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 <u>View most recent version</u>

Created by

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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





You'll be taken to the Deals index page

| २, Search H | HubSpot | | |) | | | | | | | ୍ କ ଡ ବ 🗘 | 🌵 Sola Salon S |
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| Deals | ÷ * | | | | | | | | | | Actions + | Import Create d |
| All dec | als | | X My deals | | + A | d view (2/5 | 0) All Views | | | | | |
| ≡ ⊞ | Leasing Pipeline | * Deal owner + | Create date - | Last activity date - Close do | ate - (1) Test Record | · × + | More Clear quick filters | ≡ Advi | anced filters | | | m 9 |
| Searc | ch name or descriptio | 2 | | | | | | | | | Create report | Board options |
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| Primo Deal (| tion: Demo Locations ary Service: Microblading owner: Hannah Munaz | Demo Location2: Sar Location: Demo Locat | ah Brown tion2 | CRM Demo: David Doe Location: CRM Demo Primary Service: Skincare Stage/Deal Age: 6d/6d | Demo Location2: Sara Moore Location: Demo Locat Primary Service: Brow | h on2 | Demo Location2: Robert Harris | L F | ocation: Demo Locations Primary Service: Botox/Fillers Stage/Deal Age: 6d/6d | L | Primary Service: Permanent Makeup Stage/Deal Age: 6d/0d | Deal owner: A |
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| | Total: \$0 | Total: \$0 | | Total: \$0 | Total: \$0 | | Total: \$0 | | Total: \$0 | | Total: \$0 | To |

STEP 3

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

| Д | Degle - | | |
|----|-----------------------|--------------------------|--------------------|
| _ | Deals * | | |
| 00 | All deals | × | My deals |
| 66 | Leasing Pipeline | T Dod owner z Cree | ato dato - Last ac |
| 2 | | Dedrowner | |
| | demo | × | |
| 4 | NEW | | |
| e | NEW | CONNECTING | 2 CONNECTED |
| _ | Demo Locations: James | Demo Locations: John D | avis CRM Den |
| ف | Harris | Location: Demo Location: | s Location: |



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

| Search HubSpot | Ctrl K | +) | | | | Demo Locations: Laura Harris |
|--|---|--|---|---|--|---|
| Deals + | N. Hudel | | t titure a | | | Act |
| All deals Image: Image in the second secon | X My deal Deal owner * Create date * | Last activity date - Close date - | (1) Test Record - × + | All Views | Advanced filters | Demo Locations: Laura Harris Amount: Close Date: MH/DD/YYYY Stogs: New -: Datase Locate Microline |
| NEW 3 C | CONNECTIVE 2 C Dense Locations: John Davis Location: Chen Locations Primary Services: Permanent Makeup Stage: Deal Age: 60/66 Beel owner: Cyckin Taylor Stage: Deal Age: 60/66 Beel owner: Cyckin Taylor The activity scheduled Dense Locations: Sarah Brown Location: Denna Locations Stage: Deal Age: 60/66 Deal owner: Law Gobie See | CONNECTED 2 C TO CONNECTED 2 C TO CRH Demo: Emily Harris Location: CRM Demo Primary Service: Other Stage/Deal Age: Sid/ad Deal owner: Hannah Hunoz On-Tracs Task 3 hours ago Primary Service: Sikincore Stage/Deal Age: Canadho Primary Service: Sikincore Stage/Deal Age: Canadho Deal owner: Ashiery Canadho Deal owner: Ashiery Canadho | URISCHEDULED • • • • • • • • • • • • • • • • • • • | TOUR COMPLETED 7 C | WATLIST 3 C CEM Demos Arona Johnson Lecation: CEM Demo Primary Service: Microbioling Stage/Cell Age: (d)/dl Deal owner: Laura Gable Singe/Cell Age: (d)/dl Deal owner: Laura Gable Demo Location: James Johnson Location: Demo Locations Primary Service: Bottoy/Files Stage/Deal Age: (d)/dl Deal owner: Laura Gable Demo Location: James Johnson Location: Demo Locations Demo Location: James Johnson Location: Demo Locations Demo Location: James Johnson Location: Laura Gable Demo Location: James Johnson Location: Laura Gable Demo Location: James Johnson Johnso | Pipeline: Leasing Pipeline Call Task Meeting Note Ernal Call Task Meeting * * * * * * * * * * * * * |
| Demo Location2: Sarah Smith Location: Demo Location2 Primary Sarvice: Microbioding Deal owner: Laura Gabie On-Track Con-Track | No octivity for 6 days 1 No octivity scheduled | ne scrivity scheduled N | e octivity for 6 days Na activity scheduled Activity Scheduled Activit | On-Track Construint for 6 days I No activity for 6 days I No activity scheduled Demo Location: Demo Locations Firmary Service: Lathes Strage/Deal Age: 63/64 Deal owner: I asm Schlie | Demo Locations: Jane Brown Location: Demo Locations Primary Service: Permanent Molecup Stage/Deal Age: 6d/6d Deal owner: Ashiey Carvalho No activity for 6 days 1 No activity for 6 days | Toured Sola? - Deal Owner: Hannah Munoz Reed help? Cli Powerst by Sola Salari's Deal Cards @ |



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





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

| ✓ Schedule | | *> | |
|------------|---|----|-----|
| | | | |
| | | | |
| | Calendar | | |
| | Connect your calendar to use HubSpot Meetings | | |
| | and calendar sync. | | |
| | Send meetings directly from HubSpot. | | 6 |
| | Log outgoing meetings automatically. | Q | M |
| | Sunc your calendar so contacts can schedule time | | |
| | with you. | | |
| | Requires calendar sync | | 1.1 |
| | See your HubSpot tasks in your calendar. | | |
| | Requires an additional step with task sync. Only available on | | |
| | Sales Starter and up plans. | | |
| | | | |
| | Connect your calendar La | | |
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7 of 17

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



STEP 9

Type in the Title of the Tour

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|---|----------|--------|--------|--------|--------|------|
| | | MON 13 | TUE 14 | WED 15 | THU 16 | |
| 2 | | | | | | |
| Start time | 9:00 AM | | | | | |
| 9. 2:00 PM | 10:00 AM | | | | | |
| | 11:00 AM | | | | | |
| Attendees | 12:00 PM | | | | | |
| pe - Hannah Munoz - | 1:00 PM | | | | | |
| | 2:00 PM | | | | | |
| | 3:00 PM | | | | | 2:00 |
| ler emails | 4:00 PM | | | | | |
| | 5.00 DM | | | | | |



STEP 10

Update the Start date

| : <nannan@iimenapiemen< th=""><th></th><th></th><th></th><th></th><th></th><th></th></nannan@iimenapiemen<> | | | | | | |
|---|------|----------|--------|--------|--------|--------|
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| Attendees | | 12:00 PM | | | | |
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| | | 4:00 PM | | | | |
| | | 5-00 DM | | | | |

STEP 11

Update the Start time

| tions: James | Tour with Laura | | | |
|-------------------------------------|-------------------------------|----|---------|------|
| emo Locations vice: Brows | Start date Start time | 9: | 00 AM | |
| Age: 1d/7d : Laura Gable | 01/17/2025 | 10 | 0:00 AM | |
| | End time 1:00 PM | 11 | 1:00 AM | |
| r 7 days | 1:30 PM | 12 | 2:00 PM | |
| scheduled | Select meeting type - 2:00 PM | 1: | 00 PM | |
| tions: Laura | Location 2:30 PM | | | |
| emo Locations vice: Microblading | Select location - 3:00 PM | 2: | 00 PM | |
| Age: 1d/7d Hannah Munoz | Scheduled reminder emails | 3: | 00 PM | |
| | + Add reminder | 4: | :00 PM | |
| ago davs | Attendee description | 5: | 00 PM | |
| | | ¥ | 00 DM | |



Select the Meeting type

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

| itage/Deal Age: 1d/7d Deal owner: Laura Gable | ➡ 01/17/2025 ♥ 2:00 PM | 10:00 AM |
|--|--|----------|
| On-Track | End time 2:30 PM | 11:00 AM |
| lo activity for 7 days | Meeting type Attendees | 12:00 PM |
| Demo Locations: Laura | Select meeting type - Hannah Munoz - | 1:00 PM |
| tarris .ocation: Demo Locations | Tour | 2:00 PM |
| Primary Service: Microblading | Virtual Tour | 3:00 PM |
| On-Track | 15 Min Business Consult Discovery Call | 4:00 PM |
| lote 7 hours ago | Attendee description | 5:00 PM |
| ask due in 5 days | Send a description to your attendees | 4-00 DM |
| imith .ocation: Demo Location2 Primary Service: Microblading | Save | |



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.





Select a Location

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

| | © 01/17/2025 | 92:00 PM | 10:00 AM | |
|-----------|------------------------------|---|----------|--|
| | 2:30 PM Meeting type Atte | Phone call Have your attendee call you | РМ | |
| | Location | In-person Set an address | M | |
| ding | Select location - | Custom | 2M | |
|)Z | Scheduled reminde | Zoom | PM | |
| | + Add reminder | Zoom is disconnected. Reconnect integration | PM | |
| | Attendee description | o vour attendees | ¥-00 BM | |
| : ding | Save | ancel | | |

STEP 15

Add in any additional information for the Location

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

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|---|----------|--------|--------|--------|--------|------|
| | | MON 13 | TUE 14 | WED 15 | THU 16 | |
| Start time | 9:00 AM | | | | | |
| 2:00 PM | 10:00 AM | | | | | |
|] | 11:00 AM | | | | | |
| ttendees | 12:00 PM | | | | | |
| attendees + | 1:00 PM | | | | | |
| dress 34 Main St. | 2:00 PM | | | | | 2:00 |
| der emails | 3:00 PM | | | | | |
| | 4:00 PM | | | | | |
| | 5 00 DV | | | | | |



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.



Include an Attendee description

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

| ty for 7 days | Scheduled reminder email 3 days before | Ū | 11:00 AM 12:00 PM | |
|--|--|----------------------------|----------------------|-------------|
| ocations: Laura | + Add reminder | | 1:00 PM | |
| n: Demo Locations Service: Microblading | Include the attendee description in | the reminder email body | 2:00 PM | |
| Deal Age: 1d/7d mer: Hannah Munoz | Attendee description | | 3:00 PM | |
| k | Send a description to the Pro B I U T ₂ More - S II | | 4:00 PM | |
| burs ago in 5 days | A | ssociated with 2 records - | 5:00 PM | |
| ocation2: Sarah | + Add internal note | • | 4:00 DM | |
| n: Demo Location2 r Service: Microblading Deal Age: 1d/7d rep:/ Laura Gable | Save | | _ | - Teglowner |
| Total: \$0 | Total: \$0 | Total: \$0 | Total: \$0 | Dearowner |

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.





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.

| : Hannah Munoz | Team notes | |
|--|------------------------|------------|
| | Notes only you can see | |
| ago days | B I ⊻ ¼ More - ≌ [| |
| tion2: Sarah | | • |
| emo Location2 rvice: Microblading I Age: 1d/7d | Save Cancel | |
| : Laura Gable | | |
| Total: \$0 | Total: \$0 | Total: \$0 |
| | | |

View the Tour in the Deal

4 Steps



Click on View Record in the Deal preview



STEP 21

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

| 📍 Hiahliahts | | | |
|--|--|--|--|
| , <u>j</u> | | | |
| DEAL TAGS | DEAL STATUS | DEAL ORIGIN | CREATE DATE |
| On-Track | Open | Manual/Hubspot | 01/10/2025 12:04 PM HST (6 day |
| | | | |
| | | | |
| | | | |
| | | | |
| 💎 Details | | | |
| S Details | Dani pama | Bhone Number | Empil Address |
| S Details | Deal name | Phone Number | Emoil Address |
| Details Location Demo Locations | Deal name Demo Locations: Laura Harris | Phone Number 1-739-240-6917 | Email Address laura.harris@fakemail.com |
| Details Location Demo Locations Deal Details | Deal name Demo Locations: Laura Harris Lead Channel Type | Phone Number 1-739-240-6917 | Email Address laura.harris@fakemail.com |
| Details Location Demo Locations Deal Origin Manual /Huberot | Deal name Demo Locations: Laura Harris Lead Channel Type Outbound | Phone Number 1-739-240-6917 Lead Channel Web Search | Emoil Address laura.harris@fakemail.com Channel Group (B) 8 |
| Details Location Demo Locations Deal Origin Manual/Hubspot | Deal name Demo Locations: Laura Harris Lead Channel Type Outbound 👻 | Phone Number 1-739-240-6917 Lead Channel Web Search 👻 | Email Address laura.harris@fakemail.com Channel Group (B) 6 |



Your Tour will show up in the Activities

| 3 | Q. Search HubSpot | | 彩 🗟 ⑦ ⑧ 🚅 🥠 Sola Salon Studios 🕶 |
|-------------|---|--|--|
| П — | < Deals Actions - | Contomize record Overview Activities O Lead Source O Settings | >> It Contacts (1) + Add |
| \$ 8 | Demo Locations: Laura Harris Amount Close Date: MHA/DD/YYYY Stoge. New - Pipeline: Leasing Pipeline | Search activities Q. Collapse all Activity Notes Emolis Calls Tasks Meetings | Caura harris & & |
| e | Image: Note Email Call Task Meeting More | Filter by: Filter activity (14/22) + All users - All teams - Upcoming | ✓ ▲ Location (1) + Add Demo Locations |
| Å | Details Actions - Deal Tags | Task assigned to Hannah Nunaz Due: Jan 22, 2025 et 5:00 PH HST Follow up on Demo Locations: Loura Hantis | Leasing Manager: 🖷 View associated Location |
| 8 | on-Track Deol Origin Manual/Hubspot - | > Task assigned to Hannah Munaz Ø Due: Jan 22, 2023 or 5500 PM HST Ø Follow up on Demo Locations: Loura Hanris | Salesmsg SMS (0) |
| □ - + | Loation Demo Locations Deal nome Demo Locations: Laura Harris | Task assigned to Hannah Munaz Due: Jan 22, 2025 of 500 PH HST Task | Send SMS |
| Ð | Phone Number 1-730-240-6017 | January 2025 | Y Contact's Recent Deals |
| | Email Address Ioura.harris@fakemail.com | Meeting - Tour with Loura hosted by Hannah Munaz Jan 17, 2029 or 200 PH HsT Send a description to the Pro | No recent deals for contact |
| | Lead Channel Type Urbound Lead Channel Web Search | Note by Hannah Munaz Jun 12,2025 of 701.4M H8T type in information here | contact. |
| ۲ | Original Institut Source Offline sources - Deol owner | Logged coll - Connected by Hannah Munoz Jan 12, 2025 of 701 AM HST Log information about what was discussed on the coll. | |
| | Hannah Munoz 👻 | | |

STEP 23

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

| with Laura He | arris | iostea by Hanno | n munoz | ACTIONS + | Jan 17, 2025 af 2:00 PM H |
|-----------------|-------------------|-----------------|------------|-----------|---------------------------|
| Organized by | Hannah Munoz | 1 | | | |
| Attendee descri | iption | | | | |
| Send a descr | iption to the Pro |) | | | |
| Meeting type | Outcome | Attendees | Duration | | |
| Tour | Scheduled | 2 attendees | 30 Minutes | | |
| Team notes | | | | | |
| Notes only yo | ou can see | | | | |
| 🗭 Add comn | nent | | | | 2 associations |
| | | | | | |



