Sola Salon Studios - Logging Activity - Quick Action Buttons for Leaving Notes, Creating Tasks and More

In any HubSpot record, there are buttons at the top of both the top of the preview of a record and the record itself. These buttons are used for outreach and making sure actions are logged to HubSpot. This guide will walk through the action buttons including:

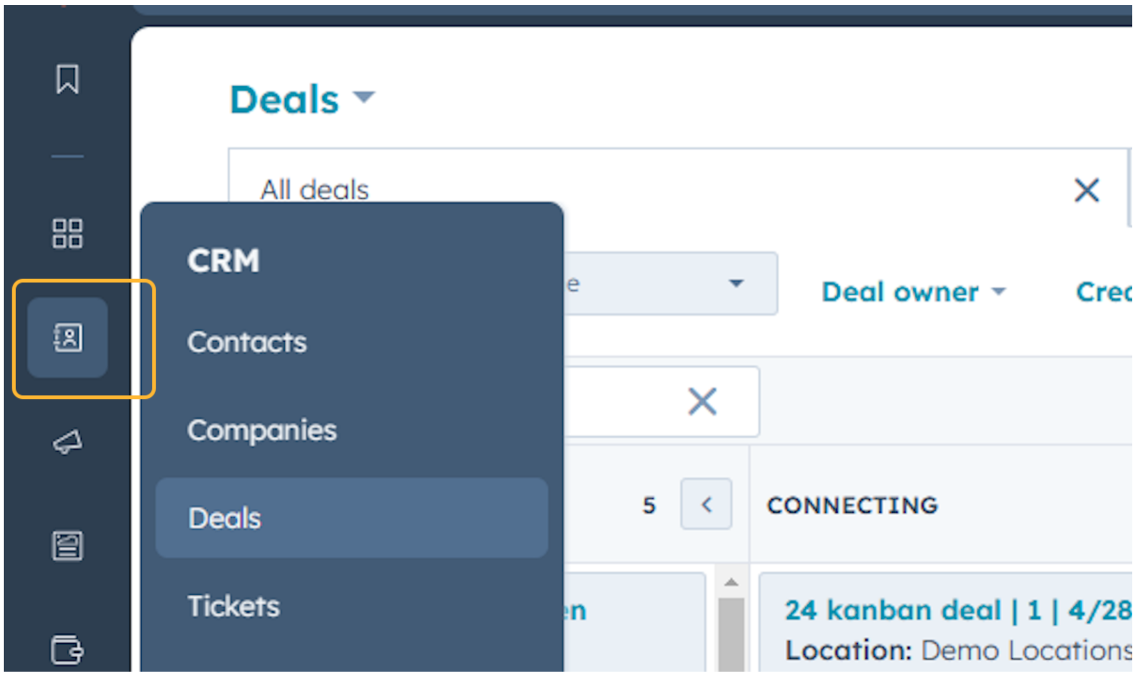
- Creating notes
- Creating tasks
- Scheduling a meeting

43 Steps   [View most recent version](#)

Created by	Creation Date	Last Updated
Doug Davidoff	Dec 04, 2024	Jan 17, 2025

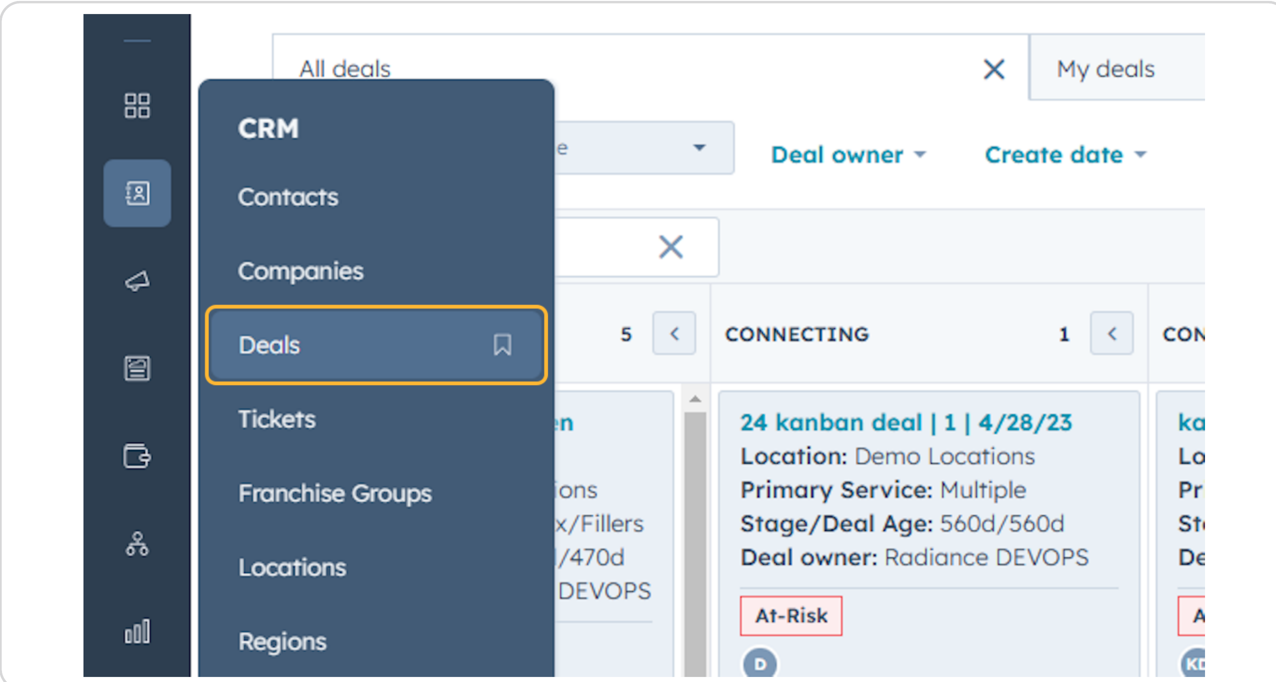
STEP 1

Navigate to the left-hand side and go to the CRM menu item



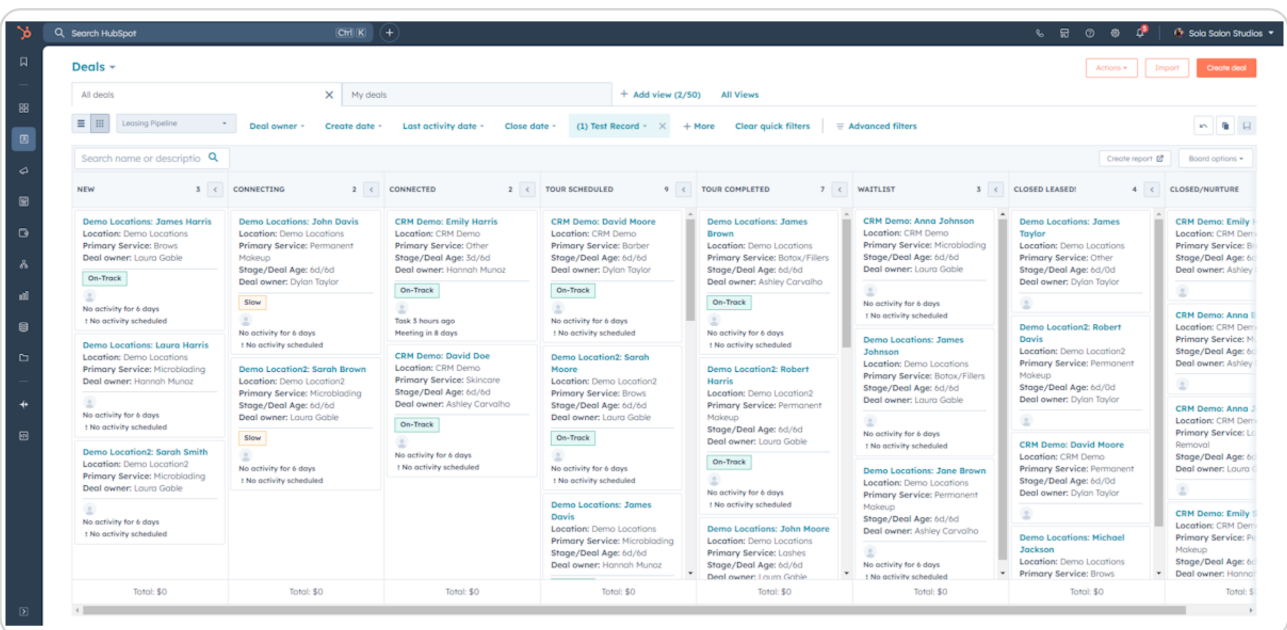
STEP 2

Click on Deals



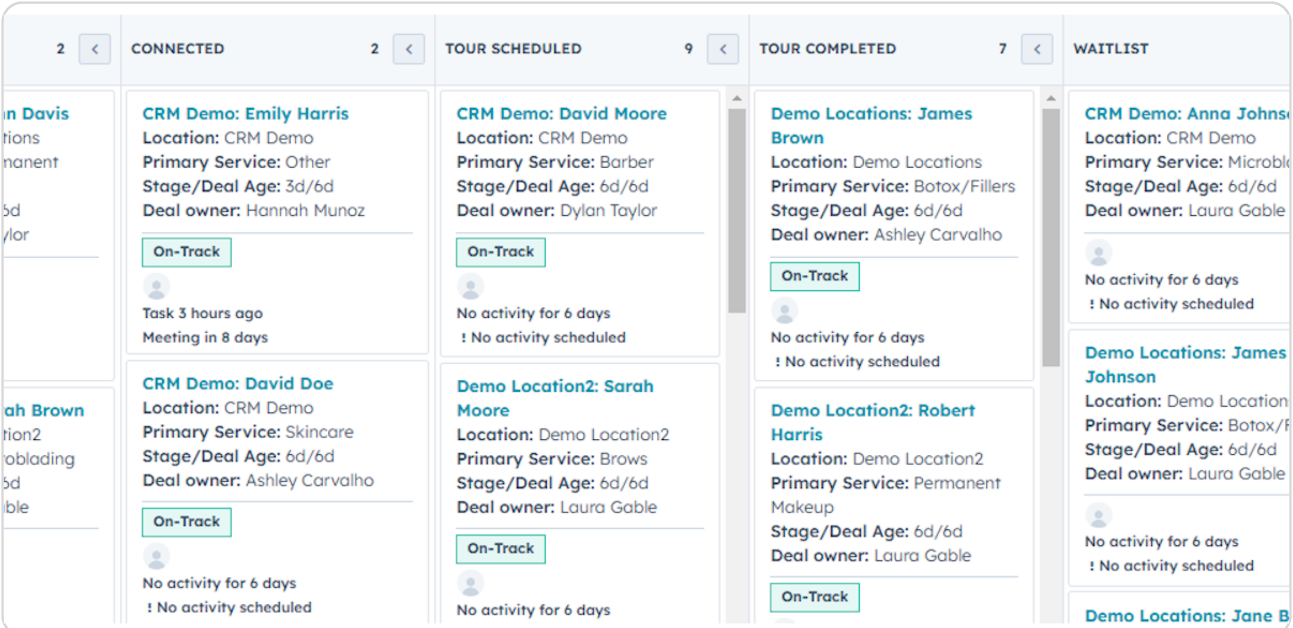
STEP 3

This will take you to the Deal overview



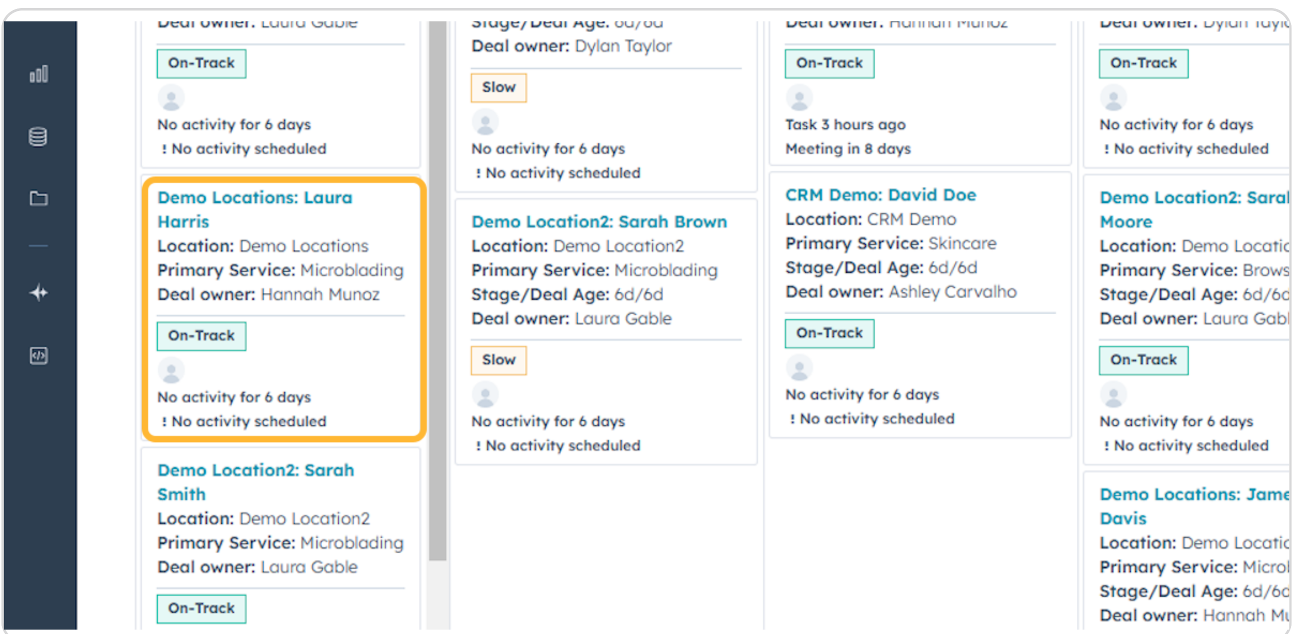
STEP 4

Search for a Deal



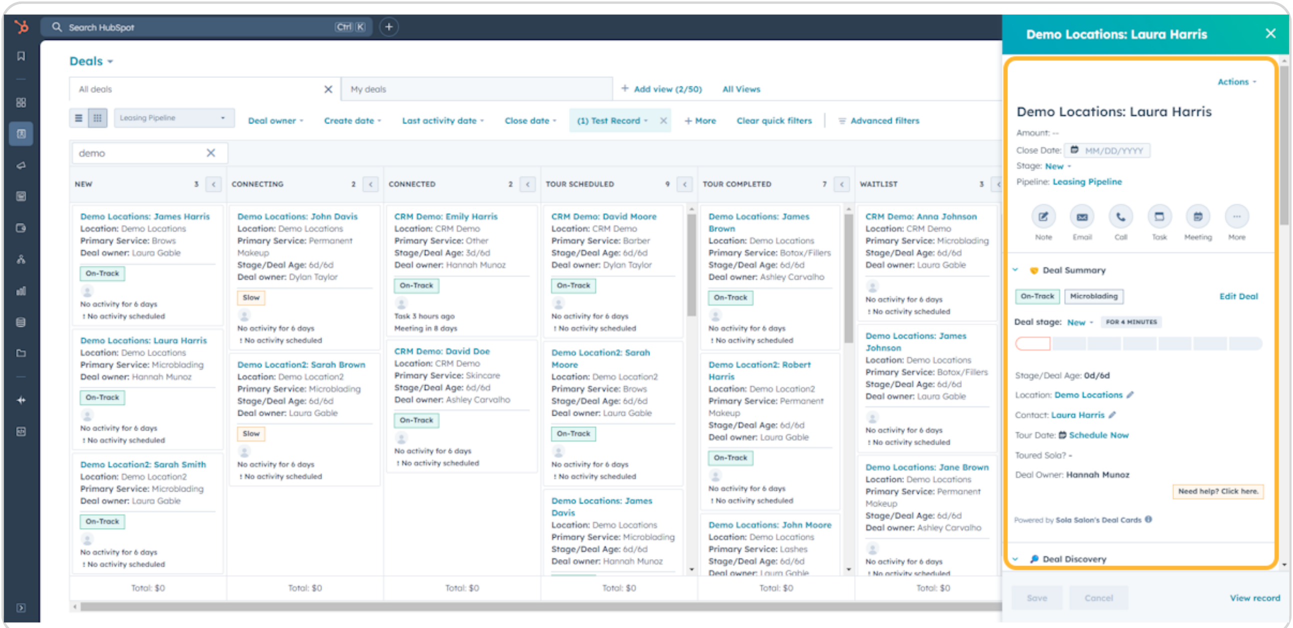
STEP 5

Click on the Deal Card



STEP 6

A Deal Card Preview will appear. At the top of this card there will be a string of buttons where you can create a note, create a task, and create a meeting.



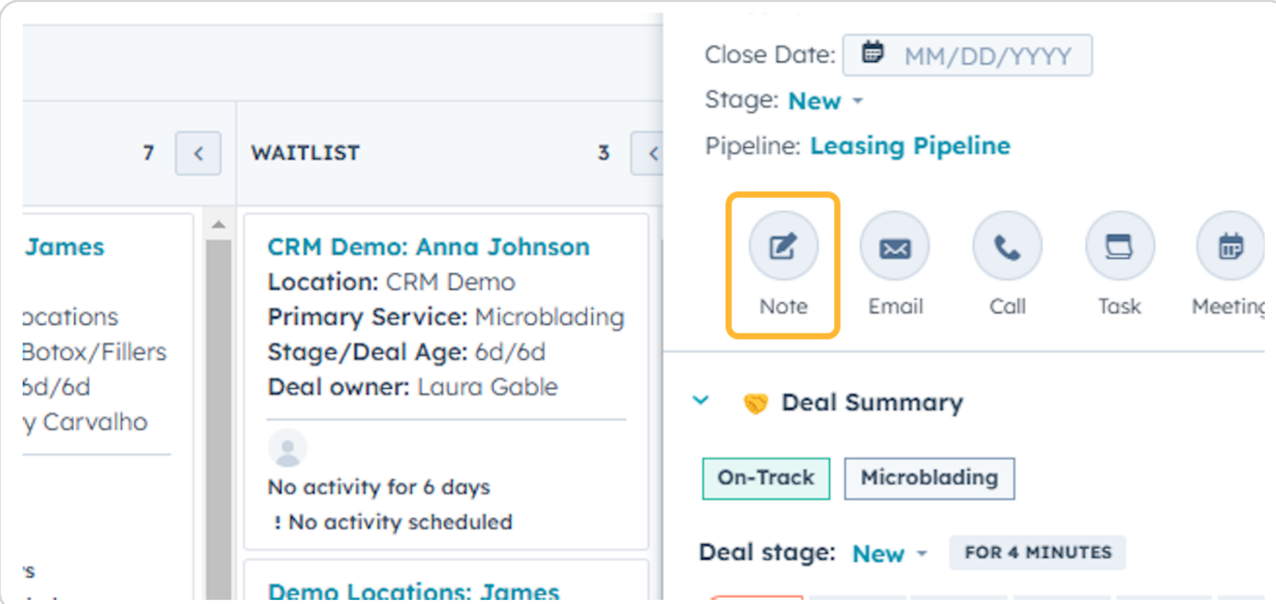
Creating a Note

5 Steps

Creating notes are great for logging important information or context to a specific record

STEP 7

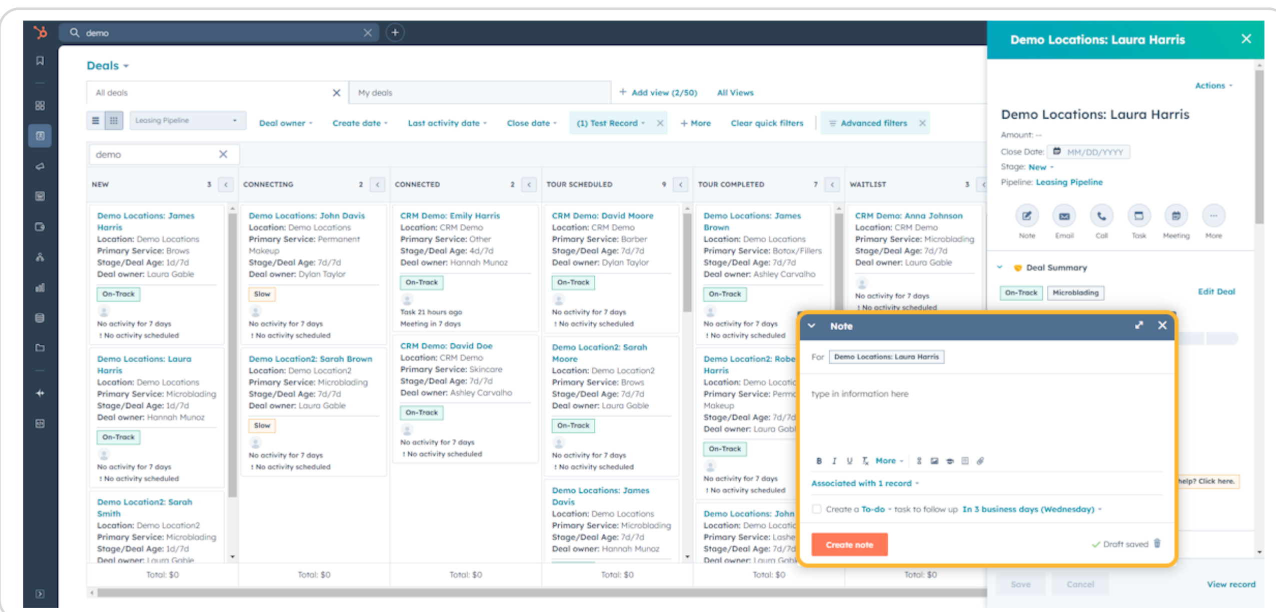
Click on Create a note



STEP 8

Type information into the body of the note

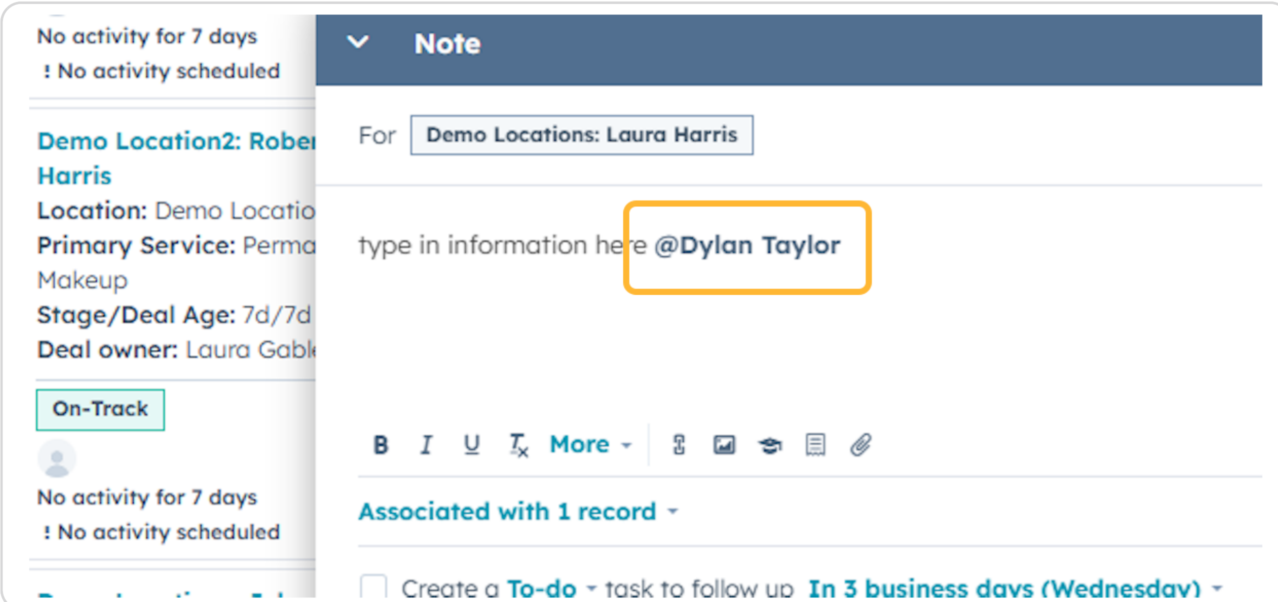
Note: You can style the text in the note and add any files, links, images, etc. that are relevant/necessary to include.



STEP 9

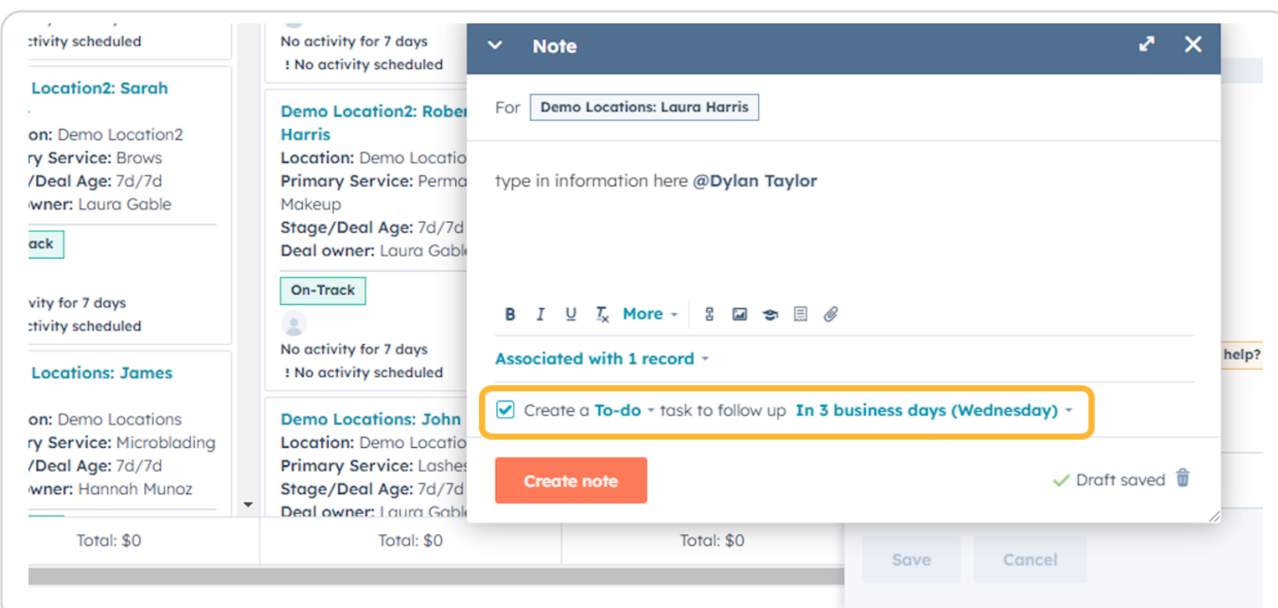
Use the @ to mention someone in the note

Note: If you @ mention someone on a note HubSpot will notify them of the mention.



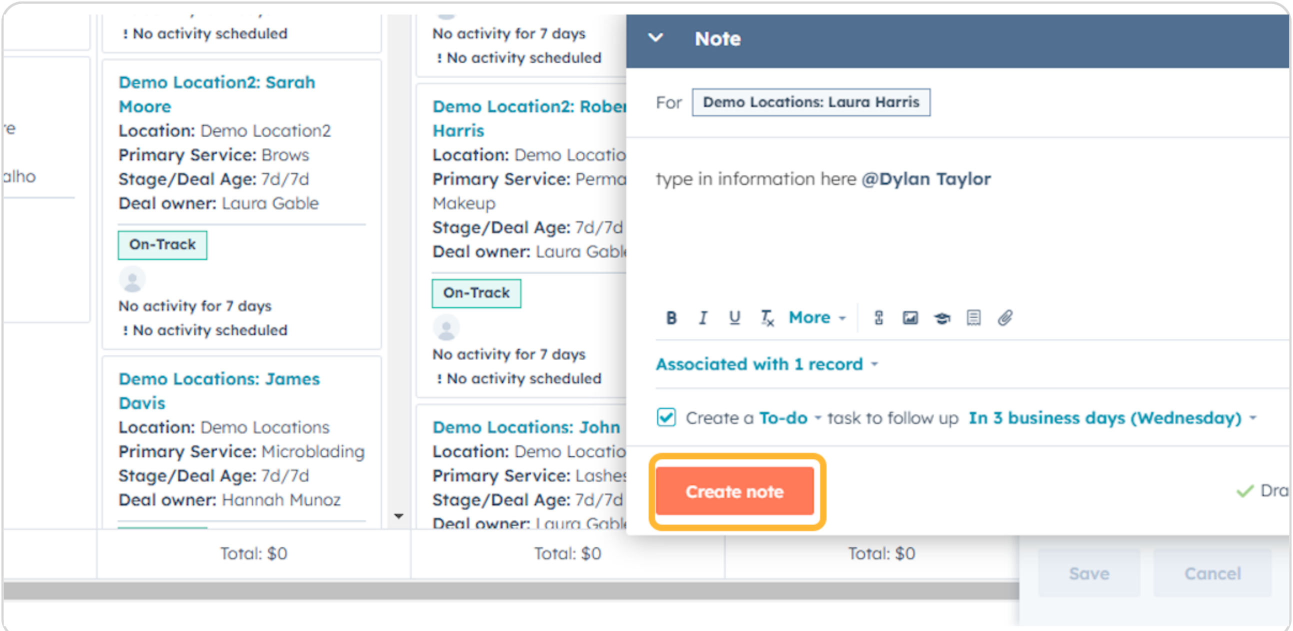
STEP 10

If you want to create a follow up task for this note, you can check to create a task and update when the task will be due



STEP 11

Click on Create note



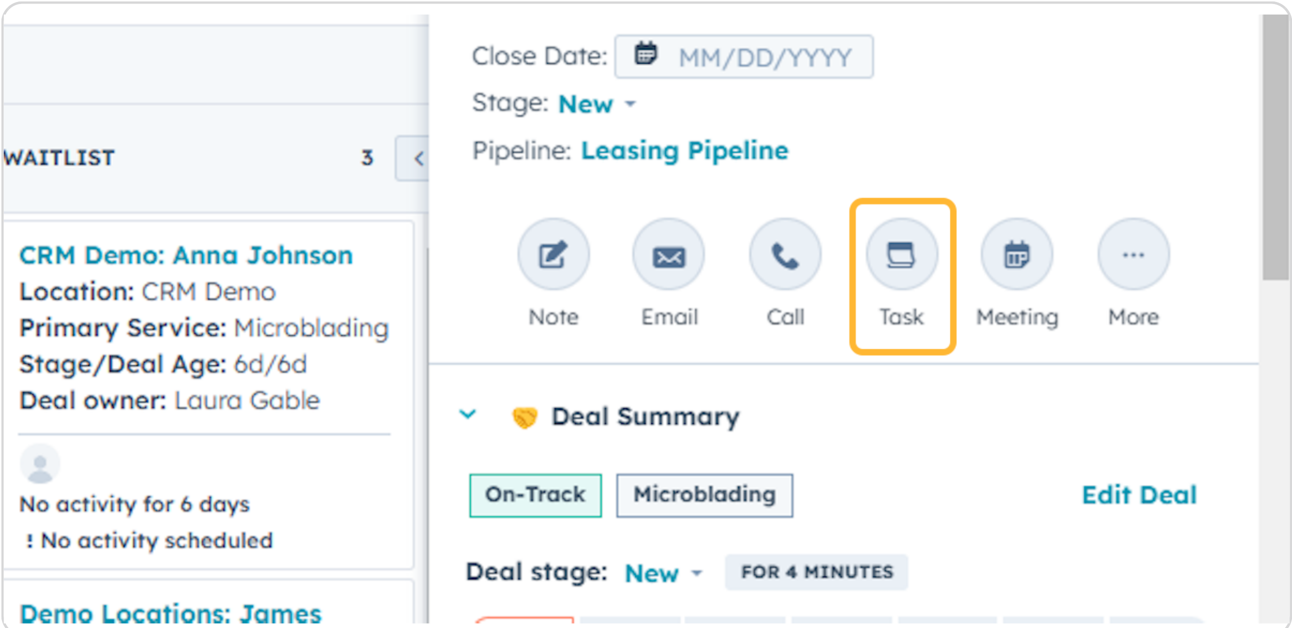
Creating a Task

6 Steps

Tasks are great to help keep track of specific actions you need to take next on a record, whether that's following up with the Pro or doing something related to the record.

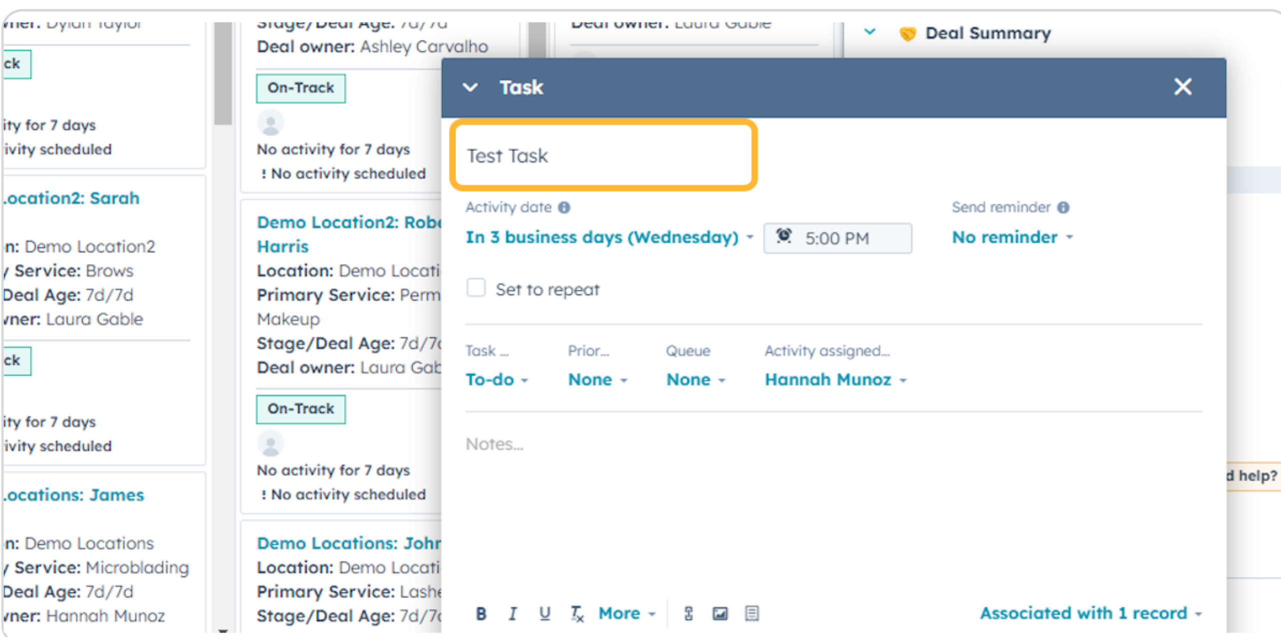
STEP 12

Click on Create a task



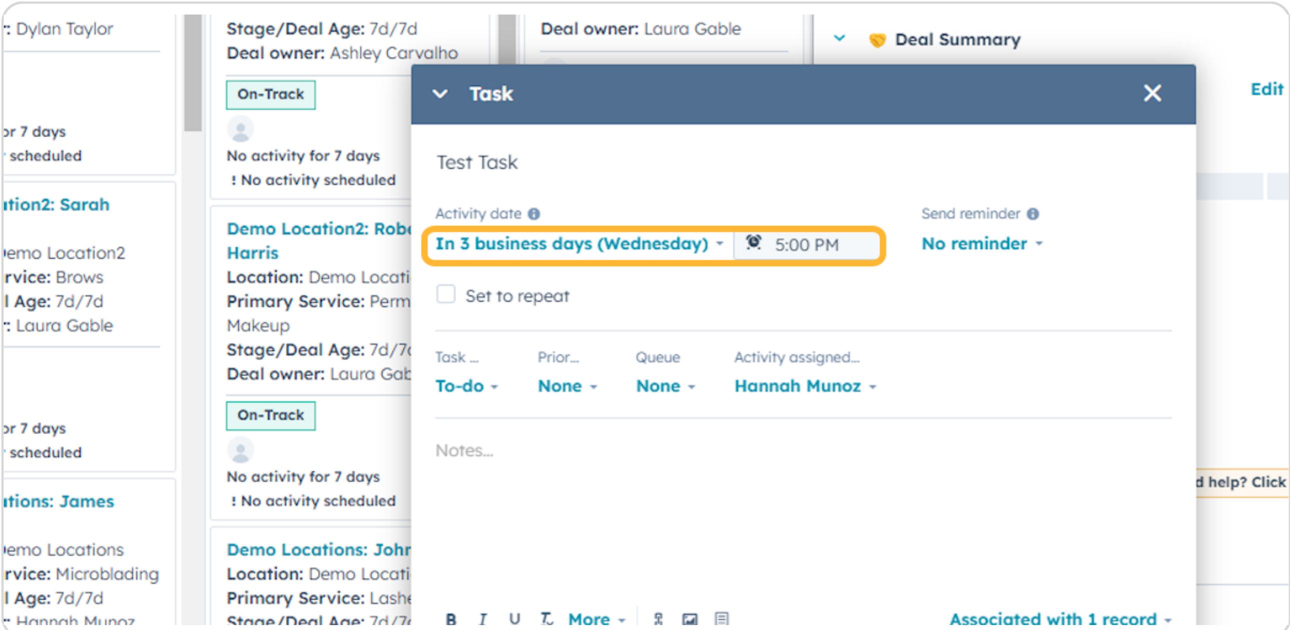
STEP 13

Type in the name of your task



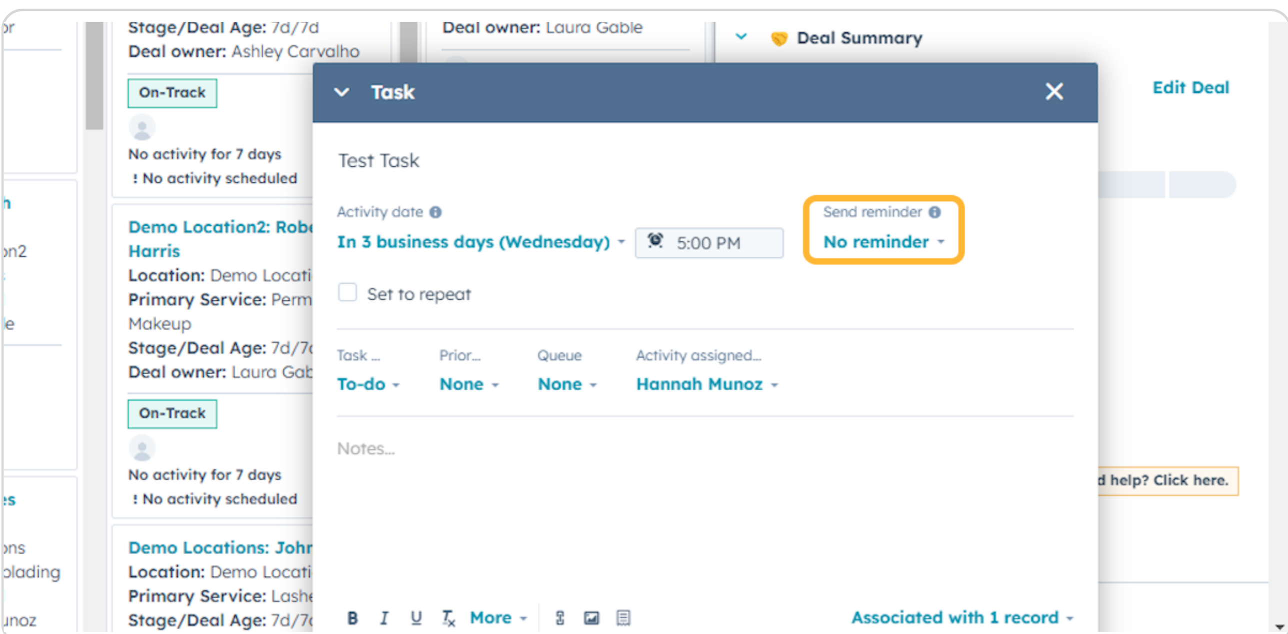
STEP 14

Update the Activity date and time



STEP 15

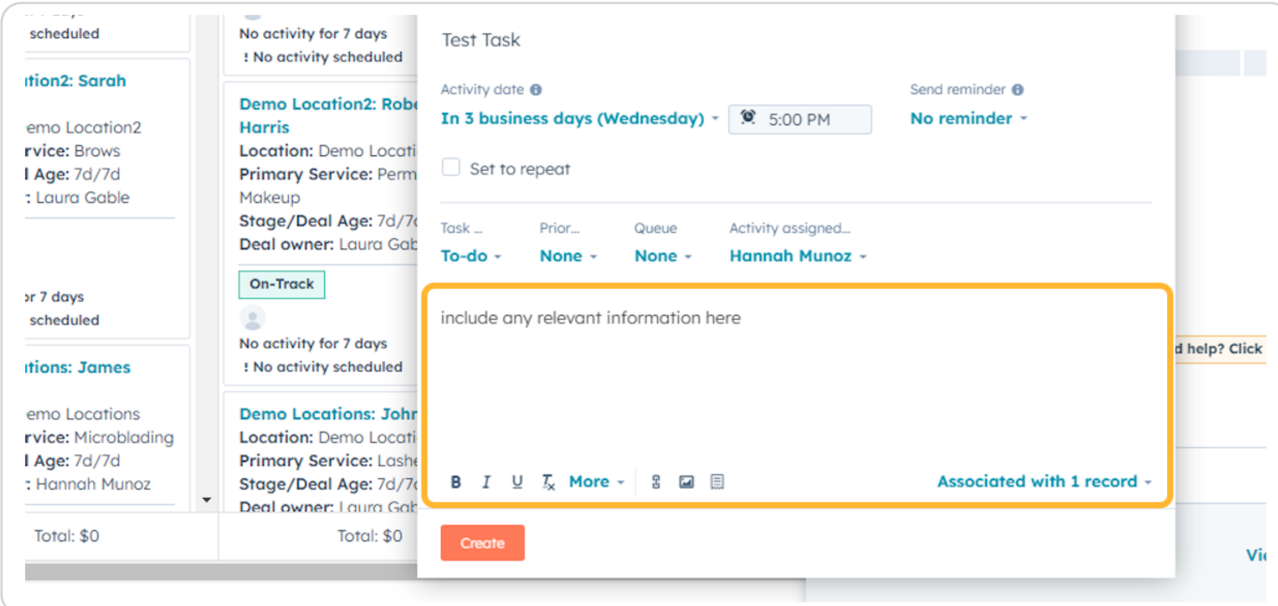
If you would like to be reminded of the task, update the Send reminder



STEP 16

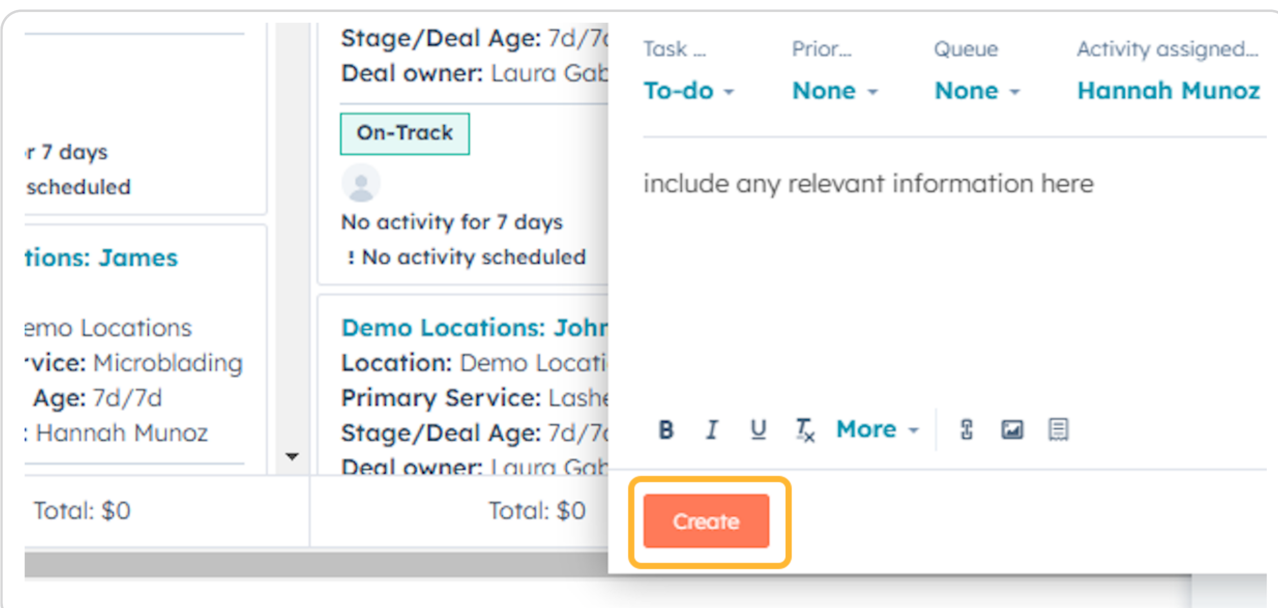
Include a Task Description

Include any context you'll need to complete the task. You can format the text and include links, images, and other documents needed.



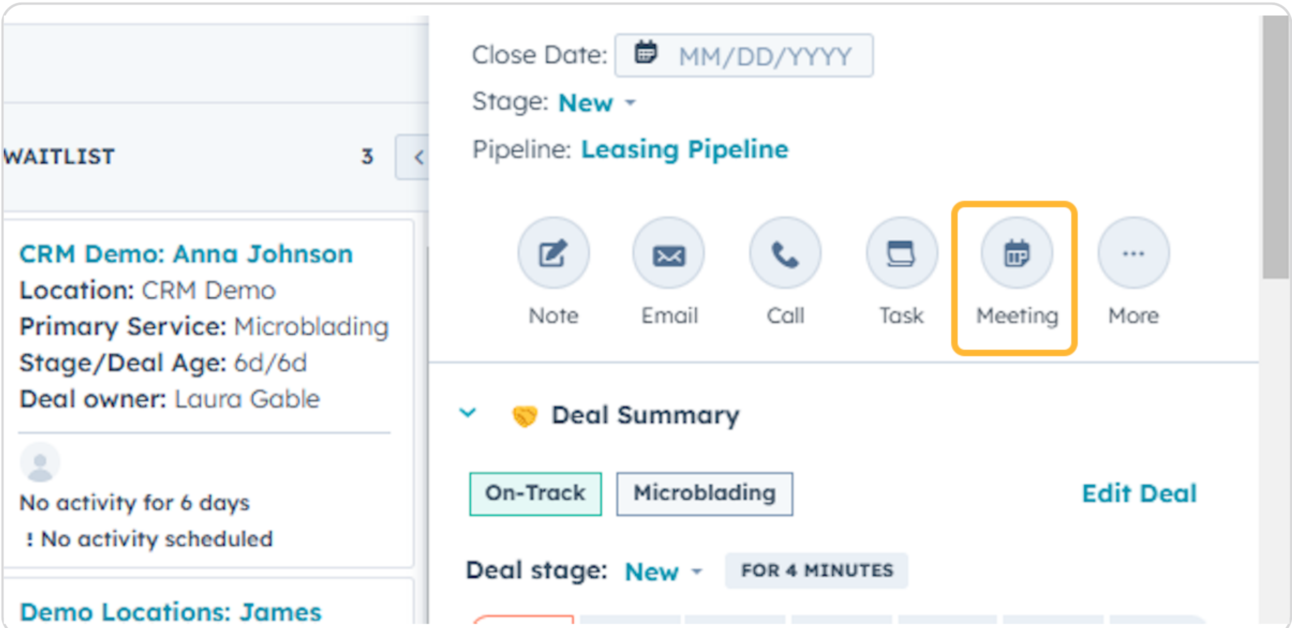
STEP 17

Click on Create



STEP 18

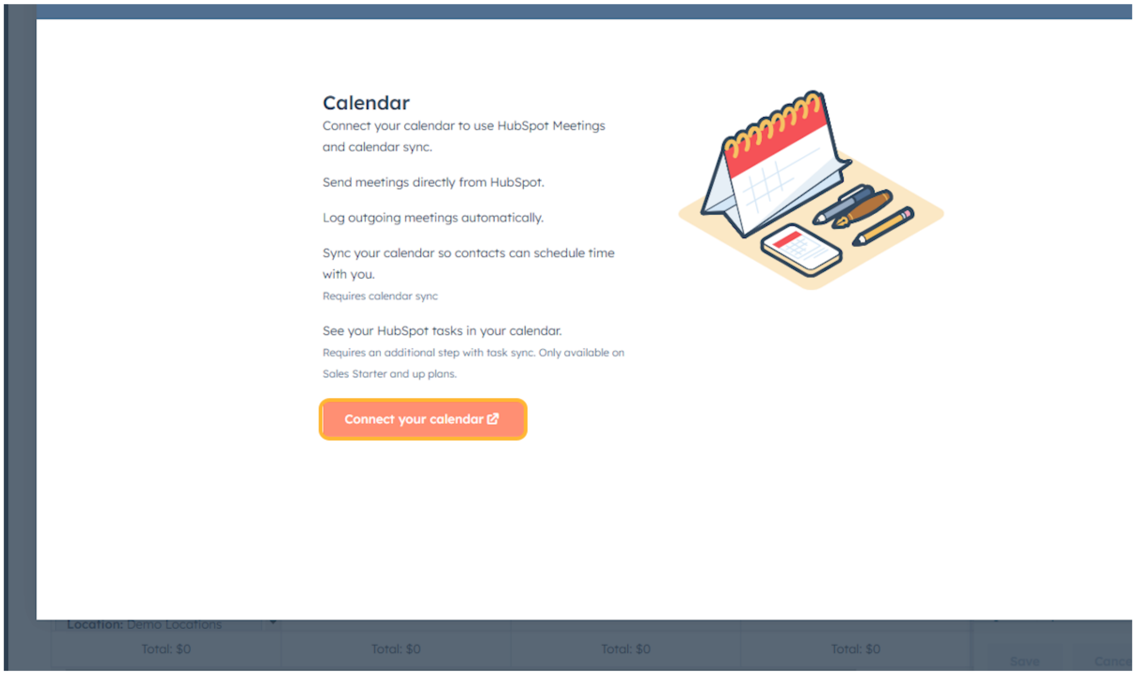
Click on Schedule a meeting



STEP 19

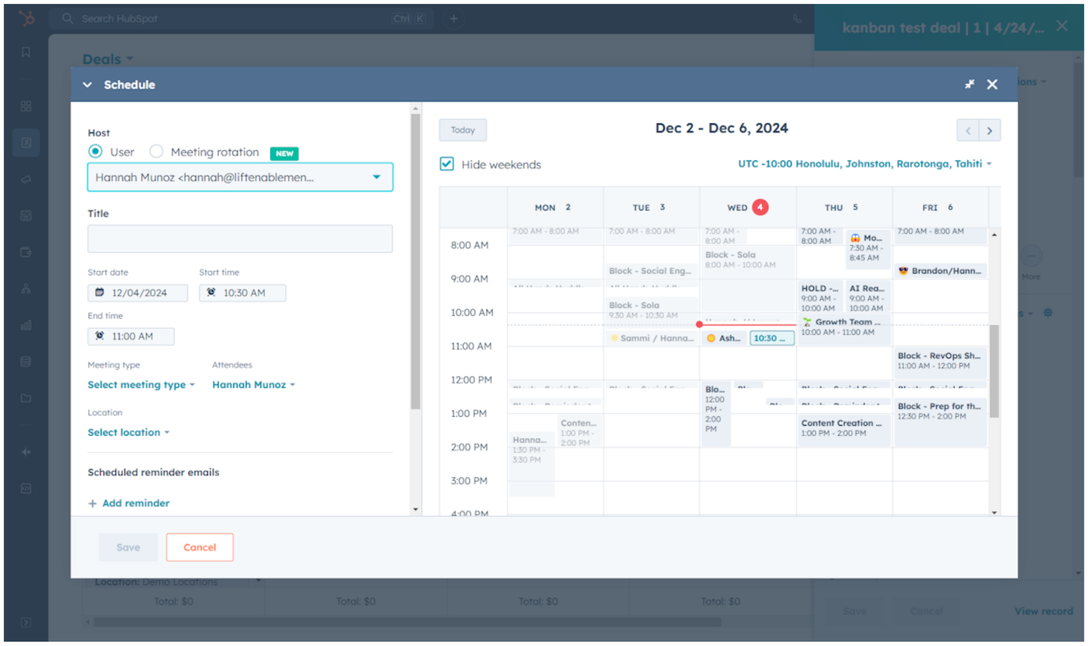
Note: Make sure your calendar is connected to HubSpot

If it is not, Click Connect your calendar and follow HubSpot's prompts.



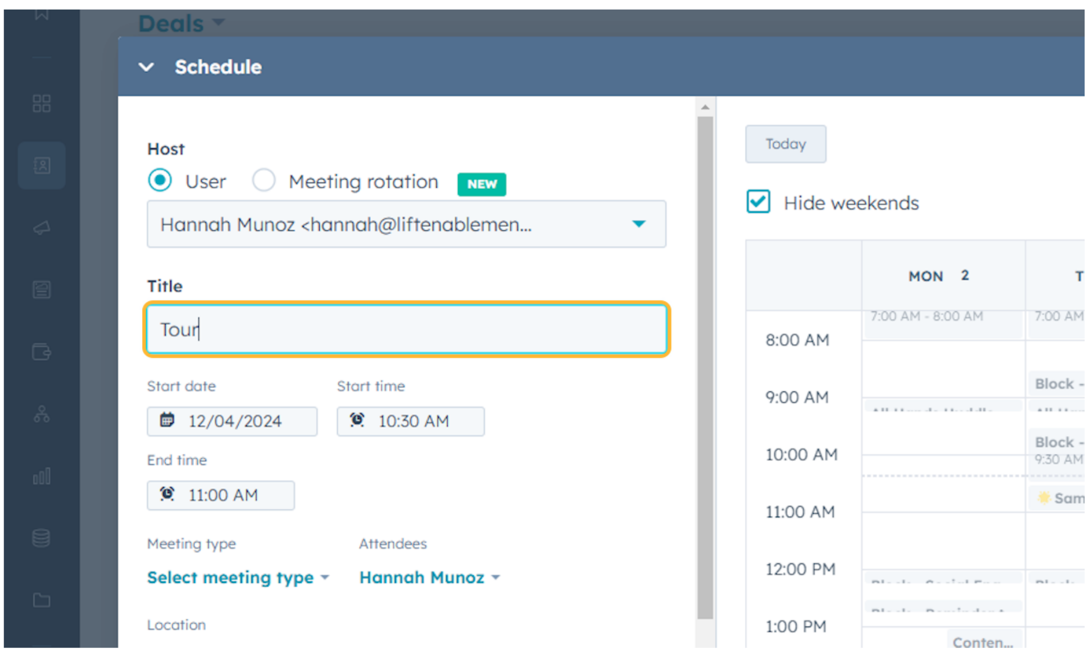
STEP 20

Once your calendar is connected, the Schedule box will appear



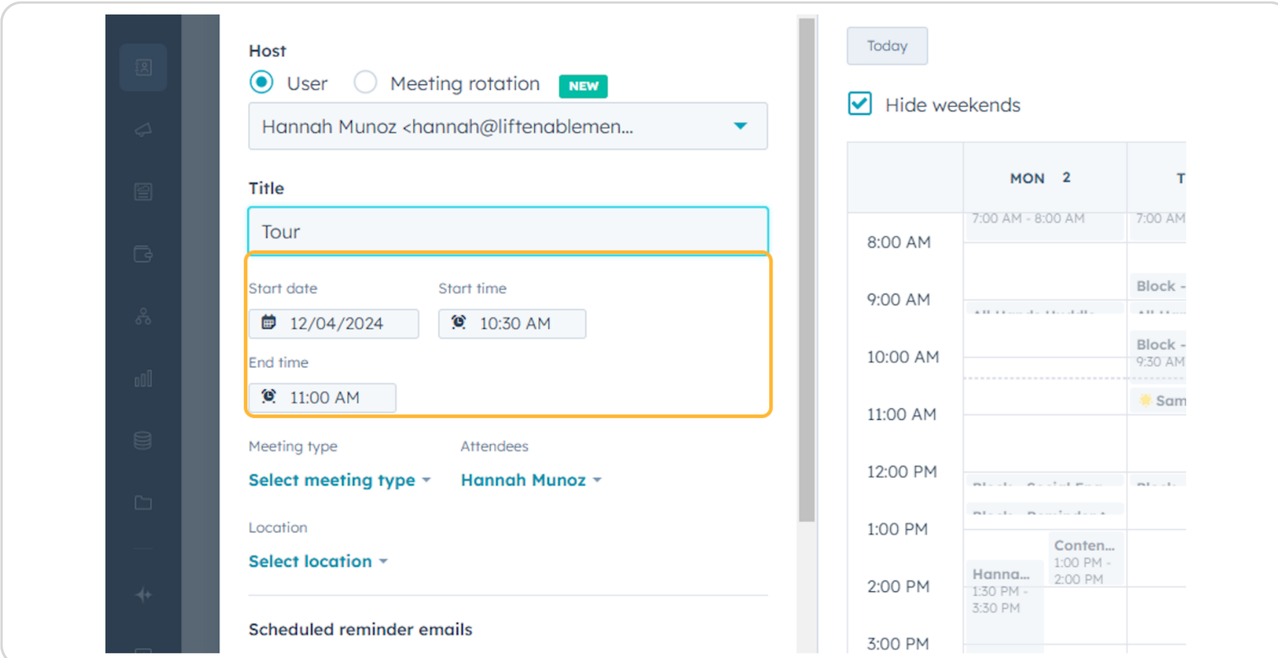
STEP 21

Update the Meeting Title



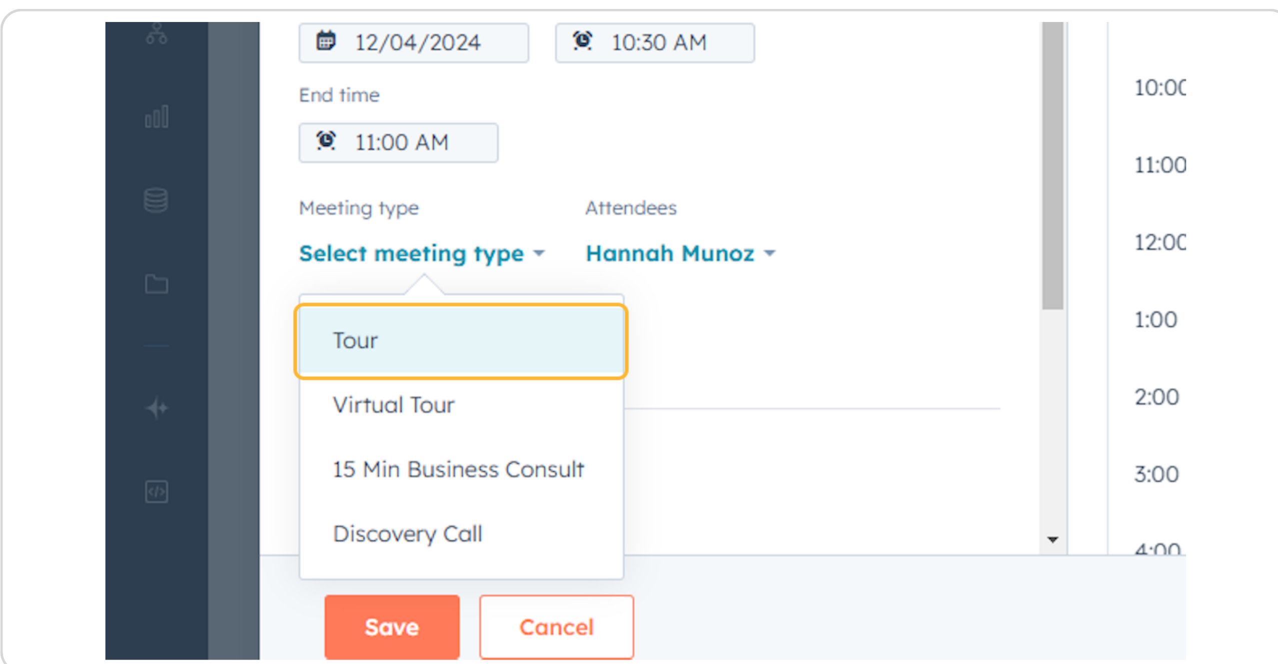
STEP 22

Update the Start date, Start time and End time



STEP 23

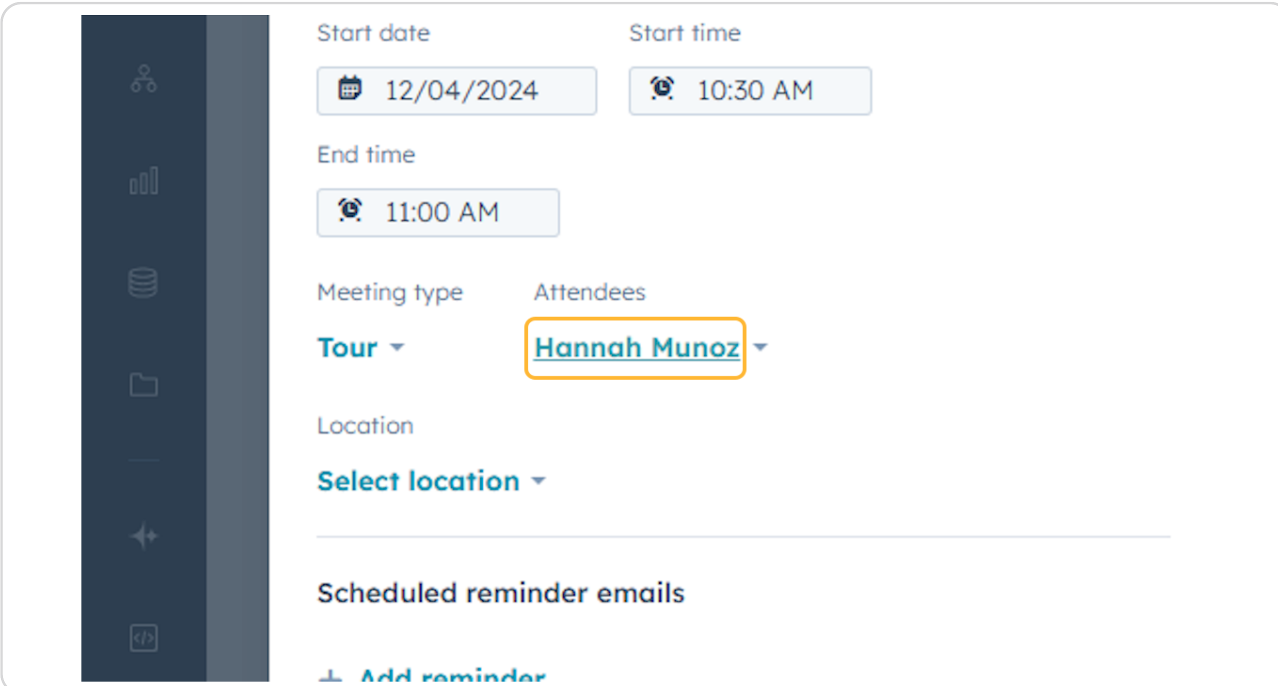
Update the Meeting type



STEP 24

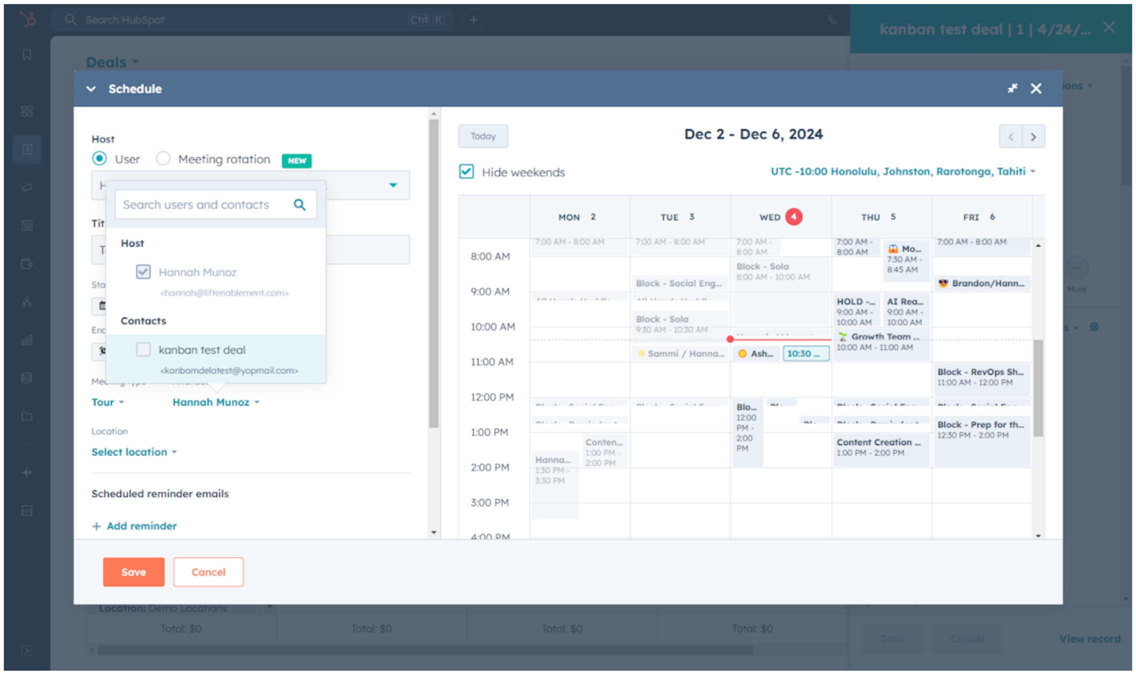
Make sure all attendees are included

Note: If you are scheduling a Tour, you will have to make sure the Pro is manually selected as an attendee.



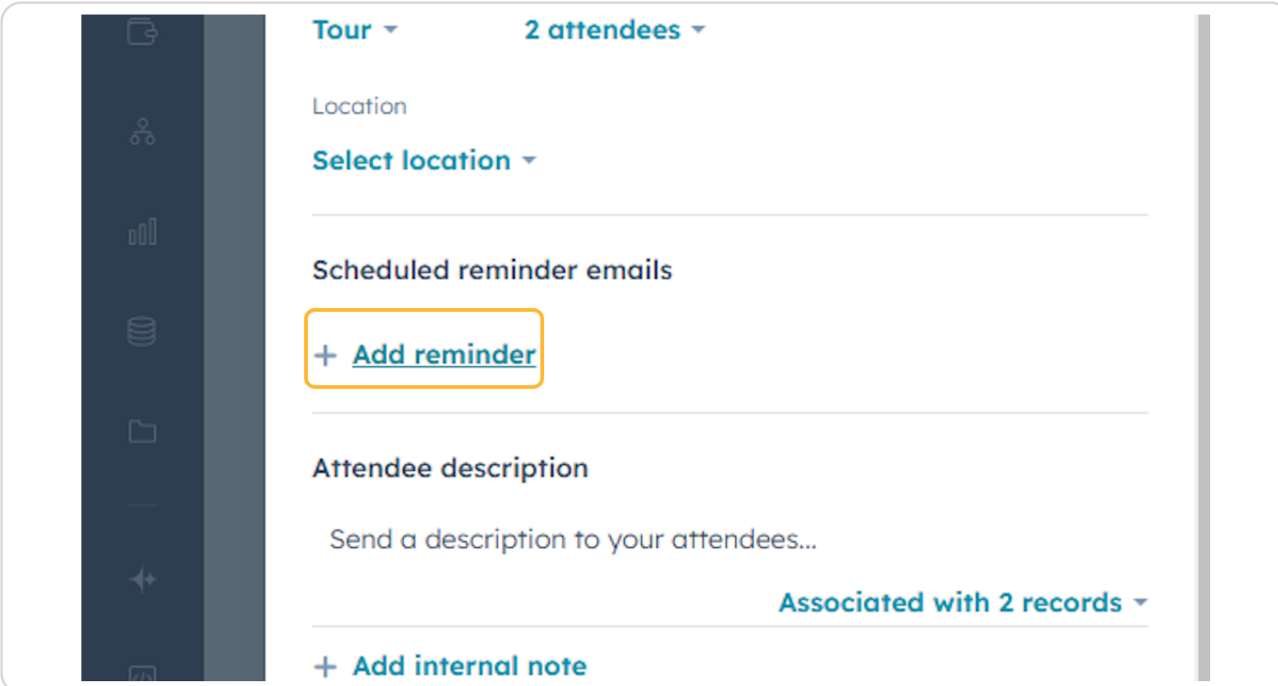
STEP 25

If you schedule the meeting off of a Deal, the associated Pro (Contact) will appear for you to click on. If not, you can search for their name.



STEP 26

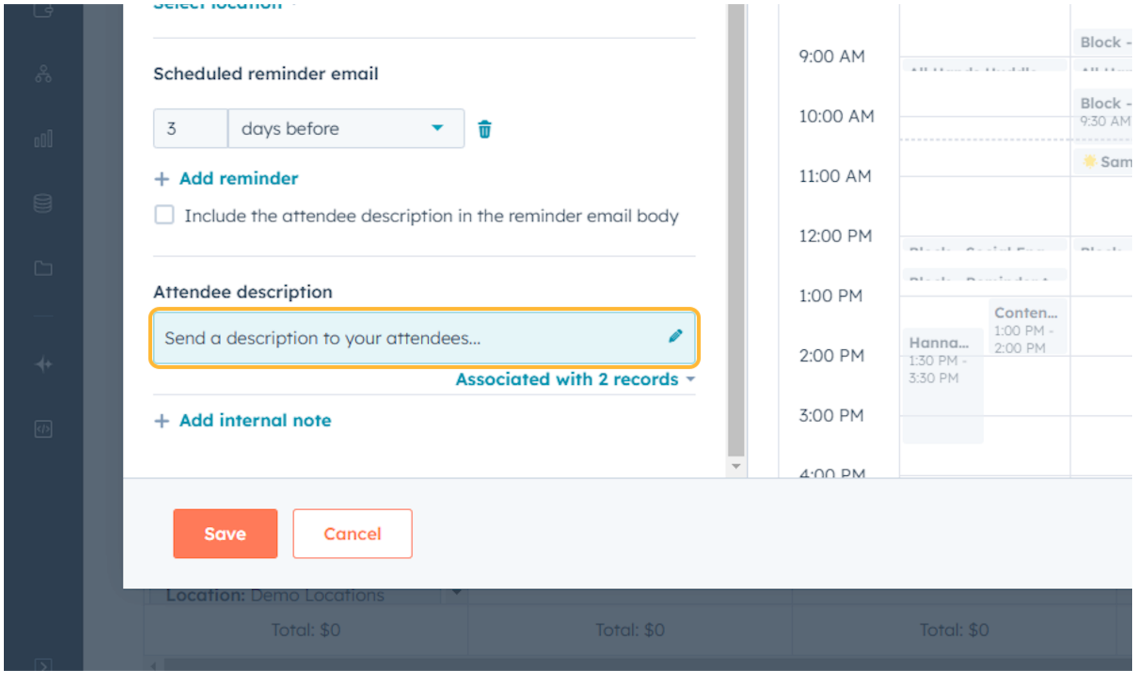
Include any reminder emails needed



STEP 27

Update the Attendee description

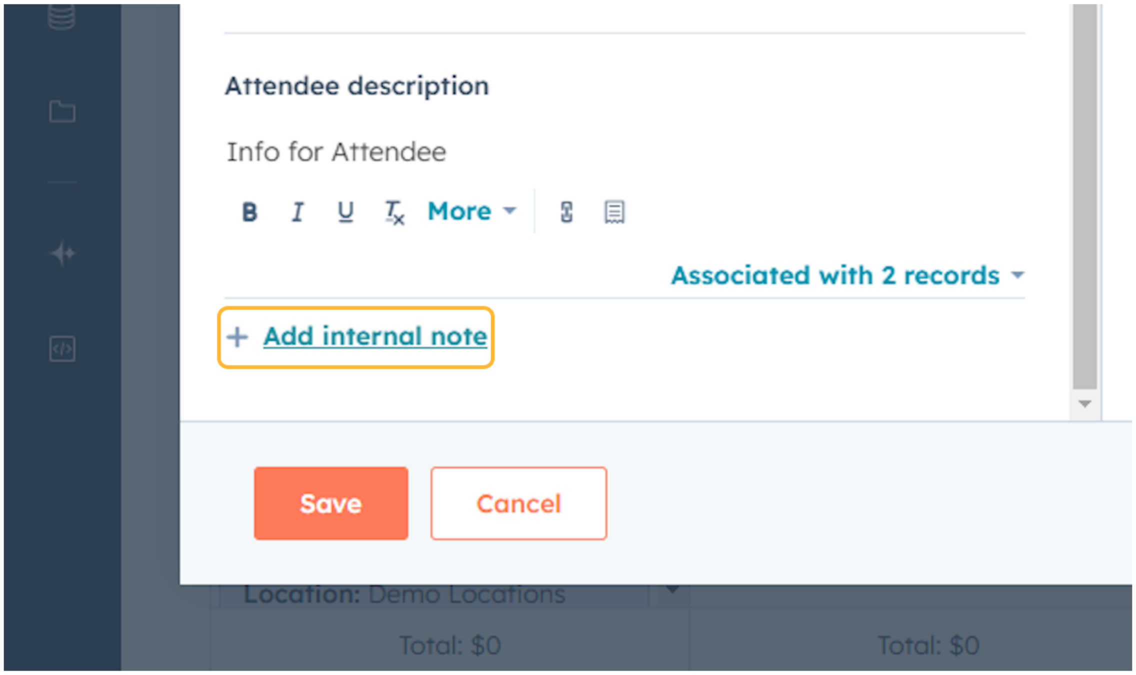
Note: This description will be what the attendee will see.



STEP 28

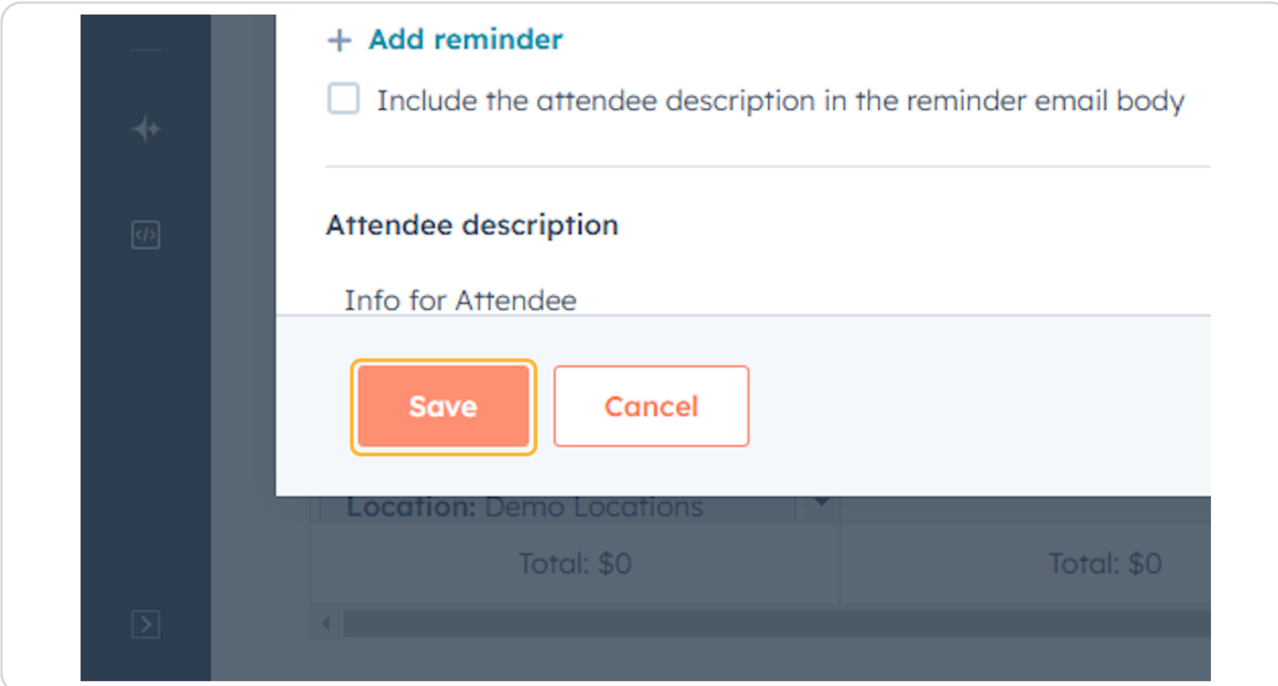
Add an internal note (optional)

This note will only be seen by you or anyone else on the team that is joining the meeting.



STEP 29

Click on Save



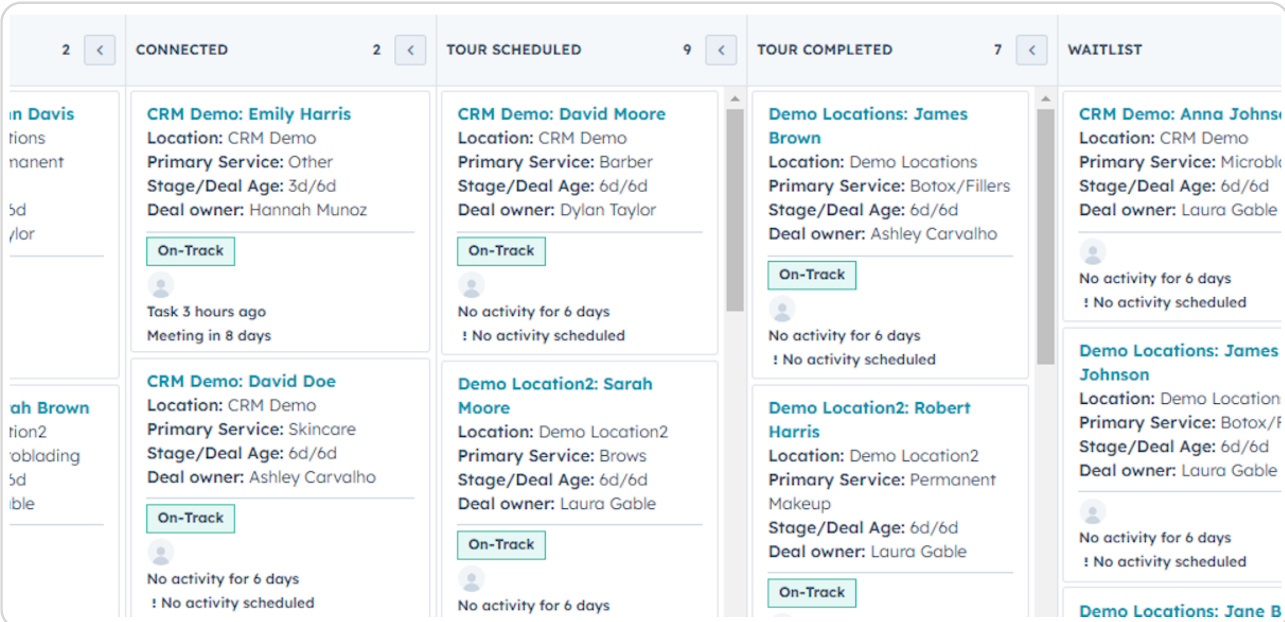
Log an Item

10 Steps

As you are having conversations with a Pro outside of HubSpot, you are able to log those items to the record.

STEP 30

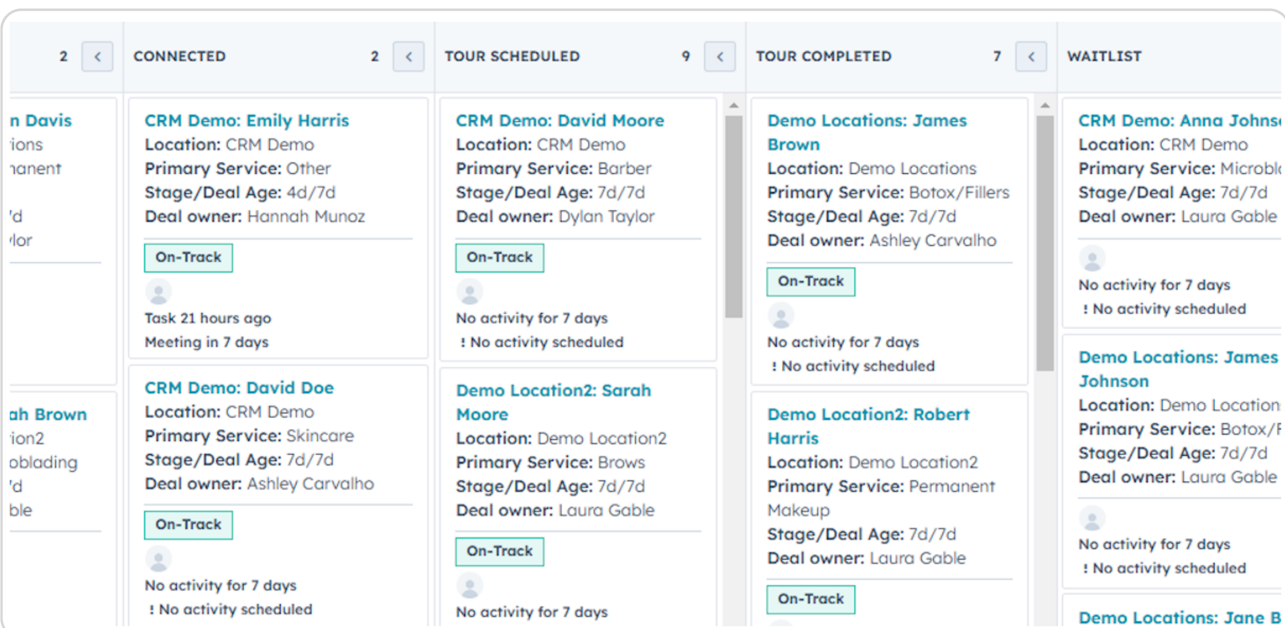
Click on the More button



STEP 31

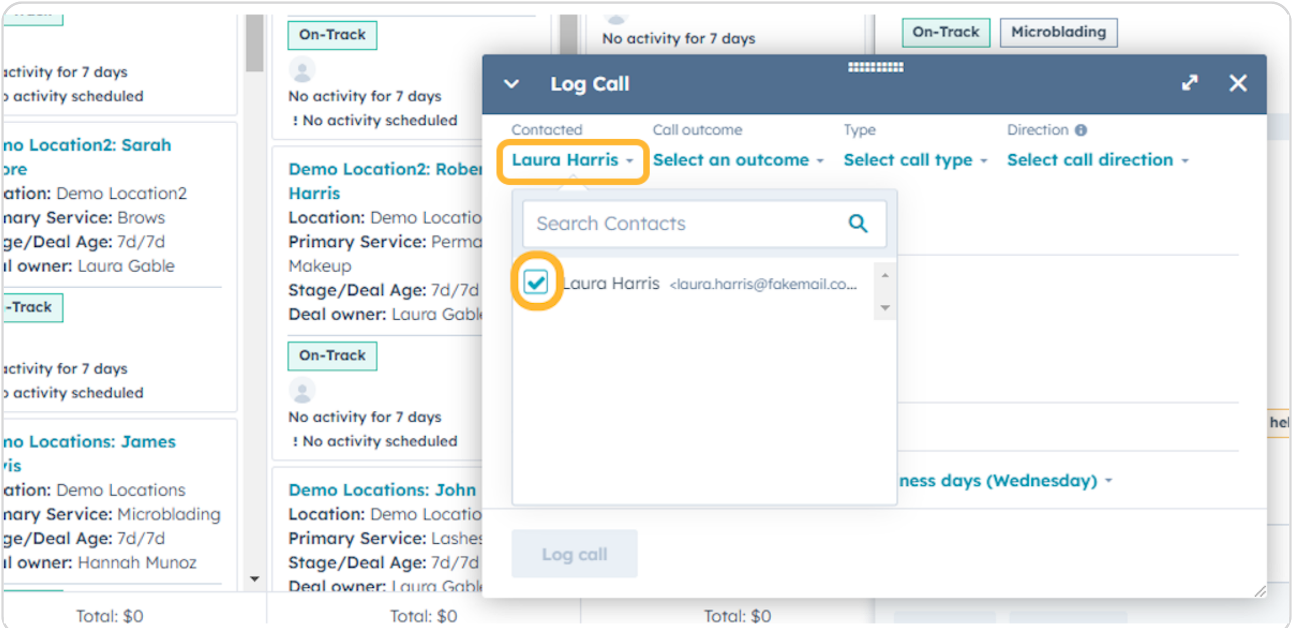
Choose what you want to log

For this example I'll log a call.



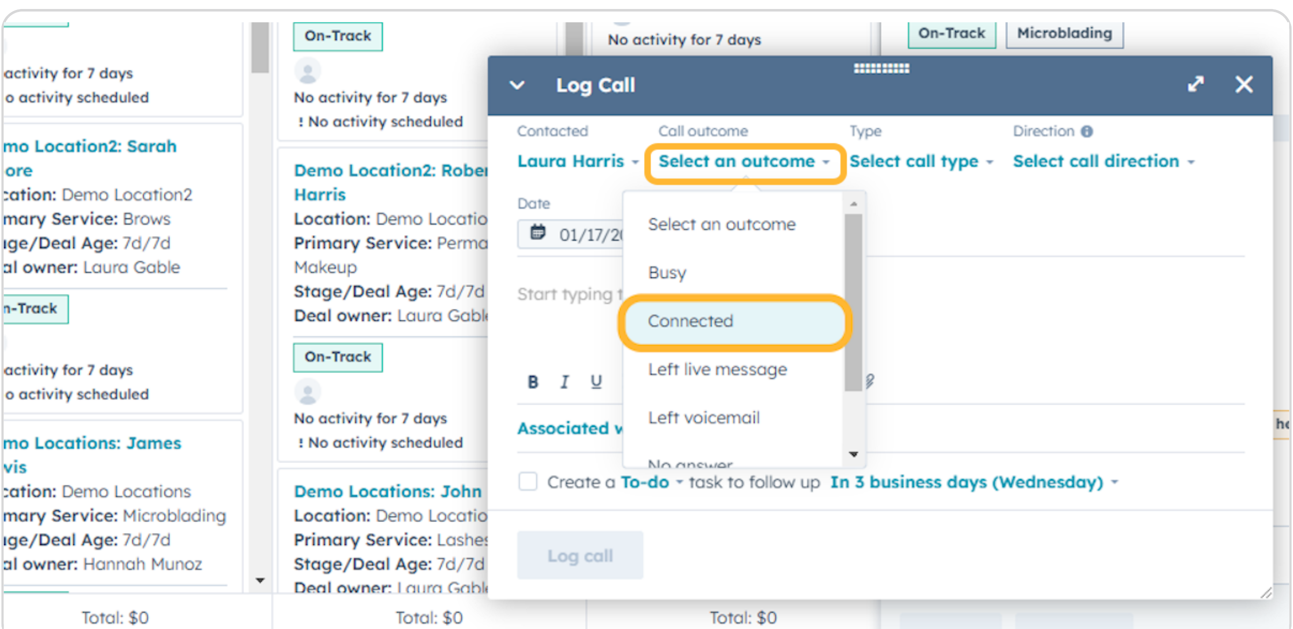
STEP 32

Include the Pro that was involved



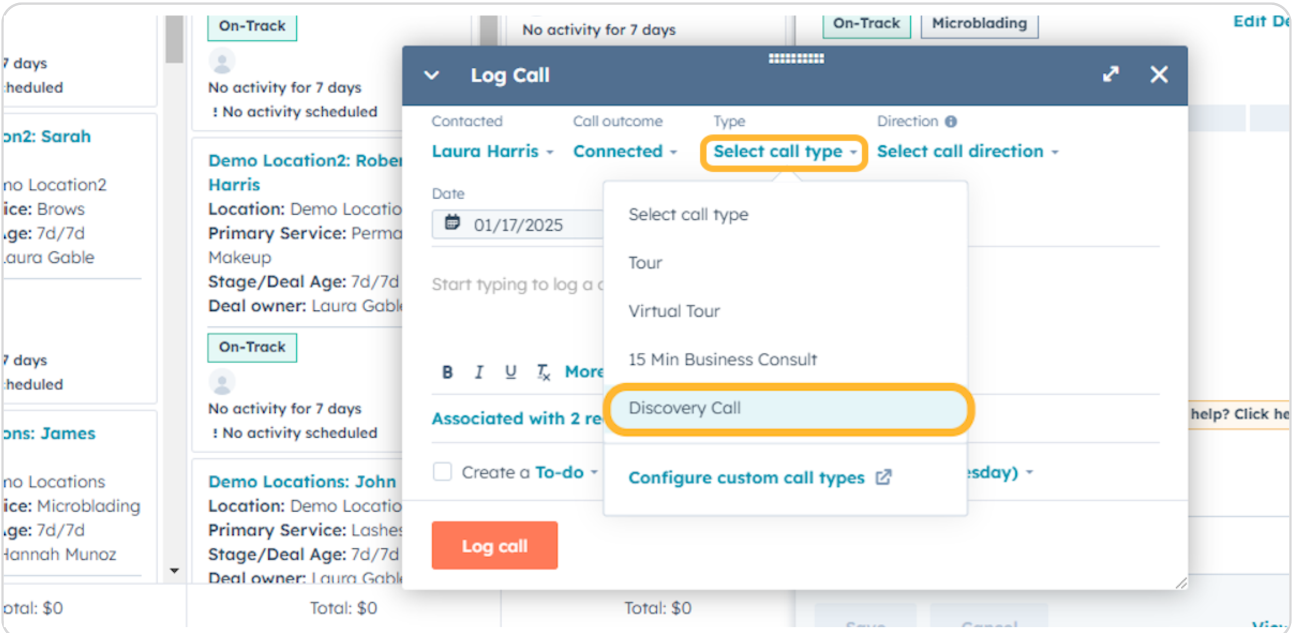
STEP 33

Update the Call outcome



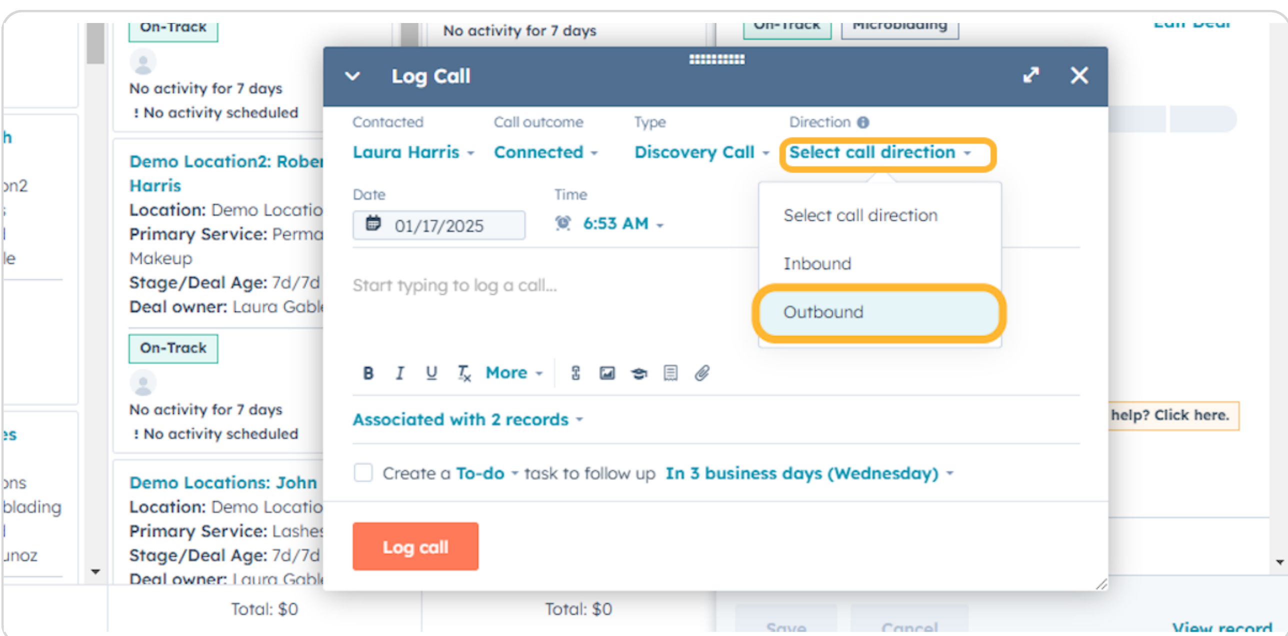
STEP 34

Update the Call Type



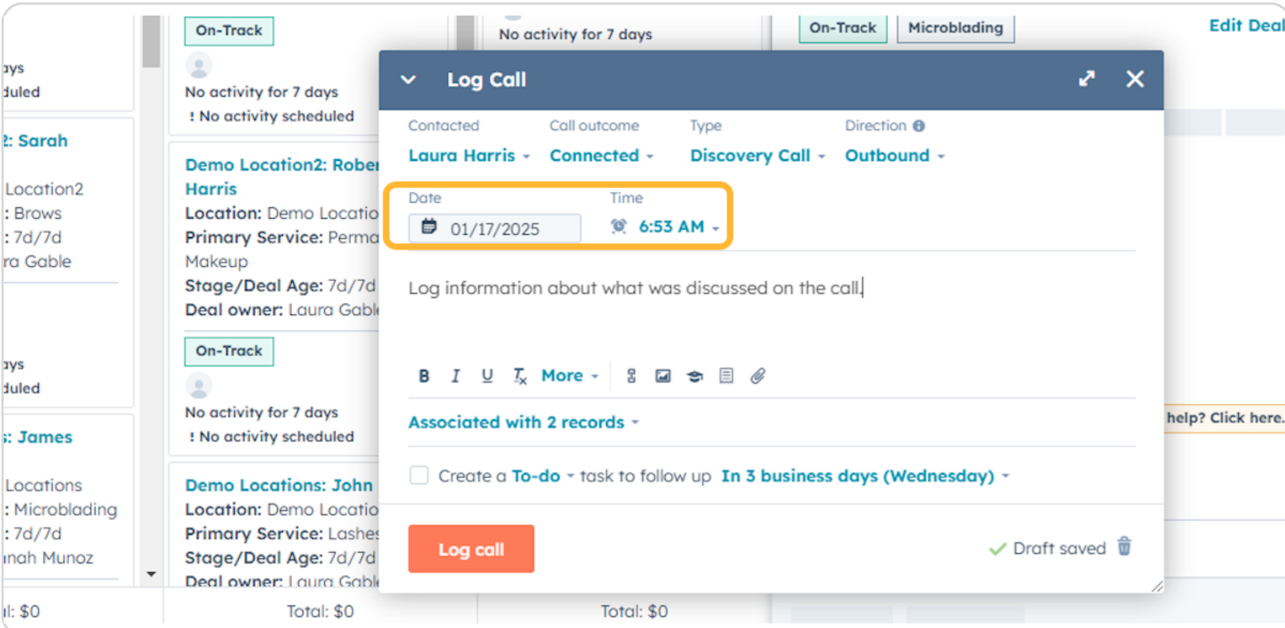
STEP 35

Update the Direction of the Call



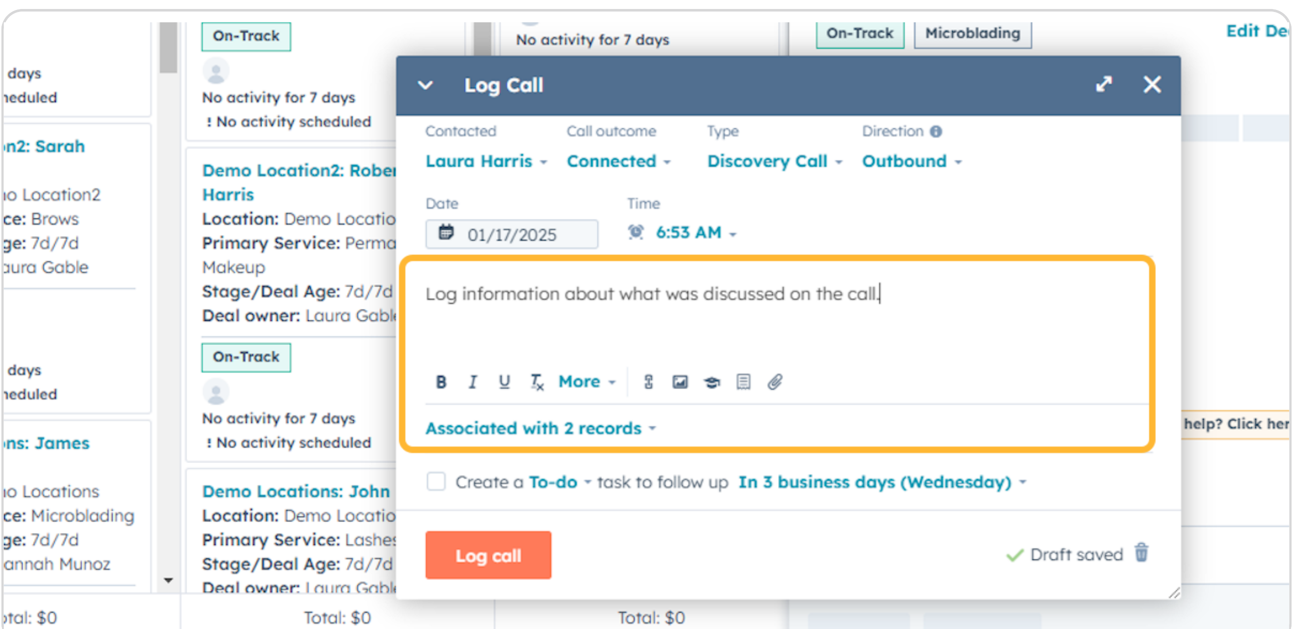
STEP 36

Update the Date and Time of the Call



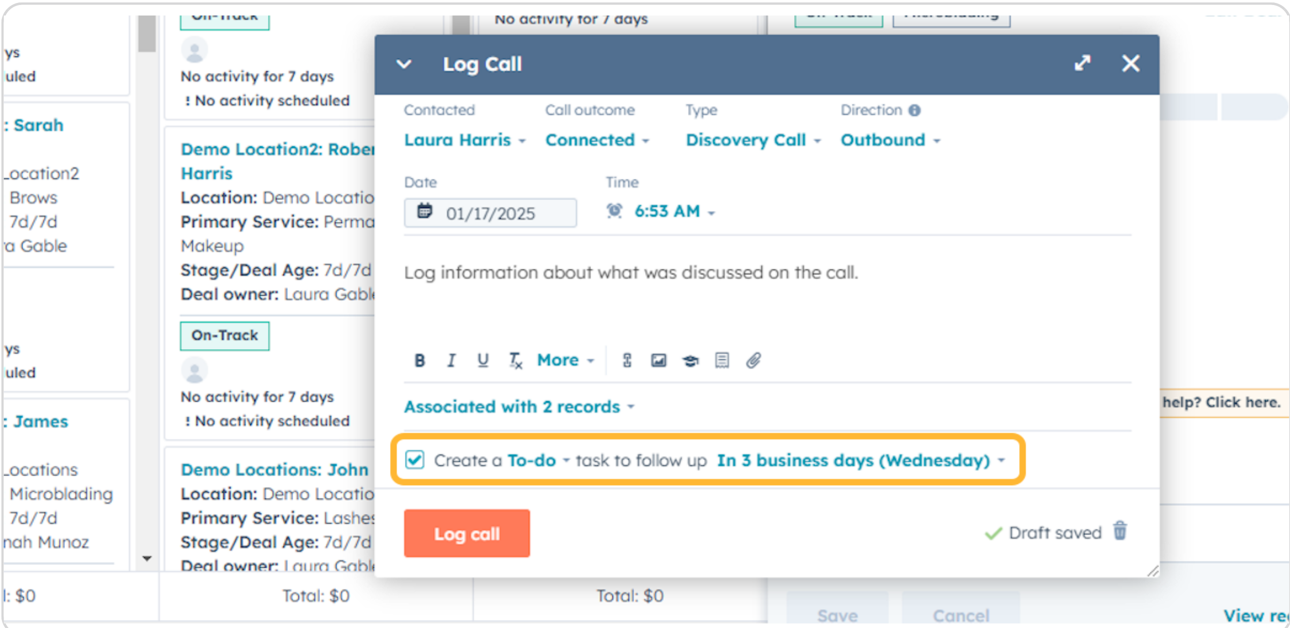
STEP 37

Include details about the Call



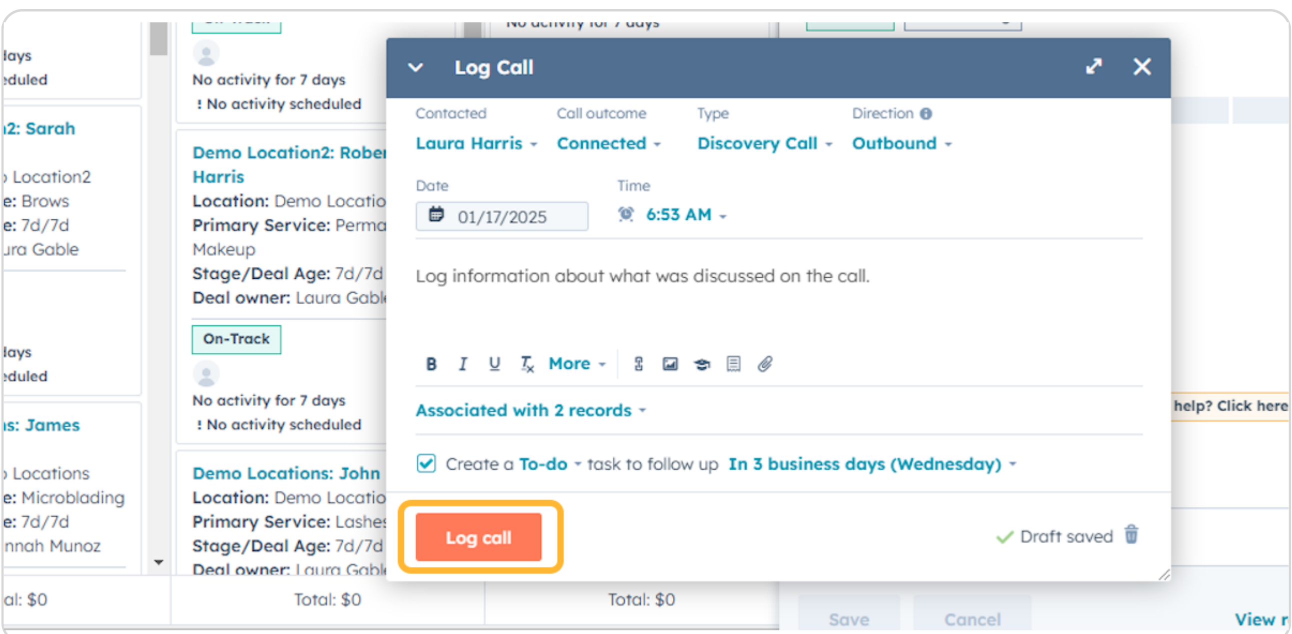
STEP 38

Create a Follow-Up Task if needed



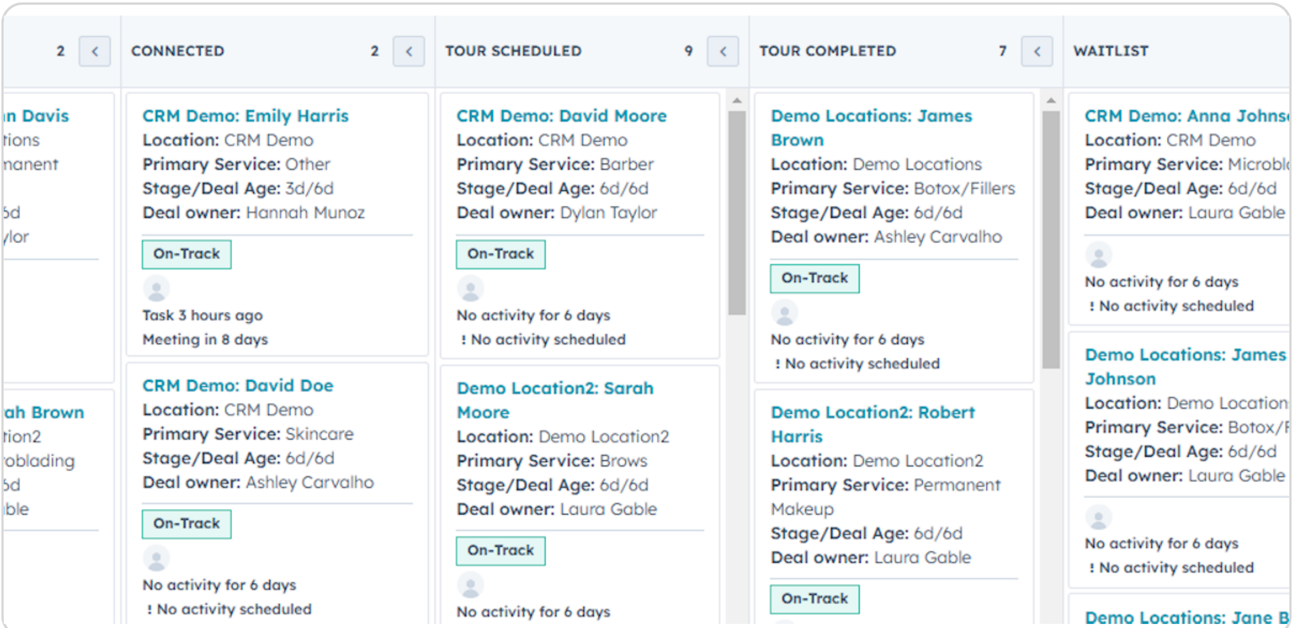
STEP 39

Click Log call



STEP 40

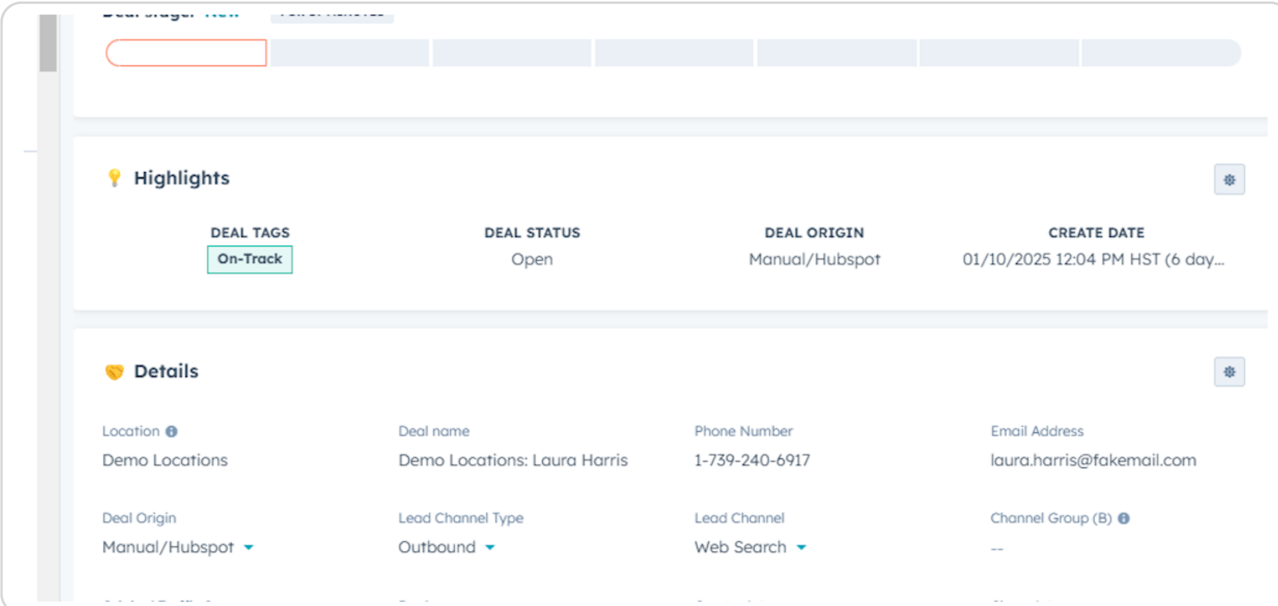
Click on View record at the bottom of the Deal Card Preview



STEP 41

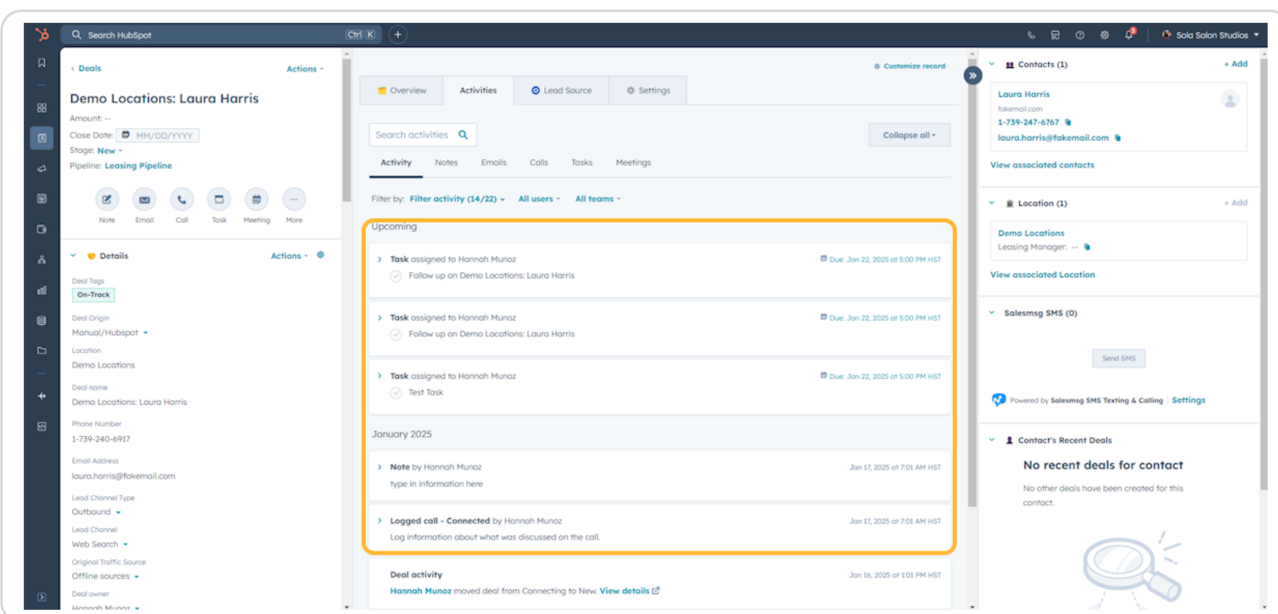
Click on Activities in the center of the record

Note: To the left-hand side, the activity buttons are located towards the top of the record. You can create notes, tasks and meetings from here, too.



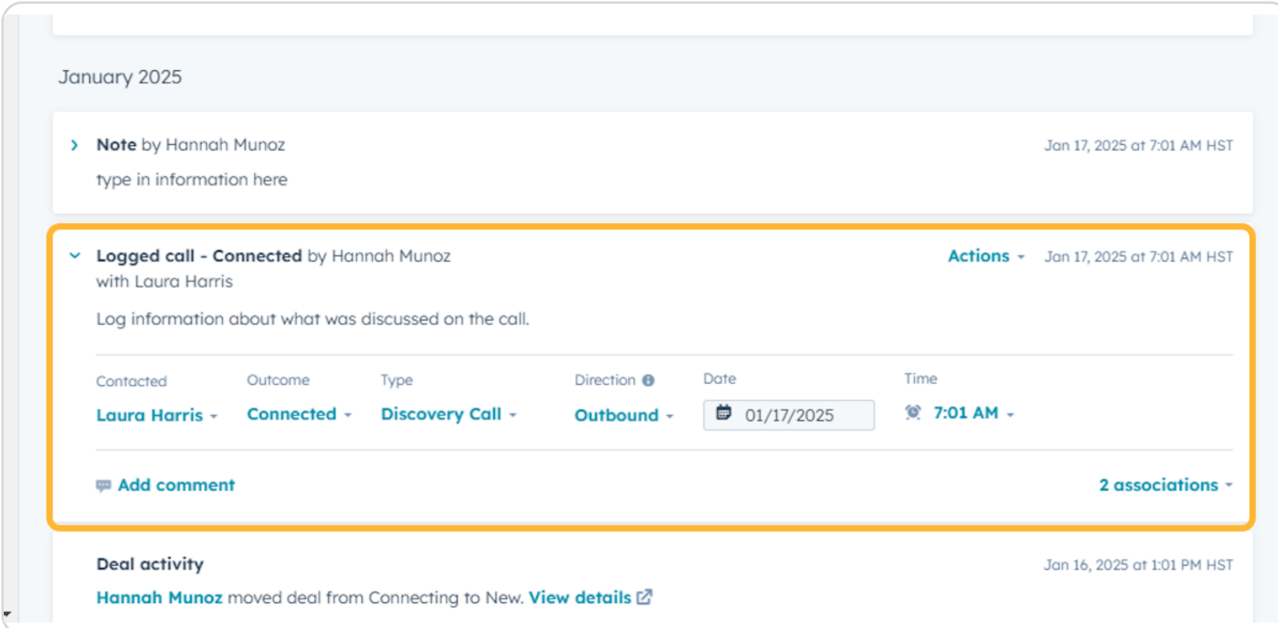
STEP 42

On the Activity tab you will see the activities you created



STEP 43

To see all the information on an activity, click the arrow next to the activity and it will open up



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