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:

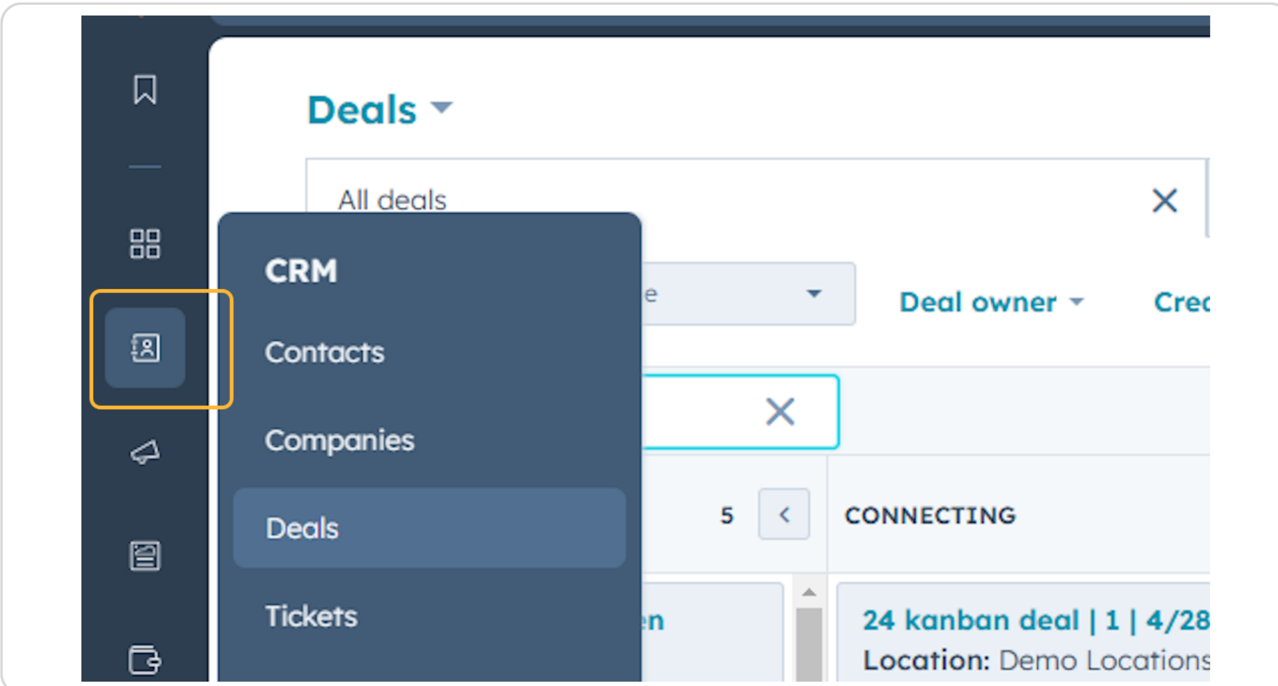
- Accessing Deals
- Accessing the Deal Card
- Overview of the Deal Record
- Creating a Deal
- Updating Deal Stages

42 Steps [View most recent version]

Created by	Creation Date	Last Updated
Doug Davidoff	Dec 04, 2024	Jan 16, 2025

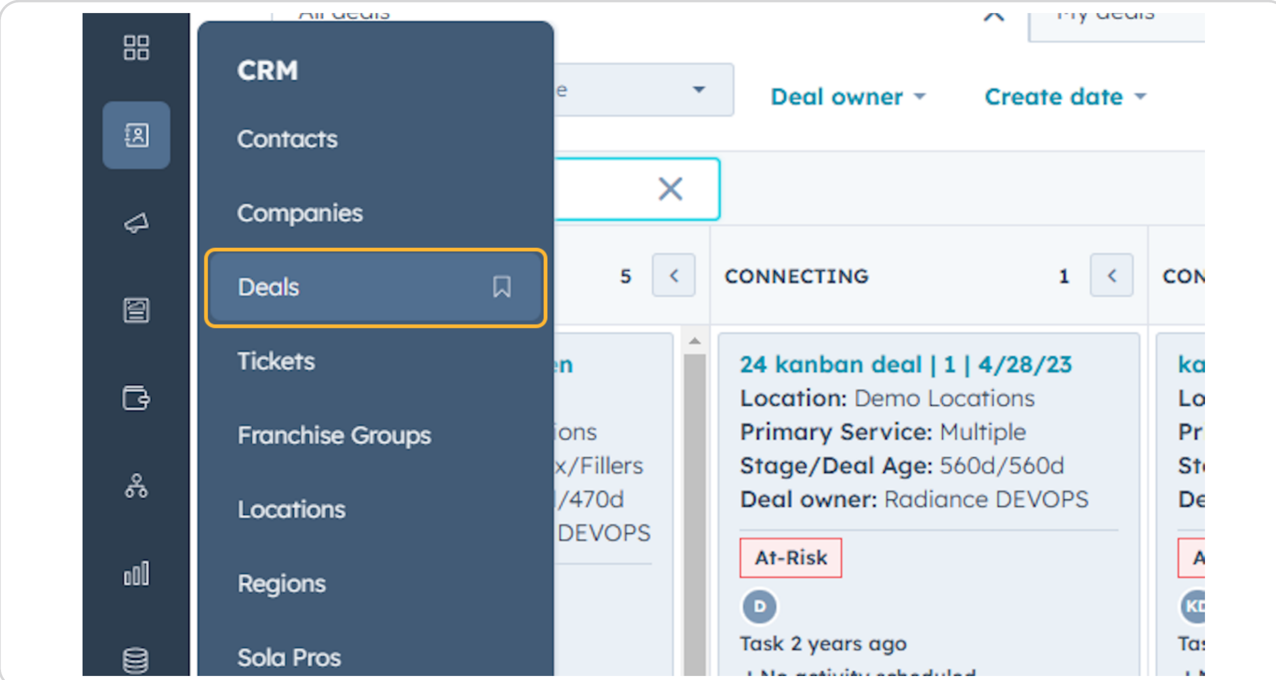
STEP 1

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



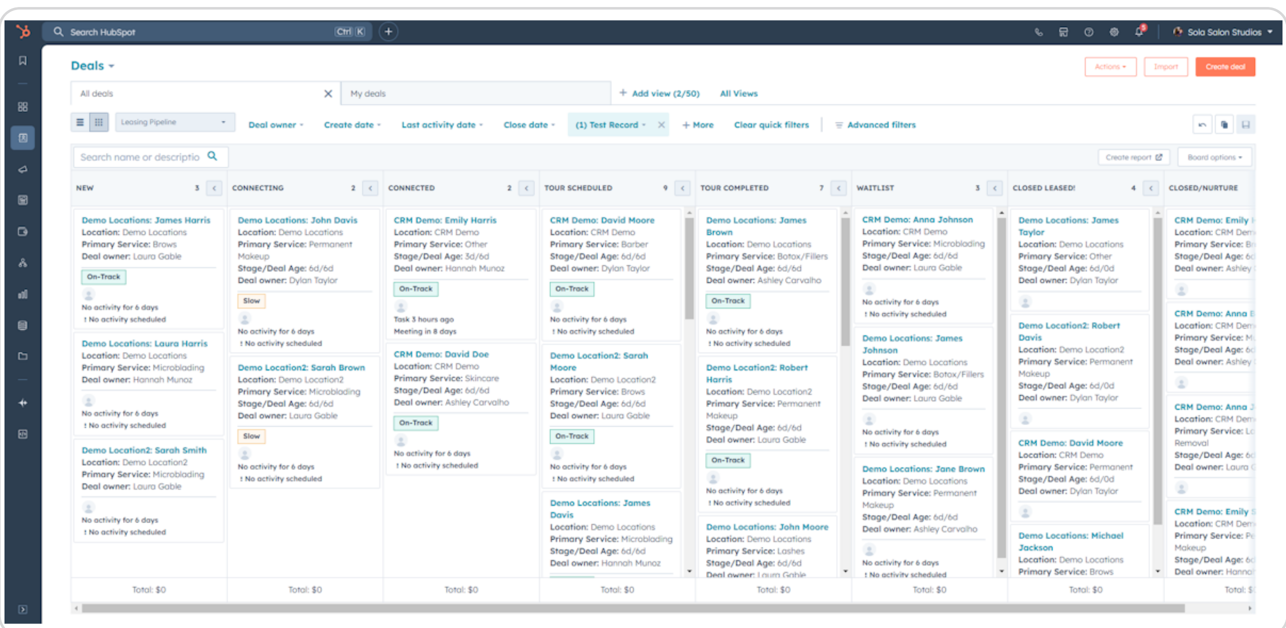
STEP 2

Click on Deals



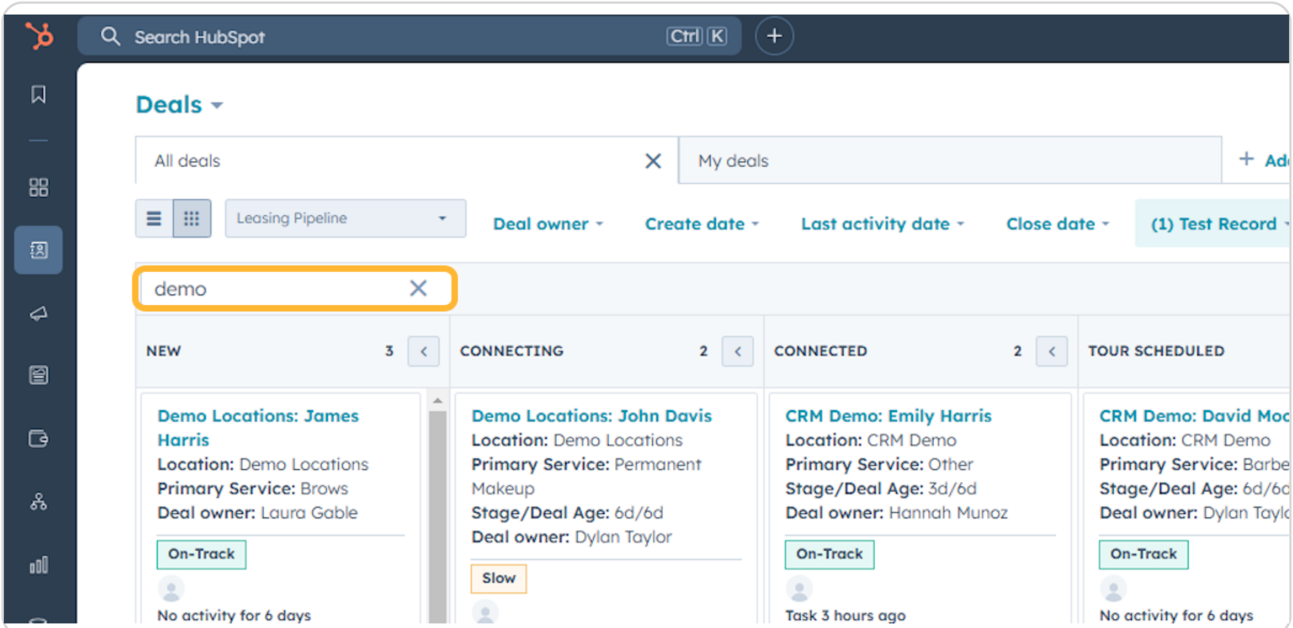
STEP 3

This will bring you to an overview of Deals



STEP 4

To find a specific Deal, you can search for it

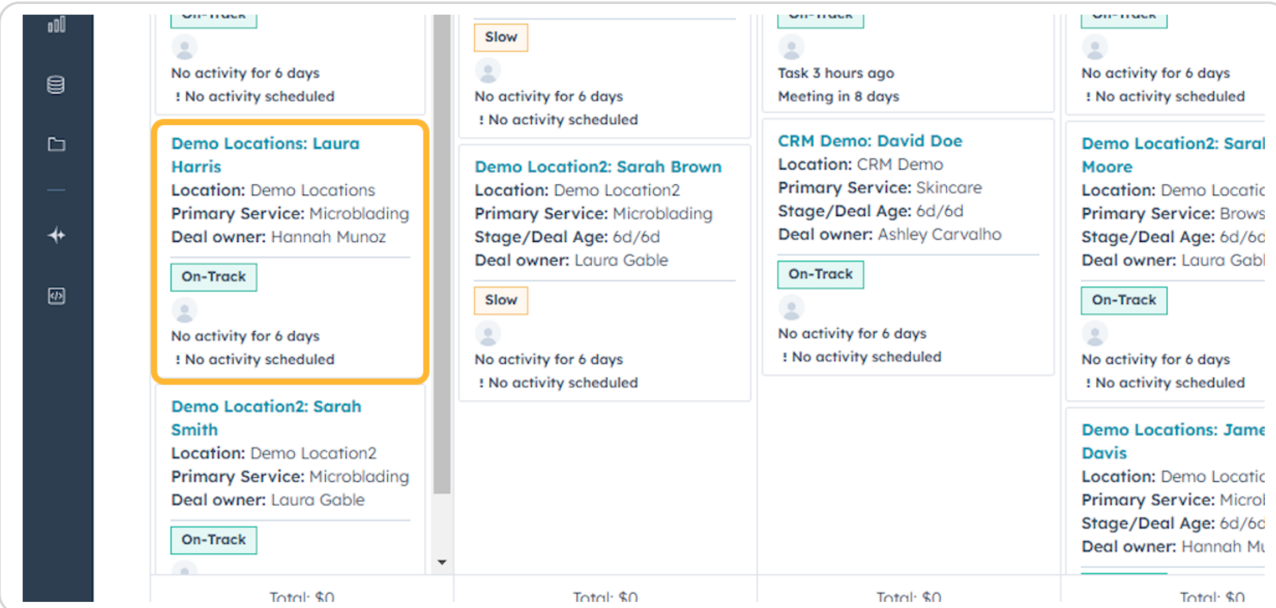


Accessing the Deal Card Preview

9 Steps

STEP 5

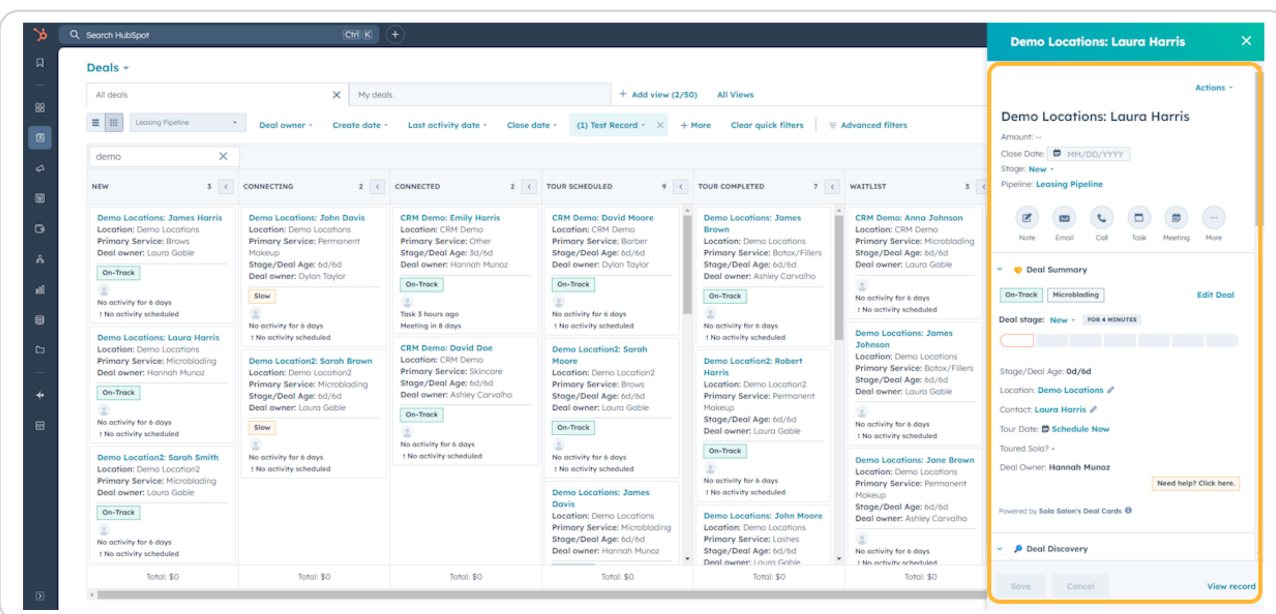
To open the Deal Card Preview, Click on the Deal Card



STEP 6

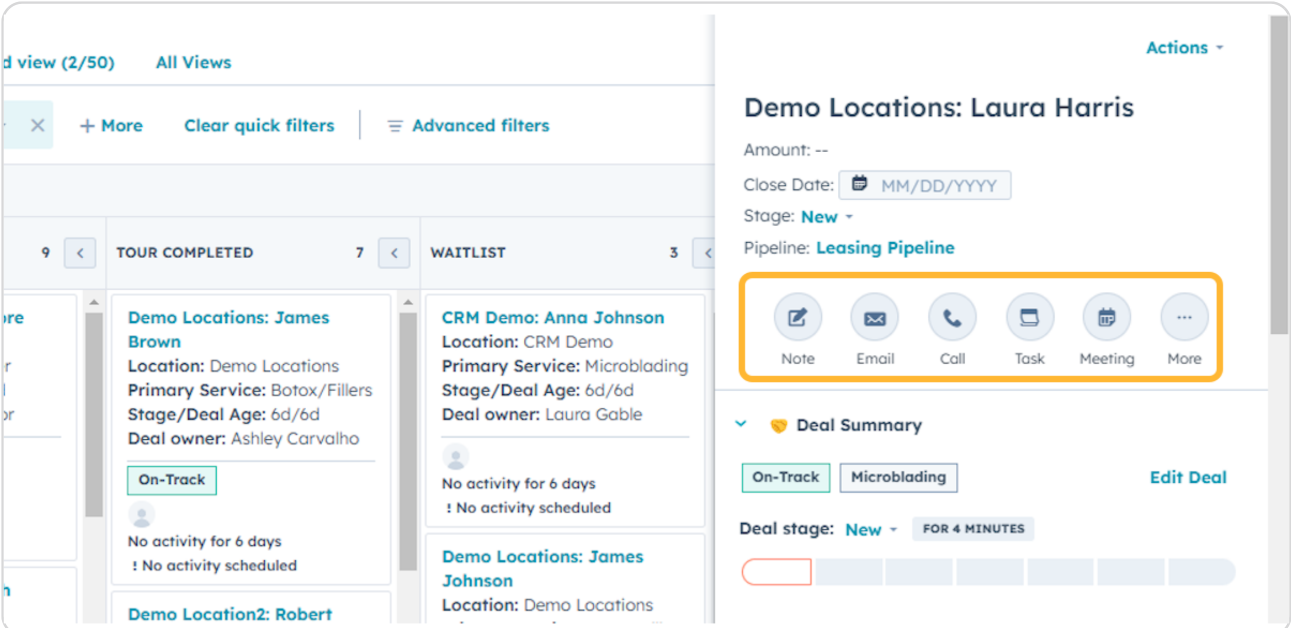
The Deal Card Preview will open

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.



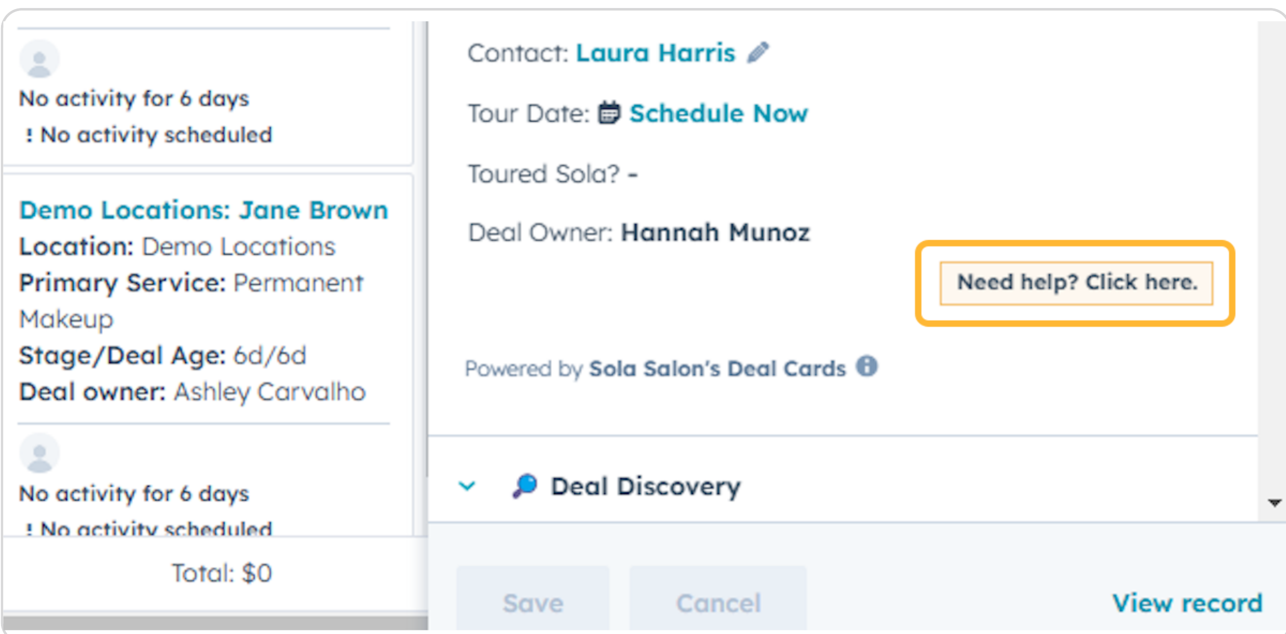
STEP 7

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



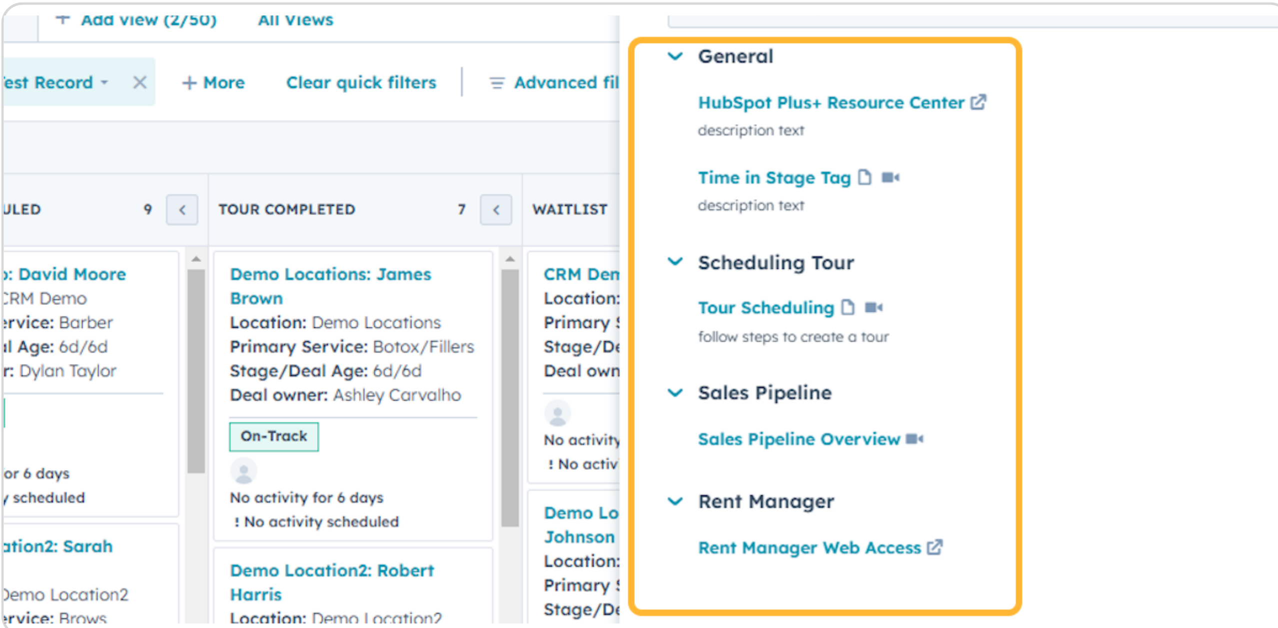
STEP 8

<u>If you need any help, Click Need help? Click here.</u>



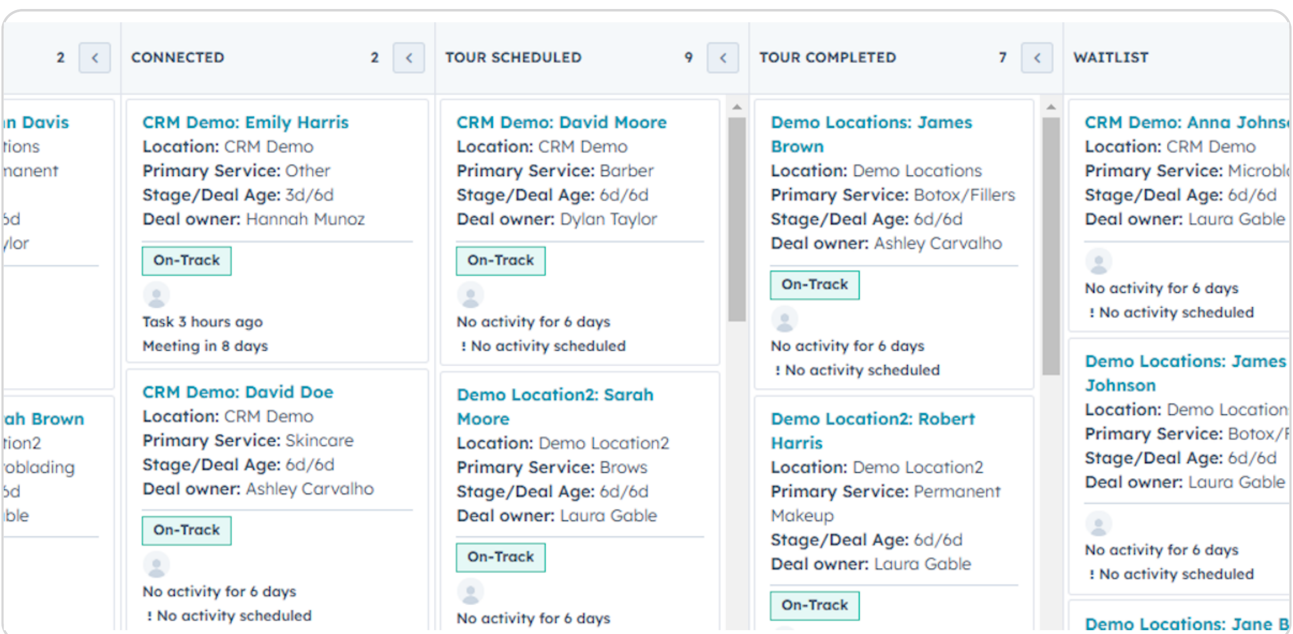
STEP 9

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



STEP 10

To edit the Deal from this view, Click Edit Deal



STEP 11

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

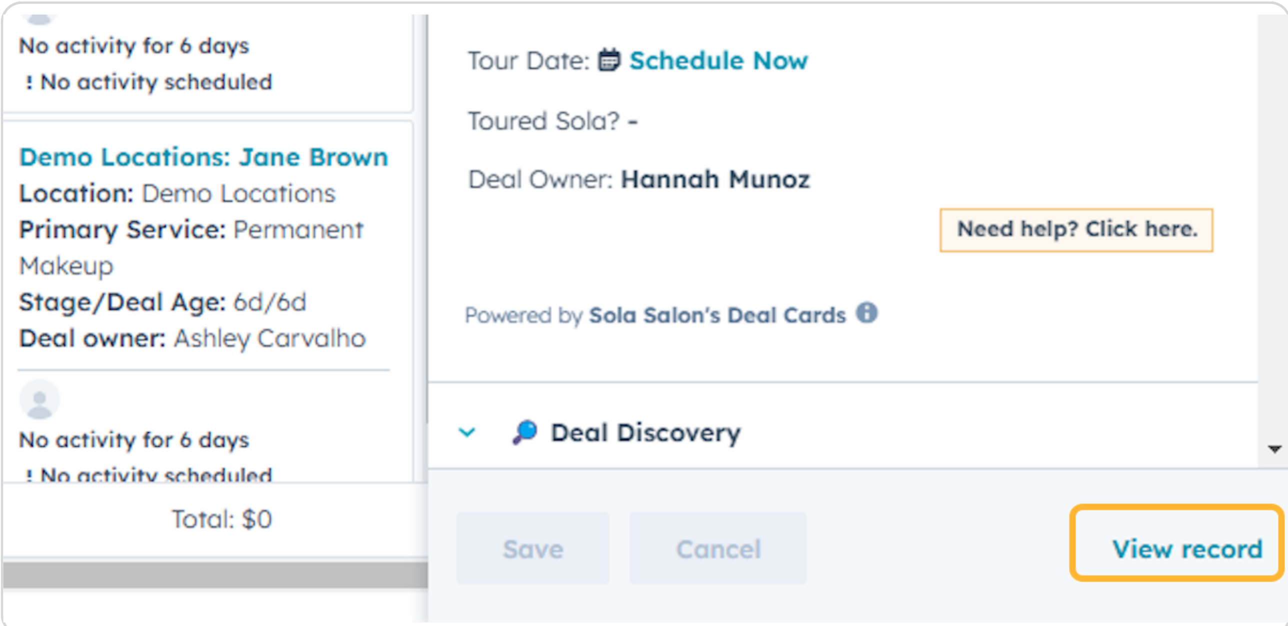
Note: Changes will be saved automatically as you make them.

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

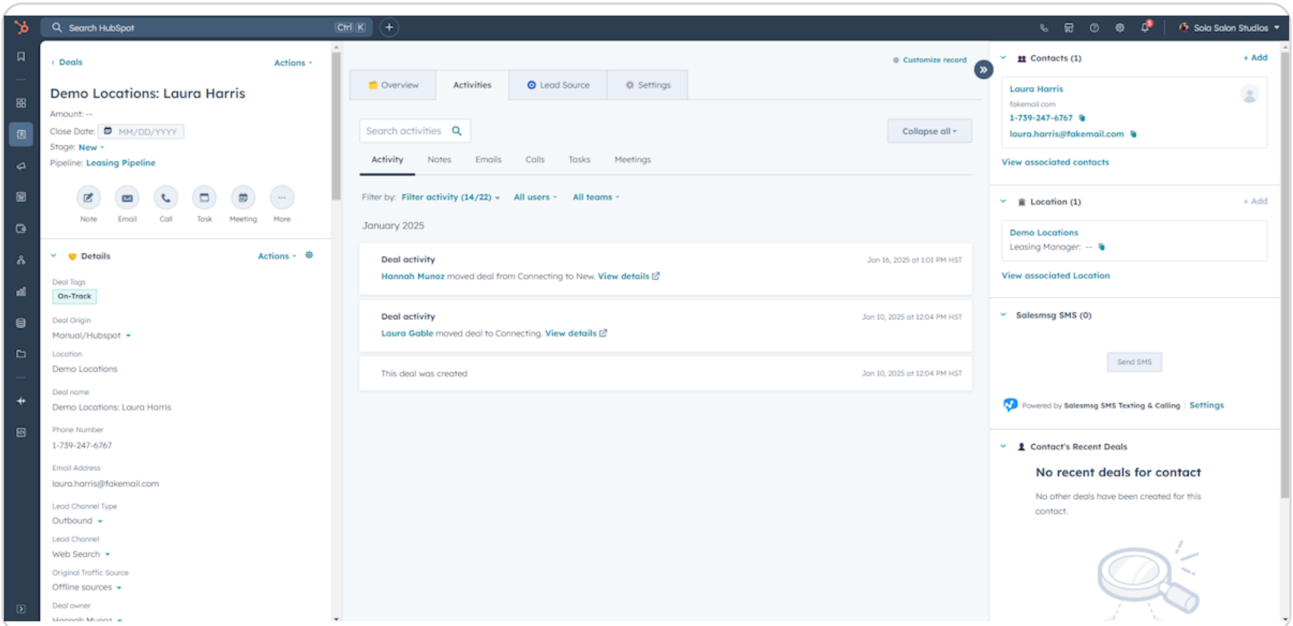


Deal Record Overview

12 Steps

STEP 14

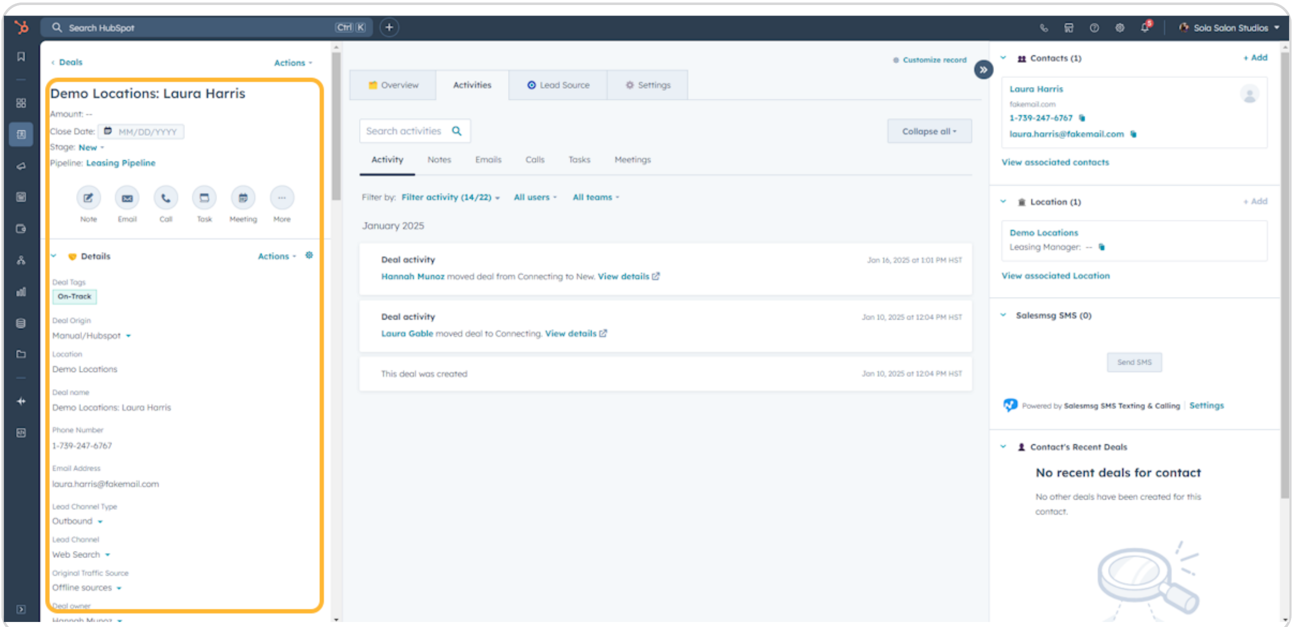
This is a Deal Record



STEP 15

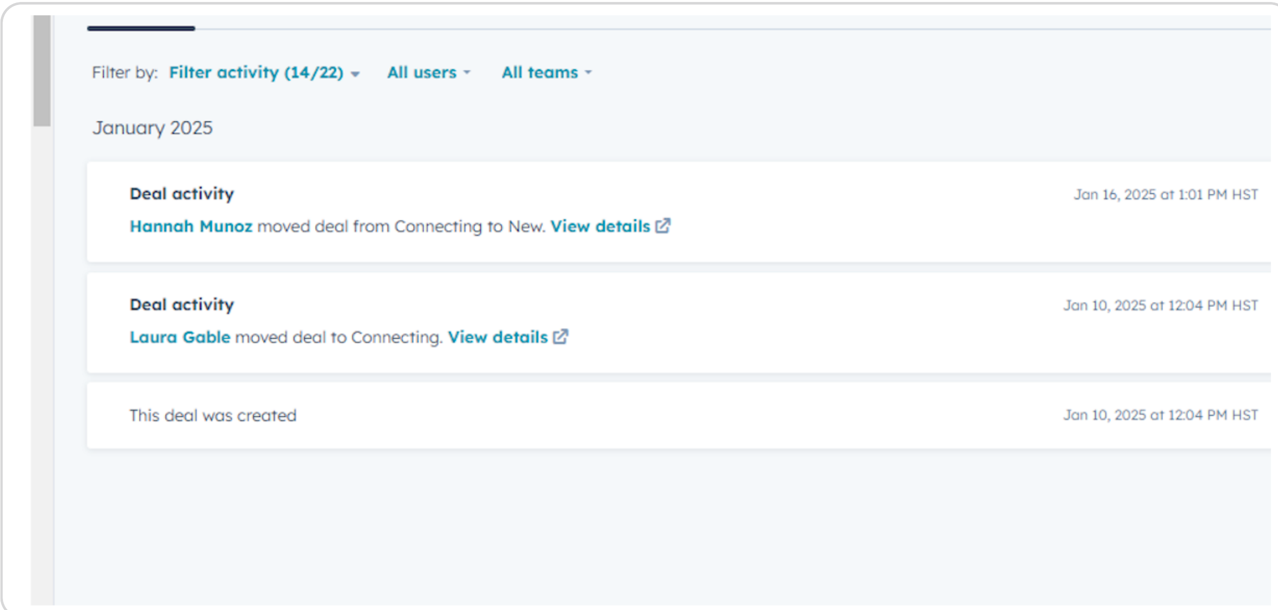
The left-hand side of the Deal Record contains all of the About information for the Deal.

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



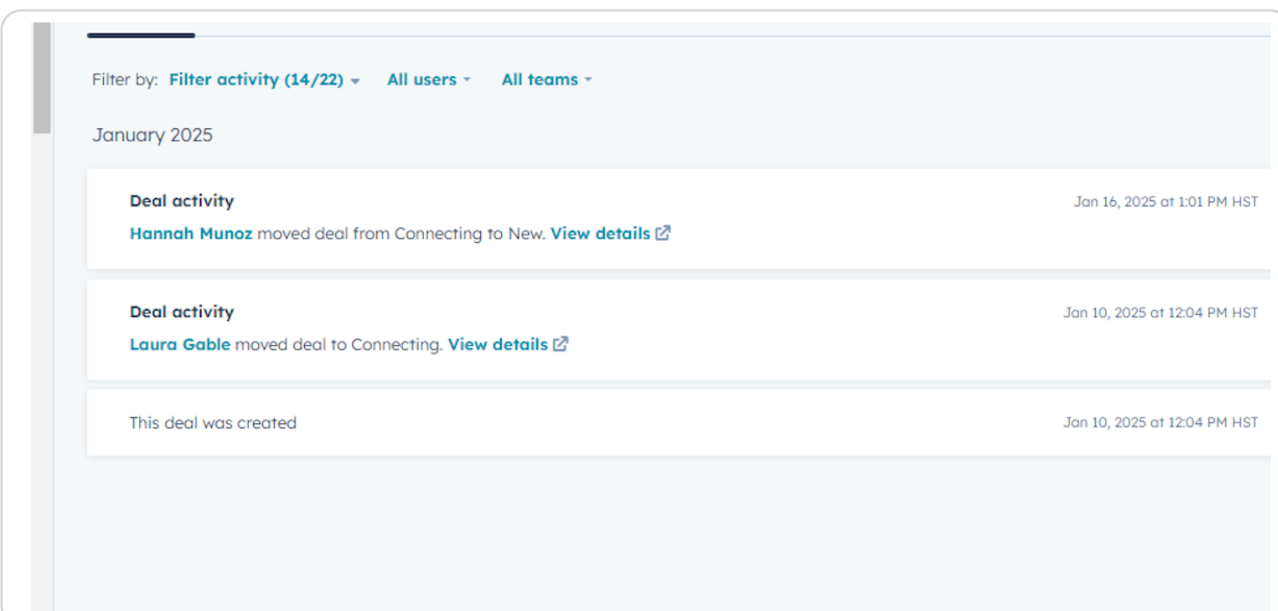
STEP 16

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.



STEP 17

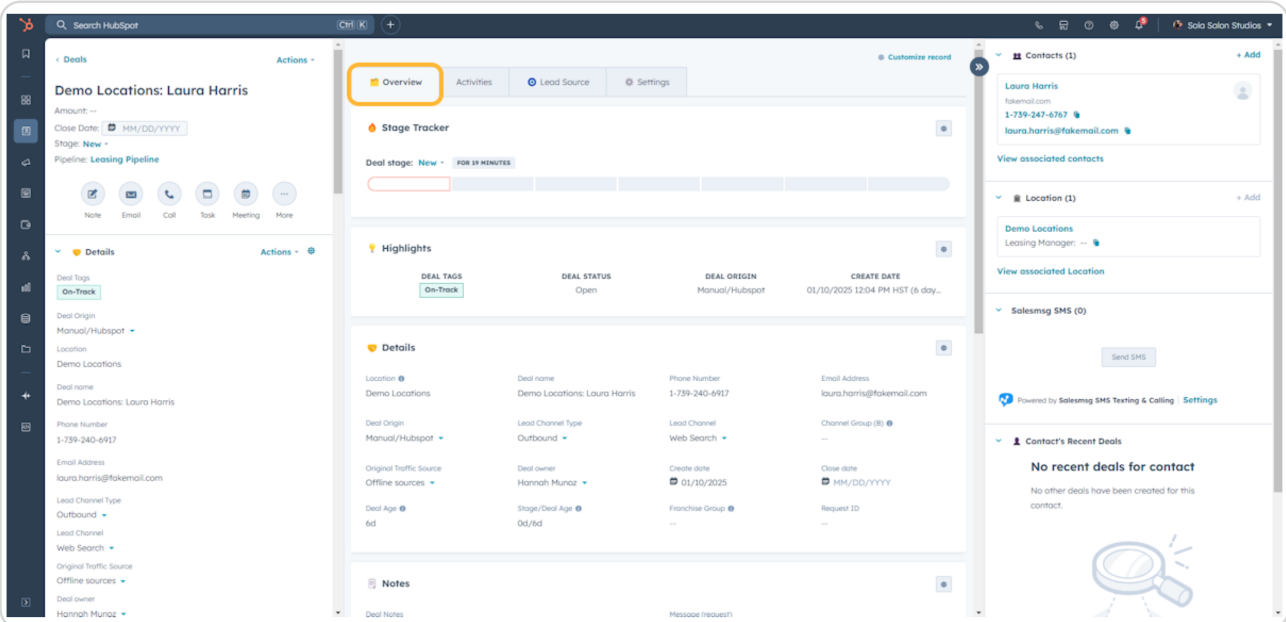
Click on Save



STEP 18

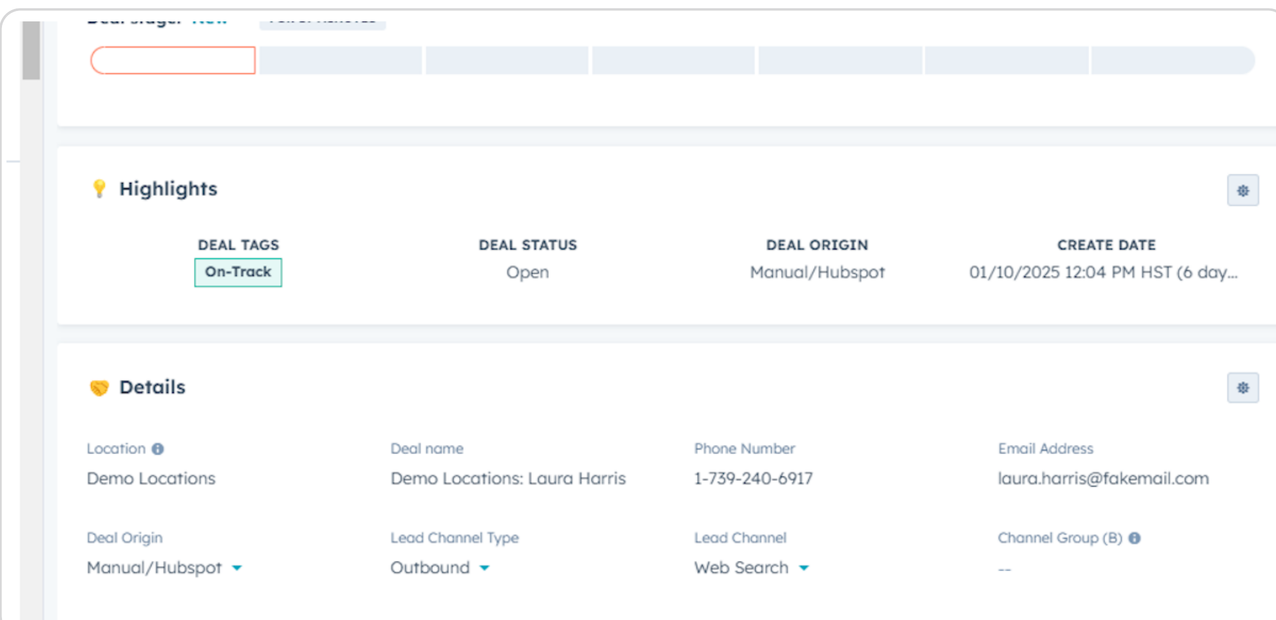
The center of the Deal Record holds the Overview and Activities tabs

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



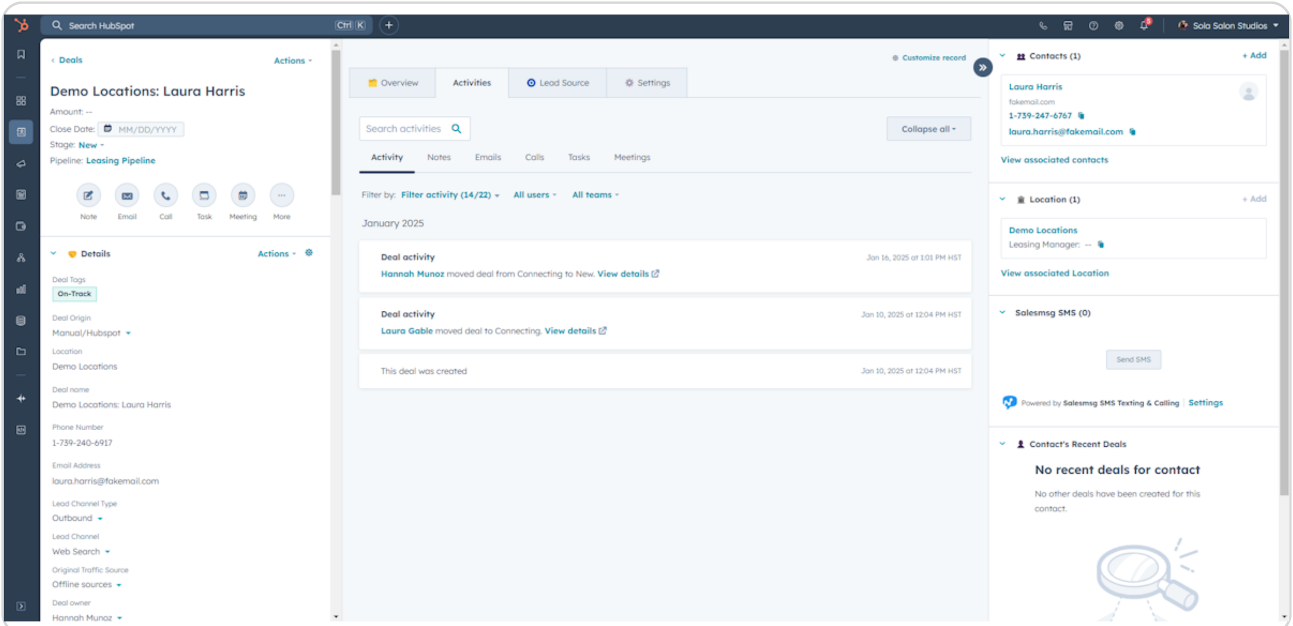
STEP 19

Click on Activities



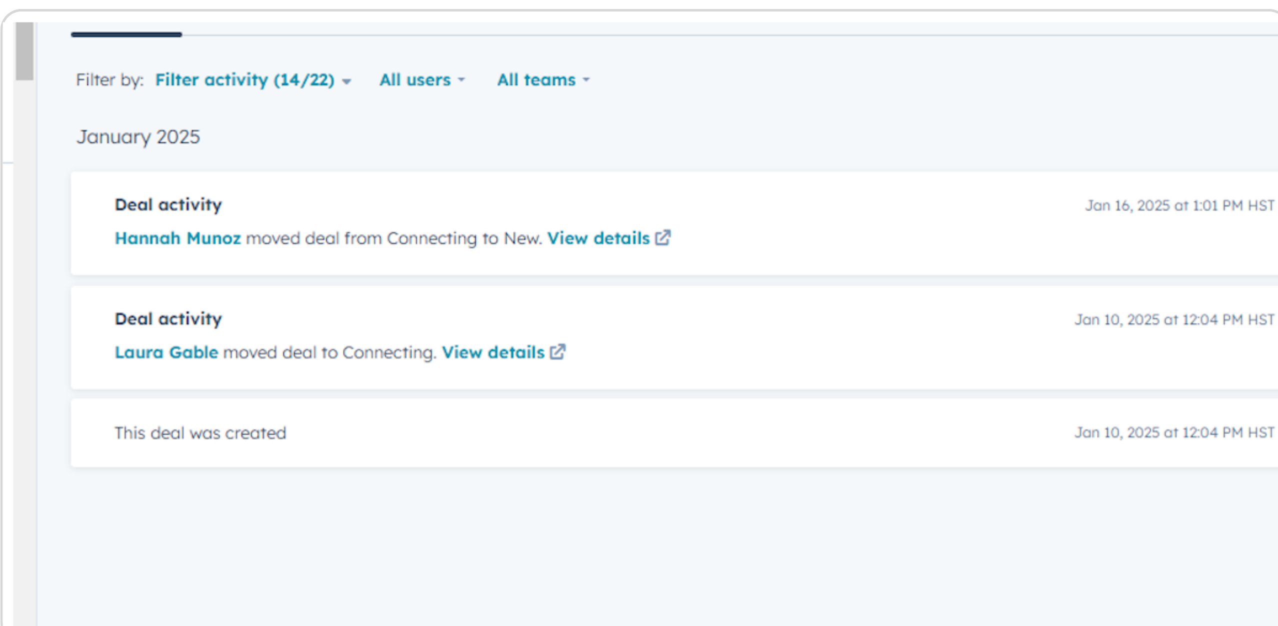
STEP 20

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



STEP 21

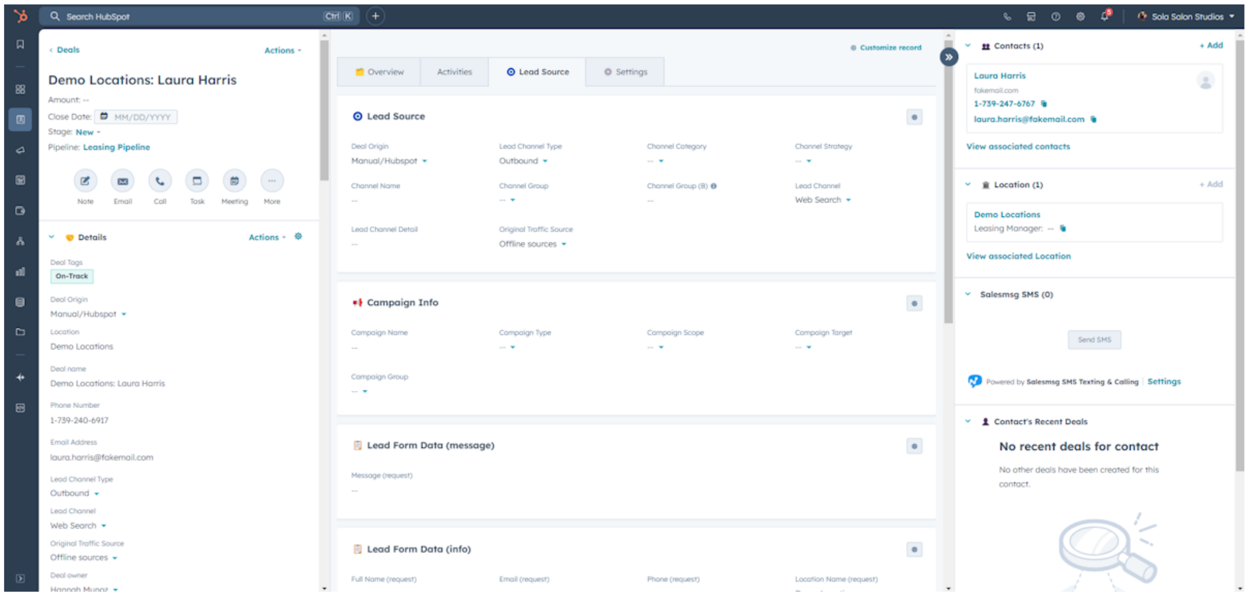
Click on Lead Source



STEP 22

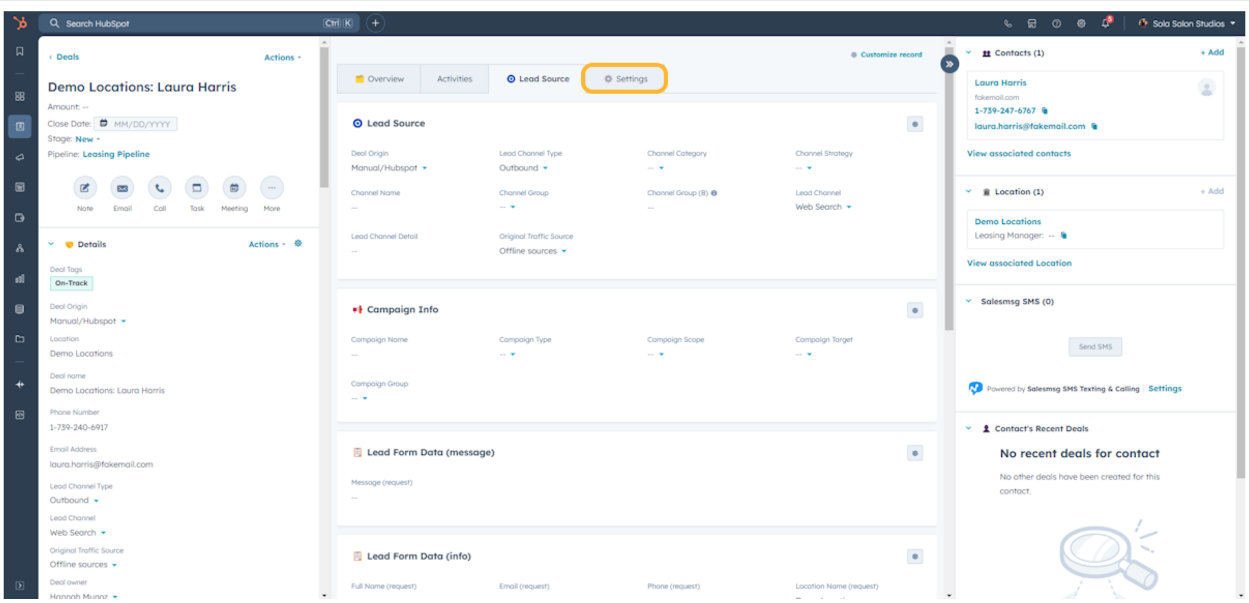
The Lead Source tab will give you a breakdown of where the Deal came from

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



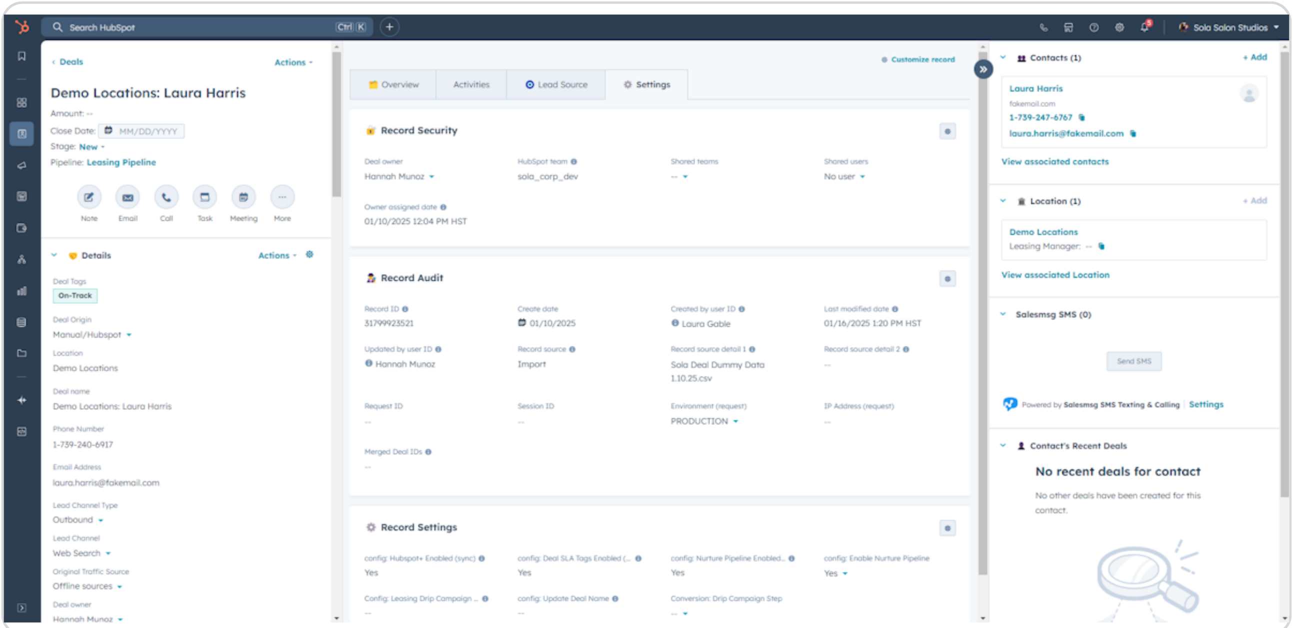
STEP 23

Click on Settings



STEP 24

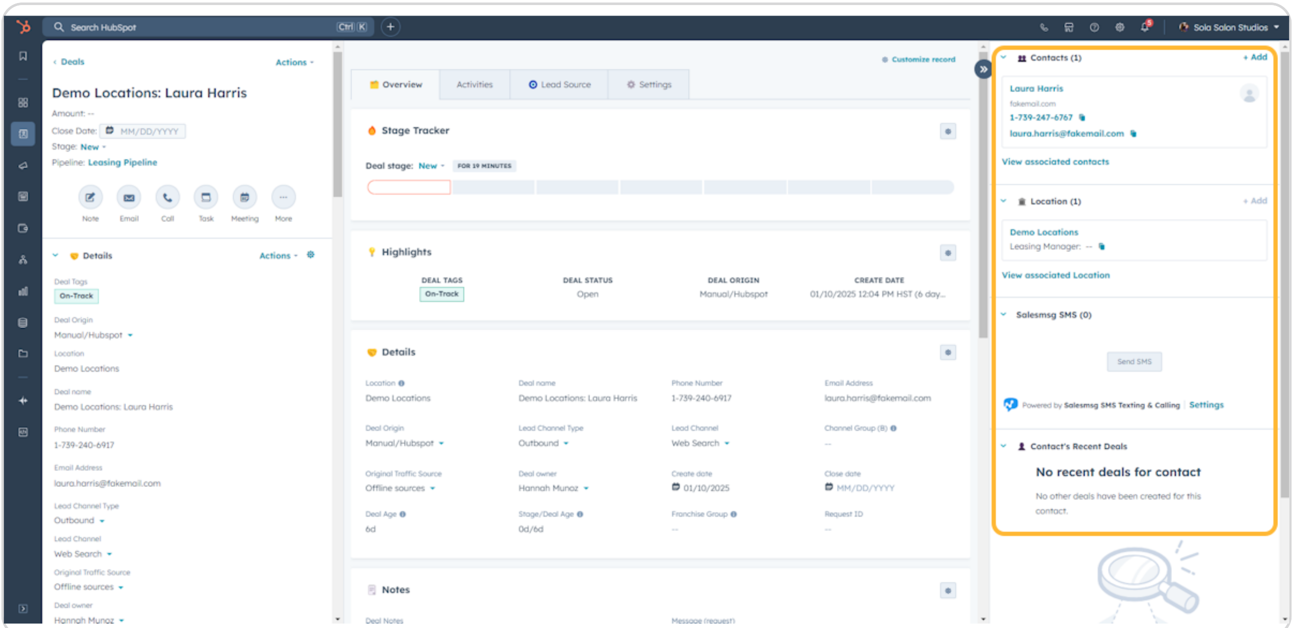
The Settings tab will show you information about the Deal Record Security, Record Audit, and Record Settings



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.

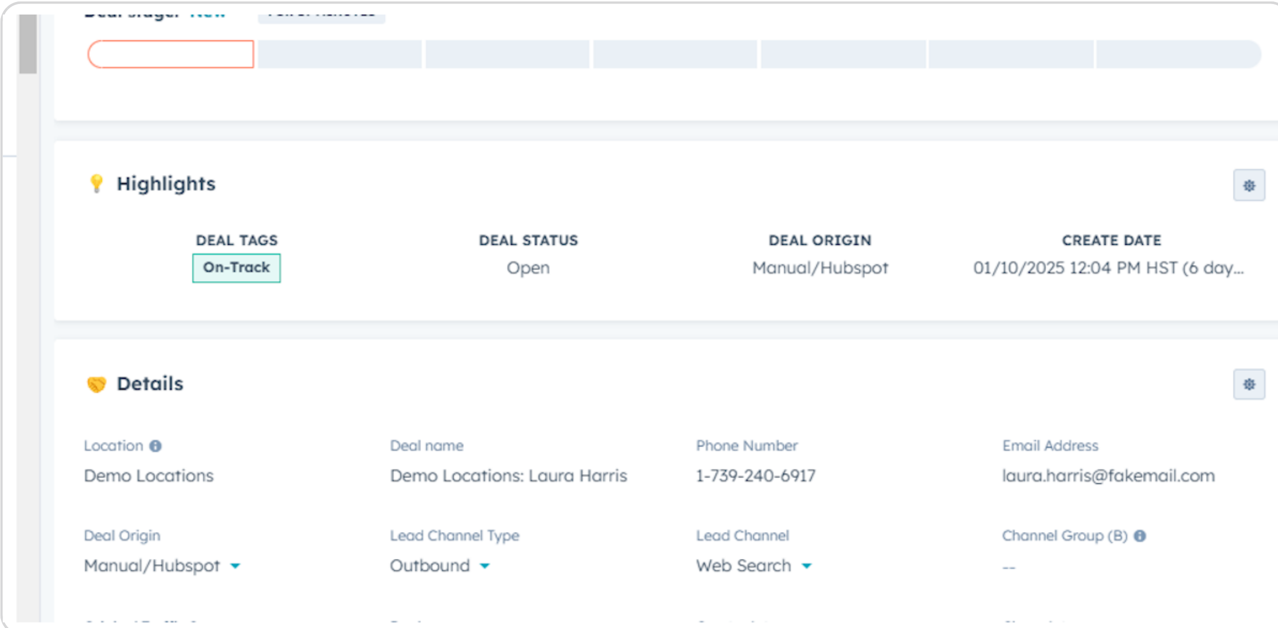


Creating a Deal

10 Steps

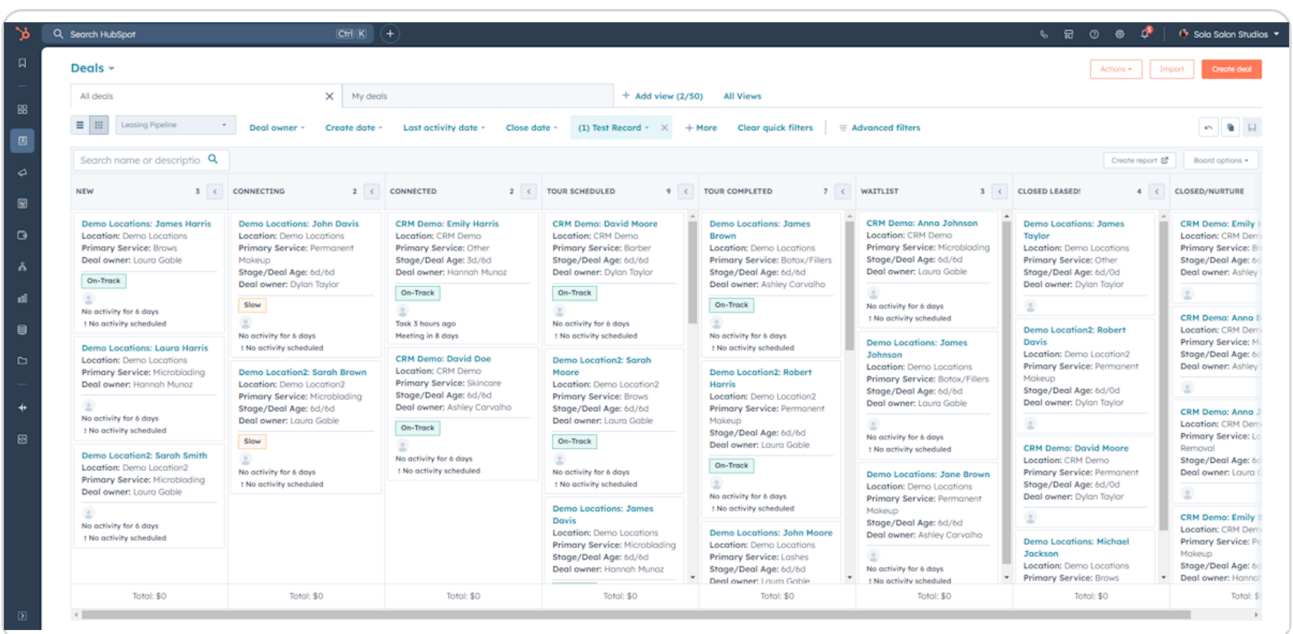
STEP 26

Click on Deals



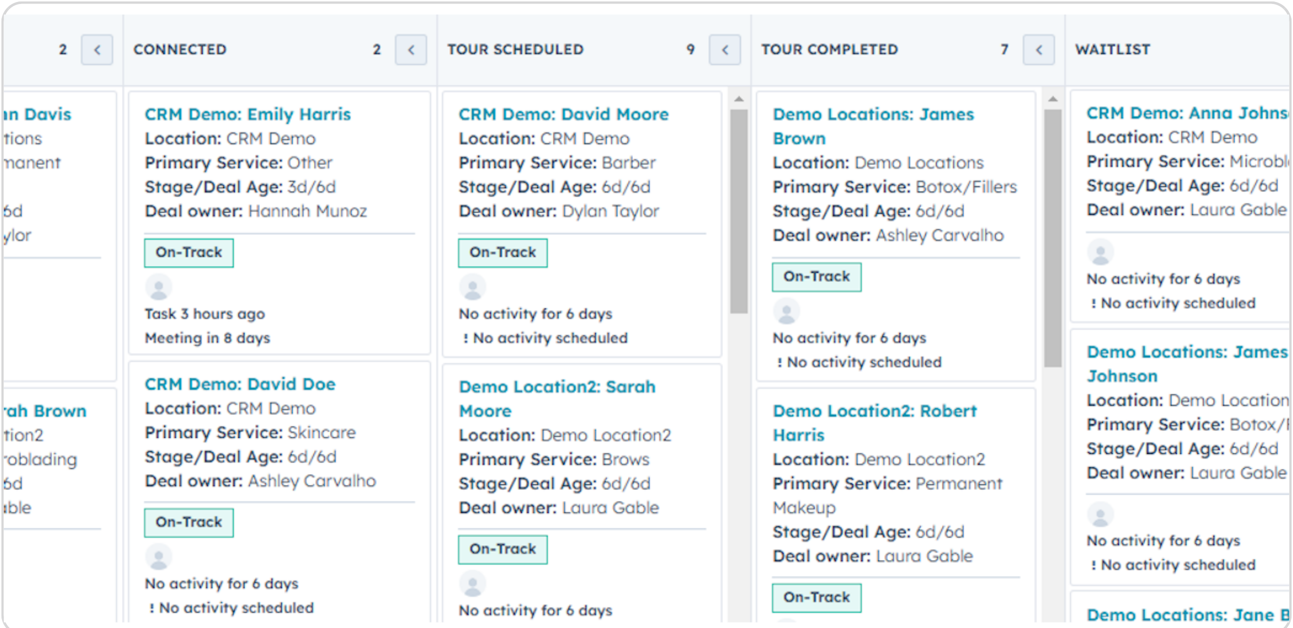
STEP 27

<u>You'll be back in the Deal overview</u>



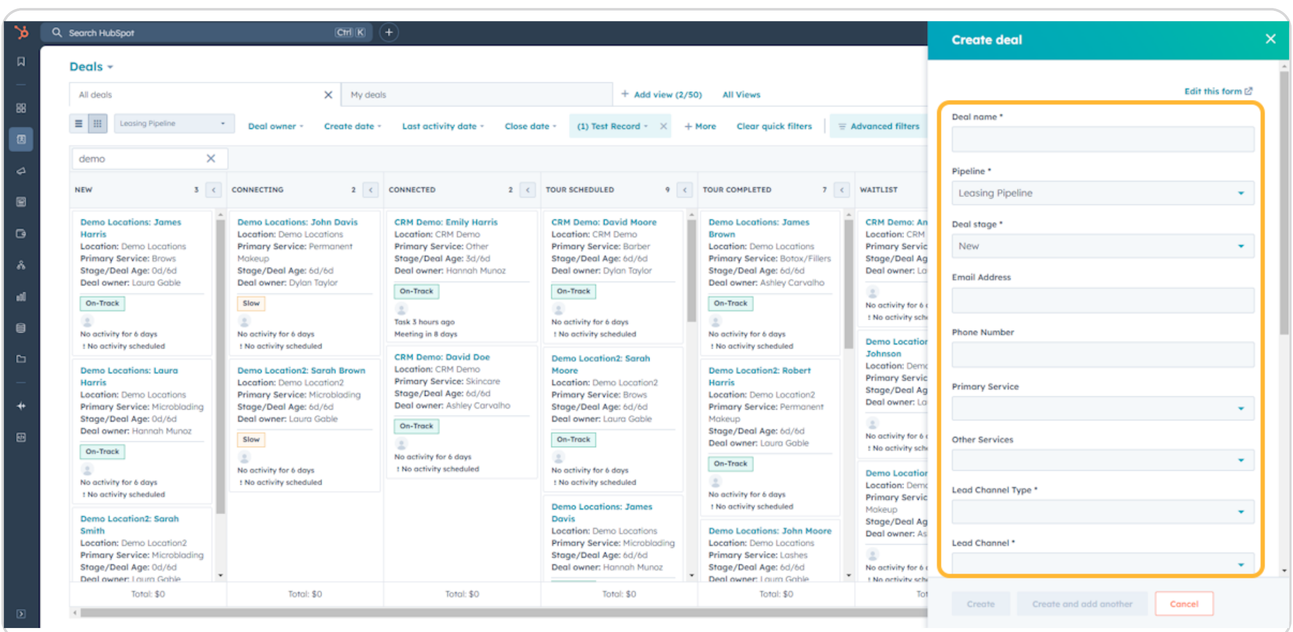
STEP 28

Click on Create deal



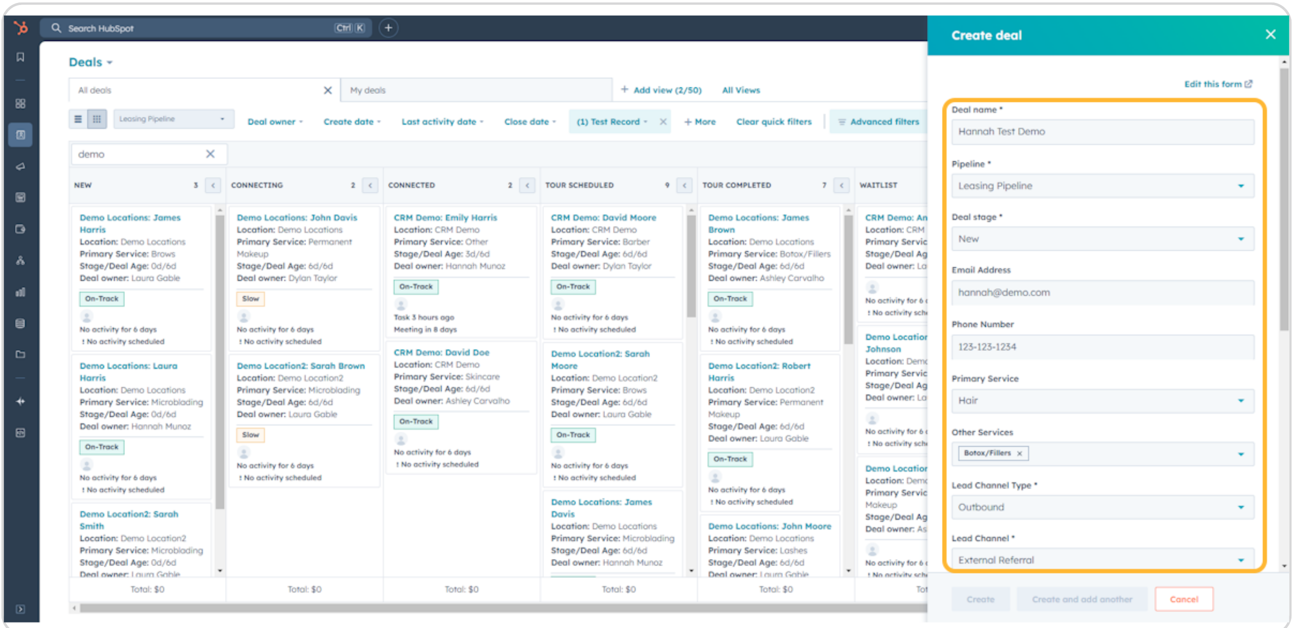
STEP 29

A form will appear for you to fill out



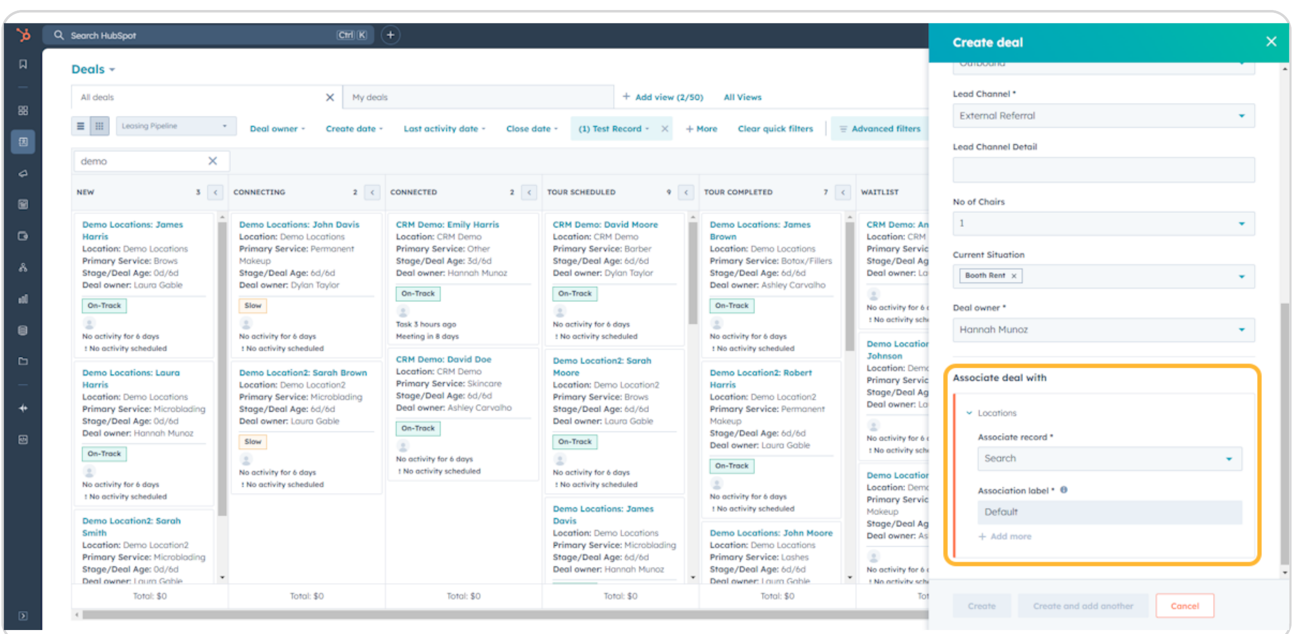
STEP 30

Fill out the form with the appropriate information



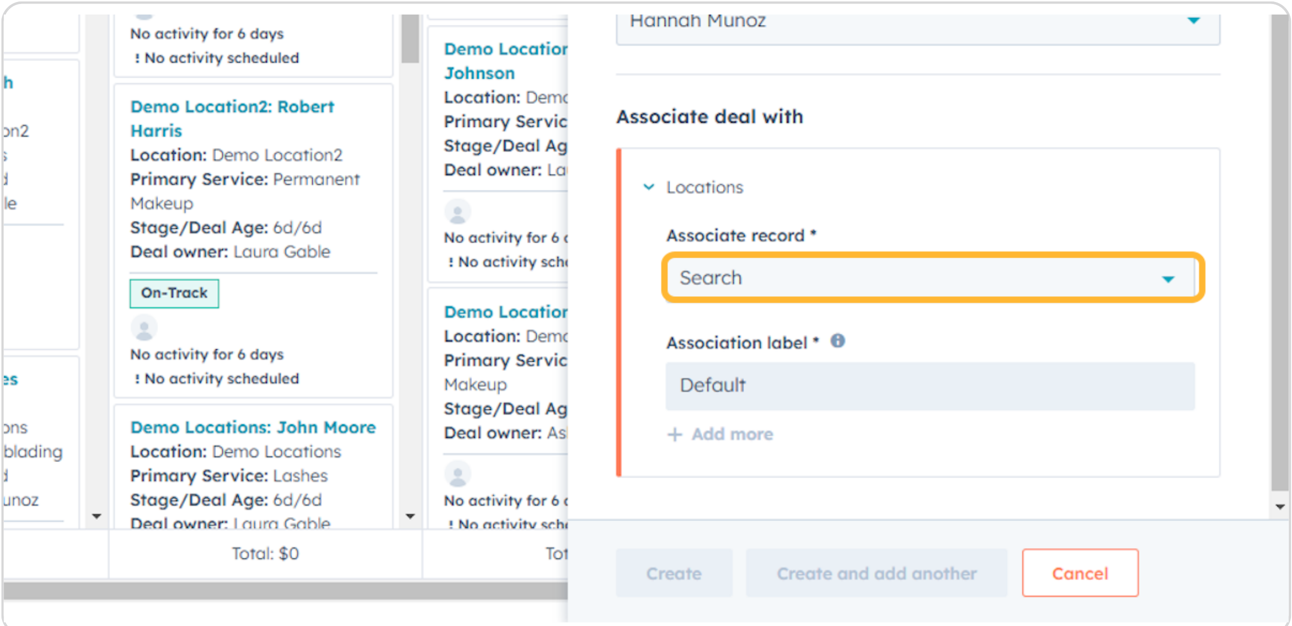
STEP 31

At the bottom of the form is a Location drop down



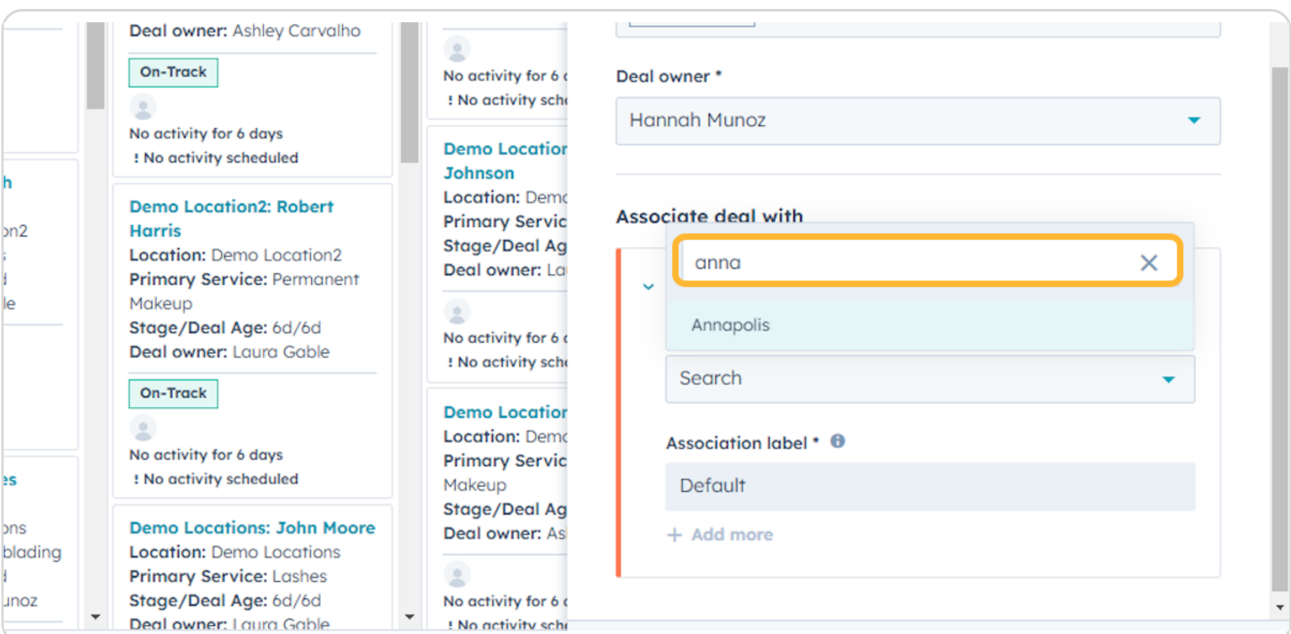
STEP 32

Click on the Search dropdown



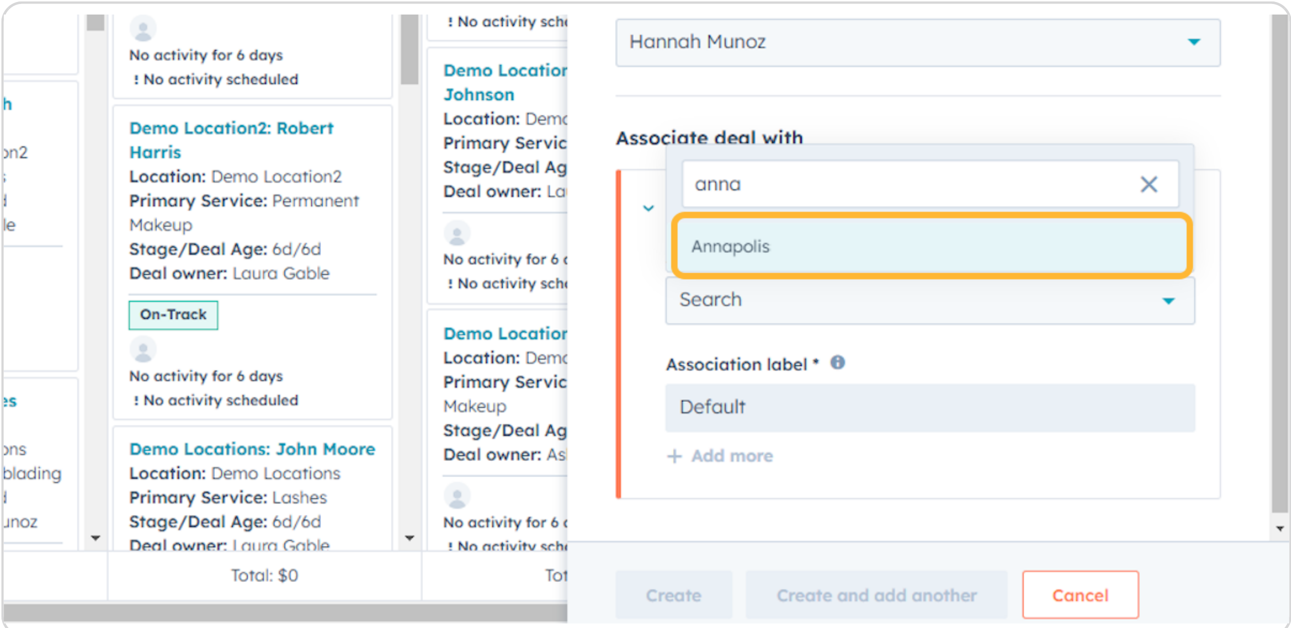
STEP 33

Search for the Location



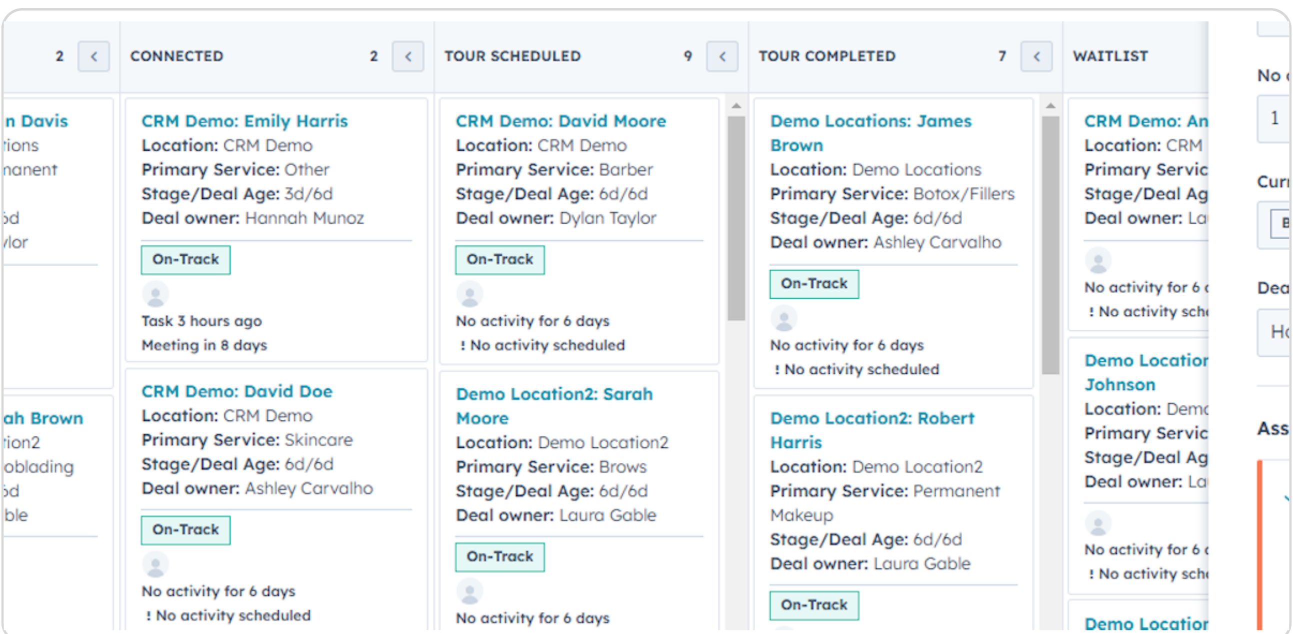
STEP 34

Choose the Location you need



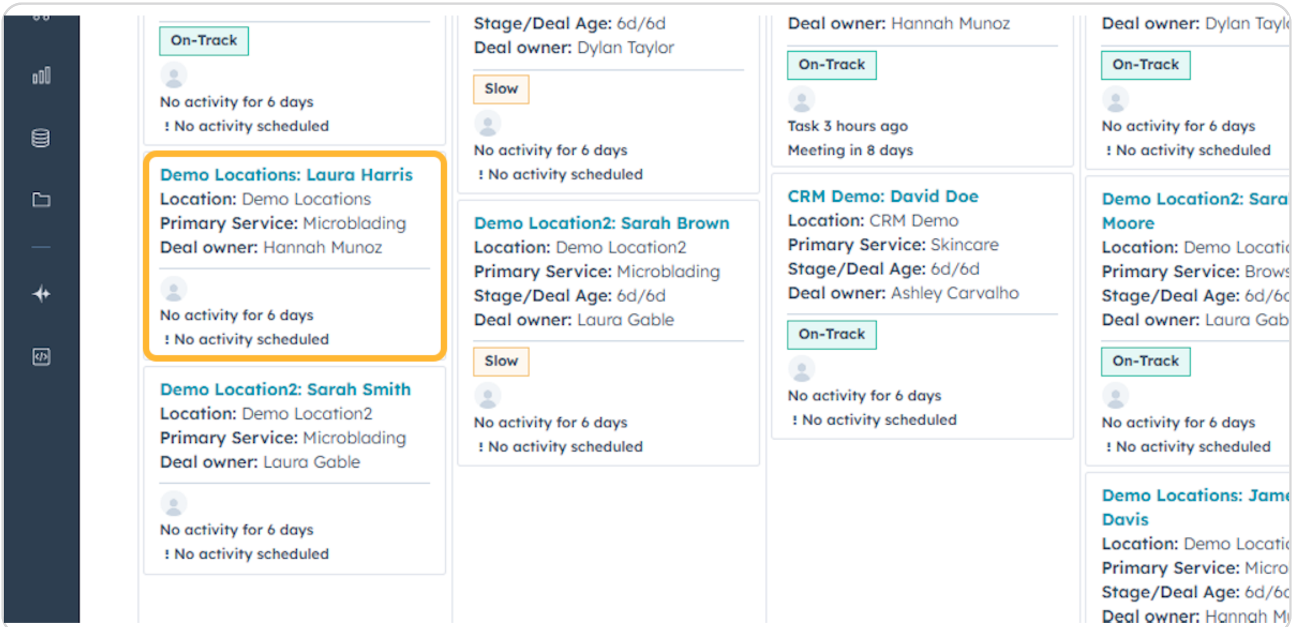
STEP 35

Click on Create



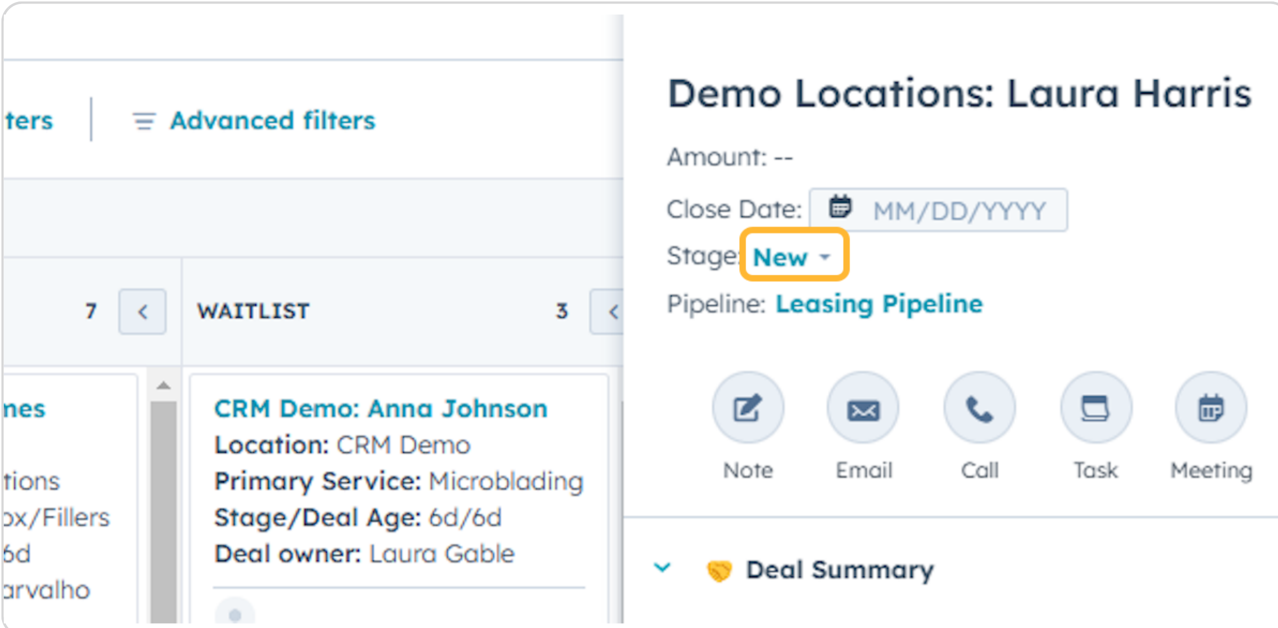
STEP 36

To update a Deal stage, Click on a Deal Card



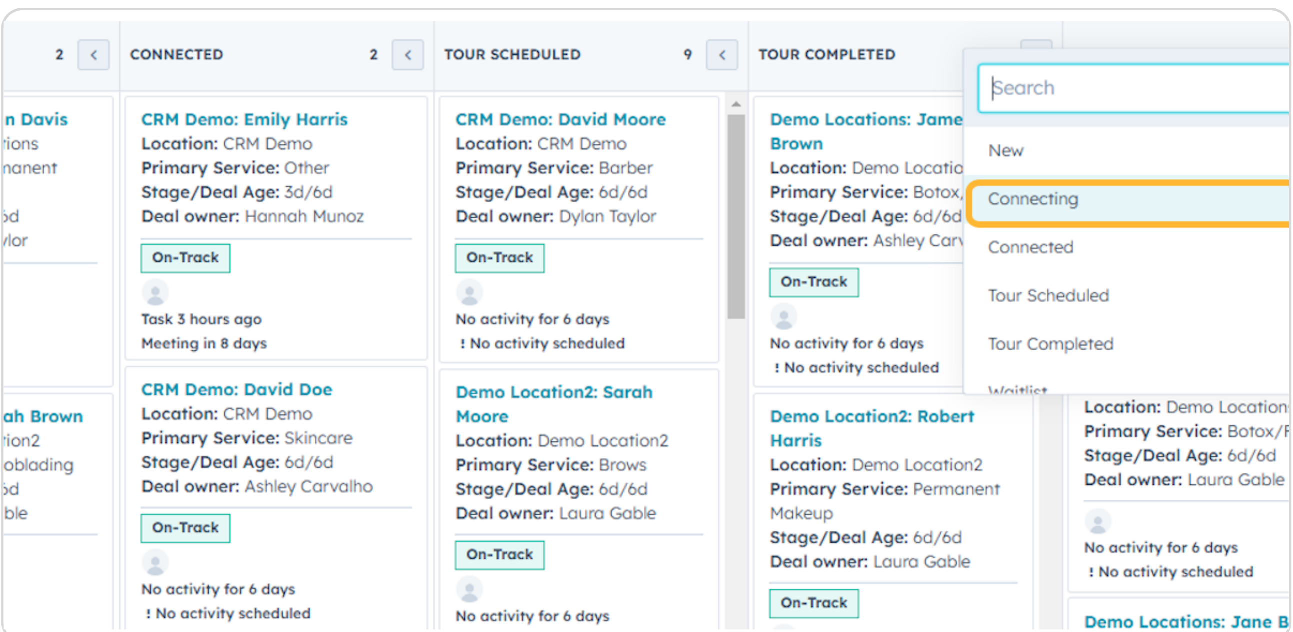
STEP 37

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



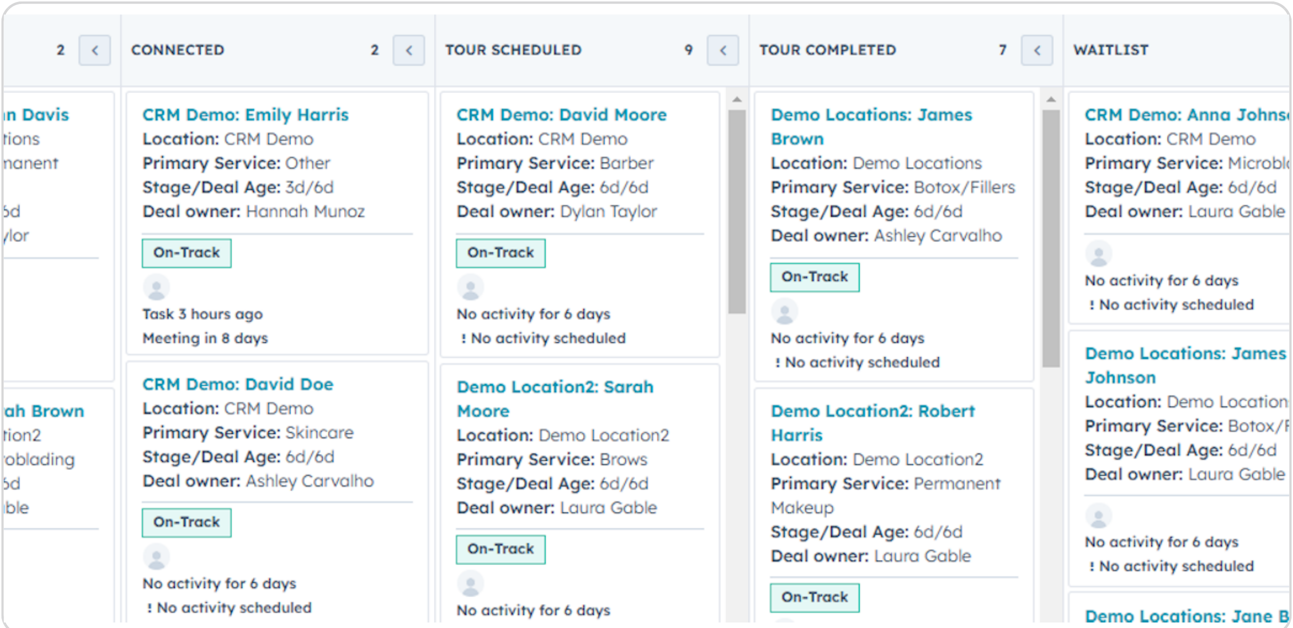
STEP 38

Select the stage the Deal should be in



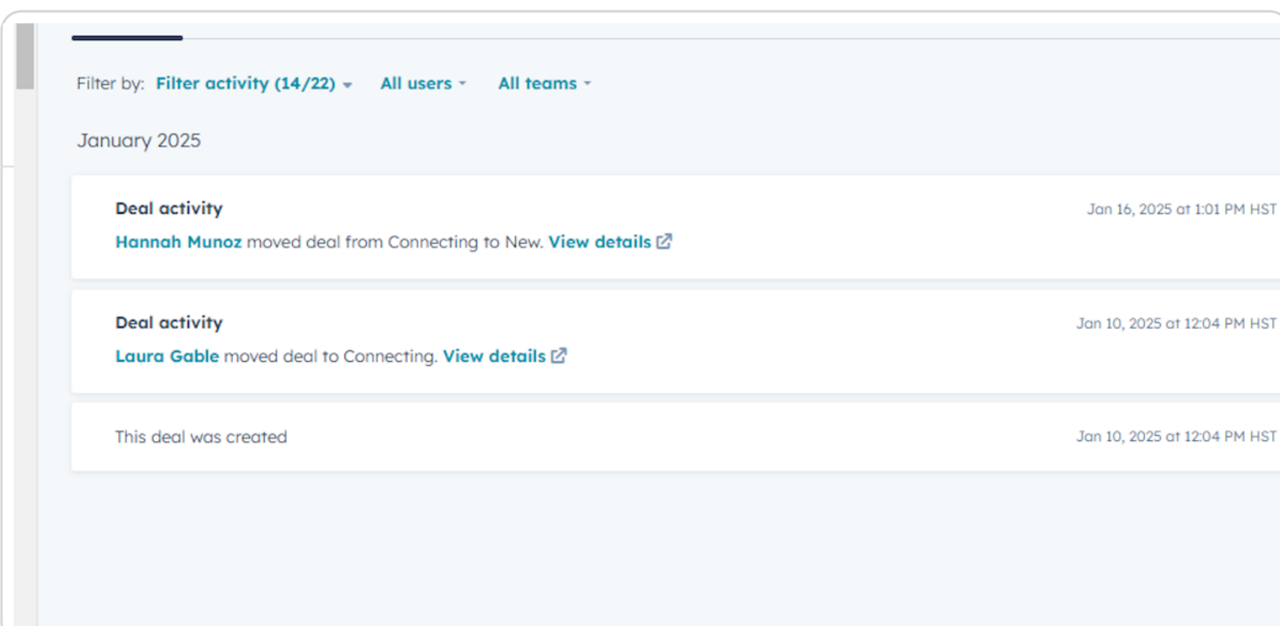
STEP 39

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



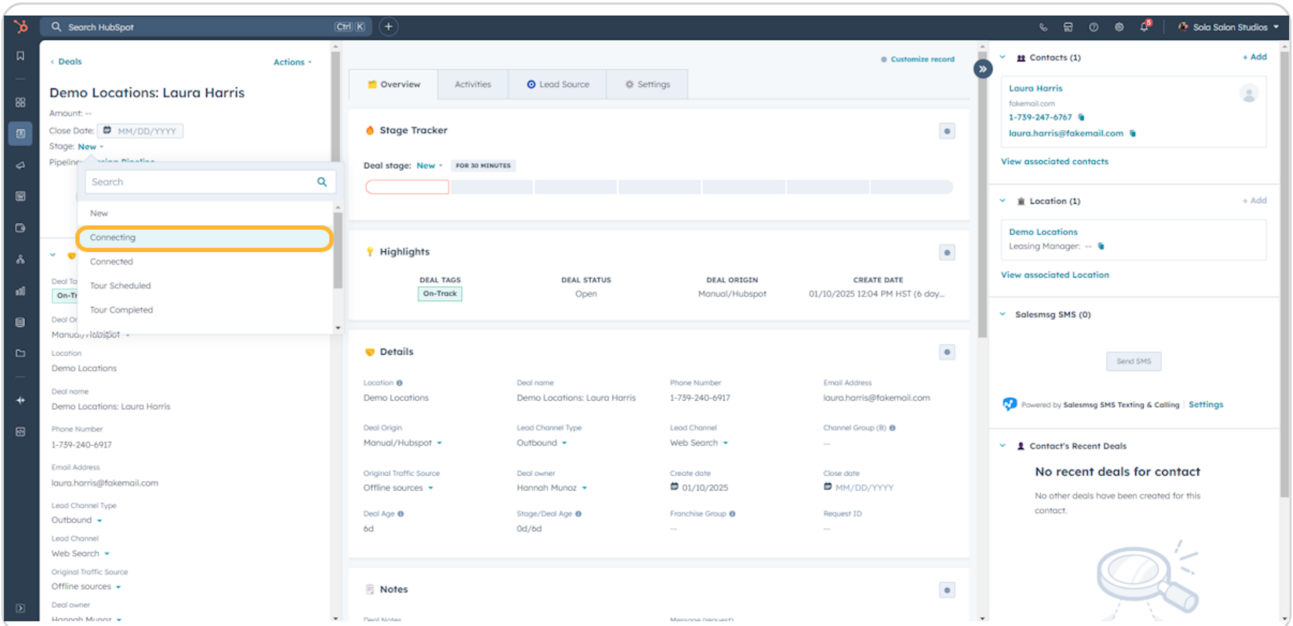
STEP 40

Click on the Stage dropdown in the Deal Record



STEP 41

Update the Stage



STEP 42

Congratulations! You've finished the Deal Record Overview

LIFT Enablement