


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.

34 Steps [View most recent version](#) 

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Open up the HubSpot Mobile App

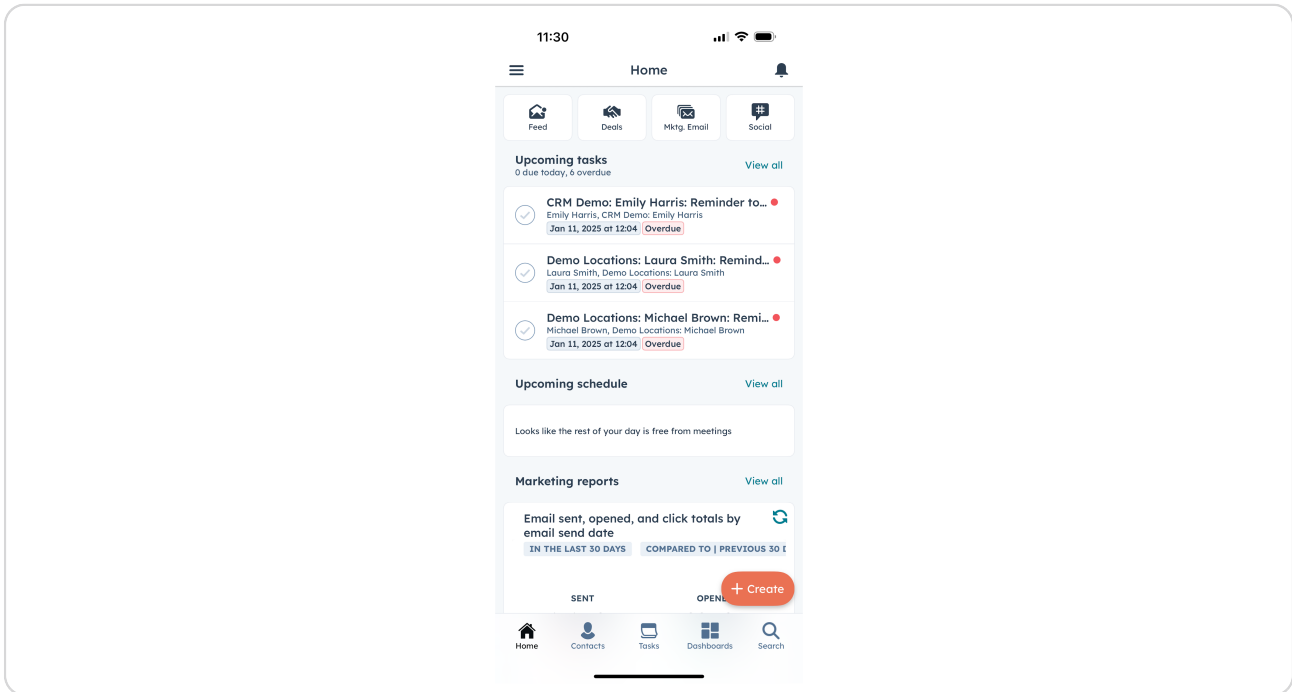
1 Step

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.

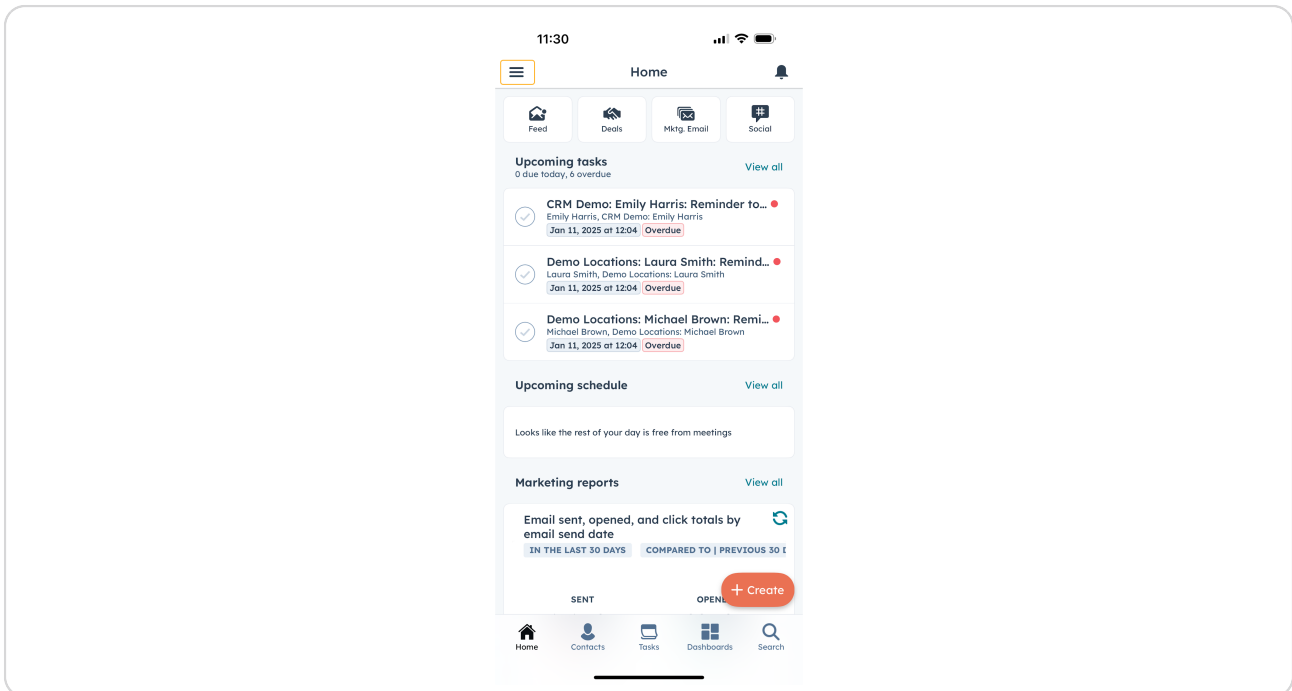


How to Access the App's Navigation

3 Steps

STEP 2

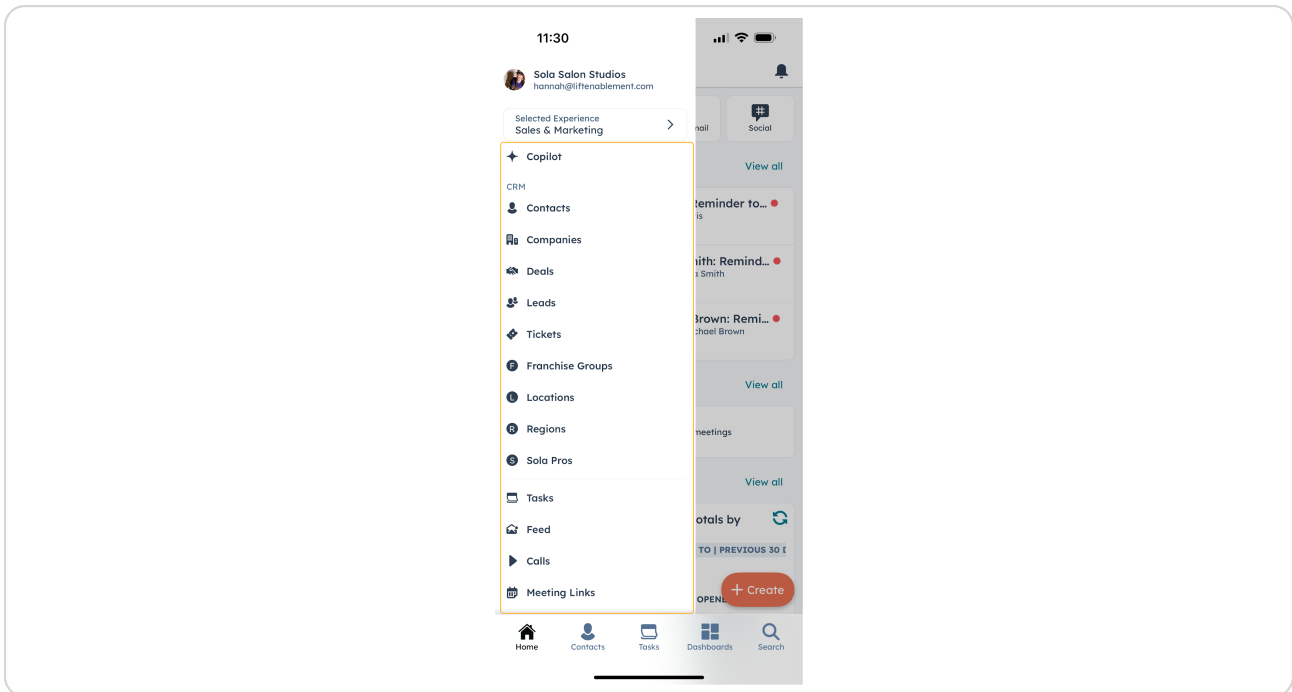
Click on the Hamburger menu in the top left-hand corner



STEP 3

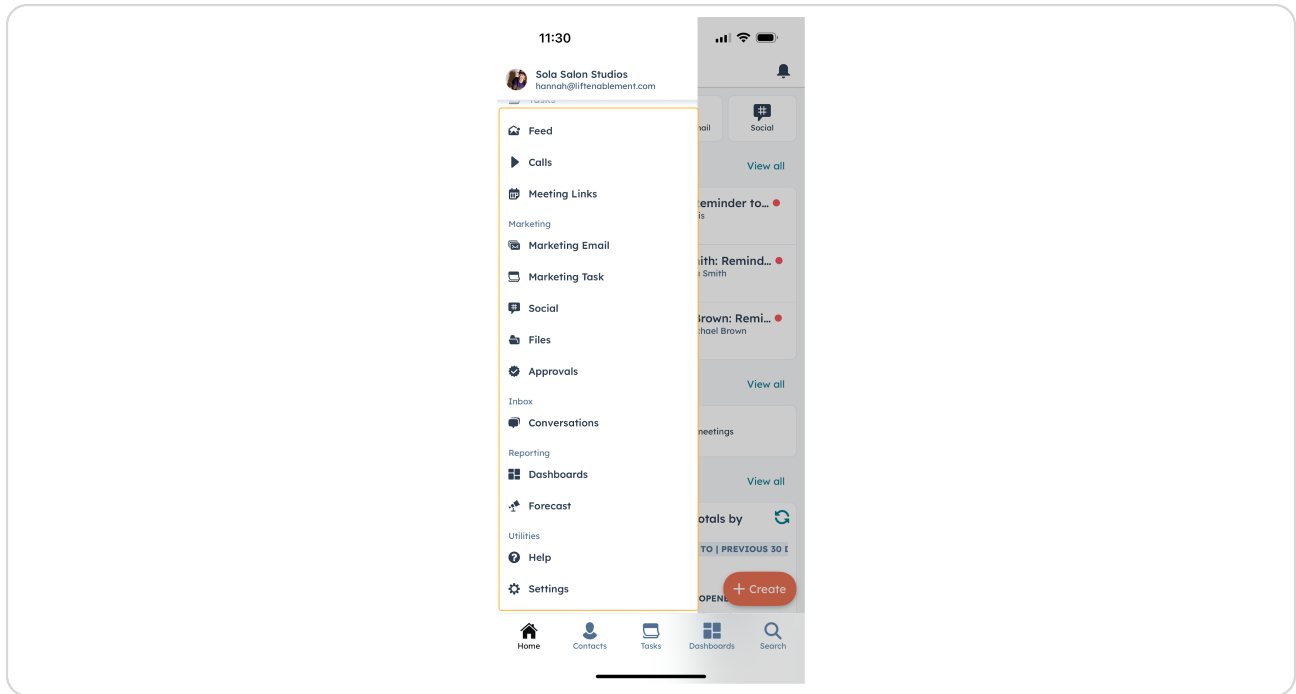
This will take you to the app's navigation

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.



STEP 4

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

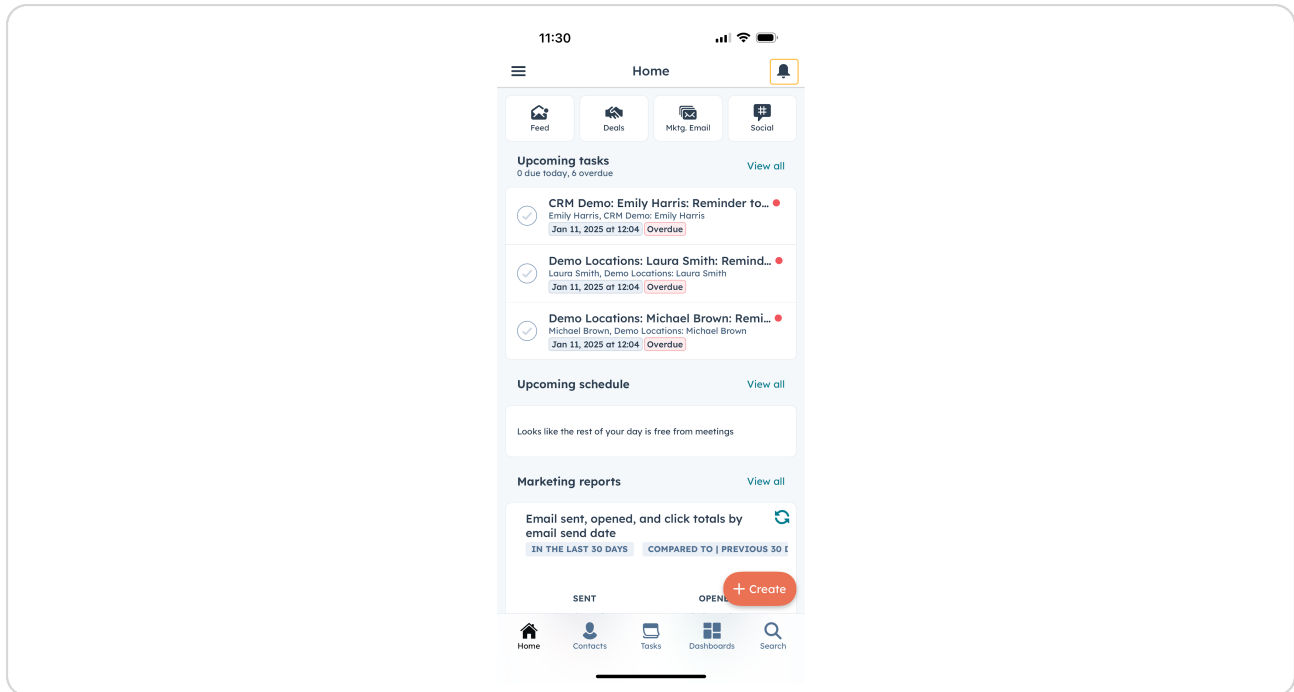


How to Update Notifications

6 Steps

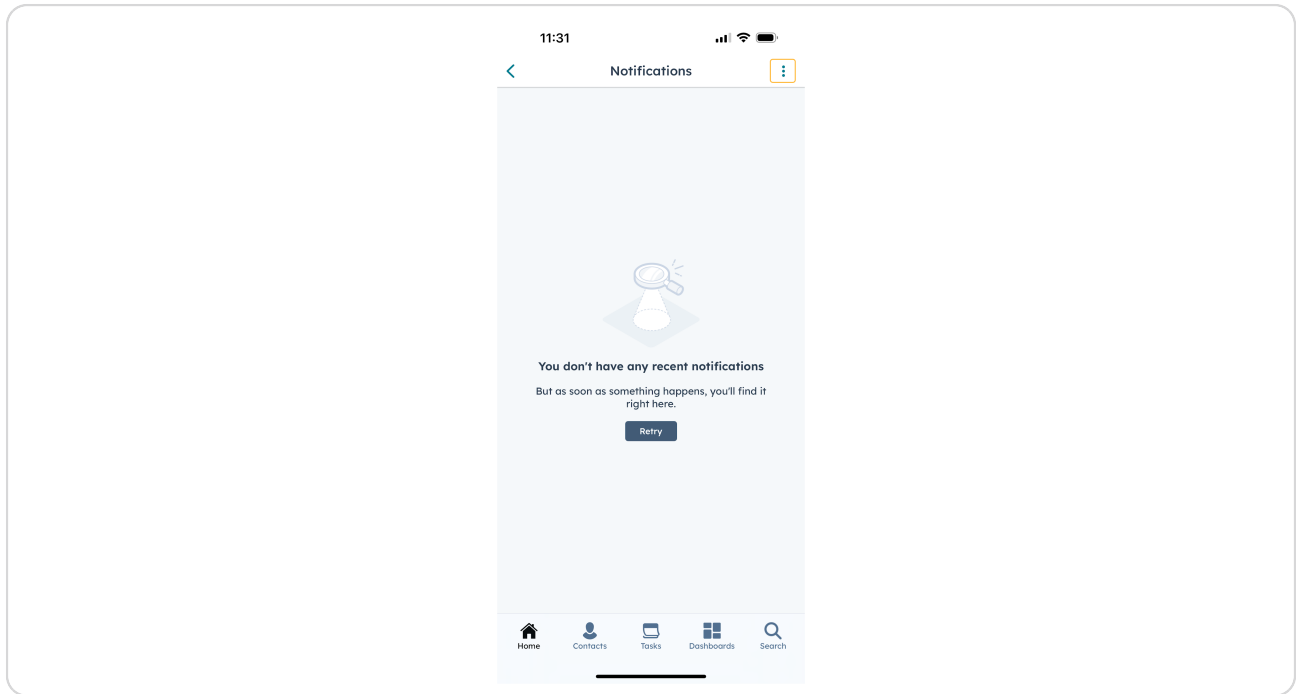
STEP 5

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



STEP 6

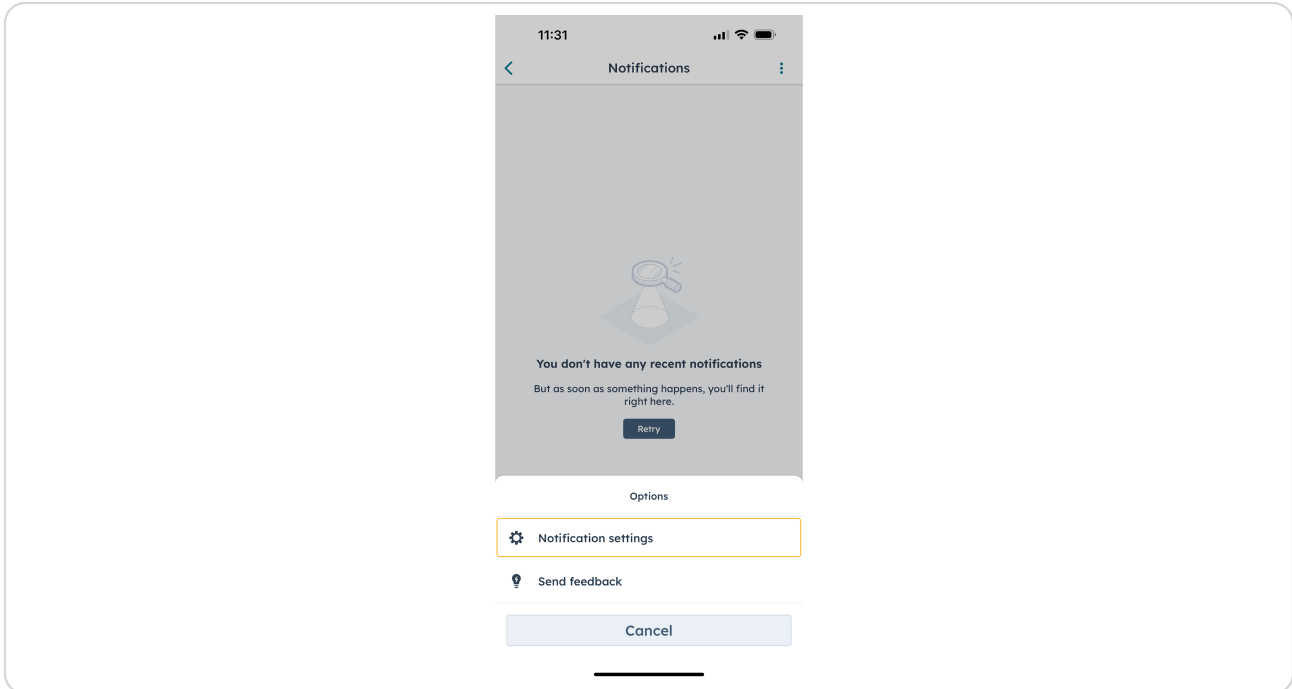
This will take you to a screen that will show you any recent notifications. Click on the 3 dots in the top right-hand corner



STEP 7

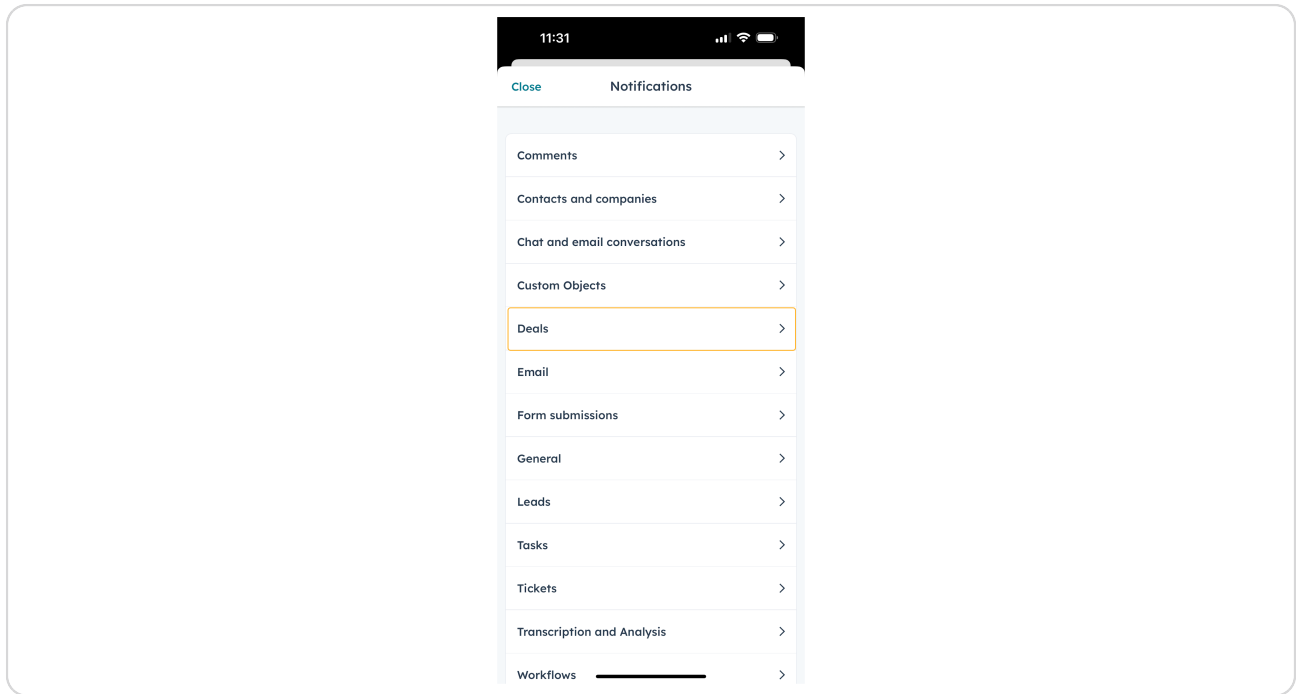
Click on Notification settings

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.



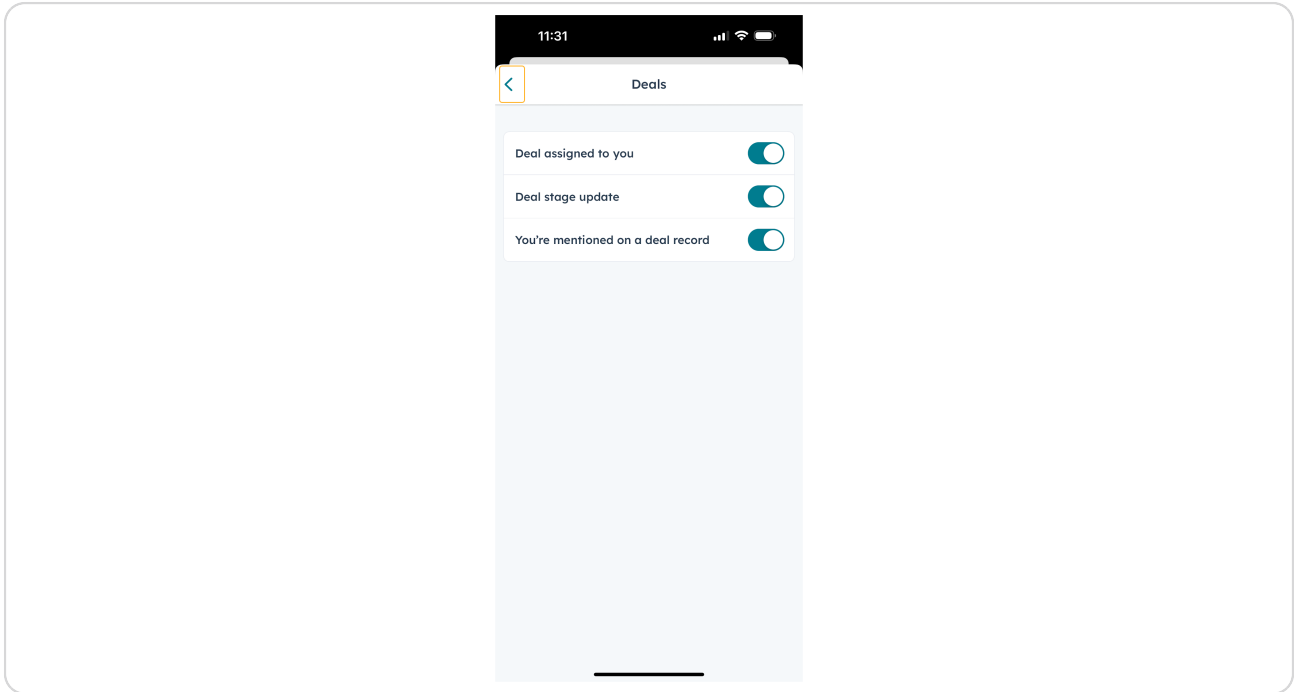
STEP 8

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



STEP 9

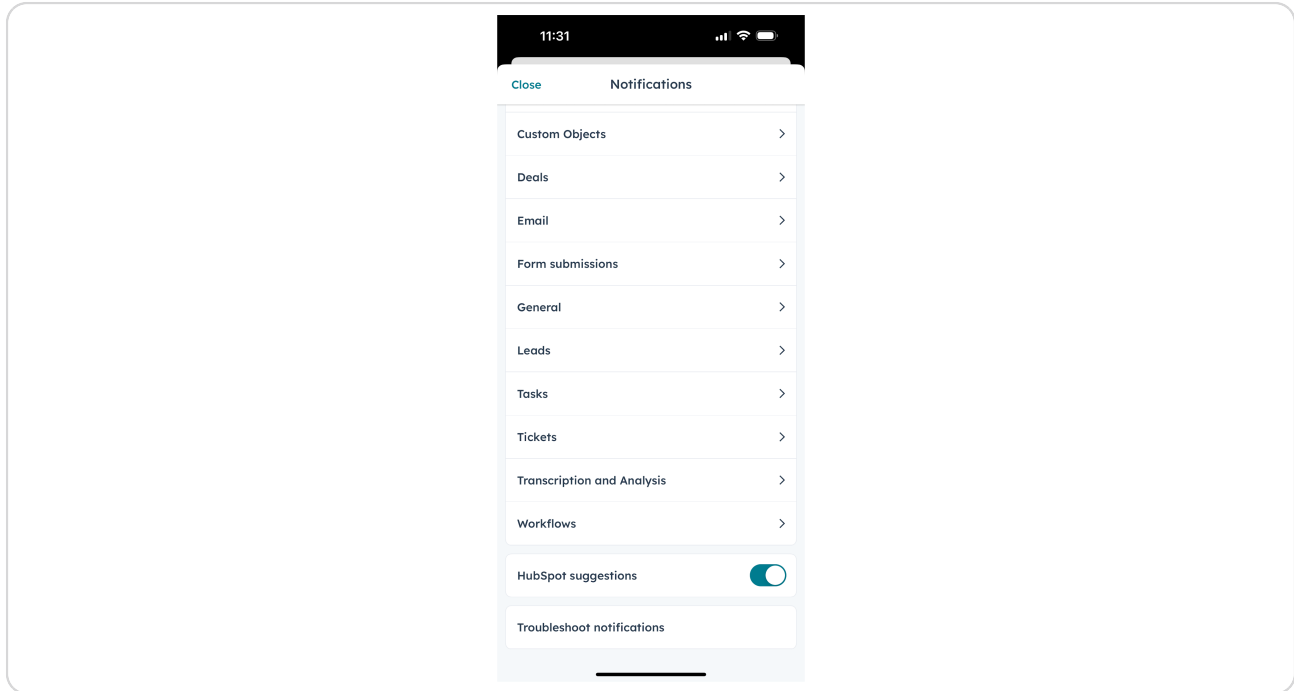
Choose what notifications you want or do not want to receive. When you are done, Click the back arrow



STEP 10

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.



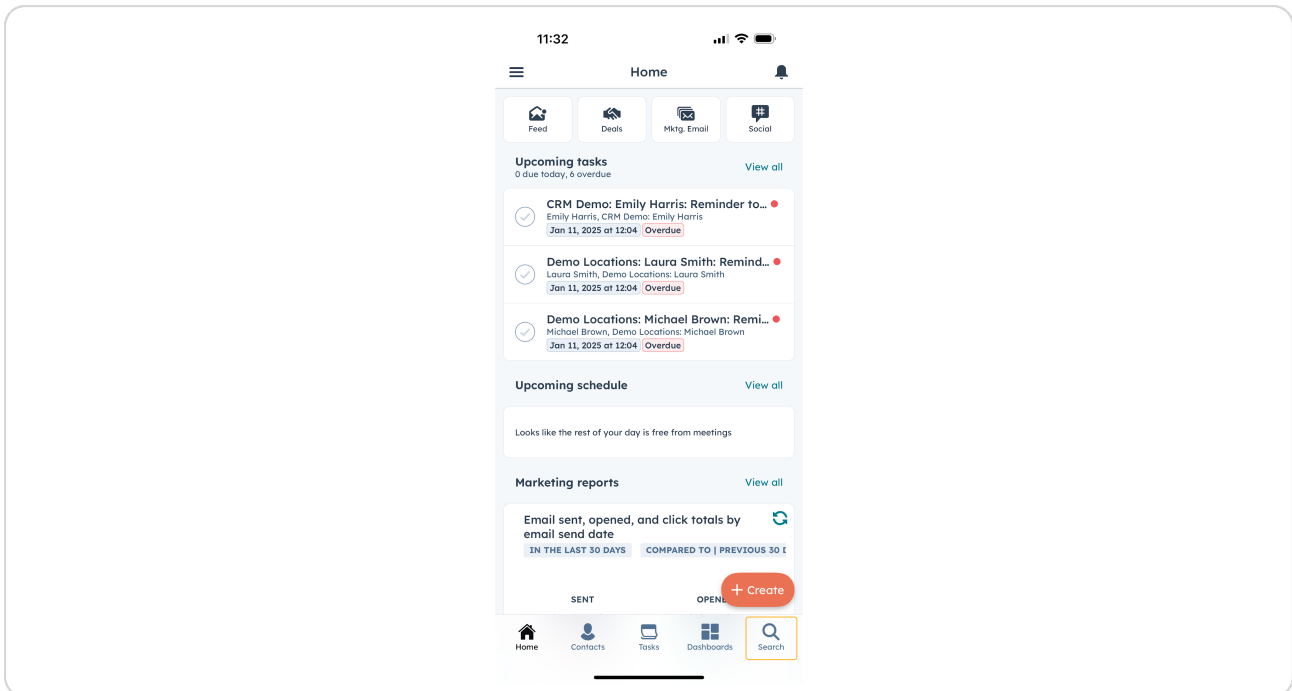
Utilizing the Search Feature

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.

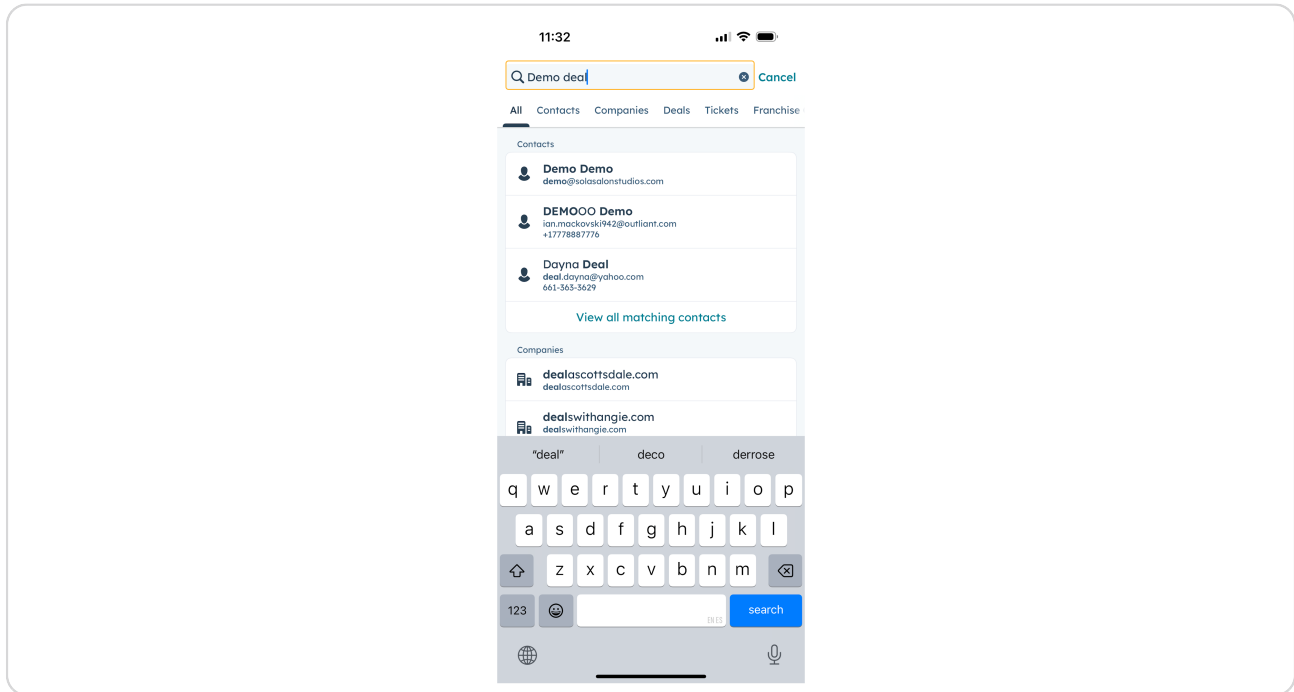
STEP 11

On any screen, Click on the Search button



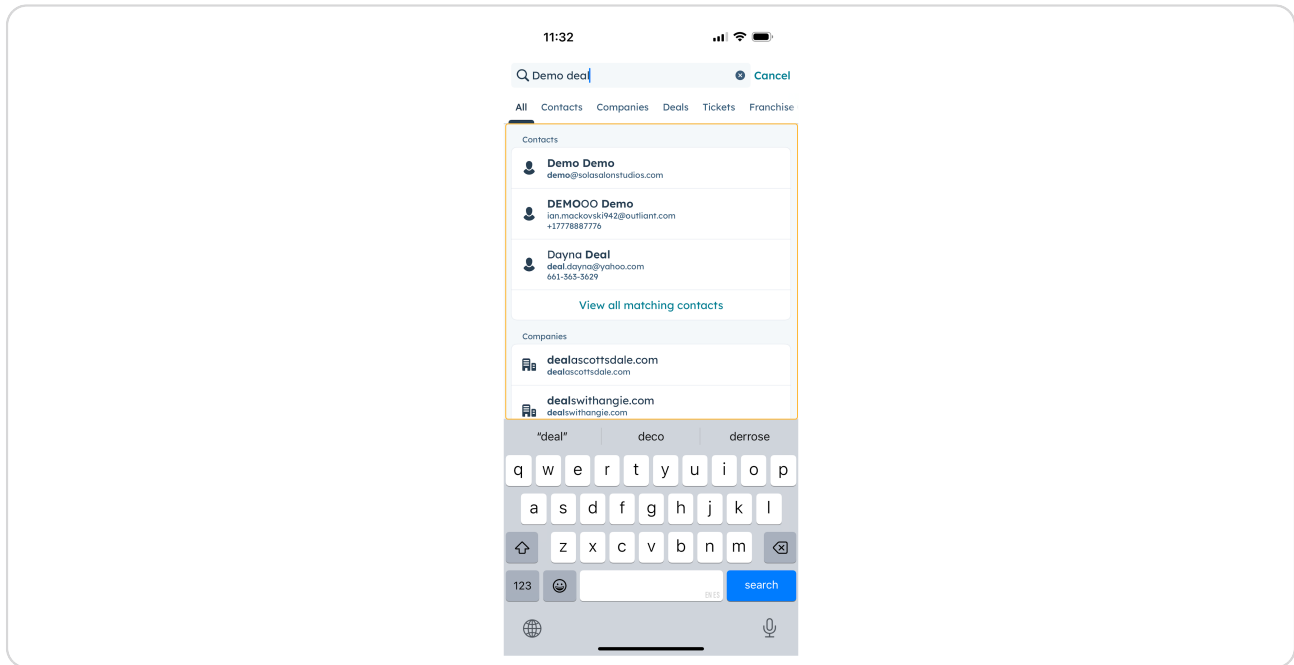
STEP 12

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



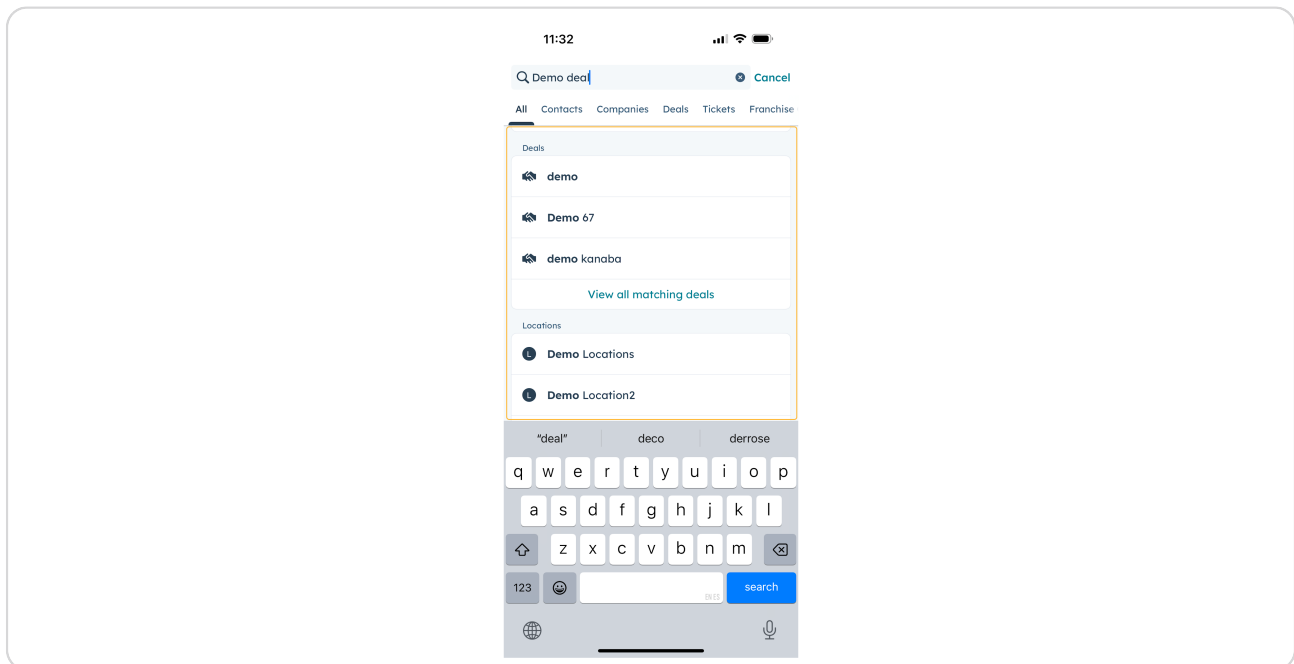
STEP 13

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



STEP 14

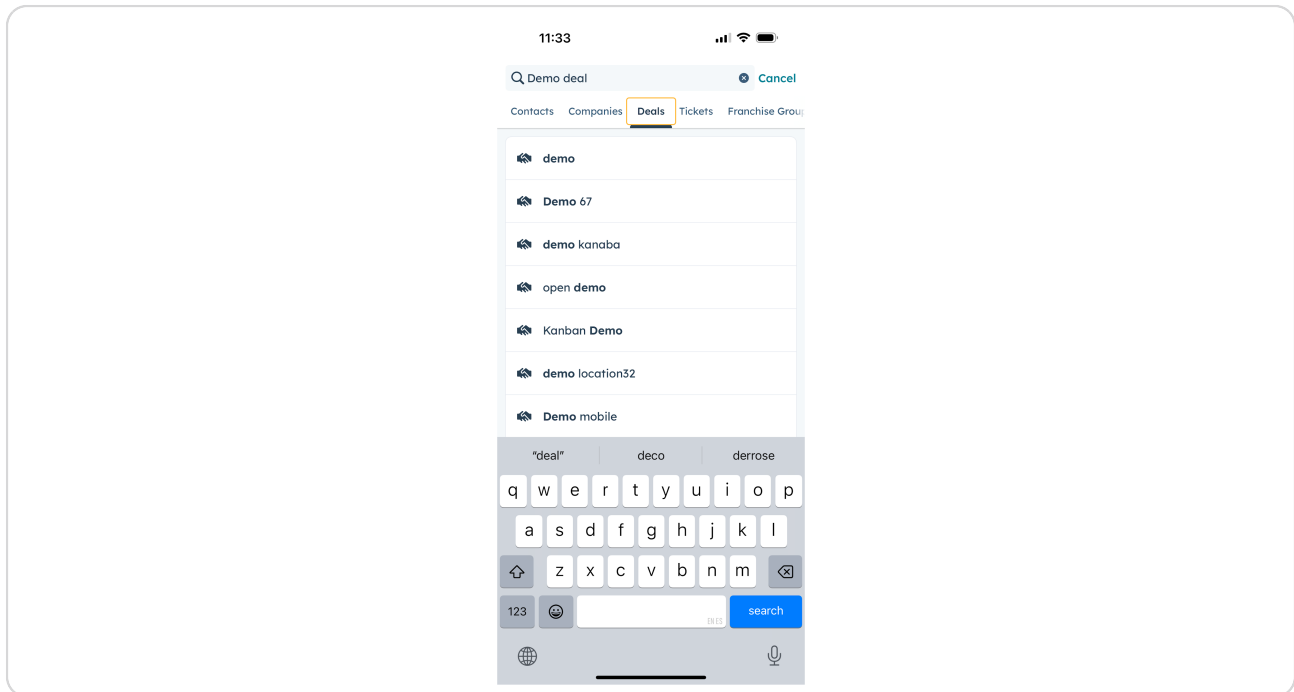
Scroll down on the All tab to see all search results



STEP 15

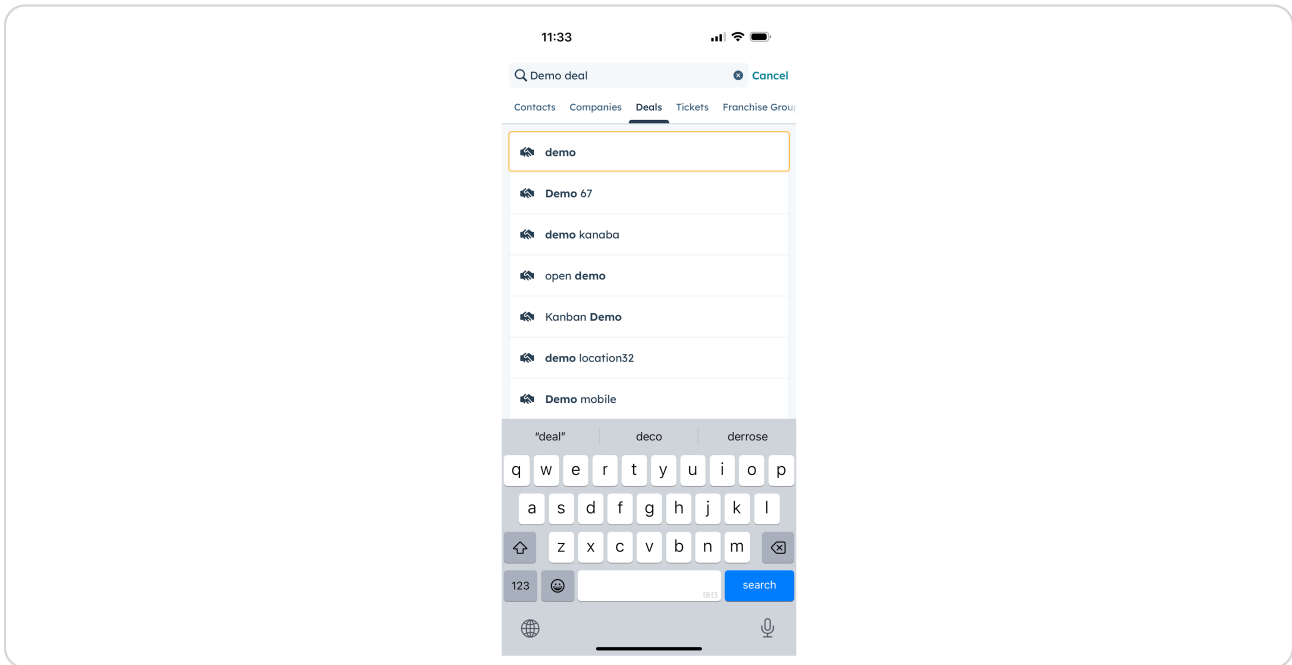
Click on a specific tab at the top to narrow down your search

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.



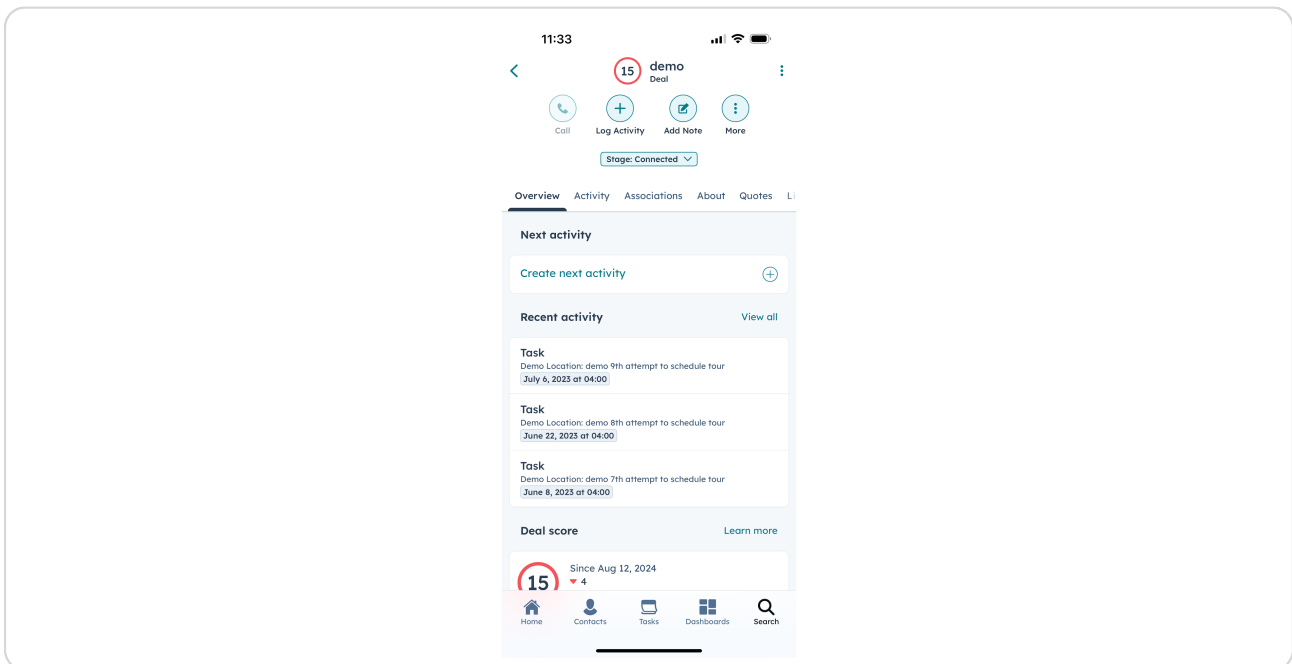
STEP 16

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



STEP 17

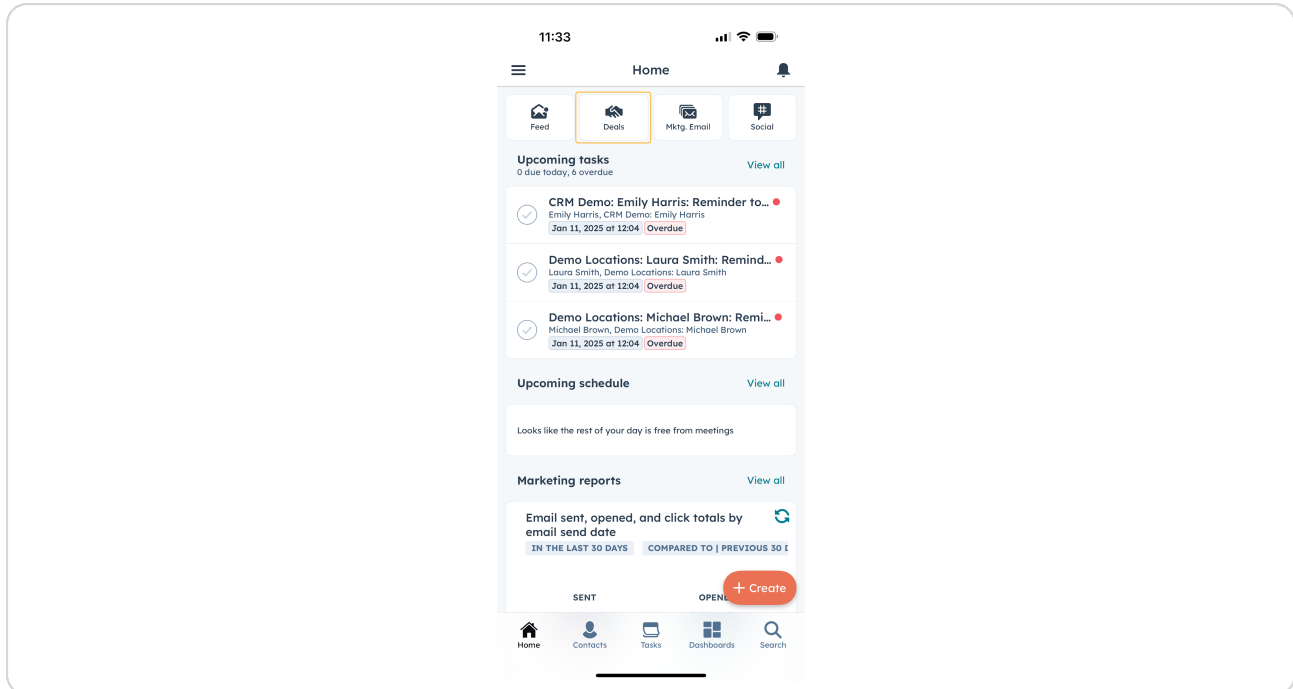
The app will take you into the record overview



STEP 18

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.

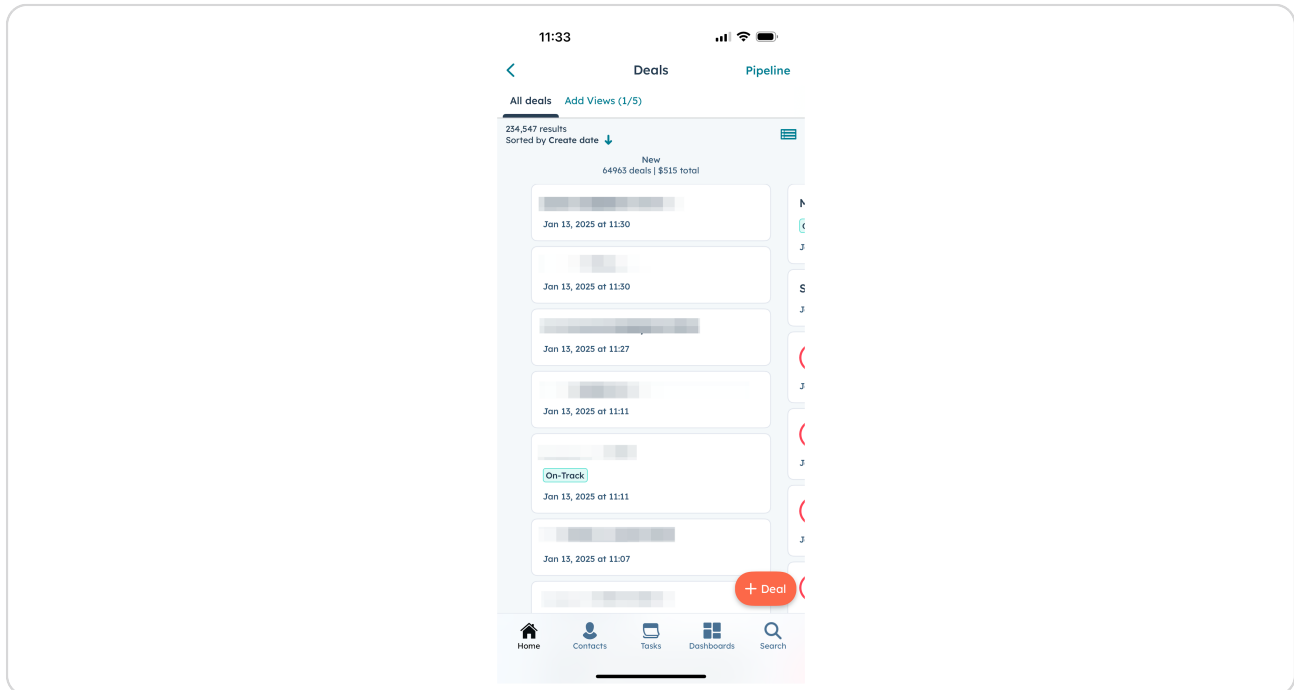


STEP 19

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

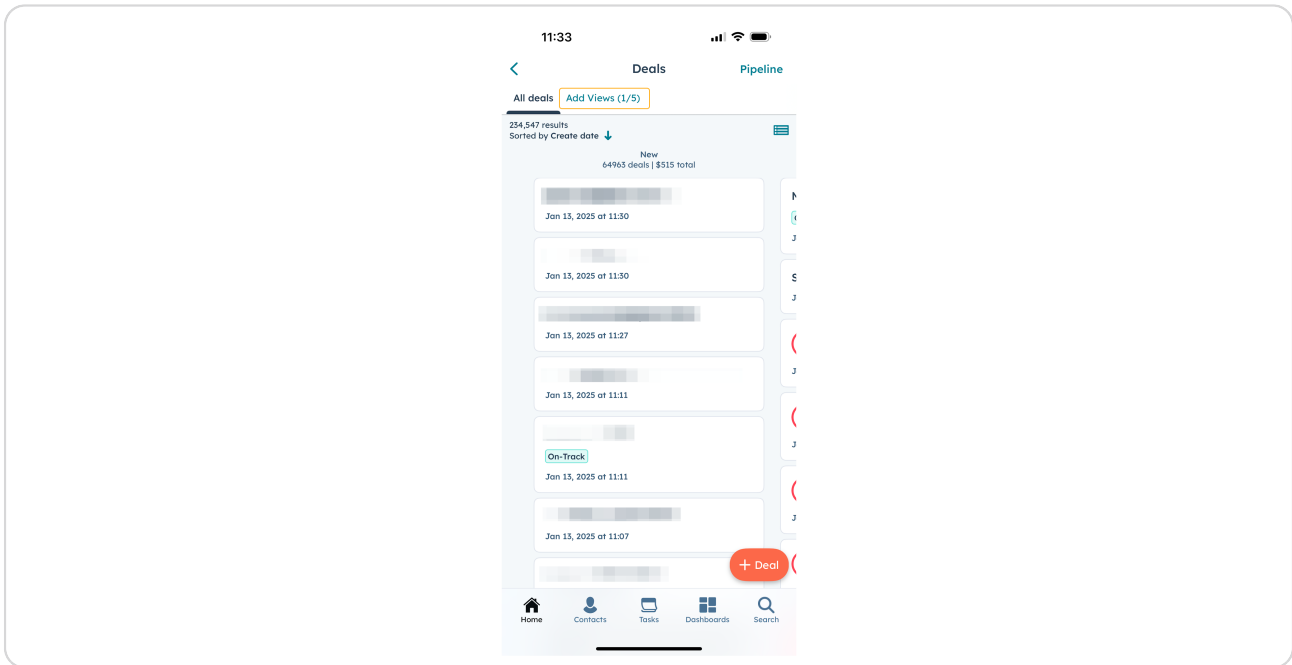
Note: The kanban view will look a little different here. The screen is sectioned off by pipeline stage and will only show one stage at a time. You can swipe over to view Deals in other stages of the pipeline.

Deal names have been blurred for confidentiality reasons.



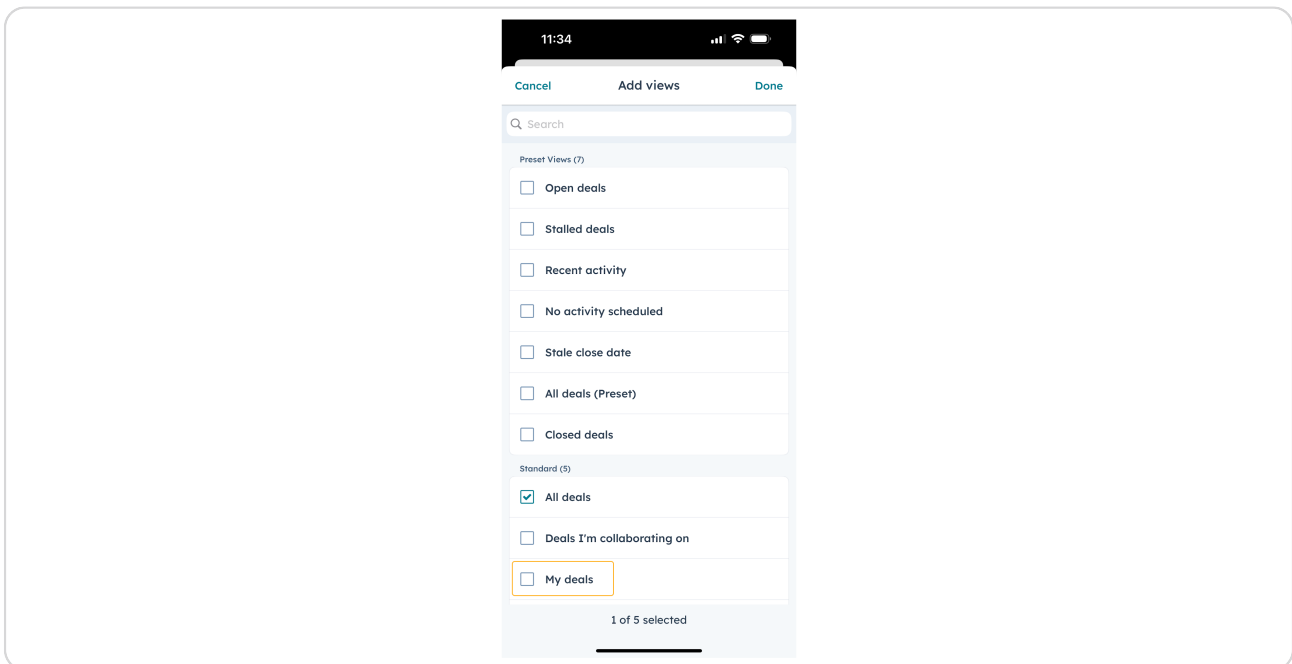
STEP 20

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



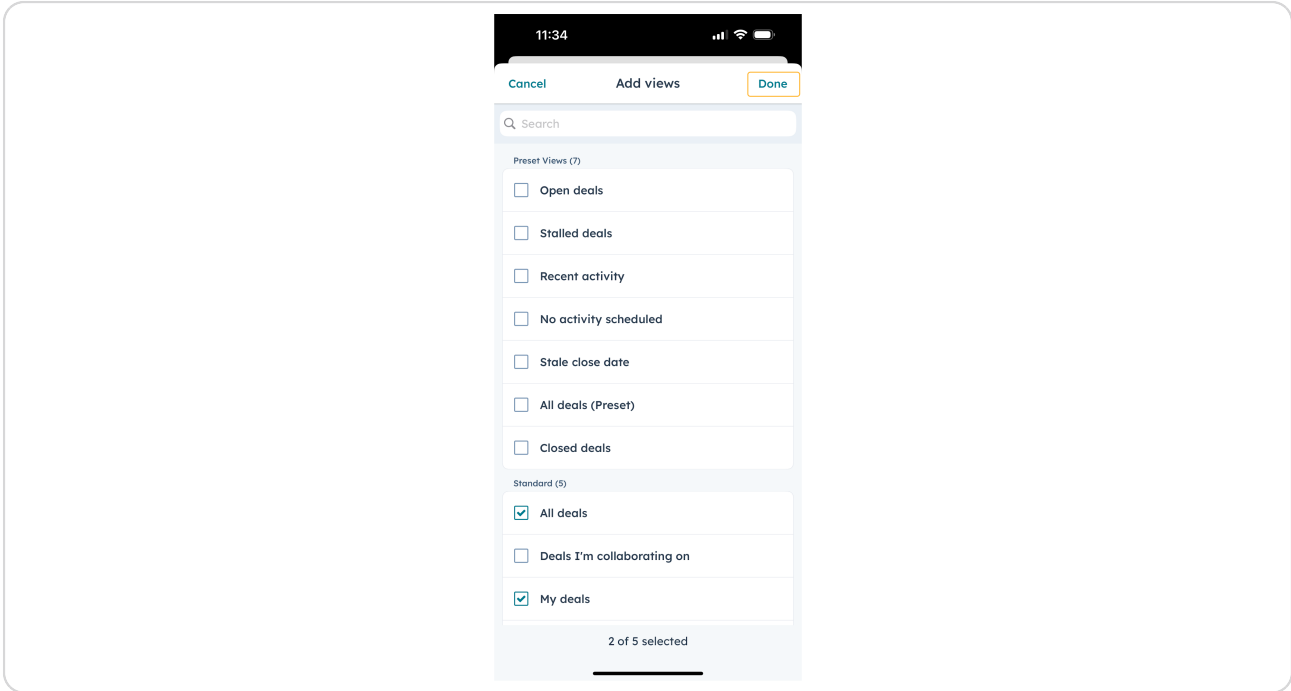
STEP 21

Check off My deals



STEP 22

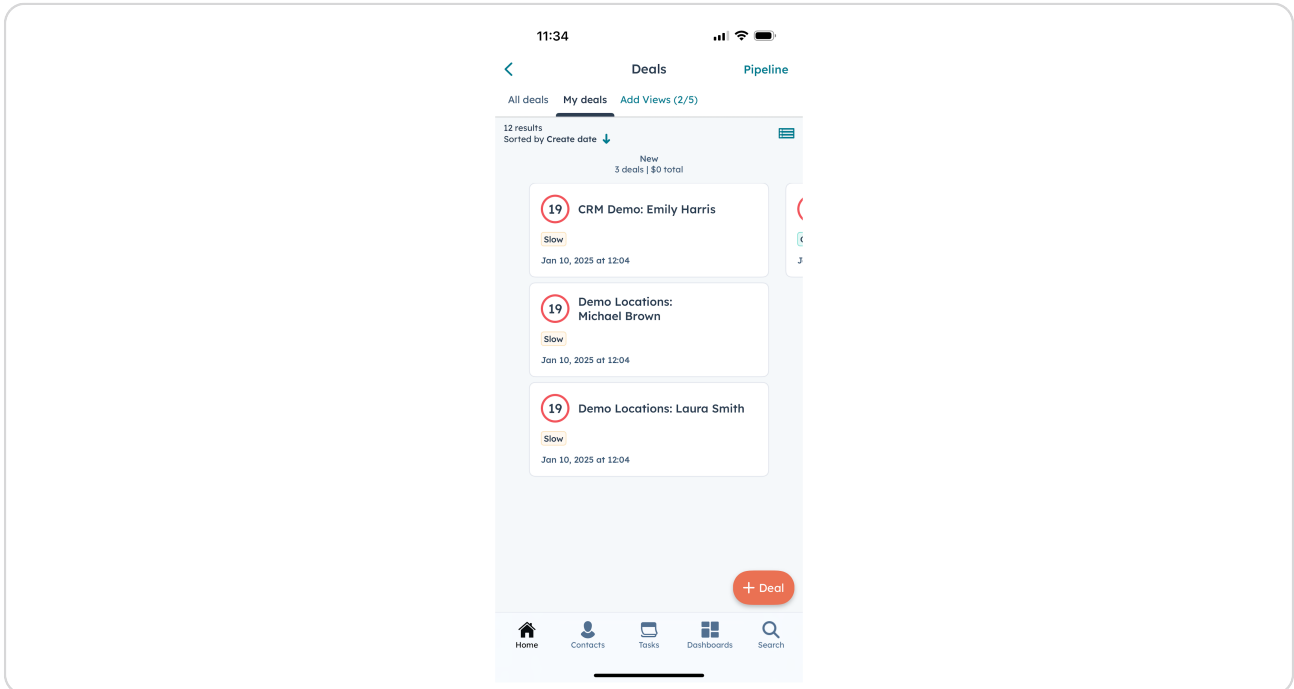
Click Done



STEP 23

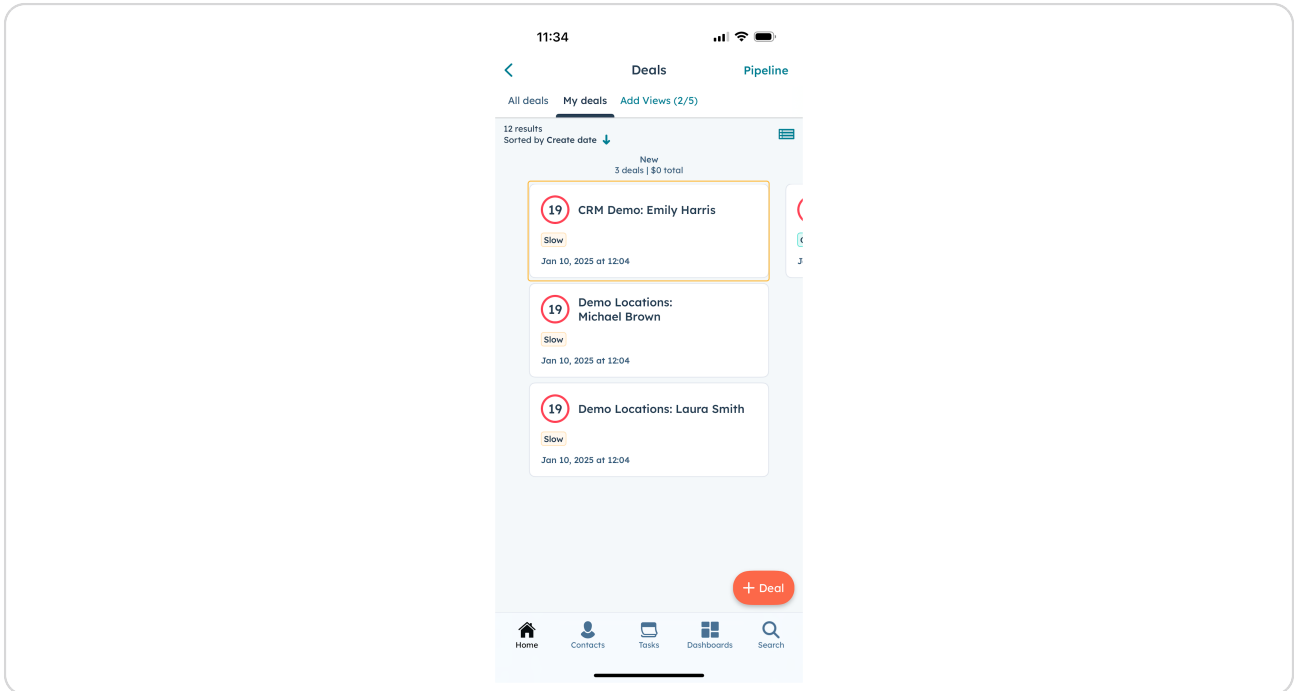
Now you have filtered down to your Deals so you can quickly locate Deals that need updated

Note: Ignore the deal score number.



STEP 24

To access a Deal record, Click on the Deal

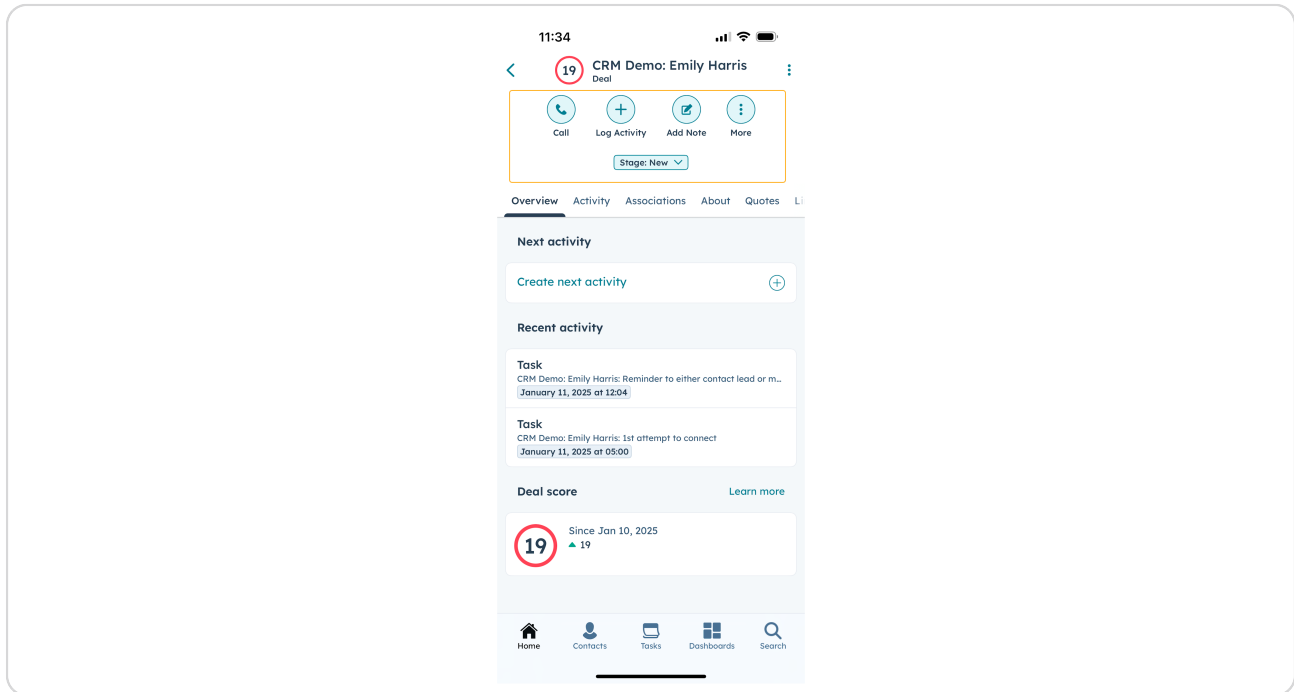


STEP 25

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.

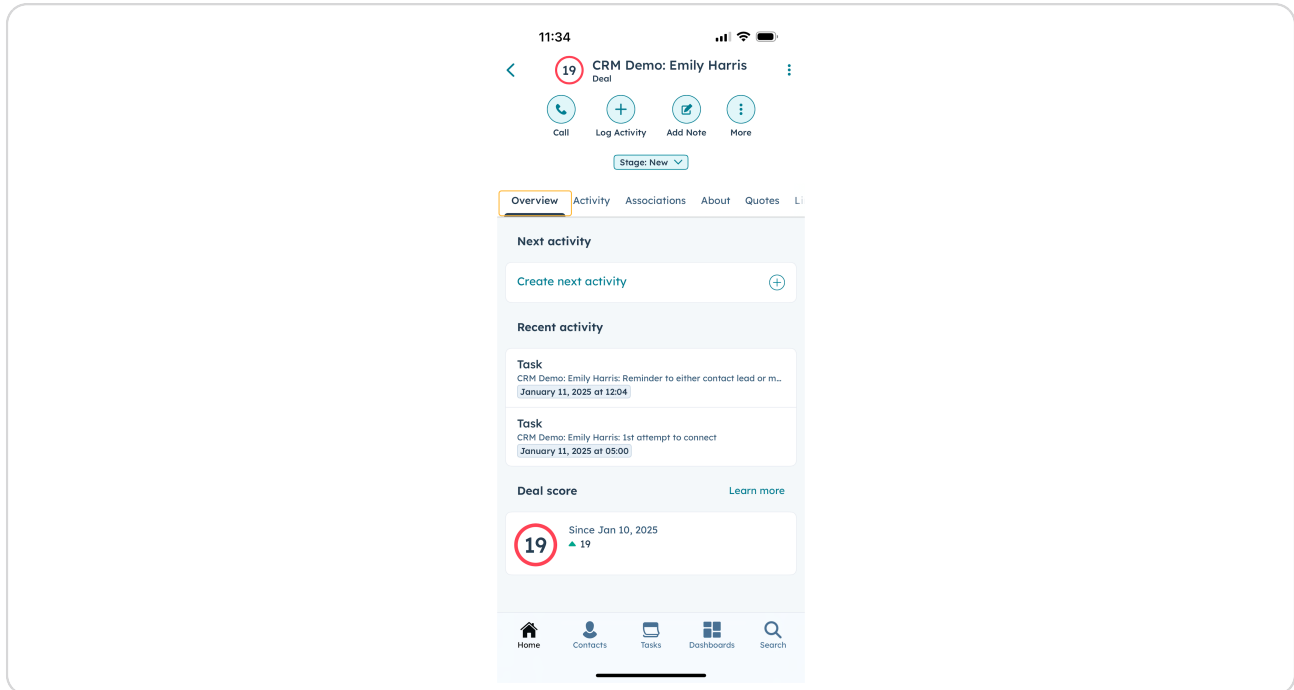


STEP 26

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

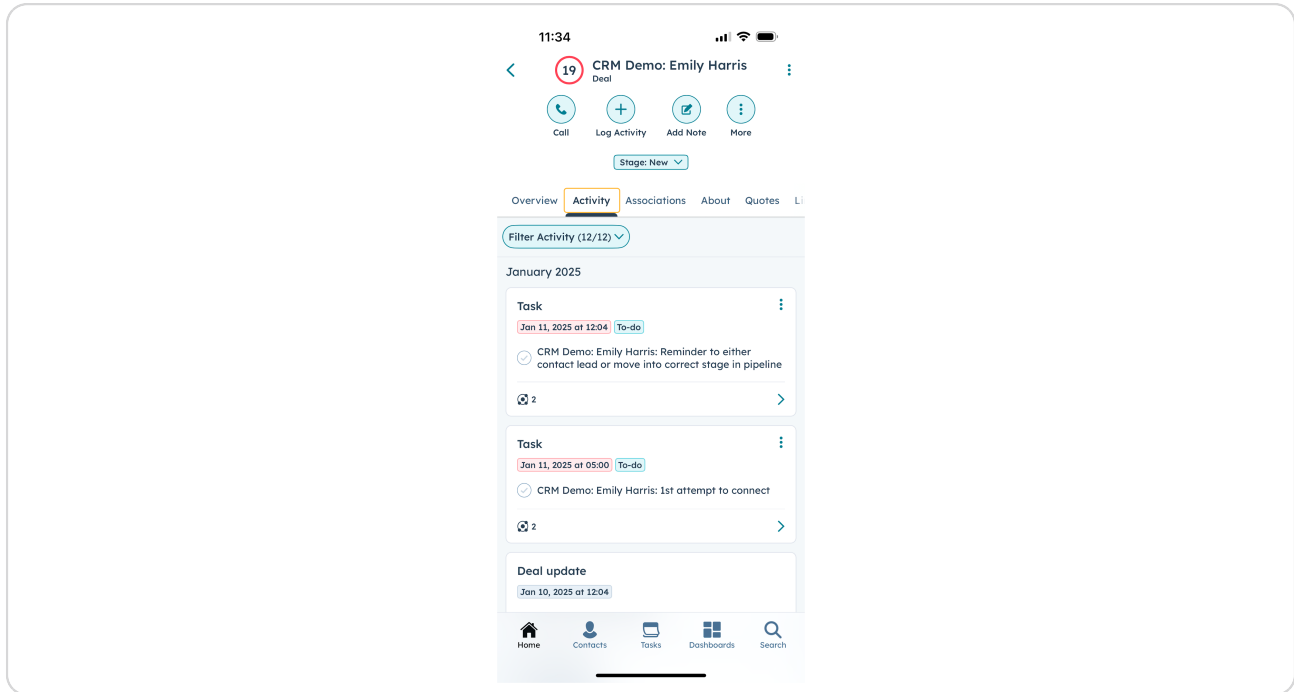
Within this section you can see any Recent activities and create Next activities.

Note: Ignore the Deal Score.



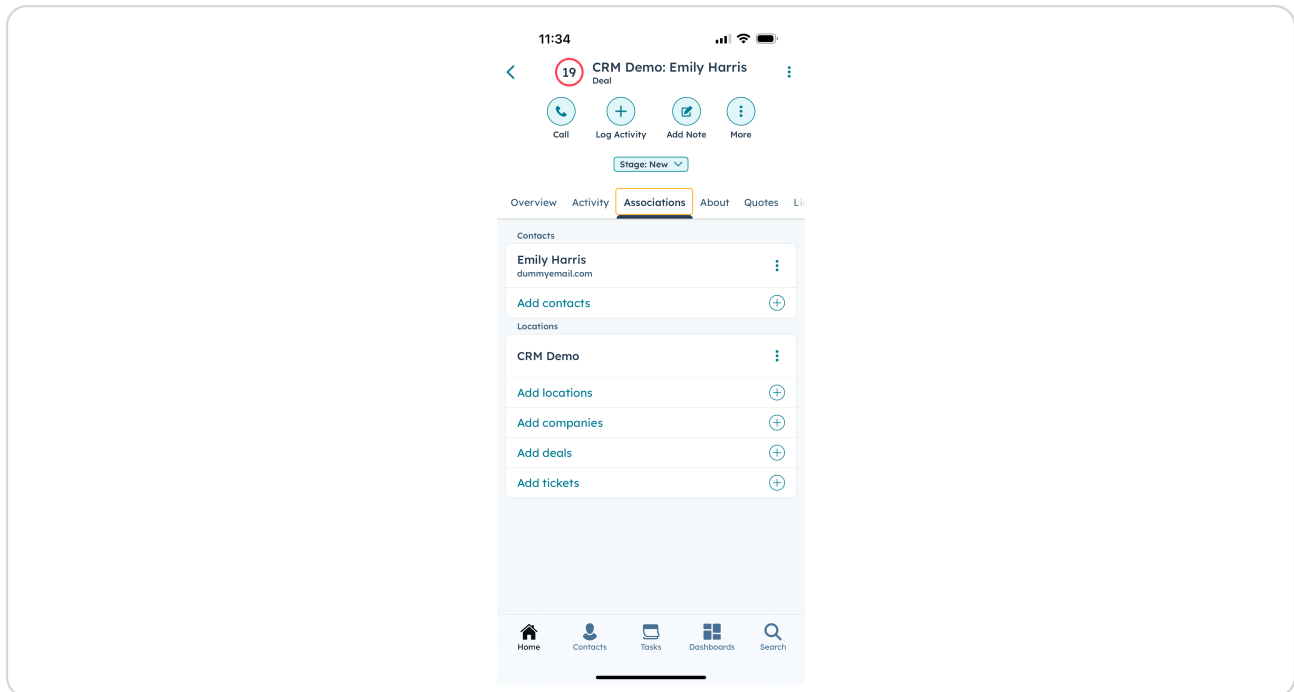
STEP 27

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.



STEP 28

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

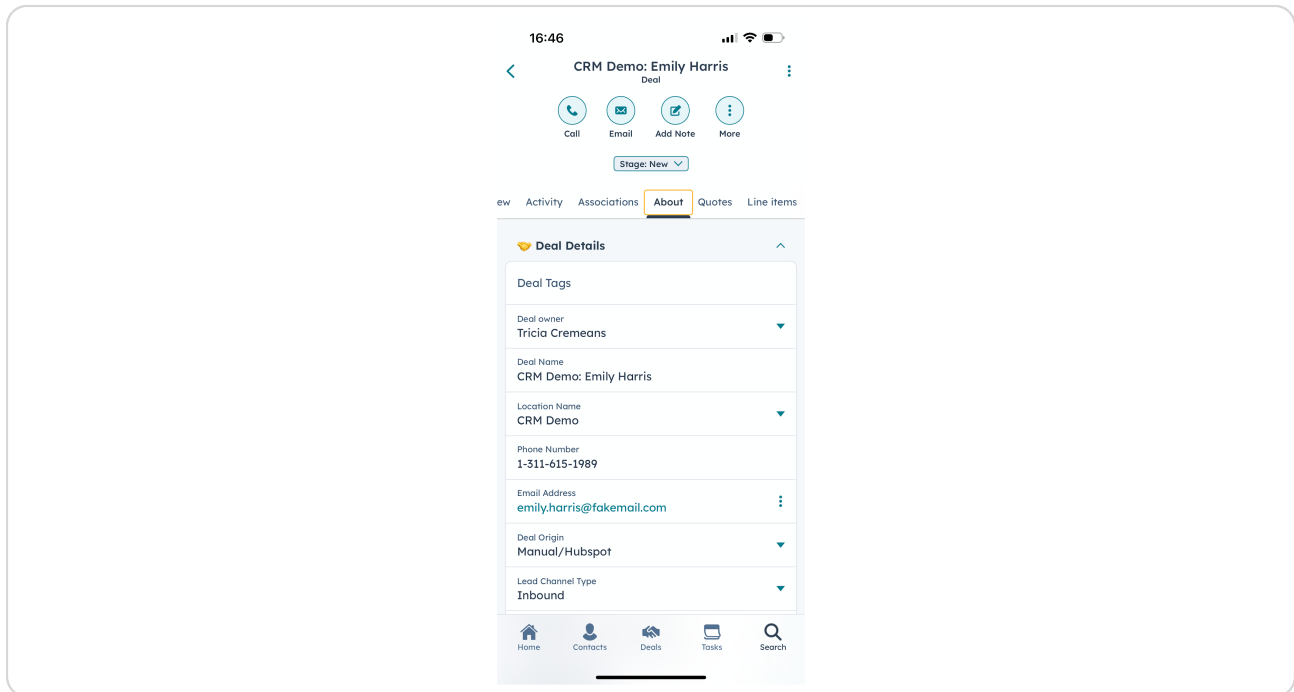


STEP 29

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

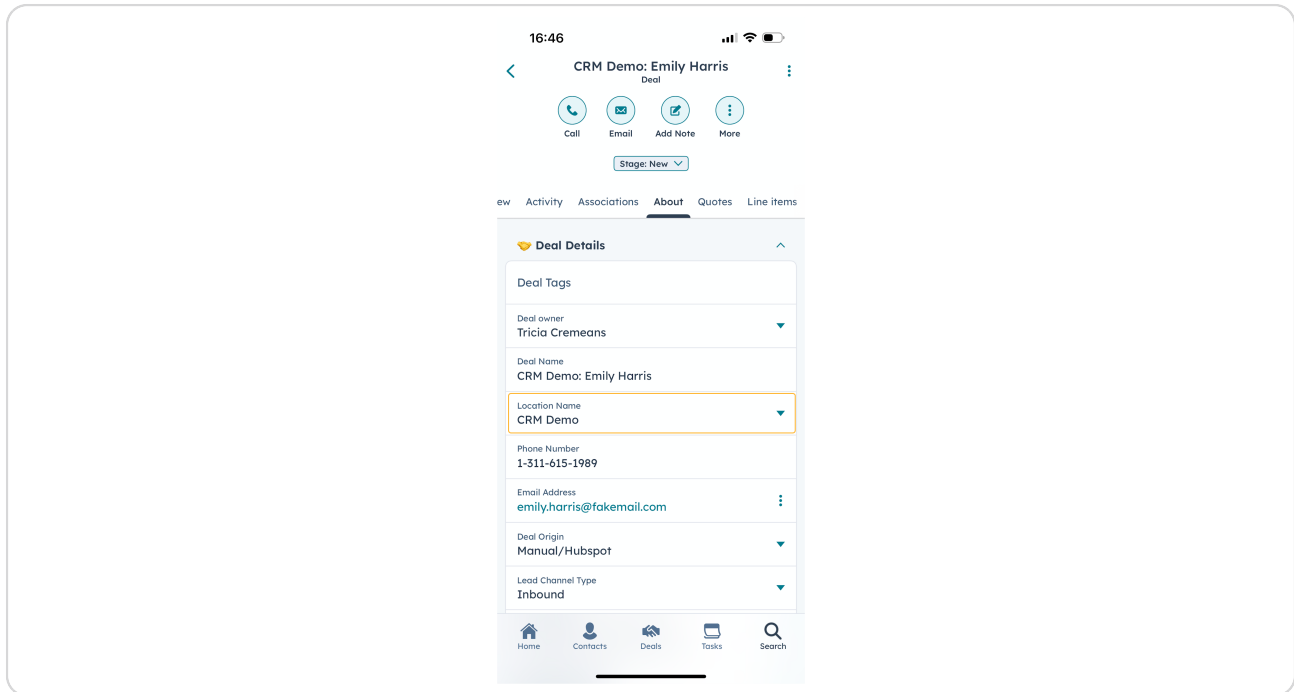
Note: You can scroll on any tab to see more information. On the About tab there will be information on:

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



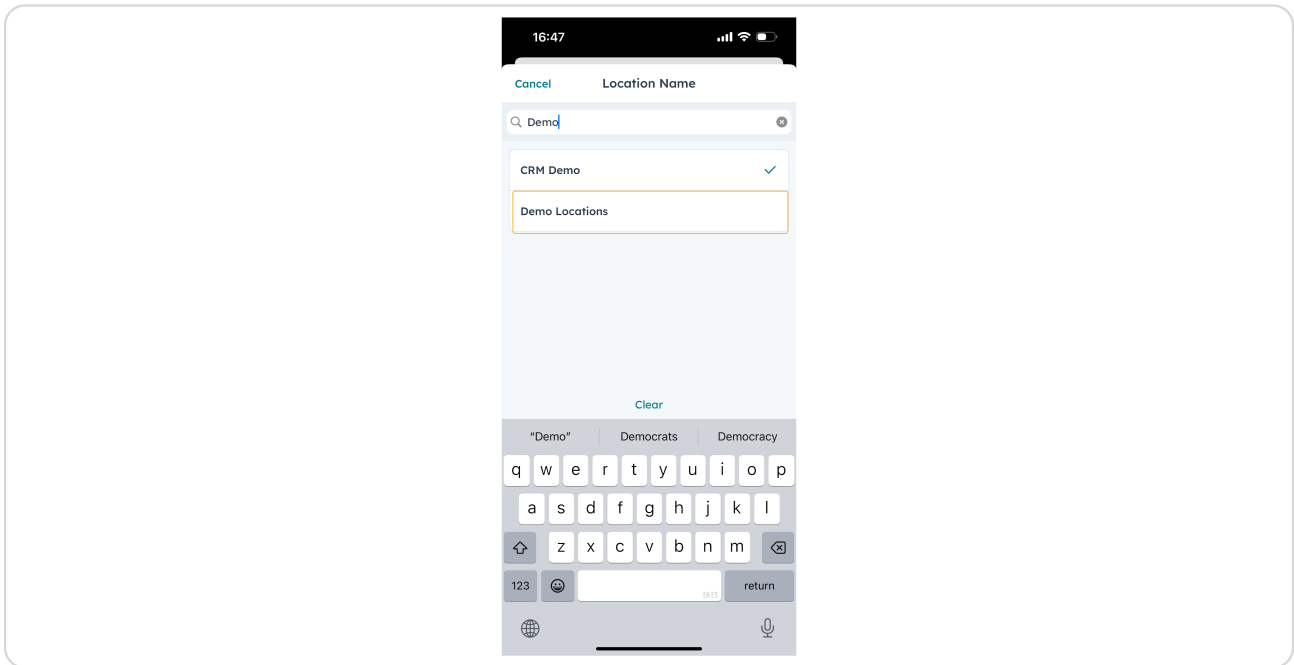
STEP 30

To edit the information on the About tab, Click on the field that needs to be edited



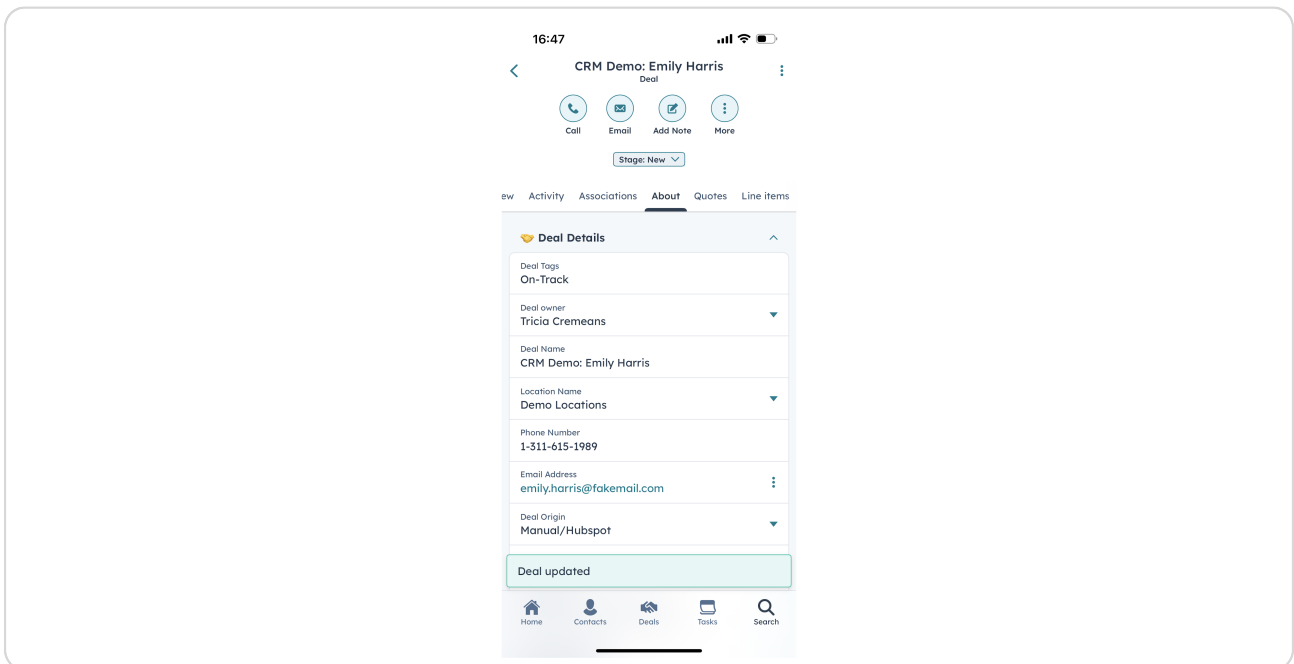
STEP 31

Update or add the information needed



STEP 32

The field will auto-update



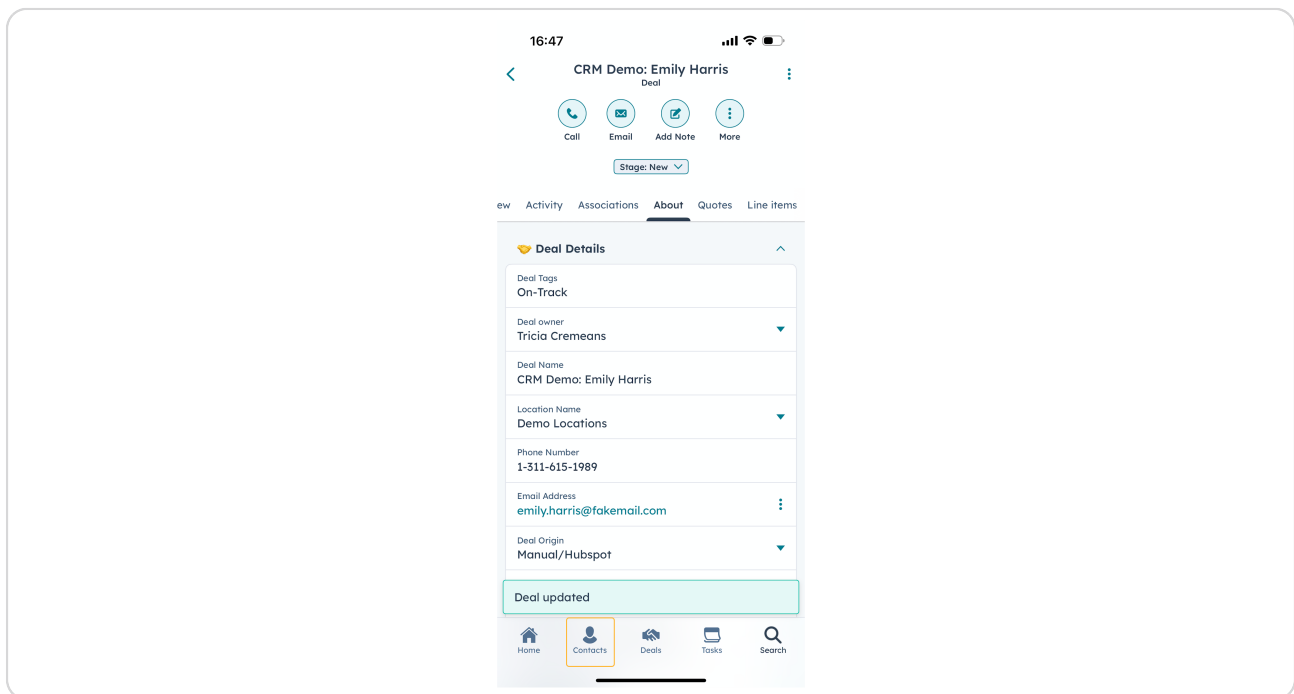
i Note: There are some fields that you will need to Click on, Update then Click Save.

Accessing Pros (Contacts)

2 Steps

STEP 33

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



STEP 34

This will take you to All contacts

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

Names have been blurred for confidentiality reasons.

