

# Sola Salon Studios - Deal Record Overview

Deals represent an opportunity with a Pro. Deals allow you to see where the Pro came from, top level information about the Pro, and other information to help you speak with the Pro.

This guide will walk you through:

- Accessing Deals
- Accessing the Deal Card
- Overview of the Deal Record
- Creating a Deal
- Updating Deal Stages

42 Steps [View most recent version](#) 

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Created by

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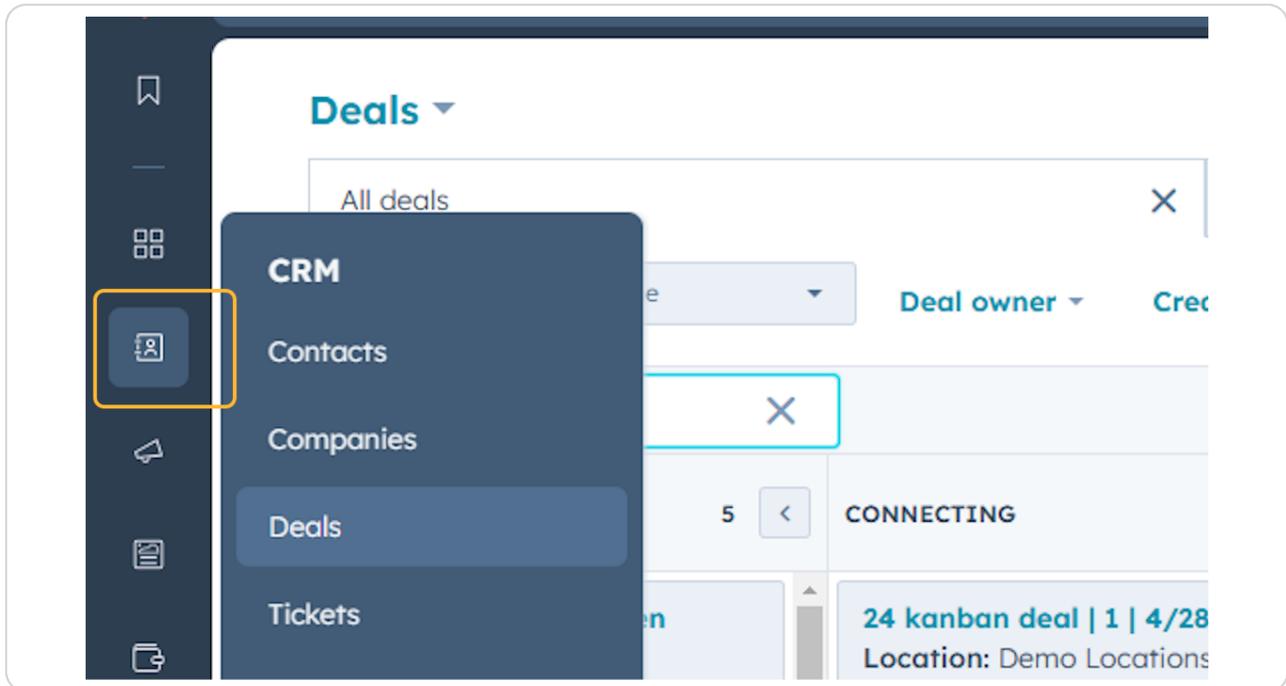
Jan 16, 2025

# # Accessing Deals - Jump into HubSpot

4 Steps

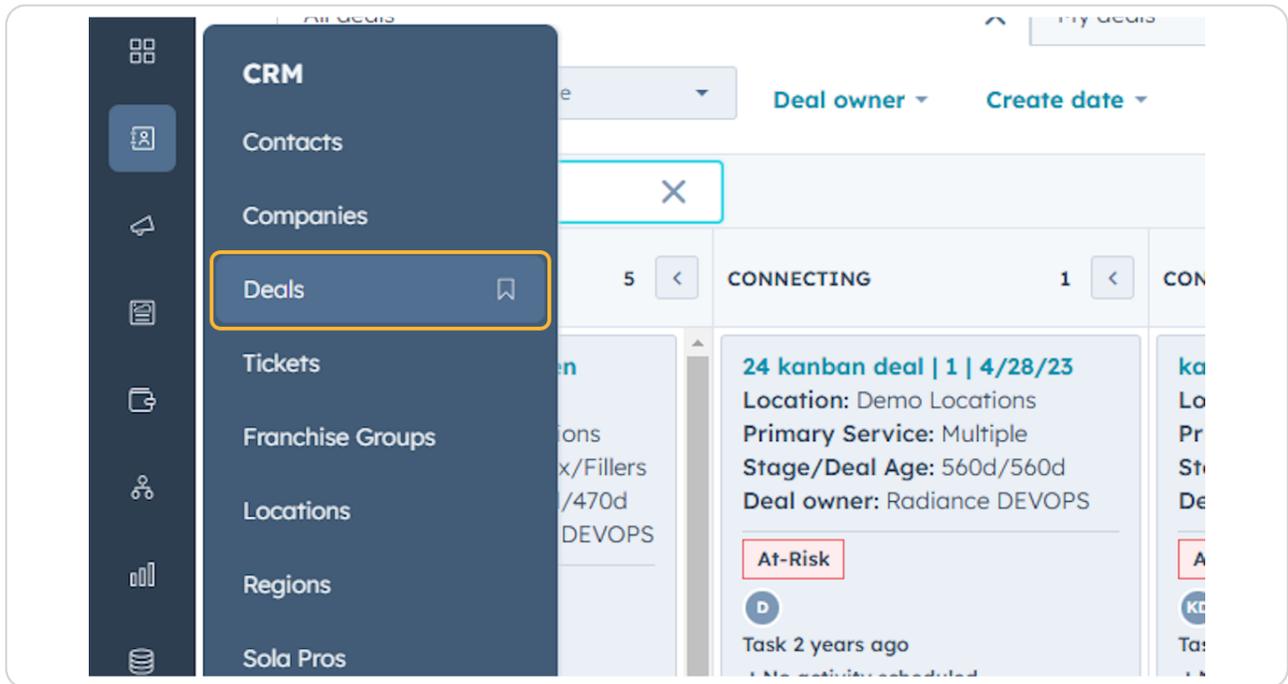
## STEP 1

Click on the CRM menu item from the navigation on the left



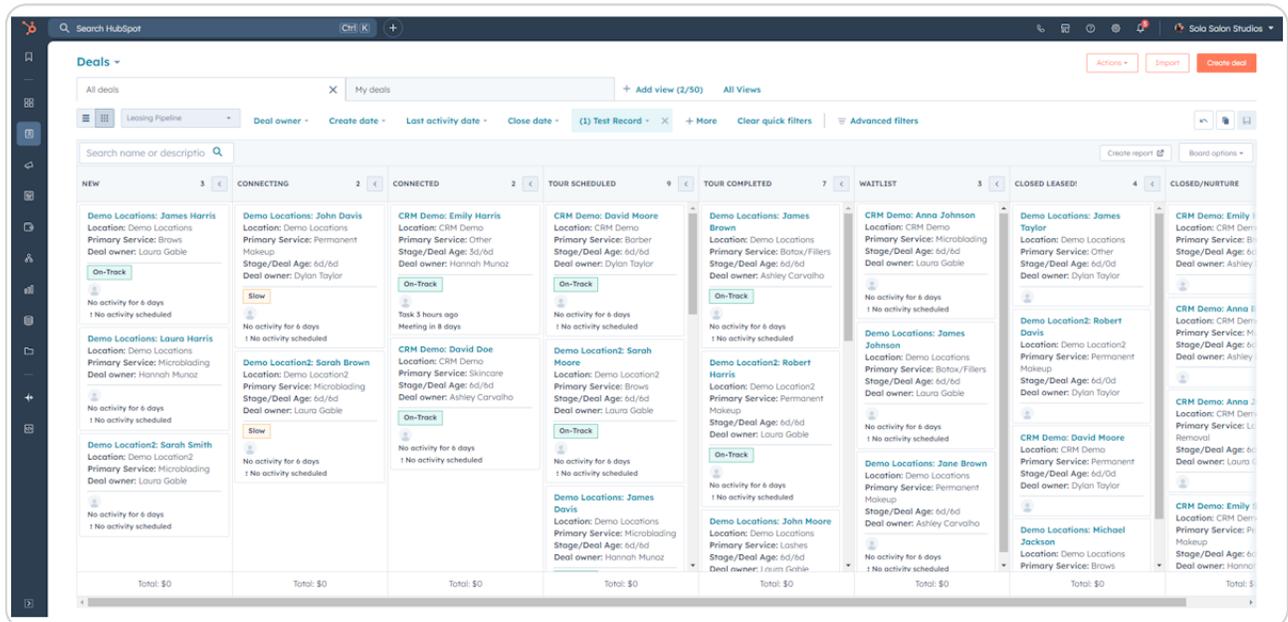
## STEP 2

### Click on Deals



## STEP 3

### This will bring you to an overview of Deals



## STEP 4

To find a specific Deal, you can search for it

The screenshot shows the HubSpot Deals interface. At the top, there is a search bar with the text "Search HubSpot" and a "Ctrl K" shortcut. Below the search bar, the "Deals" section is visible, with a search filter set to "demo". The deals are organized into four columns: NEW (3 deals), CONNECTING (2 deals), CONNECTED (2 deals), and TOUR SCHEDULED. Each deal card displays key information such as the deal name, location, primary service, stage/deal age, and deal owner. The "demo" search results are highlighted with a yellow border.

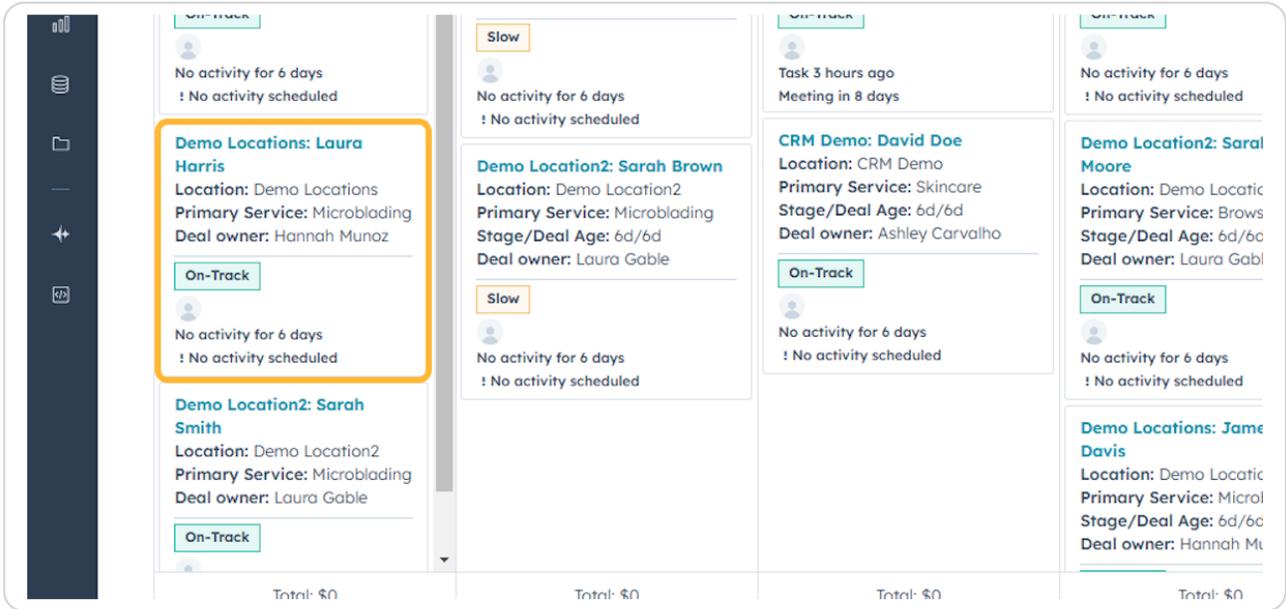
NEW	CONNECTING	CONNECTED	TOUR SCHEDULED
<b>Demo Locations: James Harris</b> Location: Demo Locations Primary Service: Brows Deal owner: Laura Gable On-Track No activity for 6 days	<b>Demo Locations: John Davis</b> Location: Demo Locations Primary Service: Permanent Makeup Stage/Deal Age: 6d/6d Deal owner: Dylan Taylor Slow	<b>CRM Demo: Emily Harris</b> Location: CRM Demo Primary Service: Other Stage/Deal Age: 3d/6d Deal owner: Hannah Munoz On-Track Task 3 hours ago	<b>CRM Demo: David Moe</b> Location: CRM Demo Primary Service: Barbe Stage/Deal Age: 6d/6d Deal owner: Dylan Taylor On-Track No activity for 6 days

## # Accessing the Deal Card Preview

9 Steps

## STEP 5

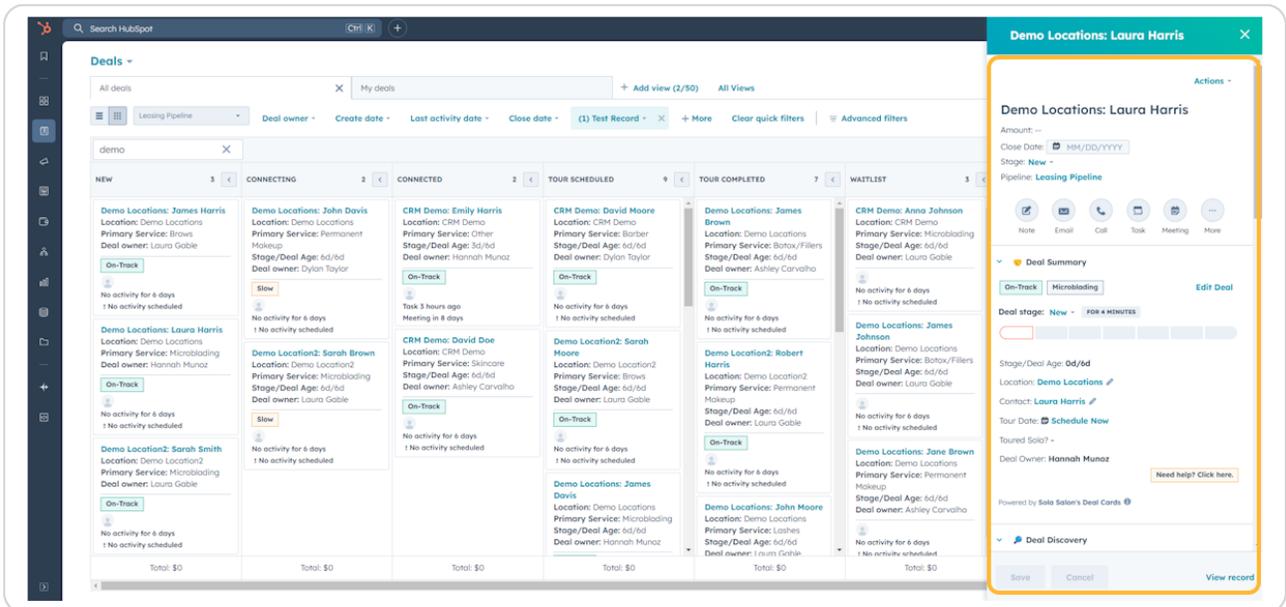
### To open the Deal Card Preview, Click on the Deal Card



## STEP 6

### The Deal Card Preview will open

Note: You can update information on this card view. Click into the section that needs updated and either choose from a dropdown of items or directly type in the information.



## STEP 7

**Note: You can create notes and tasks on the Deal from the Deal Card Preview**

The screenshot shows a CRM interface with a list of deal cards on the left and a detailed view on the right. The deal cards include:

- Demo Locations: James Brown**  
Location: Demo Locations  
Primary Service: Botox/Fillers  
Stage/Deal Age: 6d/6d  
Deal owner: Ashley Carvalho  
Status: On-Track  
No activity for 6 days ! No activity scheduled
- CRM Demo: Anna Johnson**  
Location: CRM Demo  
Primary Service: Microblading  
Stage/Deal Age: 6d/6d  
Deal owner: Laura Gable  
No activity for 6 days ! No activity scheduled
- Demo Locations: James Johnson**  
Location: Demo Locations

The detailed view for **Demo Locations: Laura Harris** includes:

- Amount: --
- Close Date: MM/DD/YYYY
- Stage: New
- Pipeline: Leasing Pipeline
- Actions: Note, Email, Call, Task, Meeting, More
- Deal Summary: On-Track, Microblading, Edit Deal
- Deal stage: New FOR 4 MINUTES

## STEP 8

**If you need any help, Click Need help? Click here.**

The screenshot shows a CRM interface with a list of deal cards on the left and a detailed view on the right. The deal cards include:

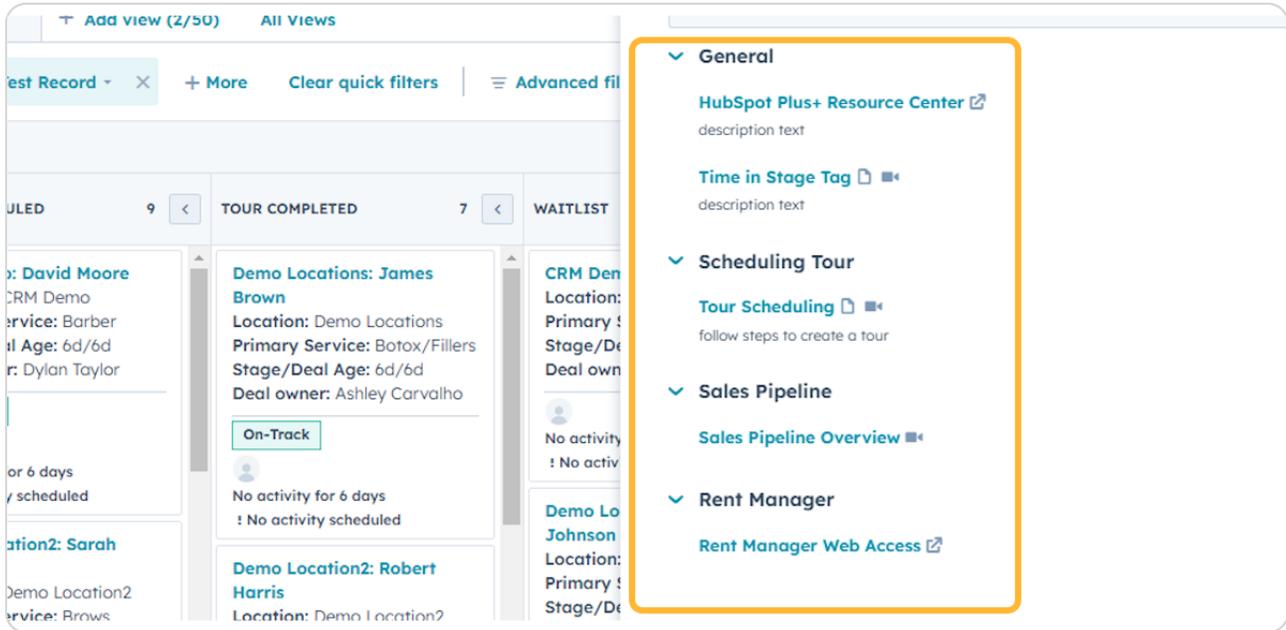
- Demo Locations: Jane Brown**  
Location: Demo Locations  
Primary Service: Permanent Makeup  
Stage/Deal Age: 6d/6d  
Deal owner: Ashley Carvalho  
No activity for 6 days ! No activity scheduled

The detailed view for **Contact: Laura Harris** includes:

- Tour Date: Schedule Now
- Toured Solo? -
- Deal Owner: Hannah Munoz
- Powered by Sola Salon's Deal Cards
- Deal Discovery
- Buttons: Save, Cancel, View record
- Need help? Click here.

## STEP 9

This will take you to a list of resources that you can and should reference



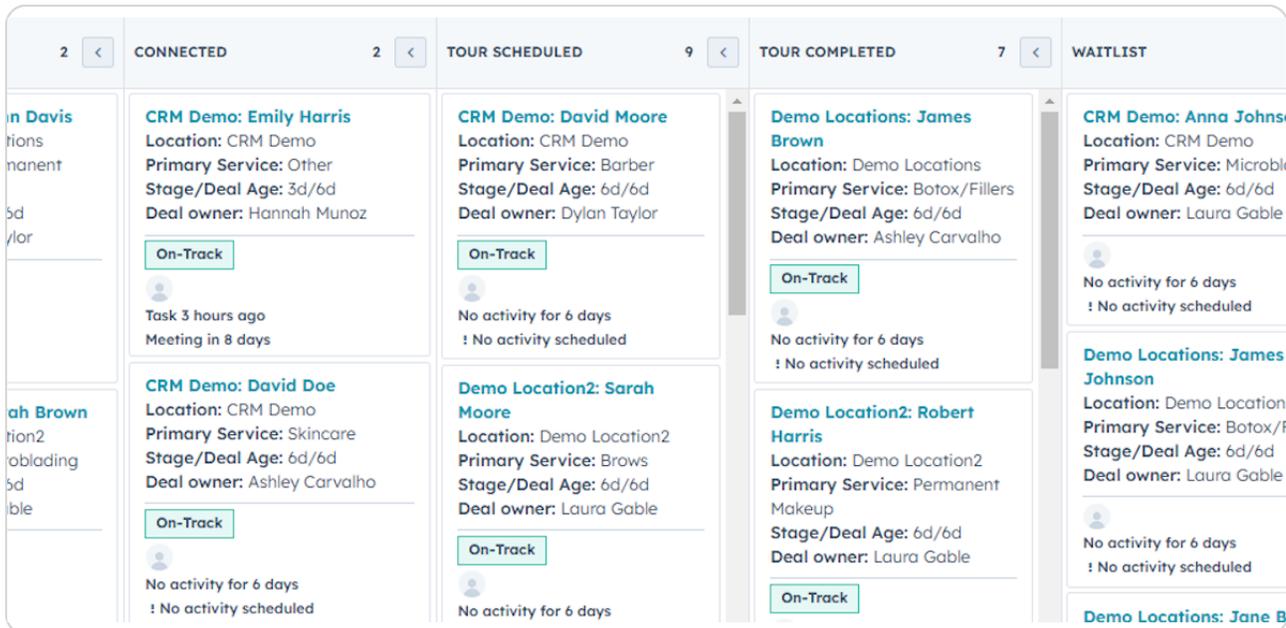
The screenshot shows a CRM interface with a sidebar menu on the right. The menu is highlighted with an orange border and contains the following sections:

- General**
  - [HubSpot Plus+ Resource Center](#) (with an external link icon)
  - description text
  - [Time in Stage Tag](#) (with a dropdown icon)
  - description text
- Scheduling Tour**
  - [Tour Scheduling](#) (with a dropdown icon)
  - follow steps to create a tour
- Sales Pipeline**
  - [Sales Pipeline Overview](#) (with a dropdown icon)
- Rent Manager**
  - [Rent Manager Web Access](#) (with an external link icon)

The main content area shows a list of deals with columns for 'SCHEDULED', 'TOUR COMPLETED', and 'WAITLIST'. Each deal card displays details such as 'Location', 'Primary Service', 'Stage/Deal Age', and 'Deal owner'. For example, one deal is for 'Demo Locations: James Brown' with 'Primary Service: Botox/Fillers' and 'Deal owner: Ashley Carvalho'. The deal is marked as 'On-Track' and has 'No activity for 6 days'.

## STEP 10

To edit the Deal from this view, Click Edit Deal



The screenshot shows a CRM interface with a grid of deal cards. The grid is organized into columns for 'CONNECTED', 'TOUR SCHEDULED', 'TOUR COMPLETED', and 'WAITLIST'. Each deal card displays details such as 'Location', 'Primary Service', 'Stage/Deal Age', and 'Deal owner'. For example, one deal is for 'CRM Demo: Emily Harris' with 'Primary Service: Other' and 'Deal owner: Hannah Munoz'. The deal is marked as 'On-Track' and has 'Task 3 hours ago' and 'Meeting in 8 days'.

Another deal is for 'CRM Demo: David Moore' with 'Primary Service: Barber' and 'Deal owner: Dylan Taylor'. The deal is marked as 'On-Track' and has 'No activity for 6 days'.

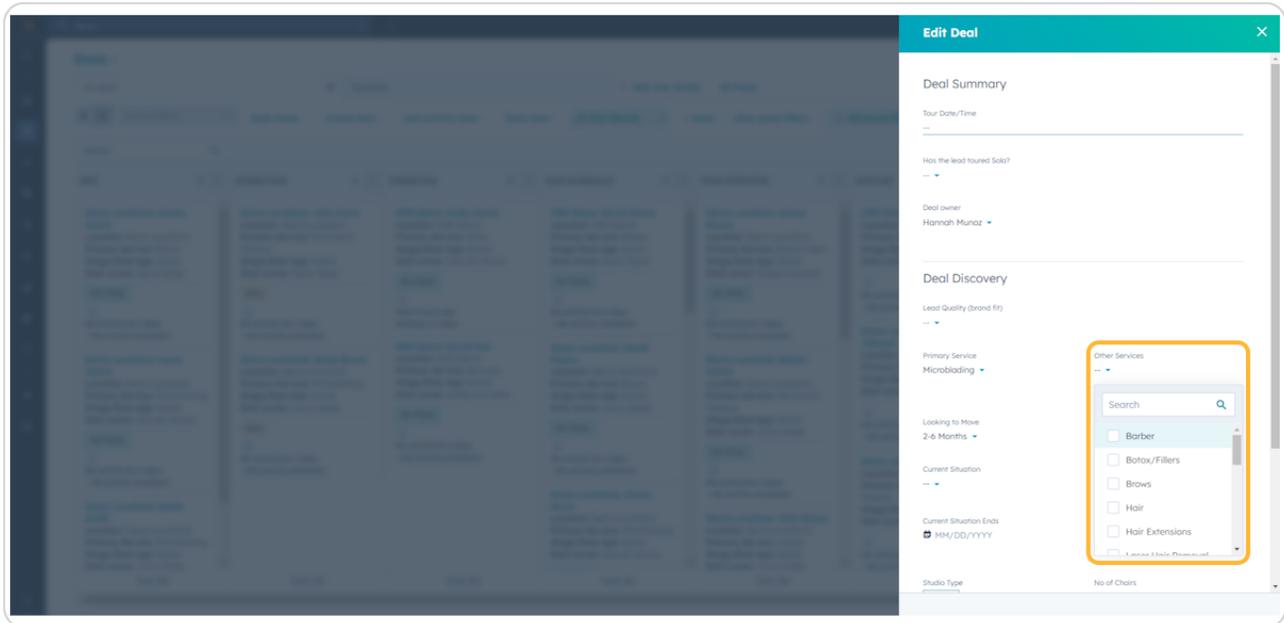
A third deal is for 'Demo Locations: James Brown' with 'Primary Service: Botox/Fillers' and 'Deal owner: Ashley Carvalho'. The deal is marked as 'On-Track' and has 'No activity for 6 days'.

The grid also shows deals in the 'WAITLIST' column, such as 'CRM Demo: Anna Johnson' with 'Primary Service: Microblading' and 'Deal owner: Laura Gable'. The deal is marked as 'On-Track' and has 'No activity for 6 days'.

## STEP 11

Click into the section that needs updated and make the necessary updates

Note: Changes will be saved automatically as you make them.



## STEP 12

When you're done updating the Deal, Click the X



## STEP 13

**To access the Deal Record, Click View record at the bottom of the Deal Card Preview**

The screenshot displays a 'Deal Card Preview' interface. On the left side, there are two activity status boxes, each stating 'No activity for 6 days' and 'No activity scheduled'. Below these, the 'Demo Locations' section lists 'Jane Brown' as the location, 'Permanent Makeup' as the primary service, and 'Ashley Carvalho' as the deal owner. The 'Stage/Deal Age' is noted as '6d/6d'. At the bottom left, the total value is shown as '\$0'. The main content area on the right includes a 'Tour Date' with a calendar icon and a 'Schedule Now' button. Below that, it shows 'Toured Sola?' with a minus sign and 'Deal Owner: Hannah Munoz'. A 'Need help? Click here.' button is positioned to the right of the deal owner information. At the bottom of the main area, there is a 'Deal Discovery' section with a dropdown arrow and a speech bubble icon. At the very bottom of the interface, there are three buttons: 'Save', 'Cancel', and 'View record'. The 'View record' button is highlighted with a yellow border.

## # Deal Record Overview

12 Steps

# STEP 14

## This is a Deal Record

The screenshot displays the HubSpot Deal Record interface for a deal named "Demo Locations: Laura Harris". The interface is divided into several sections:

- Left Sidebar (Details):** Contains deal information such as "Deal Tags" (On-Track), "Deal Origin" (Manual/HubSpot), "Location" (Demo Locations), "Deal name" (Demo Locations: Laura Harris), "Phone Number" (1-739-247-6767), "Email Address" (laura.harris@fakemail.com), "Lead Channel Type" (Outbound), "Lead Channel" (Web Search), "Original Traffic Source" (Offline sources), and "Lead source" (Edwards, Murray).
- Top Navigation:** Includes tabs for "Overview", "Activities", "Lead Source", and "Settings". A search bar for activities and a "Collapse all" button are also present.
- Activity Feed:** Shows a list of activities for "January 2025":
  - Deal activity:** Hannah Munoz moved deal from Connecting to New. View details (Jan 16, 2025 at 1:01 PM HST)
  - Deal activity:** Laura Gable moved deal to Connecting. View details (Jan 10, 2025 at 12:04 PM HST)
  - Deal activity:** This deal was created (Jan 10, 2025 at 12:04 PM HST)
- Right Sidebar (Contacts & Location):** Displays contact information for "Laura Harris" (fakemail.com, 1-739-247-6767, laura.harris@fakemail.com) and associated location "Demo Locations" (Leasing Manager: --). It also includes a "Send SMS" button and a "Contact's Recent Deals" section showing "No recent deals for contact".

## STEP 15

The left-hand side of the Deal Record contains all of the About information for the Deal.

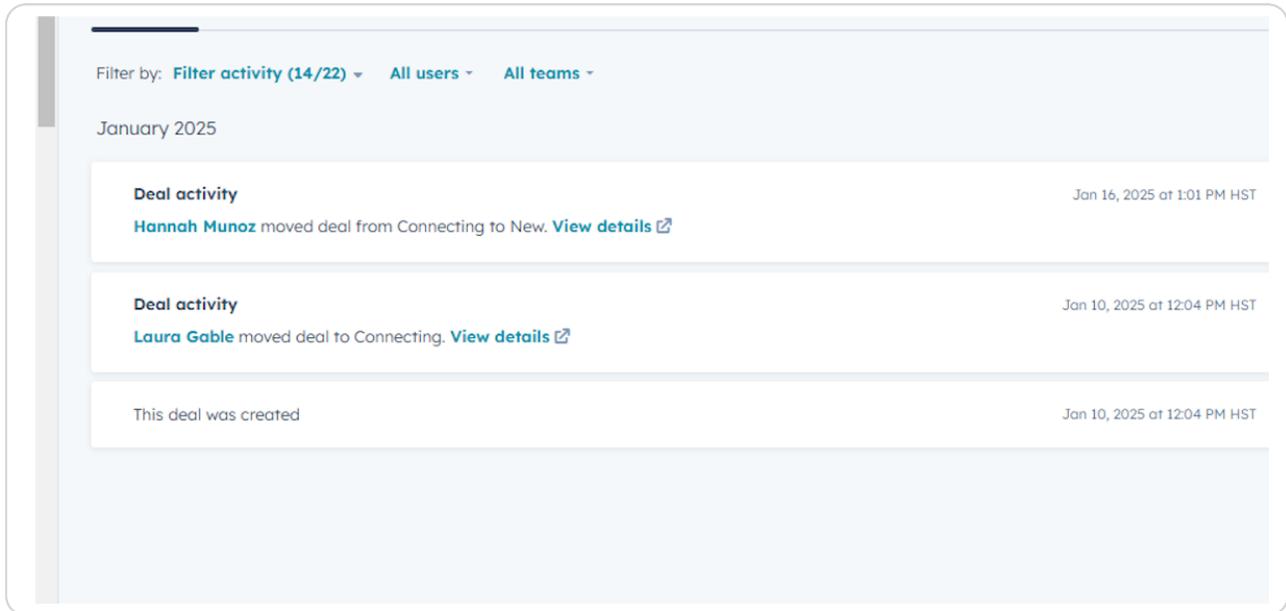
Note: You can create notes and tasks in the Deal Record from this side.

The screenshot displays the HubSpot Deal Record interface for a deal named "Demo Locations: Laura Harris". The interface is divided into several sections:

- Left-hand side (About information):** This section is highlighted with an orange border and contains the following details:
  - Amount: --
  - Close Date: MM/DD/YYYY
  - Stage: New
  - Pipeline: Leasing Pipeline
  - Actions: Note, Email, Call, Task, Meeting, More
  - Deal Tags: On-Track
  - Deal Origin: Manual/HubSpot
  - Location: Demo Locations
  - Deal name: Demo Locations: Laura Harris
  - Phone Number: 1-739-247-6767
  - Email Address: laura.harris@fakemail.com
  - Lead Channel Type: Outbound
  - Lead Channel: Web Search
  - Original Traffic Source: Offline sources
  - Deal number: 14199999999999999999
- Top navigation:** Overview, Activities, Lead Source, Settings.
- Activity section:** Search activities, Filter by: Filter activity (14/22), All users, All teams. A list of activities for January 2025:
  - Deal activity: Hannah Munoz moved deal from Connecting to New. View details
  - Deal activity: Laura Gable moved deal to Connecting. View details
  - This deal was created
- Right-hand side (Contact and Location information):**
  - Contacts (1): Laura Harris (fakemail.com, 1-739-247-6767, laura.harris@fakemail.com)
  - View associated contacts
  - Location (1): Demo Locations (Leasing Manager: --)
  - View associated Location
  - Salesmsg SMS (0): Send SMS button
  - Powered by Salesmsg SMS Texting & Calling
  - Contact's Recent Deals: No recent deals for contact. No other deals have been created for this contact.

## STEP 16

To update information about the Deal, Click into the section that needs updated and either choose from a dropdown of items or directly type in the information.

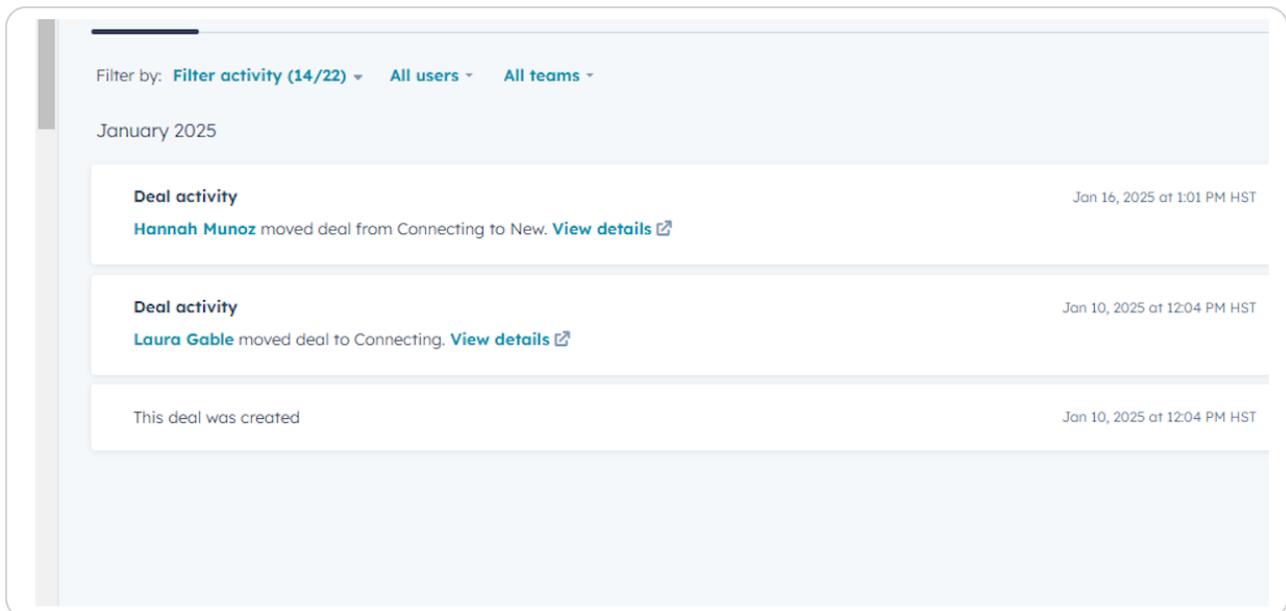


The screenshot shows a deal activity feed for January 2025. At the top, there are filter options: "Filter activity (14/22)", "All users", and "All teams". Below the filters, the month "January 2025" is displayed. The feed contains three activity items:

- Deal activity** (Jan 16, 2025 at 1:01 PM HST): Hannah Munoz moved deal from Connecting to New. [View details](#)
- Deal activity** (Jan 10, 2025 at 12:04 PM HST): Laura Gable moved deal to Connecting. [View details](#)
- This deal was created (Jan 10, 2025 at 12:04 PM HST)

## STEP 17

Click on Save



This screenshot is identical to the one in Step 16, showing the same deal activity feed for January 2025 with the same three activity items.

## STEP 18

### The center of the Deal Record holds the Overview and Activities tabs

The overview section will hold top level information about the Deal.

The screenshot shows the HubSpot Deal Record interface for a deal named "Demo Locations: Laura Harris". The "Overview" tab is selected and highlighted with a red box. The interface includes a left sidebar with navigation options, a top navigation bar with tabs for Overview, Activities, Lead Source, and Settings, and a main content area. The main content area is divided into sections: Stage Tracker, Highlights, Details, and Notes. The Stage Tracker shows the deal stage as "New" and "FOR 18 MINUTES". The Highlights section shows a table with columns for Deal Tags, Deal Status, Deal Origin, and Create Date. The Details section shows a table with columns for Location, Deal name, Phone Number, Email Address, Deal Origin, Lead Channel Type, Lead Channel, Channel Group (B), Original Traffic Source, Deal owner, Stage/Deal Age, Franchise Group, and Request ID. The right sidebar shows contact information for Laura Harris and associated locations.

## STEP 19

### Click on Activities

This close-up screenshot focuses on the "Highlights" and "Details" sections of the Deal Record interface. The "Highlights" section shows a table with columns for Deal Tags, Deal Status, Deal Origin, and Create Date. The "Details" section shows a table with columns for Location, Deal name, Phone Number, Email Address, Deal Origin, Lead Channel Type, Lead Channel, and Channel Group (B).

DEAL TAGS	DEAL STATUS	DEAL ORIGIN	CREATE DATE
On-Track	Open	Manual/Hubspot	01/10/2025 12:04 PM HST (6 day...

Location	Deal name	Phone Number	Email Address
Demo Locations	Demo Locations: Laura Harris	1-739-240-6917	laura.harris@fakemail.com

Deal Origin	Lead Channel Type	Lead Channel	Channel Group (B)
Manual/Hubspot	Outbound	Web Search	--

## STEP 20

The Activities tab will hold the specifics about the Deal. This includes notes, tasks, and meetings that have been scheduled (e.g. a tour)

The screenshot displays the HubSpot CRM interface for a deal named "Demo Locations: Laura Harris". The "Activities" tab is selected, showing a list of deal activities. The left sidebar contains deal details such as "Amount: --", "Close Date: MM/DD/YYYY", "Stage: New", and "Pipeline: Leasing Pipeline". The main content area shows a search bar for activities and a filter set to "Filter activity (14/22)". The activity list includes:

- Deal activity**: Hannah Munoz moved deal from Connecting to New. View details [View details](#) (Jan 16, 2025 at 1:01 PM HST)
- Deal activity**: Laura Gable moved deal to Connecting. View details [View details](#) (Jan 10, 2025 at 12:04 PM HST)
- This deal was created (Jan 10, 2025 at 12:04 PM HST)

The right sidebar shows contact information for Laura Harris, associated locations, and a "Send SMS" button.

## STEP 21

Click on Lead Source

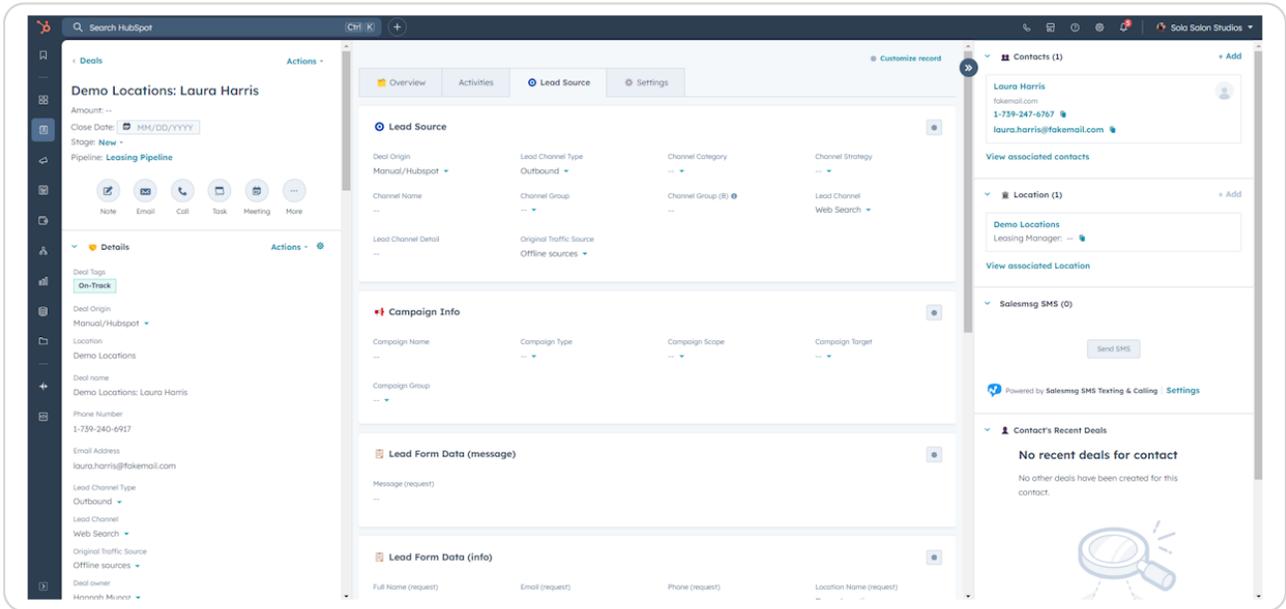
This close-up screenshot focuses on the activity list from the previous step. It shows the filter settings: "Filter by: Filter activity (14/22)", "All users", and "All teams". The date "January 2025" is displayed above the activity list. The activities are:

- Deal activity**: Hannah Munoz moved deal from Connecting to New. View details [View details](#) (Jan 16, 2025 at 1:01 PM HST)
- Deal activity**: Laura Gable moved deal to Connecting. View details [View details](#) (Jan 10, 2025 at 12:04 PM HST)
- This deal was created (Jan 10, 2025 at 12:04 PM HST)

## STEP 22

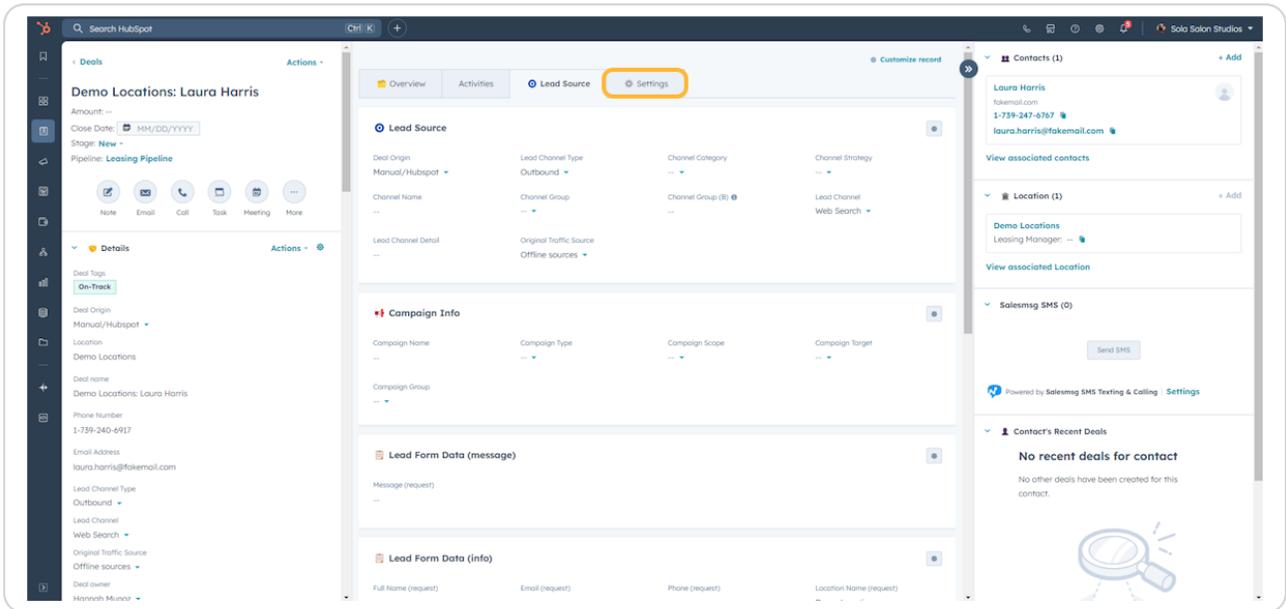
### The Lead Source tab will give you a breakdown of where the Deal came from

This section will show you information about the Deal Origin, Campaign Info, Lead Form Data, and Lead Source Traffic and UTMs.



## STEP 23

### Click on Settings



## STEP 24

The Settings tab will show you information about the Deal Record Security, Record Audit, and Record Settings

The screenshot displays the HubSpot CRM interface for a Deal Record. The main content area is divided into three sections:

- Record Security:** Shows Deal owner (Hannah Munoz), HubSpot team (solo\_corp\_dev), Shared teams, and Shared users (No user). The Owner assigned date is 01/10/2025 12:04 PM HST.
- Record Audit:** Shows Record ID (31799928521), Create date (01/10/2025), Created by user ID (Laura Gobie), and Last modified date (01/16/2025 1:20 PM HST). Other fields include Updated by user ID (Hannah Munoz), Record source (Import), Record source detail 1 (Solo Deal Dummy Data 1.10.25.csv), and Environment (request) (PRODUCTION).
- Record Settings:** Shows various configuration options, including config: HubSpot+ Enabled (sync) (Yes), config: Deal SLA Tags Enabled (Yes), config: Nurture Pipeline Enabled (Yes), and config: Enable Nurture Pipeline (Yes).

The right sidebar shows contact information for Laura Harris (fakemail.com, 1-739-240-6917, laura.harris@fakemail.com) and a message: "No recent deals for contact".

## STEP 25

**The right-hand side holds all the associated information. For example, if there is a Pro (Contact) associated with the Deal, you'll see this information on the right.**

Note: This is also where you can Send an SMS message through SalesMSG.

The screenshot displays the HubSpot CRM interface for a Deal record titled "Demo Locations: Laura Harris". The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons and a list of deal details including Deal Type (On-Track), Deal Origin (Manual/Hubspot), Location (Demo Locations), Deal name (Demo Locations: Laura Harris), Phone Number (1-739-240-6917), Email Address (laura.harris@fakemail.com), Lead Channel Type (Outbound), Lead Channel (Web Search), Original Traffic Source (Offline sources), and Deal owner (Hannah Munoz).
- Top Navigation:** Includes "Overview", "Activities", "Lead Source", and "Settings" tabs.
- Stage Tracker:** Shows the deal stage as "New" with a duration of "FOR 19 MINUTES".
- Highlights:** Displays deal tags (On-Track), deal status (Open), deal origin (Manual/Hubspot), and create date (01/10/2025 12:04 PM HST (6 day...)).
- Details Table:** A table with columns for Location, Deal name, Phone Number, Email Address, Deal Origin, Lead Channel Type, Lead Channel, Channel Group (B), Original Traffic Source, Deal owner, Create date, Close date, Deal Age, Stage/Deal Age, Franchise Group, and Request ID.
- Right Sidebar (highlighted in orange):** Contains contact information for Laura Harris (fakemail.com, 1-739-247-6767, laura.harris@fakemail.com), location details (Demo Locations, Leasing Manager), a "Send SMS" button, and a section for "Contact's Recent Deals" which states "No recent deals for contact".

## # Creating a Deal

10 Steps

## STEP 26

### Click on Deals

This screenshot shows a detailed view of a deal in HubSpot CRM. At the top, there are four columns: DEAL TAGS (On-Track), DEAL STATUS (Open), DEAL ORIGIN (Manual/Hubspot), and CREATE DATE (01/10/2025 12:04 PM HST (6 day...)). Below this is a 'Details' section with a grid of information:

Location	Deal name	Phone Number	Email Address
Demo Locations	Demo Locations: Laura Harris	1-739-240-6917	laura.harris@fakemail.com
Deal Origin	Lead Channel Type	Lead Channel	Channel Group (B)
Manual/Hubspot	Outbound	Web Search	--

## STEP 27

### You'll be back in the Deal overview

This screenshot shows the 'Deals' overview page in HubSpot CRM. The page is organized into a pipeline view with 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. Each column contains a list of deal cards. Each card displays the deal name, location, primary service, deal owner, and status (e.g., On-Track, Slow). The bottom of each column shows a 'Total: \$0' value. The interface includes search filters, a sidebar with navigation icons, and a top navigation bar with 'Actions', 'Export', and 'Create deal' buttons.

## STEP 28

### Click on Create deal

	2 <	CONNECTED	2 <	TOUR SCHEDULED	9 <	TOUR COMPLETED	7 <	WAITLIST
<b>Emily Harris</b> Location: CRM Demo Primary Service: Other Stage/Deal Age: 3d/6d Deal owner: Hannah Munoz <b>On-Track</b> Task 3 hours ago Meeting in 8 days	<b>David Moore</b> Location: CRM Demo Primary Service: Barber Stage/Deal Age: 6d/6d Deal owner: Dylan Taylor <b>On-Track</b> No activity for 6 days ! No activity scheduled	<b>James Brown</b> Location: Demo Locations Primary Service: Botox/Fillers Stage/Deal Age: 6d/6d Deal owner: Ashley Carvalho <b>On-Track</b> No activity for 6 days ! No activity scheduled	<b>Anna Johnson</b> Location: CRM Demo Primary Service: Microblading Stage/Deal Age: 6d/6d Deal owner: Laura Gable No activity for 6 days ! No activity scheduled					
<b>David Doe</b> Location: CRM Demo Primary Service: Skincare Stage/Deal Age: 6d/6d Deal owner: Ashley Carvalho <b>On-Track</b> No activity for 6 days ! No activity scheduled	<b>Sarah Moore</b> Location: Demo Location2 Primary Service: Brows Stage/Deal Age: 6d/6d Deal owner: Laura Gable <b>On-Track</b> No activity for 6 days	<b>Robert Harris</b> Location: Demo Location2 Primary Service: Permanent Makeup Stage/Deal Age: 6d/6d Deal owner: Laura Gable <b>On-Track</b>	<b>James Johnson</b> Location: Demo Location Primary Service: Botox/Fillers Stage/Deal Age: 6d/6d Deal owner: Laura Gable No activity for 6 days ! No activity scheduled					
			<b>Jane B</b>					

## STEP 29

### A form will appear for you to fill out

The screenshot shows the HubSpot Deals pipeline interface. A 'Create deal' form is overlaid on the right side of the screen. The form contains the following fields:

- Deal name \*
- Pipeline \* (Leasing Pipeline)
- Deal stage \* (New)
- Email Address
- Phone Number
- Primary Service
- Other Services
- Lead Channel Type \*
- Lead Channel \*

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

## STEP 30

Fill out the form with the appropriate information

The screenshot shows the HubSpot CRM interface. On the left, a deal pipeline is visible with stages: NEW (3), CONNECTING (2), CONNECTED (2), TOUR SCHEDULED (9), TOUR COMPLETED (7), and WAITLIST. The 'Create deal' form on the right is highlighted with an orange box and contains the following information:

- Deal name: Hannah Test Demo
- Pipeline: Leasing Pipeline
- Deal stage: New
- Email Address: hannah@demo.com
- Phone Number: 123-123-1234
- Primary Service: Hair
- Other Services: Botox/Fillers
- Lead Channel Type: Outbound
- Lead Channel: External Referral

## STEP 31

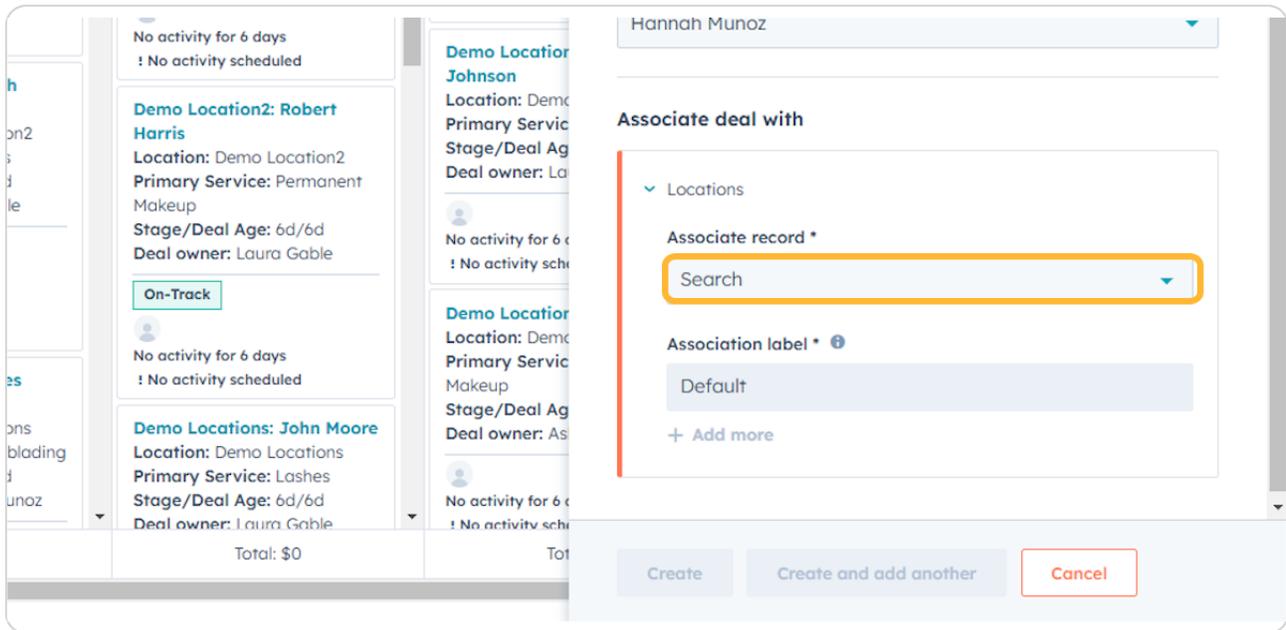
At the bottom of the form is a Location drop down

The screenshot shows the HubSpot CRM interface, focusing on the 'Create deal' form. The 'Associate deal with' section is highlighted with an orange box and contains the following information:

- Associate record: Search
- Association label: Default

## STEP 32

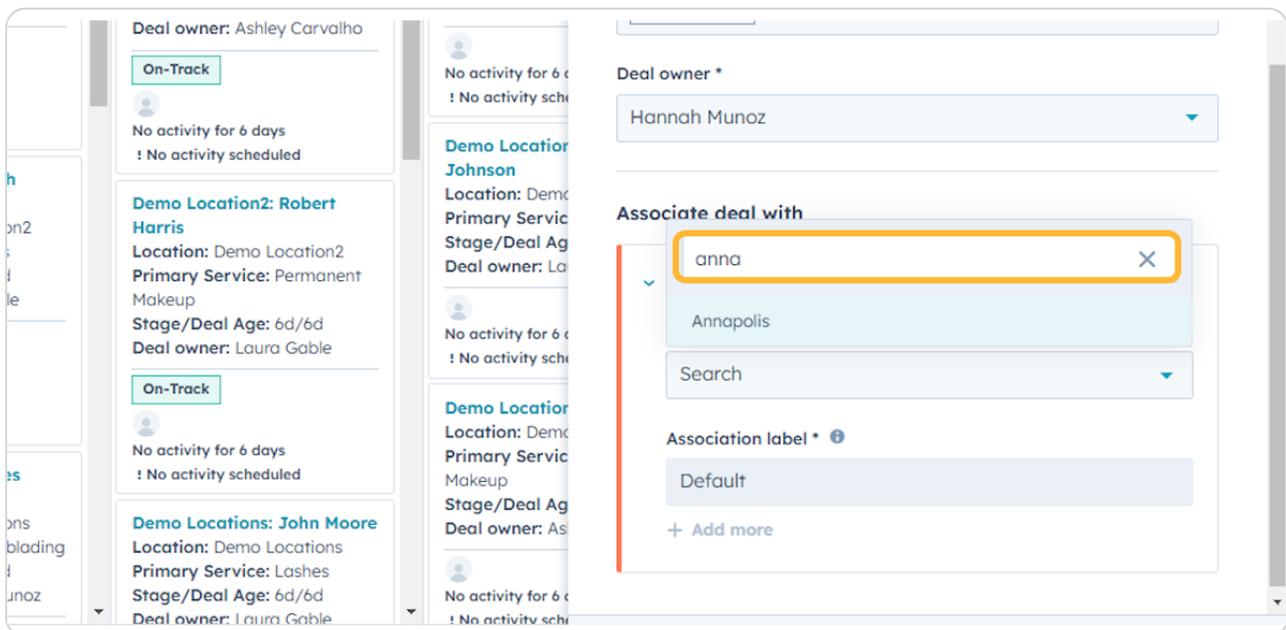
### Click on the Search dropdown



The screenshot shows a software interface with a sidebar on the left containing deal information for 'Demo Location2: Robert Harris' and 'Demo Locations: John Moore'. The main area displays a form for 'Associate deal with' with a dropdown menu for 'Associate record \*' highlighted in orange. The dropdown menu is open, showing a search bar and a 'Search' button. Below the search bar, there is a text input field for 'Association label \*' with the value 'Default' and a '+ Add more' link. At the bottom of the form, there are three buttons: 'Create', 'Create and add another', and 'Cancel'.

## STEP 33

### Search for the Location



The screenshot shows the same software interface as in Step 32. The 'Associate record \*' dropdown menu is now open, and the search bar contains the text 'anna'. The dropdown list shows 'Annapolis' as the selected option. The 'Search' button is still visible below the dropdown. The rest of the interface, including the sidebar and the 'Associate deal with' form, remains the same.

## STEP 34

### Choose the Location you need

Hannah Munoz

Associate deal with

anna

Annapolis

Search

Association label \*

Default

+ Add more

Create Create and add another Cancel

## STEP 35

### Click on Create

2 CONNECTED 2 TOUR SCHEDULED 9 TOUR COMPLETED 7 WAITLIST

CRM Demo: Emily Harris  
Location: CRM Demo  
Primary Service: Other  
Stage/Deal Age: 3d/6d  
Deal owner: Hannah Munoz  
On-Track  
Task 3 hours ago  
Meeting in 8 days

CRM Demo: David Moore  
Location: CRM Demo  
Primary Service: Barber  
Stage/Deal Age: 6d/6d  
Deal owner: Dylan Taylor  
On-Track  
No activity for 6 days  
! No activity scheduled

Demo Locations: James Brown  
Location: Demo Locations  
Primary Service: Botox/Fillers  
Stage/Deal Age: 6d/6d  
Deal owner: Ashley Carvalho  
On-Track  
No activity for 6 days  
! No activity scheduled

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

CRM Demo: David Doe  
Location: CRM Demo  
Primary Service: Skincare  
Stage/Deal Age: 6d/6d  
Deal owner: Ashley Carvalho  
On-Track  
No activity for 6 days  
! No activity scheduled

Demo Location2: Sarah Moore  
Location: Demo Location2  
Primary Service: Brows  
Stage/Deal Age: 6d/6d  
Deal owner: Laura Gable  
On-Track  
No activity for 6 days

Demo Location2: Robert Harris  
Location: Demo Location2  
Primary Service: Permanent Makeup  
Stage/Deal Age: 6d/6d  
Deal owner: Laura Gable  
On-Track

Demo Location Johnson  
Location: Demo...  
Primary Service...  
Stage/Deal Age...  
Deal owner: La...  
No activity for 6...  
! No activity sch...  
Demo Location

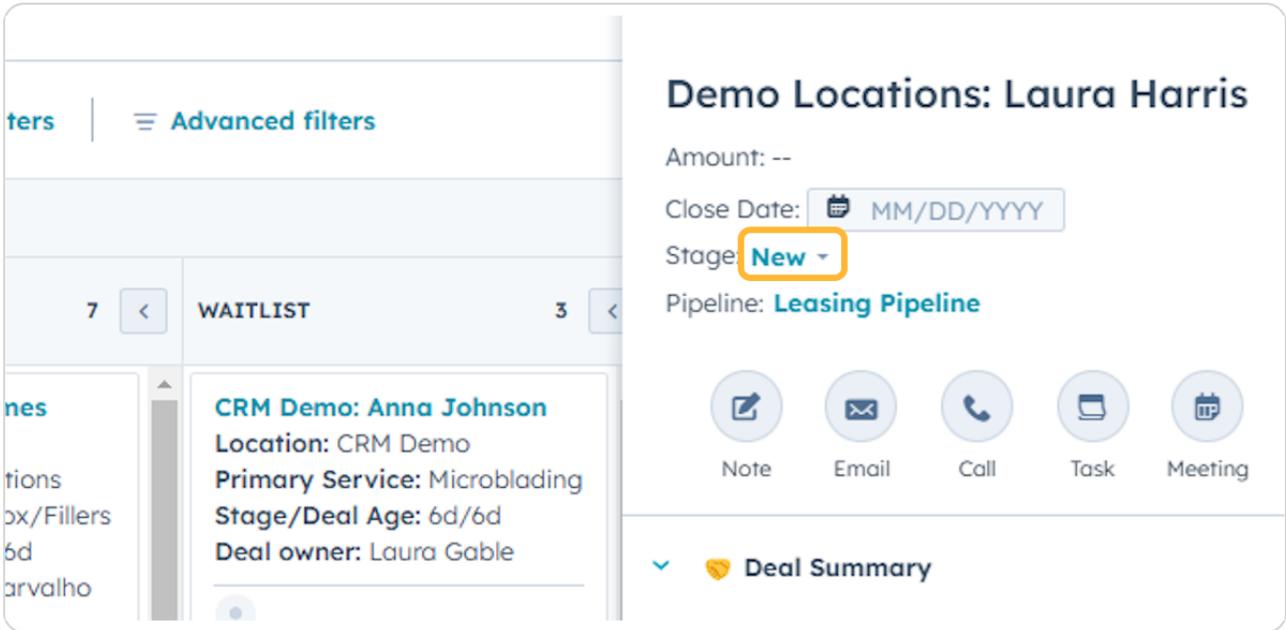
## STEP 36

To update a Deal stage, Click on a Deal Card

The screenshot displays a grid of deal cards in a CRM system. A vertical sidebar on the left contains navigation icons. The main area shows several deal cards, each with a status indicator at the top (e.g., 'On-Track' in a green box or 'Slow' in an orange box). The cards contain details such as deal owner, location, primary service, and stage/deal age. One card, 'Demo Locations: Laura Harris', is highlighted with an orange border. Other cards include 'Demo Location2: Sarah Brown', 'CRM Demo: David Doe', and 'Demo Location2: Sara Moore'. Each card also indicates activity status, such as 'No activity for 6 days' or 'Task 3 hours ago'.

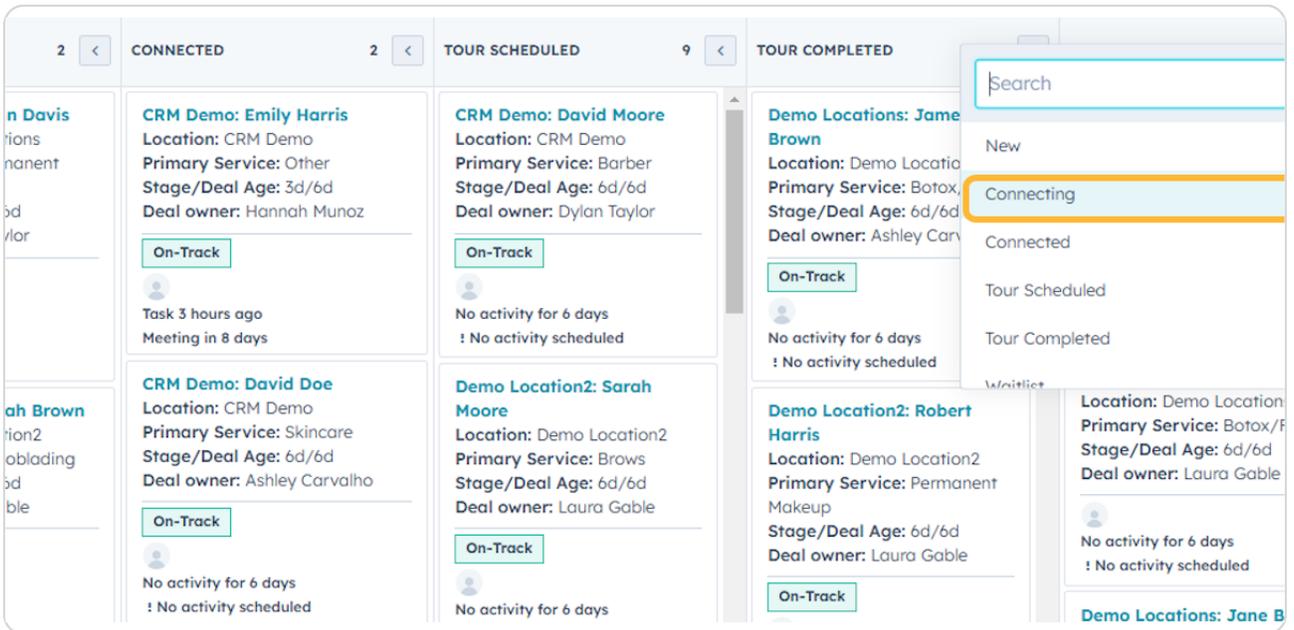
### STEP 37

In the Deal Card Preview, next to Stage, Click the Dropdown



### STEP 38

Select the stage the Deal should be in



## STEP 39

The other way to update Deal stages is to Click on View record in the Deal Card Preview

The screenshot displays a CRM deal pipeline with four stages: CONNECTED (2 deals), TOUR SCHEDULED (9 deals), TOUR COMPLETED (7 deals), and WAITLIST. Each deal card provides details such as name, location, primary service, stage/deal age, and deal owner. Deal cards in the 'CONNECTED' and 'TOUR SCHEDULED' stages include an 'On-Track' status and activity logs. Deal cards in the 'TOUR COMPLETED' and 'WAITLIST' stages show 'No activity for 6 days' and 'No activity scheduled'.

Stage	Deal Name	Location	Primary Service	Stage/Deal Age	Deal owner	Status	Activity
CONNECTED	CRM Demo: Emily Harris	CRM Demo	Other	3d/6d	Hannah Munoz	On-Track	Task 3 hours ago Meeting in 8 days
	CRM Demo: David Doe	CRM Demo	Skincare	6d/6d	Ashley Carvalho	On-Track	No activity for 6 days ! No activity scheduled
TOUR SCHEDULED	CRM Demo: David Moore	CRM Demo	Barber	6d/6d	Dylan Taylor	On-Track	No activity for 6 days ! No activity scheduled
	Demo Location2: Sarah Moore	Demo Location2	Brows	6d/6d	Laura Gable	On-Track	No activity for 6 days
TOUR COMPLETED	Demo Locations: James Brown	Demo Locations	Botox/Fillers	6d/6d	Ashley Carvalho	On-Track	No activity for 6 days ! No activity scheduled
	Demo Location2: Robert Harris	Demo Location2	Permanent Makeup	6d/6d	Laura Gable	On-Track	No activity for 6 days ! No activity scheduled
WAITLIST	CRM Demo: Anna Johnson	CRM Demo	Microblading	6d/6d	Laura Gable	No activity for 6 days ! No activity scheduled	No activity for 6 days ! No activity scheduled
	Demo Locations: James Johnson	Demo Location	Botox/Fillers	6d/6d	Laura Gable	No activity for 6 days ! No activity scheduled	No activity for 6 days ! No activity scheduled

## STEP 40

Click on the Stage dropdown in the Deal Record

The screenshot shows the activity history for a deal in January 2025. The filter is set to 'Filter activity (14/22)', 'All users', and 'All teams'. The activity log shows three entries: Hannah Munoz moving the deal from Connecting to New, Laura Gable moving the deal to Connecting, and the deal being created.

Activity	Date and Time
Deal activity Hannah Munoz moved deal from Connecting to New. <a href="#">View details</a>	Jan 16, 2025 at 1:01 PM HST
Deal activity Laura Gable moved deal to Connecting. <a href="#">View details</a>	Jan 10, 2025 at 12:04 PM HST
This deal was created	Jan 10, 2025 at 12:04 PM HST

## STEP 41

### Update the Stage

The screenshot displays the Salesforce HubSpot interface for a deal record titled "Demo Locations: Laura Harris". The interface is divided into several sections:

- Left Sidebar (Actions):** A dropdown menu is open, showing options like "New", "Connecting" (highlighted with a yellow circle), "Connected", "Deal To", "On-Track", "Tour Scheduled", "Tour Completed", "Deal Or", "Manual/HubSpot", "Location", "Demo Locations", "Deal name", "Demo Locations: Laura Harris", "Phone Number", "1-739-240-6917", "Email Address", "laura.harris@fakemail.com", "Lead Channel Type", "Outbound", "Lead Channel", "Web Search", "Original Traffic Source", "Offline sources", "Deal owner", and "Hannah Munoz".
- Top Navigation:** Includes "Overview", "Activities", "Lead Source", and "Settings".
- Stage Tracker:** Shows the deal stage as "New" with a "FOR 30 MINUTES" timer.
- Highlights:** A table with columns: DEAL TAGS (On-Track), DEAL STATUS (Open), DEAL ORIGIN (Manual/Hubspot), and CREATE DATE (01/10/2025 12:04 PM HST (6 day...)).
- Details:** A table with columns: Location (Demo Locations), Deal name (Demo Locations: Laura Harris), Phone Number (1-739-240-6917), Email Address (laura.harris@fakemail.com), Deal Origin (Manual/Hubspot), Lead Channel Type (Outbound), Lead Channel (Web Search), Channel Group (B), Original Traffic Source (Offline sources), Deal owner (Hannah Munoz), Create date (01/10/2025), Close date (MM/DD/YYYY), Deal Age (Ad), Stage/Deal Age (0d/Ad), Franchise Group, and Request ID.
- Right Sidebar (Contacts):** Shows contact information for Laura Harris (fakemail.com, 1-739-240-6767, laura.harris@fakemail.com) and sections for "View associated contacts", "Location (1)", "Salesmsg SMS (0)", and "Contact's Recent Deals" (No recent deals for contact).

## STEP 42

### Congratulations! You've finished the Deal Record Overview

