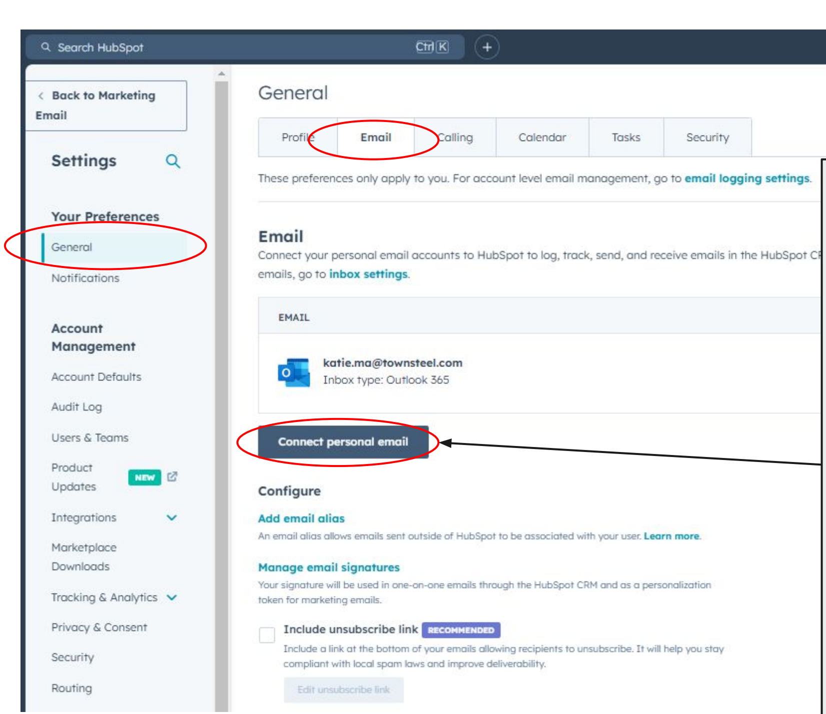
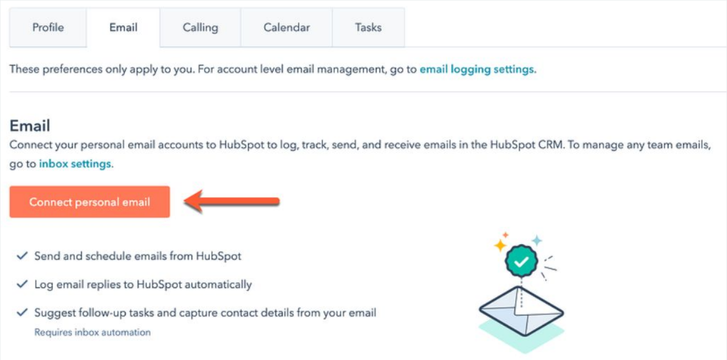
HubSpot Basic Training Guide

Objective:

1. How to connect your Outlook account
2. How to import existing contacts into HubSpot contacts
3. How to set up a contact
   a. How to create notes, emails, calls, and tasks
   b. How to set up reminders
   c. How to “@” other users
4. How to set up a company
5. How to look at a deal
6. How to find deals within a vertical deal-type
7. How to use filtering
8. How to operate sales reports dashboards
9. How to see all of your activities in one place
10. How to create lists

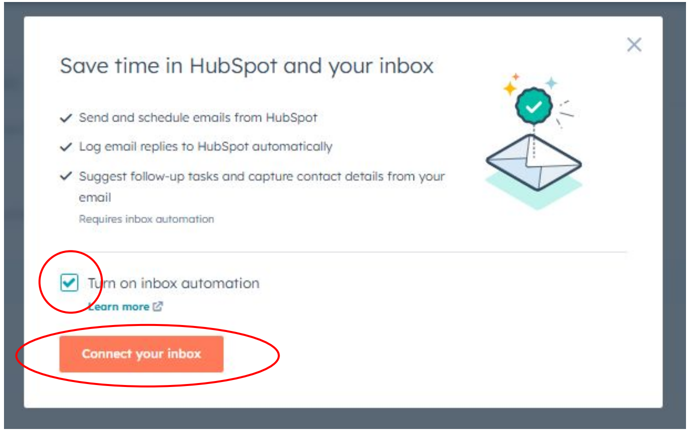
How to connect your Outlook account



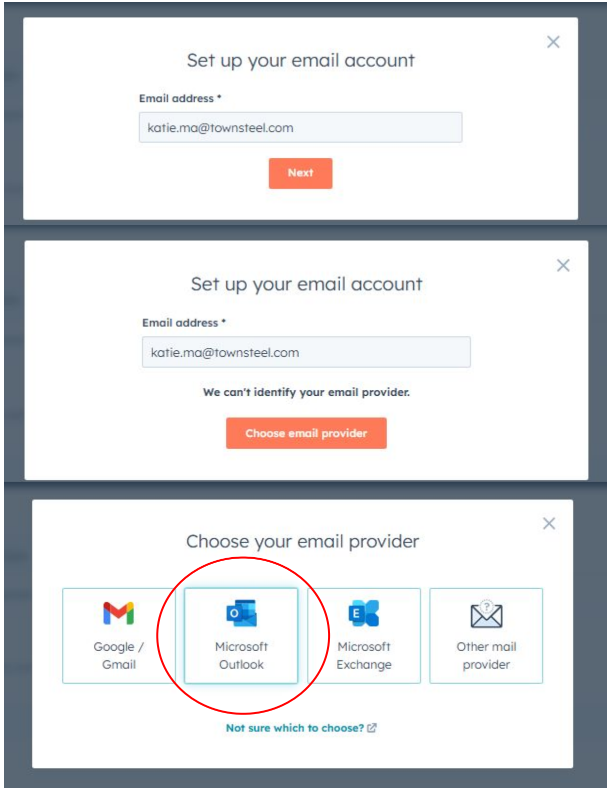


An existing email is already connected in this example (your screen should look like the picture above). Click on the "Connect personal email" button to start your email connection process.

How to connect your Outlook account



Check the inbox automation before you click "Connect".



1. Type in your email.
2. HubSpot will not identify our email provider.
3. Choose "Microsoft Outlook" for the provider.
4. It will take you to the Microsoft login page. Log in and you will be all set.

How to connect your Outlook account

What is Inbox Automation?
When turned on, HubSpot scans new income/outgoing emails (not past ones) to:

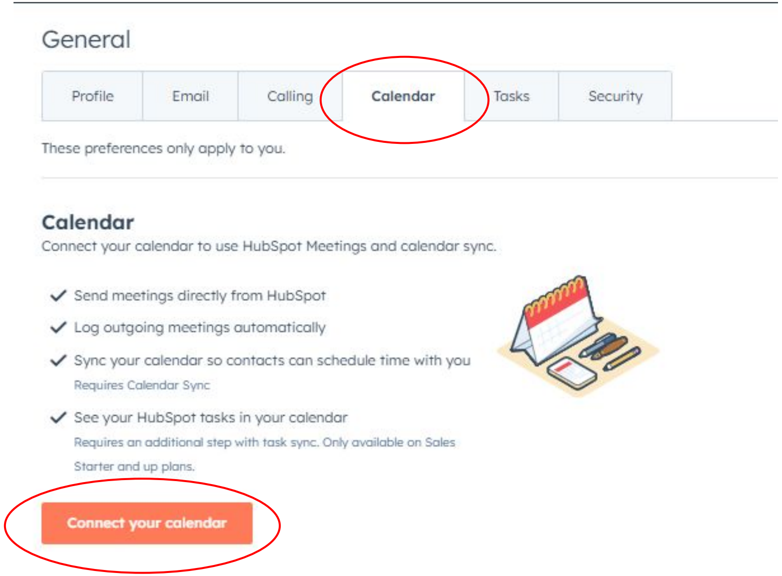
- Add contact details from email content to the CRM.
- Recommend tasks based on email content, shown as “suggested tasks” in daily digest emails.

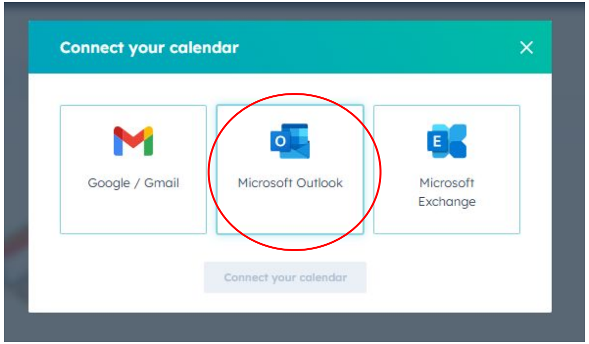
How It Works:

- **Data Handling:** AI updates contact info and creates follow-up tasks when needed.
- **Security:** Email data is securely processed and stored per HubSpot’s policies.
- **Turn Off Anytime:** You can disable inbox automation in email settings, but previously captured data stays in the CRM.

This can help with your emailing process, but it is optional.

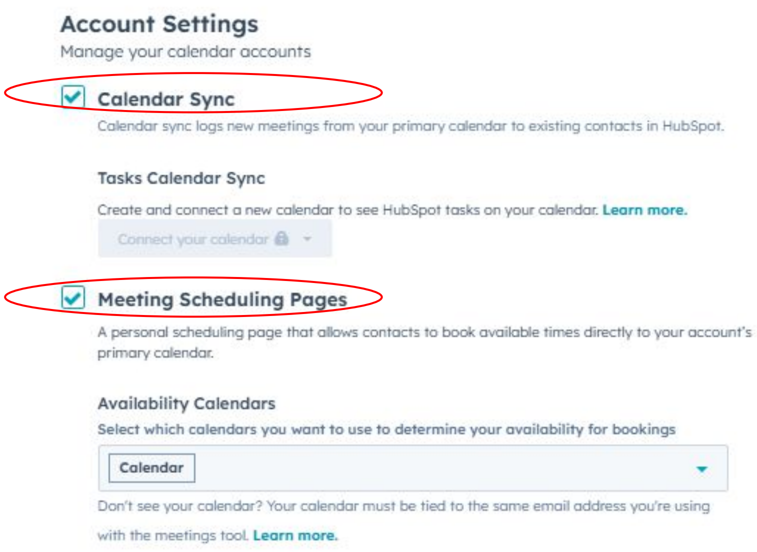
How to connect your Outlook account (Calendar)





Navigate to the “Calendar” tab and click “Connect your calendar”, then click on the “Microsoft Outlook” option. After you login to your Microsoft account, the setup will be complete.

How to connect your Outlook account (Calendar)



Enabling the "Calendar Sync" and "Meeting Scheduling Pages" is optional, but can help make your process smoother.

Why connect your Outlook calendar?

1. **Log Meetings in HubSpot CRM:** Syncing allows you to automatically log meetings in your HubSpot CRM, keeping all your meeting records organized in one place.
2. **Create Calendar Events:** When you log a meeting in HubSpot, an event is simultaneously created in your Outlook calendar, ensuring consistency between your CRM and calendar.
3. **Send Invites to Guests:** Meeting invites are automatically sent to guests, streamlining the invitation process.
4. **Automate Meeting Updates:** Edits or deletions made to events in Outlook sync with HubSpot, keeping both platforms updated.
5. **Prevent Double Booking:** Syncing helps prevent double bookings by reflecting your availability based

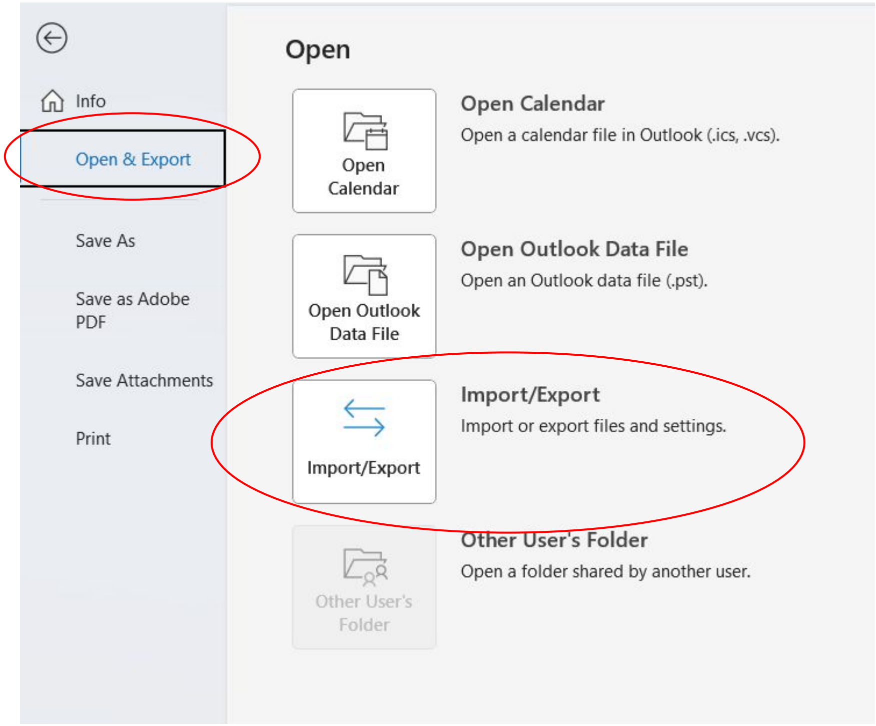
How to import existing contacts into HubSpot contacts

You can bulk import contacts into HubSpot by importing them using a single Excel file. All files imported into HubSpot must:

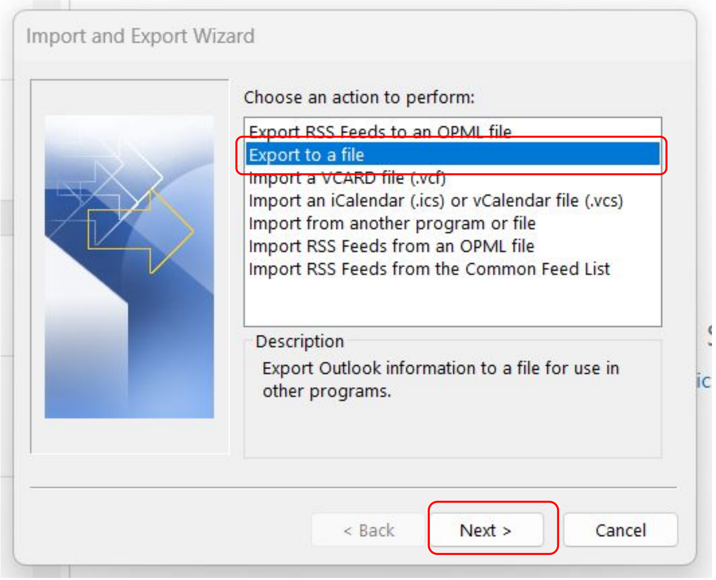
- Be a .csv, .xlsx, or .xls file.
- Have only one sheet.

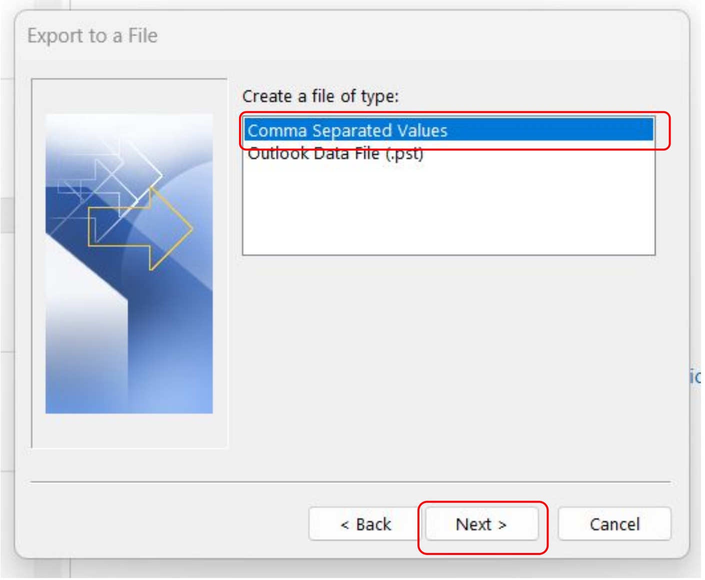
To import contacts from your Outlook directly into HubSpot, you need to first export your Outlook contacts into an Excel file.

First, navigate to “File”. Then, click “Open & Export” and then “Import/Export”.

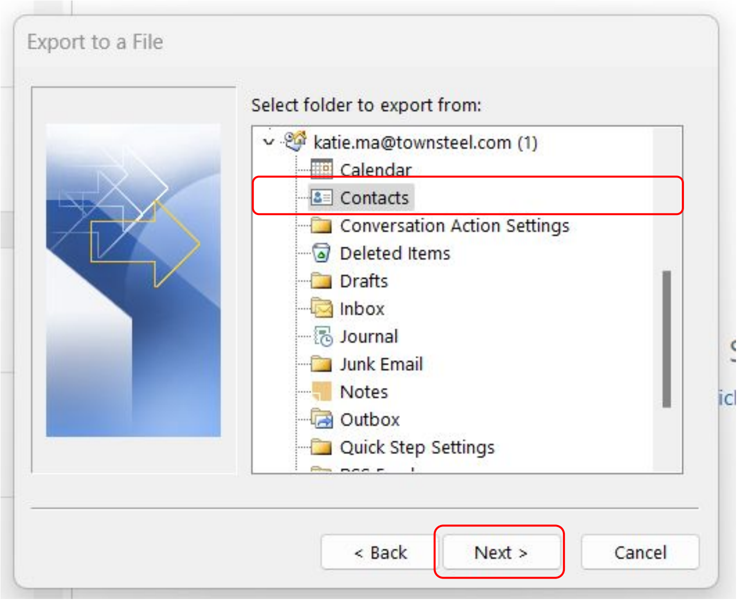


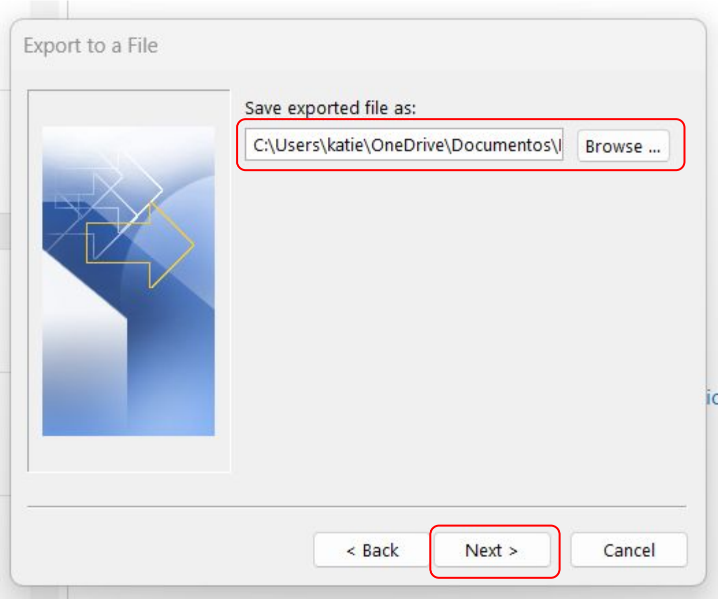
How to import existing contacts into HubSpot contacts



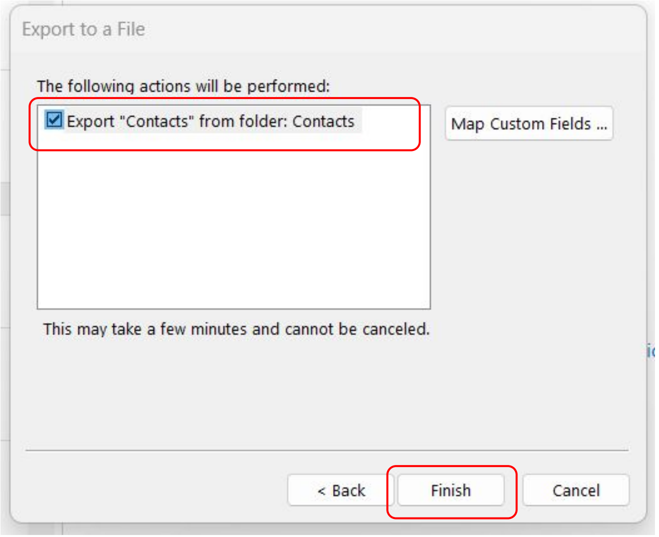


How to import existing contacts into HubSpot contacts





How to import existing contacts into HubSpot contacts



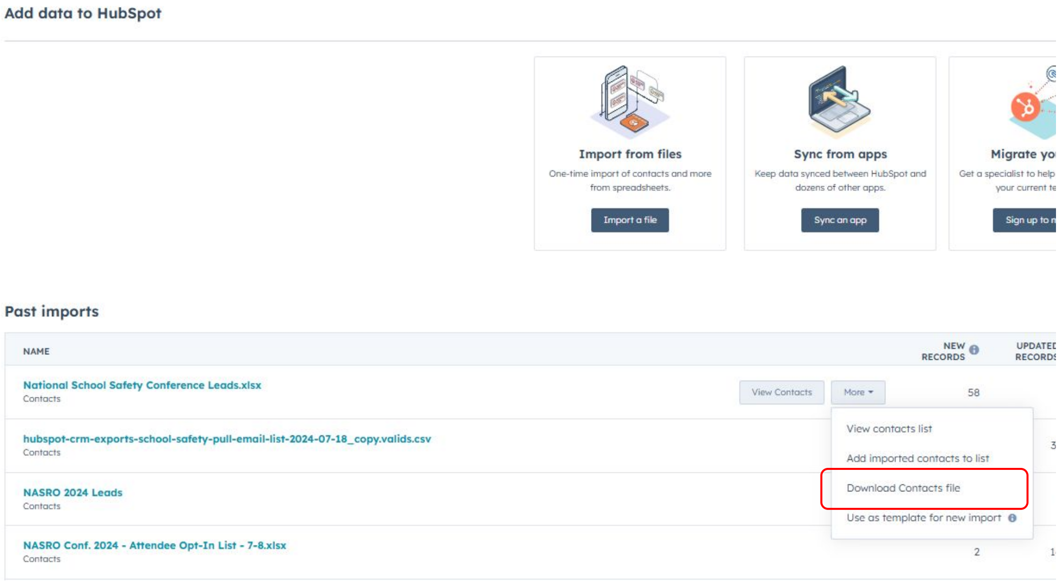
Once you have completed the contact exporting process and have all of your desired contacts in a Excel file, there are a few technical adjustments to make to the file before importing into HubSpot.

How to import existing contacts into HubSpot contacts

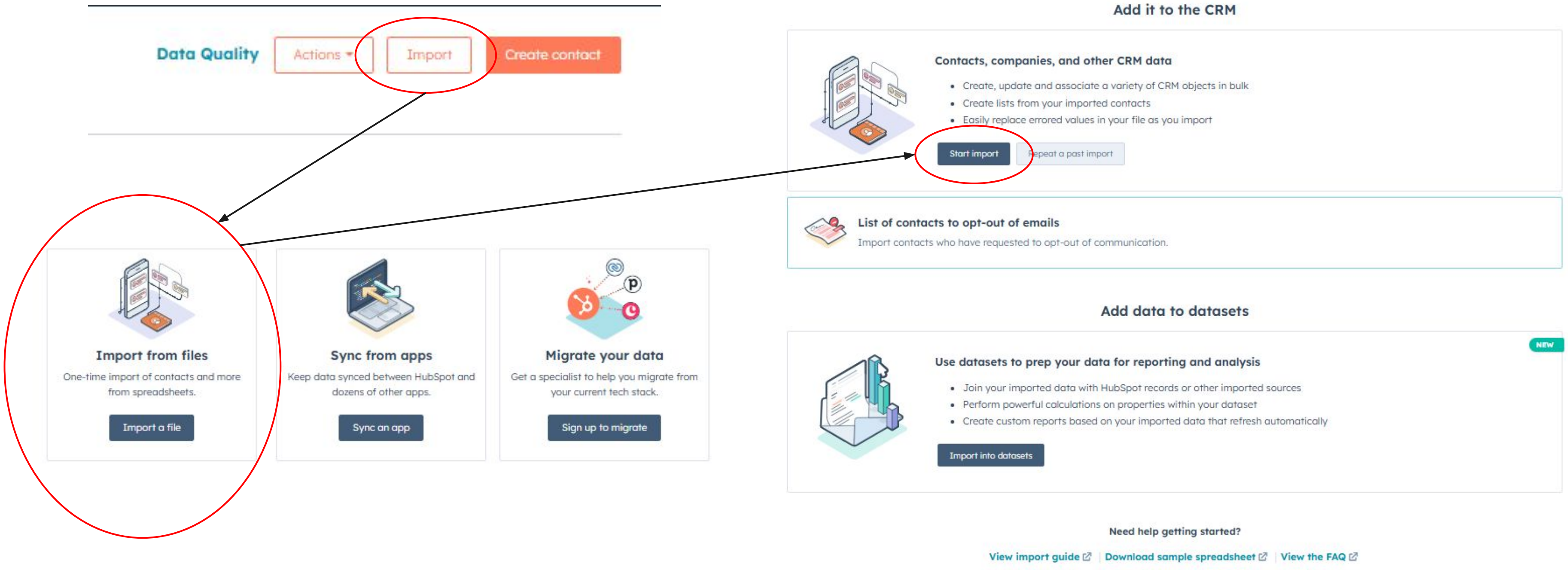
It is necessary to add a header row in which each column header corresponds to a property in HubSpot. The column headers can be organized in any order without affecting the import. The necessary properties include:

- Last Name
- First Name
- Email
- Title/Position held:
- Phone:
- Mobile Phone:
- Organization
- City
- State

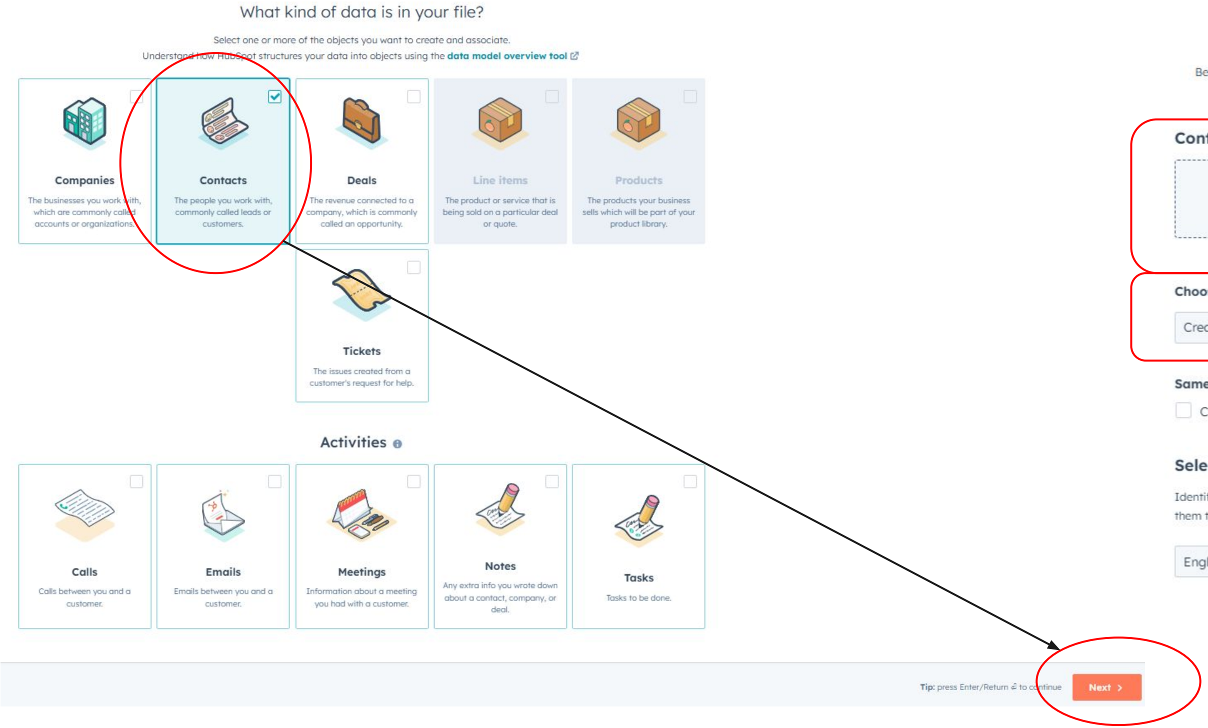
You can delete any excess information in the file for the sake of organization. You can also download a previous import file if you want to see an example.

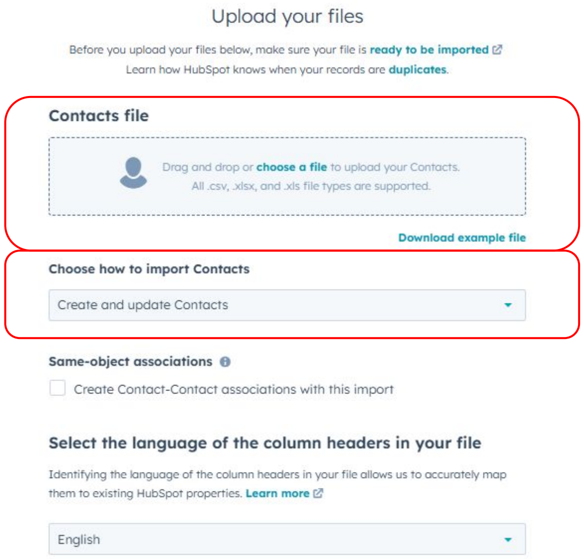


How to import existing contacts into HubSpot contacts

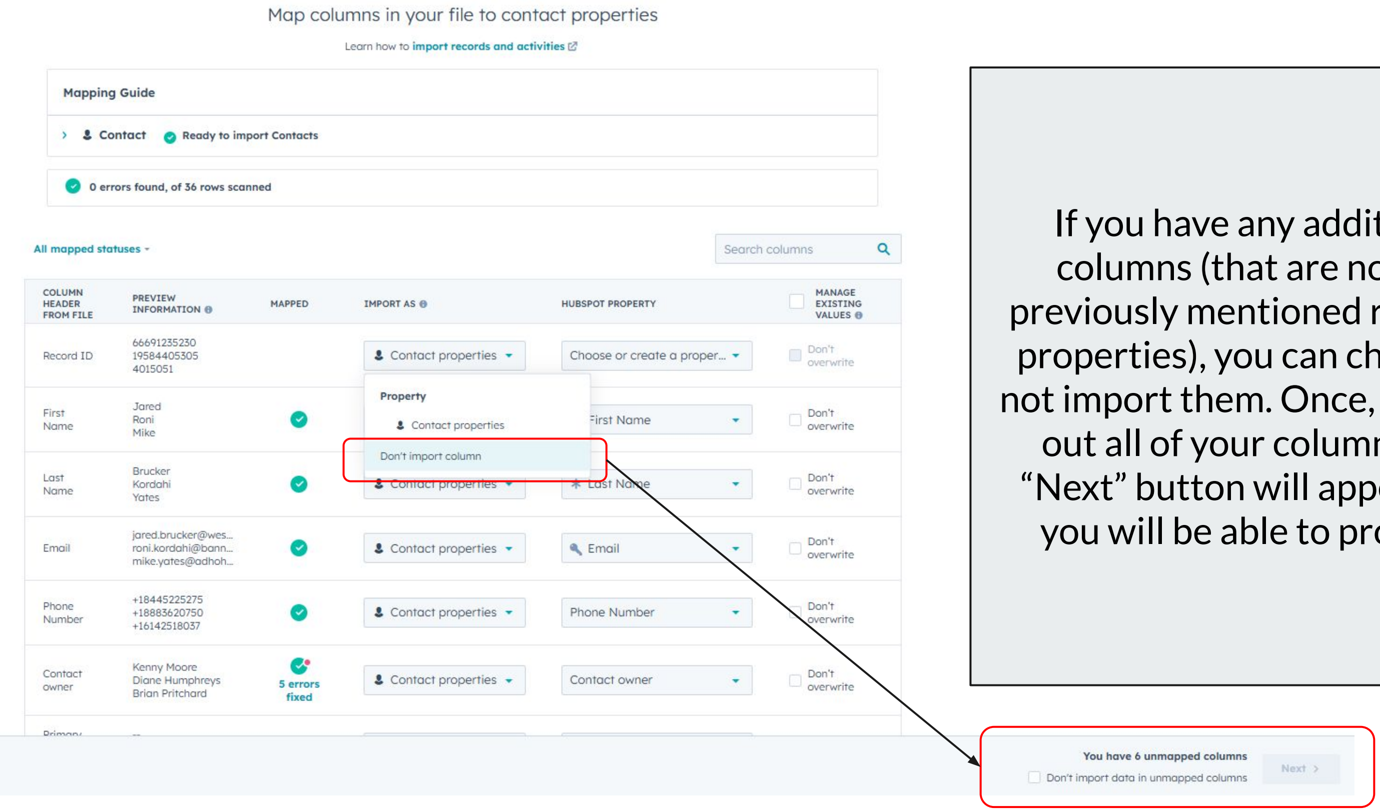


How to import existing contacts into HubSpot contacts



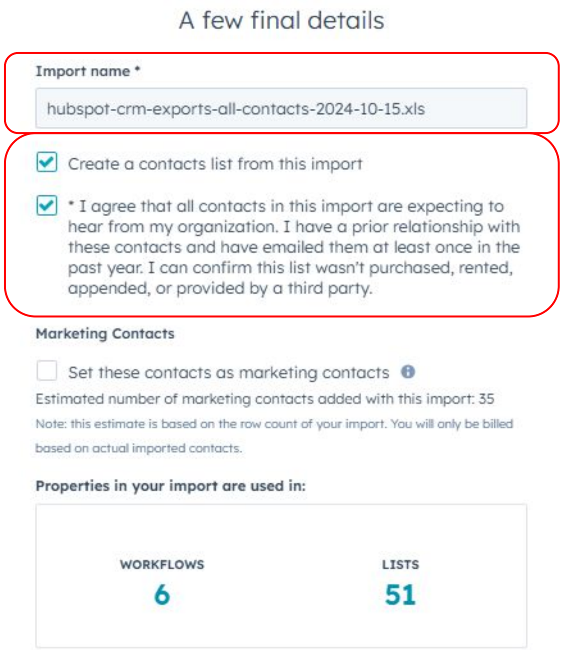


How to import existing contacts into HubSpot contacts



If you have any additional columns (that are not the previously mentioned required properties), you can choose to not import them. Once, you map out all of your columns, the “Next” button will appear and you will be able to proceed.

How to import existing contacts into HubSpot contacts



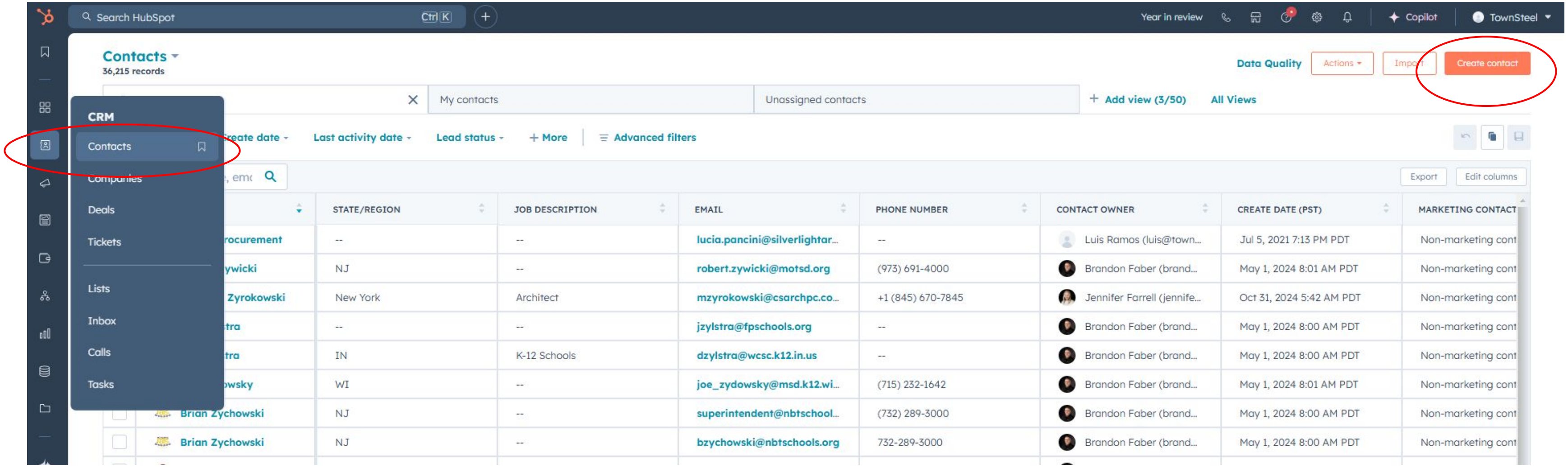
Type in a name for the import.

Check the "Create a contacts list from this import" for easy access to this specific batch of contacts.

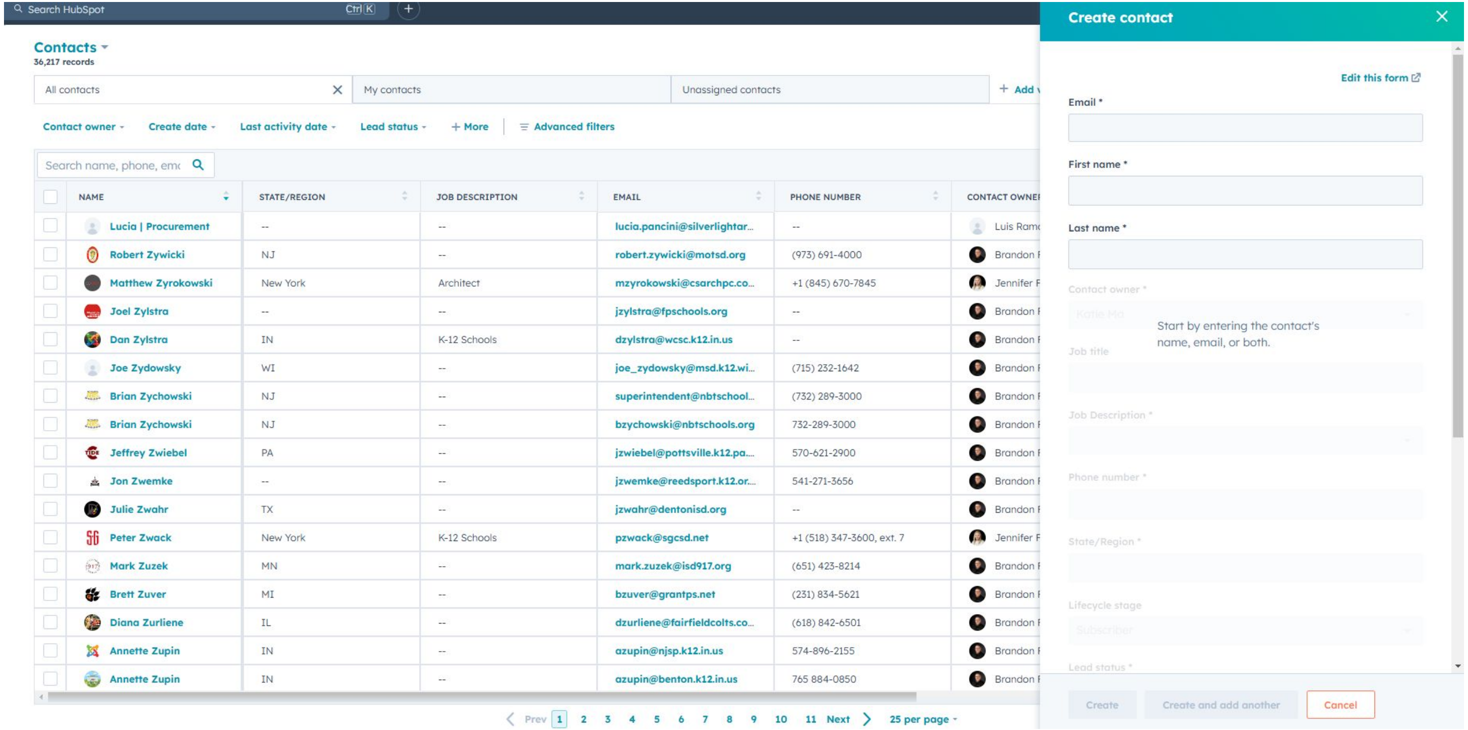
Check the agreement statement. Make sure that you do **NOT** click "set these contacts as marketing contacts". The contacts you import are non-marketing contacts.

After this, you will be all set to import.

How to set up a contact



How to set up a contact



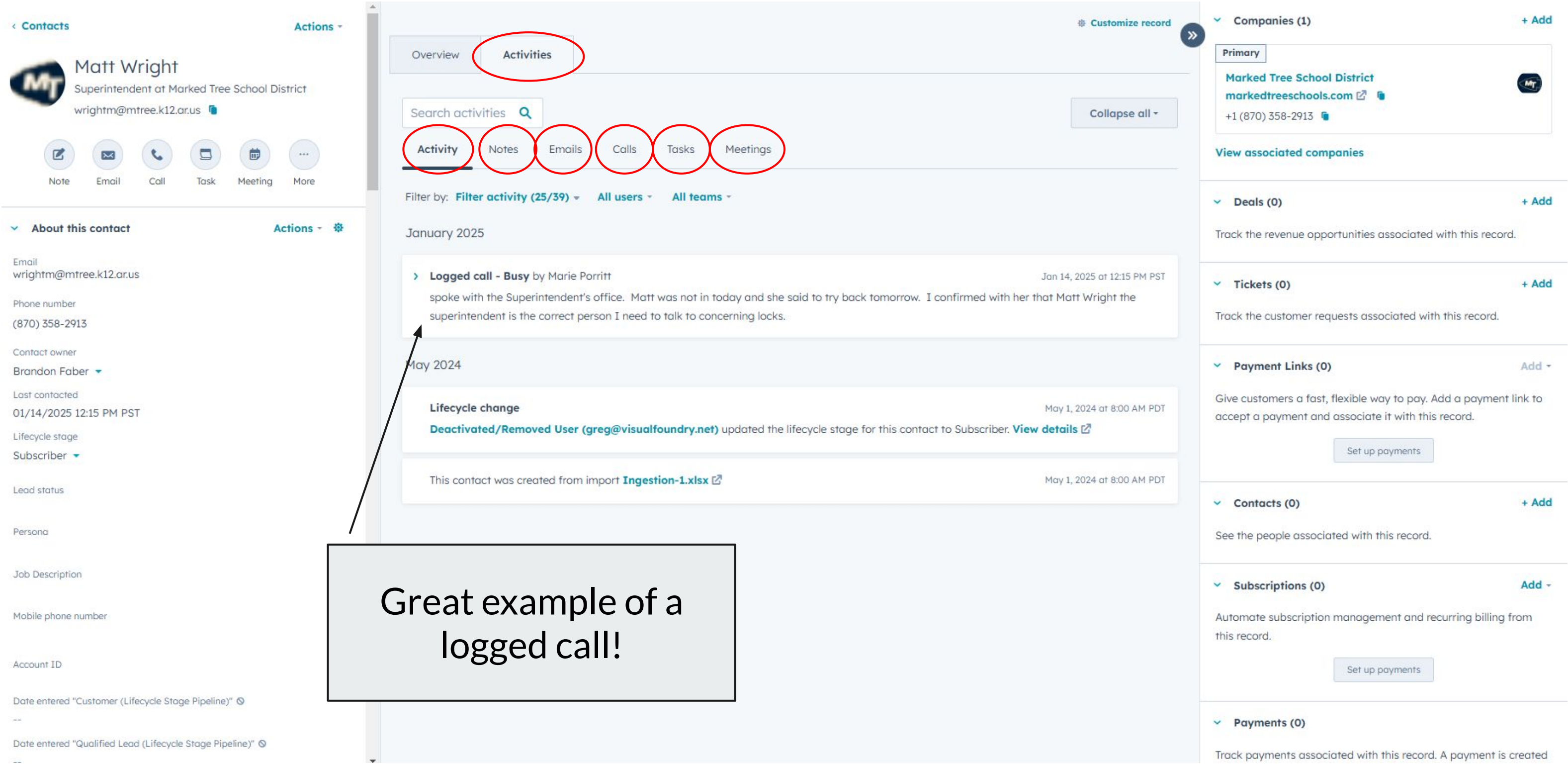
How to set up a contact

Required fields to fill out (all required fields will have an * next to them):

- Email
- First name
- Last name
- Job description (basically what kind of business is this contact; supplier, distributor, healthcare, etc.)
- Phone number
- State/region
- Lead status
- Sales agency (in this case, you would fill in “TownSteel House Account”)

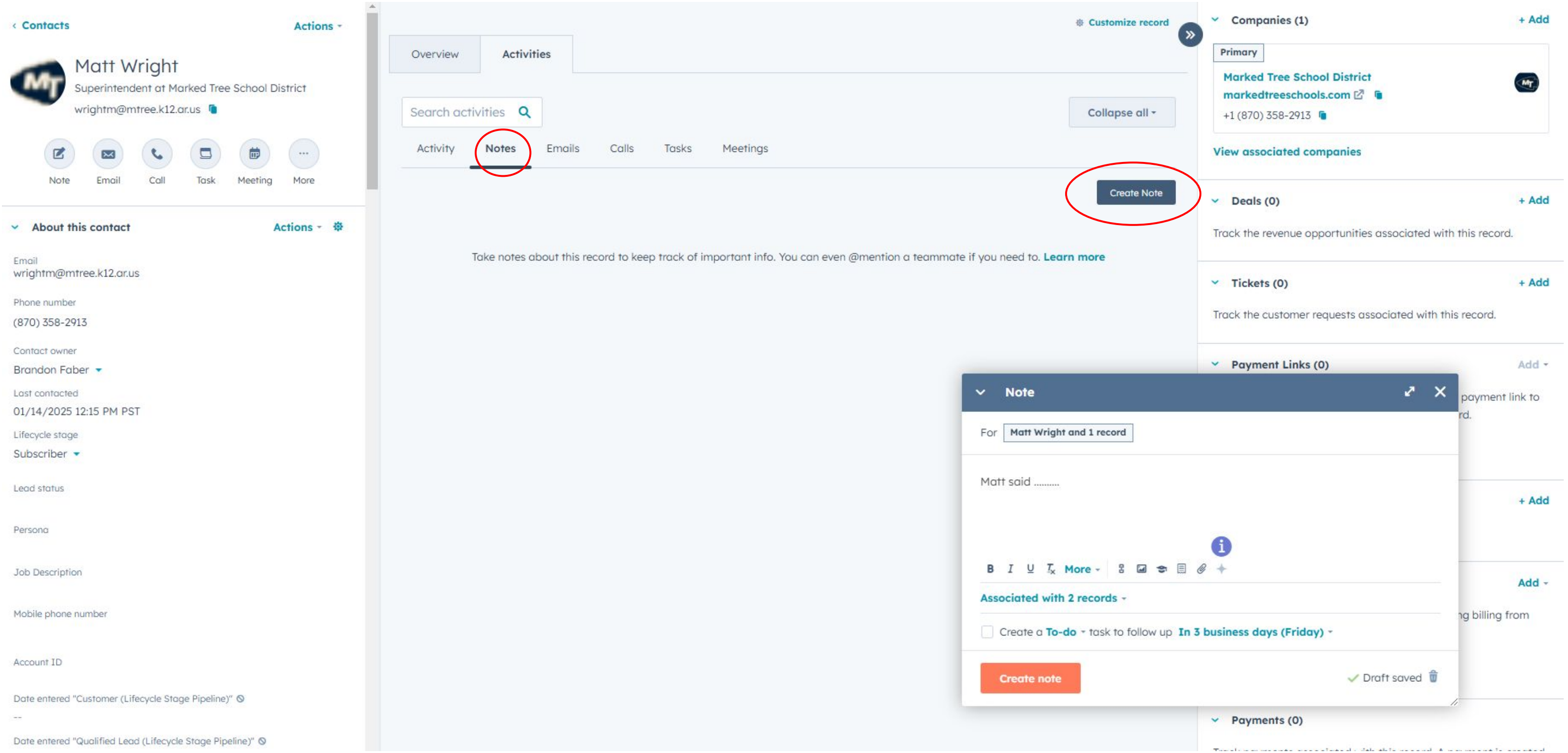
The more information you can fill out, the better. Click “Create” once you have filled out at least all of the required fields and you’re done!

How to create notes, emails, calls, tasks, and meetings

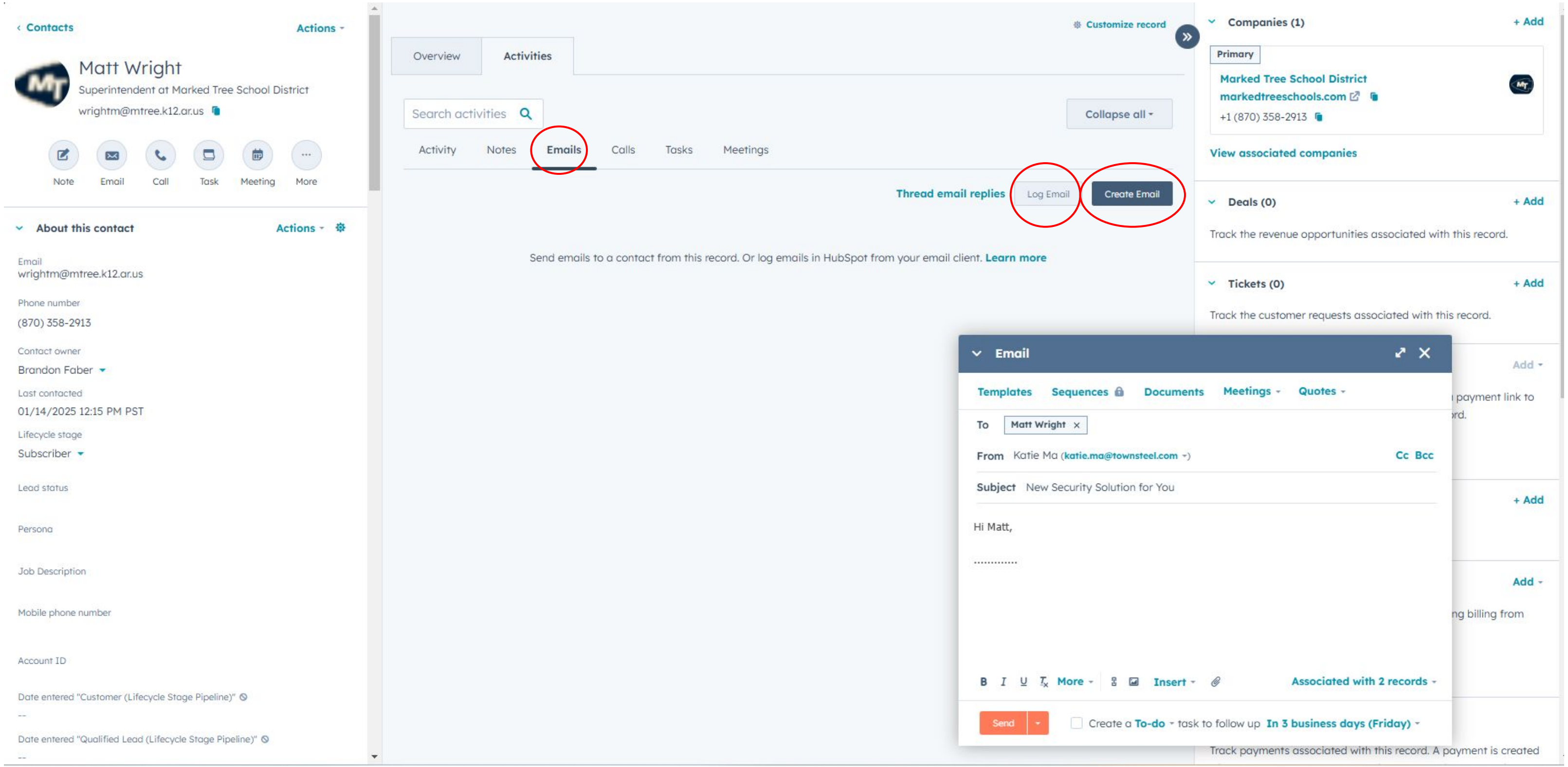


Great example of a logged call!

How to create notes under a contact



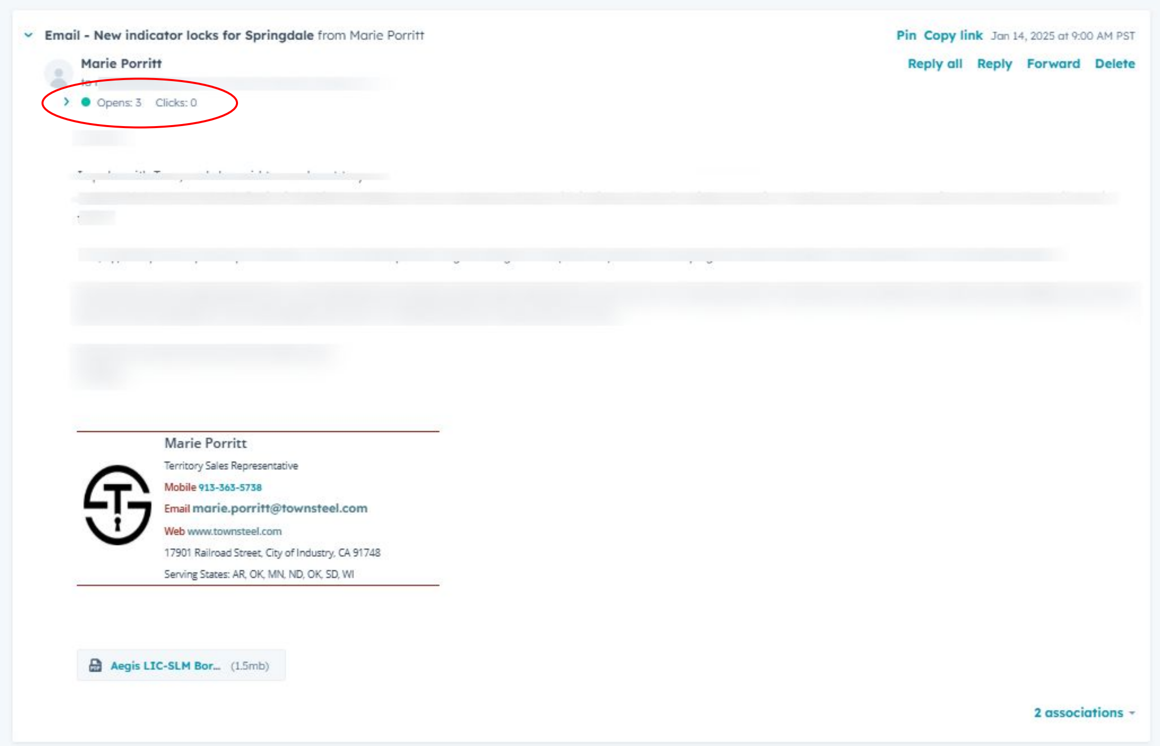
How to create emails under a contact



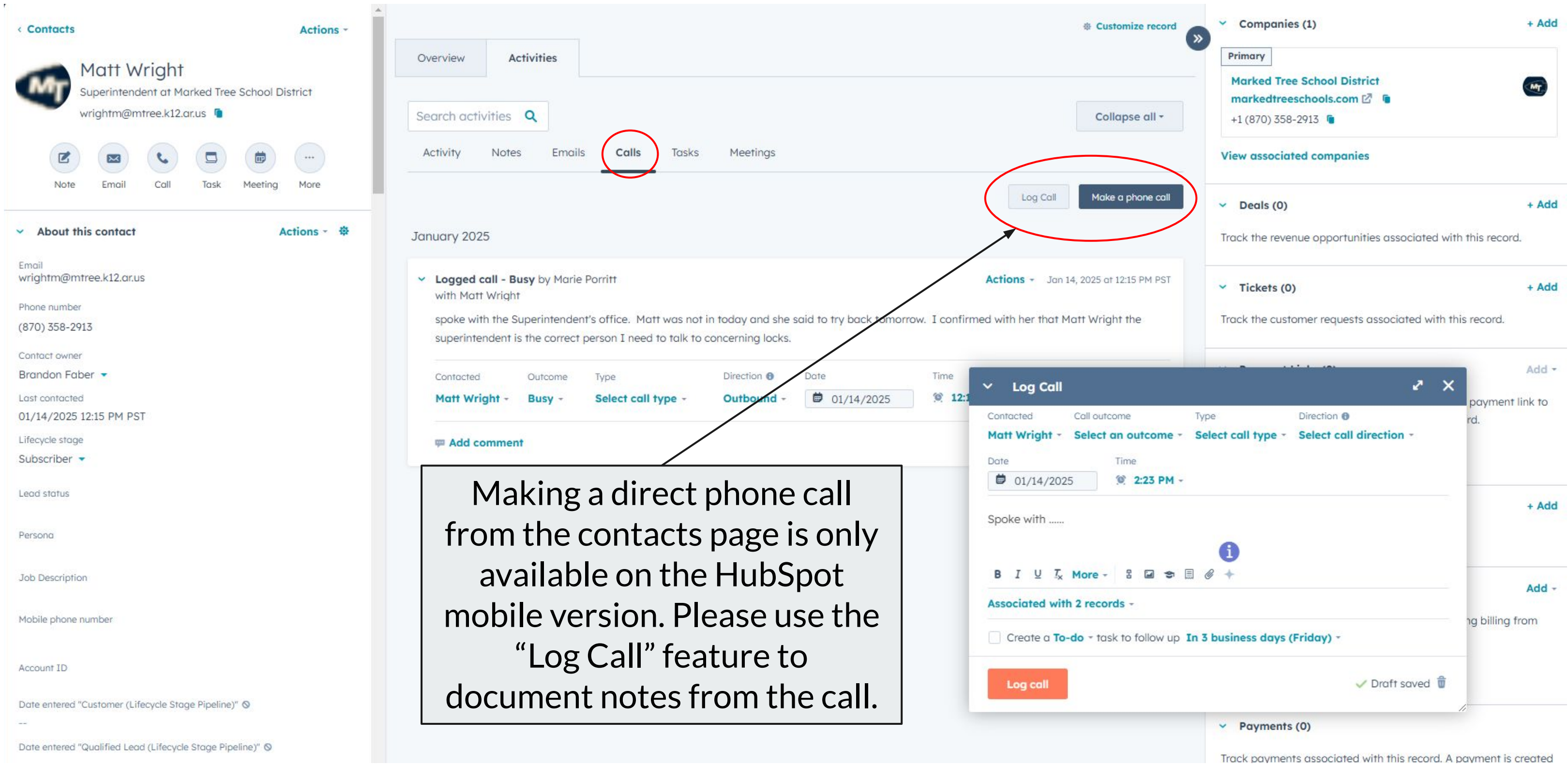
How to create emails under a contact

The reasons for emailing customers through the HubSpot platform is:

1. For reporting and documentation purposes.
2. You are able to see how many opens and clicks are made by the recipient.

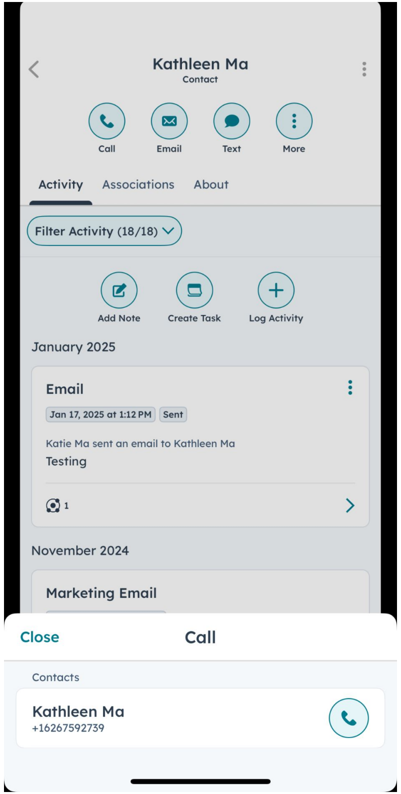


How to document calls under a contact



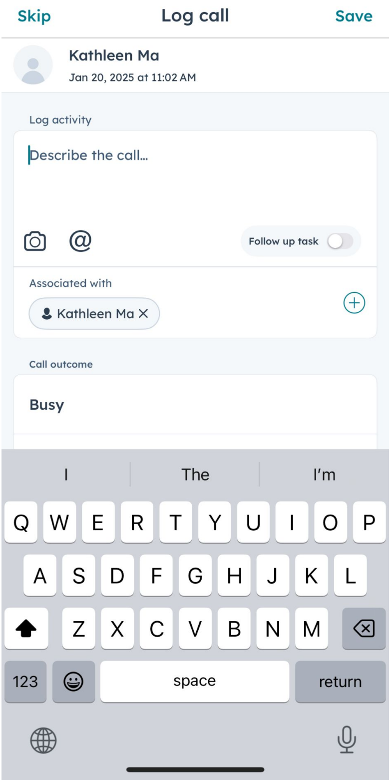
Making a direct phone call from the contacts page is only available on the HubSpot mobile version. Please use the “Log Call” feature to document notes from the call.

How to document calls under a contact



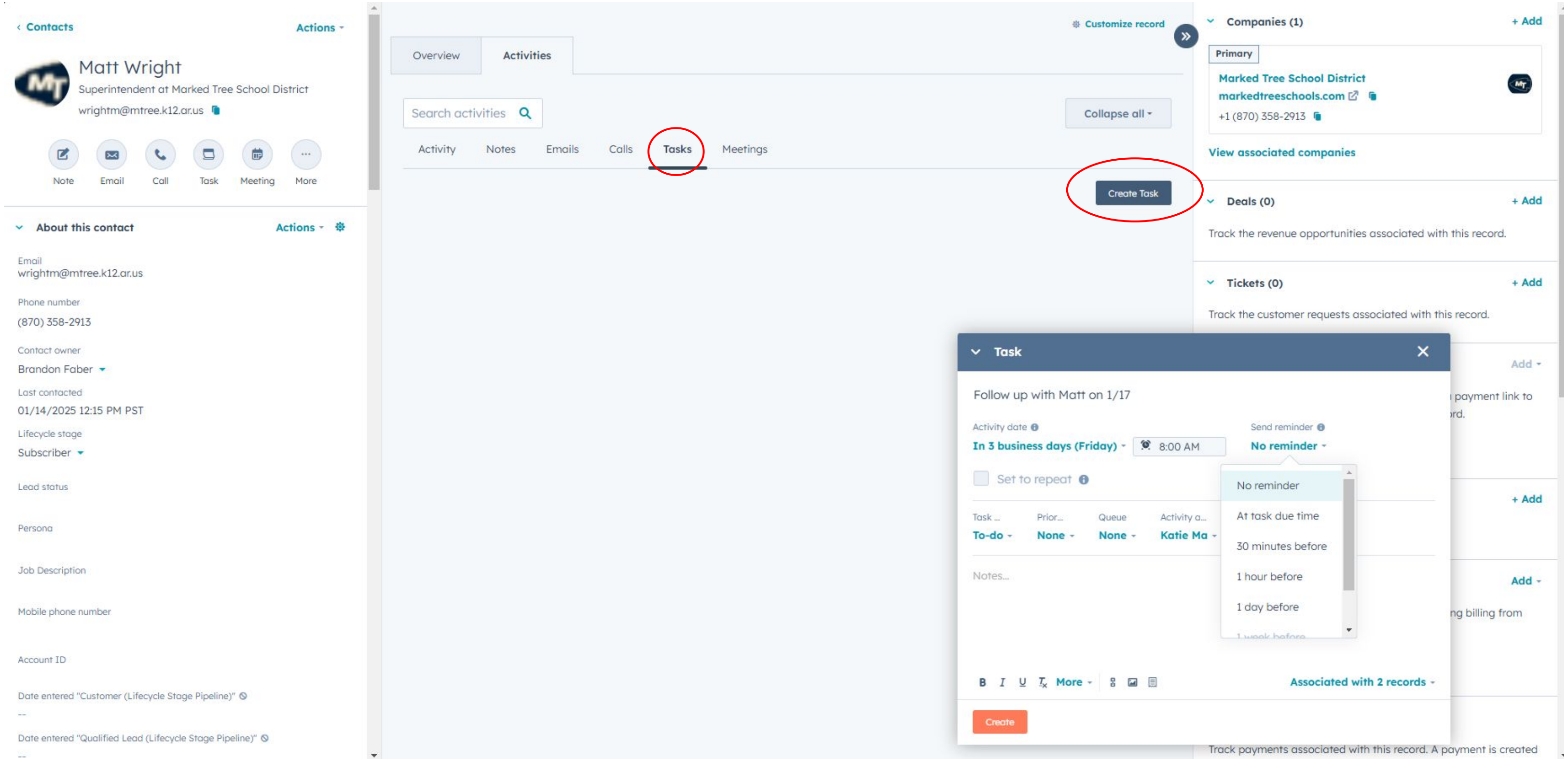
To make a call directly from the contacts page, navigate to the HubSpot mobile app.

Find the contact page and click on the call button. You can call directly from here.

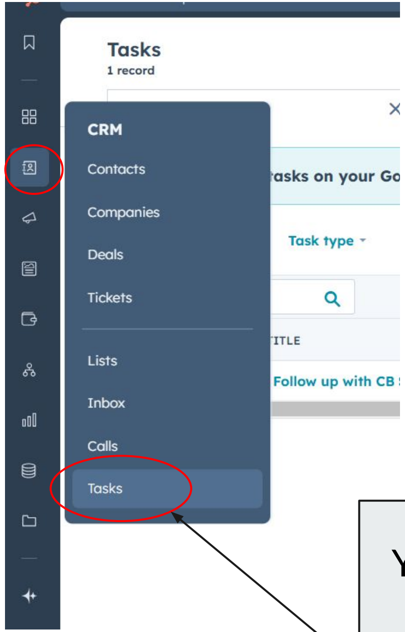


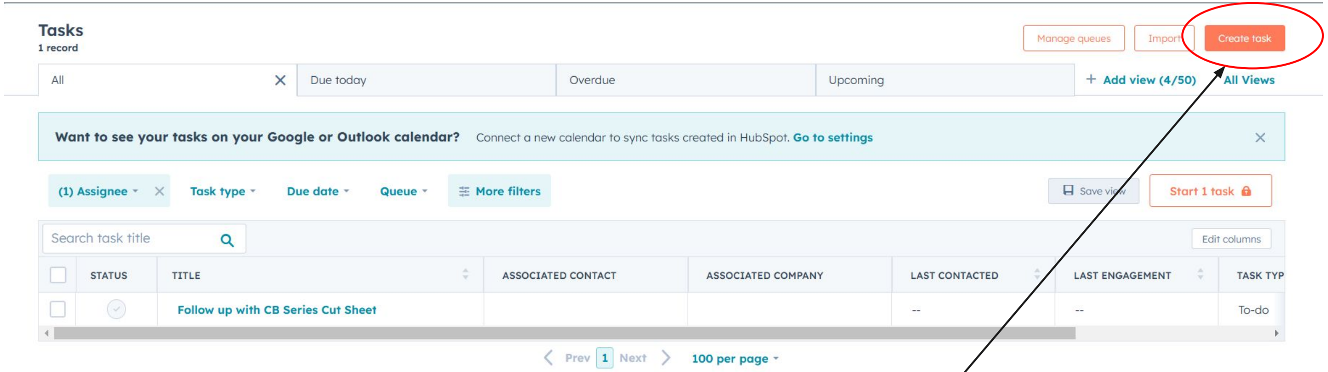
After your call, HubSpot will automatically prompt you to log the details and notes from the call. This is great for when you are on the go.

How to create tasks under a contact



How to create tasks under a contact

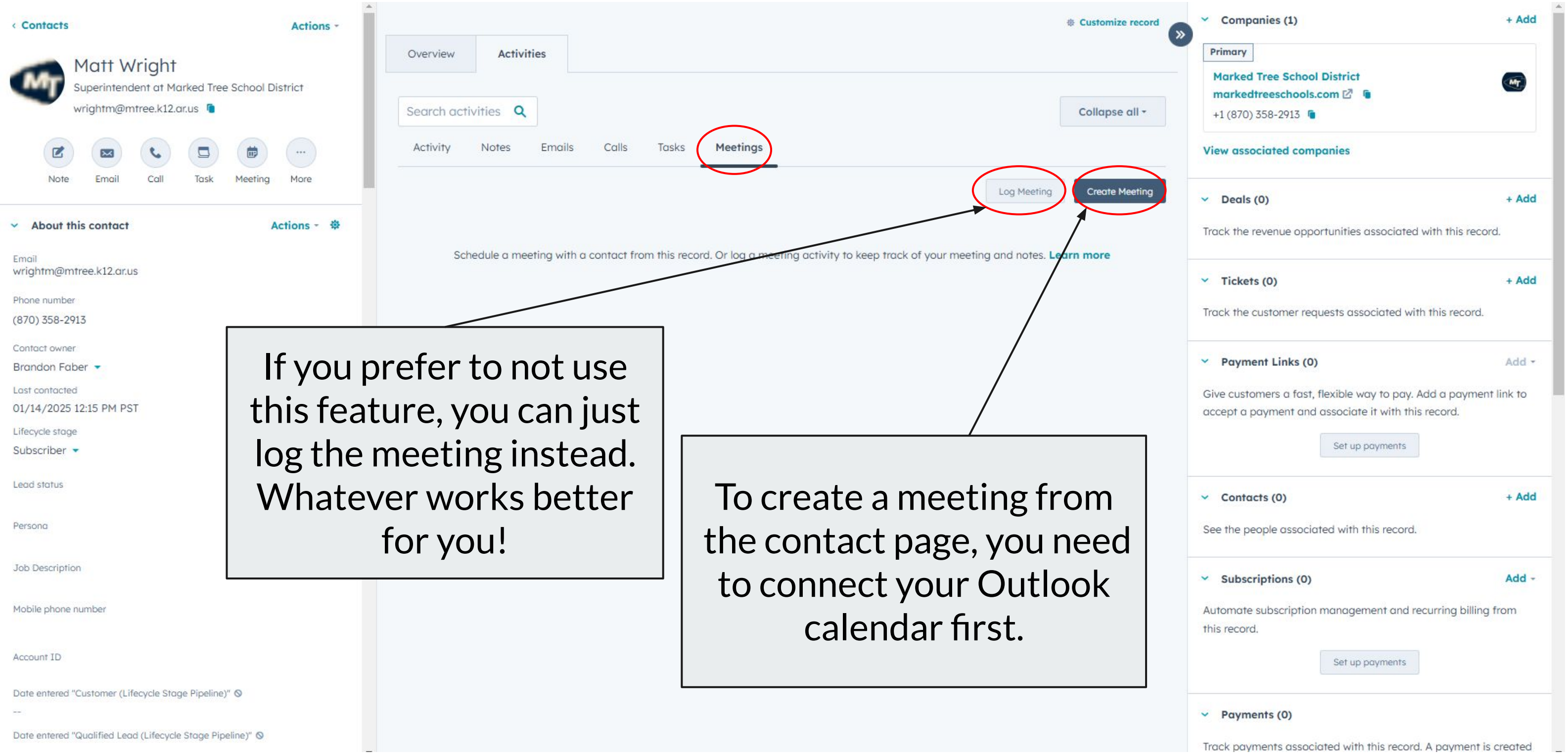




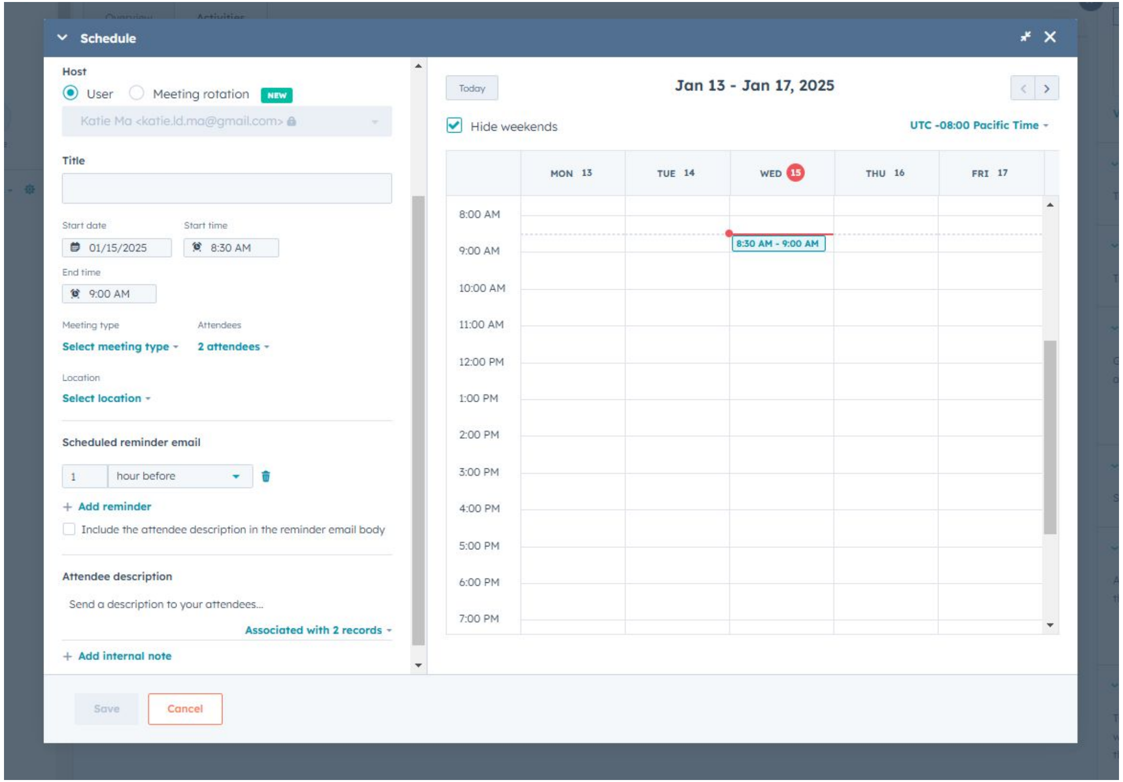
You can also find all of your tasks located here.

This is the home for all of your tasks. You can also create new tasks from here, you'd just need to pay attention the contacts/companies you are associating with a task created from this page.

How to create meetings under a contact



How to create meetings under a contact

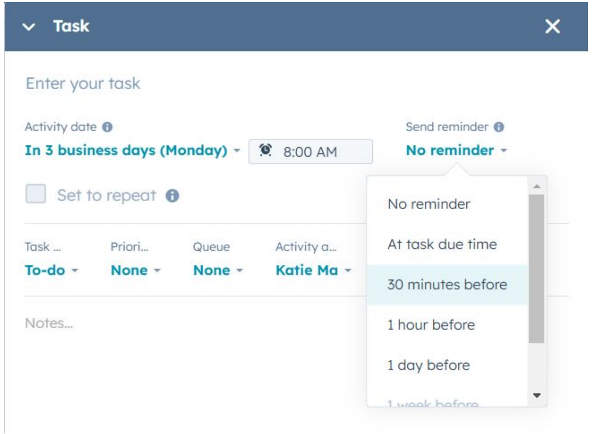


Fields to fill out:

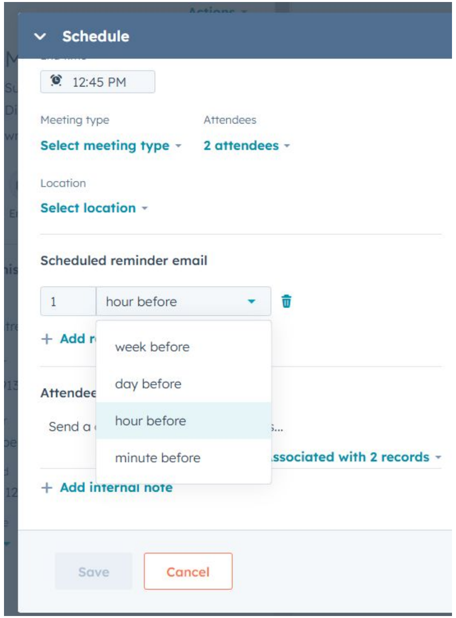
- Title
- Start date
- Start time
- End time
- Attendees
- Location
- Reminder email (optional)
- Attendee description to send to them (optional)

*Meeting rotation function is only available to Sales and Service Hub seats

How to set up reminders



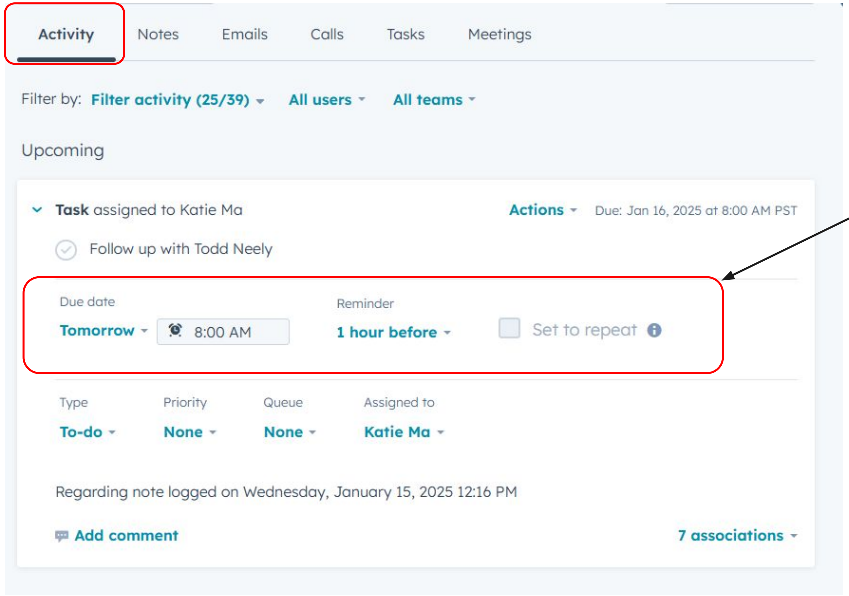
This is what the reminders look like for tasks. This reminder is an email reminder that will get sent to your Outlook inbox at the time you choose.



This is what the reminders look like for meetings.

How to set up reminders

You can create “To-do”, “Call”, or “Email” tasks under emails, log call, notes, and log meeting. You can then set another reminder within these tasks.

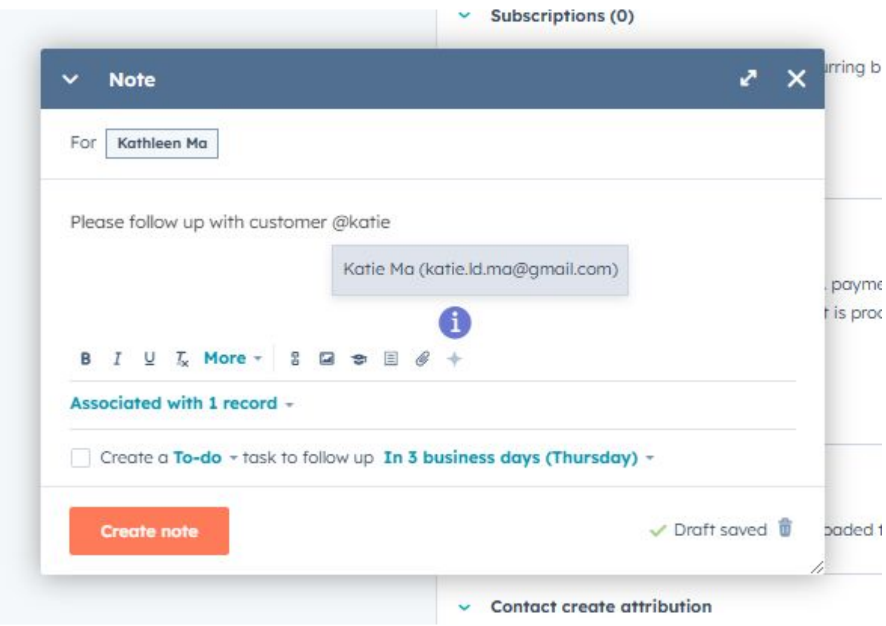


To find that “To-do” task, navigate to the “Activity” tab. You can set a reminder here as well.

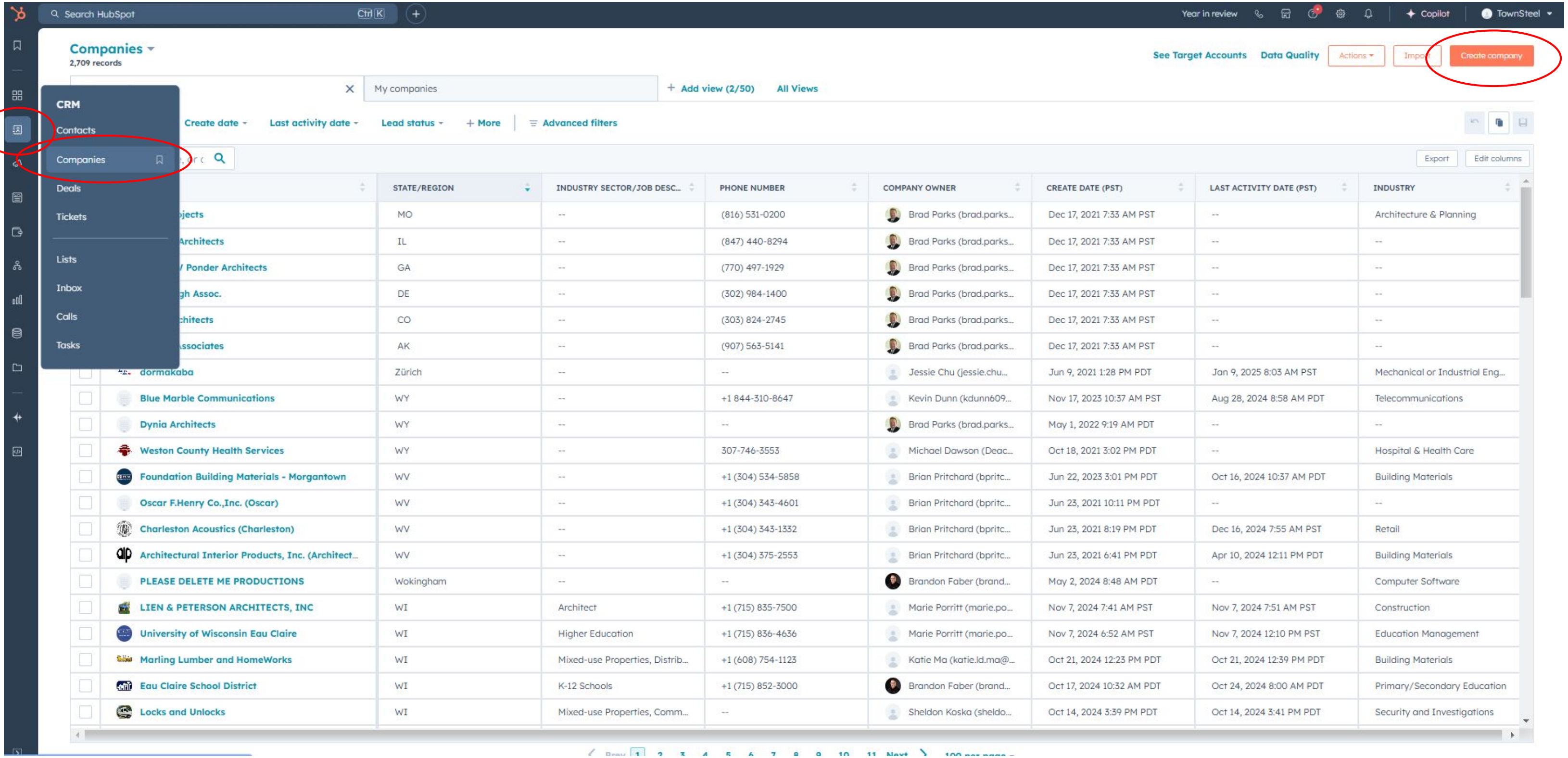
How to “@” other users

HubSpot allows you to “@” other uses within our organization to notify them and bring them into the conversation. You can use this feature in notes, emails, logging calls, tasks, and logging meetings.

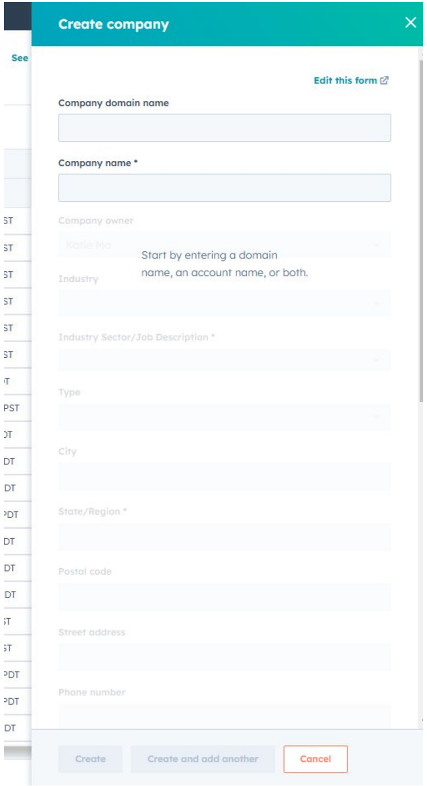
Simply type the “@” and type the email or name of the person. A popup of the user will appear - click on that and you will have successfully tagged that user. Once you create the note, the tagged user will be notified that you included them on a note/email/logged call/task/logged meeting.

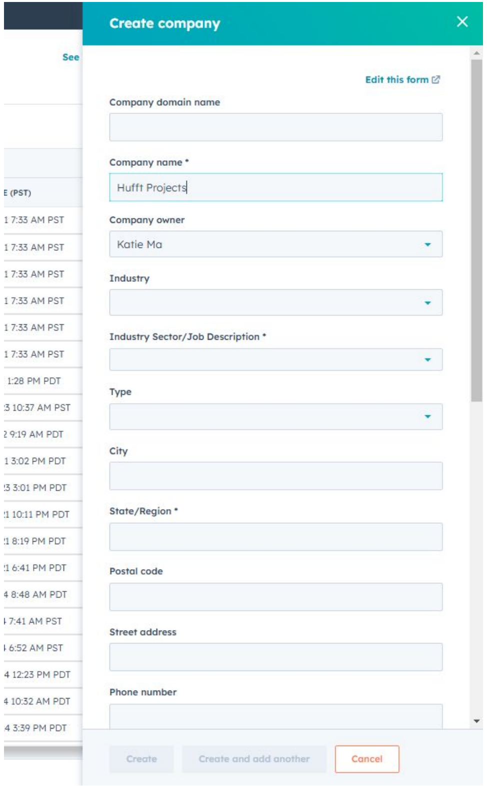


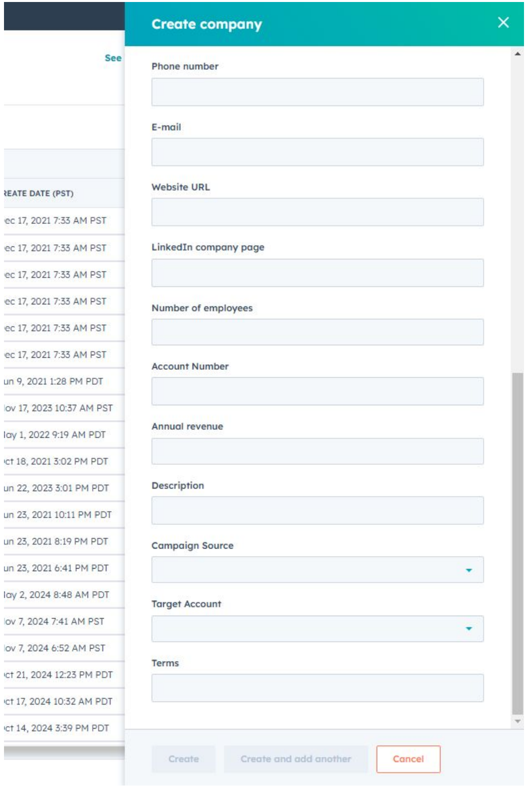
How to set up a company



How to set up a company







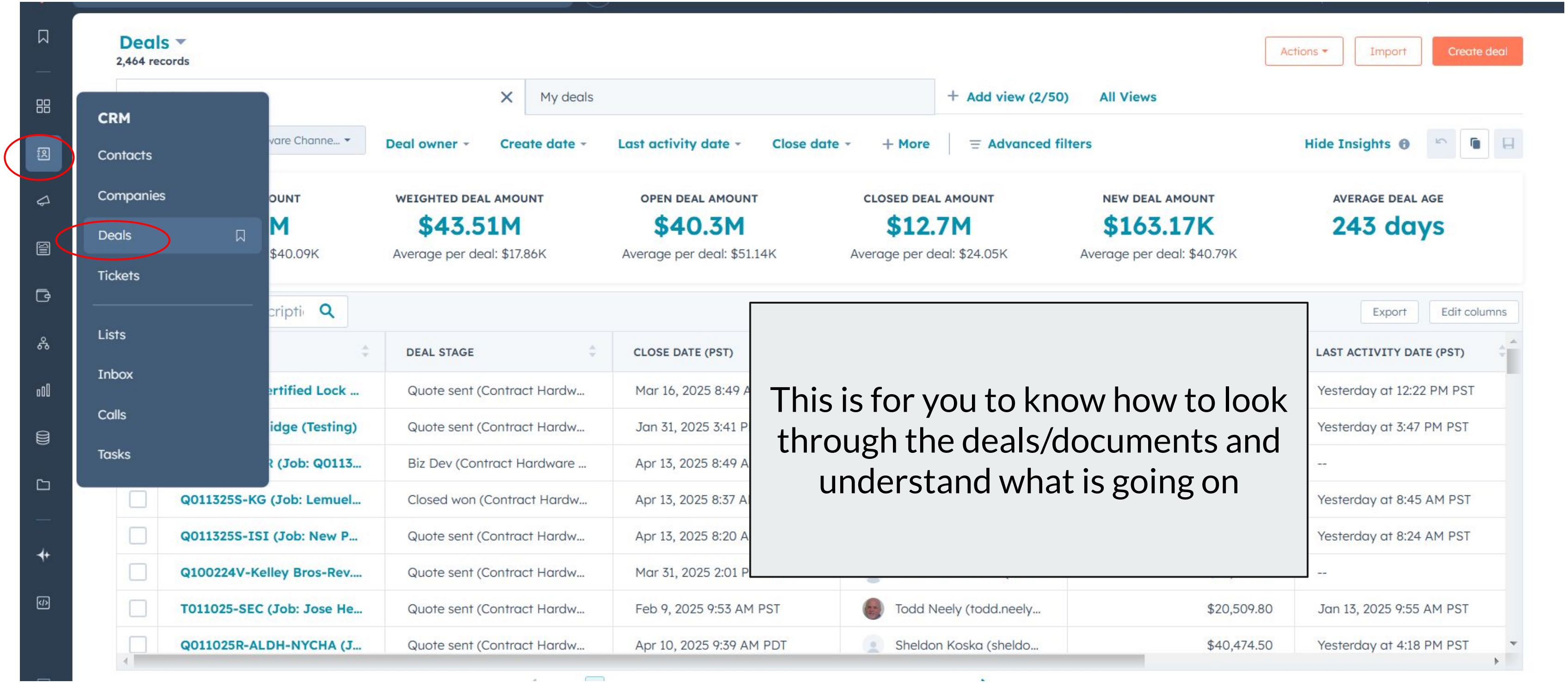
How to set up a company

Fields to fill out (required fields will have an * next to them):

- Company name*
- Company owner
- Industry
- Industry Sector/Job Description*
- Type
- City
- State/Region*
- Postal code
- Street address
- Phone number
- Email
- Website URL

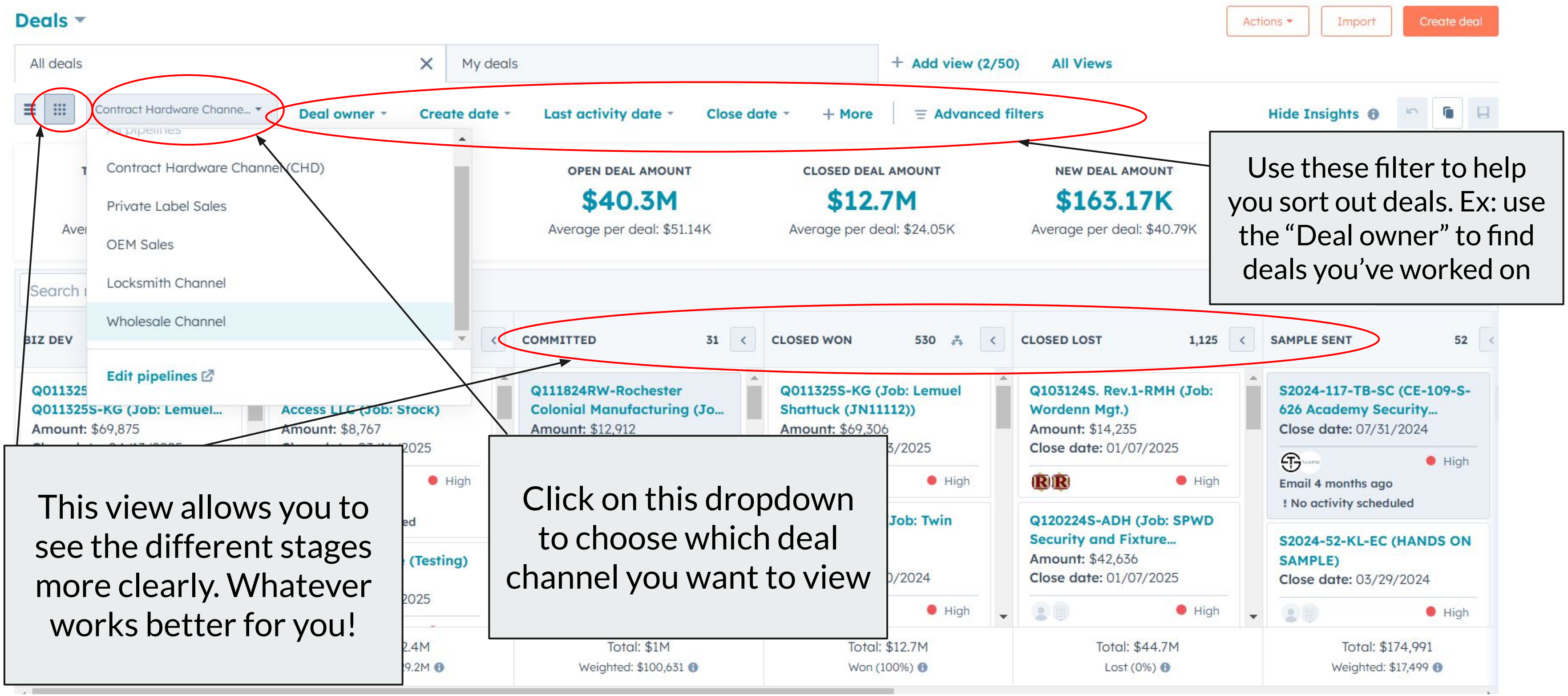
You will not be able to create the company if you do not fill out the required fields with the * next to them. Most of the other fields are not required, but it will help all of us if you have more information. You can always add in information later if you receive more later.

How to look at a deal



This is for you to know how to look through the deals/documents and understand what is going on

How to look at a deal



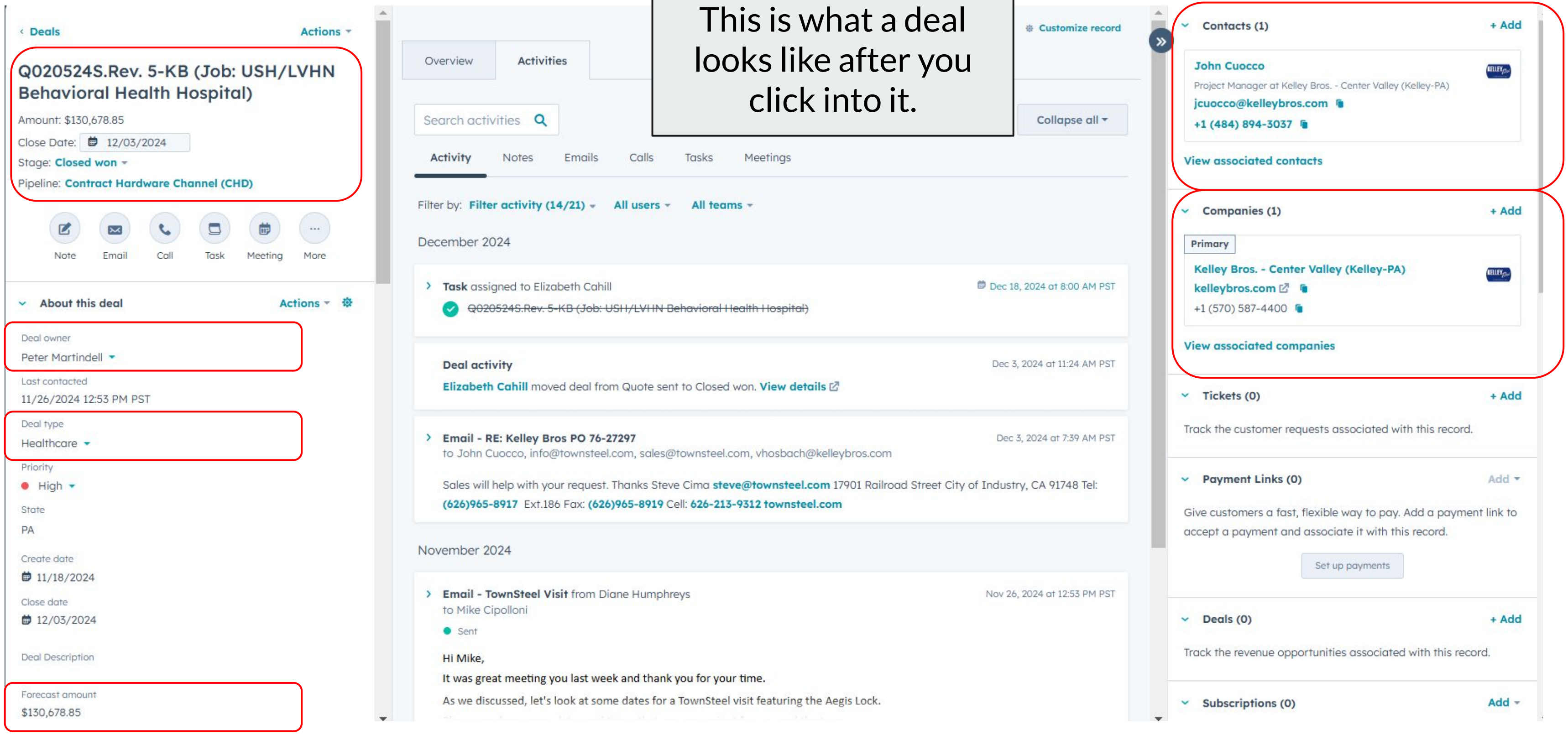
Use these filter to help you sort out deals. Ex: use the “Deal owner” to find deals you’ve worked on

This view allows you to see the different stages more clearly. Whatever works better for you!

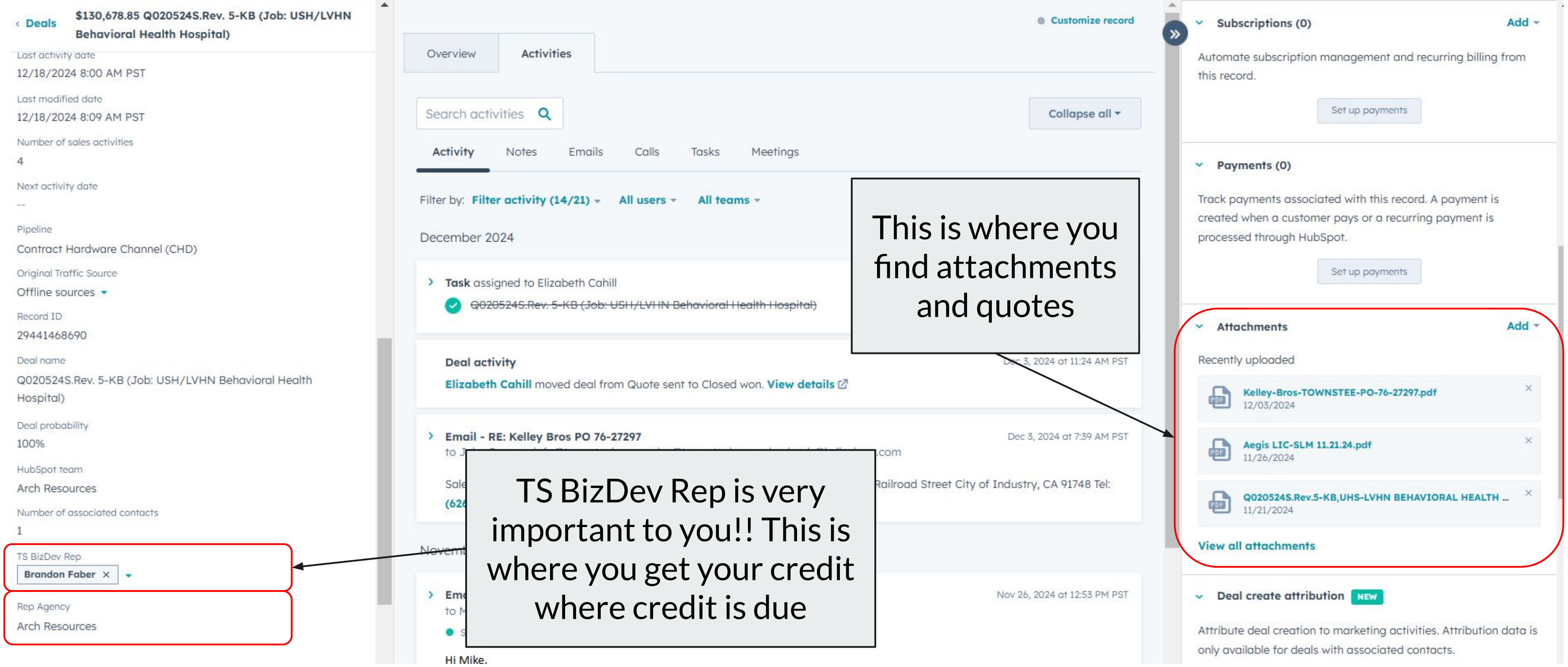
Click on this dropdown to choose which deal channel you want to view

How to look at a deal

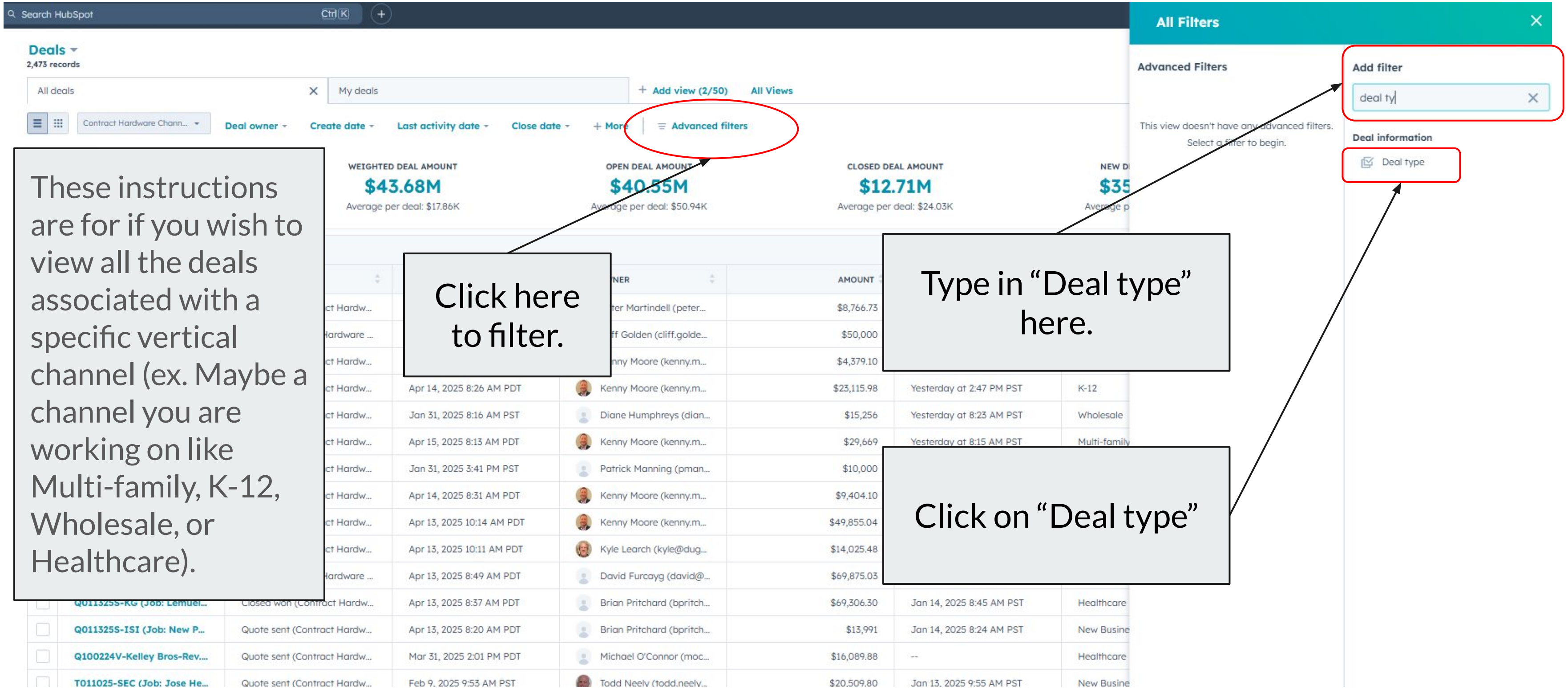
This is what a deal looks like after you click into it.



How to look at a deal



How to find deals within a vertical deal-type



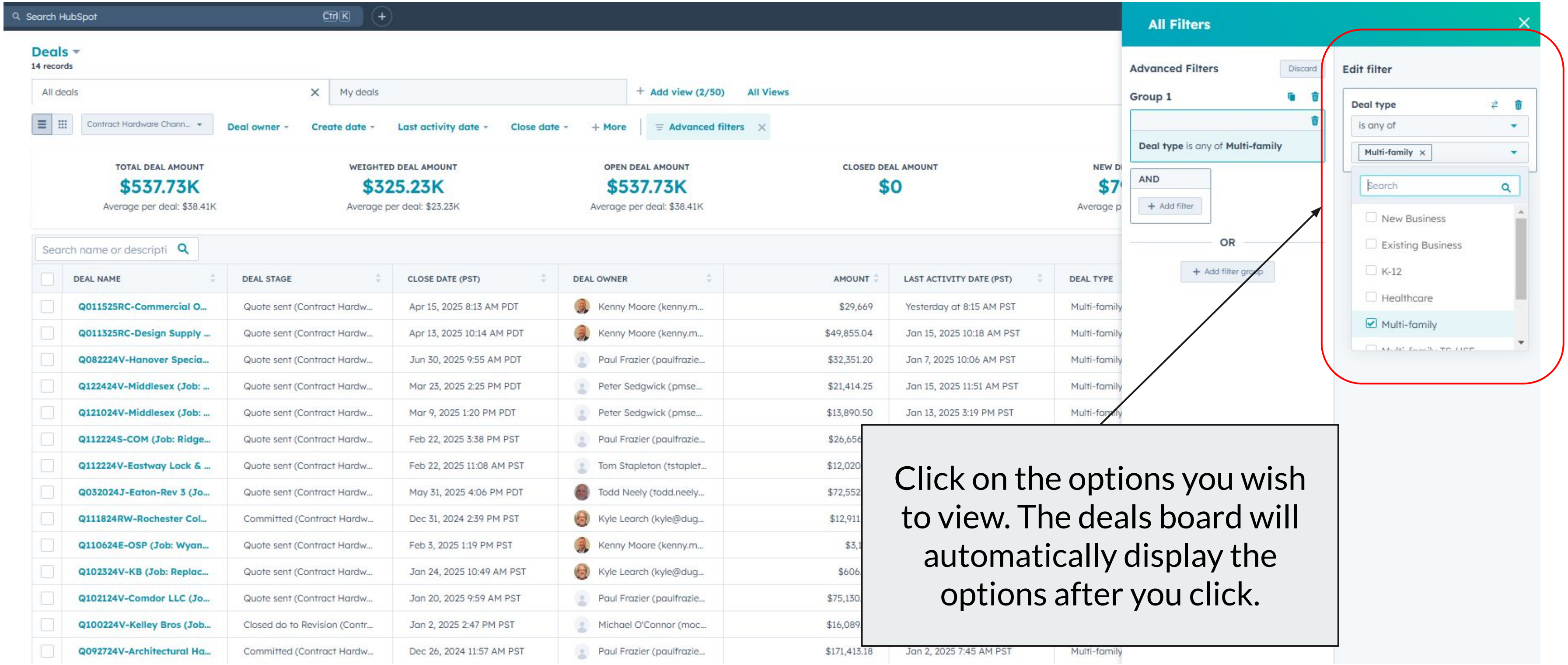
These instructions are for if you wish to view all the deals associated with a specific vertical channel (ex. Maybe a channel you are working on like Multi-family, K-12, Wholesale, or Healthcare).

Click here to filter.

Type in “Deal type” here.

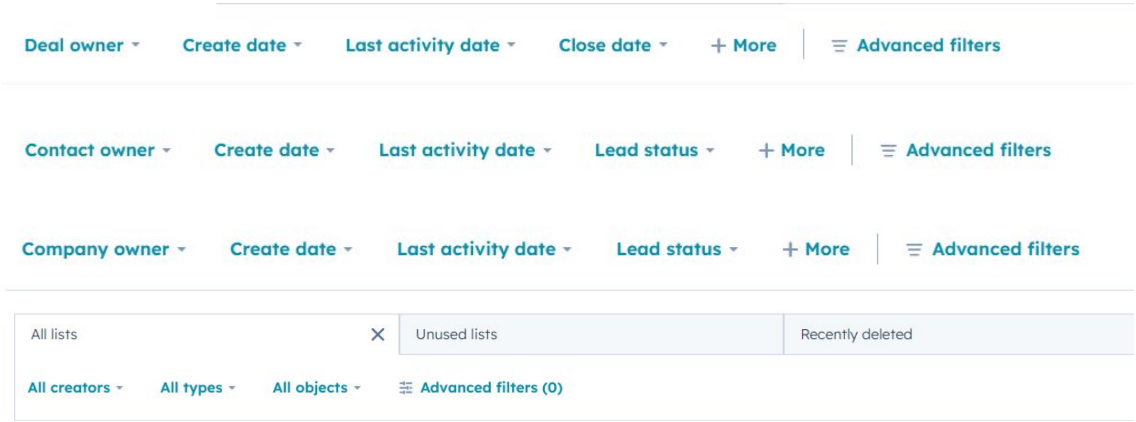
Click on “Deal type”

How to find deals within a vertical deal-type



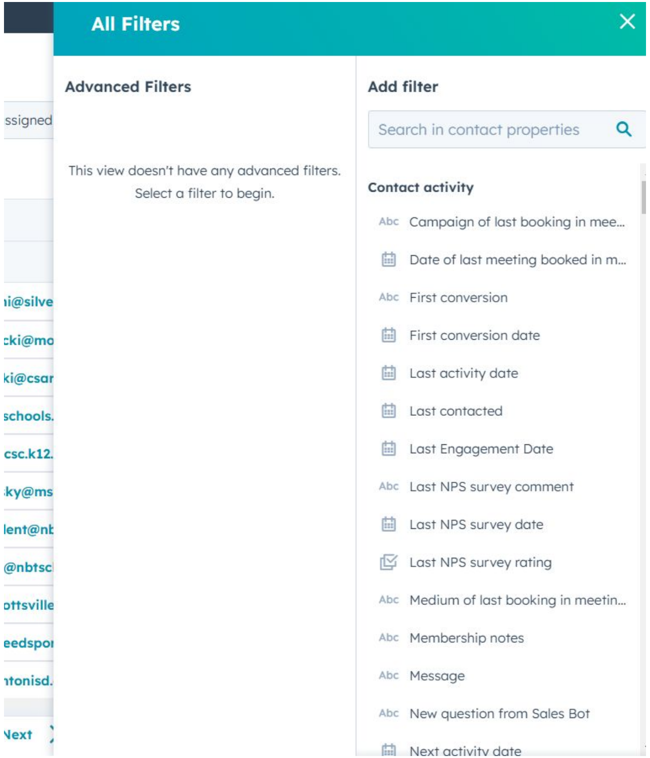
Click on the options you wish to view. The deals board will automatically display the options after you click.

How to use filtering



This is what the basic filter options look like for the deals, contacts, companies, and lists pages. Using these filters will make your life easier when organizing/looking for things.

How to use filtering



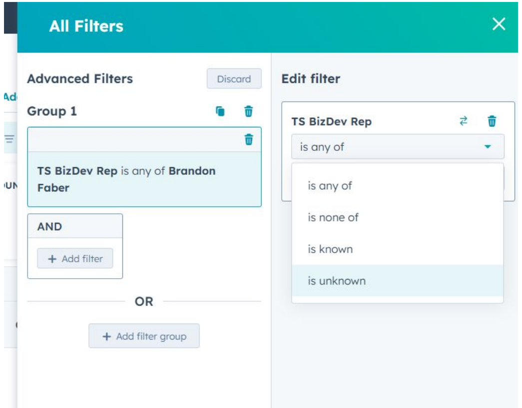
As briefly mentioned before, this is what the "Advanced Filters" button looks like:

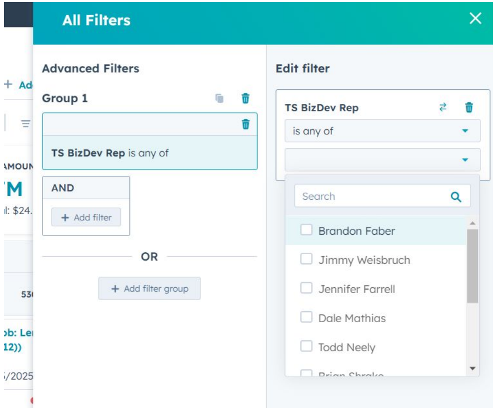
This filter allows you to sort your contacts/companies/deals/lists according to more specific information properties.

Type in the name of the specific property you are trying to sort by. Ex. "TS BizDev Rep" and click on it.

The information property you are searching for has to be one that is specific to the channel you are sorting (either contacts/companies/deals/lists). The information properties vary for all of them.

How to use filtering

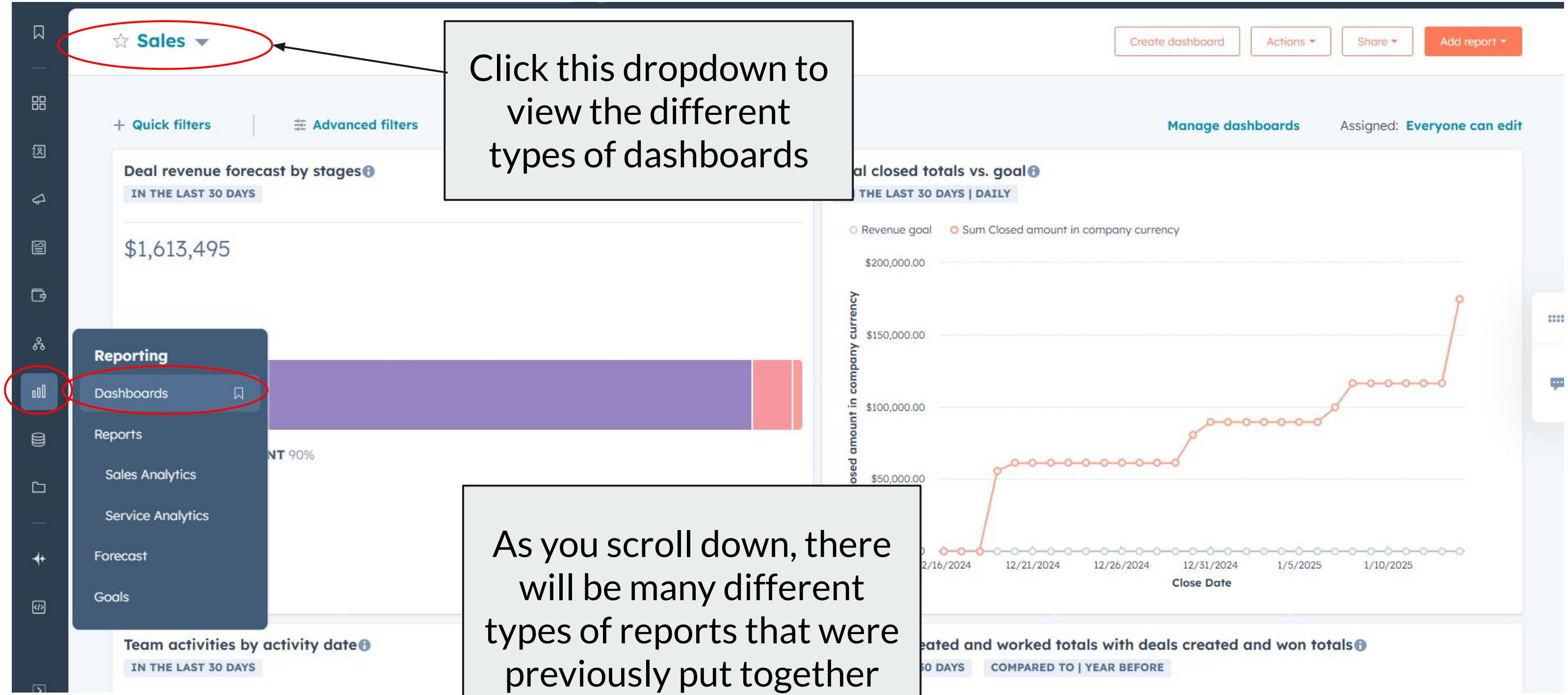




Once you click on the specific property you are trying to sort by, this window will pop up (it will vary depending on the property).

This is basically the concept of how advanced filtering works throughout all of HubSpot.

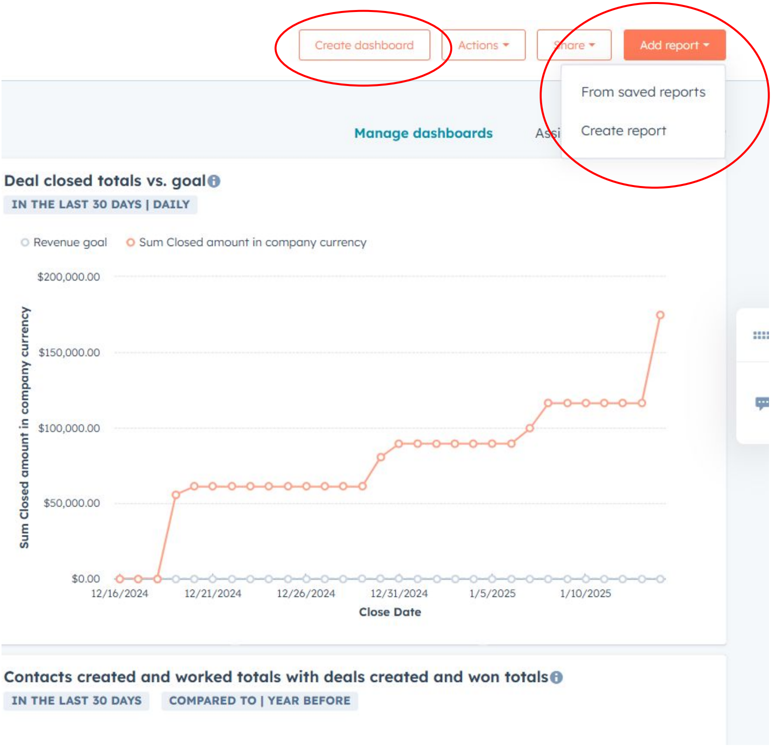
How to operate sales report dashboards



Click this dropdown to view the different types of dashboards

As you scroll down, there will be many different types of reports that were previously put together

How to make your own report and dashboard

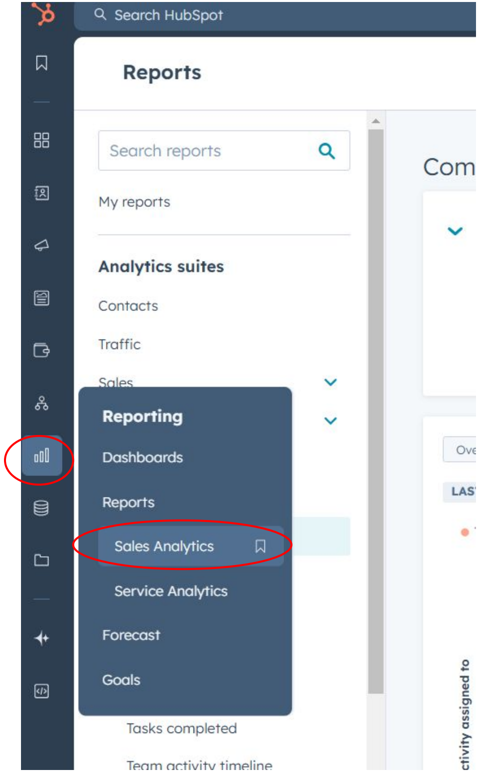


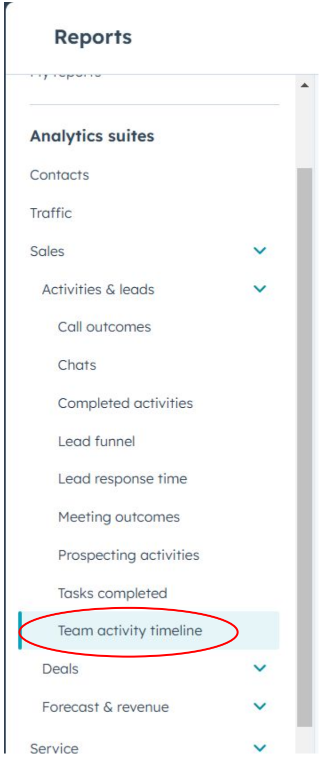
You can create a new dashboard or a new report from saved reports or from scratch. Please contact me if you would like to create a report and I can make it for you or show you how.

How to see all of your activities in one place

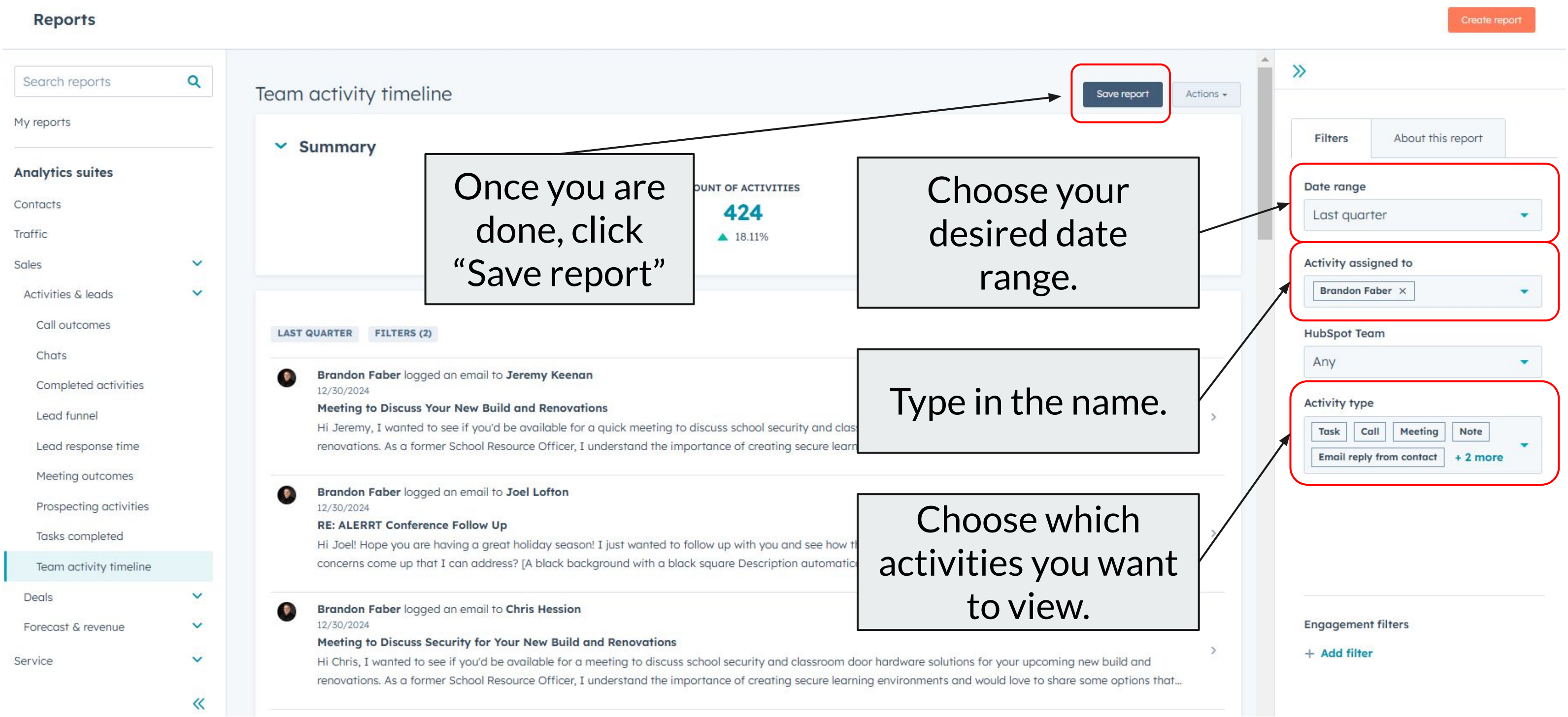
You keep track of all of your activities in one place by creating a “Team activity timeline” report. You can then save the report so you can have easy access to viewing all of your activities.

This is optional - you can do this if you think it will help with your own process.

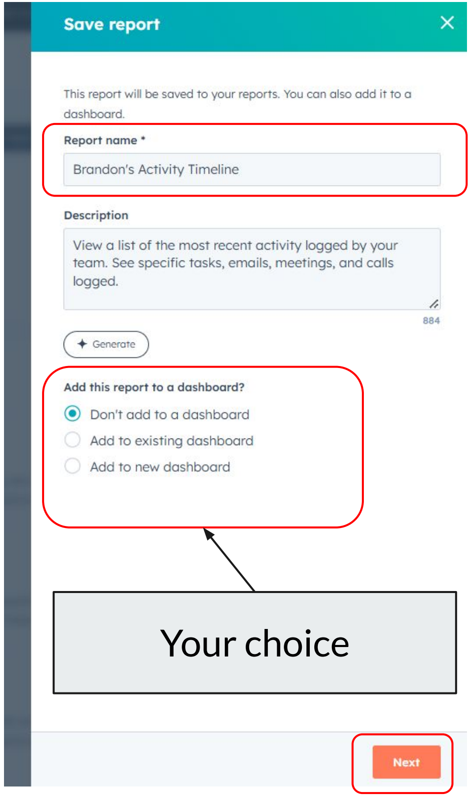




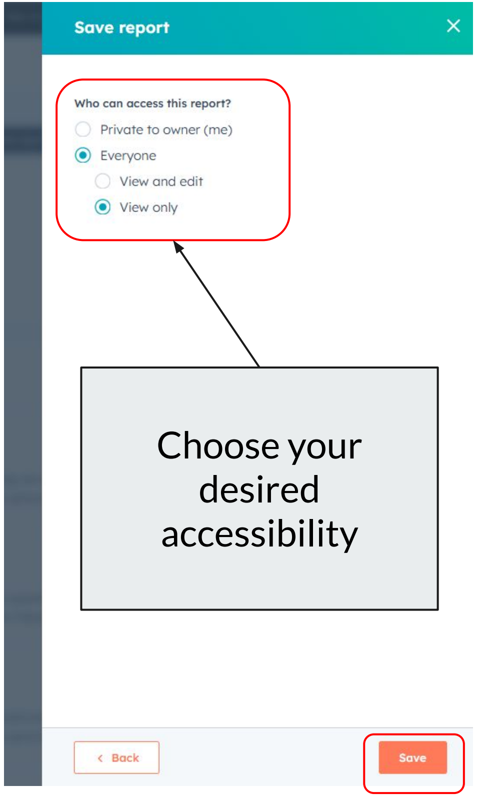
How to see all of your activities in one place



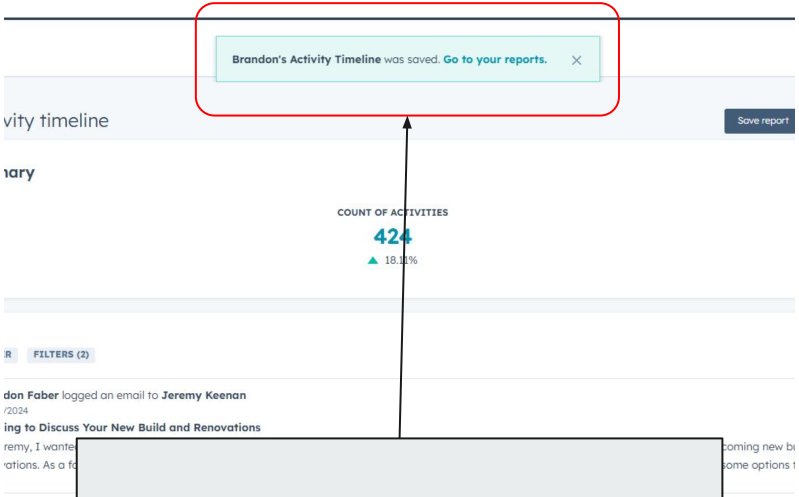
How to see all of your activities in one place



Your choice

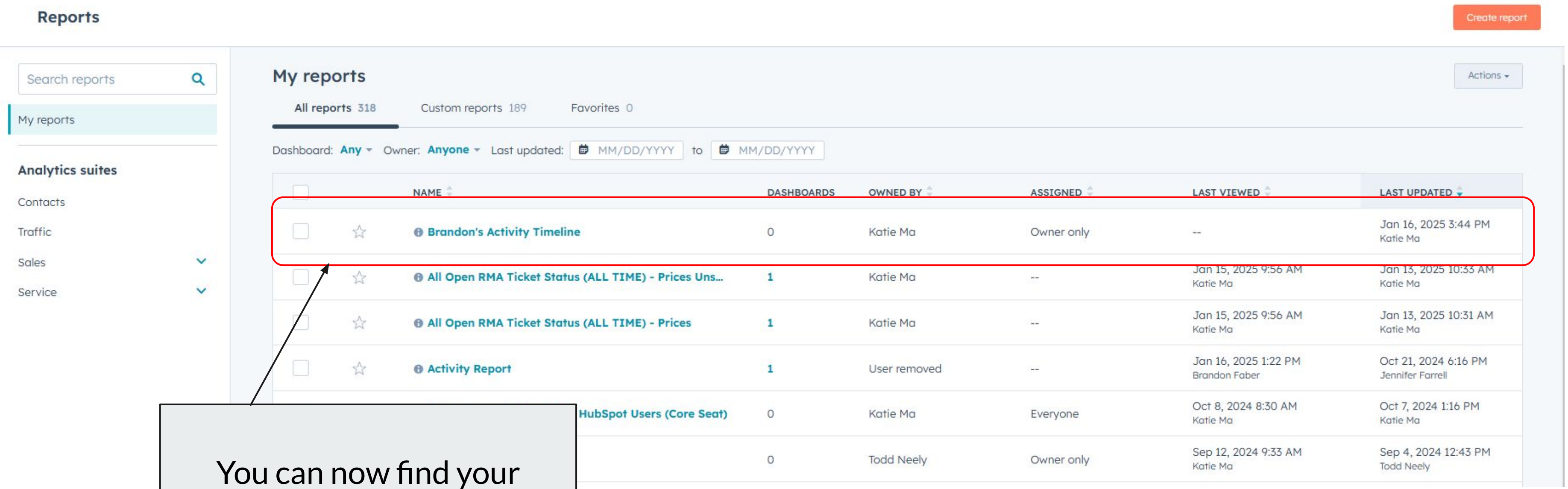


Choose your desired accessibility



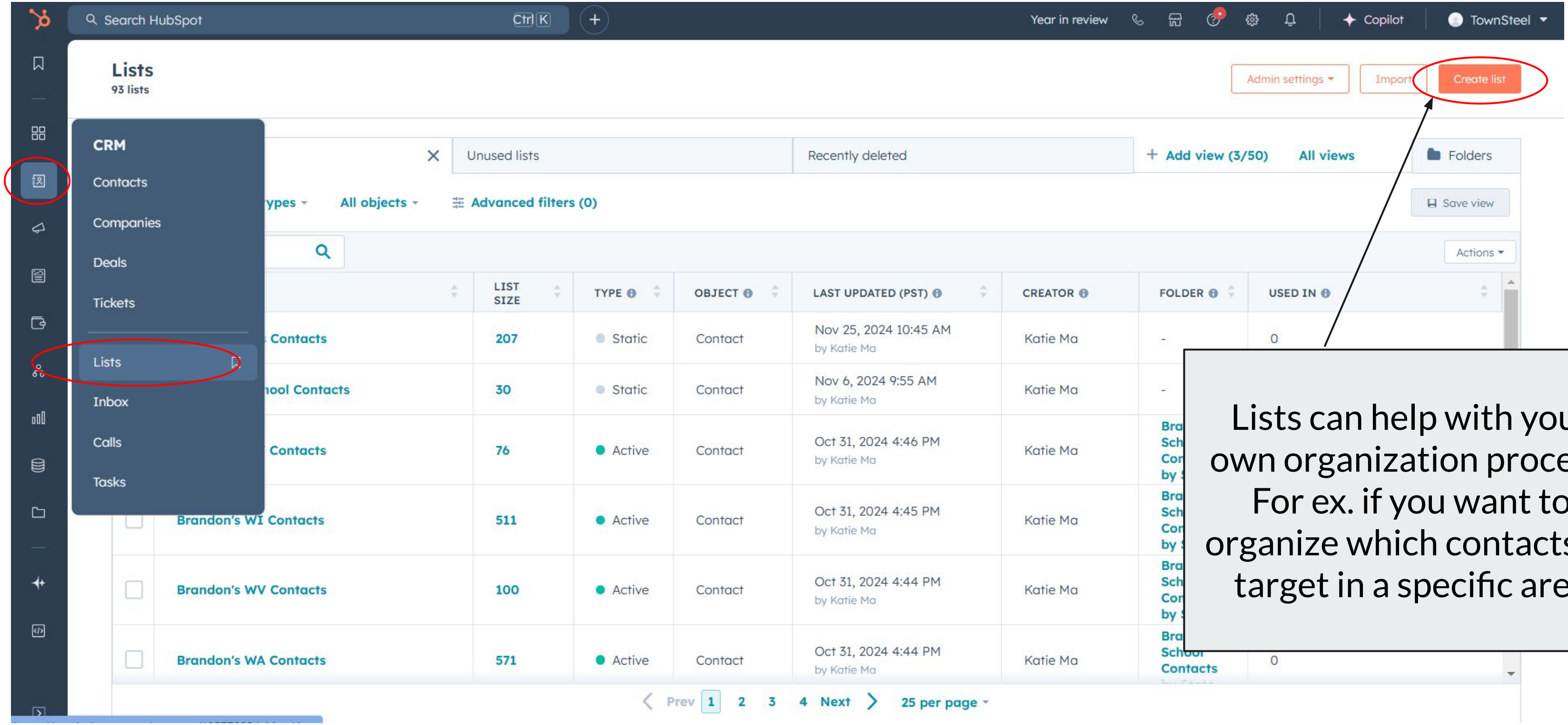
Your report is now successfully saved. Click on the link here or you can find it in the “Reports” tab.

How to see all of your activities in one place



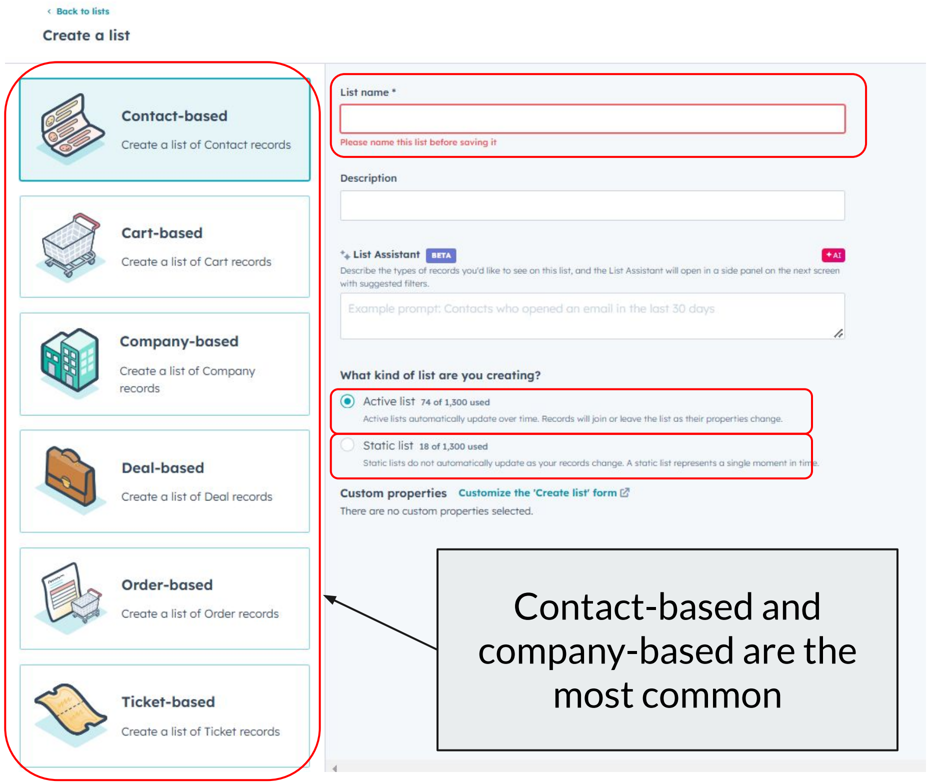
You can now find your saved report in the "Reports" tab

How to create lists



Lists can help with your own organization process. For ex. if you want to organize which contacts to target in a specific area

How to create lists



List name is required.

Active lists automatically update over time according to custom filters and changing records. This feature is mostly used by marketing, so no need to worry too much about this.

Static lists do not automatically update over time, although they still require using custom filters. You create the list and it stays that way. Please contact katie.ma@townsteel.com if you need a list/help and I can make it for you.