# Sola Salon Studios - Overview of HubSpot's Mobile App

HubSpot's mobile app is great for when you're on the go. In this guide, we'll walk you through how to navigate through the app and how to make sure your app is set up so that you can be productive even when you're not by your computer.

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

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# # Open up the HubSpot Mobile App

Note: Make sure you have downloaded the app to your phone.

#### STEP 1

### Welcome to the mobile app home screen

On this screen, you'll see an overview of your items including upcoming tasks, your upcoming schedule, and some other items that you can quickly view.



# # How to Access the App's Navigation

3 Steps





Click on the Hamburger menu in the top left-hand corner

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# This will take you to the app's navigation

Not everything from the desktop can be viewed in the app, so the navigation will look different. This is the quickest way to jump into where you want to be within the app.

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Scroll down on the navigation to see the rest of the available elements for you to work with



# **#** How to Update Notifications

6 Steps

Back on the Home Screen, to update notifications that you receive to your phone, Click on the bell icon in the top right-hand corner

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This will take you to a screen that will show you any recent notifications. Click on the 3 dots in the top right-hand corner





# **Click on Notification settings**

Note: If you do not have notifications enabled for the app, you will need to go into your phone settings for the app and turn them on.

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From here choose which notifications you want to update by clicking into the specific section. For example Click into Deals

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Choose what notifications you want or do not want to receive. When you are done, Click the back arrow





# Scroll on the notifications screen to access all areas where you can get notifications.

Note: If you have any issues with notifications, you can access helpful documentation by clicking Troubleshoot notifications at the very bottom.

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# **#** Utilizing the Search Feature

7 Steps

Another easy way to find what you're looking for in the app is by using the search feature to quickly look up a term and access a record you need. For example, instead of combing through all of your Deals, if you have the name of the Deal, you can search for it and easily find the Deal record.









Click in the Search bar and type a word or name that you are looking for





The app will pull up any records that have similarities to your search



#### **STEP 14**

# Scroll down on the All tab to see all search results

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## Click on a specific tab at the top to narrow down your search

For example, if you're looking for a specific deal, Click on the Deals tab to cancel out the rest of the search noise from the All tab.

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STEP 16
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When you find the record you're looking for, Click the record

### **STEP 17**

# The app will take you into the record overview

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# From the Home Screen, utilize the navigation in the top left-hand corner OR Click on the Deals button

Note: This Deals button is only on the Home Screen. If you are anywhere else in the app, you will need to utilize the navigation menu or go back to the Home Screen.





## The Deals button will take you to an overview of all Deals

Note: The kanban view will look a little different here. The screen is sectioned off by pipeline stage and will only show one stage at a time. You can swipe over to view Deals in other stages of the pipeline.

Deal names have been blurred for confidentiality reasons.





To easily find your Deals, Click Add Views at the top of the screen



#### STEP 21

### Check off My deals

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## **Click Done**





# Now you have filtered down to your Deals so you can quickly locate Deals that need updated

Note: Ignore the deal score number.

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## You'll be taken to the Deal record

Note: The layout of the Deal record within the app will look different to the desktop view. At the top of the record you'll be able to log activities, add notes, create tasks, and more. This is also where you can update the stage of the Deal.

Again, ignore the Deal Score.

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Deal score Learn more
Since Jan 10, 2025
Home Contacts Tasks Dashboards Search



# The first tab you will see on a Deal record is the Overview tab

Within this section you can see any Recent activities and create Next activities.

Note: Ignore the Deal Score.

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On the Activity tab you'll see all activities logged to the Deal to include meetings, upcoming or overdue tasks, notes left on the Deal and any other updates. Note: You have the option to Filter Activity to make it easier to find what you're looking for within the timeline.

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Home Contracts Tasks Desthboards Search



The Associations tab will show you where the Deal is connected. This will include the Pro (Contact). If there are any other associations needed, you are able to add them by Clicking on the plus button



## The About tab will show you all of the details of the Deal.

Note: You can scroll on any tab to see more information. On the About tab there will be information on:

- $\cdot$  Deal Details
- Tour Info
- Deal Discovery
- Lead Source
- Campaign Info
- Closing Details



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To edit the information on the About tab, Click on Edit Deal

### STEP 31

## Click on the item that needs updated

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Create Date Jan 10, 2025		
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# Make your updates and Click Save

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### STEP 33

# Your Deal will be updated

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Location CRM Demo		
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Phone Number 1729-222-1234		
Email Address emily.harris@dumm	yemail.com	
Lead Channel Type		



If you need to access a Pro (Contact) record, Click on the Contacts button at the bottom of the screen

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### This will take you to All contacts

Note: Like with Deals, you can add a view to filter to the Pros that are owned by you.

Names of Pros (Contacts) have been blurred for confidentiality reasons.

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