

# Sola Salon Studios - A Day in the Life of Utilizing HubSpot's Mobile App

HubSpot's mobile app is great for when you are on the go and aren't going to be around your computer. This guide walks through a day in the lift of using the mobile app. You'll see how you can navigate to Deals, add and update your Deals, and how to access other pipelines and dashboards.

72 Steps [View most recent version](#) 

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Created by

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Creation Date

Jan 14, 2025

Last Updated

Aug 06, 2025

# # Open up the HubSpot Mobile App and Navigate to... 7 Steps

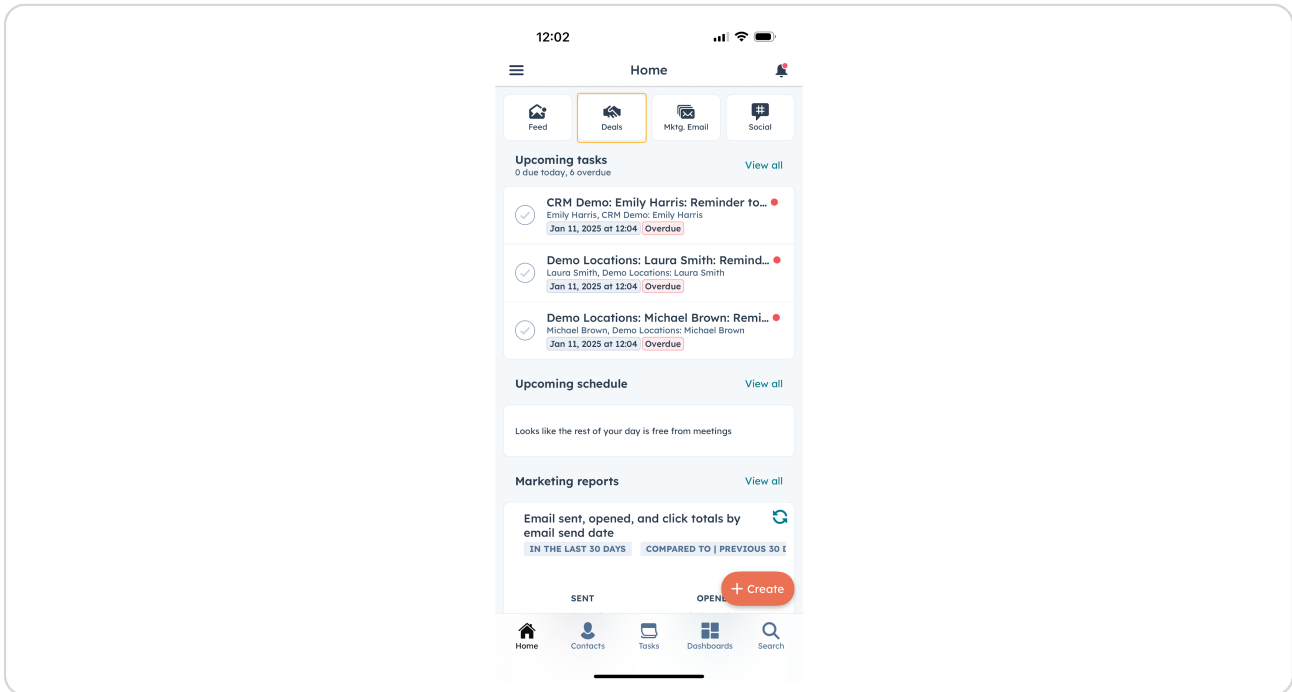
Note: Make sure you have downloaded the HubSpot app to your phone.

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## STEP 1

### Welcome to the Home Screen! Let's navigate to Deals

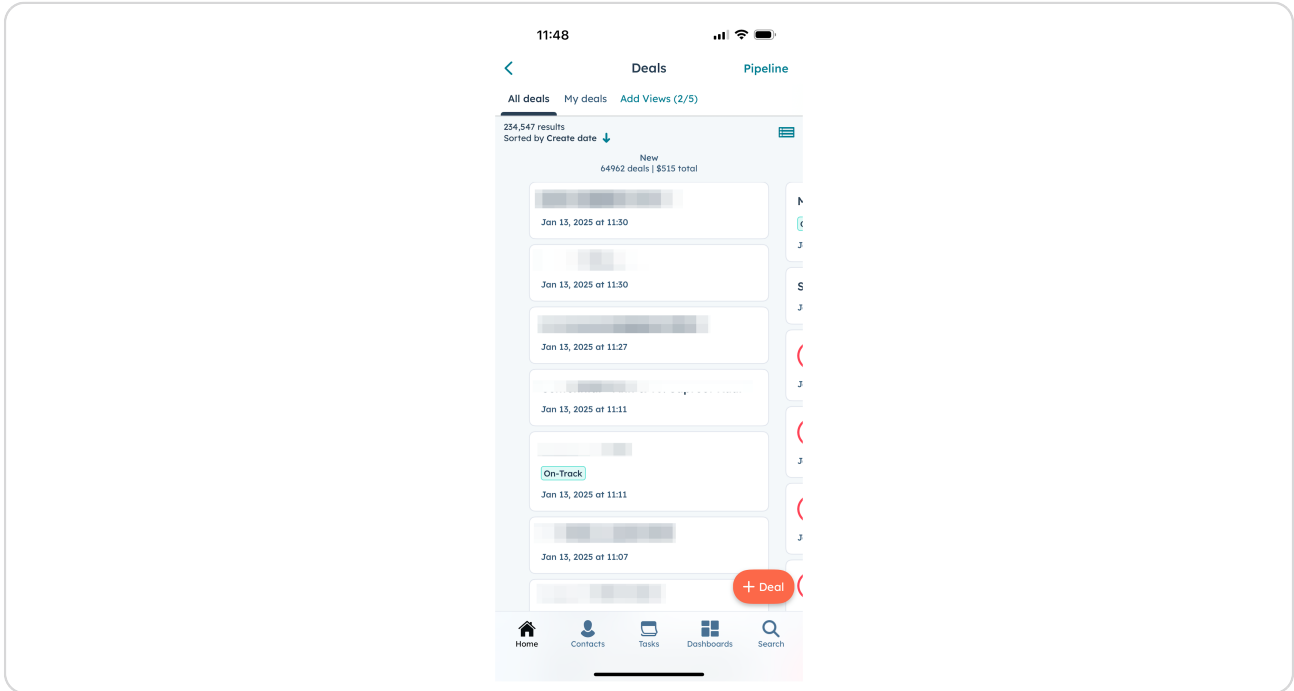
Note: On the Home Screen, you can click the Deals button. Everywhere else in the app you will want to use the hamburger menu at the top left-hand corner of the screen.



## STEP 2

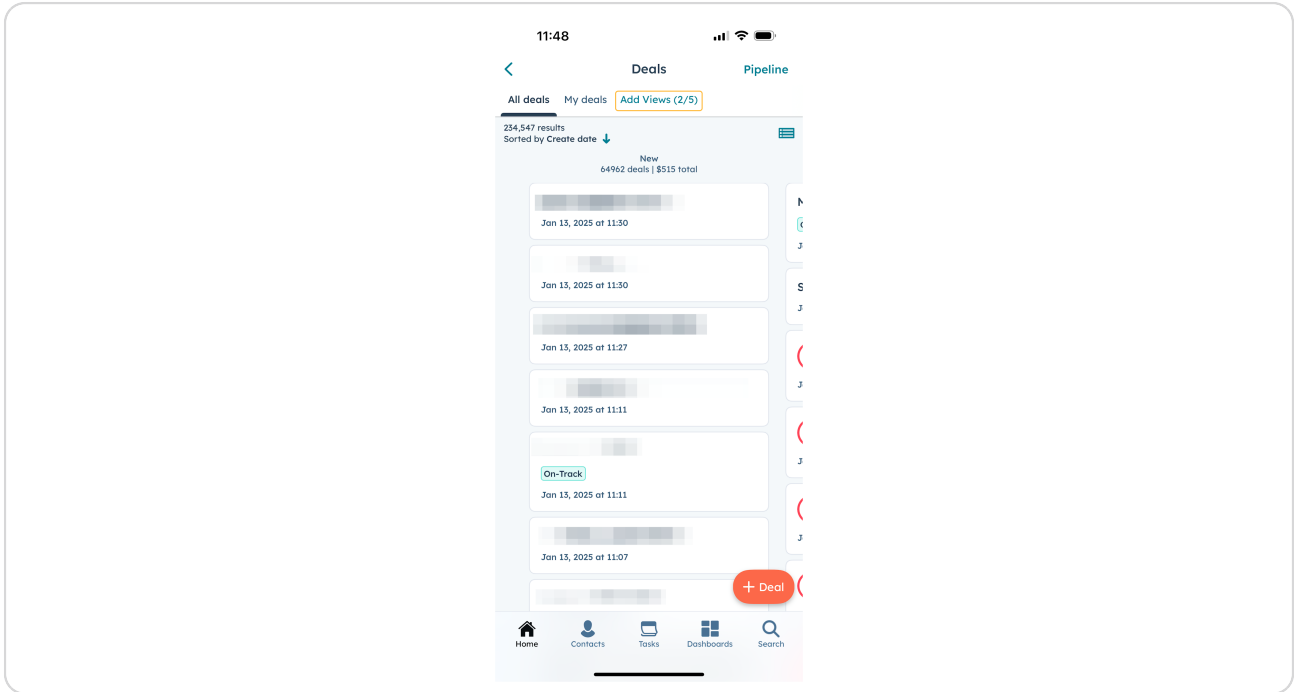
### You'll be taken to the Deal Overview

Deal Names have been blurred for confidentiality reasons.



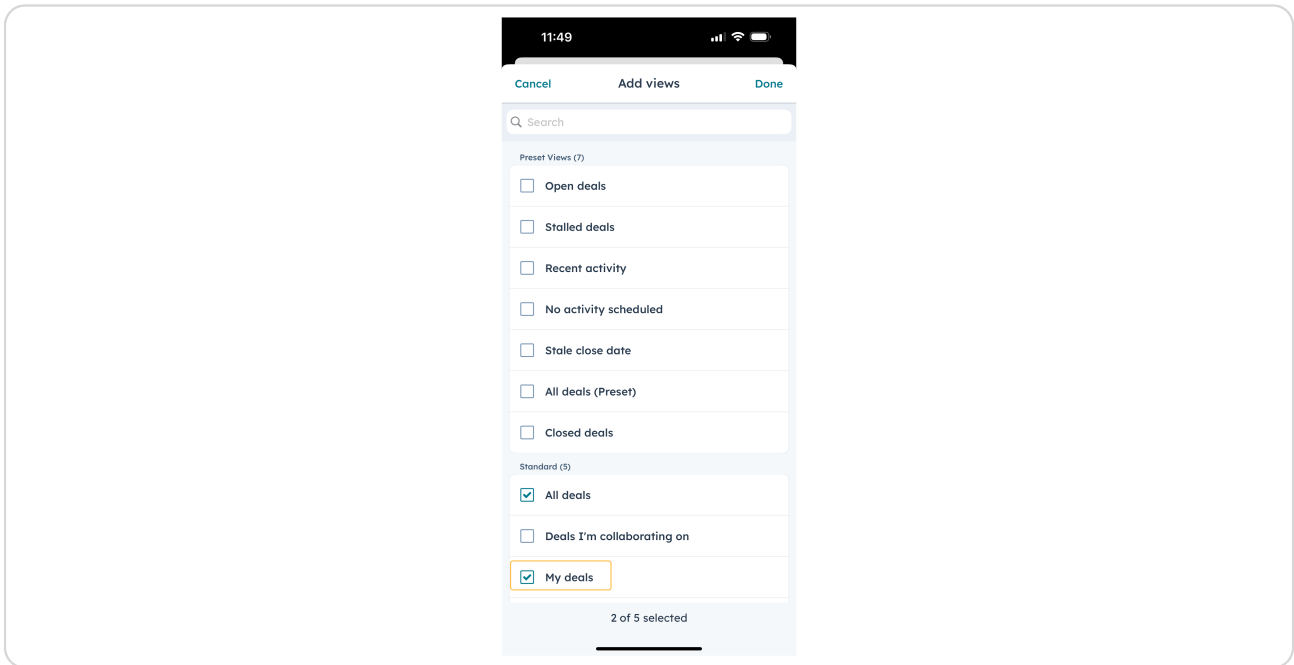
### STEP 3

It can be challenging to find your specific Deals. Let's filter by your Deals. Click **Add Views**



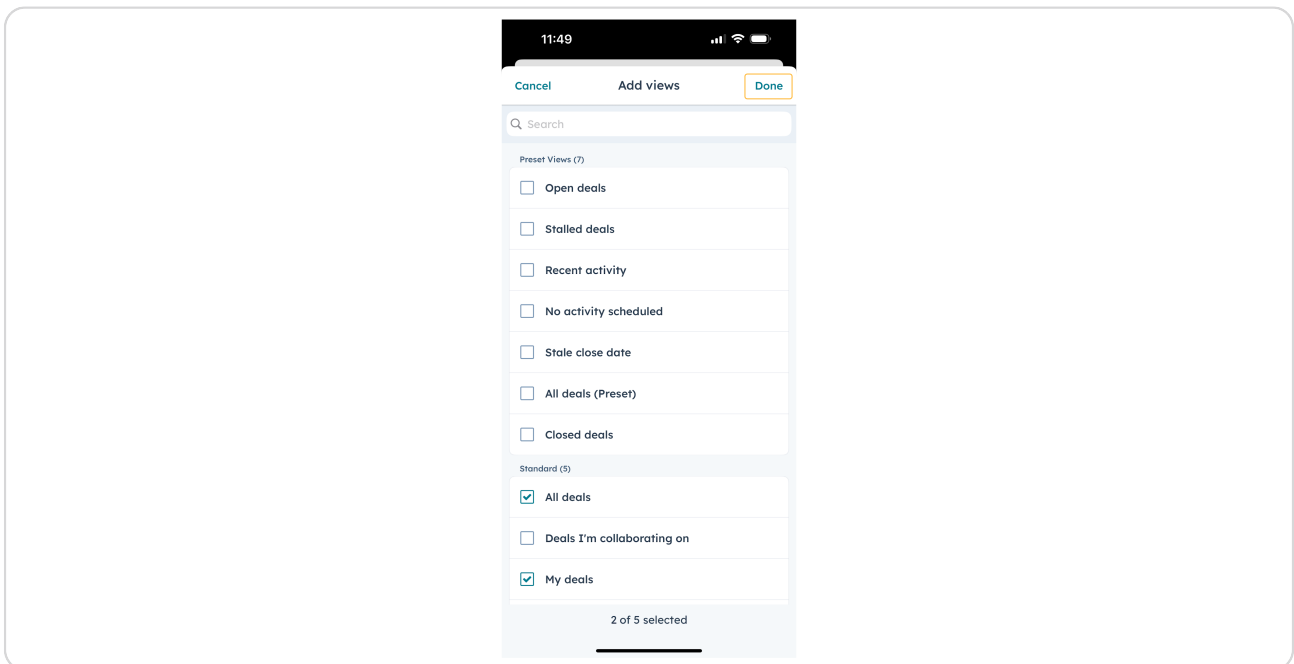
## STEP 4

### Check My deals



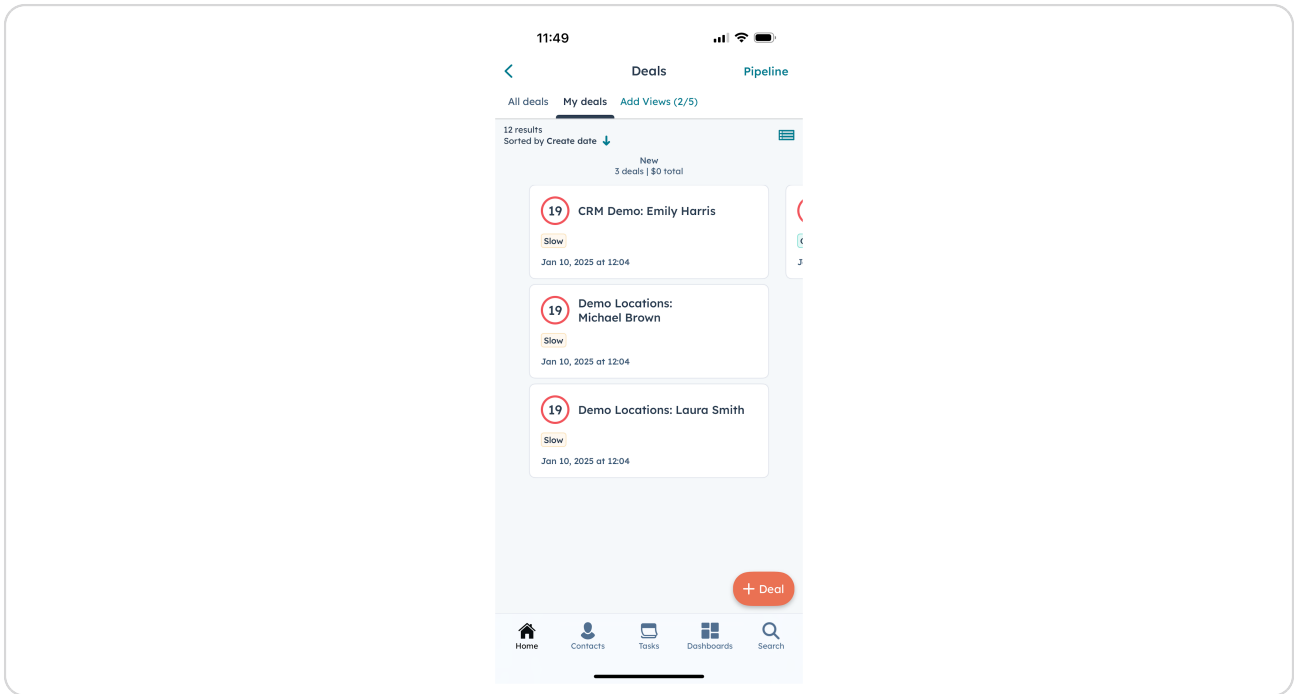
## STEP 5

### Click Done



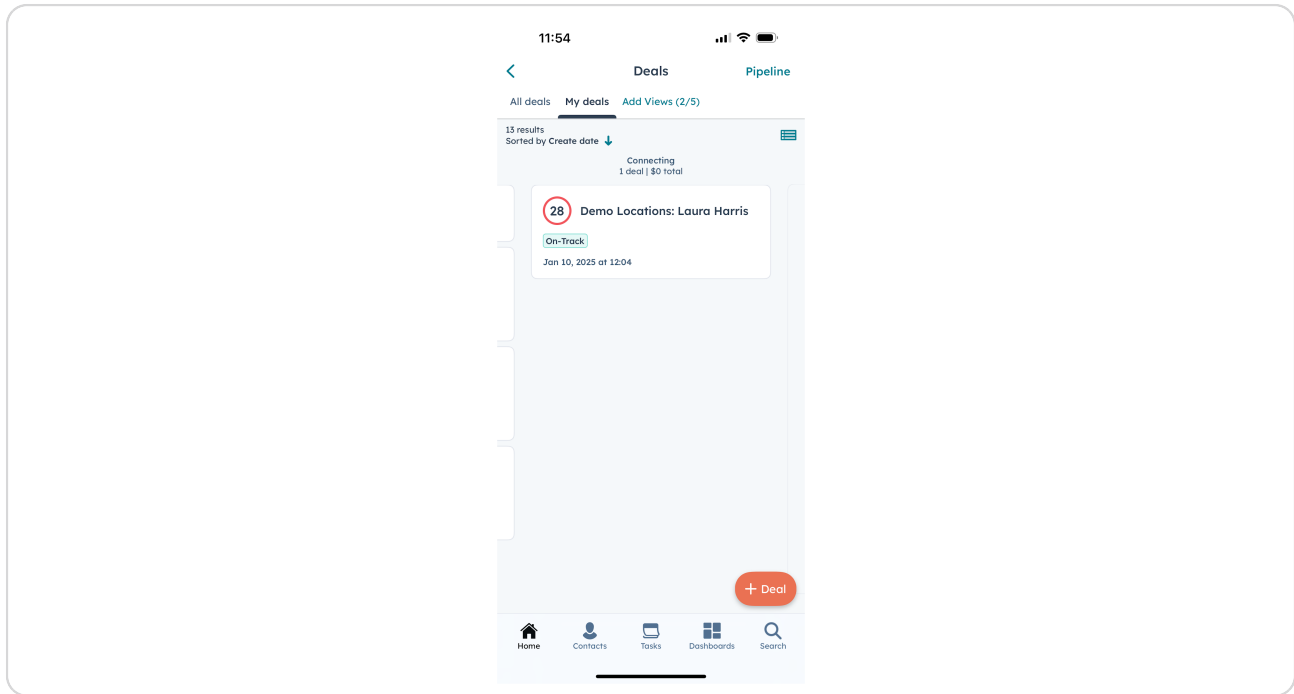
## STEP 6

Now you'll see only Deals owned by you. This will make locating a specific deal easier



## STEP 7

**Note: On the kanban view, you can see Deals in other stages of the pipeline by swiping on the screen.**

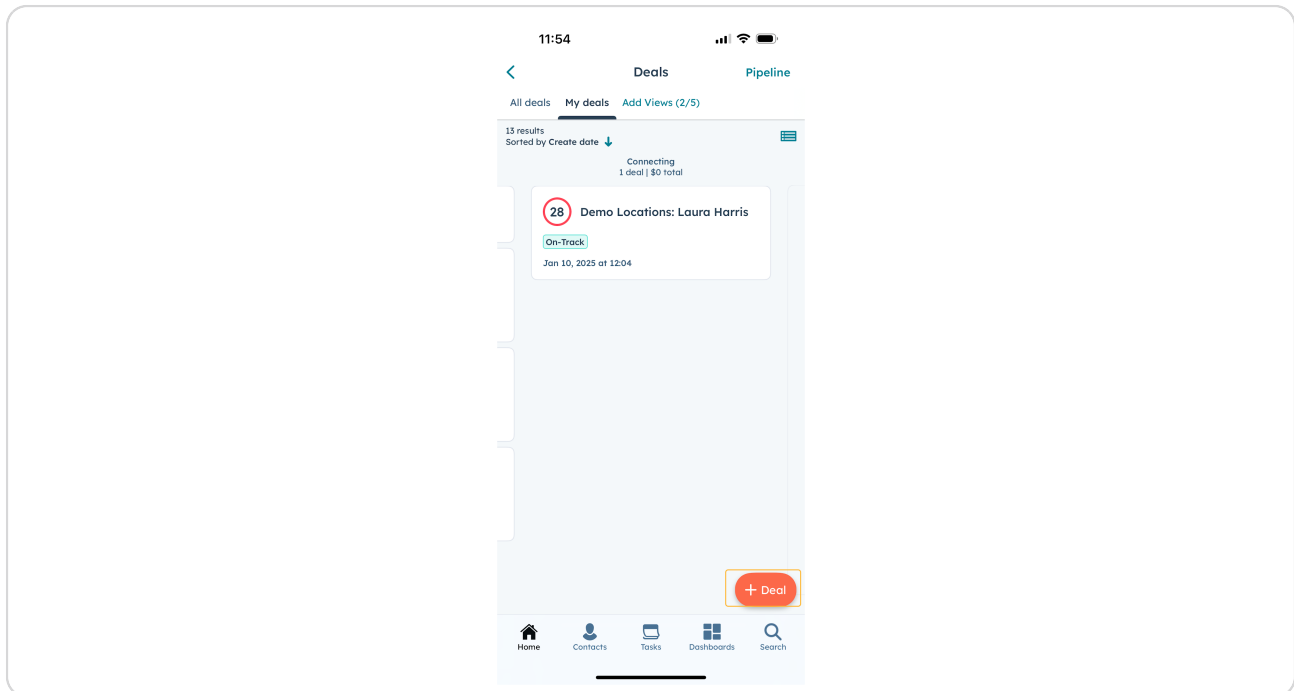


## # Adding Deals

8 Steps

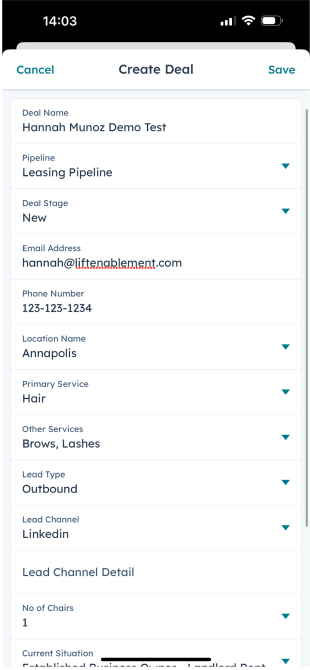
## STEP 8

If you are on the go and need to add a new Deal to HubSpot, Click +Deal



## STEP 9

A form will pop up. Include all information that you have available about the Deal. Any fields listed as Required need to be filled out to create a Deal.



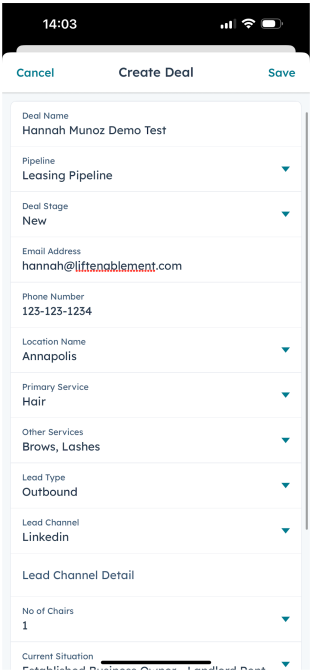
The screenshot shows a mobile application interface for creating a deal. At the top, there is a status bar with the time 14:03 and signal, Wi-Fi, and battery icons. Below the status bar is a navigation bar with three buttons: 'Cancel', 'Create Deal', and 'Save'. The main content area is a form with the following fields:

- Deal Name: Hannah Munoz Demo Test
- Pipeline: Leasing Pipeline (dropdown menu)
- Deal Stage: New (dropdown menu)
- Email Address: hannah@liftenablement.com
- Phone Number: 123-123-1234
- Location Name: Annapolis (dropdown menu)
- Primary Service: Hair (dropdown menu)
- Other Services: Brows, Lashes (dropdown menu)
- Lead Type: Outbound (dropdown menu)
- Lead Channel: LinkedIn (dropdown menu)
- Lead Channel Detail: (empty field)
- No of Chairs: 1 (dropdown menu)
- Current Situation: Established Business Owner - Lead/Deal (dropdown menu)

## STEP 10

To associate a location with the deal, make sure you Click on the Location dropdown and choose the proper Location Name.

Note: There may be locations with the same name. If that is the case, there will be parentheses with the state mentioned so you pick the correct Location.

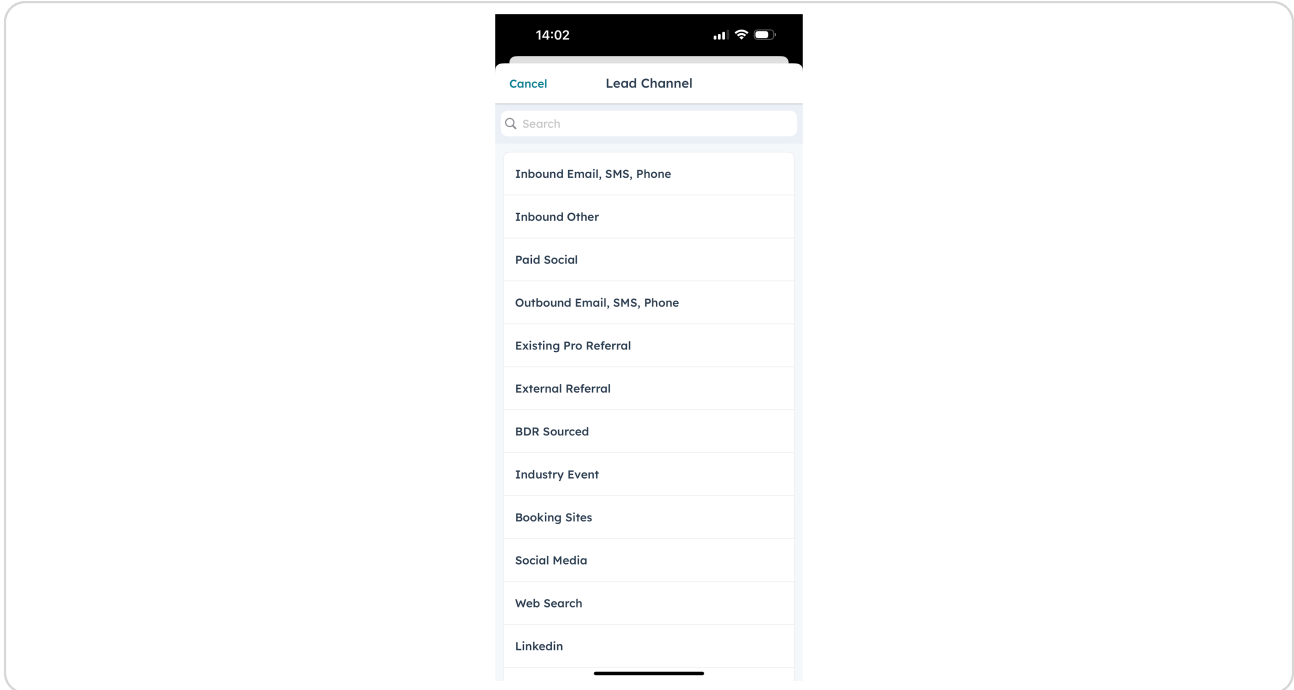


The screenshot shows a mobile application interface for creating a deal. The top bar displays the time 14:03 and signal, Wi-Fi, and battery icons. Below the bar are three buttons: 'Cancel', 'Create Deal', and 'Save'. The main form contains the following fields:

- Deal Name: Hannah Munoz Demo Test
- Pipeline: Leasing Pipeline
- Deal Stage: New
- Email Address: hannah@lifenoblement.com
- Phone Number: 125-125-1254
- Location Name: Annapolis
- Primary Service: Hair
- Other Services: Brows, Lashes
- Lead Type: Outbound
- Lead Channel: LinkedIn
- Lead Channel Detail: (empty)
- No of Chairs: 1
- Current Situation: (empty)

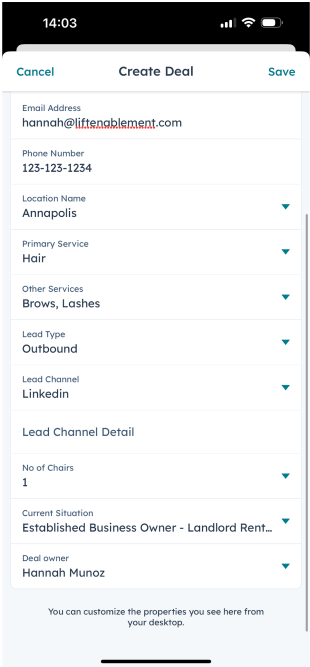
## STEP 11

When you are choosing a Lead Type and Lead Channel, the options will not sort like they do on the desktop. If you choose Lead Type as Inbound, the first 3 options in Lead Channel are the Inbound options you can choose from. The rest are Outbound options.



## STEP 12

Scroll down and include all information. When you are done Click Save



The screenshot shows a mobile application interface for creating a deal. At the top, there is a status bar with the time 14:03 and signal, Wi-Fi, and battery icons. Below the status bar is a navigation bar with three options: 'Cancel', 'Create Deal', and 'Save'. The main content area is a form with several fields, each with a dropdown arrow on the right side:

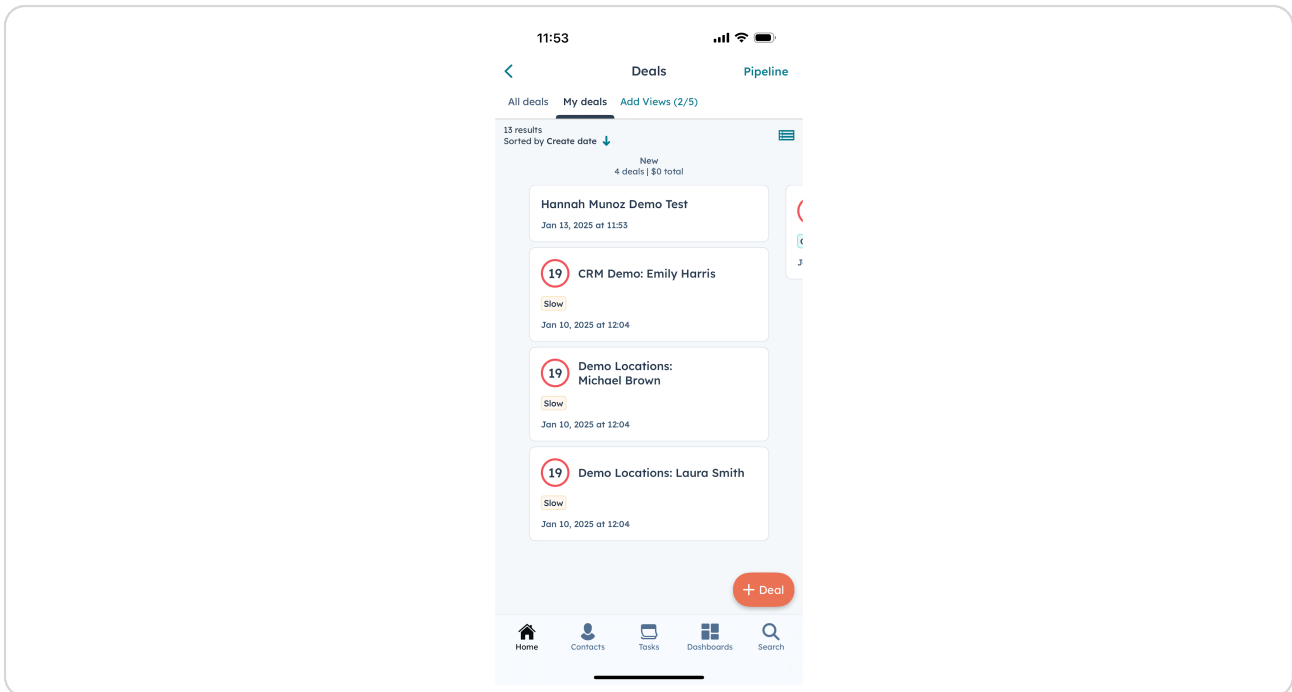
- Email Address: hannah@liftenablement.com
- Phone Number: 123-123-1234
- Location Name: Annapolis
- Primary Service: Hair
- Other Services: Brows, Lashes
- Lead Type: Outbound
- Lead Channel: LinkedIn
- Lead Channel Detail: (empty field)
- No of Chairs: 1
- Current Situation: Established Business Owner - Landlord Rent...
- Deal owner: Hannah Munoz

At the bottom of the form, there is a note: "You can customize the properties you see here from your desktop."

## STEP 13

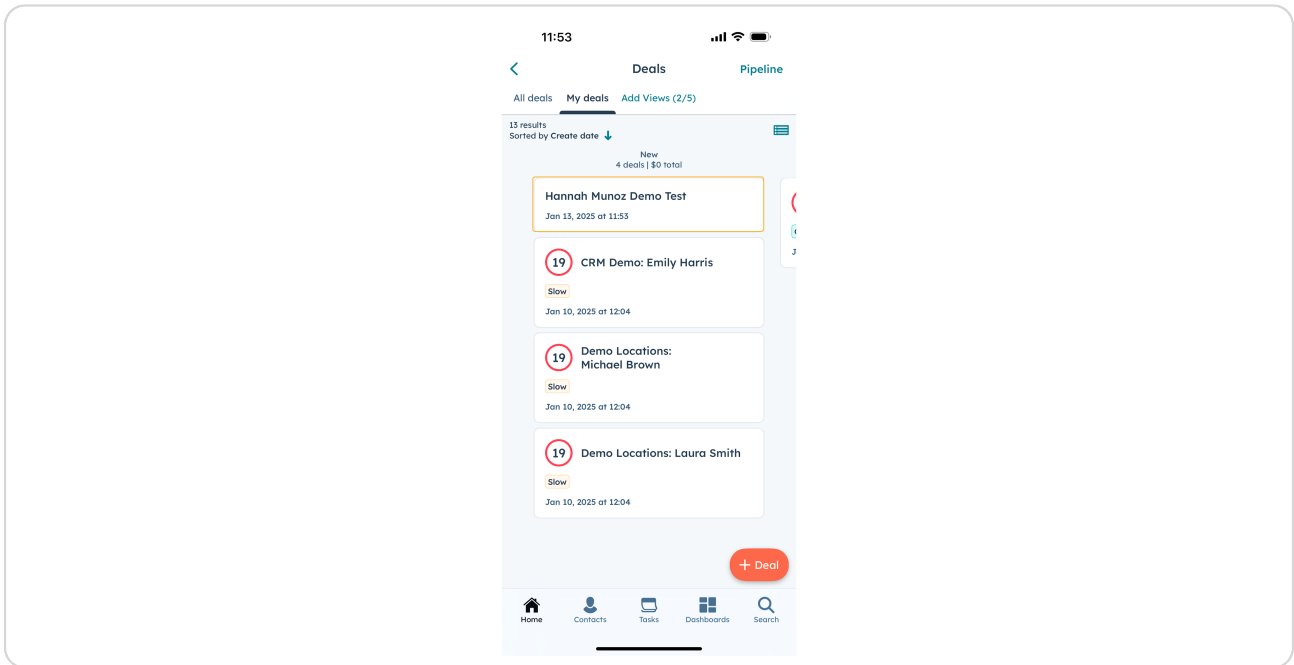
### A new Deal will be Created

Note: It may take a second for the Deal to register within HubSpot. Refreshing the screen will help the new Deal appear on your screen.



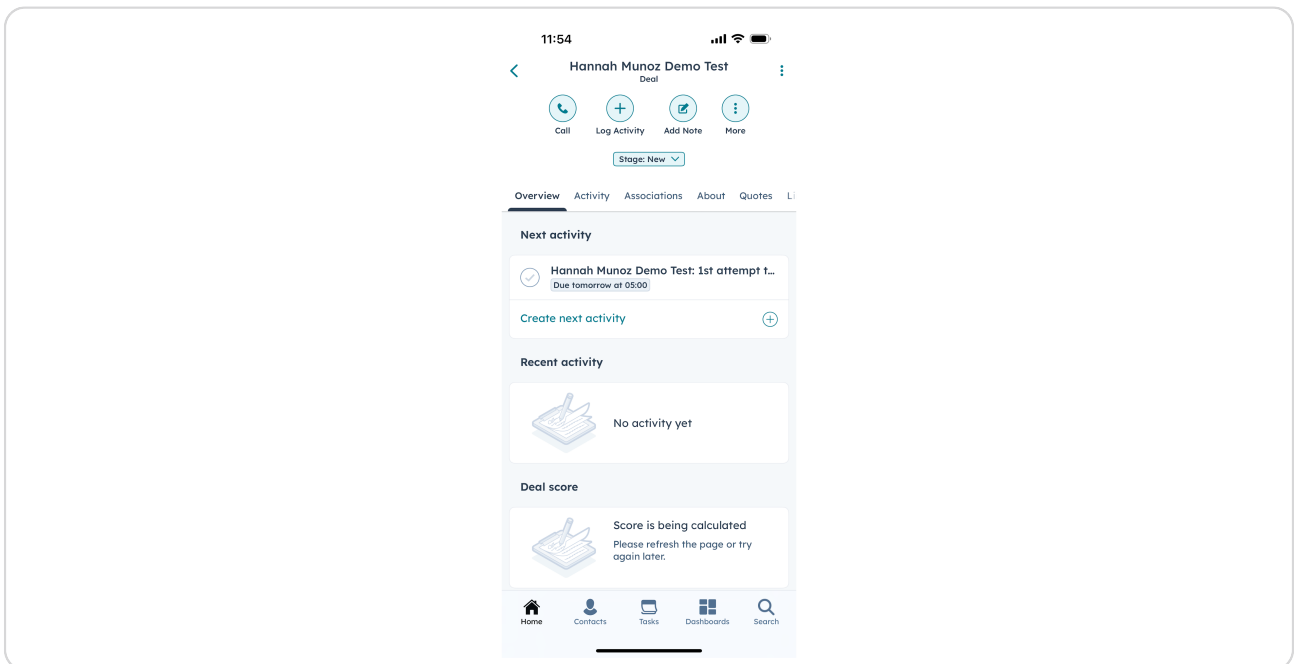
## STEP 14

### Click the New Deal



## STEP 15

### You can now update the Deal and work from within the Deal



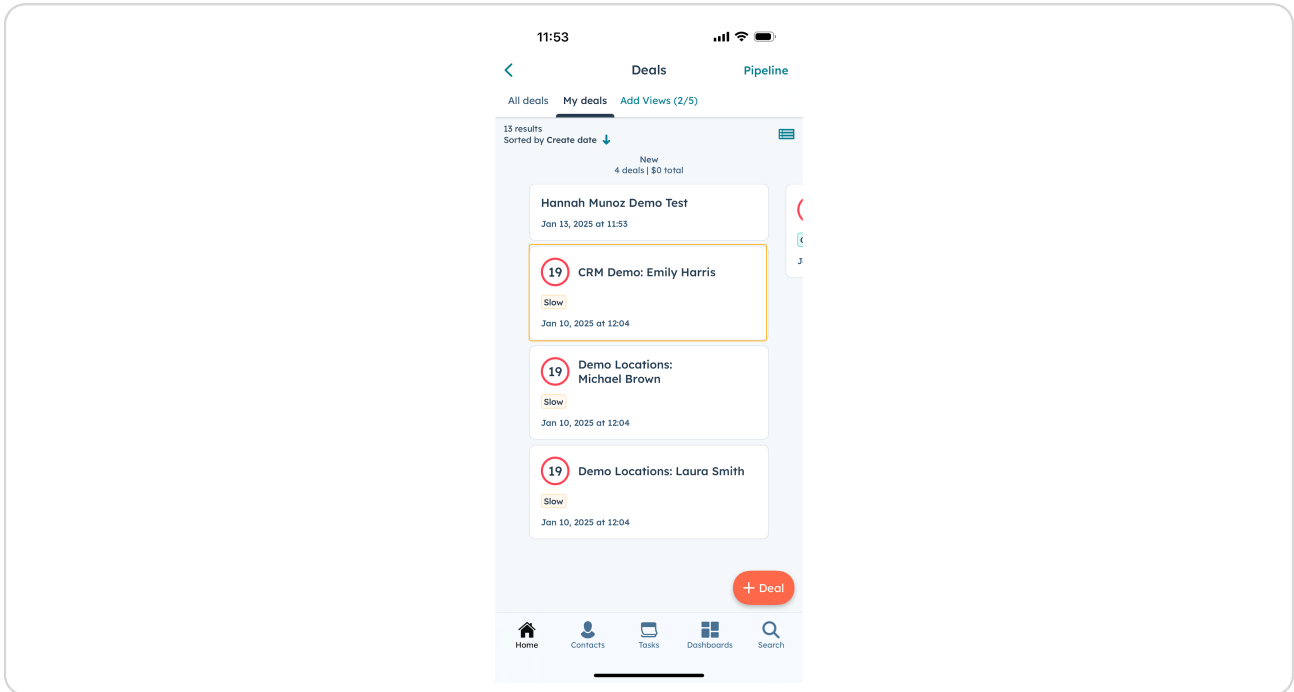
# # Updating Deals

26 Steps

As you're working on Deals it's important to make sure the information about a deal, including pipeline stage, is up to date. Let's walk through how to keep your Deals fresh on the go including logging notes, creating tasks, and even scheduling tours.

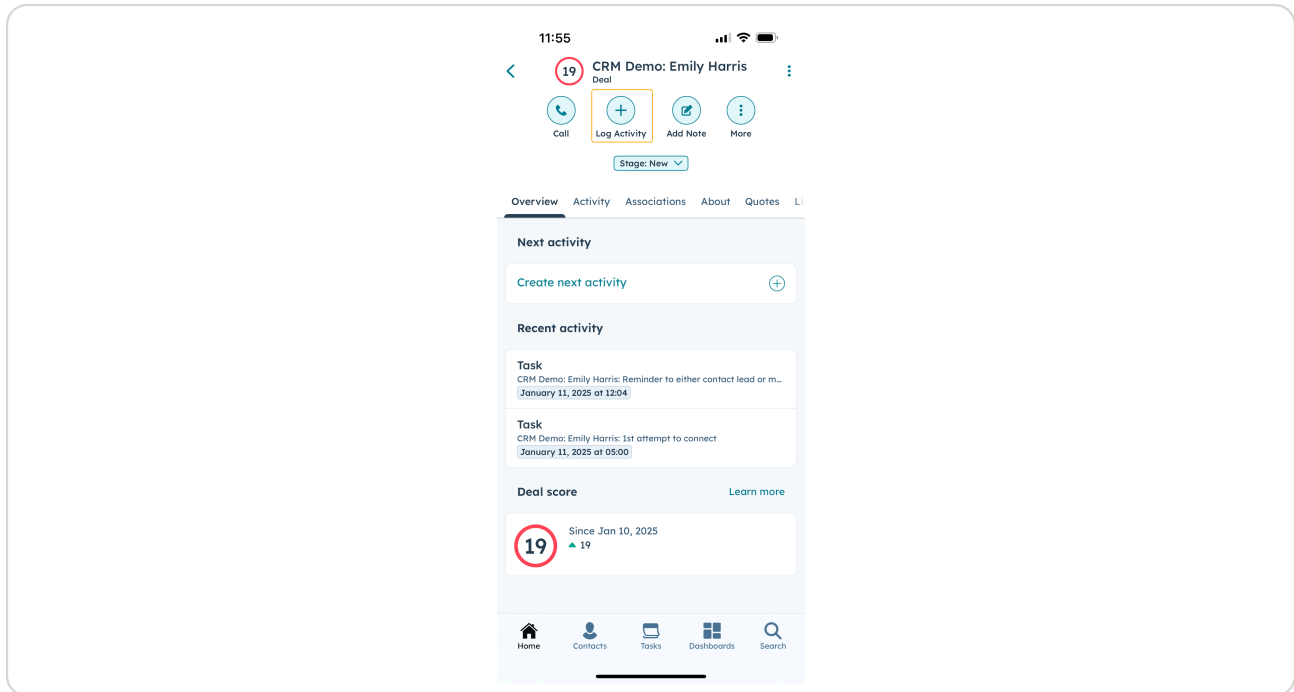
## STEP 16

### Click on the Deal you want to work on



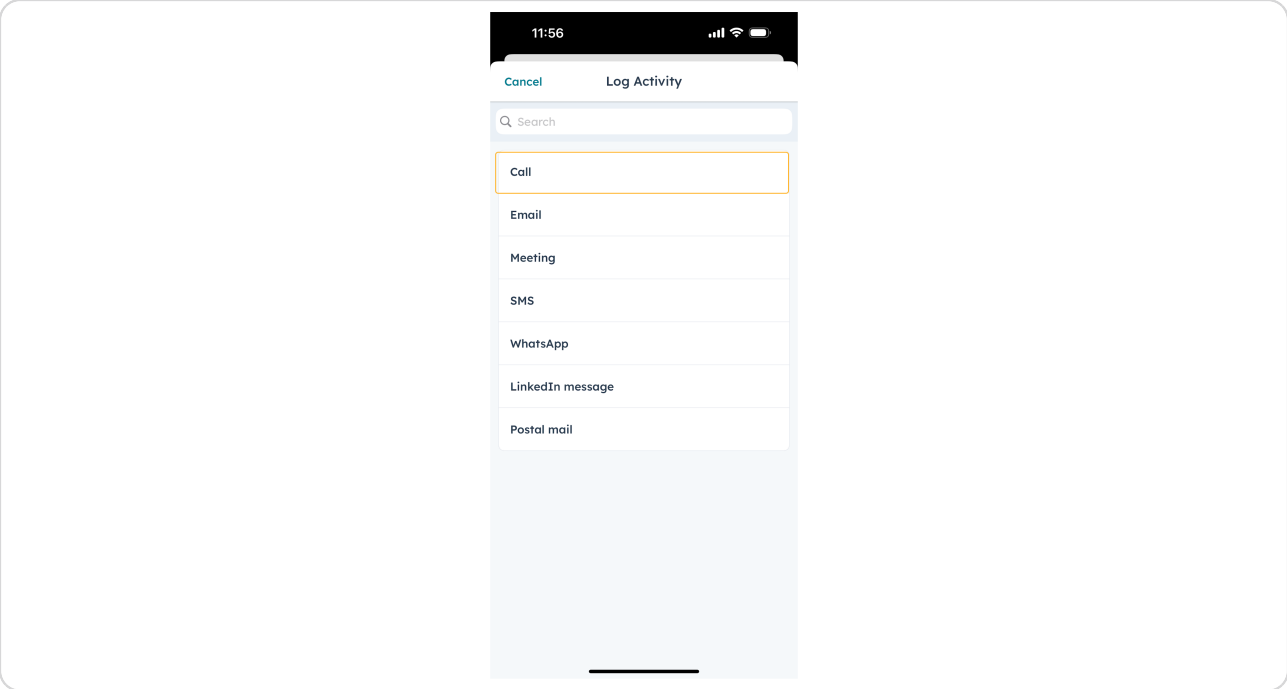
## STEP 17

If someone calls you while you are out and about and you need to log that call, Click on the Log Activity button



**STEP 18**

**Click Call**

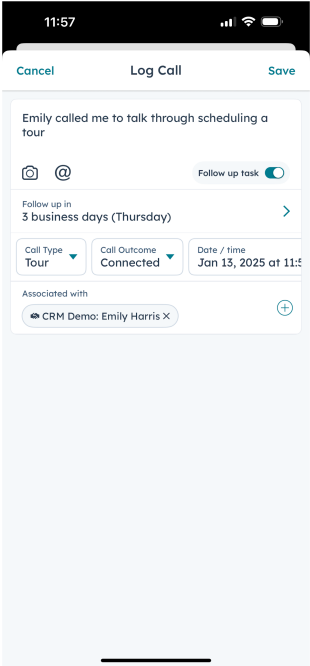


## STEP 19

### Update the Call Log

Include:

- What the call was about
- Call Type
- Call Outcome
- Date/Time
- (Optional) Include a Follow up task

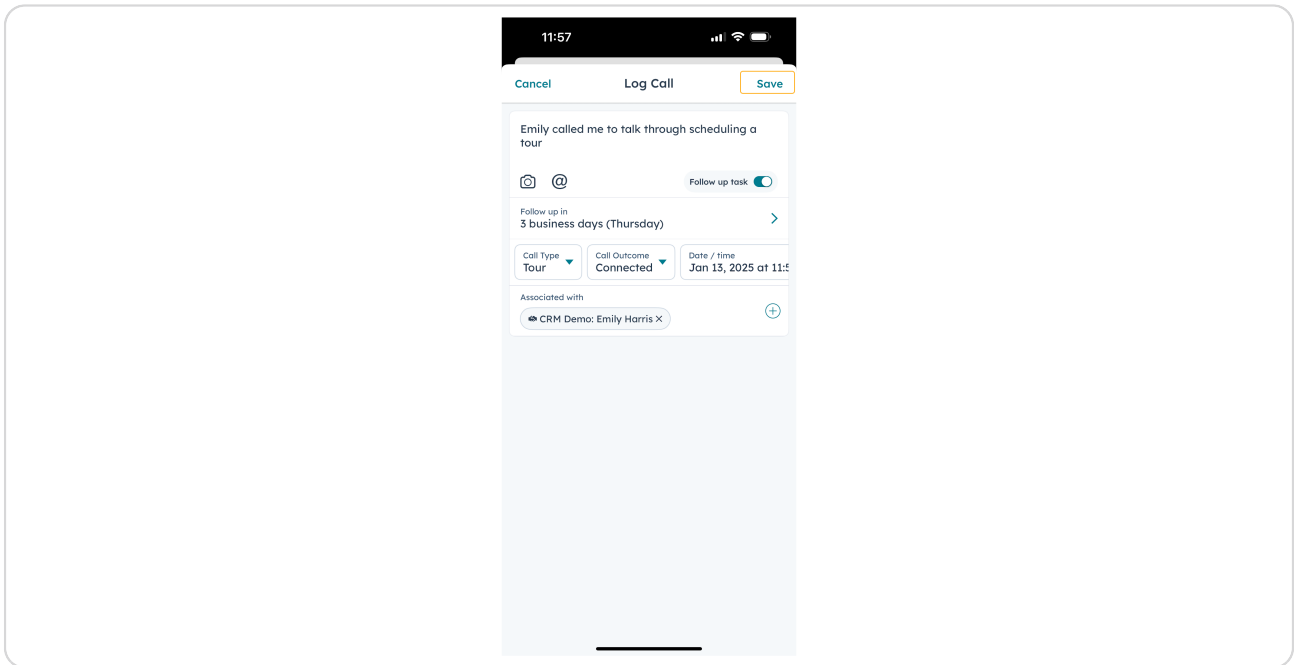


The screenshot shows a mobile application interface for logging a call. At the top, the status bar displays the time 11:57 and signal strength. Below the status bar, there are three buttons: 'Cancel', 'Log Call', and 'Save'. The main content area contains the following information:

- Text: "Emily called me to talk through scheduling a tour"
- Icons: A camera icon and an '@' symbol.
- Toggle: "Follow up task" with a toggle switch turned on.
- Text: "Follow up in 3 business days (Thursday)" with a right-pointing arrow.
- Fields: Three dropdown menus for "Call Type" (set to "Tour"), "Call Outcome" (set to "Connected"), and "Date / time" (set to "Jan 13, 2025 at 11:5").
- Section: "Associated with" containing a tag "CRM Demo: Emily Harris X" with a close button (X) and a plus sign (+).

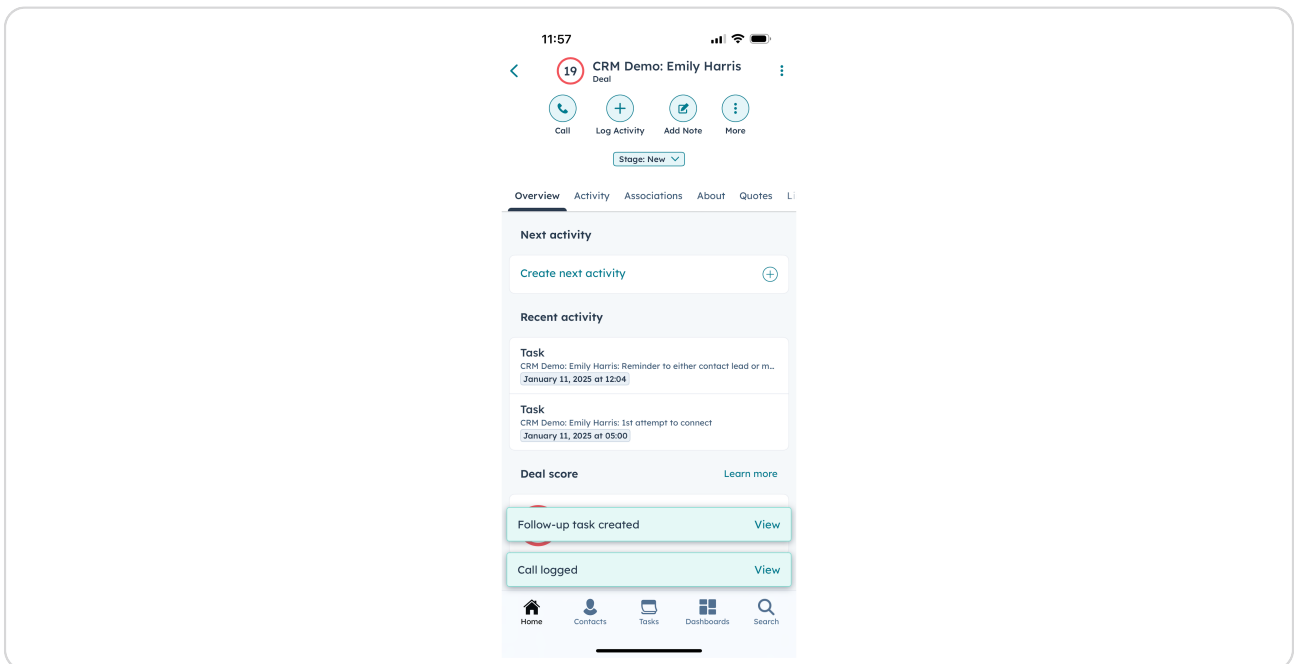
## STEP 20

### Click Save



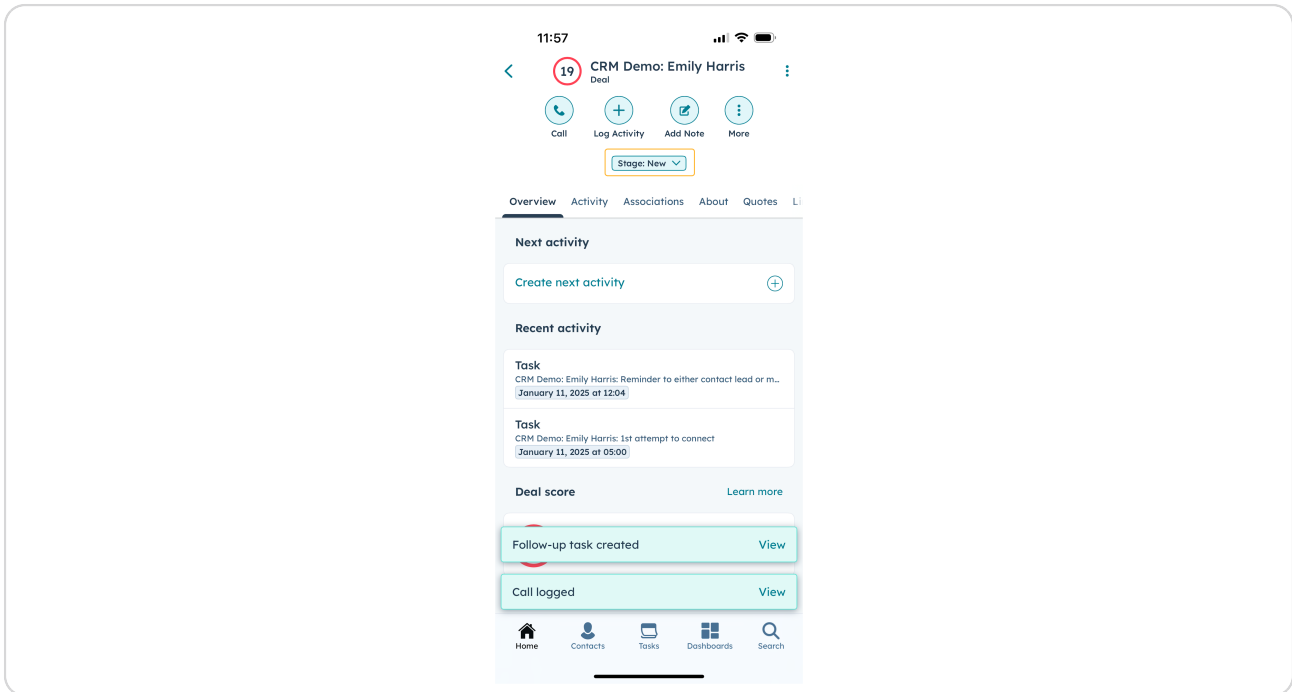
## STEP 21

### You'll be notified that a Call was logged and a Follow-up task was created



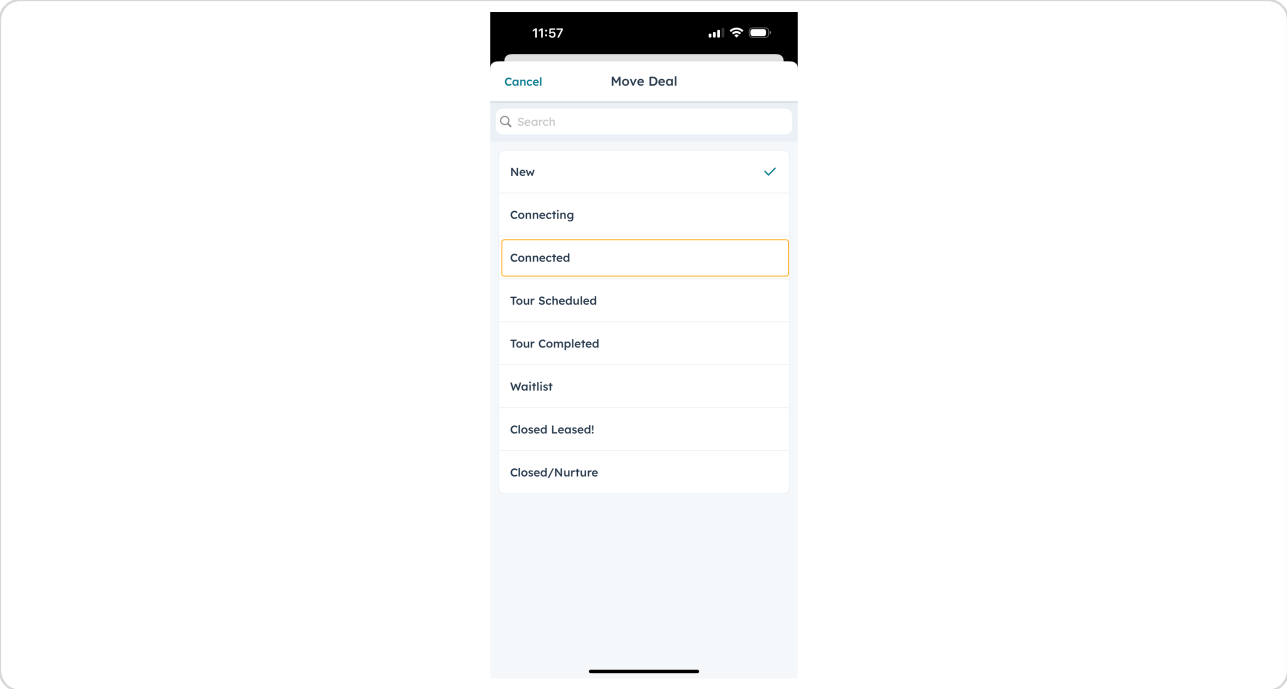
## STEP 22

This Deal now needs to be moved out of the New Stage. At the top of the record, Click the Stage drop down



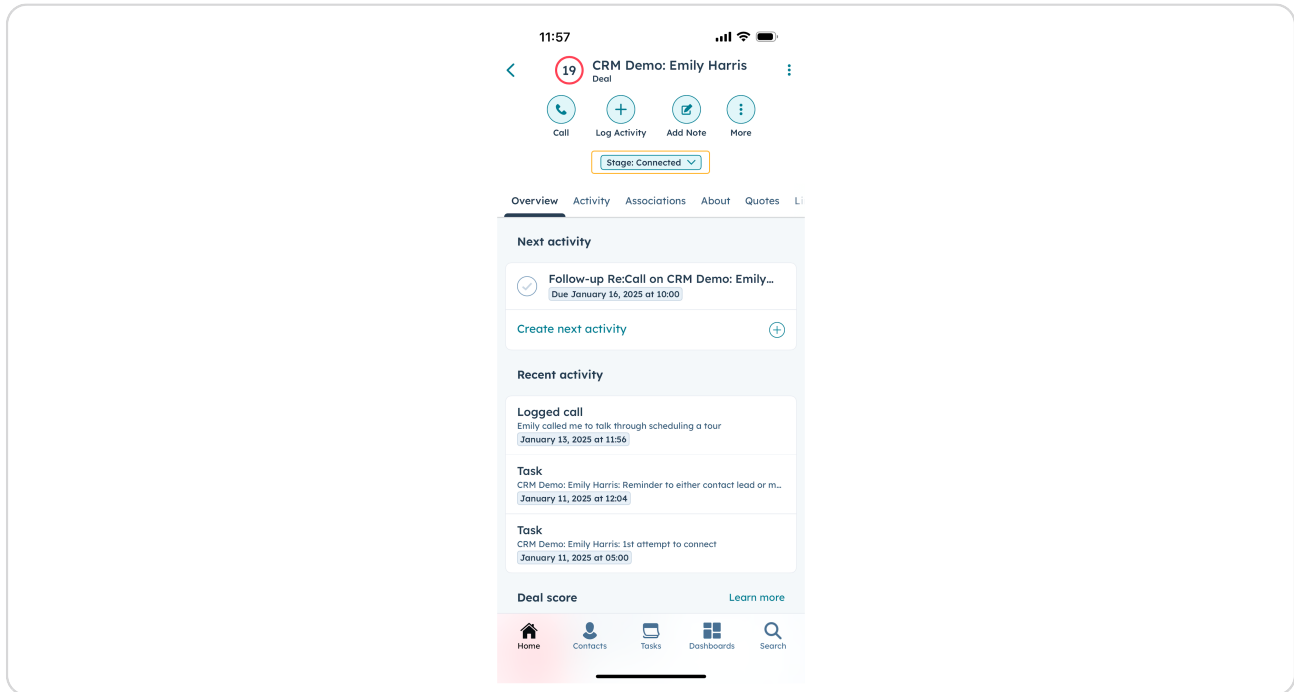
STEP 23

Select the updated stage



## STEP 24

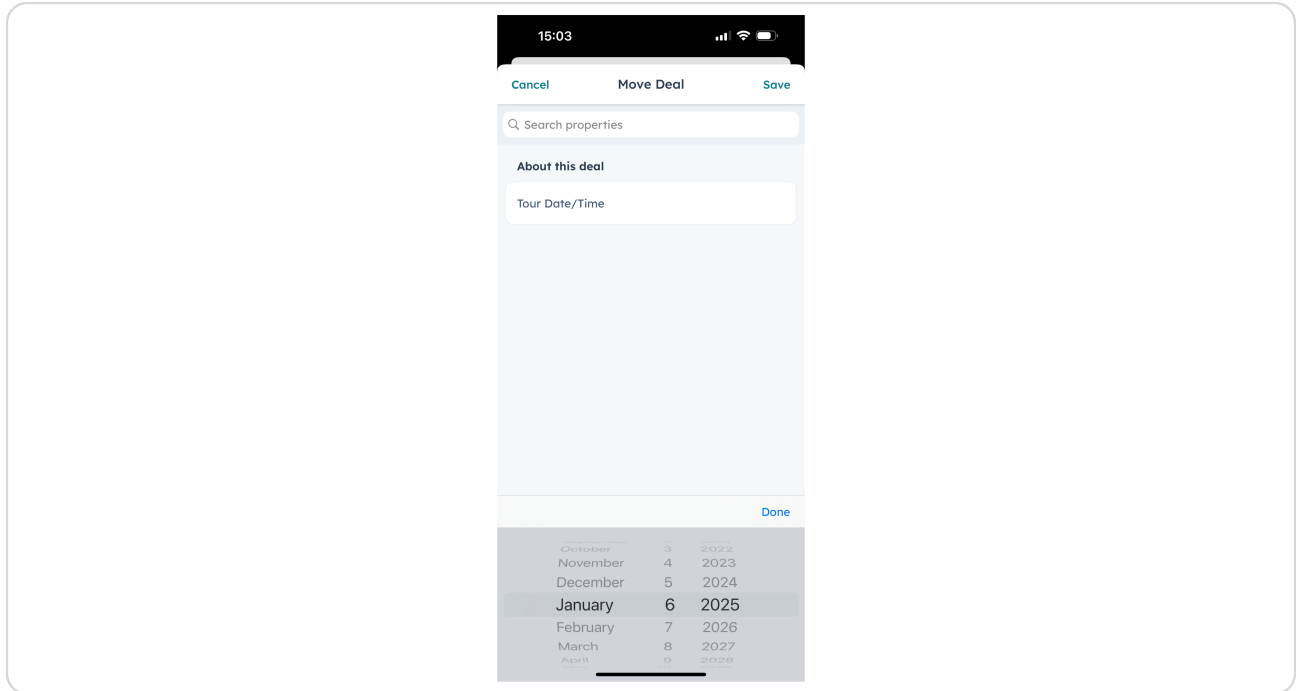
### The Deal will automatically move into the updated stage



## STEP 25

**Note: If you move a Deal into a stage that needs more information, you will be prompted with the information that needs updated.**

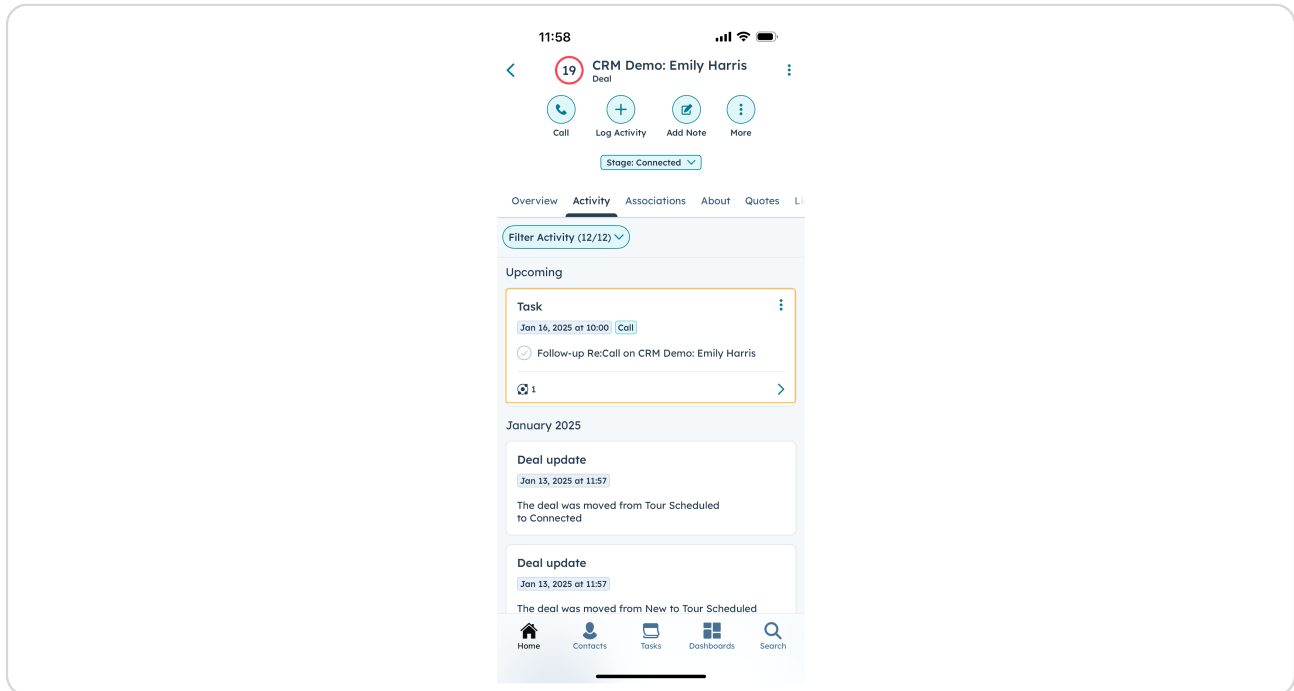
For example: If you move a Deal into Tour Scheduled, HubSpot will prompt you to update information about when the tour is scheduled for.



## STEP 26

### To see specific updates to the Deal, Click on the Activity tab

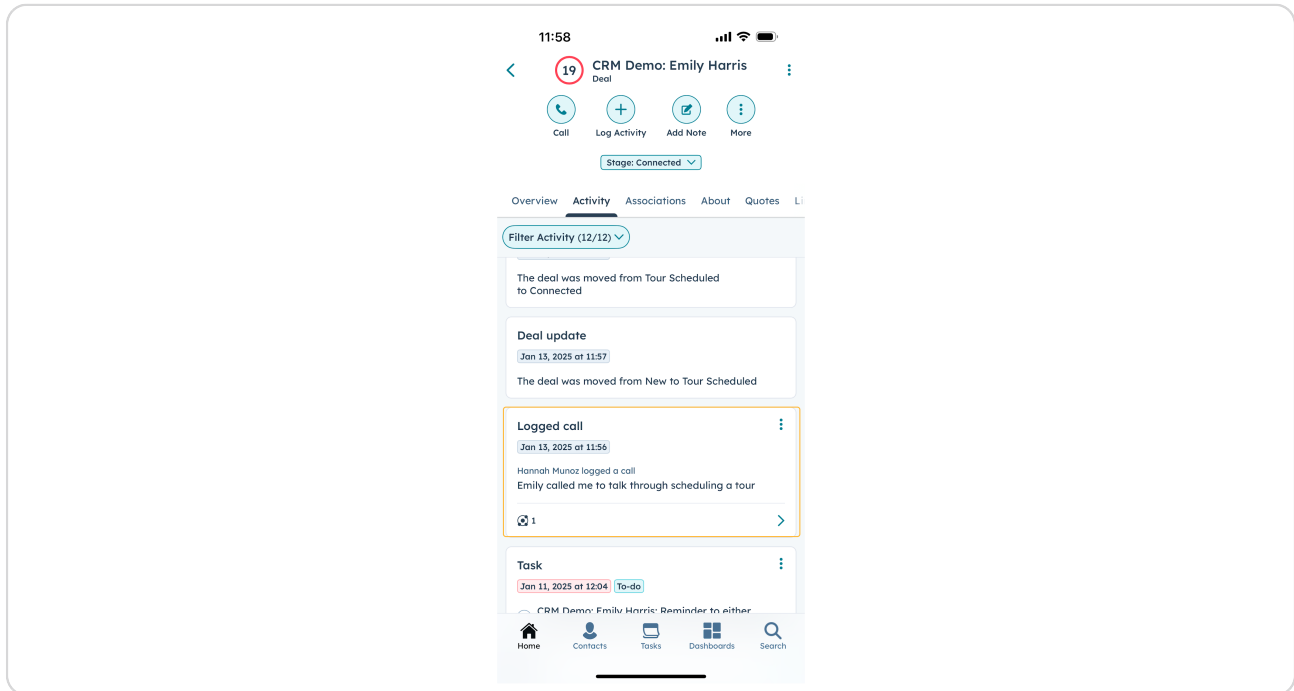
Here you will see the Deal updates as well as the Task created from the Logged call.



## STEP 27

### Scroll down to see more updates on the Deal

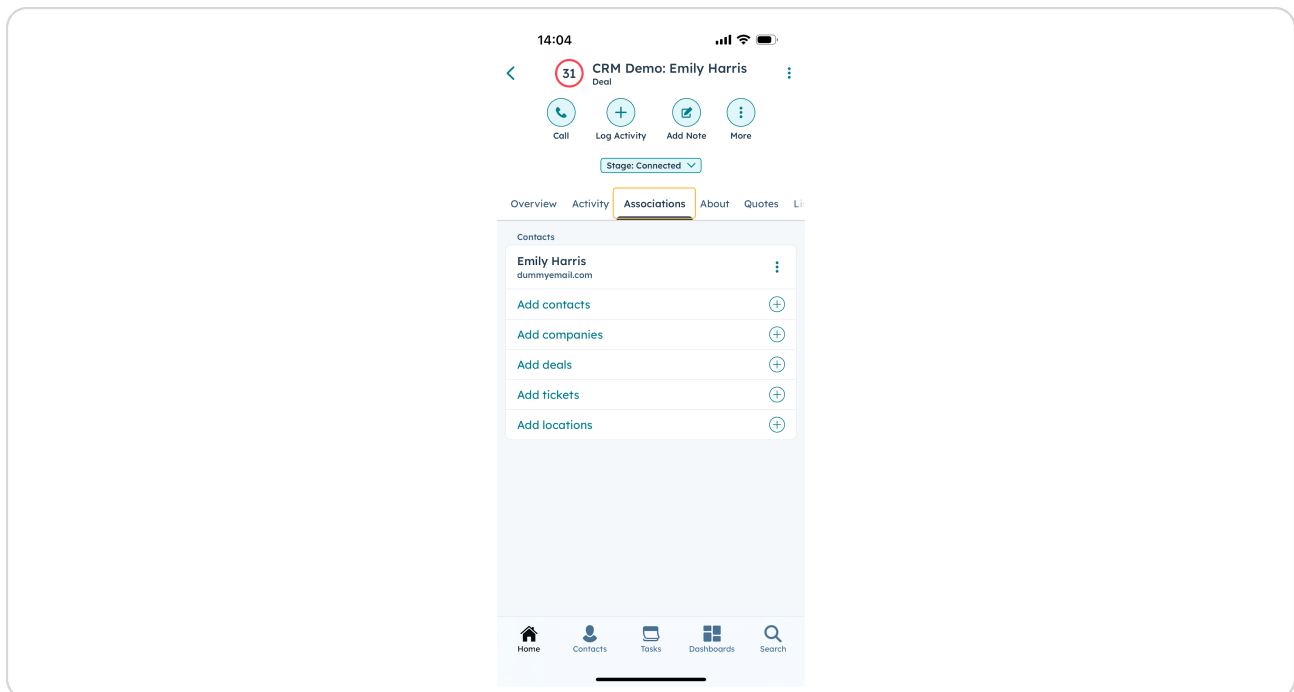
In this case we can scroll to see the Logged call.



## STEP 28

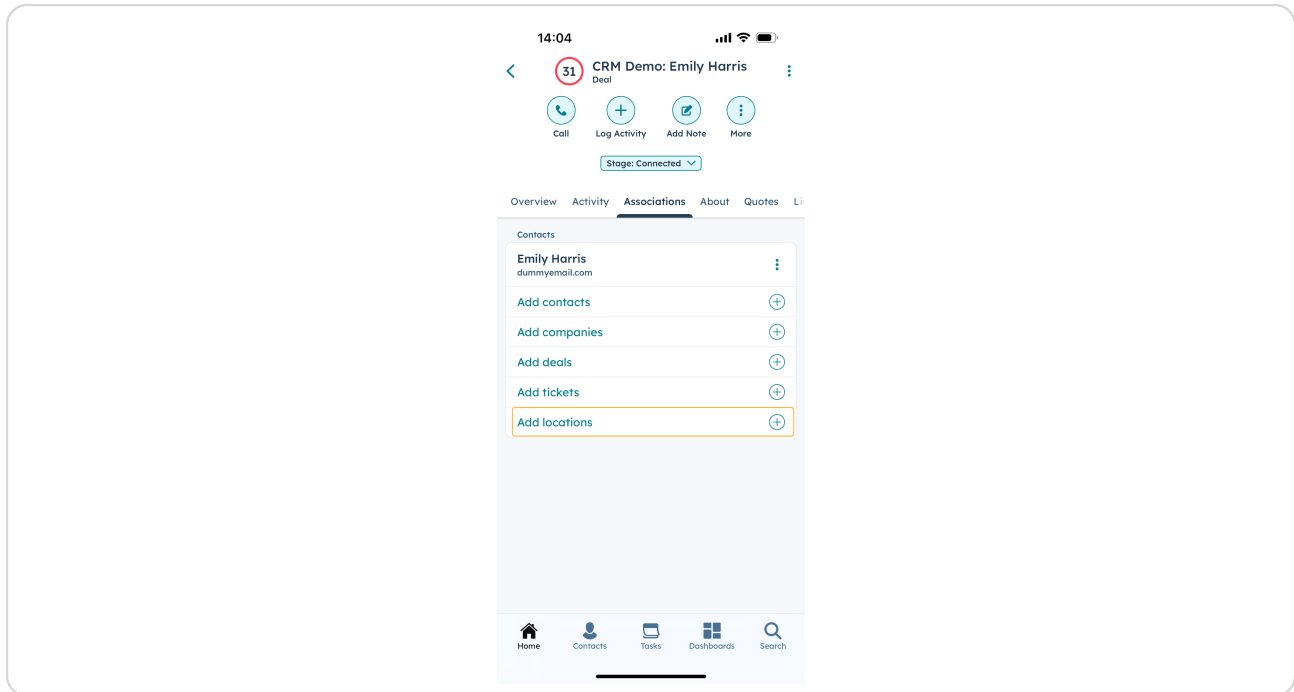
### Click on Associations

Here you will see the Pro connected to the Deal under the Contacts section. If there is any other information that needs to be added about the Deal, add that here.



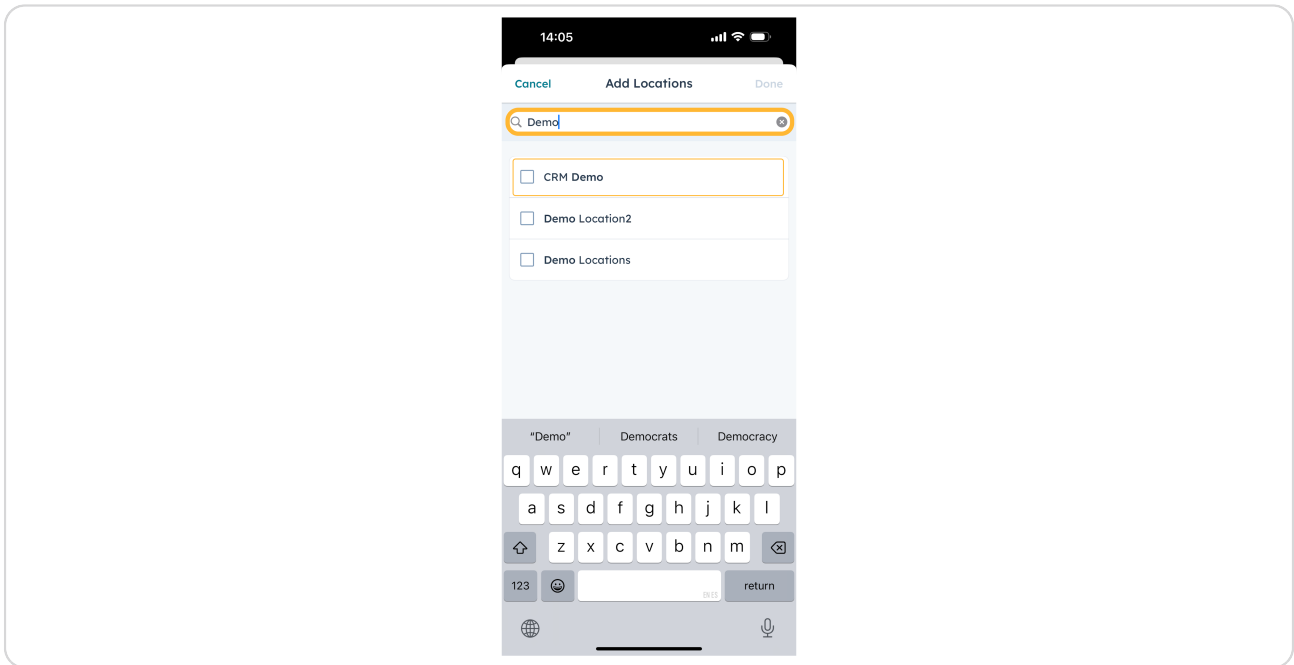
## STEP 29

To add an Association - in this case a Location - Click the plus button next to Add locations



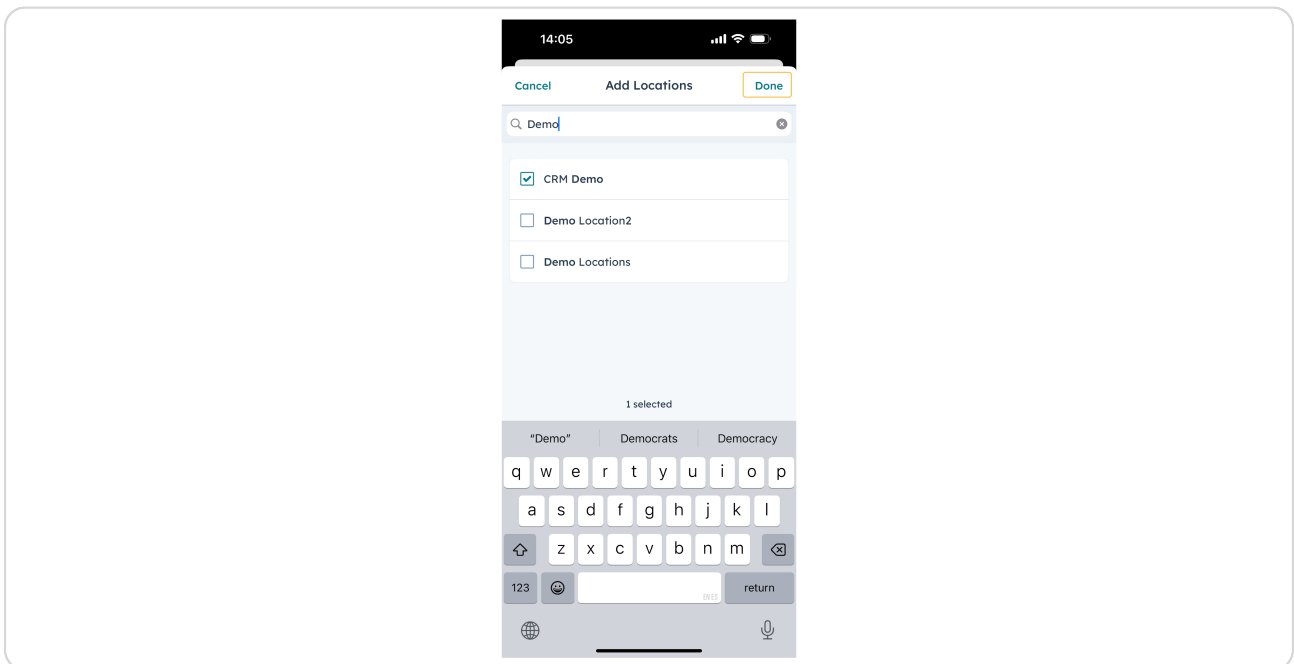
## STEP 30

### Search for a Location and check off the Location for the Deal



## STEP 31

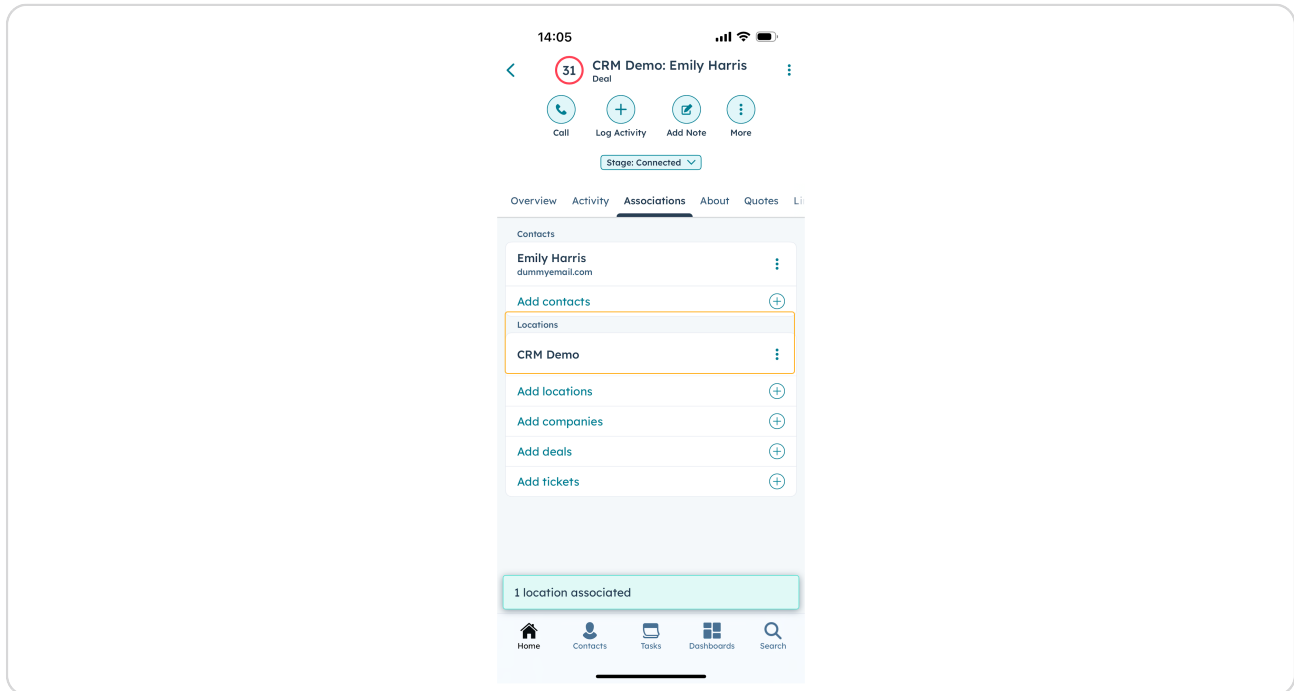
### Click Done



## STEP 32

### The Location will be added

Note: It can take a second for the Deal to update. Pull down on the screen to refresh it.



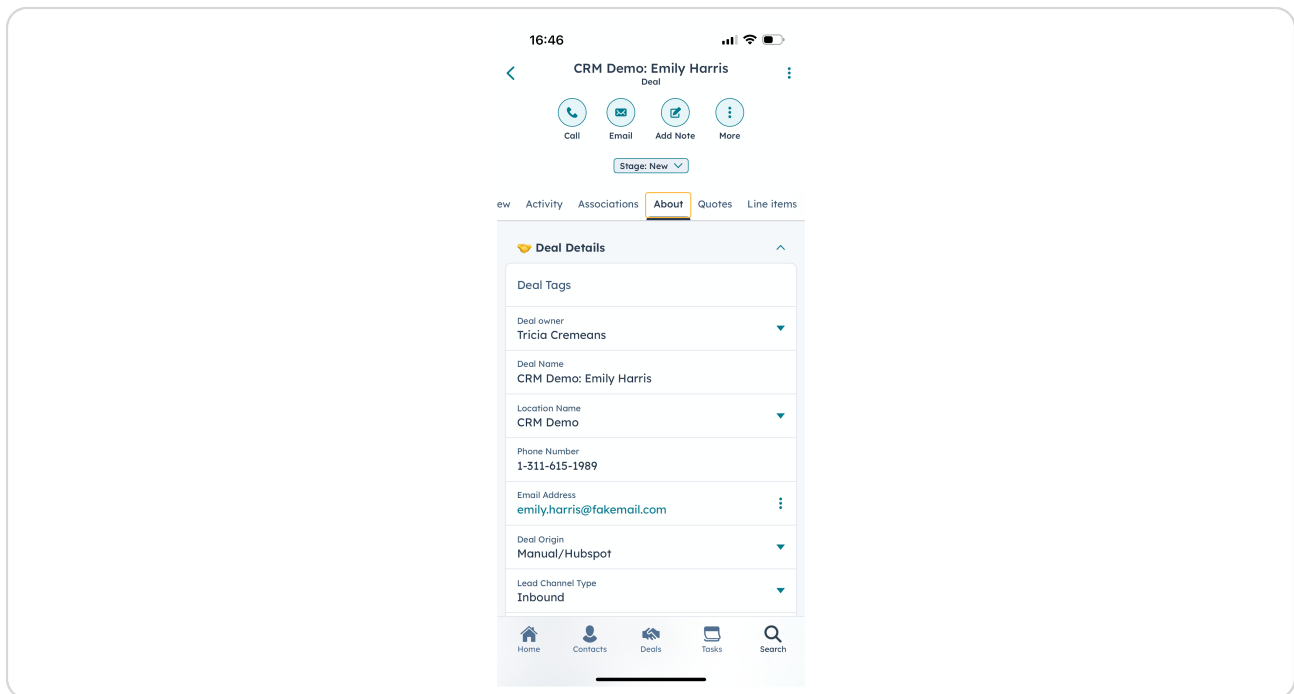
## STEP 33

### Access all information about the Deal on the About tab

Here you will see information on:

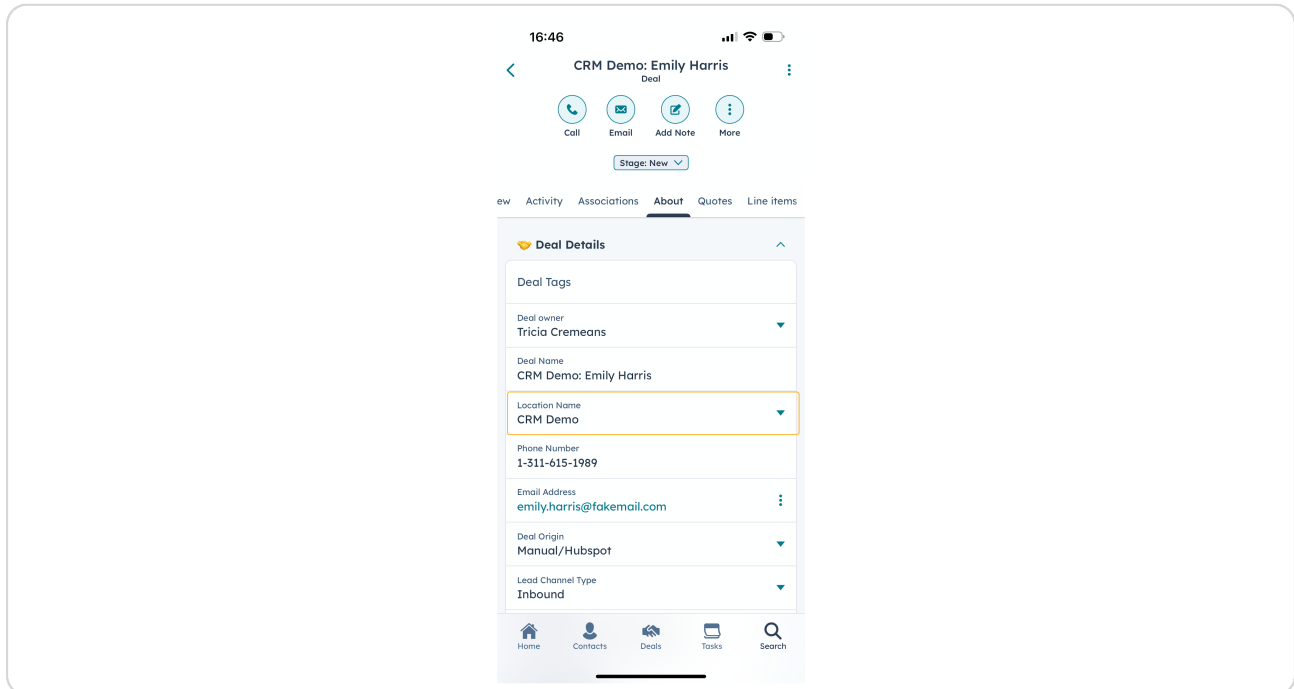
- Deal Details
- Tour Info
- Deal Discovery
- Lead Source
- Campaign Info
- Closing Details

Utilize this tab to update information as you're talking to a Pro.



## STEP 34

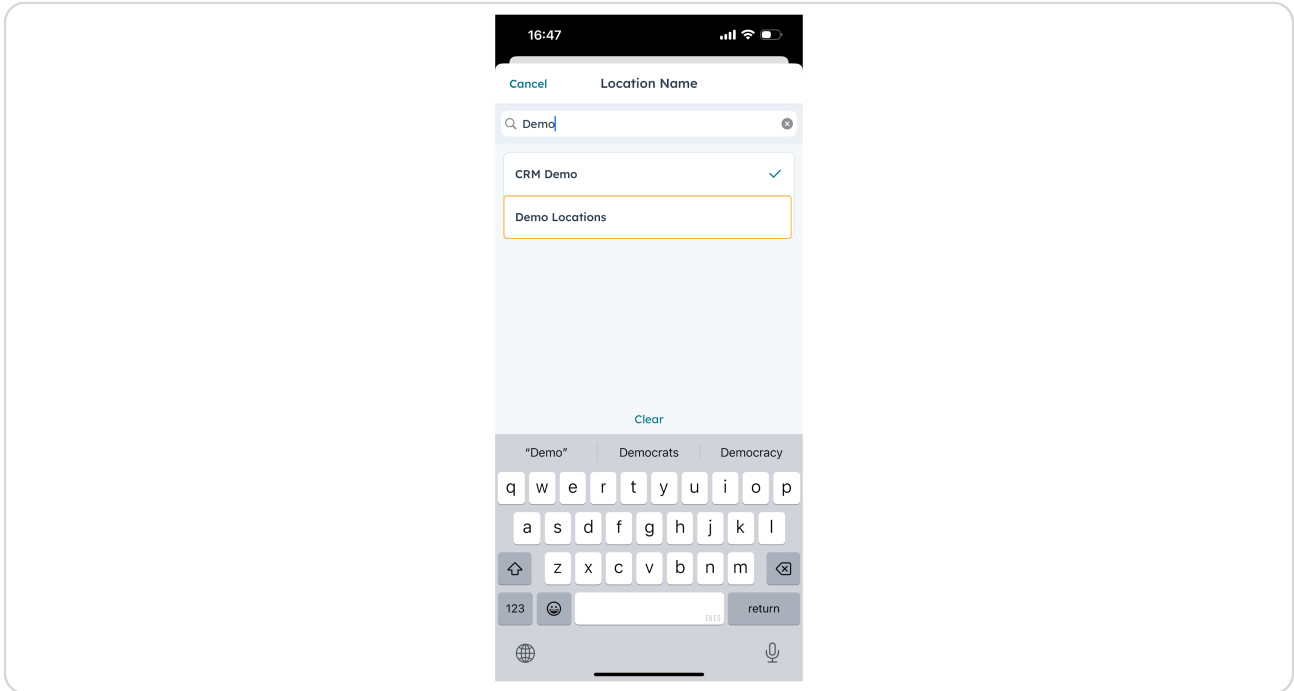
If you need to add missing information or update existing information, Click into the field that needs to be updated



## STEP 35

### Update the field

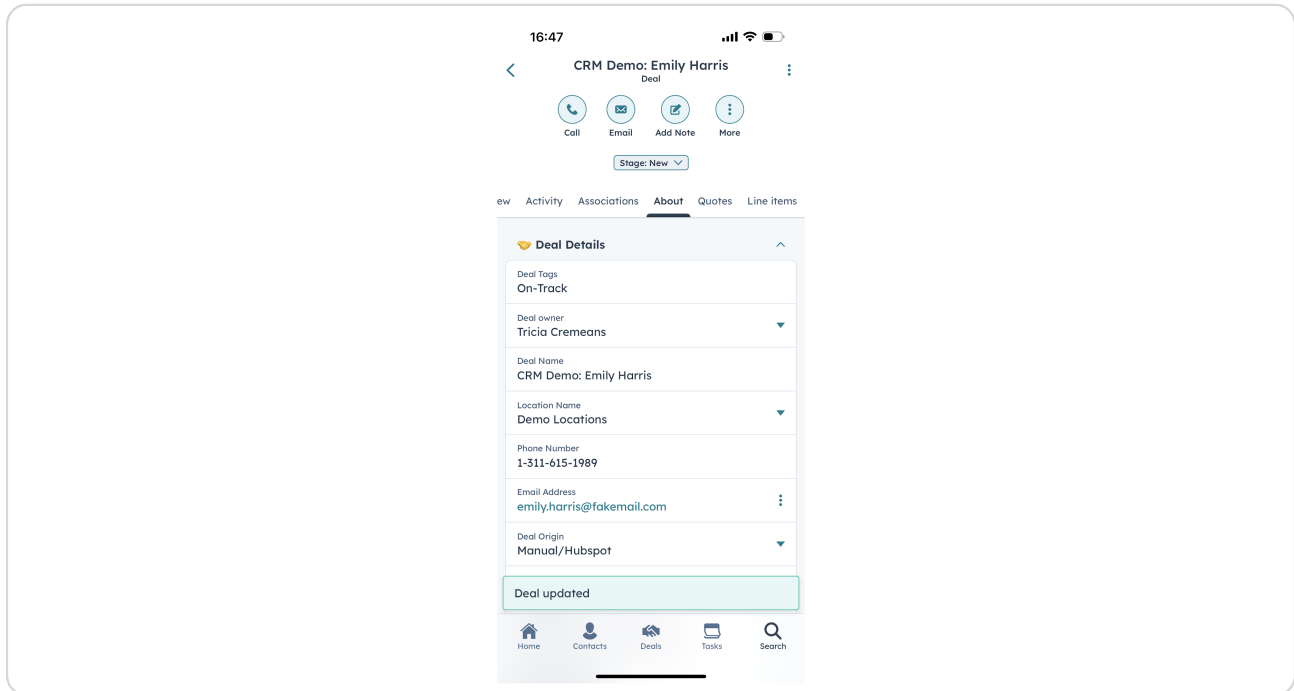
Note: Some fields you will need to Click on, Update and then Click Save.



## STEP 36

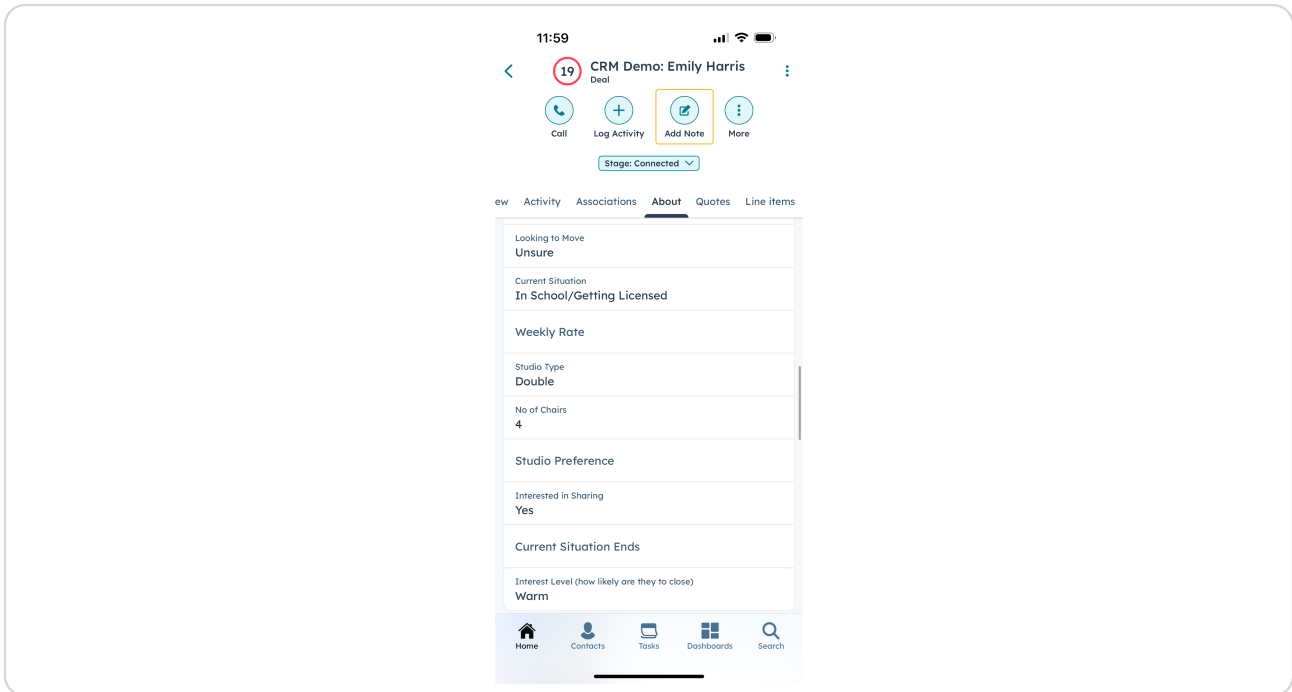
### The field will automatically save

Note: Some fields you will need to Click on, Update and then Click Save.



## STEP 37

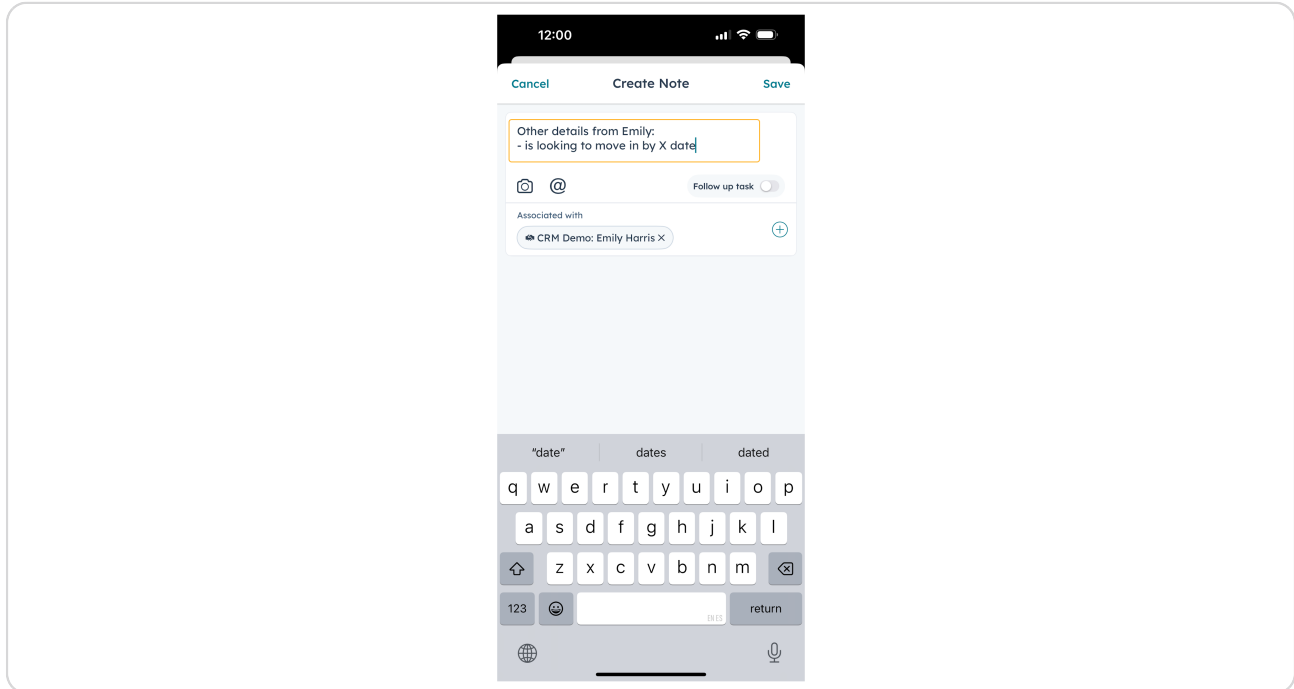
If you need to leave a note about the Deal, Click the Add Note button at the top of the Deal



## STEP 38

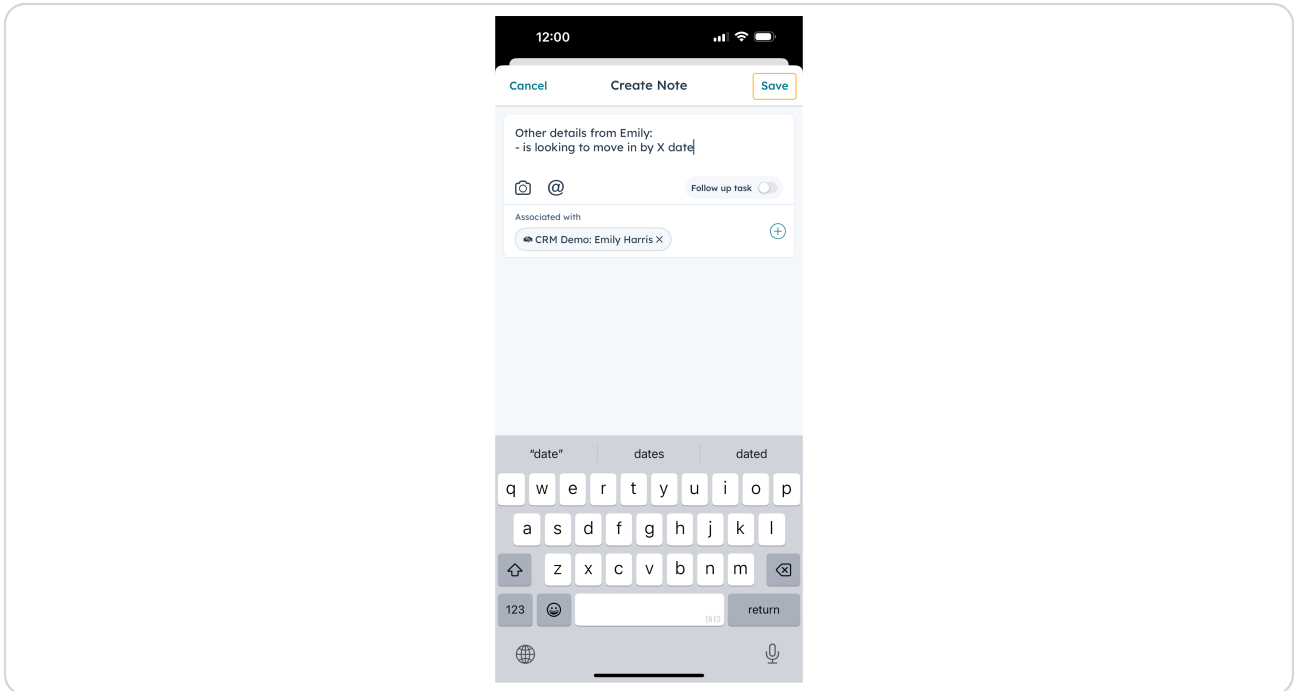
**Include any relevant information you need recorded to the Deal.**

Notes are a great way to log information that you can refer back to on the Activity timeline.



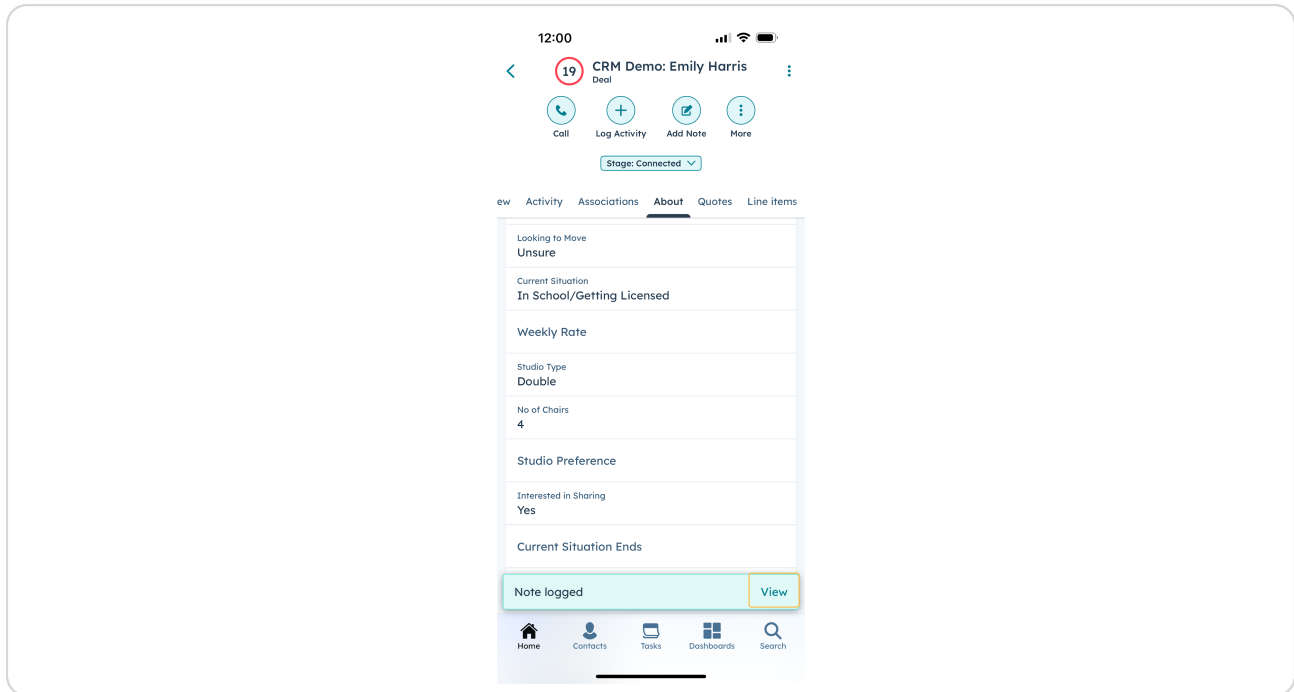
## STEP 39

### Click Save



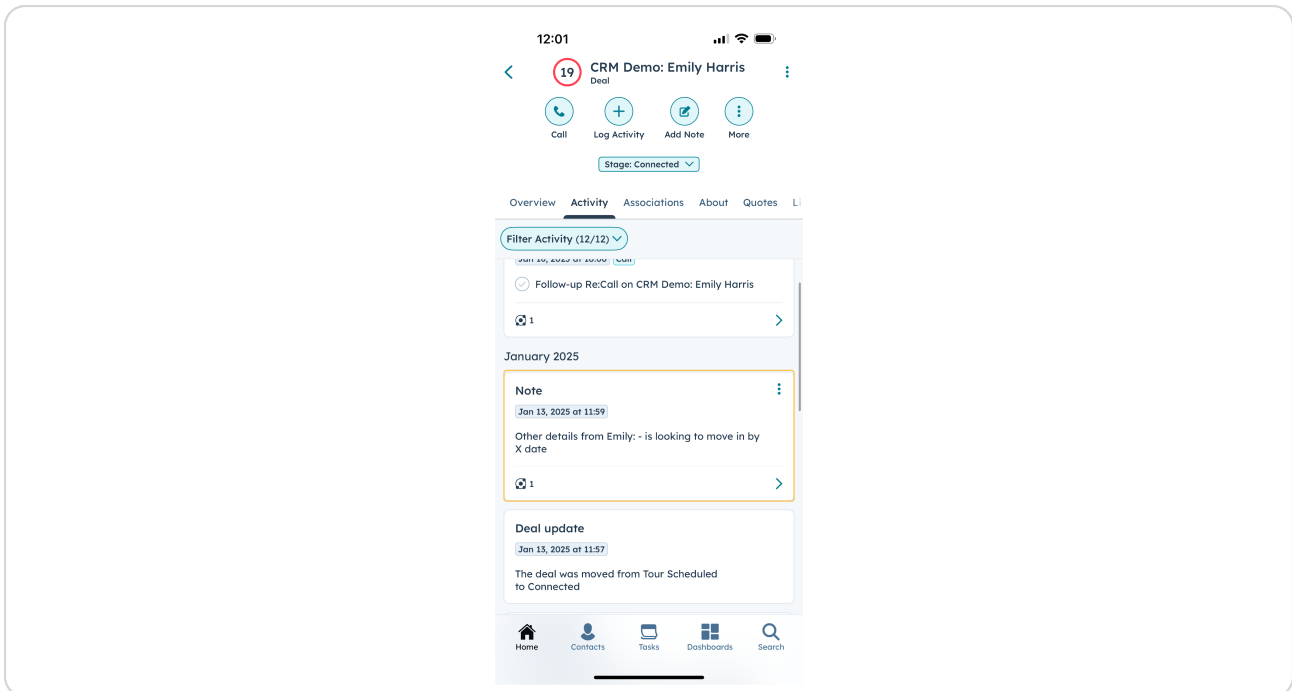
## STEP 40

The app will let you know the Note was logged. Click View on the notification to see the Note in the Activity timeline



## STEP 41

### You'll be taken to the Note in the Activity timeline

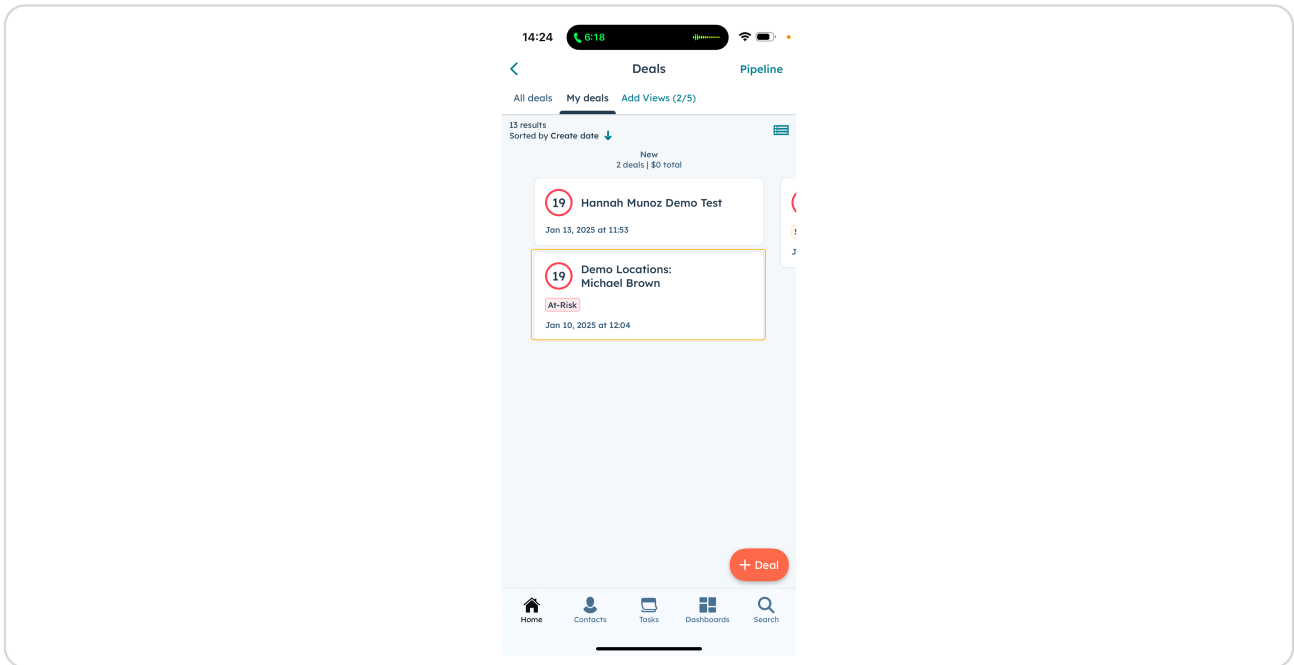


## # Scheduling a Tour

15 Steps

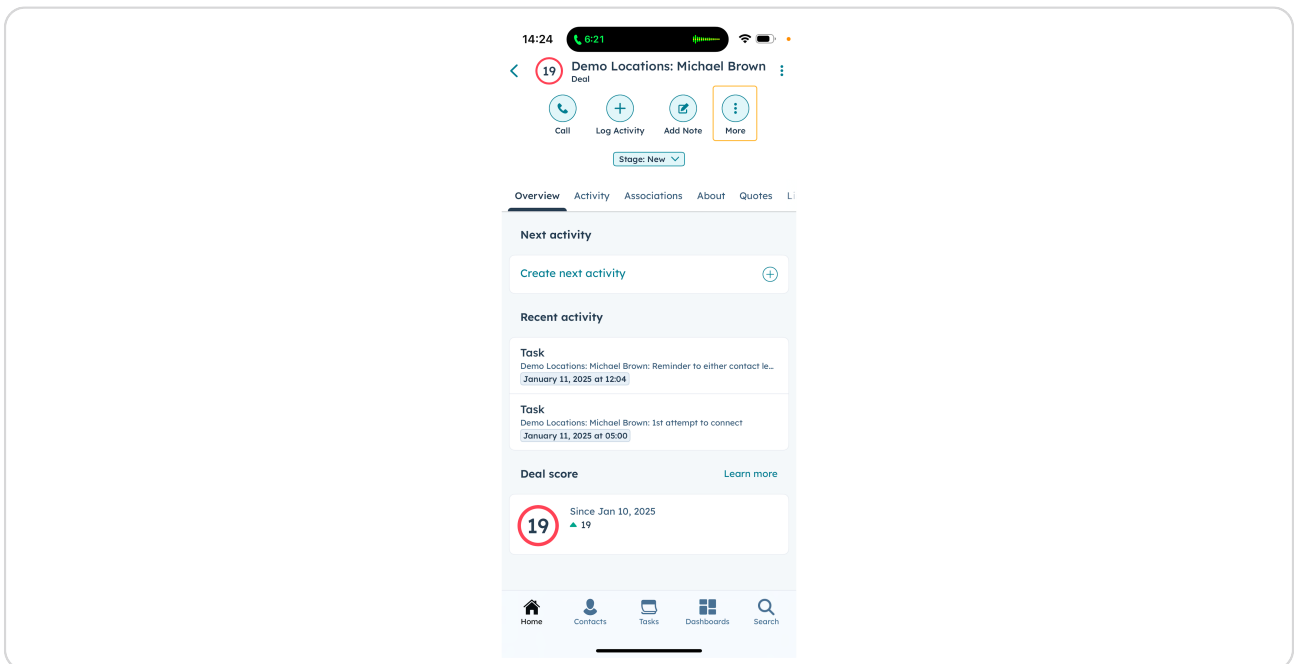
## STEP 42

### Click into a Deal



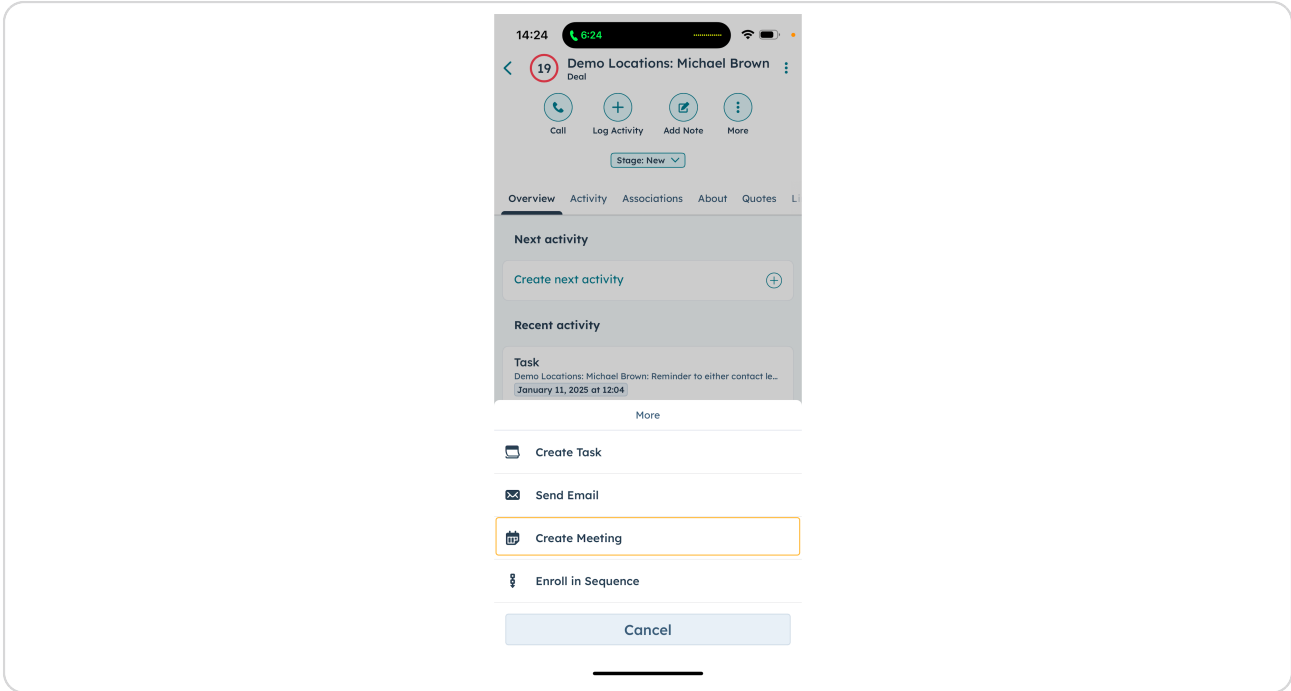
## STEP 43

### At the top, Click the More button



STEP 44

Click Create Meeting

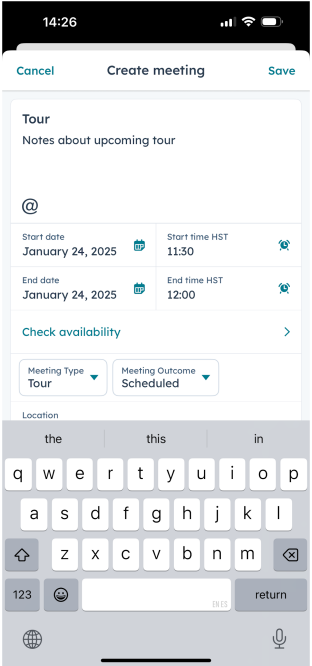


## STEP 45

### Update the Tour information

This includes:

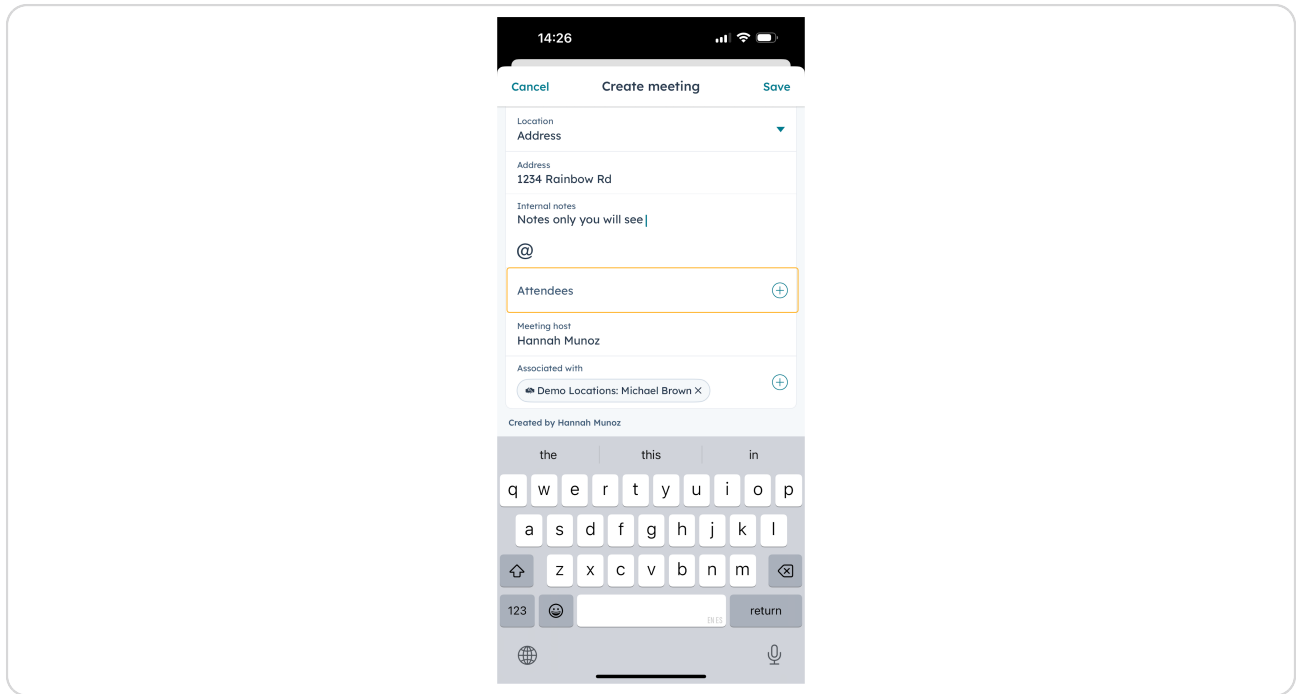
- Meeting title
- Meeting description
- Start date and time
- End date and time
- Meeting Type
- Location
- Internal notes (optional) - these are notes only you can see
- Attendees



The screenshot shows a mobile application interface for creating a meeting. At the top, there are three buttons: "Cancel", "Create meeting", and "Save". Below this is a form titled "Tour" with the subtitle "Notes about upcoming tour". There is a text input field with an "@" symbol, likely for adding attendees. Below that are two rows of date and time pickers: "Start date" (January 24, 2025) and "Start time HST" (11:30), and "End date" (January 24, 2025) and "End time HST" (12:00). There is a "Check availability" link with a right arrow. Below that are two dropdown menus: "Meeting Type" (set to "Tour") and "Meeting Outcome" (set to "Scheduled"). At the bottom, there is a "Location" label and a keyboard with predictive text suggestions ("the", "this", "in").

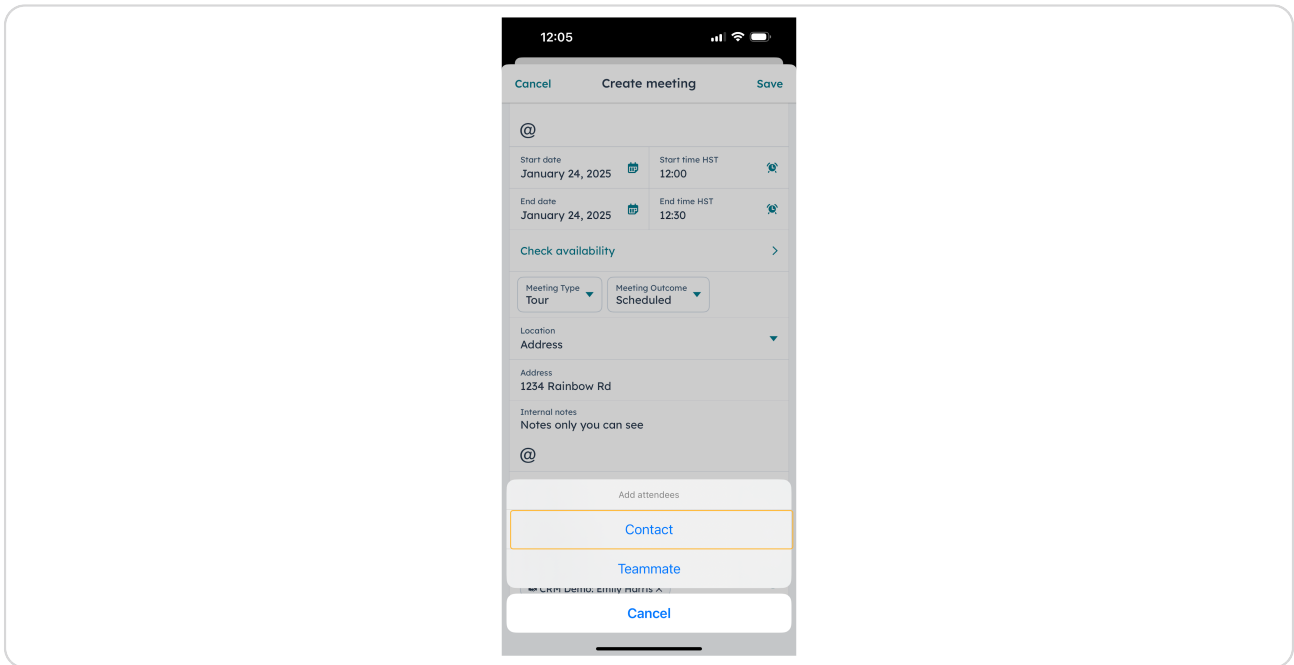
## STEP 46

You will need to manually add the Pro to the meeting by searching for them. Click the Plus on the Attendees section



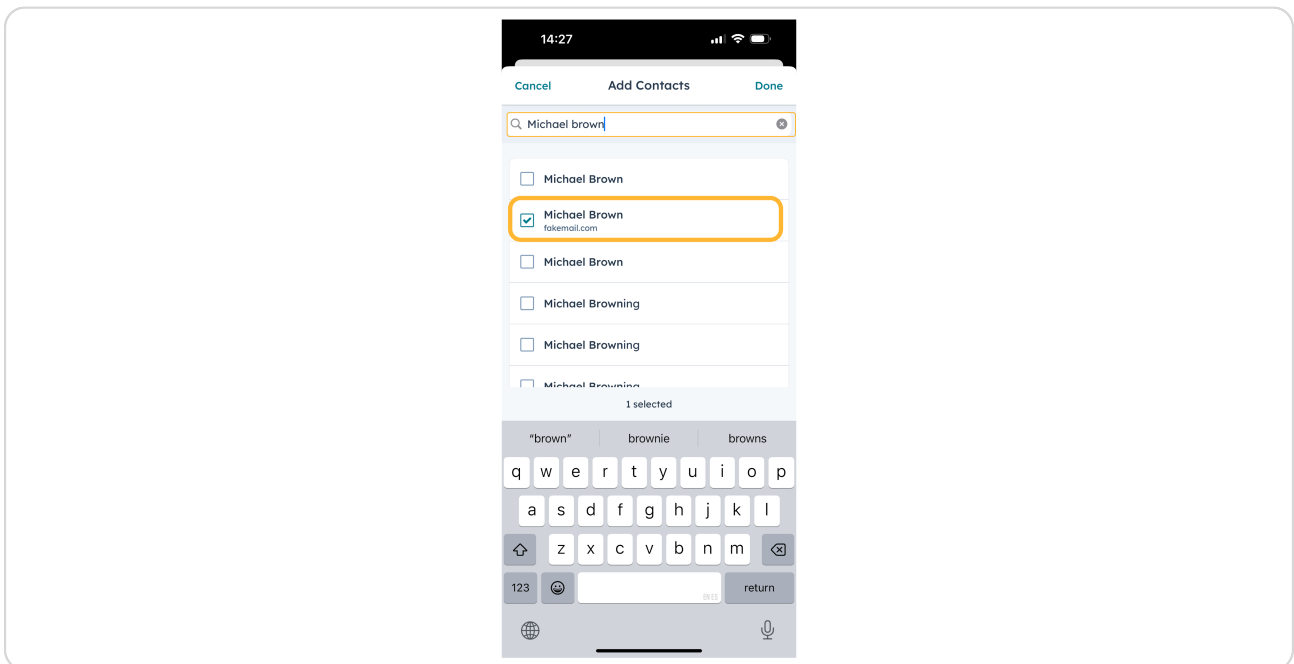
## STEP 47

### Click Contact



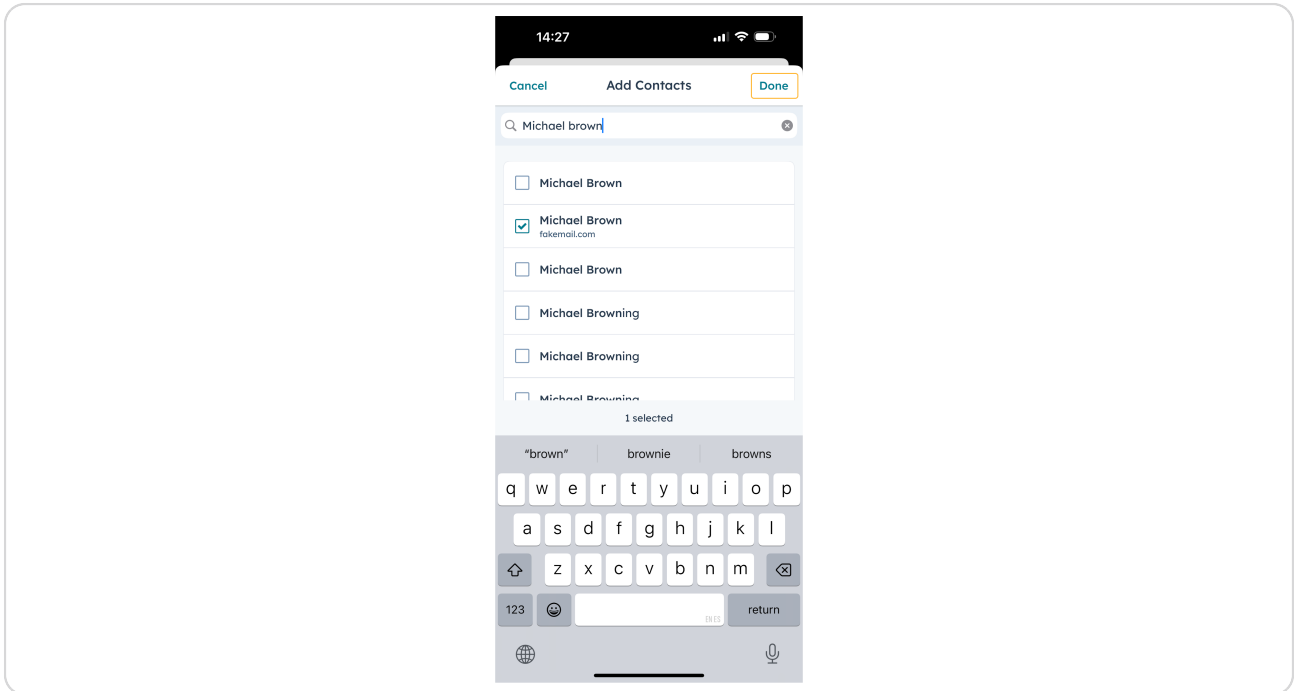
## STEP 48

### Search and choose the Pro



## STEP 49

### Click Done



## STEP 50

Once the meeting is set, Click Save

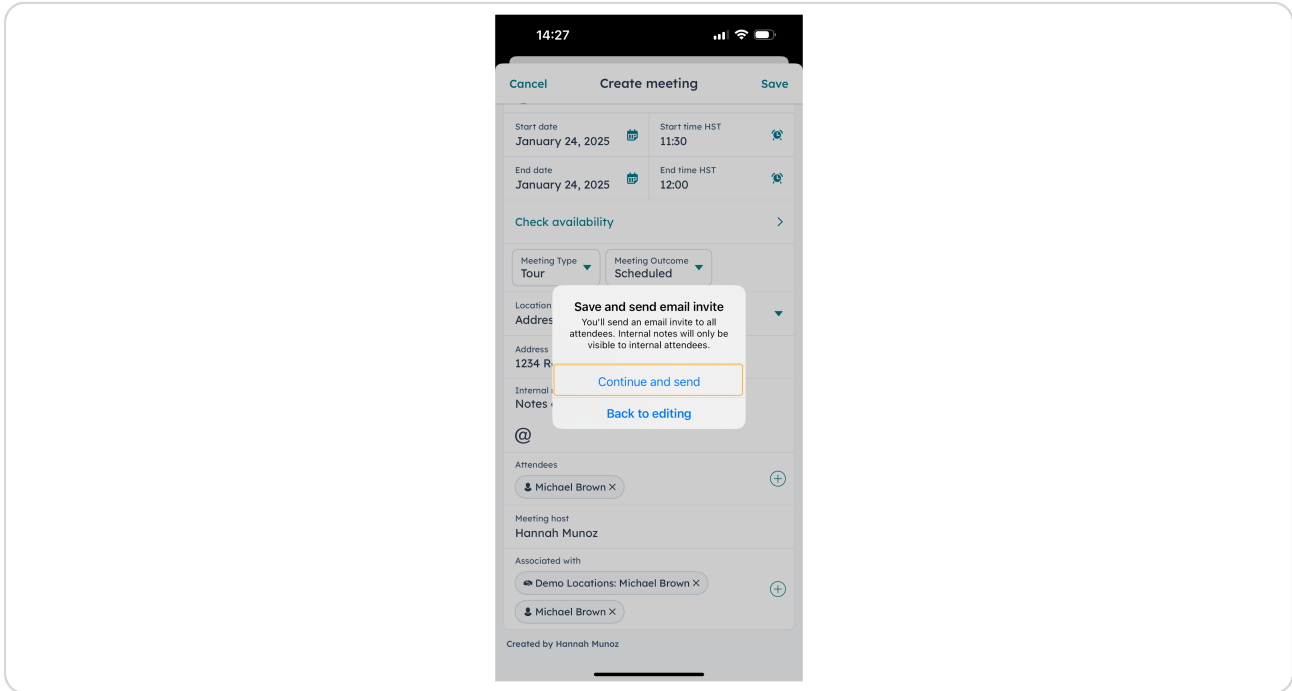
The screenshot displays a mobile application interface for creating a meeting. At the top, there are three buttons: 'Cancel', 'Create meeting', and 'Save'. The 'Save' button is highlighted with a yellow border. Below the buttons, the form contains the following fields and options:

- Start date:** January 24, 2025
- Start time HST:** 11:30
- End date:** January 24, 2025
- End time HST:** 12:00
- Check availability:** A link with a right-pointing arrow.
- Meeting Type:** A dropdown menu set to 'Tour'.
- Meeting Outcome:** A dropdown menu set to 'Scheduled'.
- Location:** A dropdown menu set to 'Address'.
- Address:** 1234 Rainbow Rd
- Internal notes:** Notes only you will see
- Attendees:** A list containing 'Michael Brown X' with a plus icon to add more.
- Meeting host:** Hannah Munoz
- Associated with:** A list containing 'Demo Locations: Michael Brown X' and 'Michael Brown X' with a plus icon to add more.
- Footer:** Created by Hannah Munoz

## STEP 51

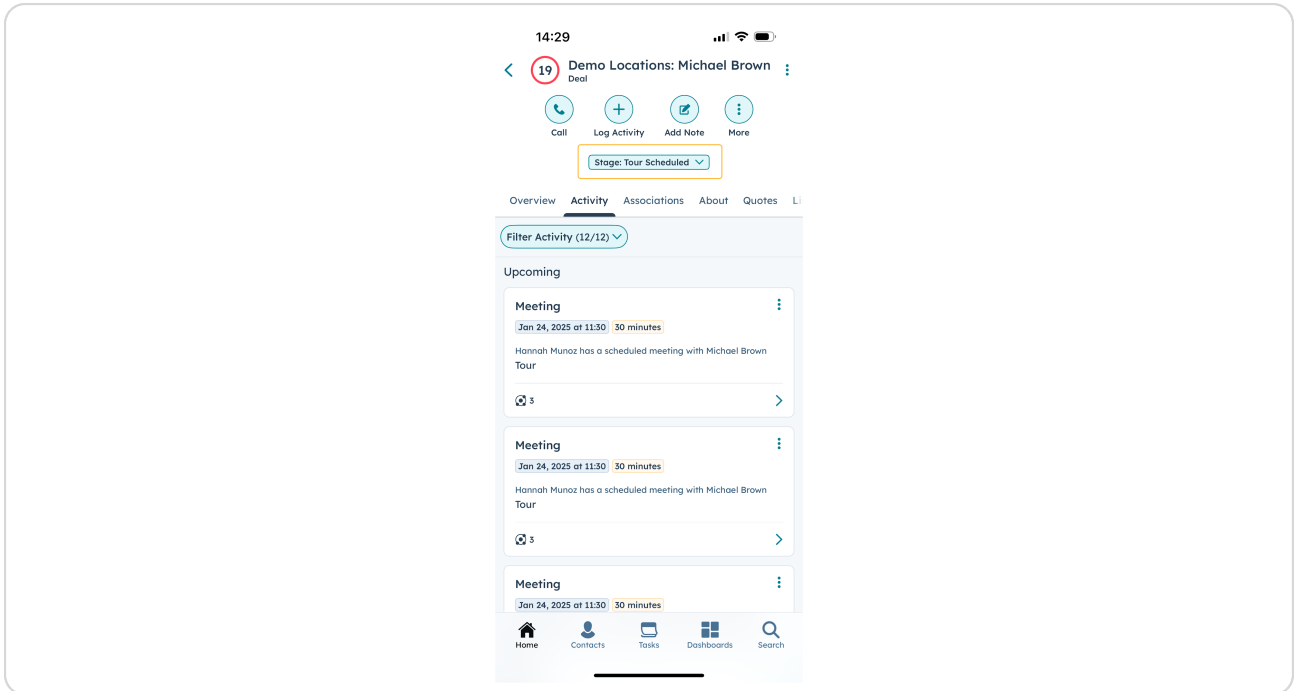
### Click Continue and send

By clicking this you'll send an email invite to the Pro.



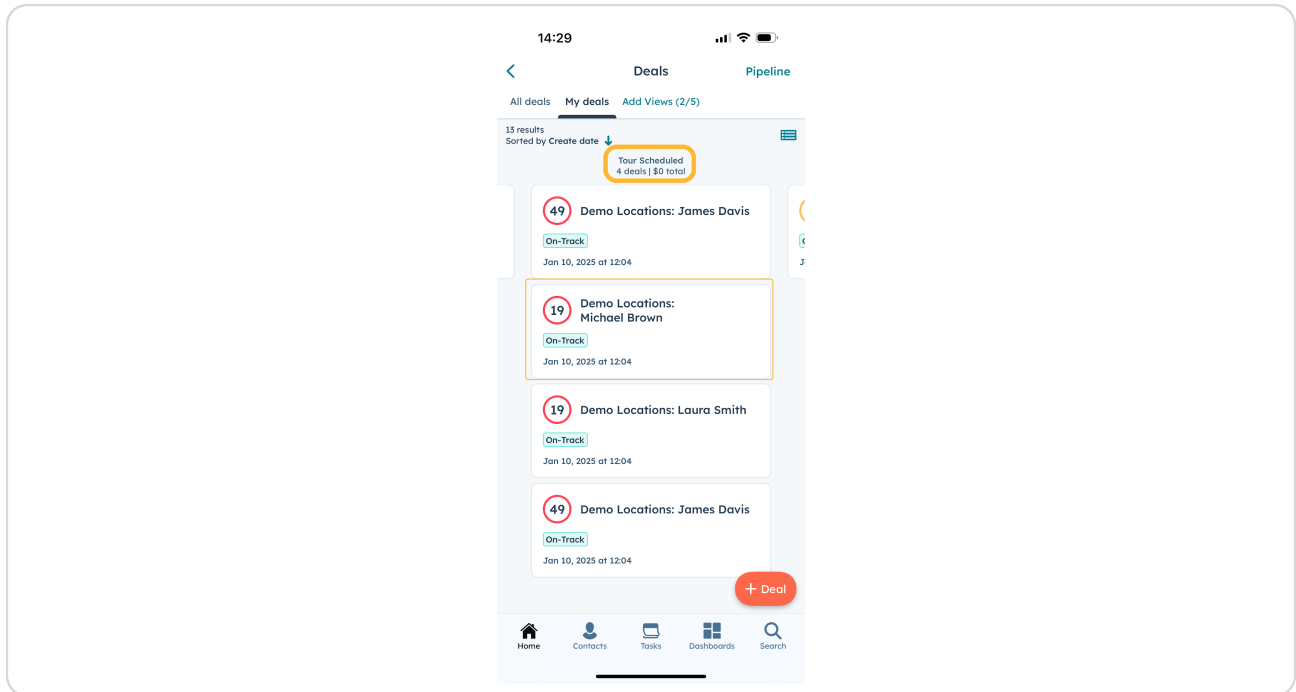
## STEP 52

### The Deal will automatically update to the Stage: Tour Scheduled



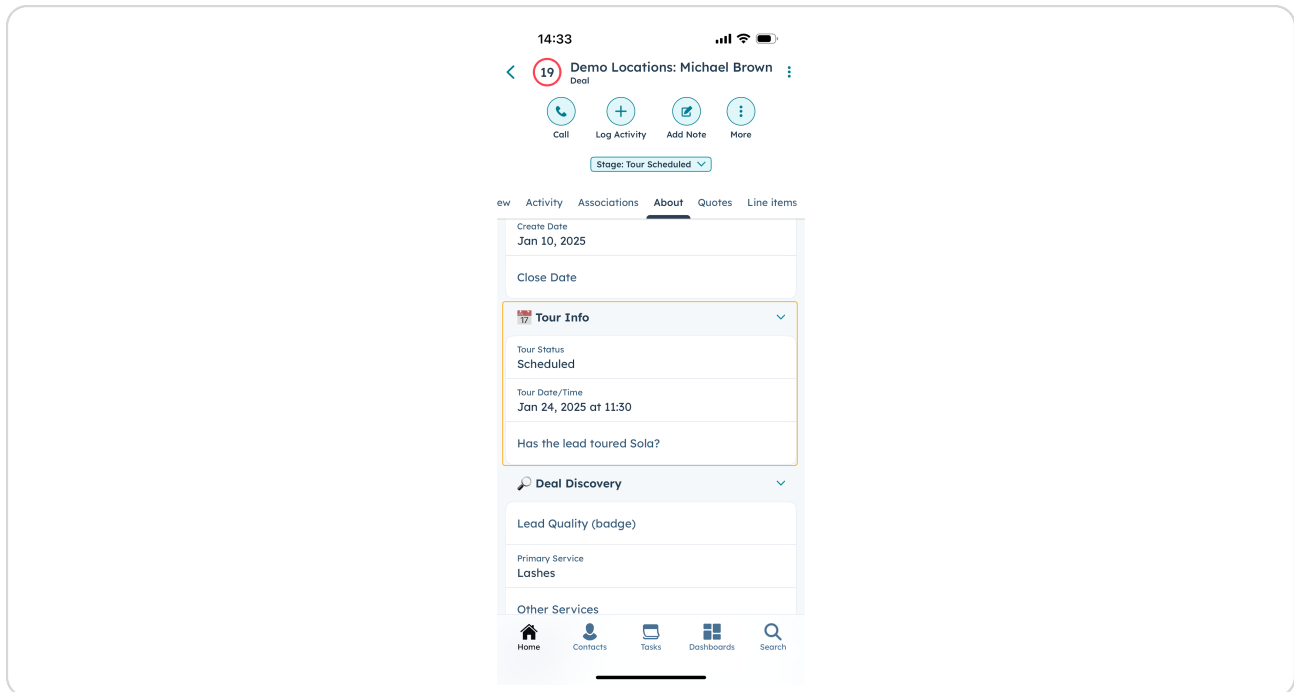
## STEP 53

In the Kanban view, the Deal will move into the Tour Scheduled column of the Leasing Pipeline



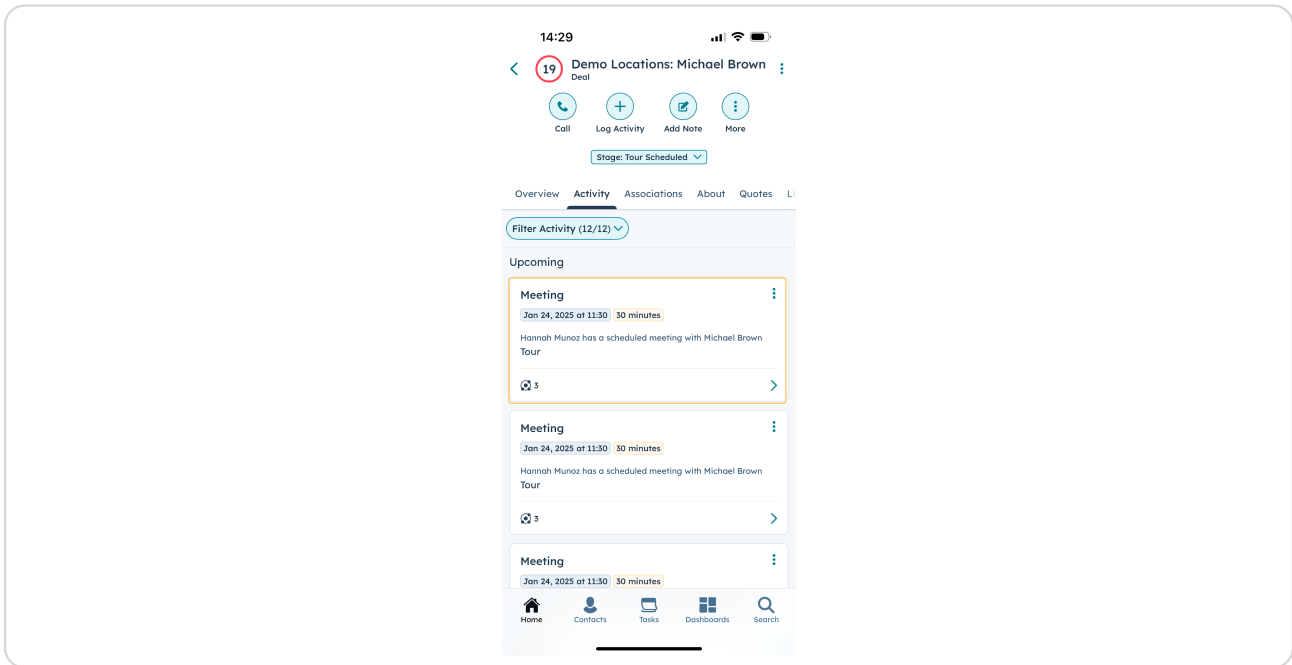
## STEP 54

The Tour Info on the About tab will automatically be updated to show the Tour Status of Scheduled with the Tour Date/Time for when the Tour was scheduled



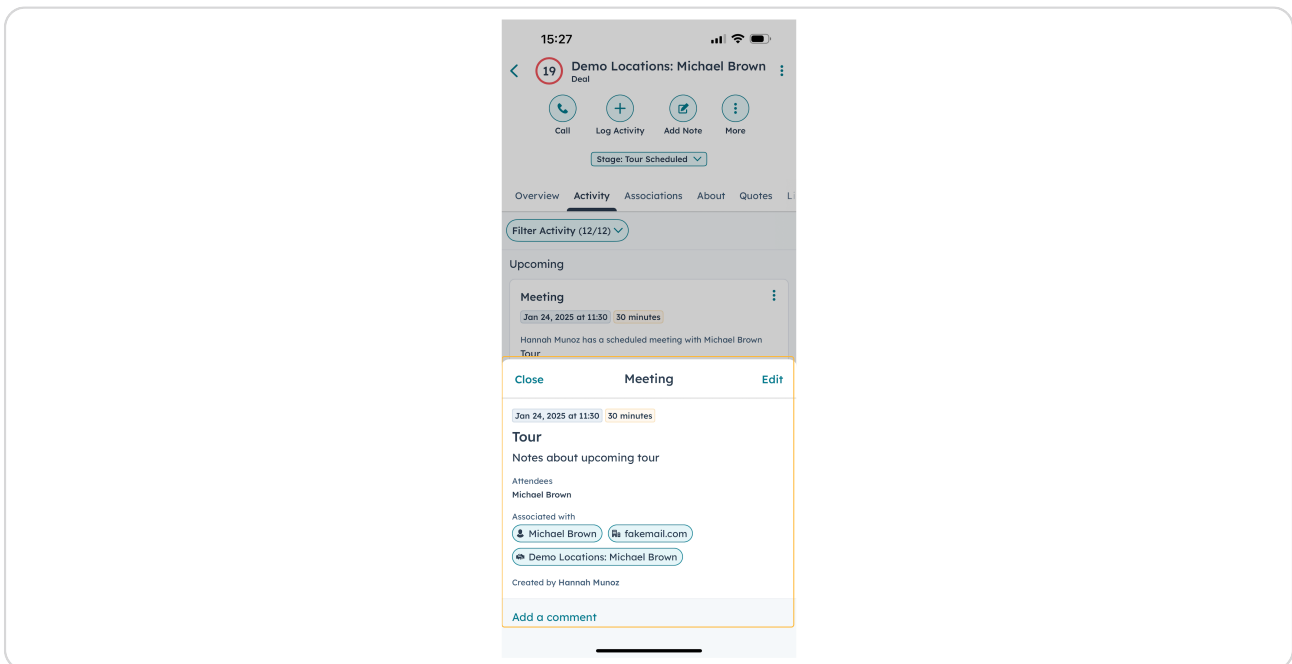
## STEP 55

In the Activity tab, you'll see the Tour



## STEP 56

If you Click on the Tour Activity, you will see all the details of the Tour



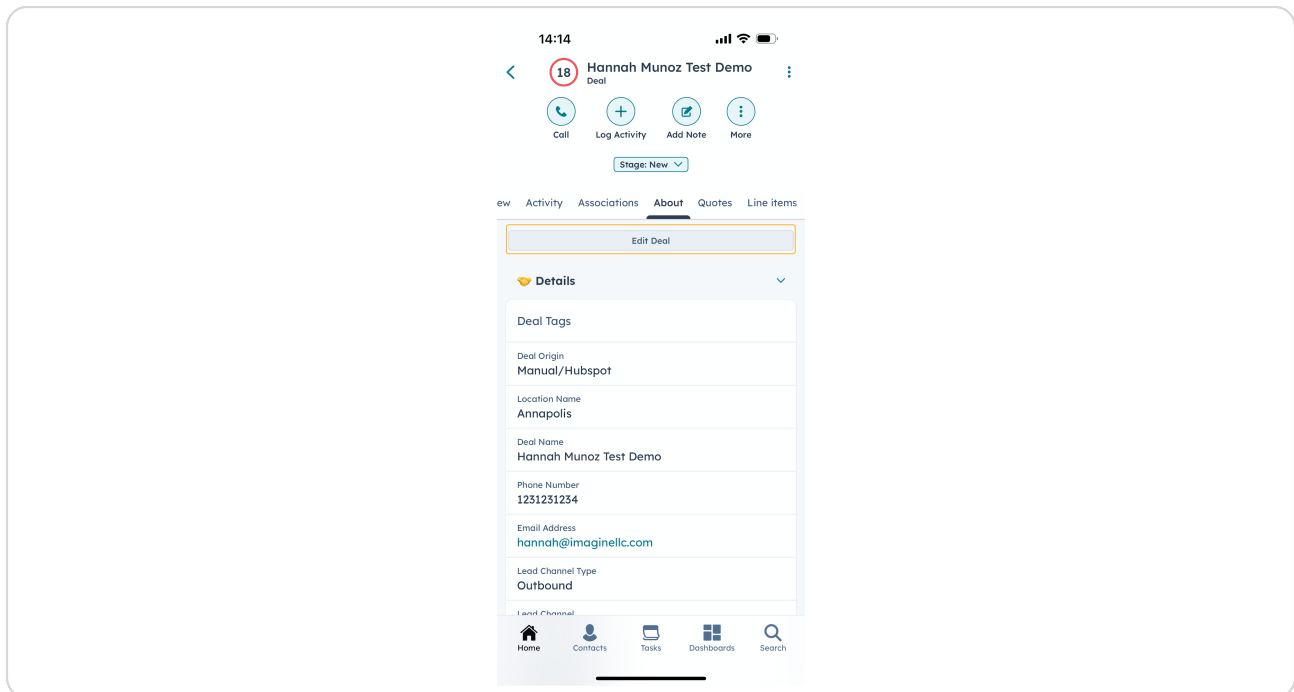
# # Scheduling a Tour Without Sending an Invite

9 Steps

If you have already scheduled a Tour or do not want to send an invite to the Pro, there is a way for you to keep your Deal updated without being on the desktop.

## STEP 57

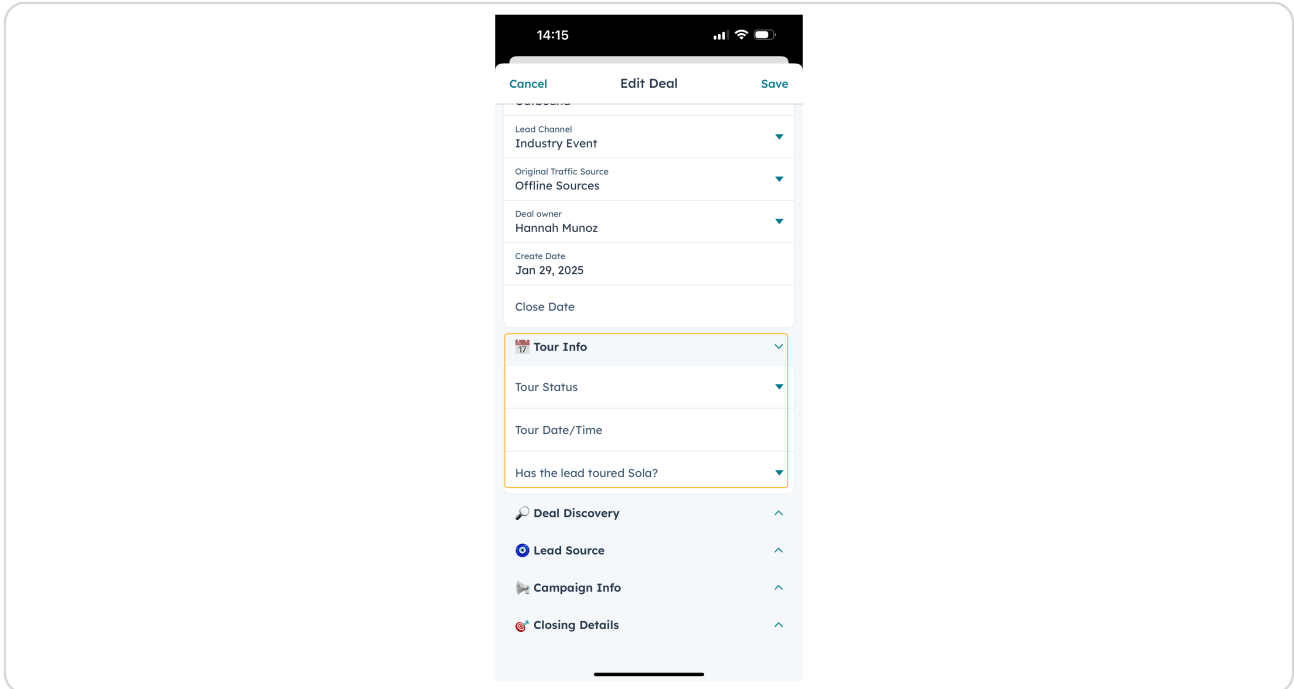
### On the About tab of the Deal, Click Edit Deal



## STEP 58

### Scroll to Tour Info

Note: If the section is not already open, click on the arrow next to the section and it will open.



## STEP 59

### Update Tour Status

14:15

Cancel Edit Deal Save

Lead Channel  
Industry Event

Original Traffic Source  
Offline Sources

Deal owner  
Hannah Munoz

Create Date  
Jan 29, 2025

Close Date

**Tour Info**

Tour Status  
Scheduled

Tour Date/Time

Has the lead toured Sold?

Deal Discovery

Lead Source

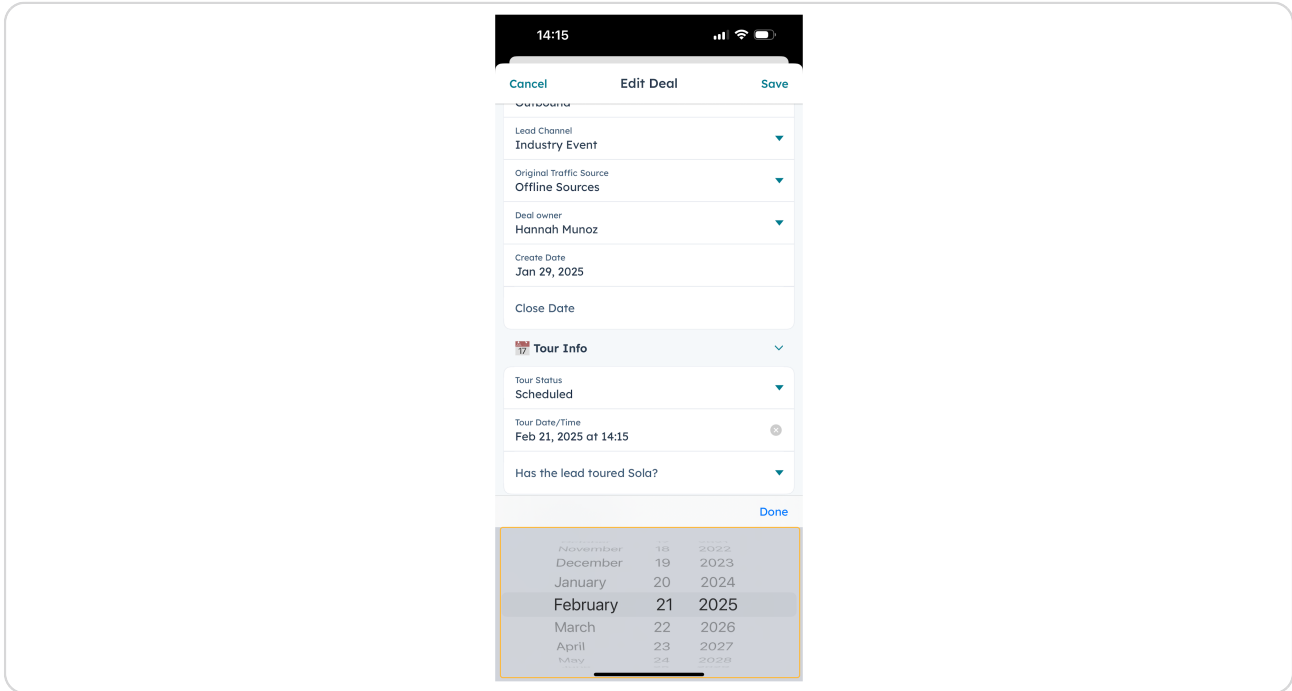
Campaign Info

Closing Details

## STEP 60

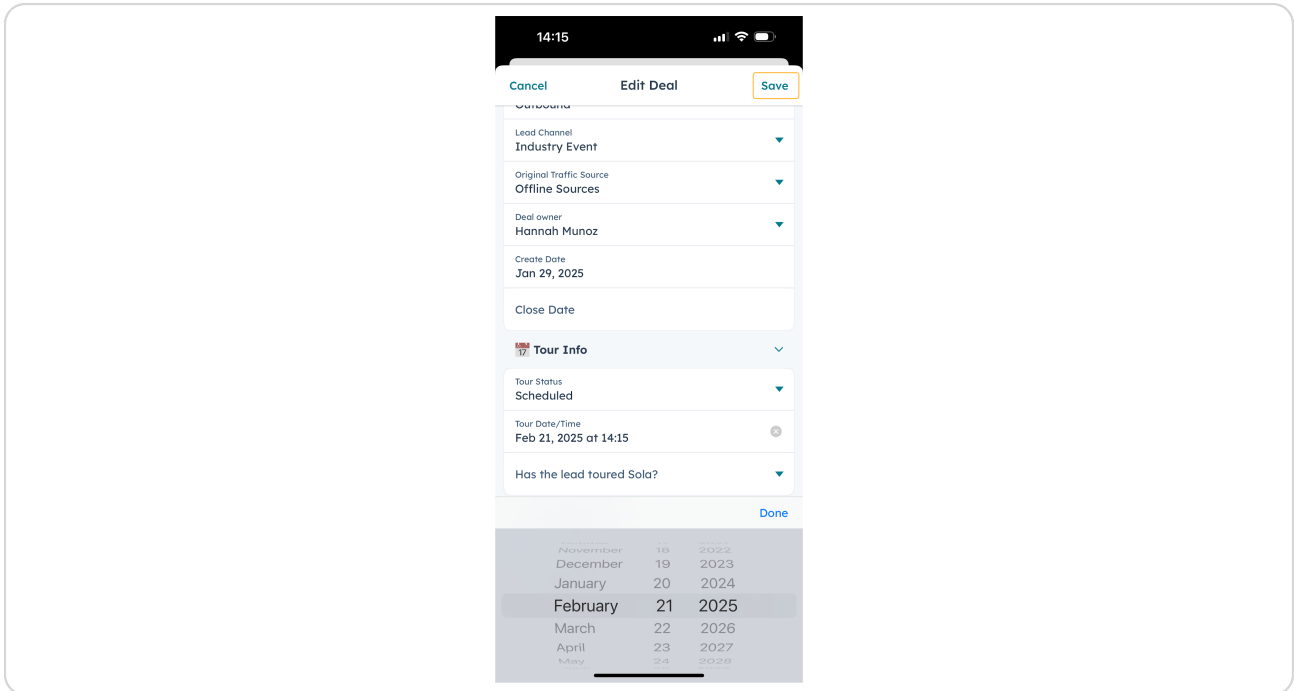
### Update Date/Time

Note: The time will automatically default to the current time. Ignore this.



## STEP 61

Click Save



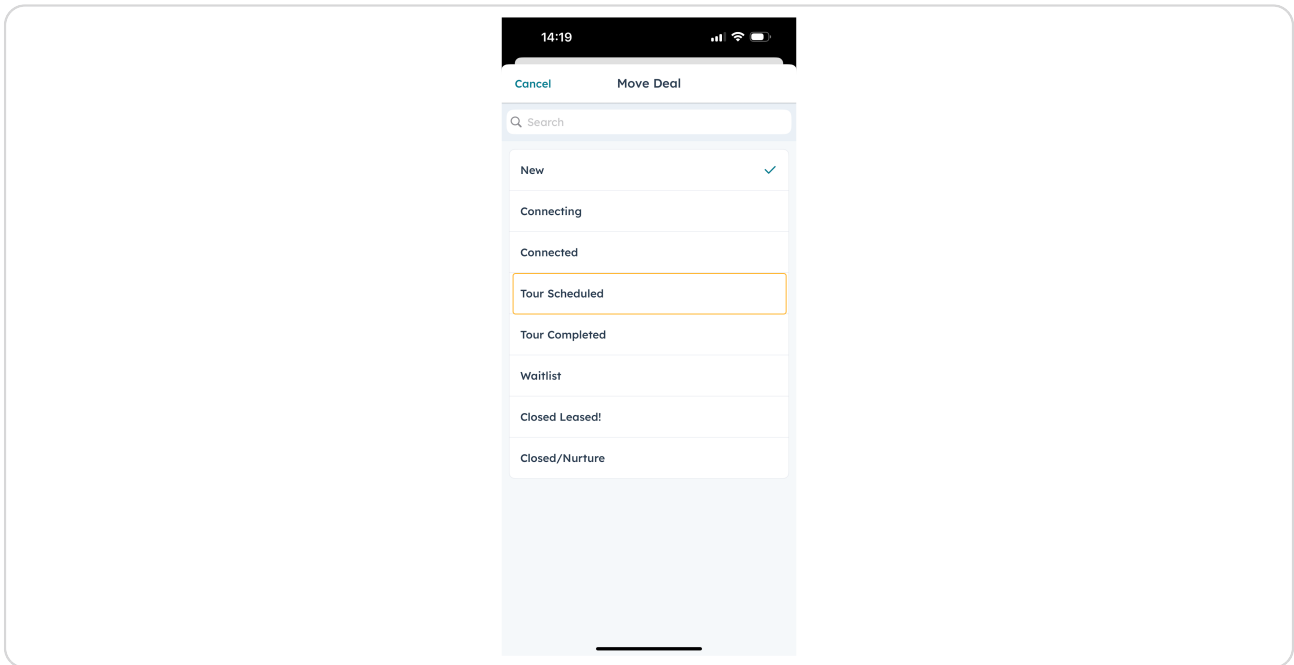
## STEP 62

You will need to update the Deal Stage. Click the Stage dropdown



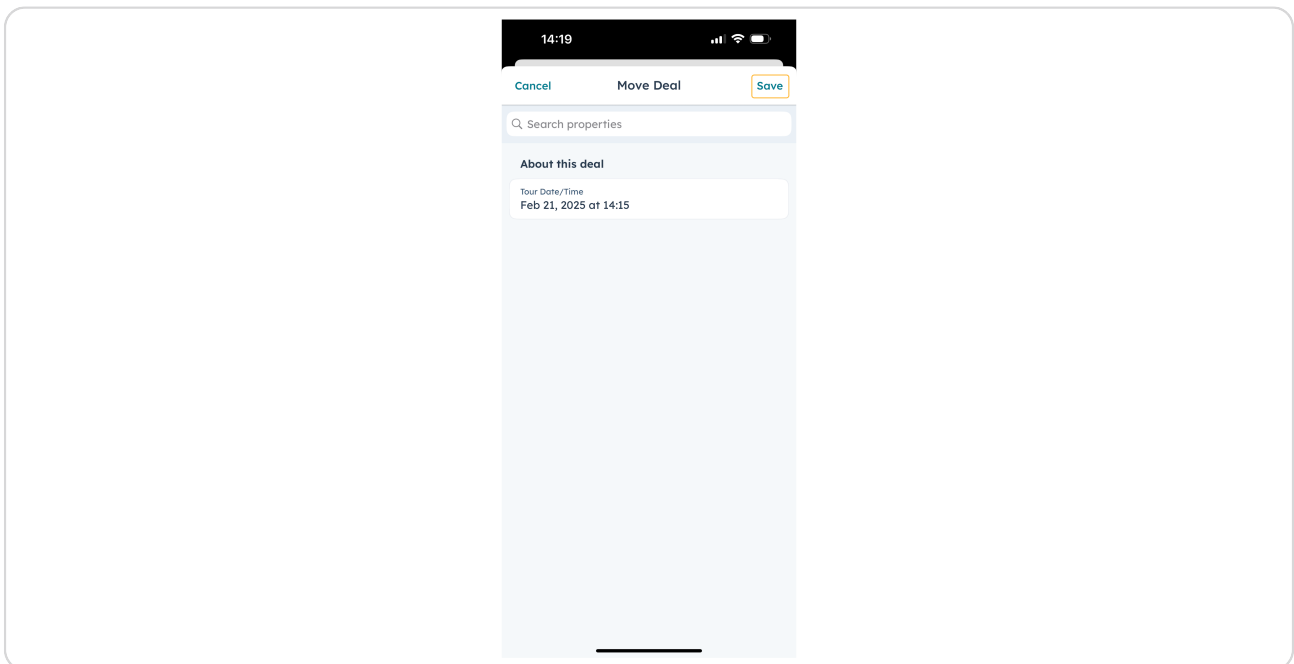
## STEP 63

### Click Tour Scheduled



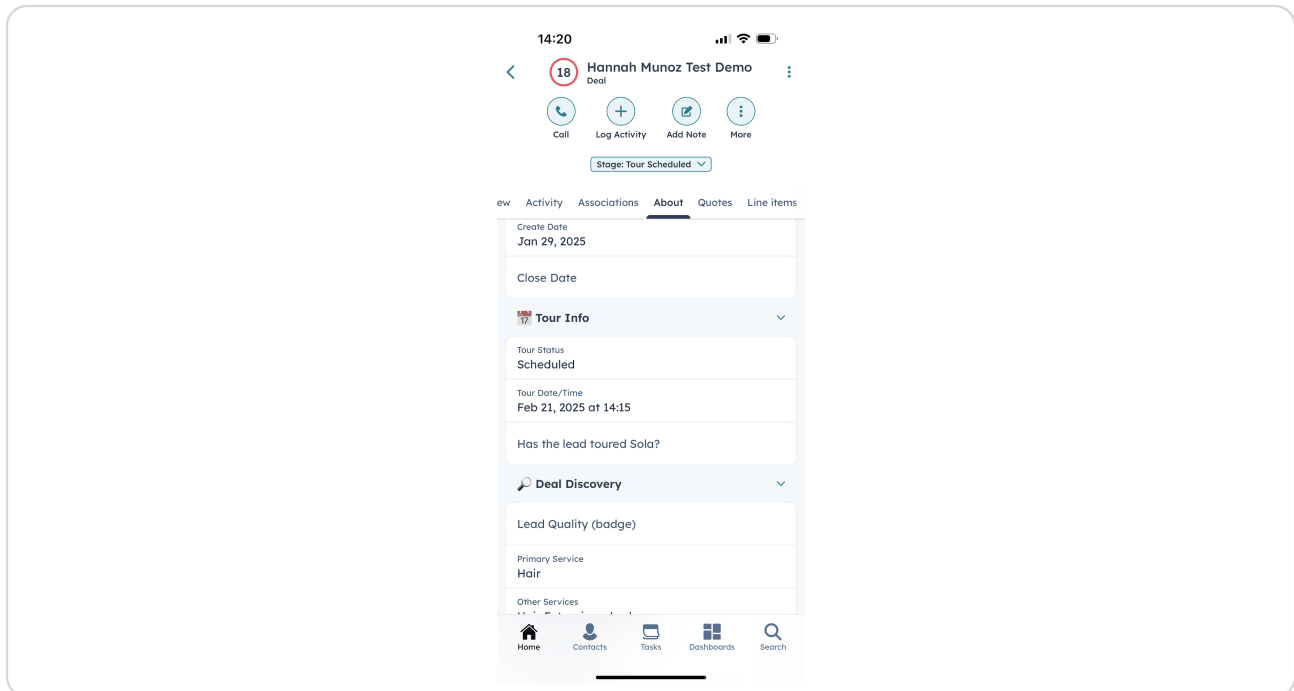
## STEP 64

### Make sure the Tour Date/Time is correct and filled in and Click Save



## STEP 65

### Your Deal will be updated



## # Switching Pipelines

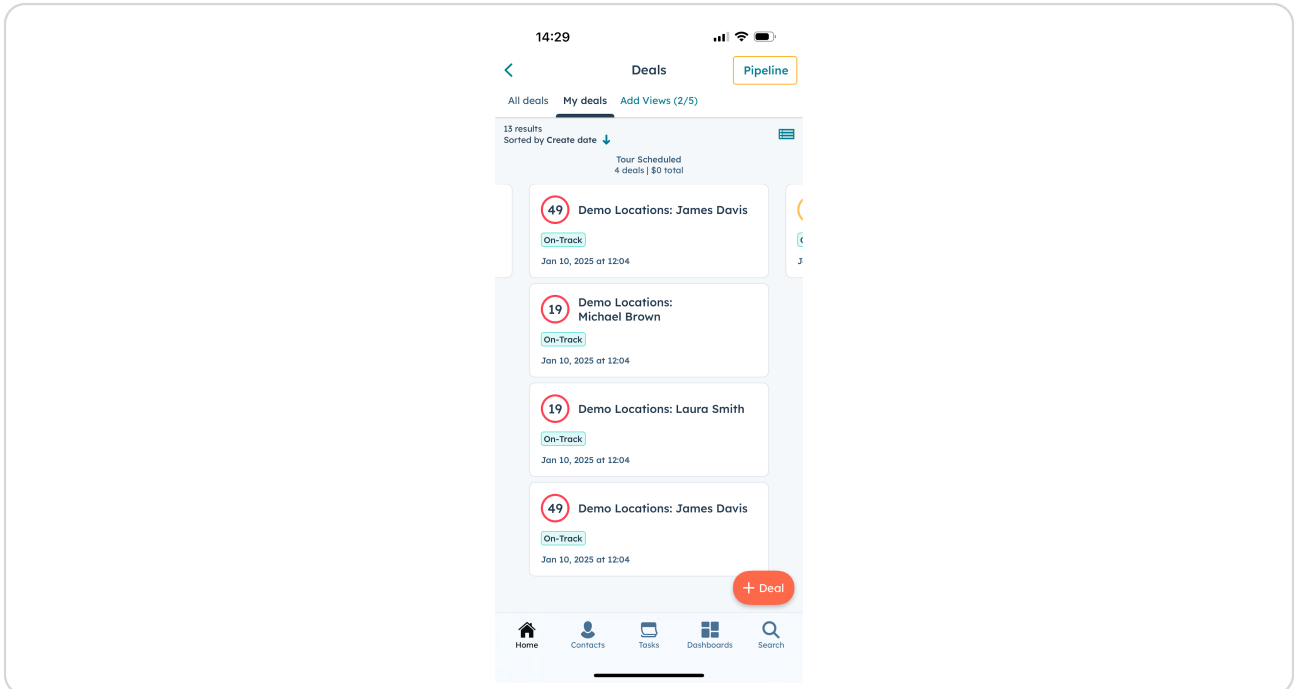
3 Steps

If you need to switch back and forth from the Leasing Pipeline to the Nurture Pipeline, follow these steps.

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## STEP 66

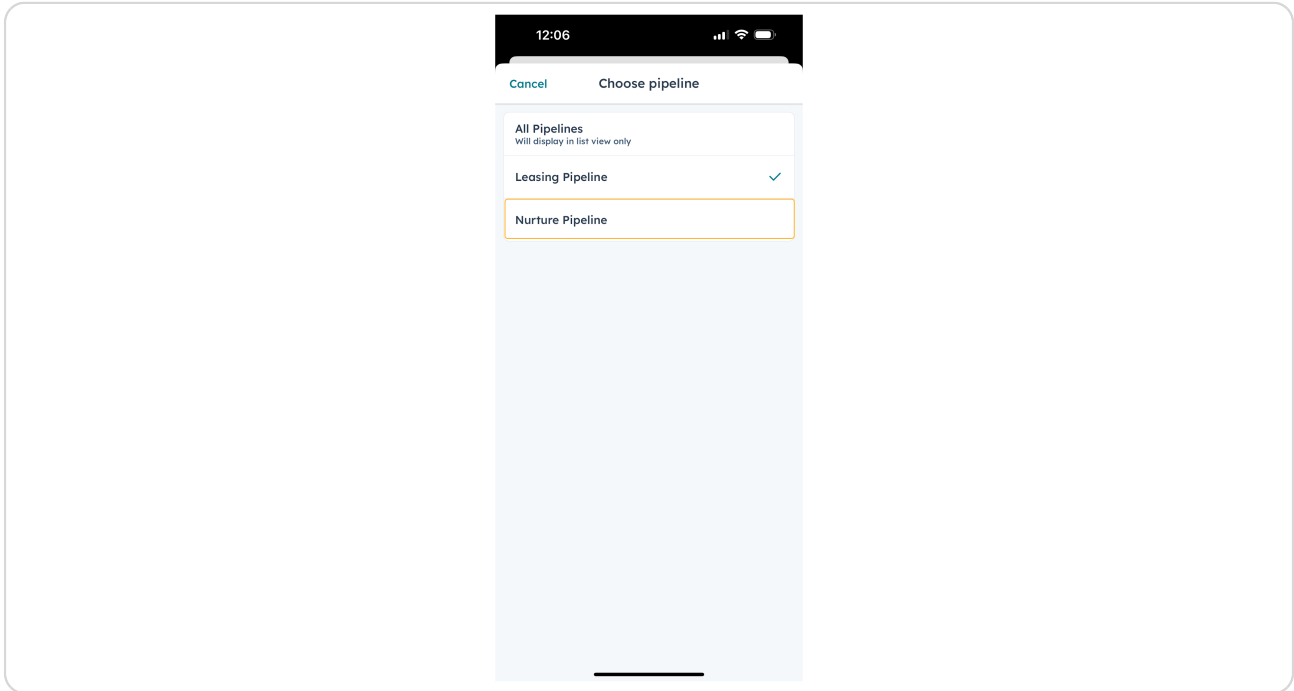
In the Deal Overview, Click Pipeline in the top right-hand corner



## STEP 67

### Click Nurture Pipeline

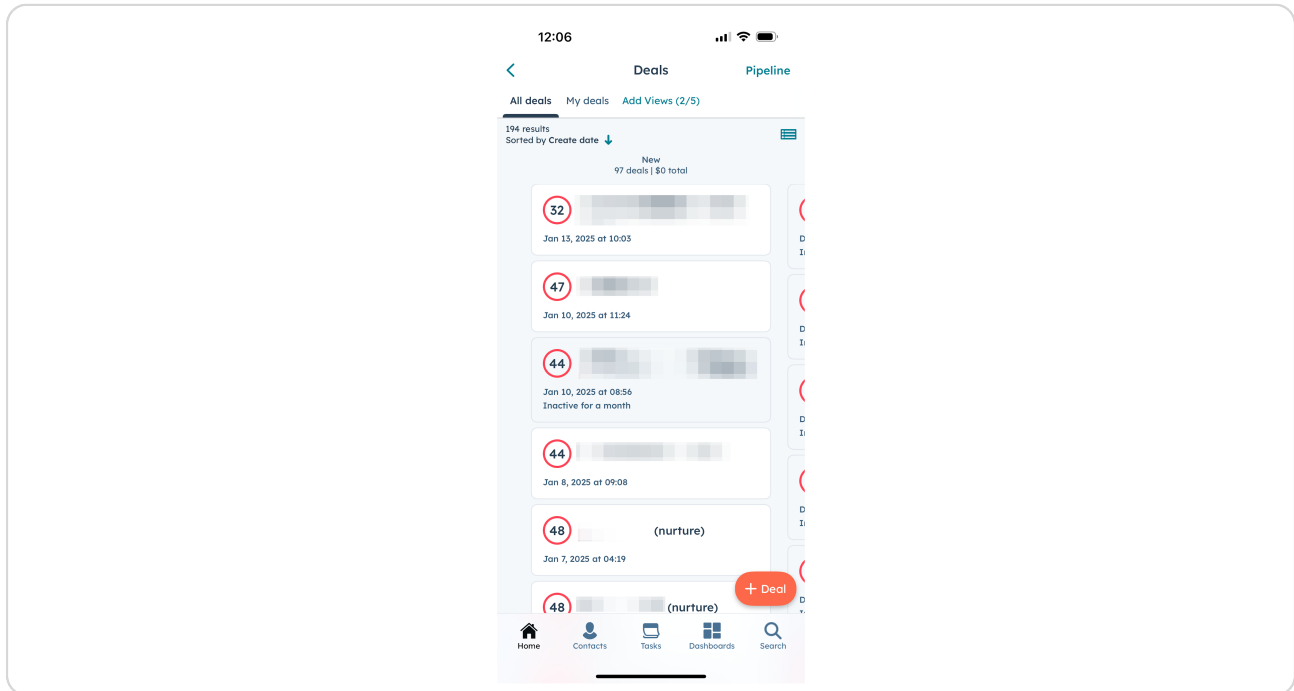
Note: There will be a check mark next to the pipeline you are currently viewing.



## STEP 68

### The Pipeline will be switched

The Deal Names have been blurred for confidentiality reasons.



## # Accessing Dashboards

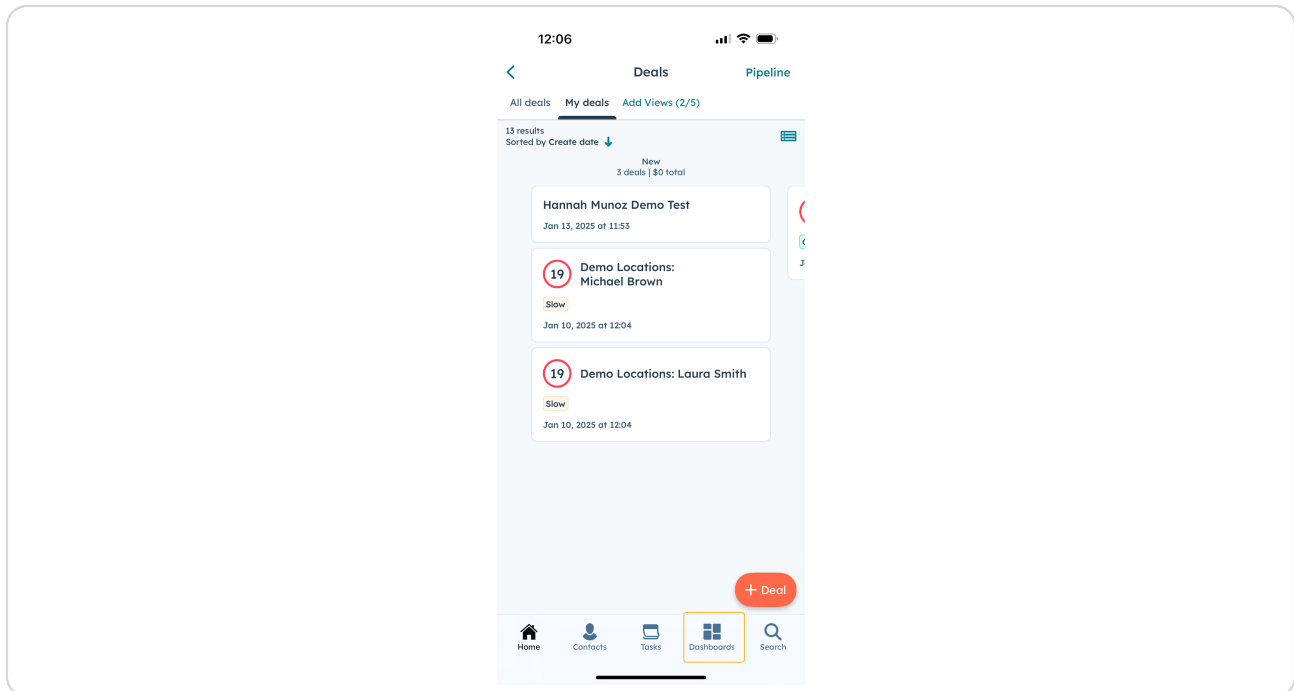
4 Steps

If you need to review any data or dashboards while you're on the go, follow these steps.

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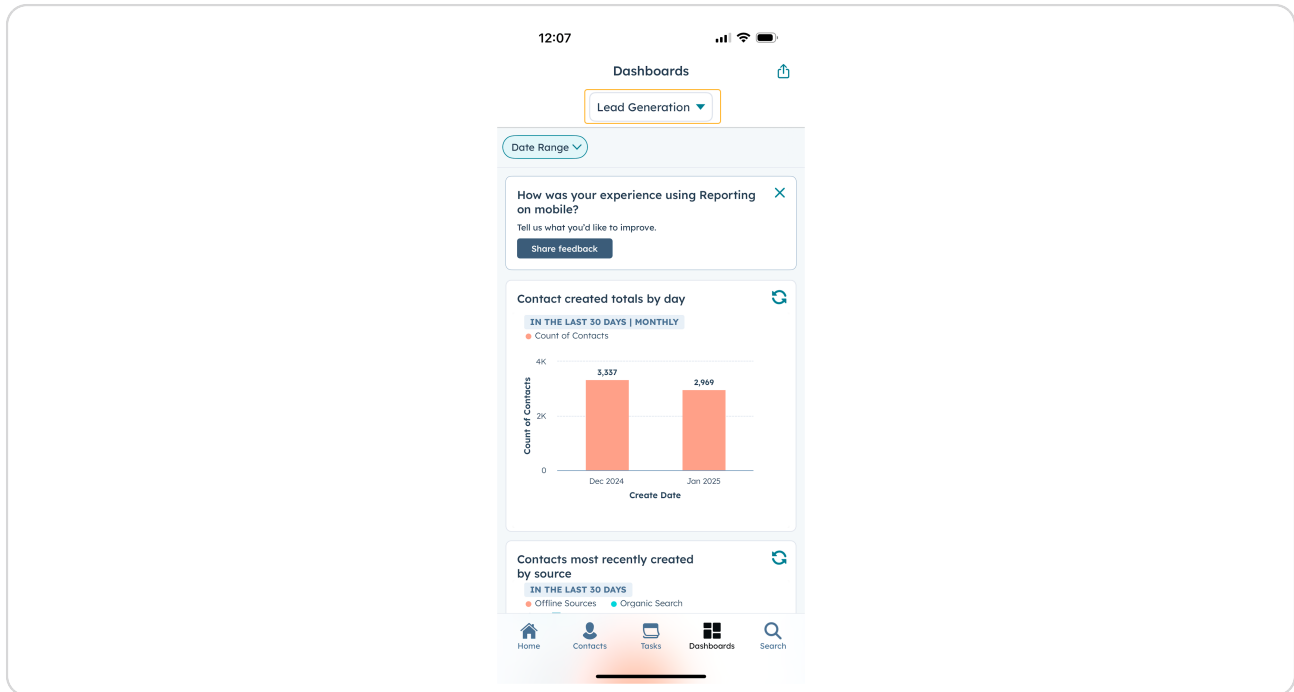
## STEP 69

On any screen in the App, Click the Dashboards button



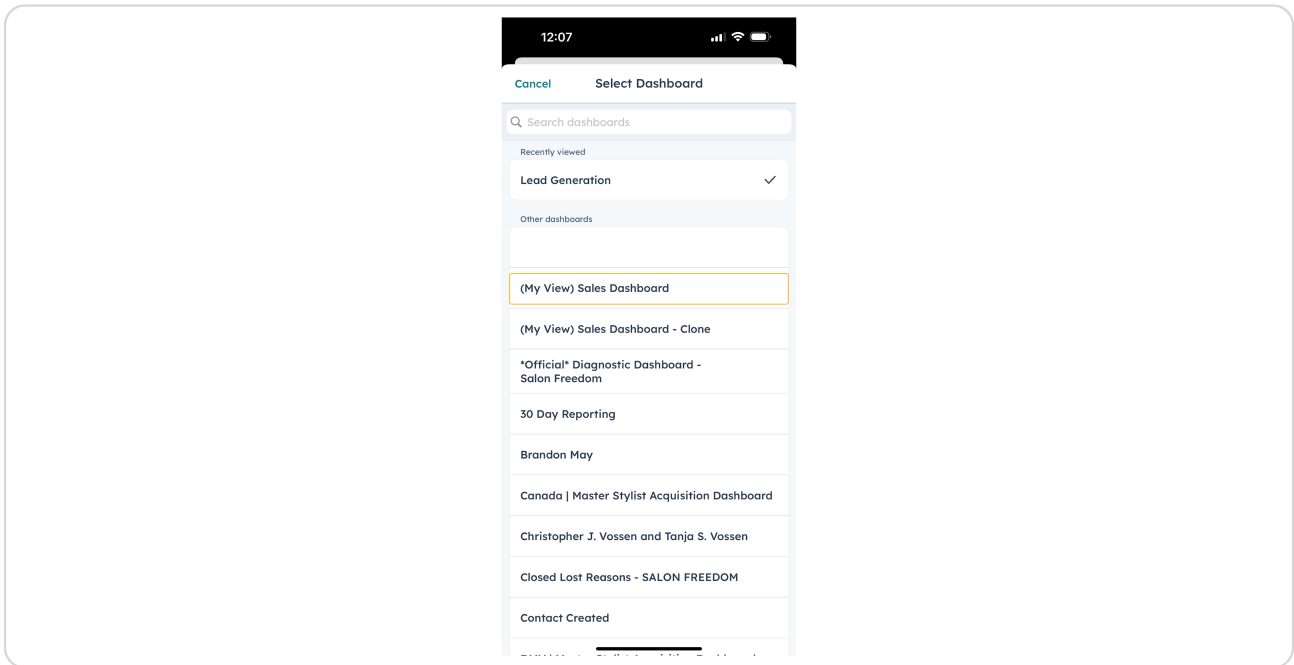
## STEP 70

You'll be taken to the Dashboards. To change the Dashboard, Click the dropdown at the top of the screen



## STEP 71

### Select the Dashboard you want to view



## STEP 72

### The Dashboard will switch

