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
- $\cdot\,$ An overview of the layout and structure of the Contact Record

27 Steps <u>View most recent version</u>

Created by

Doug Davidoff

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Last Updated Jan 13, 2025



<u>Click on the CRM menu item on the left-hand navigation</u>

Д —	Contacts - 5 records		
88	CRM		X My conta
8	Contacts	Create date 👻 Last a	ctivity date 👻
4	Companies	×	
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Click on Contacts

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	Tickets	IST I	ian.mackovski+943@outlia
في	Franchise Groups	Notifications	notification-demo@test.com

STEP 3

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

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	(1) Contact owner - \times Create date -	- Last activity date - Lead	status - + More Clear quic	k filters 📔 🗄 Advanced filters				n 🔒 🔒
\$	Search name, phone, emc Q						Create report 🖉 Export	Edit columns
P	■ NAME	EMAIL ÷	PHONE NUMBER	LEAD STATUS	CREATE DATE (HST)			÷ ^
_	Hannah Munoz Demo	hannah@liftenablement.co	123-123-1234		Today at 11:54 AM HST			
6	Michael Brown	michael.brown@fakemail.c_	1-386-853-4896	-	Jan 10, 2025 11:21 AM HST			
å	Robert Wilson	robert.wilson@dummyema	1-457-288-9959	-	Jan 10, 2025 11:21 AM HST			
al	Michael Doe	michael.doe@dummyemail_	1-837-666-8481		Jan 10, 2025 11:21 AM HST			
8	Loura Smith	laura.smith@example.com	1-287-346-4323		Jan 10, 2025 11:21 AM HST			
	📃 👔 Laura Harris	laura.harris@fakemail.com	1-739-247-6767		Jan 10, 2025 11:21 AM HST			
•	John Wilson	john.wilson@dummyemail	1-674-185-3382		Jan 10, 2025 11:21 AM HST			
-	Robert Brown	robert.brown@fakemail.com	1-759-821-8236		Jan 10, 2025 11:21 AM HST			
+	Michael Jackson	michael.jackson@example	1-200-819-5394	-	Jan 10, 2025 11:21 AM HST			
5	James Moore	james.moore@fakemail.com	1-969-794-2796	-	Jan 10, 2025 11:21 AM HST			
	James Davis	james.davis@dummyemail	1-329-899-2239		Jan 10, 2025 11:21 AM HST			
	John Smith	john.smith@example.com	1-500-905-4018	-	Jan 10, 2025 11:21 AM HST			
	Anna Taylor	anna.taylor@fakemail.com	1-843-604-2991		Jan 10, 2025 11:21 AM HST			
	Michael Jackson	michael.jackson@fakemail	1-906-454-5398		Jan 10, 2025 11:21 AM HST			
	John Brown	john.brown@dummyemail	1-450-777-2374	-	Jan 10, 2025 11:21 AM HST			
	Robert Taylor	robert.taylor@example.com	1-890-932-3861	-	Jan 10, 2025 11:21 AM HST			
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e		NAME	\$	EMAIL	÷	PHONE NUMBER	\$	LEAD STATUS	;
_		Emily Smith		emily.smith@fake	mail.com	1-866-659-4219			
ف		Emily Harris		emily.harris@dum	myemail	1-729-222-7928			
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8									
6									

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

STEP 5

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

\$	PHONE NUMBER	÷	LEAD STATUS	÷		CREATE DATE (HST)
ıkemail.com	1-866-659-4219					Jan 10, 2025 11:21 AM HST
ummyemail	1-729-222-7928					Jan 10, 2025 11:21 AM HST
			< Prev 1	Next 🔪 1	100	per page -

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





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.

>>	Q Search HubSpot					Emily Harris X
	Contacts -					
- 00	All contacts My contact	ts X	Unassigned contacts		+ Add view (3/50) A	 Helper Links (Contacts)
	(1) Contact owner - × Create date - Last activity date - Lea	d status - + More Clear quick filters	= Advanced filters			Search for a topic
	emily					✓ General
	NAME CEMAIL C	PHONE NUMBER	us ÷	CREATE DATE (HST)		HubSpot Plus+ Resource Center [2] [] III4 Quick FAQ for all things password resets
8	Emily Smith emily.smith@fakemail.com	1-866-659-4219		Jan 10, 2025 11:21 AM HST		Intro to HubSpot + D =+ Quick FAQ for all things password resets
	Emily Harris emily.harris@dummyemail	1-729-222-7928		Jan 10, 2025 11:21 AM HST		> FAQ
		< Pre	rev 1 Next > 100 j	per page -		Need help? Click here.
						Powered by Helper Links 0
						Recent activities
						 Upcoming activities
						Filter by: All activities +
						Hannah has a scheduled meeting Jon 24,
						Tour with Emily Meeting type Meeting outcome
						Tour Scheduled
Þ						Save Cancel View record



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

¢ РН	IONE NUMBER	÷	LEAD STATUS	÷	CREATE DATE (HST)
skemail.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
			<pre> Prev 1 Next > </pre>	100	per page -



This will take you to the full Contact Record



Contact Record Layout/Structure

8 Steps



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

>	Q. Search HubSpot	CHIK +	% 冠 ① ゆ 🦨 🏘 Sola Salan Studios 🕶
R	< Contacts Actions -	Customize record	Salesmsg SMS (0)
88	Emily Harris dummyemai.com emilyzharris@dummyemail.com	Overview Activities Search activities Q Collapse all -	Send SMS
4	Image: Constraint of the second sec	Activity Notes Emolis Calls Tasks Meetings Filter by: Filter activity (ds/45) - All users - All teams -	Contacts Recent Deals (1) + Add
G	About this contact Actions - 🕸	Upcoming	CRM Demo: Emily Harris Create date: 01/10/2025 12:04 PM HST (3 days ago)
Å	First name Emily	Task assigned to Honrah Munaz Orwelsur. Jan 11, 2025 ef 500 AH HST Ormer Emily Honris: 1st attempt to connect	Stoge: Connected - Amount:
8	Harris Location Name CRM Demo	Task assigned to Hannah Munoz Okerbaic. Jan 11, 2025 at 12:04 PM HST O CMM Deno: Emily Harris: Reminder to either contact lead or move into correct stage in pipeline	View associated deals Companies (1) + Add
- +	Phone number 1-729-222-7928 Email Email	Meeting - Tour with Emily hosted by Hannah Munaz Jan 24, 2025 at 12:00 PM HST Emily is touring X	Primary dummyemail.com dummyemail.com @ *
8	enning annagadannin yen daloodin Marketing SMS Opted in	January 2025	View associated companies
	Stote/Region Contoct Preference	Deal activity Jan 11, 2025 or 1157 AM HST Hannah Munoz moved deal CRM Demo: Emily Harris 🖉 to Connected. View details 🖉	 Attachments Add - See the files attached to your activities or uploaded to this record.
	Dffline Lead Source	Deal activity Jon 13, 2025 or 11.57 AH HST Deal CRM Demo: Emily Harris C? moved to Tour Scheduled by Automation Plantom. View details C?	Contact create attribution
Þ	Services Contact owner	Lifecycle change Jon 10, 2025 or 1204 PM HST The lifecycle stage for this contact was updated to Opportunity View details 2	ALL TIME FILTERS (1)

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

%	Q. Search HubSpot		🌜 🗟 🕐 🐠 🧬 🏠 Sola Salan Studios 💌
я —	< Contacts Actions -	Overview Activities	Salesmsg SMS (0)
88	dummyemail.com emily.horris@dummyemail.com	Search activities Q	Send SMS
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	✓ About this contact Actions ~ ∅	Upcoming	CRM Demo: Emily Harris Create date: 01/10/2025 12:04 PM HST (3 days ago)
Å	First name Emily	Task assigned to Hannoh Munoz OKH Demo: Emily Harris: 1st attempt to connect	Stoge: Connected + Amount:
ati i	Lost nome		View associated deals
8	Journa and Annual Annua	Task assigned to Hannah Munaz Overdee: Jon 11,2025 or 12:04 PM H3T Or CRH Demo: Emily Harris: Reminder to either contact lead or move into correct stage in pipeline	 Companies (1) + Add Primary
- +	Alabama Alaska	Meeting - Tour with Emily hosted by Honrah Munaz Jan 34, 2025 or 12:00 PH HGT Emily Is touring X	dummyemail.com dummyemail.com (2) Phone:
•	Arizona Arkansas	January 2025	View associated companies
	Control Performance	Deal activity Jan 11, 2025 of 1157 AM HST Hannah Munaz moved deal CRM Demo: Emily Harris 🖉 to Connected. View details 🖉	 Attachments Add - See the files attached to your activities or uploaded to this record.
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Þ	Services Contact owner	Lifecycle change Jan 30, 2025 or 12:04 PM HET The lifecycle stoge for this contact was updated to Opportunity. View details [2]	ALL TIME FILTERS (1)



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STEP 13
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Select the proper element or type in the information

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

>>	Q. Search HubSpot		🌜 🗟 💿 🐵 🧟 🙆 Sola Salon Studios 🔹
Д	< Contacts Actions ~	Customize record	Salesmsg SMS (0)
88	Emily Harris dummyemol.com emily:harris@dummyemol.com	Overview Activities Search activities Q Collapse all-	Send SHS
ه ۵	Image: Note Image:	Activity Notes Emails Calls Tasks Meetings	Contacts Recent Deals (1) + Add
6	 About this contact Actions - Ø 	Upcoming	CRM Demo: Emily Harris Create date: 01/0/2025 12:04 PM HST /3 days gap)
&	First name Emily	Task assigned to Hannah Munoz Oversier: Jan 11, 2025 of 500 AM HST	Stoge: Connected - Amount:
lte	Last name Harris	CRM Demo: Emily Harris: 1st attempt to connect	View associated deals
۲	Location Name CRM Demo	Task assigned to Honnah Munoz Orendue: John 11, 2025 of 12:04 PM HST Orendue: John 11, 2025 of 12:04 PM HST Orendue: John 11, 2025 of 12:04 PM HST	Companies (1) + Add
+	Phone number 1-729-222-7928 Emol	Meeting - Tour with Emily hosted by Hannah Munaz Jan 34, 2025 at 1200 PH HST Emily is touring X	Primery dummyemail.com dummyemail.com [2] @ Phone:
69	haw X	January 2025	View associated companies
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Þ	Services Contoct owner	Lifecycle change Jon 10, 2025 of 1204 PM HST The lifecycle stage for this contact was updated to Opportunity. View details 🖉	ALL TIME FILTERS (1)

STEP 14

Click on Save

Filter by: Filter activity (26/45) - All users - All teams - Upcoming	
Task assigned to Hannah Munoz CRM Demo: Emily Harris: 1st attempt to connect	🛱 Overdue: Jan 11, 2025 at 5:00 AM HS
Task assigned to Hannah Munoz CRM Demo: Emily Harris: Reminder to either contact lead or move into correct stage in pipeline	Dverdue: Jan 11, 2025 at 12:04 PM HS
Meeting - Tour with Emily hosted by Hannah Munoz Emily is touring X	Jan 24, 2025 at 12:00 PM HS
January 2025	



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.

Q. Search HubSpot		ରେ 📰 🕐 🚳 🦨 🖉 Sola Salon Studios
Contacts Actions - Emily Harris	Overview Activities	smire record Salesmsg SMS (0)
durmyenol.com emily.koris@durmyenol.com @ @ @ C @ @ @ Note Enail Call Task Heeting Hore	Data highlights LIFECYCLE STADE LAST ACTIVITY DATE 01/10/2025 11:21 AM HST Opportunity 01/11/2025 12:04 PM HST	Contacts Recent Deals (1) + Ad
About this contact Actions - First name Emily	Recent activities Filter by: 7 activities +	CRM Demo: Emily Harris Create date: 01/10/2025 12:04 PM HST (3 days ago) Stage: Connected - Amount -
Lost nome Harris	8	View associated deals
Location Nome CRM Demo Phone number 1-729-222-7928	No activities match the current filters. Change filters to broaden your search.	Companies (1) * Ad Primary dummyemail.com
Email emily.harris@dummyemail.com	Deals +	Add
Marketing SMS Opted in State/Region Hawaii -	Scorch Q. Deal wwwer ~ Clease date ~ Create date ~ Deal trage ~ DEAL NAME 0 CREATE DATE (HST) 0 LOCATION 0	DEAL STA
Contact Preference Phone X +	CRM Demo: Emily Horris Jon 10, 2023 12:04 PM HST (CRM Demo	Open See the files attached to your activities or uploaded to this record Contact create attribution
Offline Lead Source Services	Contacts +	Add Attribution model: Linear -
Contact owner	No associated objects of this type exist or you don't have permission to view them.	ALL TIME FILTERS (1)

STEP 16

Click on Activities

Actions -	Overview Activities	Changes sav
n 🐚	Data highlights	
Meeting More	CREATE DATE 01/10/2025 11:21 AM HST	LIFEC) Opr
Actions - 8		



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

Q Search HubSpot				% 🗟 ⑦ 🚳 啔 🥀 Sola Salon Studios
< Contacts	Actions -	İ	Customize record	Salesmsg SMS (0)
Emily Harris dummyemail.com emily/harris@dummyemail.com		Overview Activities Search activities Q	Collapse all •	Send SMS
Note Email Call Task M	B Seeting More	Activity Notes Emails Calls Tasks Meetings Filter bz: Filter activity (26/45) + All users + All teams +		Contacts Recent Deals (1) + Add
 About this contact 	Actions - @	Upcoming		CRM Dema: Emily Harris Create date: 01/10/2025 12:04 PM HST (3 days ago)
First name Emily		Task assigned to Hannah Munaz CRM Demor. Emily Harris: 1st attempt to connect	Overdue: Jan 11, 2025 at 5:00 AM HST	Stage: Connected + Amount:
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CRM Demo		CRM Demo: Emily Harris: Reminder to either contact lead or move into correct stage in pipeline		Companies (1) + Add Primary
Phone number 1-729-222-7928 Email emily.harris@dummyemail.com		Meeting - Tour with Emily hosted by Hannoh Munoz Emily is touring X	Jan 24, 2025 at 12:00 PM HST	dummyemoil.com dummyemoil.com [2] @
Marketing SMS Opted in		January 2025		View associated companies
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Services		Lifecycle change	Jan 10, 2025 at 12:04 PM HST	
Contact owner		The lifecycle stage for this contact was updated to Opportunity. View details 🗹		HER FALLE FALLEND (A)

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.

Q Search HubSpot			ର 🗟 🕐 🚳 🖓 🧔 Sola Salan Stu	idios
< Contacts Actions -		Customize record	Salesmsg SMS (0)	
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Services	Lifecycle change	Jan 10, 2025 at 12:04 PM HST	Although moves Linear *	



Accessing Contacts from a Deal

STEP 19

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





Click on Deals

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4	Companies		01/1
2	Deals 🛛	Task Meeting More	
G	Tickets	Actions - 🌣	Recent activit
	Franchise Groups		Tilter han Toott
ጽ	Locations		Filter by: 7 activ
000	Regions		

STEP 21

This will bring you to an overview of Deals





Search for a Deal

×	Q Search HubSpot			Ctrl K	(+)
Д	Deals *				
	All deals			× My dea	als
1	E III Leasing Pipel	ne 🔻	Deal owner 👻	Create date	 Last activ
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4					
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	test regions	A	marcelo test	· · · · · · · · · · · · · · · · · · ·	marcelo tes
G	Location: Demo Loca	tions	Location: Demo L	ocations	Location: De
	Primary Service: Las Stage (Deal Age: 1d/	nes 1d	Stage / Deal Age:	Barber 36d/36d	Primary Ser
*	Deal owner: Claude A	parecio	Deal owner: Clau	de Aparecio	Deal owner:
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STEP 23

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





Click on View record in the Deal Card Preview



STEP 25

On the right-hand side, locate the Contacts section





Click on the Pro (Contact) Name



STEP 27

Congratulations! You've completed the Contact Record Overview



