

# Sola Salon Studios - Scheduling Tours Directly in HubSpot

This step-by-step guide will walk you through the Easy Tour Scheduling in HubSpot. If you are actively talking to a Pro, you can schedule a tour with them from the Deal they're connected to.

23 Steps [View most recent version](#) 

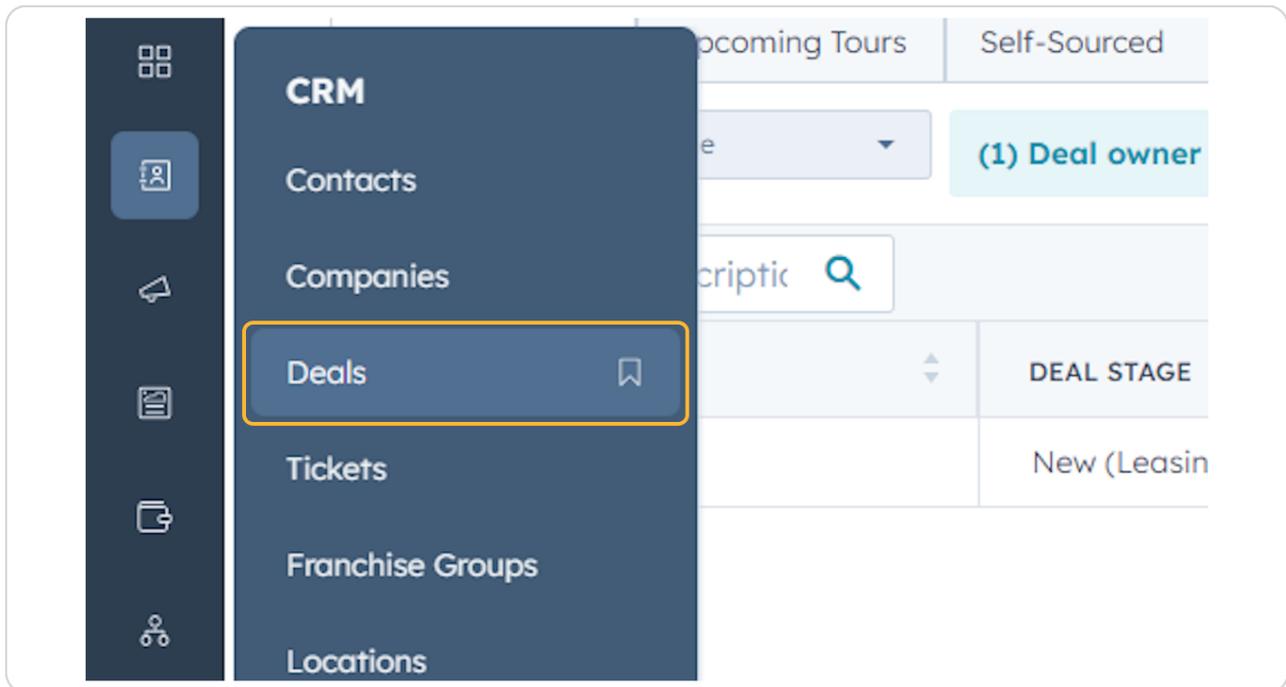
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Created by	Creation Date	Last Updated
Doug Davidoff	Nov 08, 2024	Jan 17, 2025

## STEP 1

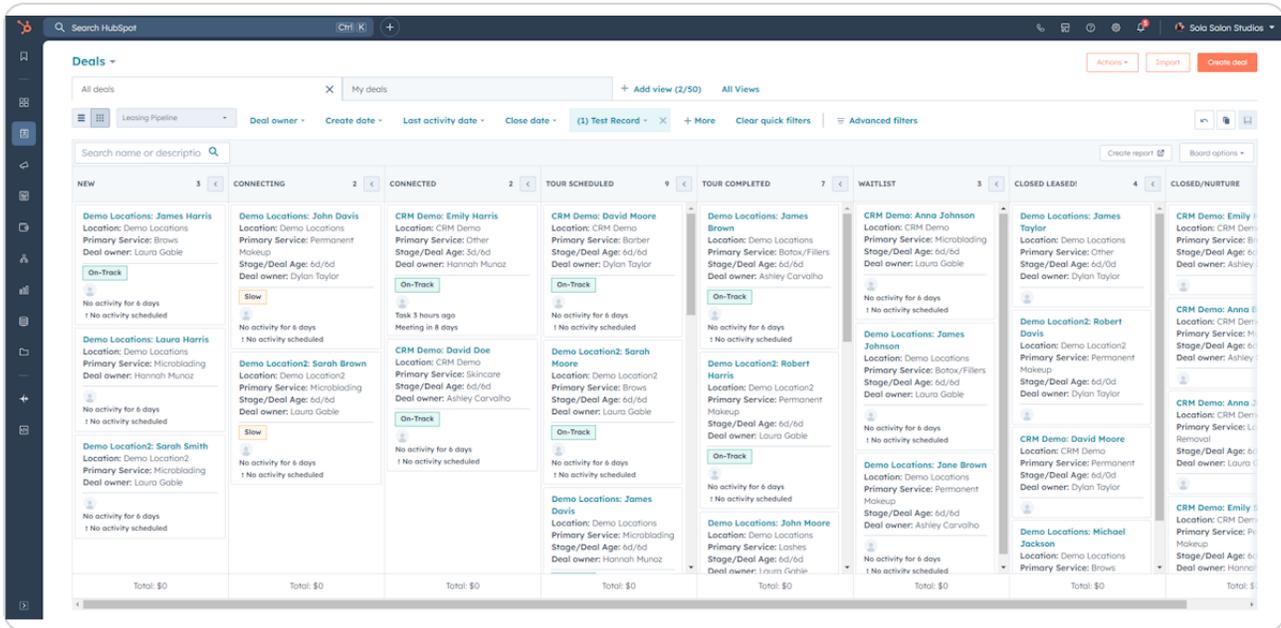
### If you aren't already in Deals, Navigate to Deals

Hover over the CRM section in the navigation to the left and Click on Deals



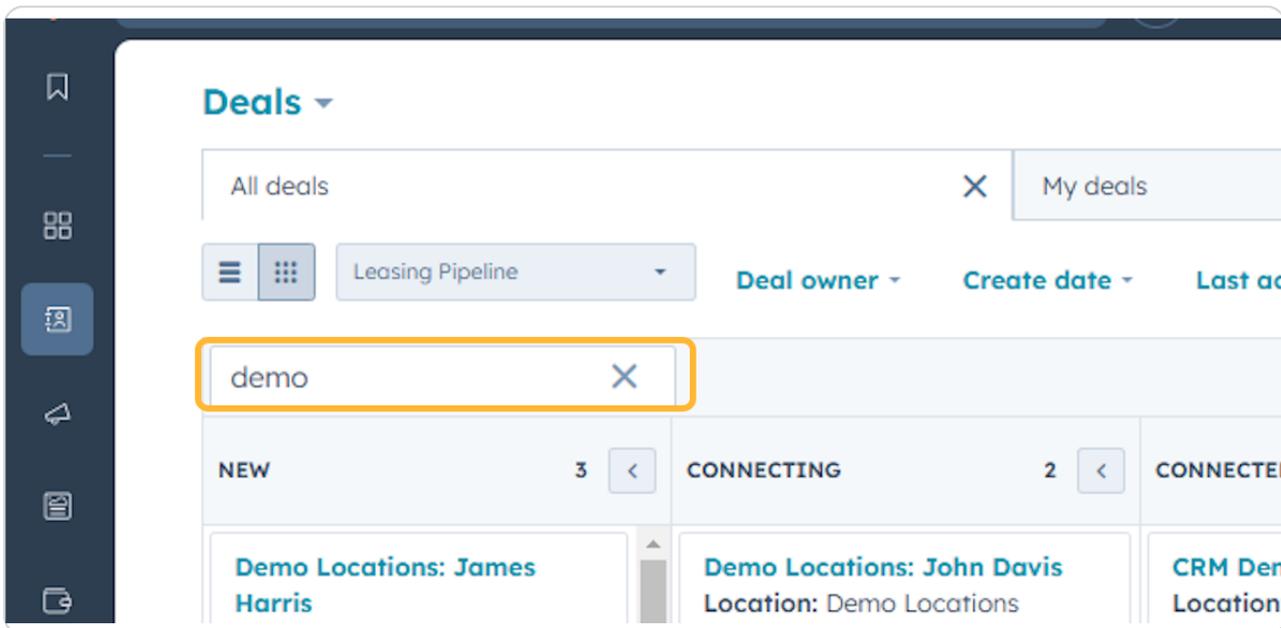
## STEP 2

You'll be taken to the Deals index page



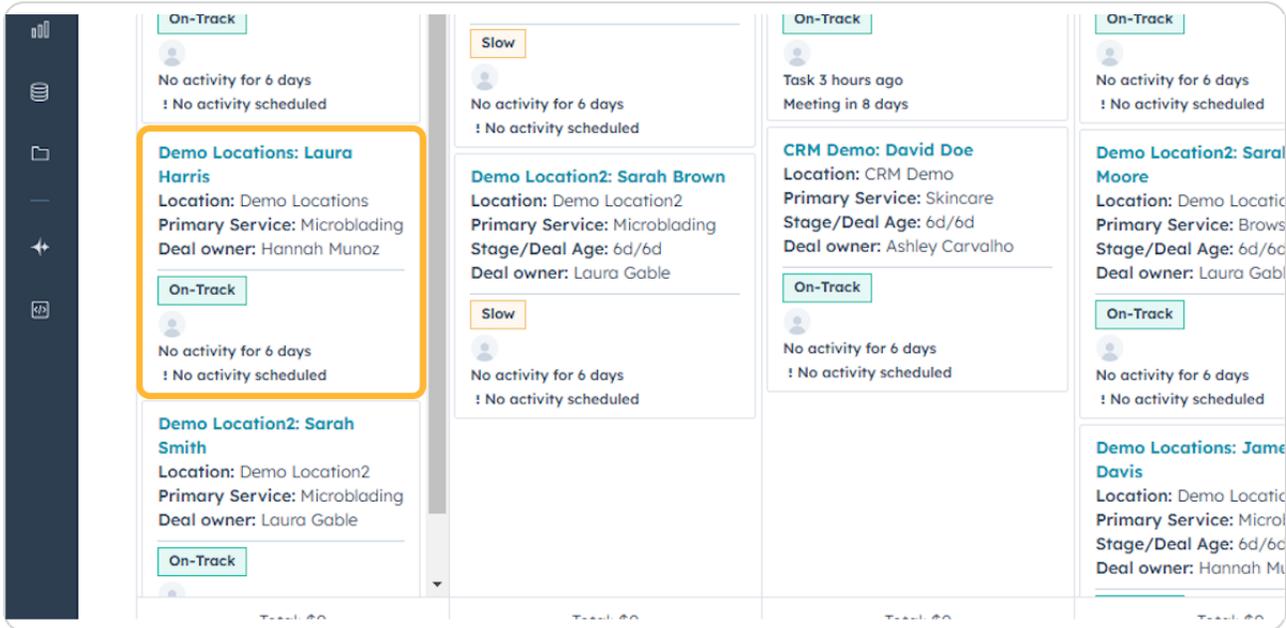
## STEP 3

To find the Deal you're looking for, you can Search for the Deal



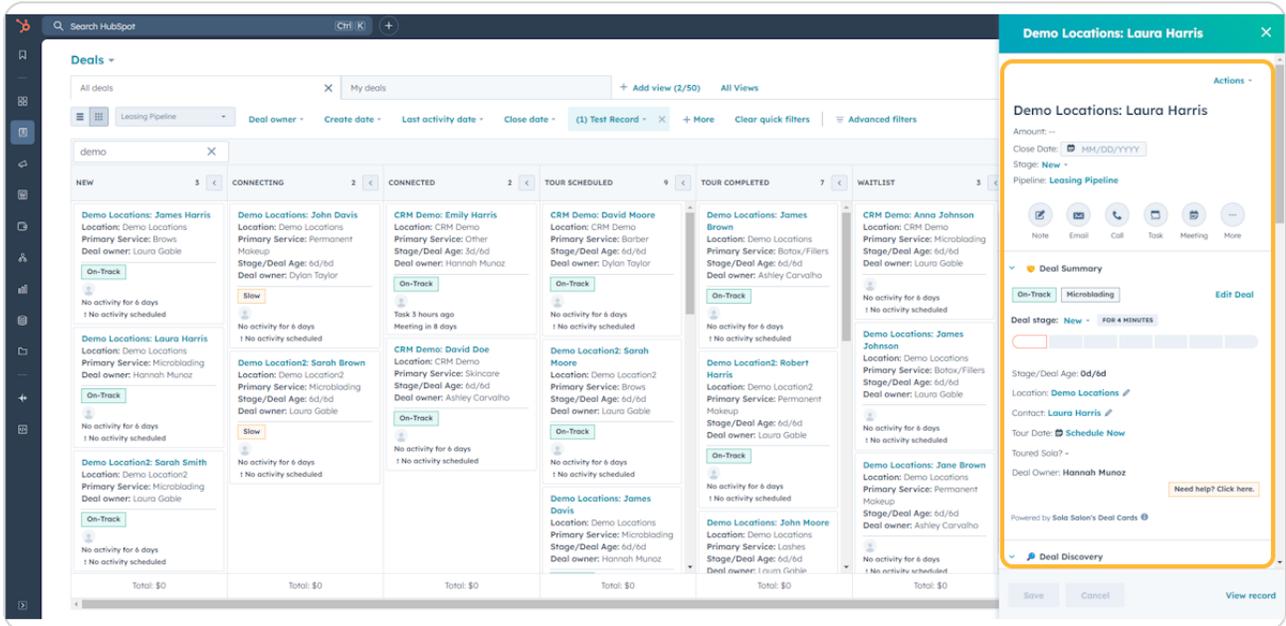
## STEP 4

Hover over the Deal you need to schedule a tour for and Click in the open space within the box



## STEP 5

A Preview of the Deal will appear



## STEP 6

### Click on Schedule Now next to Tour Date in the Deal Summary

The screenshot shows a CRM interface with a deal summary. On the left, there are two panels for 'Demo Locations: James Johnson' and 'Demo Locations: Jane Brown'. The main area displays deal details: 'Deal stage: New' with a 'FOR 4 MINUTES' badge, a progress bar, 'Stage/Deal Age: 0d/6d', 'Location: Demo Locations', 'Contact: Laura Harris', 'Tour Date: Schedule Now' (highlighted with an orange box), 'Toured Solo? -', and 'Deal Owner: Hannah Munoz'. A 'Need help? Click here.' link is in the bottom right.

no activity for 6 days  
! No activity scheduled

**Demo Locations: James Johnson**  
Location: Demo Locations  
Primary Service: Botox/Fillers  
Stage/Deal Age: 6d/6d  
Deal owner: Laura Gable

No activity for 6 days  
! No activity scheduled

**Demo Locations: Jane Brown**  
Location: Demo Locations  
Primary Service: Permanent

Deal stage: **New** FOR 4 MINUTES

Stage/Deal Age: 0d/6d

Location: **Demo Locations**

Contact: **Laura Harris**

Tour Date: **Schedule Now**

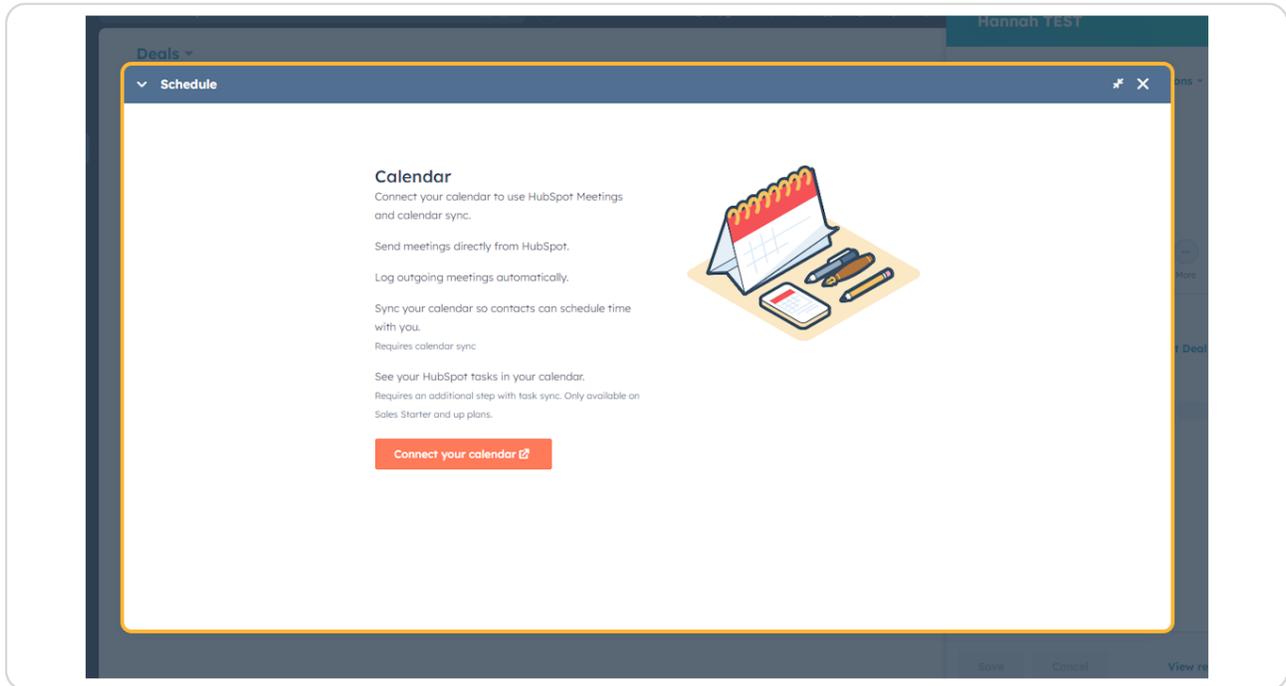
Toured Solo? -

Deal Owner: **Hannah Munoz**

Need help? Click here.

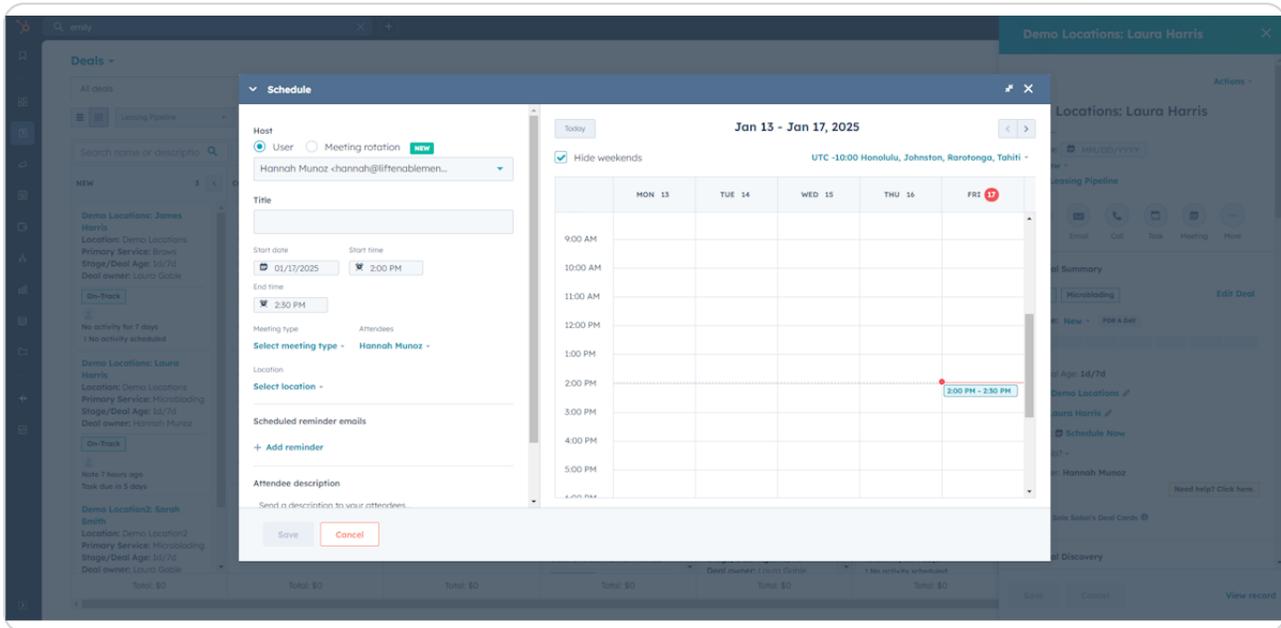
## STEP 7

**Note: You will need to connect your calendar to schedule a tour. Click the **Connect your calendar** button and follow the steps from HubSpot.**



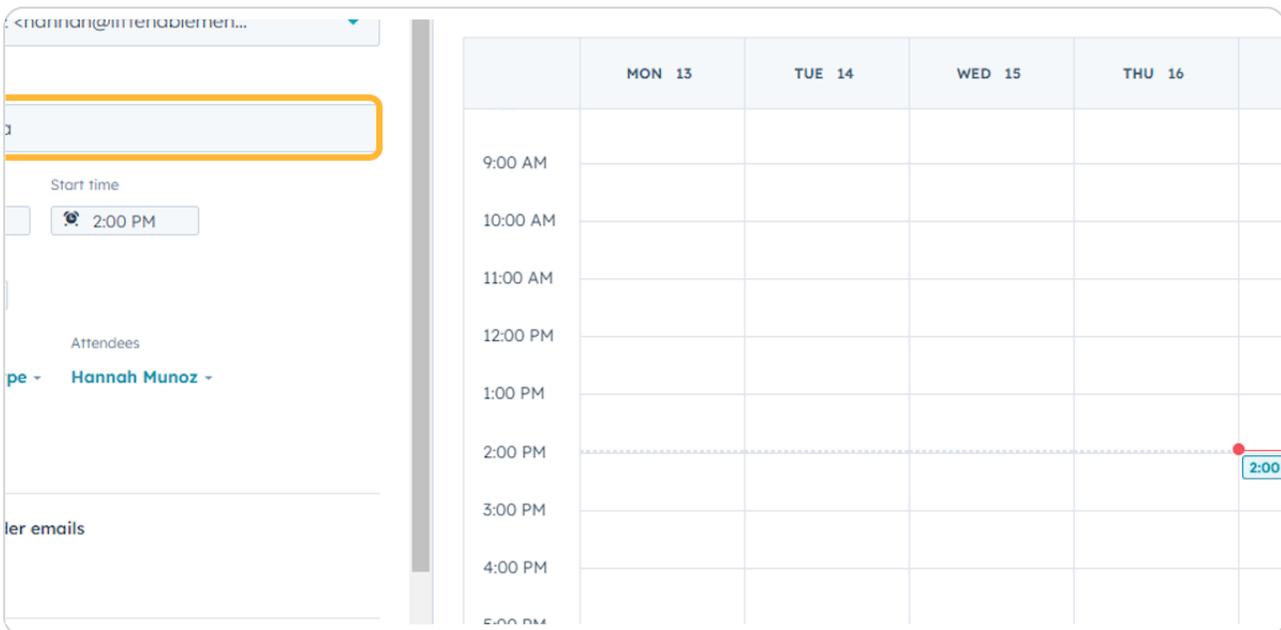
## STEP 8

If your calendar is connected, you'll see your calendar to schedule the tour



## STEP 9

Type in the Title of the Tour



## STEP 10

### Update the Start date

The screenshot shows a meeting scheduling interface. On the left, a sidebar contains the following information: a dropdown menu with the email address '<nannan@iitenapiemen...>', a 'Start time' field set to '2:00 PM', an 'Attendees' list with 'Hannah Munoz', and a 'Send emails' button. The main area is a calendar grid with columns for 'MON 13', 'TUE 14', 'WED 15', and 'THU 16'. The rows represent time slots from 9:00 AM to 5:00 PM. A red dot is placed on the 2:00 PM slot of Thursday, with a small blue box containing '2:00' next to it.

## STEP 11

### Update the Start time

The screenshot shows a meeting scheduling interface. On the left, a sidebar contains the following information: 'Attendees: James', 'Location: Laura Gable', 'Age: 1d/7d', '7 days scheduled', and 'Attendees: Laura'. The main area is a form for a meeting titled 'Tour with Laura'. The 'Start date' is '01/17/2025' and the 'Start time' is '2:00 PM'. The 'End time' is '2:30 PM'. The 'Meeting type' dropdown is open, showing options: '1:00 PM', '1:30 PM', '2:00 PM' (highlighted with a blue box), '2:30 PM', and '3:00 PM'. Below the form is a 'Scheduled reminder emails' section with an '+ Add reminder' button and an 'Attendee description' field. On the right, a calendar grid shows time slots from 9:00 AM to 5:00 PM. A red dot is placed on the 2:00 PM slot of Thursday, with a small blue box containing '2:00' next to it.

## STEP 12

### Select the Meeting type

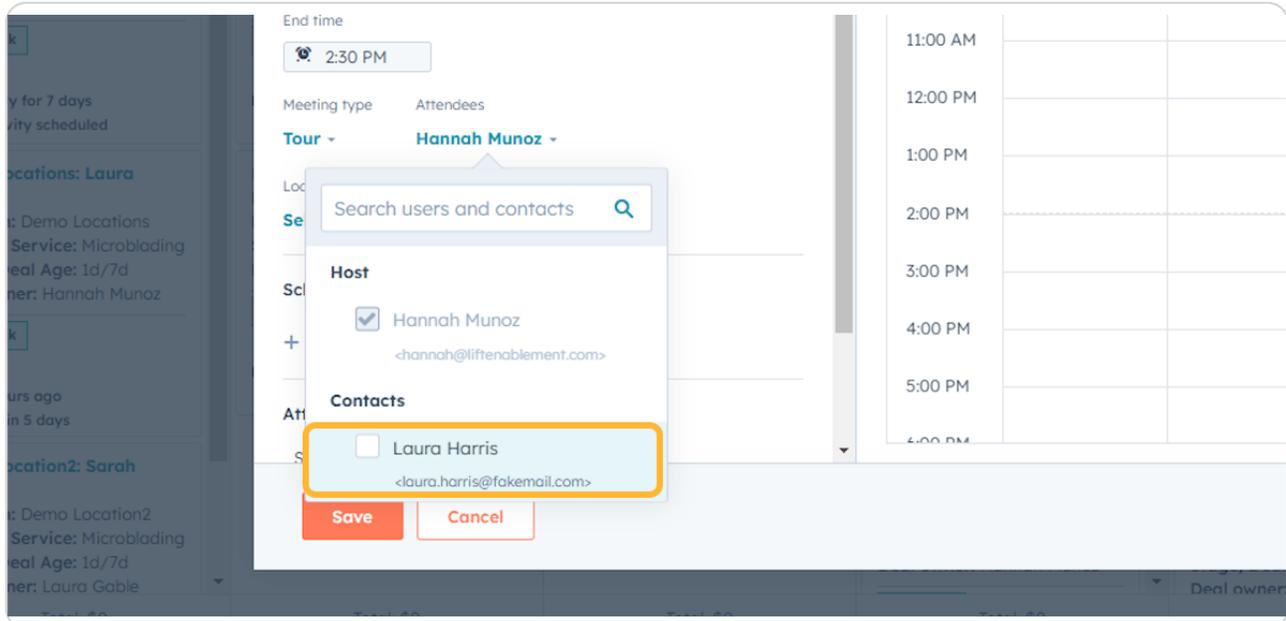
The Meeting type options include: Tour, Virtual Tour, 15 Min Business Consult, and Discovery Call.

The screenshot displays a meeting scheduling interface. On the left, there is a sidebar with deal information, including 'Stage/Deal Age: 1d/7d', 'Deal owner: Laura Gable', and 'Demo Locations: Laura Harris'. The main area shows a meeting scheduled for '01/17/2025' at '2:00 PM'. The 'Meeting type' dropdown menu is open, showing four options: 'Tour' (highlighted with an orange border), 'Virtual Tour', '15 Min Business Consult', and 'Discovery Call'. The 'Attendees' field shows 'Hannah Munoz'. Below the dropdown, there is an 'Attendee description' field with the placeholder text 'Send a description to your attendees'. At the bottom, there are 'Save' and 'Cancel' buttons. On the right side, a calendar grid shows the time slots from 10:00 AM to 6:00 PM, with a dashed line indicating the current meeting time at 2:00 PM.

## STEP 13

### Make sure the Pro is added to the Tour by selecting them manually from the Contact list

Note: If there are other attendees that you don't see on the initial screen, you can search for them.



## STEP 14

### Select a Location

Note: Options for Location include: Phone call, In-person, and Custom

The screenshot shows a meeting creation interface. At the top, the date is 01/17/2025 and the start time is 2:00 PM. The end time is set to 2:30 PM. The meeting type is 'Tour'. The 'Location' dropdown menu is open, showing options: 'Phone call' (with subtext 'Have your attendee call you'), 'In-person' (highlighted with an orange border and subtext 'Set an address'), and 'Custom' (with subtext 'Set customized location details'). Below the location menu, there is a 'Zoom' option with a note 'Zoom is disconnected. Reconnect integration'. At the bottom, there are 'Save' and 'Cancel' buttons.

## STEP 15

### Add in any additional information for the Location

In this case, add the Address for the In-Person tour.

The screenshot shows the same meeting creation interface. The 'Address' field is now filled with '34 Main St.' and is highlighted with an orange border. The 'Start time' is still 2:00 PM. To the right, a calendar grid shows the meeting scheduled for Thursday, January 16th, at 2:00 PM. The grid columns are labeled MON 13, TUE 14, WED 15, and THU 16. The time slots range from 9:00 AM to 4:00 PM.

## STEP 16

### Add or delete Scheduled reminder emails

You can add reminder emails to go out for the tour to the Pro. You can also delete any reminders you don't need.

The screenshot displays a software interface for managing a meeting. On the left, a sidebar lists attendees: Laura Gable and Hannah Munoz. The main area shows meeting details: Meeting type is 'Attendees', Location is '1234 Main St.', and there are '2 attendees'. A 'Scheduled reminder email' panel is highlighted with a yellow border, containing a dropdown set to '3 days before' and an 'Add reminder' button. Below this panel is an 'Attendee description' section with a text input field and an 'Add internal note' button. On the right, a calendar grid shows time slots from 9:00 AM to 6:00 PM.

## STEP 17

### Include an Attendee description

This description will appear in the meeting invite to the Pro.

The screenshot shows a CRM interface with a sidebar on the left containing contact information for 'Laura' and 'Sarah'. The main panel is titled 'Scheduled reminder email' and includes a dropdown set to '3 days before' and a '+ Add reminder' button. Below this is a checkbox for 'Include the attendee description in the reminder email body'. The 'Attendee description' field is highlighted with an orange border and contains the text 'Send a description to the Pro...'. Below the field is a rich text editor with options for Bold (B), Italic (I), Underline (U), Text color (T), and More, along with icons for link and image. A note indicates 'Associated with 2 records'. At the bottom are 'Save' and 'Cancel' buttons. On the right, a calendar grid shows times from 11:00 AM to 6:00 PM.

## STEP 18

### (Optional) Add an internal note to the meeting

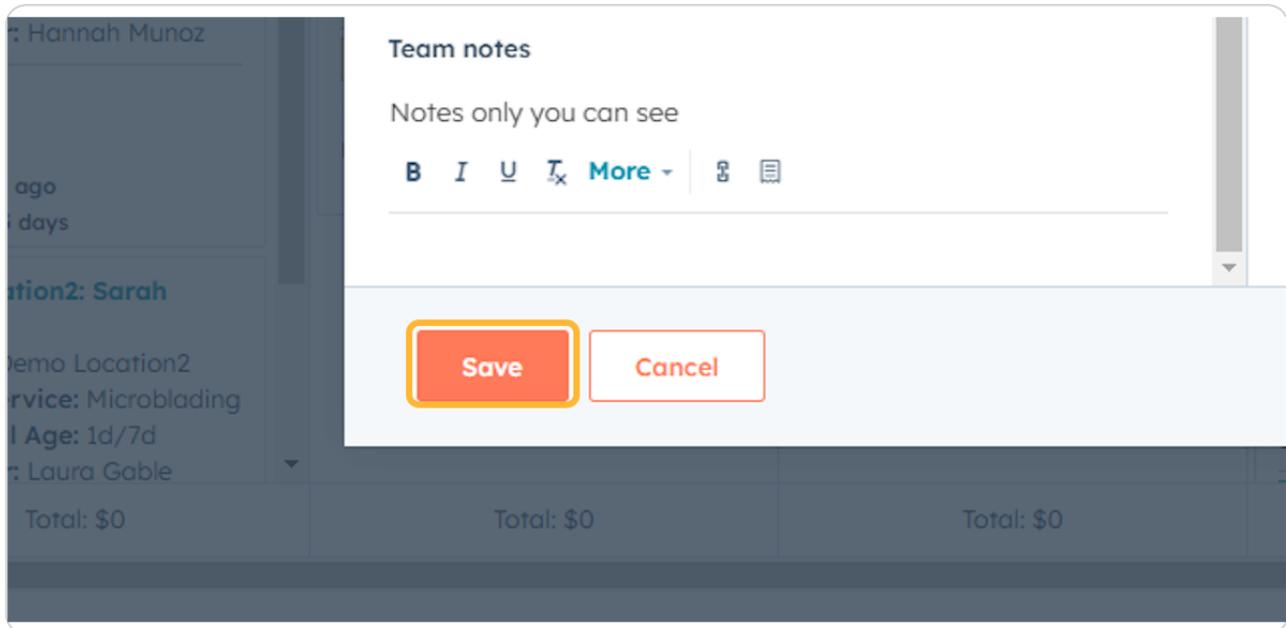
This note will only be seen by you or others on the team who will be on the Tour.

The screenshot shows the same CRM interface as in Step 17, but with the 'Attendee description' field now empty. The 'Team notes' field is highlighted with an orange border and contains the text 'Notes only you can see'. Below this field is a rich text editor with options for Bold (B), Italic (I), Underline (U), Text color (T), and More, along with icons for link and image. The 'Save' and 'Cancel' buttons remain at the bottom. The calendar grid on the right is also visible.

## STEP 19

### Click on Save

Note: Once you click Save, an invite will automatically be sent to the Pro. When you schedule a Tour, the Deal will automatically update to the Stage: Tour Scheduled. The Tour information from the meeting will automatically be updated on the Deal Section: Tour Info.



The screenshot shows a software interface with a 'Team notes' section. The notes area contains the text 'Notes only you can see' and a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Link (T), and a 'More' dropdown menu. Below the notes area, there are two buttons: 'Save' (highlighted with a yellow border) and 'Cancel'. The interface also shows a sidebar on the left with user information and a table at the bottom with columns labeled 'Total: \$0'.

## # View the Tour in the Deal

4 Steps

## STEP 20

### Click on View Record in the Deal preview

No activity for 6 days  
! No activity scheduled

**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

Total: \$0

Tour Date: 📅 [Schedule Now](#)

Toured Sola? -

Deal Owner: **Hannah Munoz**

[Need help? Click here.](#)

Powered by **Sola Salon's Deal Cards** ⓘ

Deal Discovery

Save Cancel **View record**

## STEP 21

### Click on the Activities tab in the center of the Deal Record

Activities

**Highlights**

DEAL TAGS	DEAL STATUS	DEAL ORIGIN	CREATE DATE
<a href="#">On-Track</a>	Open	Manual/Hubspot	01/10/2025 12:04 PM HST (6 day...)

**Details**

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 22

### Your Tour will show up in the Activities

The screenshot shows the Salesforce HubSpot interface for a deal record. The deal is titled "Demo Locations: Laura Harris" and is in the "New" stage of the "Leasing Pipeline". The "Activities" tab is selected, showing a list of activities. A meeting activity titled "Meeting - Tour with Laura hosted by Hannah Munoz" is highlighted with an orange box. The right sidebar shows contact details for Laura Harris and associated locations.

Activity	Due Date
Task assigned to Hannah Munoz	Jan 22, 2025 at 5:00 PM HST
Task assigned to Hannah Munoz	Jan 22, 2025 at 5:00 PM HST
Task assigned to Hannah Munoz	Jan 22, 2025 at 5:00 PM HST
Meeting - Tour with Laura hosted by Hannah Munoz	Jan 17, 2025 at 2:00 PM HST
Note by Hannah Munoz	Jan 17, 2025 at 7:01 AM HST
Logged call - Connected by Hannah Munoz	Jan 17, 2025 at 7:01 AM HST

## STEP 23

### If you click on the Tour name, you'll be able to see the information about the upcoming Tour

The screenshot shows the details of a meeting titled "Meeting - Tour with Laura hosted by Hannah Munoz". The meeting is scheduled for January 17, 2025, at 2:00 PM HST. The details include the organizer (Hannah Munoz), attendee description, meeting type (Tour), outcome (Scheduled), attendees (2 attendees), and duration (30 Minutes).

Meeting type	Outcome	Attendees	Duration
Tour	Scheduled	2 attendees	30 Minutes

