

Sola Salon Studios - Contact Record Overview

Contacts represent a Pro in your CRM. This guide is a general overview of the Contact Record layout and the different ways you can access these records. In this guide, we'll walk you through:

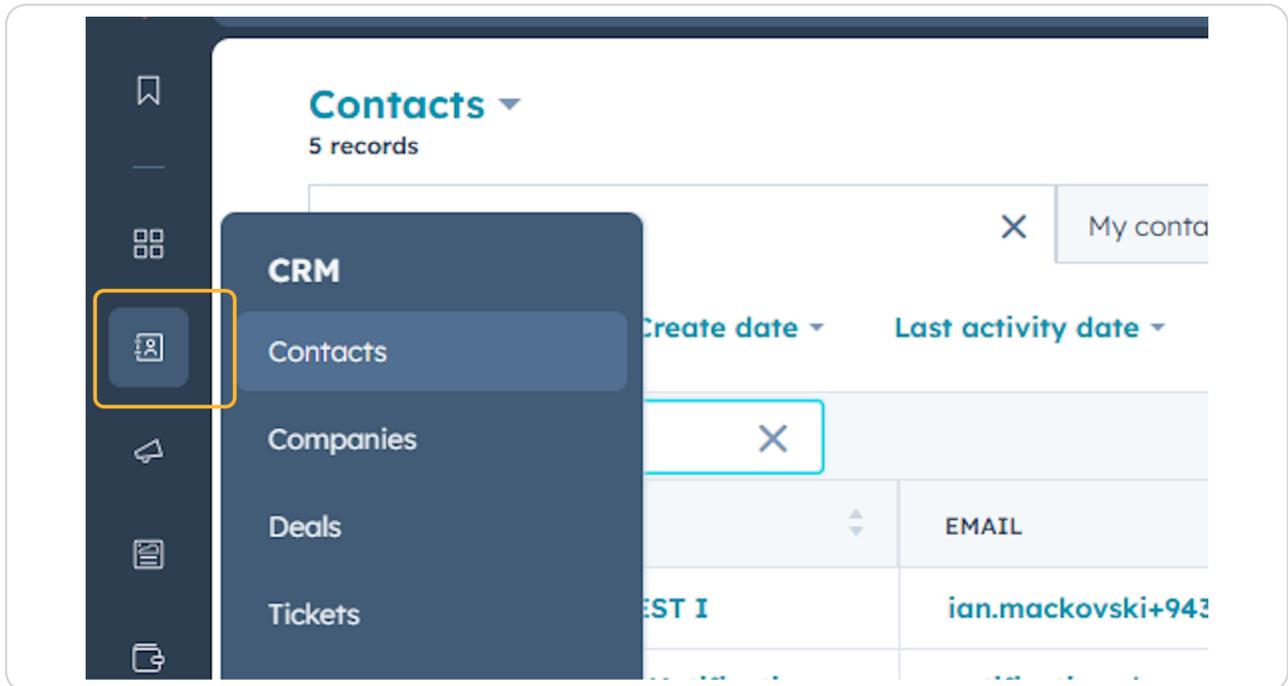
- How to access Contacts
- An overview of the layout and structure of the Contact Record

27 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Doug Davidoff	Dec 04, 2024	Jan 13, 2025

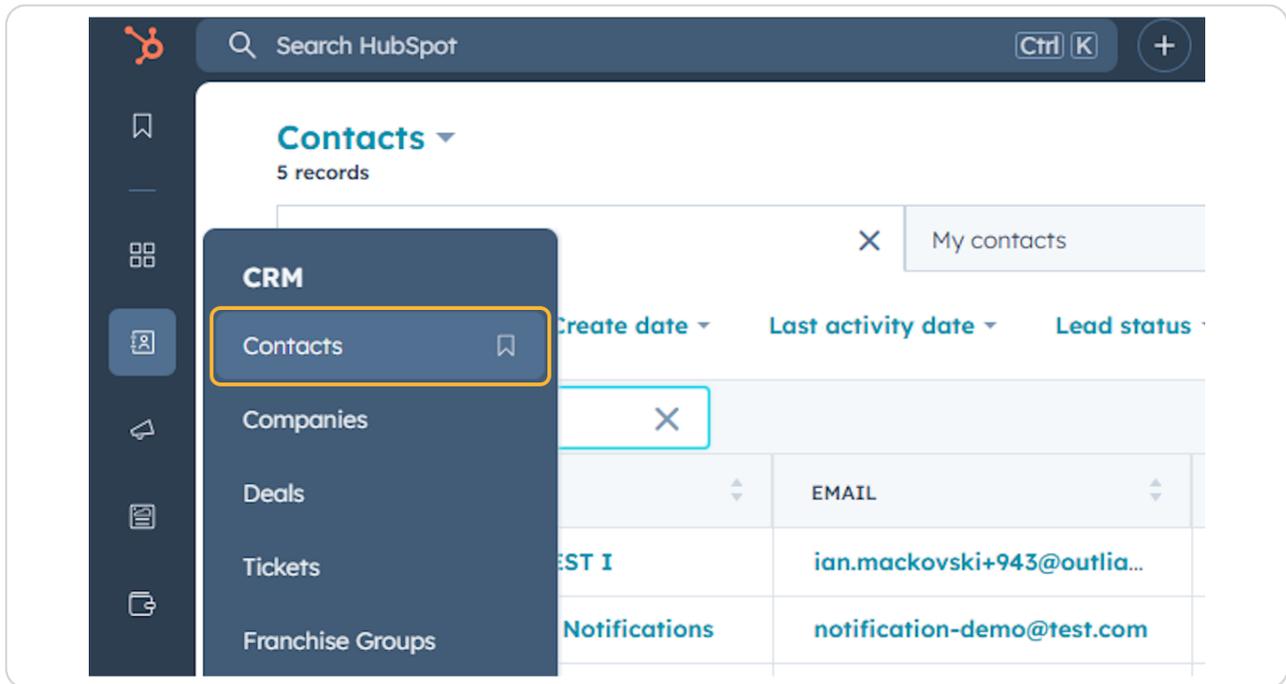
STEP 1

Click on the CRM menu item on the left-hand navigation



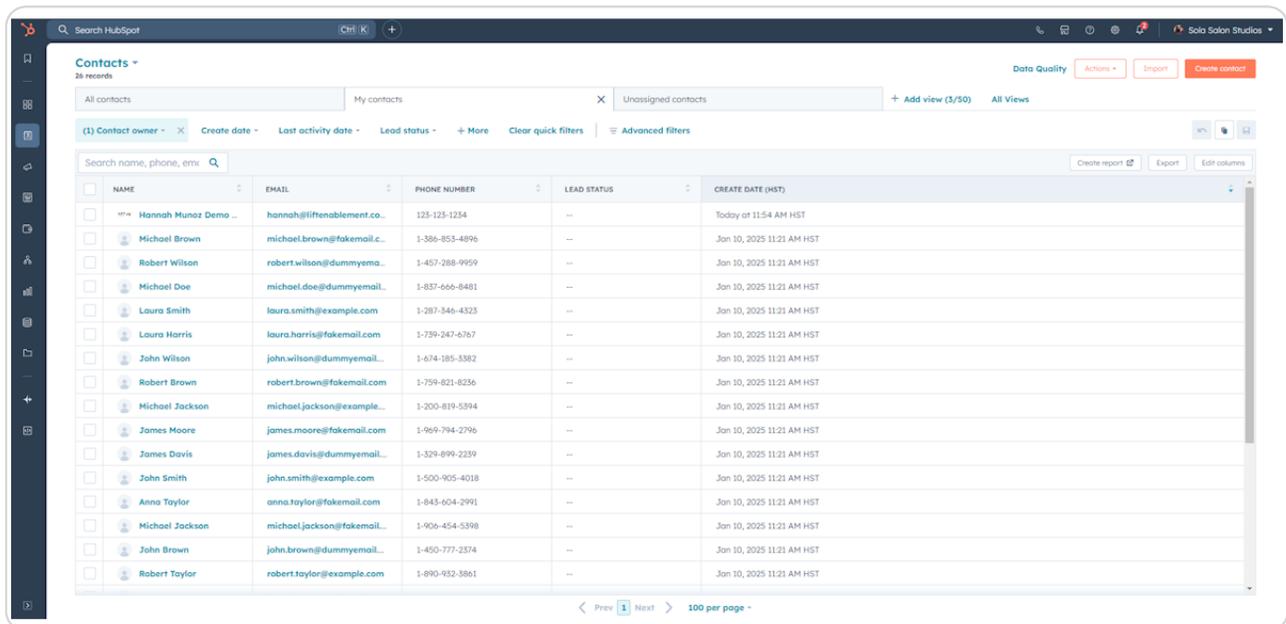
STEP 2

Click on Contacts



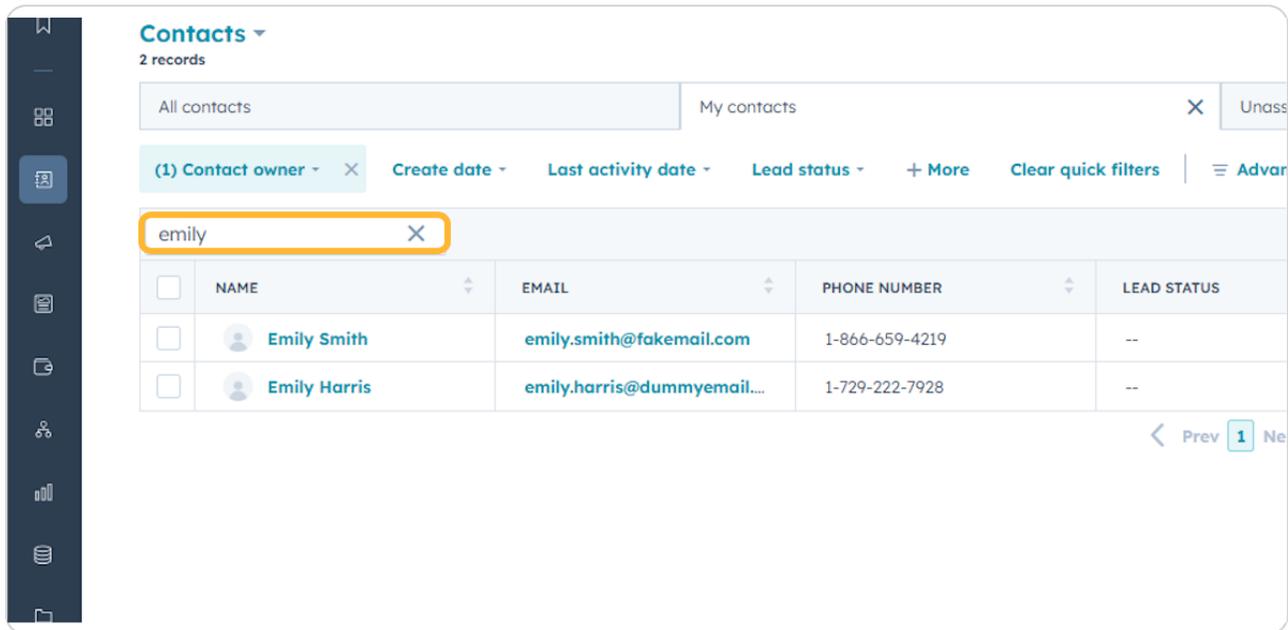
STEP 3

You'll be taken to an overview of Pros (Contacts) in the database



STEP 4

You can search for a specific Pro (Contact) in the search bar

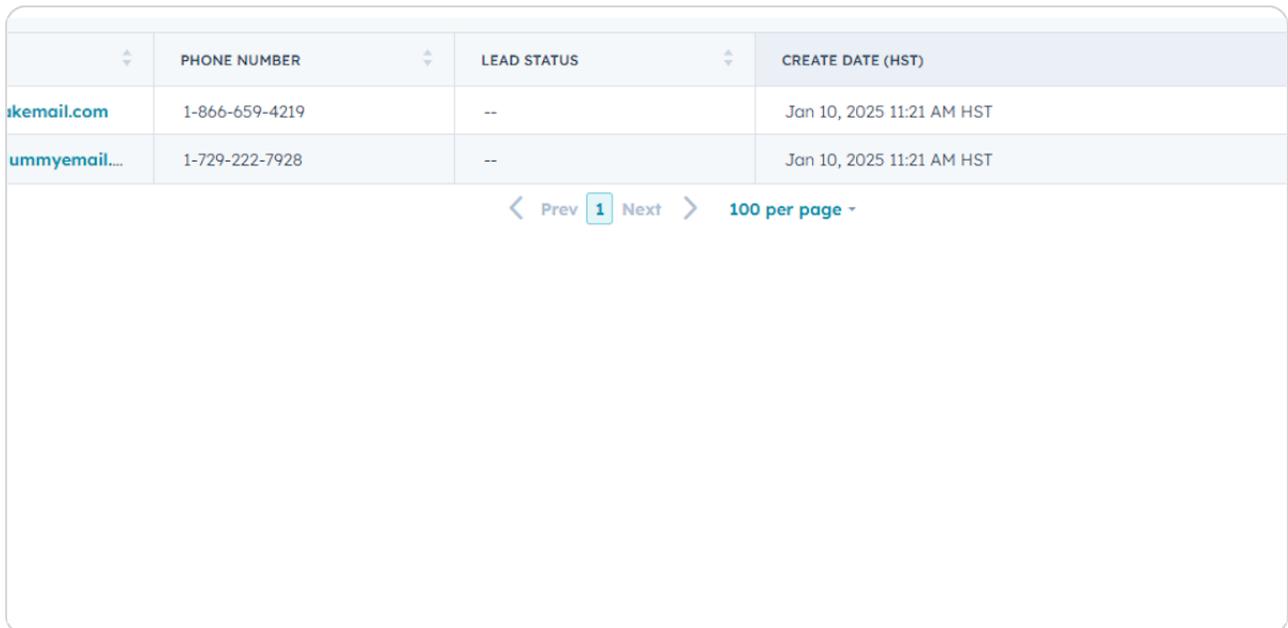


The screenshot shows a CRM interface with a search bar containing the text "emily". Below the search bar, a table displays two contact records:

	NAME	EMAIL	PHONE NUMBER	LEAD STATUS
<input type="checkbox"/>	Emily Smith	emily.smith@fakemail.com	1-866-659-4219	--
<input type="checkbox"/>	Emily Harris	emily.harris@dummyemail...	1-729-222-7928	--

STEP 5

To view information on a Pro (Contact), hover over the Name and Click Preview



The screenshot shows a detailed view of a contact record. The table displays the following information:

	PHONE NUMBER	LEAD STATUS	CREATE DATE (HST)
emily.smith@fakemail.com	1-866-659-4219	--	Jan 10, 2025 11:21 AM HST
emily.harris@dummyemail...	1-729-222-7928	--	Jan 10, 2025 11:21 AM HST

Navigation controls at the bottom include: < Prev 1 Next > 100 per page

STEP 6

A panel with information on the Pro (Contact) will appear

The screenshot displays the HubSpot Contacts interface. On the left, a sidebar contains navigation icons. The main area shows a list of contacts with columns for NAME, EMAIL, PHONE NUMBER, LEAD STATUS, and CREATE DATE (HST). Two contacts are listed: Emily Smith and Emily Harris. A search filter 'emily' is applied. On the right, a detailed view for 'Emily Harris' is open, showing contact information, communication options, and activity.

NAME	EMAIL	PHONE NUMBER	LEAD STATUS	CREATE DATE (HST)
Emily Smith	emily.smith@fakemail.com	1-866-659-4219	--	Jan 10, 2025 11:21 AM HST
Emily Harris	emily.harris@dummyemail...	1-729-222-7928	--	Jan 10, 2025 11:21 AM HST

Emily Harris
dummyemail.com
emily.harris@dummyemail.com

Note Email Call Task Meeting More

About this contact

Email: emily.harris@dummyemail.com
Phone number: 1-729-222-7928
Contact owner: Hannah Munoz
Last contacted: --
Lifecycle stage: Opportunity
Lead status: --
Legal basis for processing contact's data: --
Record source: Import

Pinned activity

Save Cancel View record

STEP 7

If you scroll down on the preview of the Contact, you'll see other sections of information on a Pro. Two areas that are good to take note of are the Helper Links section and the Upcoming activities section

The Help Links section includes important resources that can help you. For example if you get stuck utilizing HubSpot or want to reference the Resource Center, there are links to take you where you need to go. The Upcoming activities section shows you any important activities like tasks or meetings that are coming up.

The screenshot displays the HubSpot interface. On the left, a 'Contacts' list is shown with two records: Emily Smith and Emily Harris. The main area shows the detailed view for Emily Harris. The 'Helper Links (Contacts)' section is highlighted with an orange box and contains links to the HubSpot Plus Resource Center and Intro to HubSpot. The 'Upcoming activities' section is also highlighted with an orange box and shows a scheduled meeting with Hannah on Jan 24. The interface includes a search bar, navigation tabs, and a sidebar with various icons.

NAME	EMAIL	PHONE NUMBER	LEAD STATUS	CREATE DATE (HST)
Emily Smith	emily.smith@fakemail.com	1-866-659-4219	--	Jan 10, 2025 11:21 AM HST
Emily Harris	emily.harris@dummysmail...	1-729-222-7928	--	Jan 10, 2025 11:21 AM HST

STEP 8

To access the full Contact Record you can either Click the Name

	PHONE NUMBER	LEAD STATUS	CREATE DATE (HST)
akemail.com	1-866-659-4219	--	Jan 10, 2025 11:21 AM HST
lummyemail...	1-729-222-7928	--	Jan 10, 2025 11:21 AM HST

< Prev **1** Next > 100 per page ▾

STEP 9

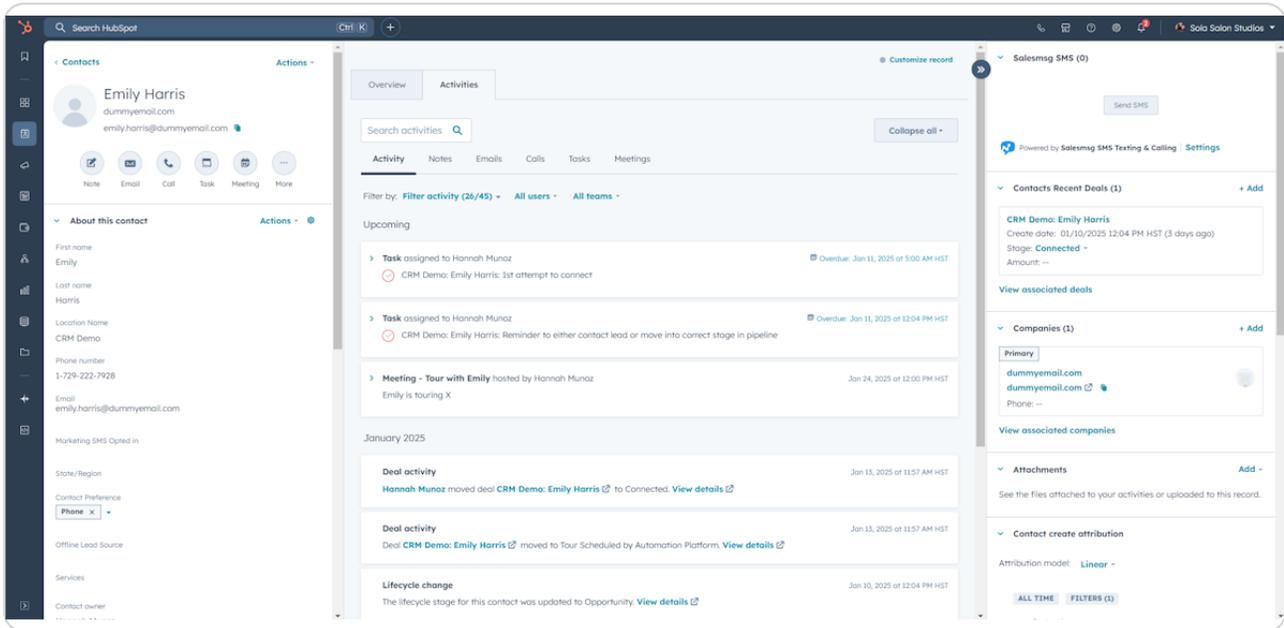
OR Click on View record in the preview panel

	PHONE NUMBER	LEAD STATUS	CREATE DATE (HST)
akemail.com	1-866-659-4219	--	Jan 10, 2025 11:21 AM HST
lummyemail...	1-729-222-7928	--	Jan 10, 2025 11:21 AM HST

< Prev **1** Next > 100 per page ▾

STEP 10

This will take you to the full Contact Record

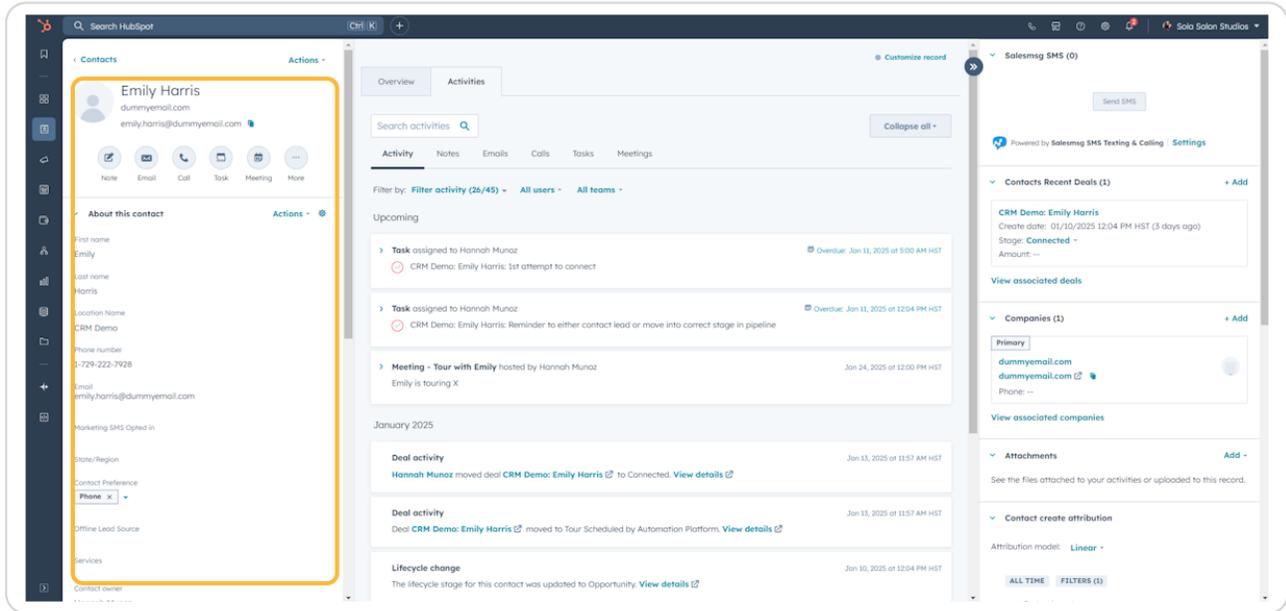


Contact Record Layout/Structure

8 Steps

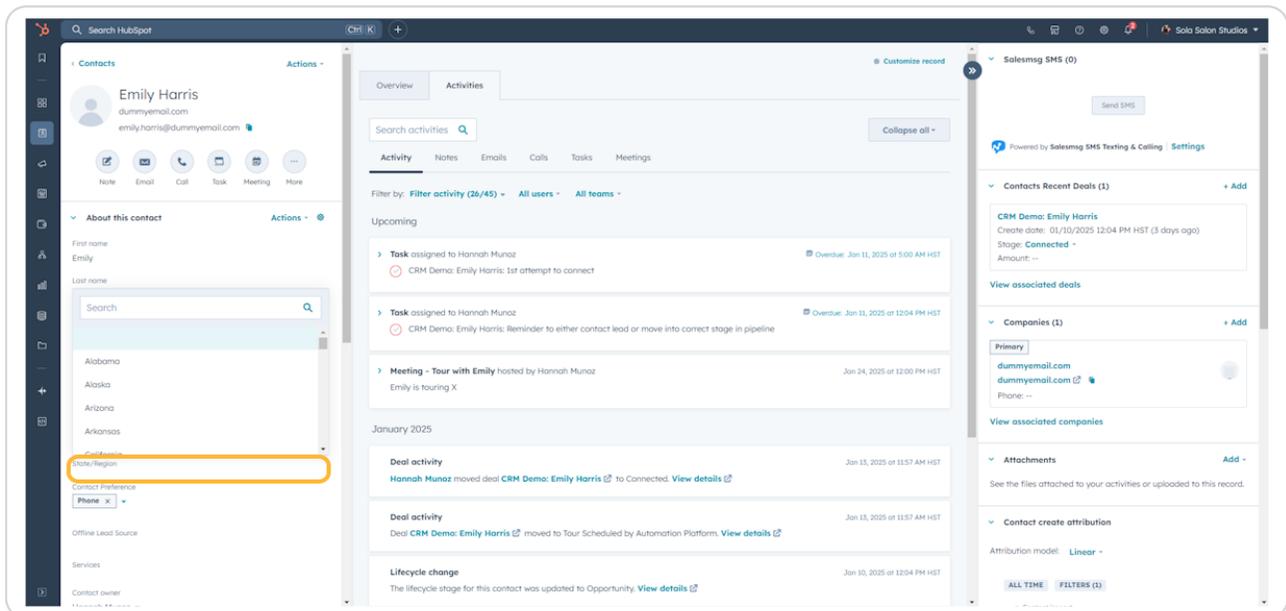
STEP 11

The left-hand side of the record will show About information on the Pro (Contact)



STEP 12

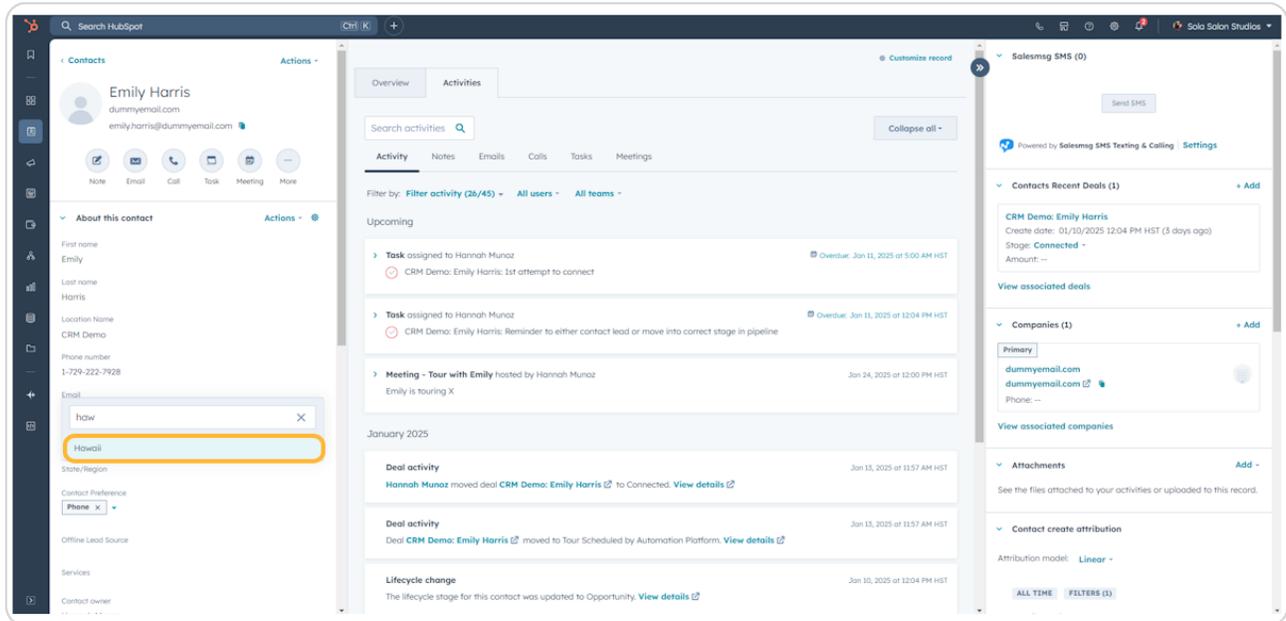
This information is editable if you gather more information on the Pro. To edit information, Click directly in the section that needs updated



STEP 13

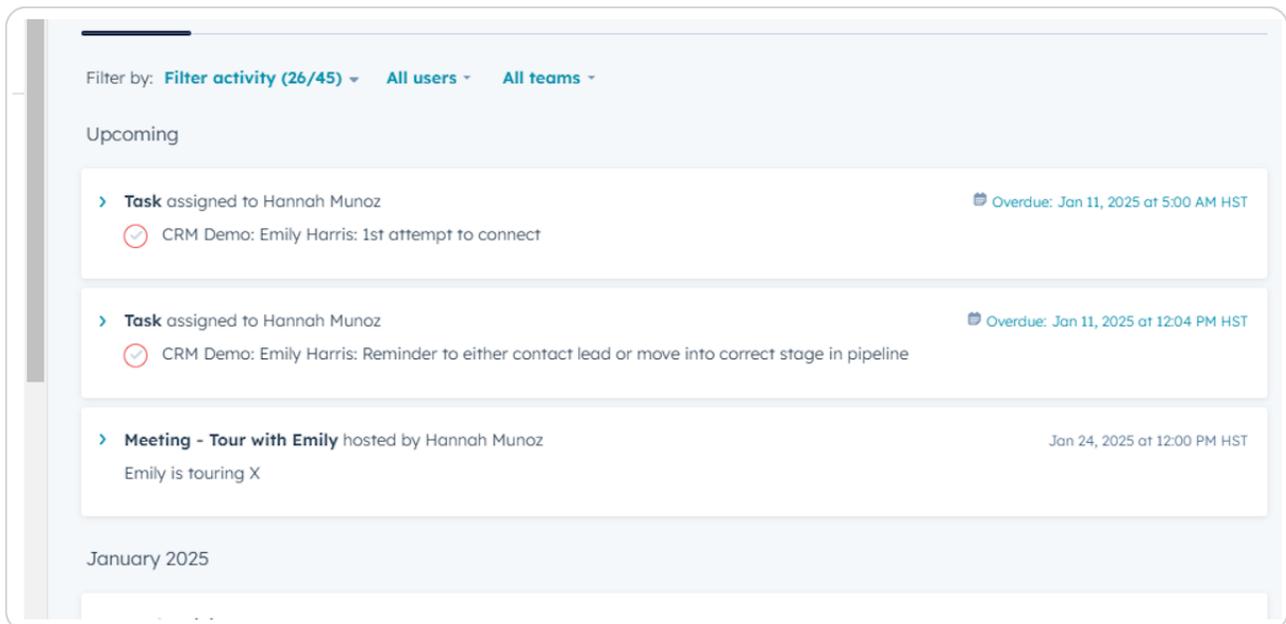
Select the proper element or type in the information

In this example, the updated information was selected from a list.



STEP 14

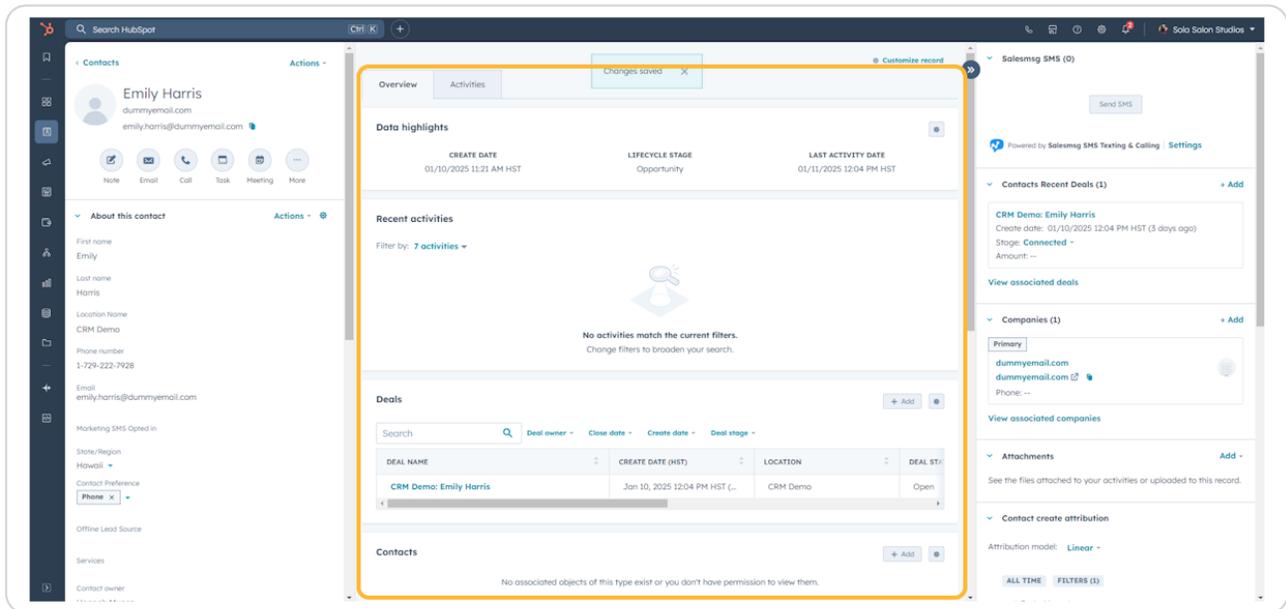
Click on Save



STEP 15

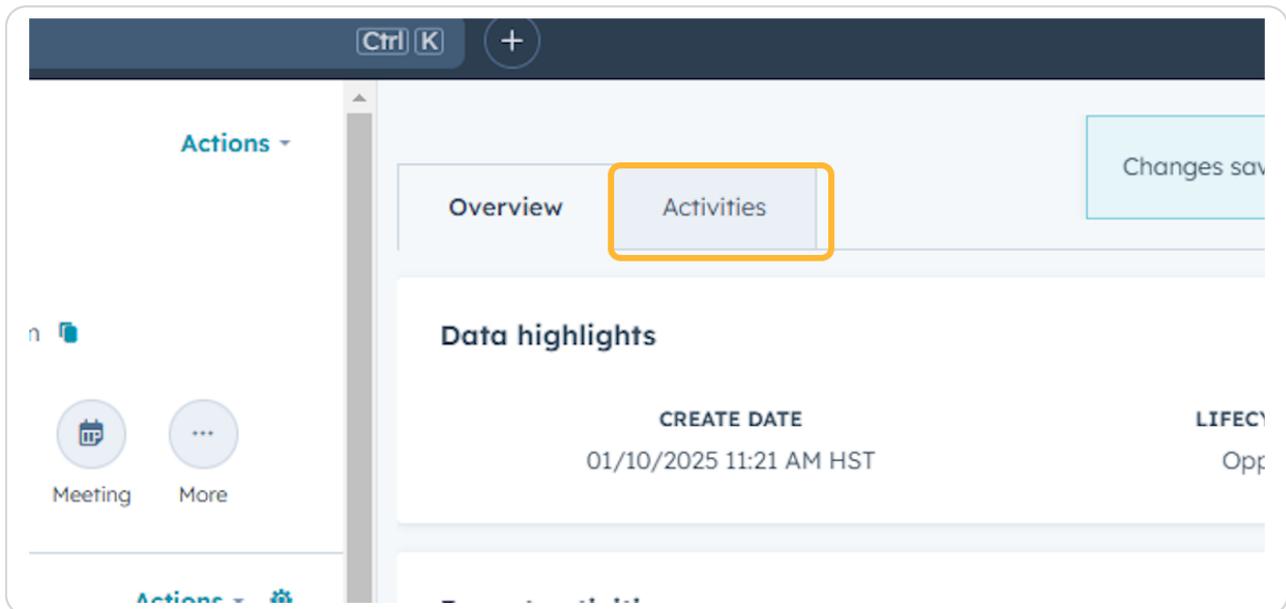
The center of the record holds the Overview and Activities tabs

The Overview tab will give you insight into activities and Deals that this Pro (Contact) is part of.



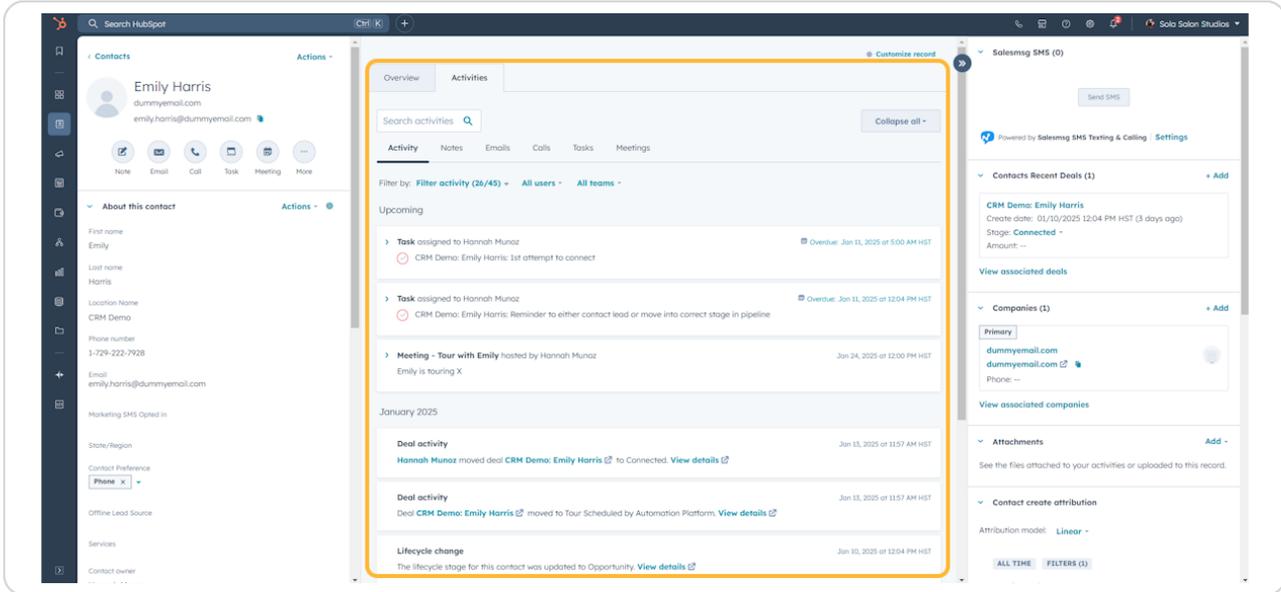
STEP 16

Click on Activities



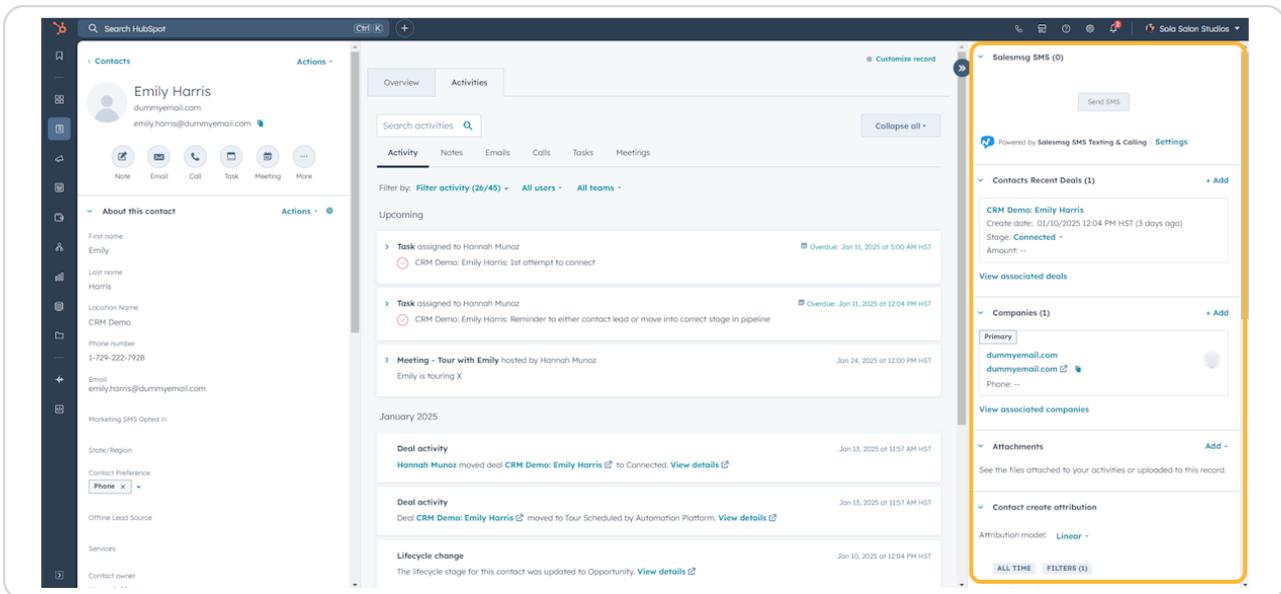
STEP 17

The Activities Tab will show you specifics of what the Pro (Contact) has received, any notes you may have left, or open tasks.



STEP 18

The right-hand side will show you all associations and Salesmsg SMS. For example, if this Pro (Contact) is part of a Deal, you will see that information on the right-hand side.

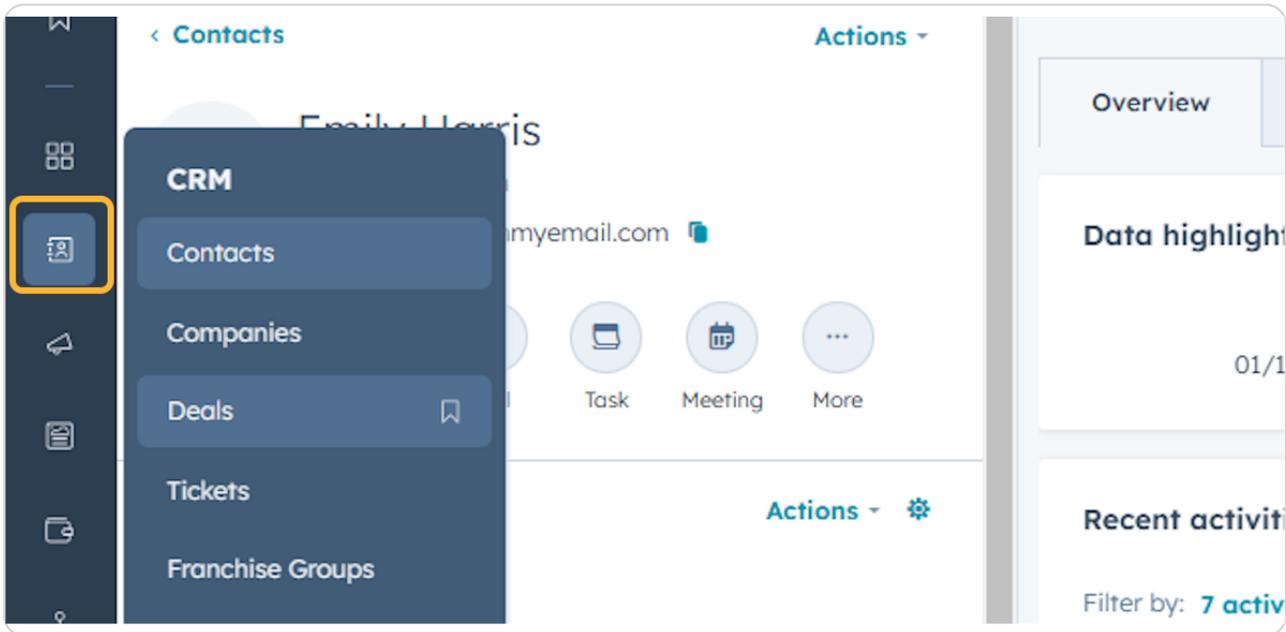


Accessing Contacts from a Deal

9 Steps

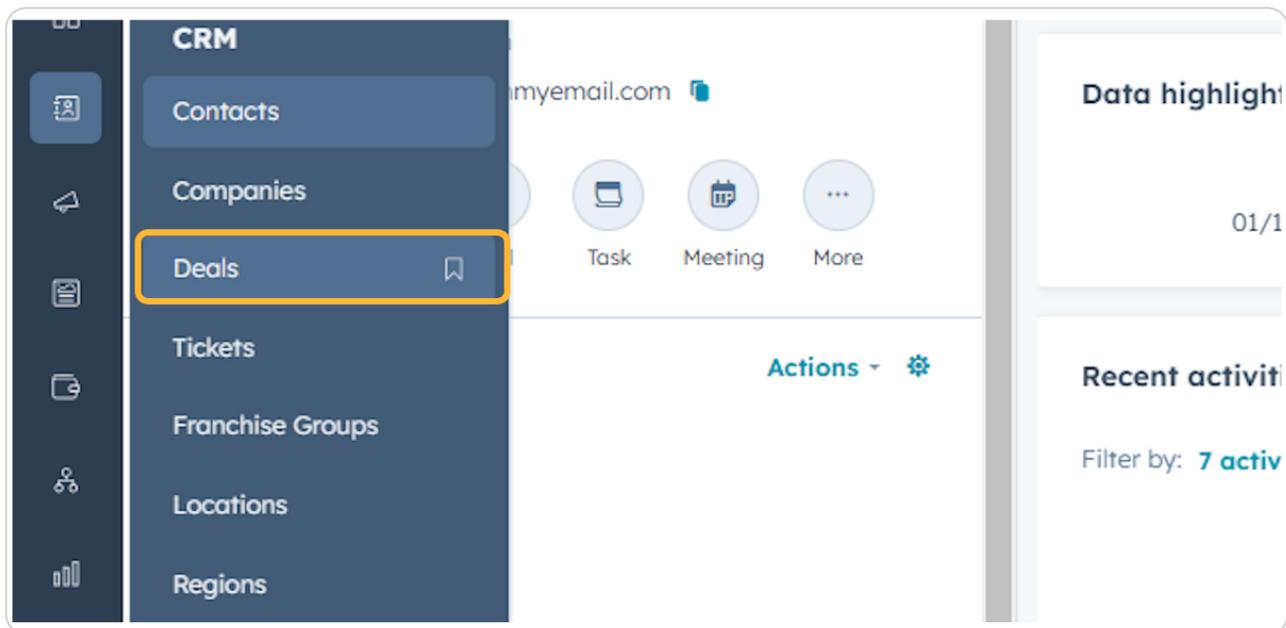
STEP 19

Click on the CRM menu item in the navigation to the left



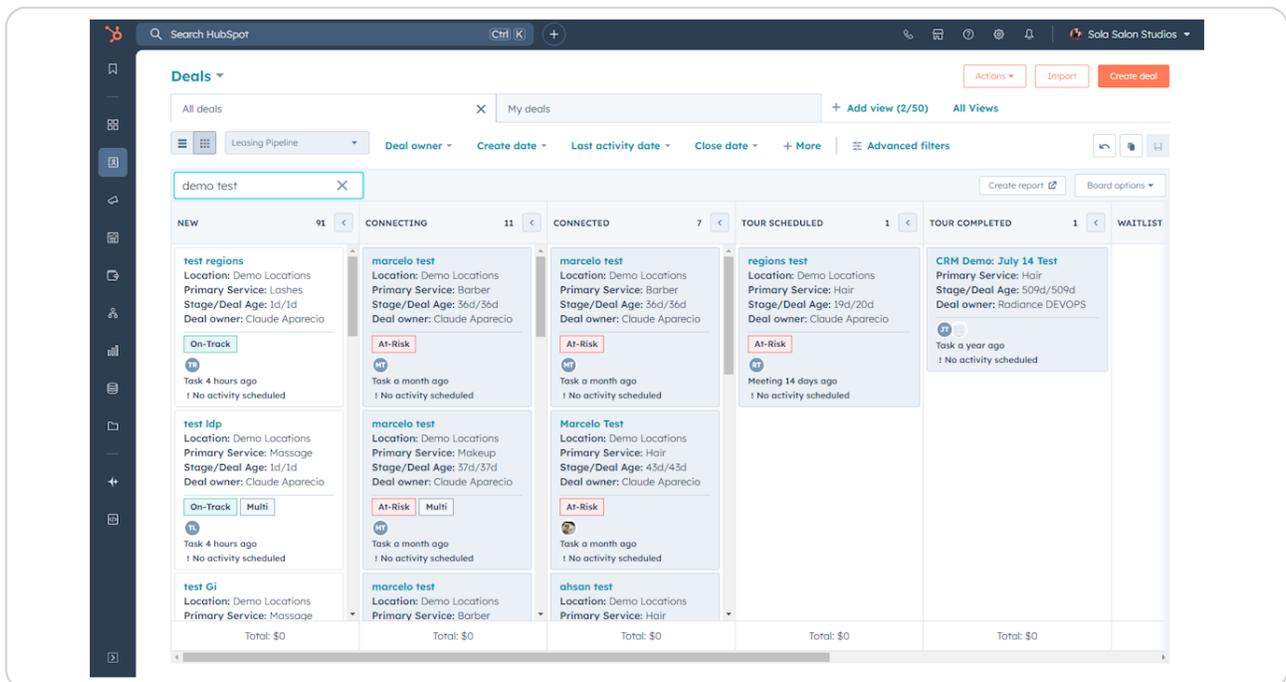
STEP 20

Click on Deals



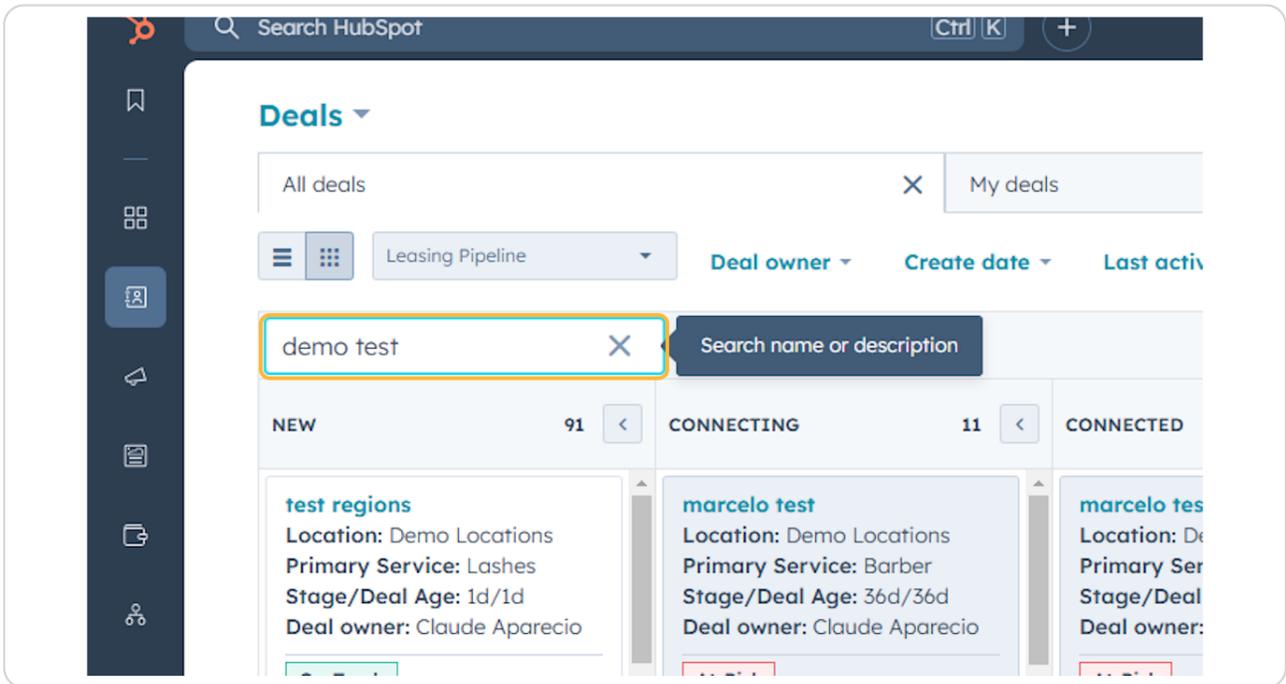
STEP 21

This will bring you to an overview of Deals



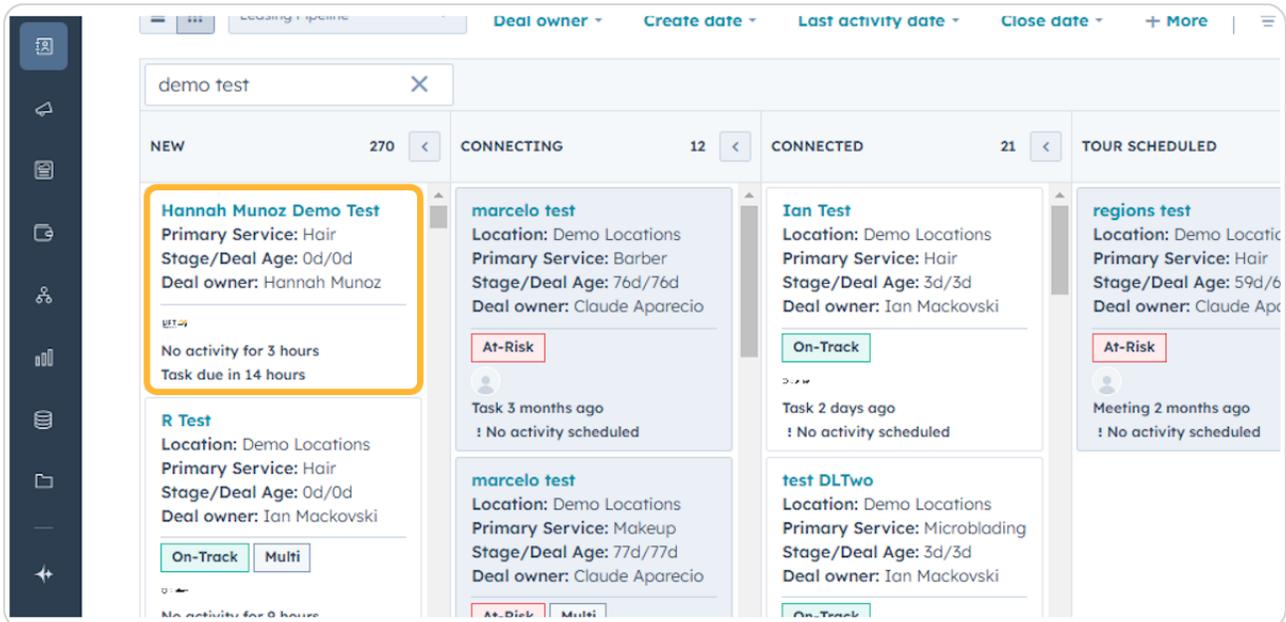
STEP 22

Search for a Deal



STEP 23

Click in the Deal card to pull up the Deal Card Preview



STEP 24

Click on View record in the Deal Card Preview

The screenshot displays a CRM interface with a deal card preview. The interface is divided into four columns representing different deal stages: CONNECTED (21 deals), TOUR SCHEDULED (1 deal), TOUR COMPLETED (1 deal), and WAITLIST. Each column contains a deal card with the following details:

- CONNECTED:**
 - Ian Test:** Location: Demo Locations, Primary Service: Hair, Stage/Deal Age: 3d/3d, Deal owner: Ian Mackovski. Status: On-Track. Task 2 days ago, No activity scheduled.
 - test DLTwo:** Location: Demo Locations, Primary Service: Microblading, Stage/Deal Age: 3d/3d, Deal owner: Ian Mackovski. Status: On-Track. Task 3 days ago, No activity scheduled.
- TOUR SCHEDULED:**
 - regions test:** Location: Demo Locations, Primary Service: Hair, Stage/Deal Age: 59d/60d, Deal owner: Claude Aparecio. Status: At-Risk. Meeting 2 months ago, No activity scheduled.
- TOUR COMPLETED:**
 - July 14 Test:** Location: CRM Demo, Primary Service: Hair, Stage/Deal Age: 549d/549d, Deal owner: Radiance DEVOPS. Status: At-Risk. Task a year ago, No activity scheduled.

STEP 25

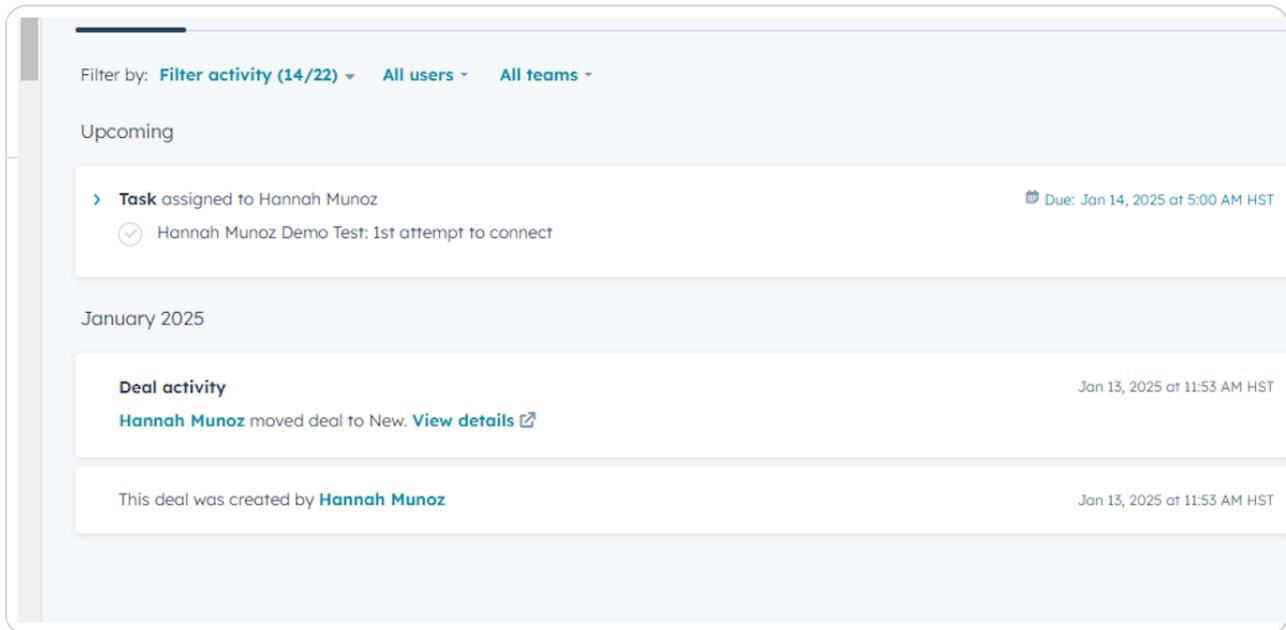
On the right-hand side, locate the Contacts section

The screenshot shows a CRM activity feed with the following sections:

- Filter by:** Filter activity (14/22), All users, All teams.
- Upcoming:**
 - Task assigned to Hannah Munoz:** Due: Jan 14, 2025 at 5:00 AM HST. Hannah Munoz Demo Test: 1st attempt to connect.
- January 2025:**
 - Deal activity:** Hannah Munoz moved deal to New. View details. Jan 13, 2025 at 11:53 AM HST.
 - This deal was created by Hannah Munoz:** Jan 13, 2025 at 11:53 AM HST.

STEP 26

Click on the Pro (Contact) Name



The screenshot shows a CRM activity feed for a contact named Hannah Munoz. At the top, there are filter options: "Filter by: Filter activity (14/22)", "All users", and "All teams". Below this, the feed is organized into sections. The "Upcoming" section contains a task: "Task assigned to Hannah Munoz" with a due date of "Jan 14, 2025 at 5:00 AM HST" and a sub-item "Hannah Munoz Demo Test: 1st attempt to connect". The "January 2025" section contains a "Deal activity" entry: "Hannah Munoz moved deal to New. View details" with a timestamp of "Jan 13, 2025 at 11:53 AM HST". Below this is a note: "This deal was created by Hannah Munoz" with a timestamp of "Jan 13, 2025 at 11:53 AM HST".

STEP 27

Congratulations! You've completed the Contact Record Overview

