/Hubspot | 01/17/2025 12:23 PM HST (51 sec...) |

| Location | Deal name | Phone Number | Email Address |
|-----------|-------------|--------------|--------------------------|
| Edgewater | Hannah Test | 123-123-1234 | hannah@liffenabement.com |

| Deal Origin | Lead Channel Type | Lead Channel | Channel Group (B) |
|----------------|-------------------|---------------|-------------------|
| Manual/Hubspot | Inbound | Inbound Other | -- |

| Create date | Close date | Deal Age | Stage/Deal Age | Franchise Group | Request ID |
|-------------|------------|----------|----------------|----------------------------|------------|
| 01/17/2025 | MM/DD/YYYY | 0d | -- | Paul Cato and Michael Cato | -- |

STEP 22

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

The screenshot shows a 'Deal' record in HubSpot CRM. At the top, there's a search bar and a navigation bar. Below that, the 'Highlights' section displays key deal information: DEAL TAGS (Multi), DEAL STATUS (Open), DEAL ORIGIN (Manual/Hubspot), and CREATE DATE (01/17/2025 12:23 PM HST (51 sec...)). The 'Details' section below provides more specific information: Location (Edgewater), Deal name (Hannah Test), Phone Number (123-123-1234), Email Address (hannah@liffenablement.com), Deal Origin (Manual/Hubspot), Lead Channel Type (Inbound), Lead Channel (Inbound Other), and Channel Group (B).

| Highlights | |
|-------------|-------------------------------------|
| DEAL TAGS | Multi |
| DEAL STATUS | Open |
| DEAL ORIGIN | Manual/Hubspot |
| CREATE DATE | 01/17/2025 12:23 PM HST (51 sec...) |

| Details | | | |
|----------------|-------------------|---------------|---------------------------|
| Location | Deal name | Phone Number | Email Address |
| Edgewater | Hannah Test | 123-123-1234 | hannah@liffenablement.com |
| Deal Origin | Lead Channel Type | Lead Channel | Channel Group (B) |
| Manual/Hubspot | Inbound | Inbound Other | -- |

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.

The screenshot shows a 'Contact' record for 'Hannah Munoz Demo Test' in HubSpot CRM. The left sidebar contains navigation links and contact information. The main content area is divided into three sections: 'Overview' (showing data highlights like CREATE DATE, LIFECYCLE STAGE, and LAST ACTIVITY DATE), 'Activities' (showing recent activities with search and filter options), and 'Deals' (showing a list of deals). The right sidebar contains additional information like 'Salesmsg SMS', 'Recent Deals', 'Companies', and 'Attachments'.

Contact Information:

- First name: Hannah
- Last name: Munoz Demo Test
- Location Name: Edgewater
- Phone number: 123-123-1234
- Email: hannah@liffenablement.com
- Marketing SMS Opted in: Yes
- State/Region: --
- Contact Preference: --
- Offline Lead Source: --
- Services: --
- Contact owner: Hannah Munoz

Overview Data Highlights:

- CREATE DATE: 01/15/2025 11:54 AM HST
- LIFECYCLE STAGE: Opportunity
- LAST ACTIVITY DATE: 01/14/2025 11:55 AM HST

Recent Activities:

- Hannah Munoz was assigned a task (Jan 14, 2025 at 11:55 AM HST)
- Hannah Munoz Demo Test: Reminder to either contact lead or move into correct stage in pipeline (Jan 14, 2025 at 11:55 AM HST, Task Type: To-do, Priority: High)
- Hannah Munoz was assigned a task (Jan 14, 2025 at 5:00 AM HST)
- Hannah Munoz Demo Test: 1st attempt to connect (Jan 14, 2025 at 5:00 AM HST, Task Type: To-do, Priority: High)

Deals:

- Search: [Search] More

