



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

The image shows a screenshot of the HubSpot settings interface. The top navigation bar includes a search bar, keyboard shortcuts (Ctrl | K), and user information (Year in review, Copilot, TownSteel). The left sidebar contains navigation options: Back to Marketing Email, Settings, Your Preferences (circled in red), Account Management, and Product Updates. The main content area is titled 'General' and has tabs for Profile, Email (circled in red), Calling, Calendar, Tasks, and Security. Below the tabs, there is a section for 'Email' with a sub-section 'EMAIL' showing a connected account for 'katie.ma@townsteel.com' with an 'Inbox type: Outlook 365'. A button labeled 'Connect personal email' (circled in red) is highlighted with a red circle and an arrow pointing to it. A callout box on the right provides a detailed view of the 'Email' settings, showing the 'Connect personal email' button with a red arrow pointing to it, and a list of checked options: 'Send and schedule emails from HubSpot', 'Log email replies to HubSpot automatically', and 'Suggest follow-up tasks and capture contact details from your email'. The callout box also features an illustration of an envelope with a checkmark.

Search HubSpot [Ctrl | K] Year in review Copilot TownSteel

Back to Marketing Email

Settings

Your Preferences

General

Account Management

Account Defaults

Audit Log

Users & Teams

Product Updates

Integrations

Marketplace Downloads

Tracking & Analytics

Privacy & Consent

Security

Routing

General

Profile Email Calling Calendar Tasks Security

These preferences only apply to you. For account level email management, go to [email logging settings](#).

Email

Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage any team emails, go to [inbox settings](#).

EMAIL

katie.ma@townsteel.com
Inbox type: Outlook 365

Connect personal email

Configure

Add email alias

An email alias allows emails sent outside of HubSpot to be associated with your user. [Learn more](#).

Manage email signatures

Your signature will be used in one-on-one emails through the HubSpot CRM and as a personalization token for marketing emails.

Include unsubscribe link **RECOMMENDED**

Include a link at the bottom of your emails allowing recipients to unsubscribe. It will help you stay compliant with local spam laws and improve deliverability.

[Edit unsubscribe link](#)

Profile Email Calling Calendar Tasks

These preferences only apply to you. For account level email management, go to [email logging settings](#).

Email

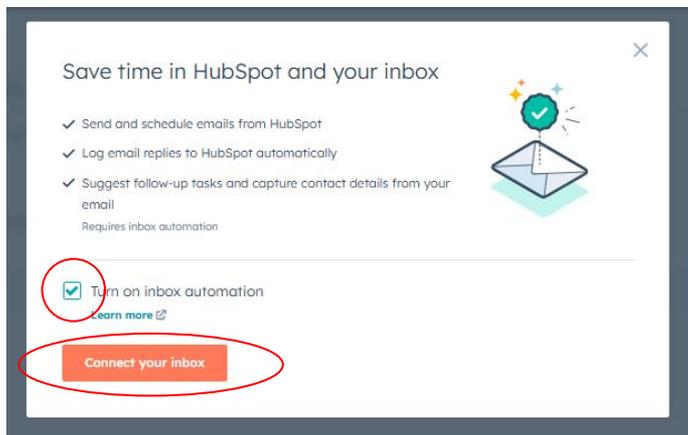
Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage any team emails, go to [inbox settings](#).

Connect personal email

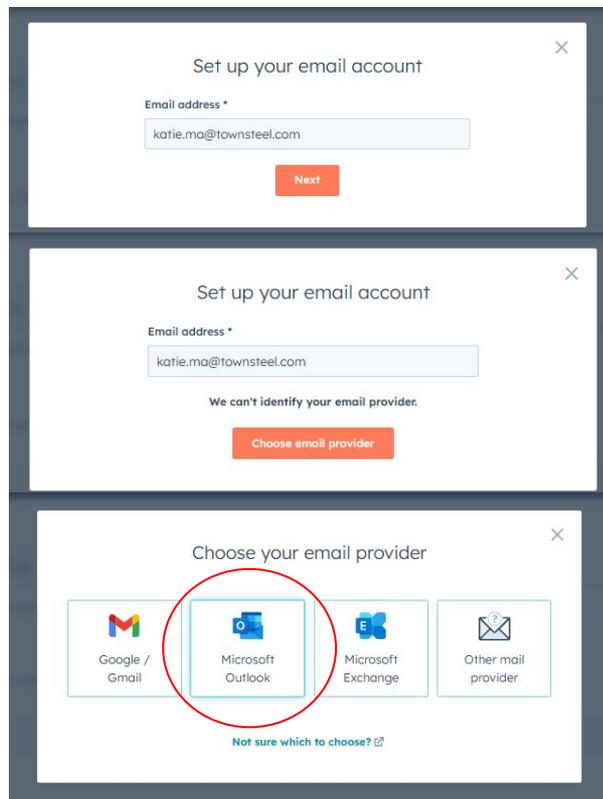
- ✓ Send and schedule emails from HubSpot
- ✓ Log email replies to HubSpot automatically
- ✓ Suggest follow-up tasks and capture contact details from your email
Requires inbox automation

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 incoming/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)

General

Profile | Email | Calling | **Calendar** | Tasks | Security

These preferences only apply to you.

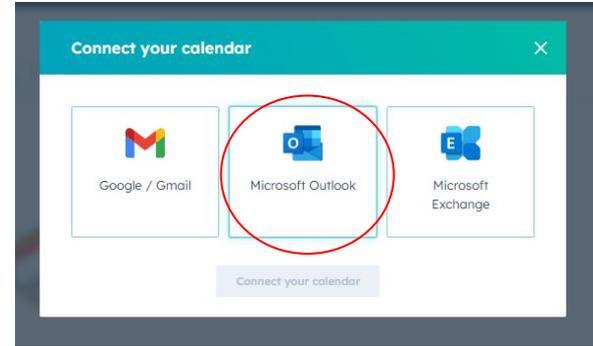
Calendar

Connect your calendar to use HubSpot Meetings and calendar sync.

- ✓ Send meetings directly from HubSpot
- ✓ Log outgoing meetings automatically
- ✓ Sync your calendar so contacts can schedule time with you
Requires Calendar Sync
- ✓ 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



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)

Account Settings

Manage your calendar accounts

Calendar Sync

Calendar sync logs new meetings from your primary calendar to existing contacts in HubSpot.

Tasks Calendar Sync

Create and connect a new calendar to see HubSpot tasks on your calendar. [Learn more.](#)

Connect your calendar 

Meeting Scheduling Pages

A personal scheduling page that allows contacts to book available times directly to your account's primary calendar.

Availability Calendars

Select which calendars you want to use to determine your availability for bookings

Calendar 

Don't see your calendar? Your calendar must be tied to the same email address you're using with the meetings tool. [Learn more.](#)

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

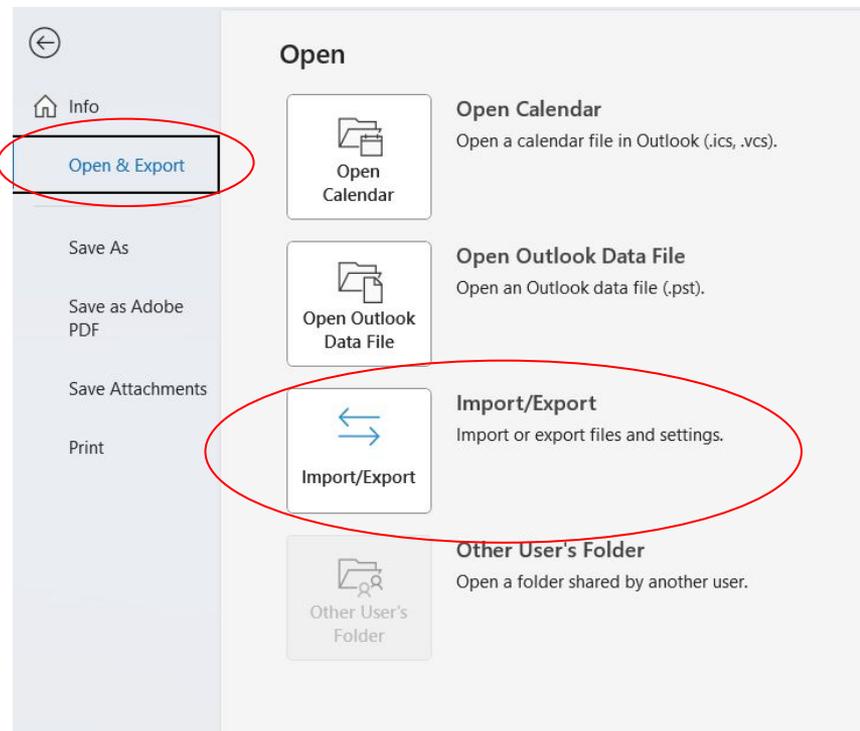
How to import existing contacts into HubSpot contacts

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

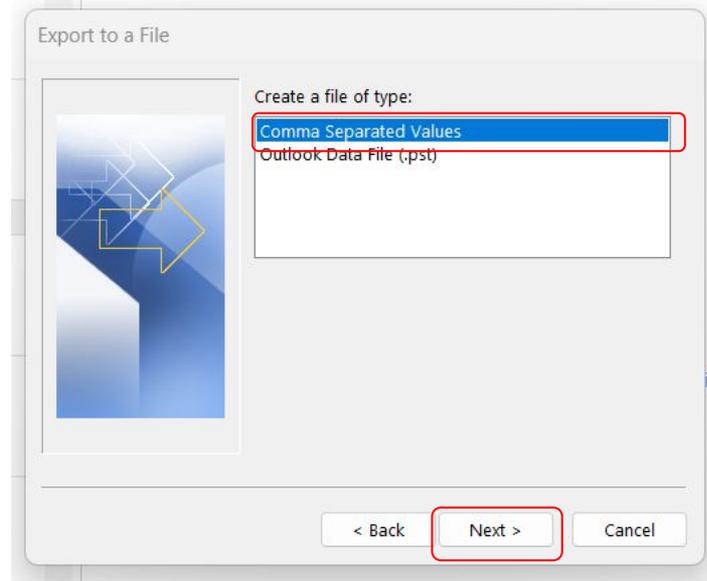
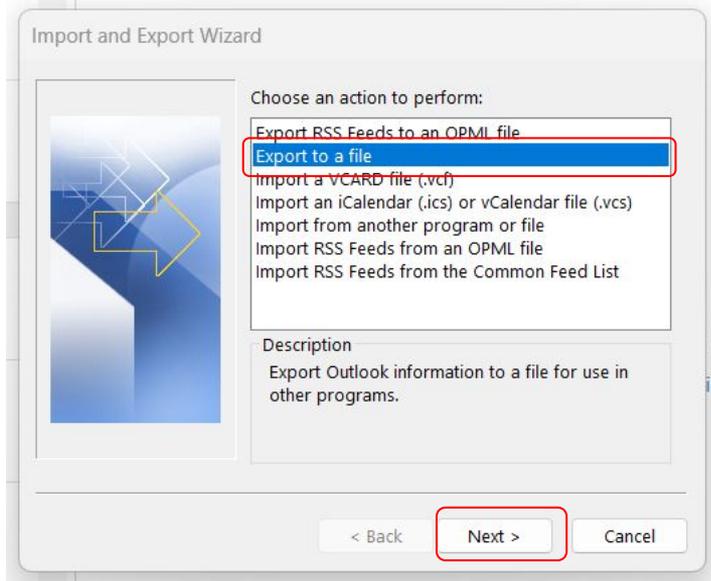
- Be a .csv, .xlsx, or .xls file.
- Have only one sheet.

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

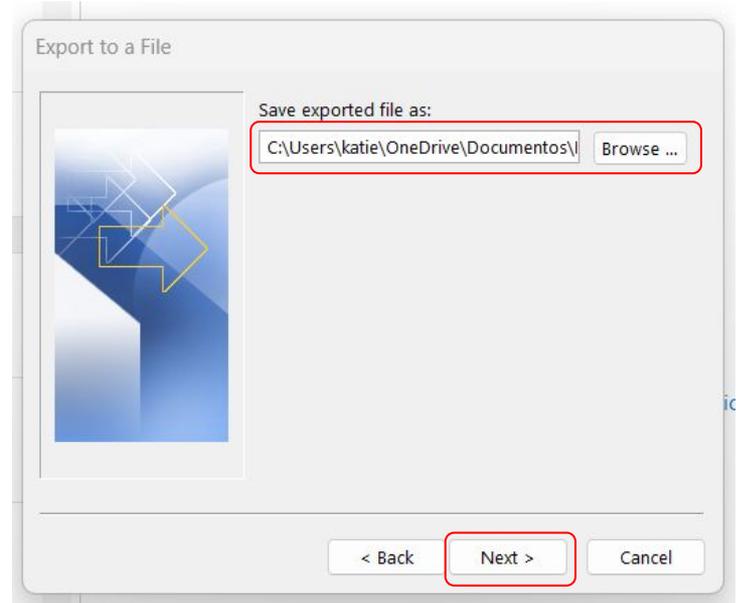
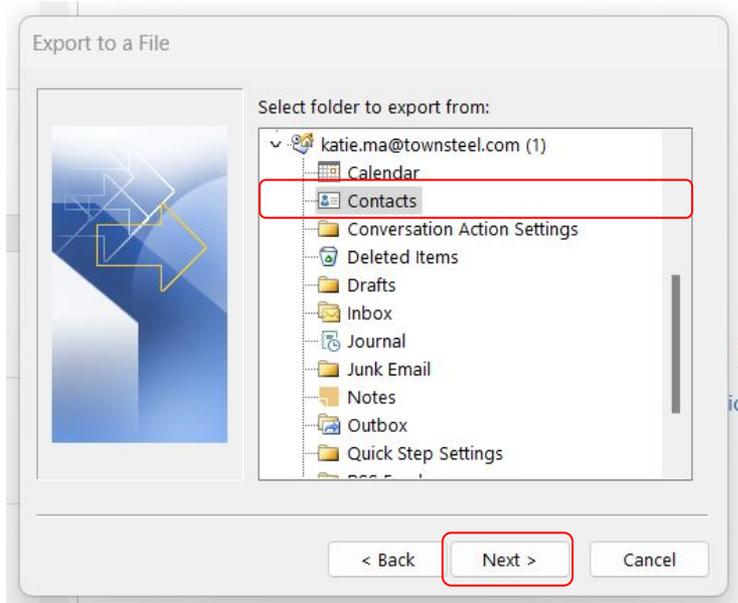
First, navigate to “File”. Then, click “Open & Export” and then “Import/Export”.



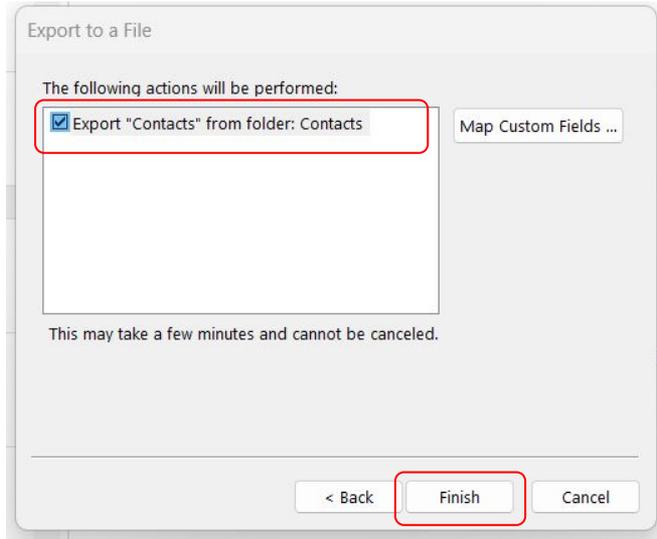
How to import existing contacts into HubSpot contacts



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.

Add data to HubSpot

The screenshot shows three main options for adding data to HubSpot:

- Import from files:** One-time import of contacts and more from spreadsheets. Includes an 'Import a file' button.
- Sync from apps:** Keep data synced between HubSpot and dozens of other apps. Includes a 'Sync an app' button.
- Migrate your contacts:** Get a specialist to help your current list. Includes a 'Sign up to migrate' button.

Past imports

NAME	NEW RECORDS	UPDATED RECORDS
National School Safety Conference Leads.xlsx Contacts	View Contacts More	58
hubspot-crm-exports-school-safety-pull-email-list-2024-07-18_copy.valids.csv Contacts		3
NASRO 2024 Leads Contacts		1
NASRO Conf. 2024 - Attendee Opt-In List - 7-8.xlsx Contacts		2

View contacts list

Add imported contacts to list

Download Contacts file

Use as template for new import

How to import existing contacts into HubSpot contacts

How would you like to start?

Data Quality

Actions

Import

Create contact

Add it to the CRM



Contacts, companies, and other CRM data

- Create, update and associate a variety of CRM objects in bulk
- Create lists from your imported contacts
- Easily replace errored values in your file as you import

Start import

Repeat a past import



List of contacts to opt-out of emails

Import contacts who have requested to opt-out of communication.

Add data to datasets



Use datasets to prep your data for reporting and analysis

- Join your imported data with HubSpot records or other imported sources
- Perform powerful calculations on properties within your dataset
- Create custom reports based on your imported data that refresh automatically

Import into datasets

NEW

Need help getting started?

[View import guide](#) [Download sample spreadsheet](#) [View the FAQ](#)



Import from files

One-time import of contacts and more from spreadsheets.

Import a file



Sync from apps

Keep data synced between HubSpot and dozens of other apps.

Sync an app



Migrate your data

Get a specialist to help you migrate from your current tech stack.

Sign up to migrate

How to import existing contacts into HubSpot contacts

What kind of data is in your file?

Select one or more of the objects you want to create and associate.

Understand how HubSpot structures your data into objects using the [data model overview tool](#).

Companies
The businesses you work with, which are commonly called accounts or organizations.

Contacts
The people you work with, commonly called leads or customers.

Deals
The revenue connected to a company, which is commonly called an opportunity.

Line items
The product or service that is being sold on a particular deal or quote.

Products
The products your business sells which will be part of your product library.

Tickets
The issues created from a customer's request for help.

Activities

Calls
Calls between you and a customer.

Emails
Emails between you and a customer.

Meetings
Information about a meeting you had with a customer.

Notes
Any extra info you wrote down about a contact, company, or deal.

Tasks
Tasks to be done.

Upload your files

Before you upload your files below, make sure your file is [ready to be imported](#).

Learn how HubSpot knows when your records are [duplicates](#).

Contacts file



Drag and drop or [choose a file](#) to upload your Contacts.

All .csv, .xlsx, and .xls file types are supported.

[Download example file](#)

Choose how to import Contacts

Create and update Contacts

Same-object associations

Create Contact-Contact associations with this import

Select the language of the column headers in your file

Identifying the language of the column headers in your file allows us to accurately map them to existing HubSpot properties. [Learn more](#)

English

Tip: press Enter/Return to continue

Next >

How to import existing contacts into HubSpot contacts

Map columns in your file to contact properties

Learn how to [import records and activities](#)

Mapping Guide

> **Contact** Ready to import Contacts

0 errors found, of 36 rows scanned

All mapped statuses

Search columns

COLUMN HEADER FROM FILE	PREVIEW INFORMATION	MAPPED	IMPORT AS	HUBSPOT PROPERTY	MANAGE EXISTING VALUES
Record ID	66691235230 19594405505 4015051		Contact properties	Choose or create a proper...	Don't overwrite
First Name	Jared Ronli Mike	✓	Property Contact properties	First Name	Don't overwrite
Last Name	Brucker Kordahl Yates	✓	Don't import column	Last Name	Don't overwrite
Email	jared.brucker@wes... ronli.kordahl@bann... mike.yates@adnh...	✓	Contact properties	Email	Don't overwrite
Phone Number	+18445225275 +18883620750 +16142518037	✓	Contact properties	Phone Number	Don't overwrite
Contact owner	Kenny Moore Diane Humphreys Brian Pritchard	5 errors fixed	Contact properties	Contact owner	Don't overwrite

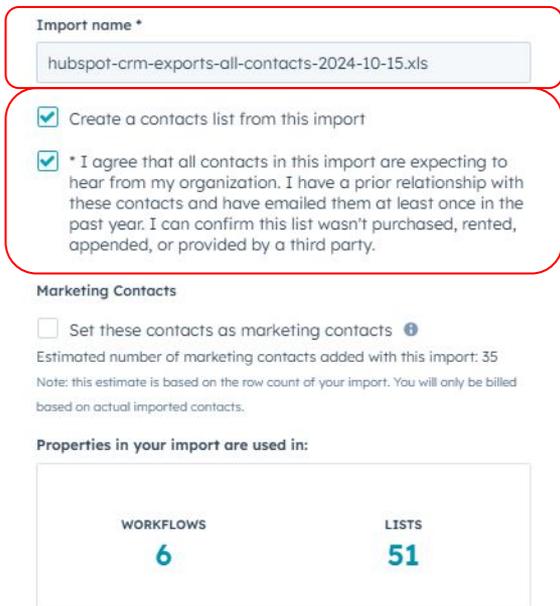
If you have any additional columns (that are not the previously mentioned required properties), you can choose to not import them. Once, you map out all of your columns, the “Next” button will appear and you will be able to proceed.

You have 6 unmapped columns

Don't import data in unmapped columns Next >

How to import existing contacts into HubSpot contacts

A few final details



Import name *

hubspot-crm-exports-all-contacts-2024-10-15.xls

Create a contacts list from this import

* I agree that all contacts in this import are expecting to hear from my organization. I have a prior relationship with these contacts and have emailed them at least once in the past year. I can confirm this list wasn't purchased, rented, appended, or provided by a third party.

Marketing Contacts

Set these contacts as marketing contacts ⓘ

Estimated number of marketing contacts added with this import: 35
Note: this estimate is based on the row count of your import. You will only be billed based on actual imported contacts.

Properties in your import are used in:

WORKFLOWS	LISTS
6	51

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

The screenshot displays the HubSpot CRM interface. At the top, there is a search bar for HubSpot and a navigation bar with various icons. The main header shows 'Contacts' with 36,215 records. Below this, there are tabs for 'My contacts' and 'Unsigned contacts', along with an 'Add view (5/50)' button and 'All Views'. A 'Data Quality' section includes 'Actions' and 'Import' buttons. A red circle highlights the 'Create contact' button in the top right corner. On the left side, a CRM sidebar is open, showing a list of CRM modules: CRM, Contacts, Companies, Deals, Tickets, Lists, Inbox, Calls, and Tasks. The 'Contacts' module is highlighted with a red circle. Below the sidebar, a table of contacts is visible, with columns for STATE/REGION, JOB DESCRIPTION, EMAIL, PHONE NUMBER, CONTACT OWNER, CREATE DATE (PST), and MARKETING CONTACT. The table contains several rows of contact information, including names like Lucia Pancini, Robert Zywicki, Mzyrokowski, Jzylstra, Dzylstra, Joe Zydowsky, and Brian Zychowski.

STATE/REGION	JOB DESCRIPTION	EMAIL	PHONE NUMBER	CONTACT OWNER	CREATE DATE (PST)	MARKETING CONTACT
--	--	lucia.pancini@silverlightar...	--	Luis Ramos (luis@town...	Jul 5, 2021 7:13 PM PDT	Non-marketing cont
NJ	--	robert.zywicki@motsd.org	(973) 691-4000	Brandon Faber (brand...	May 1, 2024 8:01 AM PDT	Non-marketing cont
New York	Architect	mzyrokowski@csarchpc.co...	+1 (845) 670-7845	Jennifer Farrell (jennif...	Oct 31, 2024 5:42 AM PDT	Non-marketing cont
--	--	jzylstra@fpschools.org	--	Brandon Faber (brand...	May 1, 2024 8:00 AM PDT	Non-marketing cont
IN	K-12 Schools	dzylstra@wscs.k12.in.us	--	Brandon Faber (brand...	May 1, 2024 8:00 AM PDT	Non-marketing cont
WI	--	joe_zydowsky@msd.k12.wi...	(715) 232-1642	Brandon Faber (brand...	May 1, 2024 8:01 AM PDT	Non-marketing cont
NJ	--	superintendent@nbtsschool...	(732) 289-3000	Brandon Faber (brand...	May 1, 2024 8:00 AM PDT	Non-marketing cont
NJ	--	bzychowski@nbtsschools.org	732-289-3000	Brandon Faber (brand...	May 1, 2024 8:00 AM PDT	Non-marketing cont

How to set up a contact

The screenshot displays the HubSpot CRM interface. On the left, a list of contacts is shown with columns for Name, State/Region, Job Description, Email, Phone Number, and Contact Owner. On the right, a 'Create contact' modal is open, showing a form with fields for Email, First name, Last name, Contact owner, Job title, Job Description, Phone number, State/Region, Lifecycle stage, and Lead status. The modal also includes a 'Create' button, a 'Create and add another' button, and a 'Cancel' button.

Contacts List:

NAME	STATE/REGION	JOB DESCRIPTION	EMAIL	PHONE NUMBER	CONTACT OWNER
Lucia Procurement	--	--	lucia.pancini@silverlightar...	--	Luis Ramo
Robert Zywicki	NJ	--	robert.zywicki@motsd.org	(973) 691-4000	Brandon F
Matthew Zyrokowski	New York	Architect	mzyrokowski@csarchpc.co...	+1 (845) 670-7845	Jennifer F
Joel Zylstra	--	--	jzylstra@fpschools.org	--	Brandon F
Dan Zylstra	IN	K-12 Schools	dzylstra@wcsc.k12.in.us	--	Brandon F
Joe Zydowsky	WI	--	joe_zydowsky@msd.k12.wi...	(715) 232-1642	Brandon F
Brian Zychowski	NJ	--	superintendent@nbschool...	(732) 289-3000	Brandon F
Brian Zychowski	NJ	--	bzychowski@nbschools.org	732-289-3000	Brandon F
Jeffrey Zwiebel	PA	--	jzwiebel@pottsville.k12.pa...	570-621-2900	Brandon F
Jon Zwemke	--	--	jzwemke@reedsport.k12.or...	541-271-3656	Brandon F
Julie Wahr	TX	--	jwahr@dentonisd.org	--	Brandon F
Peter Zwack	New York	K-12 Schools	pzwack@sgecd.net	+1 (518) 347-3600, ext. 7	Jennifer F
Mark Zuzek	MN	--	mark.zuzek@isd917.org	(651) 423-8214	Brandon F
Brett Zuver	MI	--	bzuver@grantps.net	(231) 834-5621	Brandon F
Diana Zurliene	IL	--	dazurliene@fairfieldcolts.co...	(618) 842-6501	Brandon F
Annette Zupin	IN	--	azupin@njsp.k12.in.us	574-896-2155	Brandon F
Annette Zupin	IN	--	azupin@benton.k12.in.us	765 884-0850	Brandon F

Create contact modal:

- Email *
- First name *
- Last name *
- Contact owner *
- Job title
- Job Description *
- Phone number *
- State/Region *
- Lifecycle stage (Subscriber)
- Lead status *

Buttons: Create, Create and add another, Cancel

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

The screenshot displays a CRM interface for a contact named Matt Wright, Superintendent at Marked Tree School District. The 'Activities' tab is selected and highlighted with a red circle. Below the tab, a navigation bar contains buttons for Activity, Notes, Emails, Calls, Tasks, and Meetings, all of which are circled in red. The 'Activity' button is underlined. A search bar for activities and a 'Collapse all' button are also visible. The main activity list shows a 'Logged call - Busy' by Marie Porritt on Jan 14, 2025, which is highlighted with a red box and pointed to by a callout box containing the text 'Great example of a logged call!'. Other activities include a 'Lifecycle change' and a note about the contact's creation from an import file. The right sidebar shows various sections like 'Companies (1)', 'Deals (0)', 'Tickets (0)', 'Payment Links (0)', 'Contacts (0)', 'Subscriptions (0)', and 'Payments (0)'. The left sidebar shows contact details such as email, phone number, and contact owner.

How to create notes under a contact

The screenshot displays a CRM interface for a contact named Matt Wright. The interface is divided into several sections:

- Contact Profile:** Located on the left, it shows the contact's name, title (Superintendent at Marked Tree School District), email address, and various action icons (Note, Email, Call, Task, Meeting, More).
- Activities Tab:** The main area is set to the 'Activities' tab, with a sub-tab for 'Notes' circled in red. A 'Create Note' button is also circled in red.
- Associated Companies:** A list of companies associated with the contact, including Marked Tree School District.
- Deals, Tickets, and Payment Links:** Lists of deals, tickets, and payment links associated with the contact.

A modal window titled 'Note' is open in the foreground, showing the process of creating a note:

- For:** Matt Wright and 1 record
- Text:** Matt said
- Rich Text Editor:** Includes bold, italic, underline, link, and other formatting options.
- Associated with 2 records**
- Task Option:** A checkbox to create a 'To-do' task to follow up in 3 business days (Friday).
- Buttons:** 'Create note' (orange) and 'Draft saved' (green).

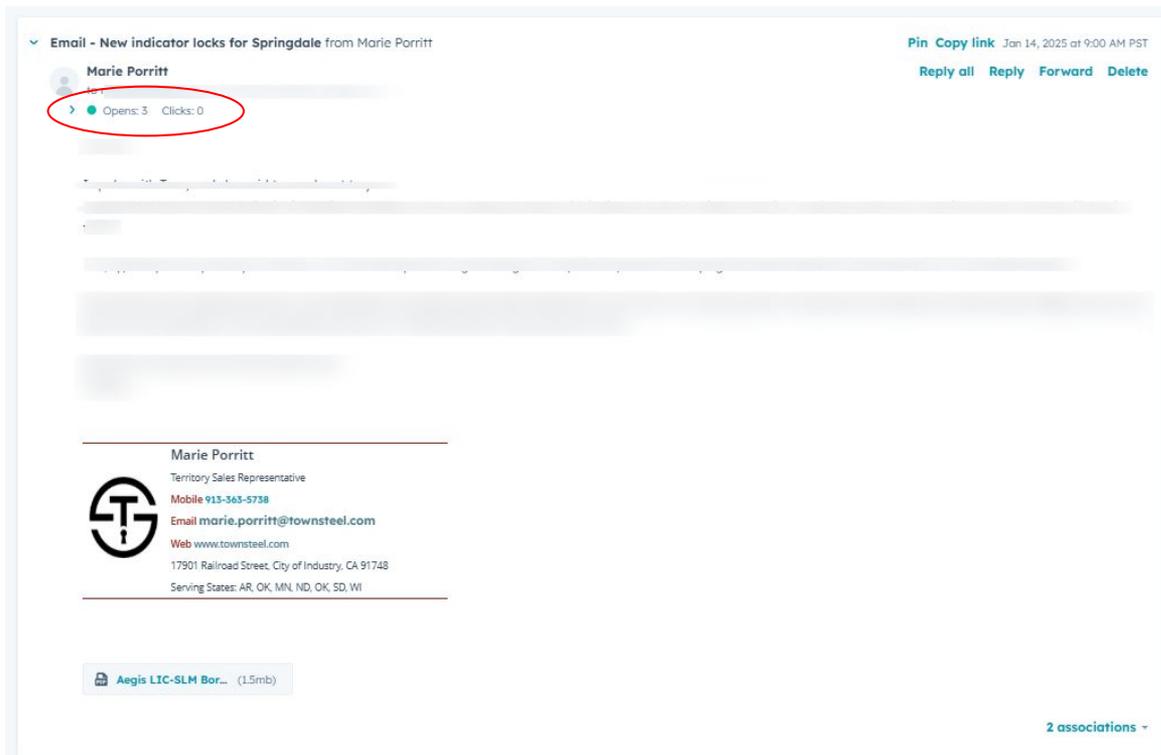
How to create emails under a contact

The screenshot displays the HubSpot CRM interface for a contact named Matt Wright. On the left, the contact's profile is visible, including his name, title (Superintendent at Marked Tree School District), email address (wrightm@mtree.k12.ar.us), and phone number. The main area shows the 'Activities' tab, with a search bar and a navigation menu. The 'Emails' tab is highlighted with a red circle. Below the navigation menu, there are two buttons: 'Log Email' and 'Create Email', both of which are circled in red. A modal window titled 'Email' is open in the foreground, showing the email composition interface. The 'To' field is filled with 'Matt Wright', and the 'From' field is 'Katie Ma (katie.ma@townsteel.com)'. The subject is 'New Security Solution for You'. The body of the email starts with 'Hi Matt,' followed by a dotted line. At the bottom of the modal, there is a 'Send' button and a checkbox for 'Create a To-do - task to follow up. In 3 business days (Friday)'. The background shows various other sections of the CRM, such as 'Companies (1)' and 'Deals (0)', but they are partially obscured by the modal window.

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

Contacts Actions

Matt Wright
Superintendent at Marked Tree School District
wrightm@mtree.k12.ar.us

Note Email Call Task Meeting More

About this contact Actions

Email
wrightm@mtree.k12.ar.us

Phone number
(870) 358-2913

Contact owner
Brandon Faber

Last contacted
01/14/2025 12:15 PM PST

Lifecycle stage
Subscriber

Lead status

Persona

Job Description

Mobile phone number

Account ID

Date entered "Customer (Lifecycle Stage Pipeline)"

Date entered "Qualified Lead (Lifecycle Stage Pipeline)"

Overview Activities Customize record

Search activities Collapse all

Activity Notes Emails **Calls** Tasks Meetings

January 2025

Logged call - Busy by Marie Parritt with Matt Wright
spoke with the Superintendent's office. Matt was not in today and she said to try back tomorrow. I confirmed with her that Matt Wright the superintendent is the correct person I need to talk to concerning locks.

Actions - Jan 14, 2025 at 12:15 PM PST

Contacted	Outcome	Type	Direction	Date	Time
Matt Wright	Busy	Select call type	Outbound	01/14/2025	12:15 PM

Add comment

Log Call Make a phone call

Log Call

Contacted Call outcome Type Direction

Matt Wright - Select an outcome - Select call type - Select call direction -

Date Time

01/14/2025 2:23 PM

Spoke with

Associated with 2 records -

Create a To-do - task to follow up In 3 business days (Friday)

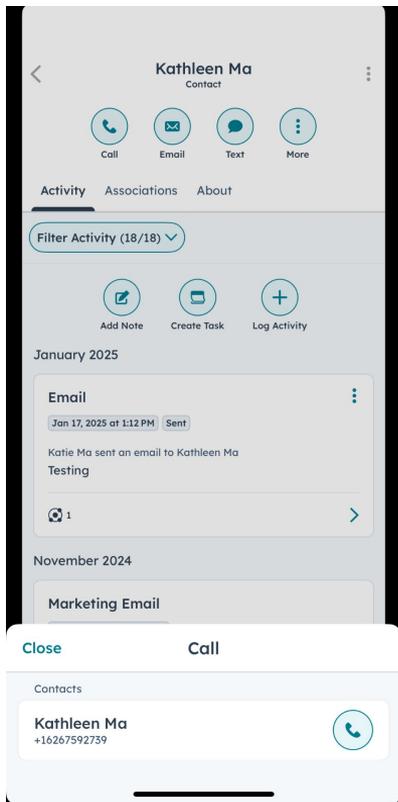
Log call Draft saved

Payments (0)

Track payments associated with this record. A payment is created

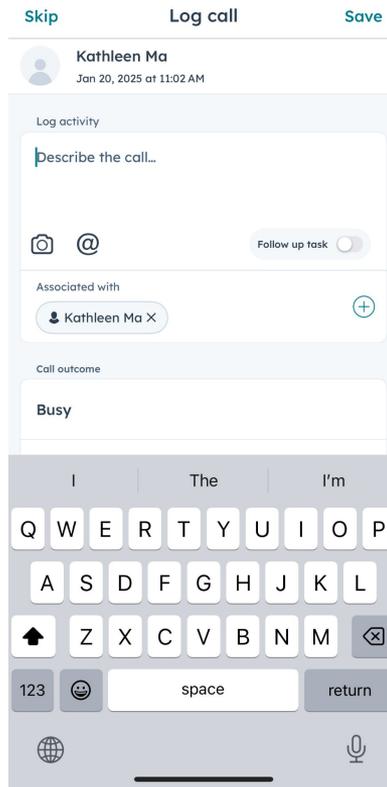
Making a direct phone call from the contacts page is only available on the HubSpot mobile version. Please use the "Log Call" feature to document notes from the call.

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

The screenshot displays a CRM interface for a contact named Matt Wright. The contact's profile is visible on the left, including their email (wrightm@mtree.k12.orus), phone number ((870) 358-2913), and contact owner (Brandon Faber). The main view shows the 'Activities' tab, with a sub-tab for 'Tasks' circled in red. A 'Create Task' button is also circled in red. A modal window titled 'Task' is open, showing a task titled 'Follow up with Matt on 1/17'. The task details include an activity date of 'In 3 business days (Friday)' at '8:00 AM'. A reminder dropdown menu is open, showing options: 'No reminder', 'At task due time', '30 minutes before', '1 hour before', and '1 day before'. The task is associated with 2 records.

Contact Information:

- Name: Matt Wright
- Role: Superintendent at Marked Tree School District
- Email: wrightm@mtree.k12.orus
- Phone number: (870) 358-2913
- Contact owner: Brandon Faber
- Last contacted: 01/14/2025 12:15 PM PST
- Lifecycle stage: Subscriber
- Lead status: [Blank]
- Persona: [Blank]
- Job Description: [Blank]
- Mobile phone number: [Blank]
- Account ID: [Blank]

Task Creation Details:

- Task Title: Follow up with Matt on 1/17
- Activity date: In 3 business days (Friday)
- Time: 8:00 AM
- Reminder: No reminder
- Set to repeat: [Unchecked]
- Task priority: None
- Queue: None
- Activity owner: Katie Ma
- Notes: [Blank]
- Associated with: 2 records

How to create tasks under a contact

The screenshot displays the HubSpot CRM interface. On the left, a vertical navigation menu is shown with the 'Tasks' option highlighted and circled in red. The main content area shows the 'Tasks' page with a table of tasks. The 'Create task' button in the top right corner is circled in red. A callout box points to this button with the text: "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." Another callout box points to the 'Tasks' option in the navigation menu with the text: "You can also find all of your tasks located here."

STATUS	TITLE	ASSOCIATED CONTACT	ASSOCIATED COMPANY	LAST CONTACTED	LAST ENGAGEMENT	TASK TYPE
	Follow up with CB Series Cut Sheet			--	--	To-do

How to create meetings under a contact

Schedule

Host
 User Meeting rotation **NEW**
Katie Ma <katie.l.ma@gmail.com>

Title

Start date: 01/15/2025 Start time: 8:30 AM
End time: 9:00 AM
Meeting type: Select meeting type - Attendees: 2 attendees -
Location: Select location -
Scheduled reminder email: 1 hour before
+ Add reminder
 Include the attendee description in the reminder email body
Attendee description: Send a description to your attendees...
+ Add internal note

Today Jan 13 - Jan 17, 2025
 Hide weekends UTC -08:00 Pacific Time -

	MON 13	TUE 14	WED 15	THU 16	FRI 17
8:00 AM					
9:00 AM			8:30 AM - 9:00 AM		
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM					
3:00 PM					
4:00 PM					
5:00 PM					
6:00 PM					
7:00 PM					

Save Cancel

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

Task

Enter your task

Activity date **In 3 business days (Monday)** 8:00 AM **No reminder**

Set to repeat

Task ...	Priori...	Queue	Activity a...
To-do	None	None	Katie Ma

Notes...

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.

Schedule

12:45 PM

Meeting type **Select meeting type** Attendees **2 attendees**

Location **Select location**

Scheduled reminder email

1 hour before

+ Add reminder week before

Attendee day before

Send a reminder hour before

minute before associated with 2 records

+ Add internal note

Save Cancel

This is what the reminders look like for meetings.

How to set up reminders

Create a **To-do** task to follow up **In 3 business days (Monday)**

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.

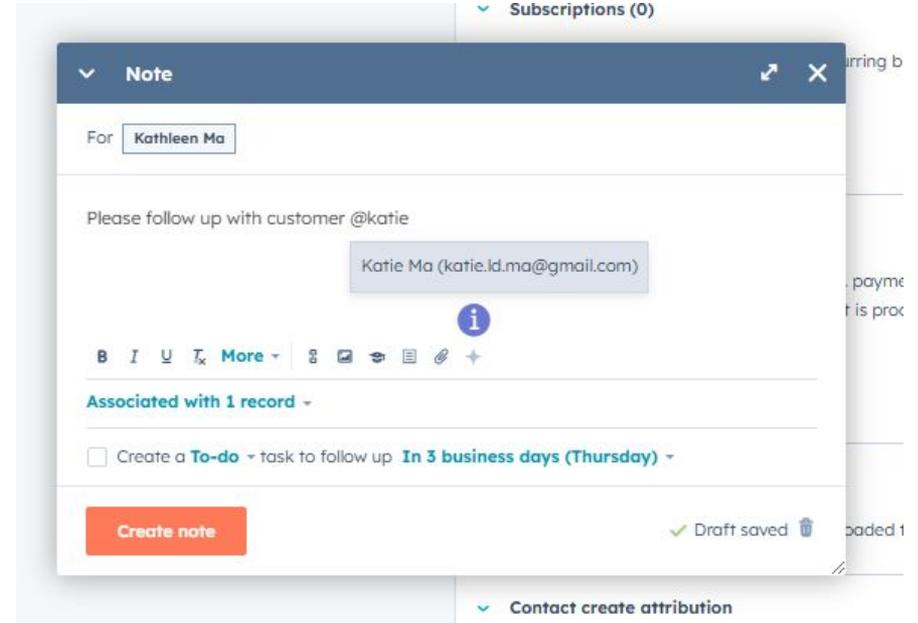
The screenshot shows a task management interface. At the top, there are tabs for 'Activity', 'Notes', 'Emails', 'Calls', 'Tasks', and 'Meetings'. The 'Activity' tab is selected and highlighted with a red box. Below the tabs, there are filter options: 'Filter activity (25/39)', 'All users', and 'All teams'. The main content area shows an 'Upcoming' task: 'Task assigned to Katie Ma' with a due date of 'Jan 16, 2025 at 8:00 AM PST'. Below the task title, there is a sub-task: 'Follow up with Todd Neely'. A red box highlights the reminder settings for this task, which include: 'Due date' set to 'Tomorrow' at '8:00 AM', 'Reminder' set to '1 hour before', and a 'Set to repeat' checkbox which is currently unchecked. Below the reminder settings, there is a table with columns: 'Type', 'Priority', 'Queue', and 'Assigned to'. The row shows: 'To-do', 'None', 'None', and 'Katie Ma'. At the bottom of the task card, there is a note: 'Regarding note logged on Wednesday, January 15, 2025 12:16 PM' and an 'Add comment' button. On the far right, there is a link for '7 associations'.

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 users 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

The screenshot displays the HubSpot CRM interface. At the top, there is a search bar for 'HubSpot' and a user profile for 'TownSteel'. Below this, the 'Companies' section is active, showing '2,709 records'. A search filter 'My companies' is applied. In the top right corner, there are buttons for 'See Target Accounts', 'Data Quality', 'Actions', 'Import', and 'Create company', with the 'Create company' button circled in red. On the left side, a navigation menu is open, with 'Companies' highlighted and circled in red. The main area contains a table with the following columns: STATE/REGION, INDUSTRY SECTOR/JOB DESC., PHONE NUMBER, COMPANY OWNER, CREATE DATE (PST), LAST ACTIVITY DATE (PST), and INDUSTRY. The table lists various companies such as 'Blue Marble Communications', 'Dynia Architects', and 'Weston County Health Services'.

STATE/REGION	INDUSTRY SECTOR/JOB DESC.	PHONE NUMBER	COMPANY OWNER	CREATE DATE (PST)	LAST ACTIVITY DATE (PST)	INDUSTRY
MO	--	(816) 531-0200	Brad Parks (brad.parks...)	Dec 17, 2021 7:33 AM PST	--	Architecture & Planning
IL	--	(847) 440-8294	Brad Parks (brad.parks...)	Dec 17, 2021 7:33 AM PST	--	--
GA	--	(770) 497-1929	Brad Parks (brad.parks...)	Dec 17, 2021 7:33 AM PST	--	--
DE	--	(302) 984-1400	Brad Parks (brad.parks...)	Dec 17, 2021 7:33 AM PST	--	--
CO	--	(303) 824-2745	Brad Parks (brad.parks...)	Dec 17, 2021 7:33 AM PST	--	--
AK	--	(907) 563-5141	Brad Parks (brad.parks...)	Dec 17, 2021 7:33 AM PST	--	--
Zürich	--	--	Jessie Chu (jessie.chu...)	Jun 9, 2021 1:28 PM PDT	Jan 9, 2025 8:03 AM PST	Mechanical or Industrial Eng...
WY	--	+1 844-310-8647	Kevin Dunn (kdunn609...)	Nov 17, 2023 10:37 AM PST	Aug 28, 2024 8:58 AM PDT	Telecommunications
WY	--	--	Brad Parks (brad.parks...)	May 1, 2022 9:19 AM PDT	--	--
WY	--	307-746-3553	Michael Dawson (Deo...)	Oct 18, 2021 3:02 PM PDT	--	Hospital & Health Care
WV	--	+1 (304) 534-5858	Brian Pritchard (bpric...)	Jun 22, 2023 3:01 PM PDT	Oct 16, 2024 10:37 AM PDT	Building Materials
WV	--	+1 (304) 343-4601	Brian Pritchard (bpric...)	Jun 23, 2021 10:11 PM PDT	--	--
WV	--	+1 (304) 343-1332	Brian Pritchard (bpric...)	Jun 23, 2021 8:19 PM PDT	Dec 16, 2024 7:55 AM PST	Retail
WV	--	+1 (304) 375-2553	Brian Pritchard (bpric...)	Jun 23, 2021 6:41 PM PDT	Apr 10, 2024 12:11 PM PDT	Building Materials
Wokingham	--	--	Brandon Faber (brand...)	May 2, 2024 8:48 AM PDT	--	Computer Software
WI	Architect	+1 (715) 835-7500	Marie Porritt (marie.pa...)	Nov 7, 2024 7:41 AM PST	Nov 7, 2024 7:51 AM PST	Construction
WI	Higher Education	+1 (715) 836-4636	Marie Porritt (marie.pa...)	Nov 7, 2024 6:52 AM PST	Nov 7, 2024 12:10 PM PST	Education Management
WI	Mixed-use Properties, Distrib...	+1 (608) 754-1123	Katie Ma (katie.la.ma@...)	Oct 21, 2024 12:23 PM PDT	Oct 21, 2024 12:39 PM PDT	Building Materials
WI	K-12 Schools	+1 (715) 852-3000	Brandon Faber (brand...)	Oct 17, 2024 10:32 AM PDT	Oct 24, 2024 8:00 AM PDT	Primary/Secondary Education
WI	Mixed-use Properties, Comm...	--	Sheldon Kosko (sheldo...)	Oct 14, 2024 3:39 PM PDT	Oct 14, 2024 3:41 PM PDT	Security and Investigations

How to set up a company

Create company

See [Edit this form](#)

Company domain name

Company name *

Company owner

Katie Ma Start by entering a domain name, an account name, or both.

Industry

Industry Sector/Job Description *

Type

City

State/Region *

Postal code

Street address

Phone number

Create Create and add another Cancel

Create company

See [Edit this form](#)

Company domain name

Company name *

Company owner

Katie Ma

Industry

Industry Sector/Job Description *

Type

City

State/Region *

Postal code

Street address

Phone number

Create Create and add another Cancel

Create company

See [Edit this form](#)

Phone number

E-mail

Website URL

LinkedIn company page

Number of employees

Account Number

Annual revenue

Description

Campaign Source

Target Account

Terms

Create Create and add another Cancel

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

The screenshot displays a CRM dashboard for 'Deals' with 2,464 records. The dashboard includes a search bar for 'My deals', a view selector for 'Add view (2/50)', and buttons for 'Actions', 'Import', and 'Create deal'. Summary metrics are shown for WEIGHTED DEAL AMOUNT (\$43.51M), OPEN DEAL AMOUNT (\$40.3M), CLOSED DEAL AMOUNT (\$12.7M), NEW DEAL AMOUNT (\$163.17K), and AVERAGE DEAL AGE (243 days). A table below lists individual deals with columns for DEAL STAGE, CLOSE DATE (PST), LAST ACTIVITY DATE (PST), and other details.

DEAL STAGE	CLOSE DATE (PST)	LAST ACTIVITY DATE (PST)
Quote sent (Contract Hardw...	Mar 16, 2025 8:49 A	Yesterday at 12:22 PM PST
Quote sent (Contract Hardw...	Jan 31, 2025 3:41 P	Yesterday at 3:47 PM PST
Biz Dev (Contract Hardware ...	Apr 13, 2025 8:49 A	--
Closed won (Contract Hardw...	Apr 13, 2025 8:37 A	Yesterday at 8:45 AM PST
Quote sent (Contract Hardw...	Apr 13, 2025 8:20 A	Yesterday at 8:24 AM PST
Quote sent (Contract Hardw...	Mar 31, 2025 2:01 P	--
Quote sent (Contract Hardw...	Feb 9, 2025 9:53 AM PST	Jan 13, 2025 9:55 AM PST
Quote sent (Contract Hardw...	Apr 10, 2025 9:39 AM PDT	Yesterday at 4:18 PM PST

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

The screenshot shows a CRM interface for managing deals. At the top, there are buttons for 'Actions', 'Import', and 'Create deal'. Below this is a navigation bar with 'All deals' and 'My deals' tabs, and a '+ Add view (2/50)' button. The main content area is divided into a left sidebar, a top filter bar, a summary section, and a main table of deals.

Annotations:

- A red circle highlights the sidebar menu icon.
- A red circle highlights the 'Deal owner' dropdown menu.
- A red circle highlights the filter bar containing 'Deal owner', 'Create date', 'Last activity date', 'Close date', '+ More', and 'Advanced filters'.
- A red circle highlights the deal stage filters: 'COMMITTED' (31), 'CLOSED WON' (530), 'CLOSED LOST' (1,125), and 'SAMPLE SENT' (52).

Summary Section:

OPEN DEAL AMOUNT	CLOSED DEAL AMOUNT	NEW DEAL AMOUNT
\$40.3M	\$12.7M	\$163.17K
Average per deal: \$51.14K	Average per deal: \$24.05K	Average per deal: \$40.79K

Deal Table:

Deal ID	Deal Name	Amount	Close Date	Status
Q011325	Q011325S-KG (Job: Lemuel...)	\$69,875		High
Q111824RW-Rochester	Colonial Manufacturing (Jo...)	\$12,912		High
Q011325S-KG (Job: Lemuel Shattuck (JN1112))		\$69,306		High
Q103124S. Rev.1-RMH (Job: Wordenn Mgt.)		\$14,235	01/07/2025	High
S2024-117-TB-SC (CE-109-S-626 Academy Security...)			07/31/2024	High
Q120224S-ADH (Job: SPWD Security and Fixture...)		\$42,636	01/07/2025	High
S2024-52-KL-EC (HANDS ON SAMPLE)			03/29/2024	High

Callouts:

- Top Callout:** Use these filter to help you sort out deals. Ex: use the "Deal owner" to find deals you've worked on
- Bottom Left Callout:** This view allows you to see the different stages more clearly. Whatever works better for you!
- Bottom Center Callout:** Click on this dropdown to choose which deal channel you want to view

How to look at a deal

Q020524S.Rev. 5-KB (Job: USH/LVHN Behavioral Health Hospital)
Amount: \$130,678.85
Close Date: 12/03/2024
Stage: **Closed won**
Pipeline: **Contract Hardware Channel (CHD)**

Deal Information:
Deal owner: Peter Martindell
Last contacted: 11/26/2024 12:53 PM PST
Deal type: Healthcare
Priority: High
State: PA
Create date: 11/18/2024
Close date: 12/03/2024
Forecast amount: \$130,678.85

Deal Activity:
Task assigned to Elizabeth Cahill (Dec 18, 2024 at 8:00 AM PST)
Deal activity: Elizabeth Cahill moved deal from Quote sent to Closed won. (Dec 3, 2024 at 11:24 AM PST)
Email - RE: Kelley Bros PO 76-27297 (Dec 3, 2024 at 7:39 AM PST)
Email - TownSteel Visit from Diane Humphreys to Mike Cipolloni (Nov 26, 2024 at 12:53 PM PST)

Associated Entities:
Contacts (1): John Cuocco (Project Manager at Kelley Bros. - Center Valley (Kelley-PA))
Companies (1): Kelley Bros. - Center Valley (Kelley-PA)

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

How to look at a deal

The screenshot shows a HubSpot deal record for "\$130,678.85 Q020524S.Rev. 5-KB (Job: USH/LVHN Behavioral Health Hospital)". The page is divided into several sections:

- Left Sidebar:** Contains deal metadata such as "Last activity date", "Last modified date", "Number of sales activities", "Next activity date", "Pipeline", "Contract Hardware Channel (CHD)", "Original Traffic Source", "Offline sources", "Record ID", "Deal name", "Deal probability", "HubSpot team", "Arch Resources", and "Number of associated contacts".
- Main Content Area:** Features tabs for "Overview" and "Activities". The "Activities" tab is active, showing a list of activities with filters for "Activity", "Notes", "Emails", "Calls", "Tasks", and "Meetings". A search bar and a "Collapse all" button are also present. The activity list includes a task assigned to Elizabeth Cahill and an email from Kelley Bros PO 76-27297.
- Right Sidebar:** Contains sections for "Subscriptions (0)", "Payments (0)", "Attachments (0)", and "Deal create attribution". The "Attachments" section is highlighted with a red circle and contains three PDF files: "Kelley-Bros-TOWNSTEE-PO-76-27297.pdf", "Aegis LTC-SLM 11.21.24.pdf", and "Q020524S.Rev.5-KB,UHS-LVHN BEHAVIORAL HEALTH ...".

Annotations on the page include:

- A red box around the "TS BizDev Rep" dropdown menu, which is currently set to "Brandon Faber".
- A red box around the "Rep Agency" and "Arch Resources" fields.
- A grey box with the text "This is where you find attachments and quotes" pointing to the "Attachments" section in the right sidebar.
- A grey box with the text "TS BizDev Rep is very important to you!! This is where you get your credit where credit is due" pointing to the "TS BizDev Rep" dropdown menu.

How to find deals within a vertical deal-type

The screenshot shows the HubSpot Deals interface. At the top, there's a search bar and a navigation menu. Below that, the 'Deals' section shows 2,473 records. A search filter 'My deals' is applied. The 'Advanced filters' button is circled in red. To the right, the 'All Filters' panel is open, showing an 'Add filter' input field with 'deal ty' entered and a 'Deal type' filter selected. Three callout boxes provide instructions: 'Click here to filter.' points to the 'Advanced filters' button; 'Type in "Deal type" here.' points to the 'Add filter' input field; and 'Click on "Deal type"' points to the 'Deal type' filter selection.

Deals 2,473 records

All deals My deals + Add view (2/50) All Views

Contract Hardware Chan... Deal owner - Create date - Last activity date - Close date - + More - Advanced filters

WEIGHTED DEAL AMOUNT \$43.68M Average per deal: \$17.86K

OPEN DEAL AMOUNT \$40.55M Average per deal: \$50.94K

CLOSED DEAL AMOUNT \$12.71M Average per deal: \$24.03K

NEW DEAL AMOUNT \$35.00M Average per deal: \$35.00K

DEAL NAME	OWNER	AMOUNT	STATUS	ACTIVITY	DEAL TYPE
ct Hardw...	ter Martindell (peter...	\$8,766.73	Open		
hardware ...	ff Golden (cliff.golde...	\$50,000	Open		
ct Hardw...	enny Moore (kenny.m...	\$4,379.10	Open		
ct Hardw...	Kenny Moore (kenny.m...	\$23,115.98	Open	Yesterday at 2:47 PM PST	K-12
ct Hardw...	Diane Humphreys (dian...	\$15,256	Open	Yesterday at 8:23 AM PST	Wholesale
ct Hardw...	Kenny Moore (kenny.m...	\$29,669	Open	Yesterday at 8:15 AM PST	Multi-family
ct Hardw...	Patrick Manning (pman...	\$10,000	Open		
ct Hardw...	Kenny Moore (kenny.m...	\$9,404.10	Open		
ct Hardw...	Kenny Moore (kenny.m...	\$49,855.04	Open		
ct Hardw...	Kyle Learch (kyle@dug...	\$14,025.48	Open		
hardware ...	David Furcayg (david@...	\$69,875.03	Open		
Q0113255-KG (Job: Lemuel...	Closed won (Contract Hardw...	\$69,306.30	Closed	Jan 14, 2025 8:45 AM PST	Healthcare
Q0113255-1S1 (Job: New P...	Quote sent (Contract Hardw...	\$13,991	Open	Jan 14, 2025 8:24 AM PST	New Busine
Q100224V-Kelley Bros-Rev...	Quote sent (Contract Hardw...	\$16,089.88	Open	--	Healthcare
T011025-SEC (Job: Jose He...	Quote sent (Contract Hardw...	\$20,509.80	Open	Jan 13, 2025 9:55 AM PST	New Busine

Advanced Filters

This view doesn't have any advanced filters. Select a filter to begin.

Add filter

deal ty

Deal information

Deal type

Click here to filter.

Type in "Deal type" here.

Click on "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).

How to find deals within a vertical deal-type

The screenshot shows the HubSpot Deals dashboard. At the top, there's a search bar for HubSpot and a 'My deals' filter. Below that, there are summary statistics for deals, including total, weighted, open, and closed deal amounts. A table of deals follows, with columns for deal name, stage, close date, owner, amount, last activity date, and deal type. On the right, the 'All Filters' panel is open, showing an 'Advanced Filters' section with a group 'Group 1' containing the filter 'Deal type is any of Multi-family'. An 'Edit filter' dialog is also open, showing a dropdown menu for 'Deal type' with 'Multi-family' selected. A red box highlights this dialog, and an arrow points from it to a text box at the bottom right.

Deals
14 records

All deals + Add view (2/50) All Views

Contract Hardware Chain... Deal owner Create date Last activity date Close date + More Advanced filters

TOTAL DEAL AMOUNT
\$537.73K
Average per deal: \$38.41K

WEIGHTED DEAL AMOUNT
\$325.23K
Average per deal: \$23.23K

OPEN DEAL AMOUNT
\$537.73K
Average per deal: \$38.41K

CLOSED DEAL AMOUNT
\$0

NEW DEAL AMOUNT
\$7...
Average per deal: \$...

DEAL NAME	DEAL STAGE	CLOSE DATE (PST)	DEAL OWNER	AMOUNT	LAST ACTIVITY DATE (PST)	DEAL TYPE
Q0112525RC-Commercial O...	Quote sent (Contract Hardw...	Apr 15, 2025 8:13 AM PDT	Kenny Moore (kenny.m...	\$29,669	Yesterday at 8:15 AM PST	Multi-family
Q0112525RC-Design Supply ...	Quote sent (Contract Hardw...	Apr 13, 2025 10:14 AM PDT	Kenny Moore (kenny.m...	\$49,855.04	Jan 15, 2025 10:18 AM PST	Multi-family
Q082224V-Hanover Specia...	Quote sent (Contract Hardw...	Jun 30, 2025 9:55 AM PDT	Paul Frazier (paulfrazie...	\$32,351.20	Jan 7, 2025 10:06 AM PST	Multi-family
Q122424V-Middlesex (Job: ...	Quote sent (Contract Hardw...	Mar 23, 2025 2:25 PM PDT	Peter Sedgwick (pmse...	\$21,414.25	Jan 15, 2025 11:51 AM PST	Multi-family
Q121024V-Middlesex (Job: ...	Quote sent (Contract Hardw...	Mar 9, 2025 1:20 PM PDT	Peter Sedgwick (pmse...	\$13,890.50	Jan 13, 2025 3:19 PM PST	Multi-family
Q112224S-COM (Job: Ridge...	Quote sent (Contract Hardw...	Feb 22, 2025 3:38 PM PST	Paul Frazier (paulfrazie...	\$26,654		
Q112224V-Eastway Lock & ...	Quote sent (Contract Hardw...	Feb 22, 2025 11:08 AM PST	Tom Stapleton (tstaplet...	\$12,020		
Q032024J-Eaton-Rev 3 (Jo...	Quote sent (Contract Hardw...	May 31, 2025 4:06 PM PDT	Todd Neely (todd.neely...	\$72,552		
Q111824RW-Rochester Col...	Committed (Contract Hardw...	Dec 31, 2024 2:39 PM PST	Kyle Learch (kyle@dig...	\$12,911		
Q110624E-OSP (Job: Wyan...	Quote sent (Contract Hardw...	Feb 3, 2025 1:19 PM PST	Kenny Moore (kenny.m...	\$3,3		
Q102324V-KB (Job: Replac...	Quote sent (Contract Hardw...	Jan 24, 2025 10:49 AM PST	Kyle Learch (kyle@dig...	\$6,06		
Q102124V-Comdor LLC (Jo...	Quote sent (Contract Hardw...	Jan 20, 2025 9:59 AM PST	Paul Frazier (paulfrazie...	\$75,130		
Q100224V-Kelley Bros (Job...	Closed do to Revision (Contr...	Jan 2, 2025 2:47 PM PST	Michael O'Connor (moc...	\$16,089		
Q092724V-Architectural Ha...	Committed (Contract Hardw...	Dec 26, 2024 11:57 AM PST	Paul Frazier (paulfrazie...	\$171,415.18	Jan 2, 2025 7:45 AM PST	Multi-family

All Filters

Advanced Filters Discard

Group 1

Deal type is any of Multi-family

AND + Add filter

OR + Add filter group

Edit filter

Deal type is any of

Multi-family x

Search

New Business

Existing Business

K-12

Healthcare

Multi-family

Multi-family - TO LIFE

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

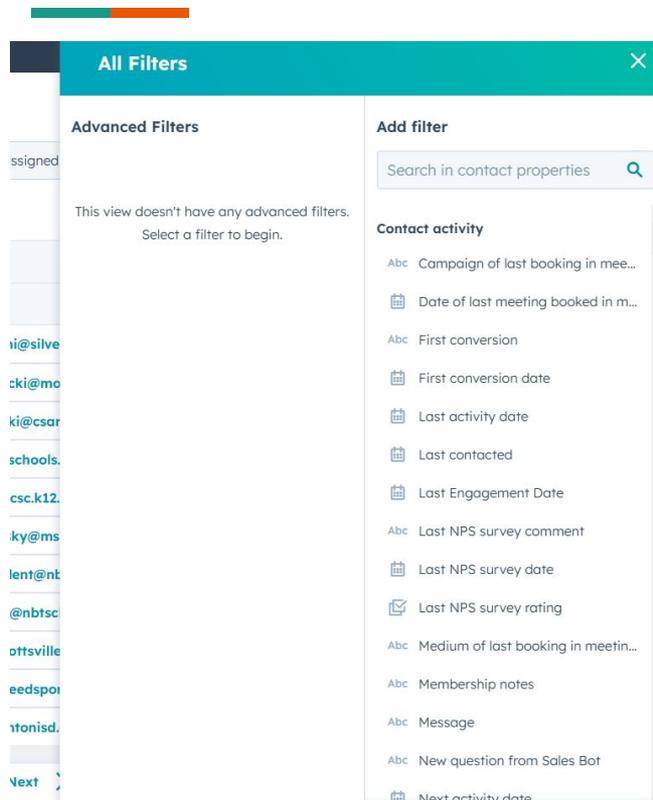
How to use filtering

The image shows four examples of filter bars from a CRM system. Each bar contains several filter options with dropdown arrows, a '+ More' link, and an 'Advanced filters' link with a hamburger menu icon.

- Deals:** Deal owner, Create date, Last activity date, Close date, + More, Advanced filters
- Contacts:** Contact owner, Create date, Last activity date, Lead status, + More, Advanced filters
- Companies:** Company owner, Create date, Last activity date, Lead status, + More, Advanced filters
- Lists:** All lists (with a close 'X' icon), Unused lists, Recently deleted, All creators, All types, All objects, Advanced filters (0)

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



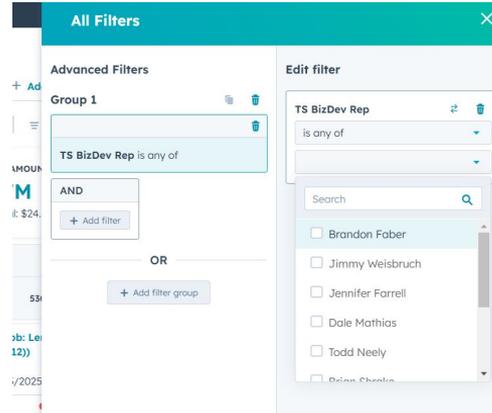
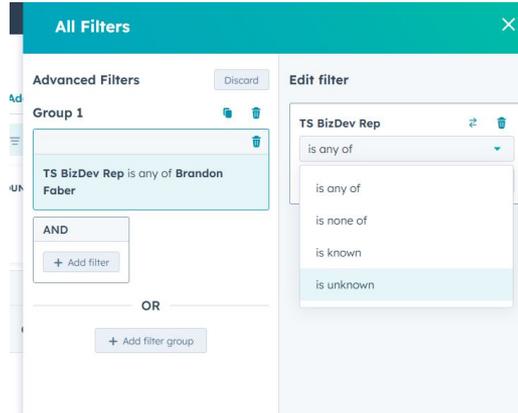
As briefly mentioned before, this is what the “Advanced Filters” button looks like:

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.

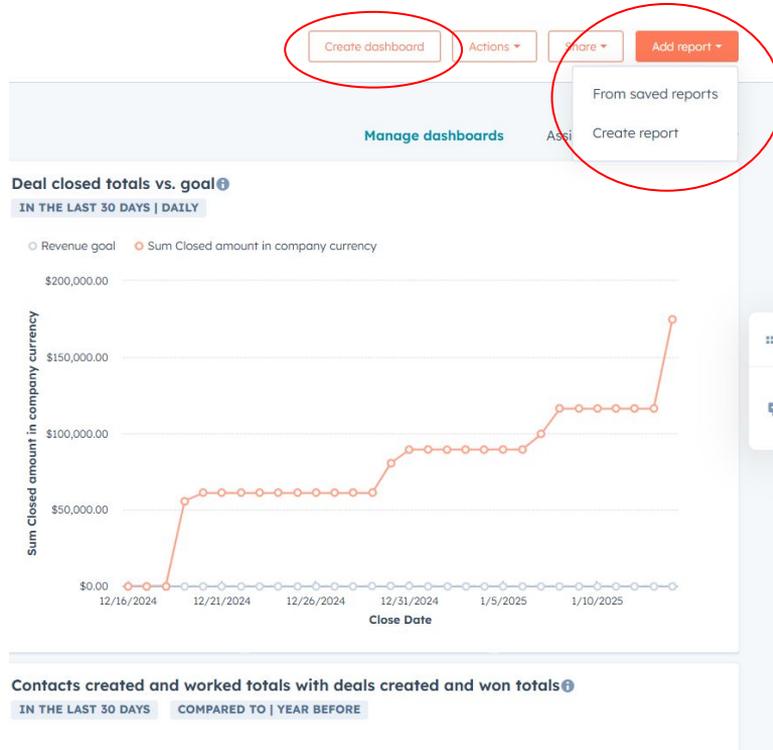
How to operate sales report dashboards

The image shows a sales report dashboard interface. At the top left, a 'Sales' dropdown menu is circled in red. A callout box points to it with the text: 'Click this dropdown to view the different types of dashboards'. Below this, a 'Reporting' menu is also circled in red, with a callout box stating: 'As you scroll down, there will be many different types of reports that were previously put together'. The dashboard itself features several components: a 'Deal revenue forecast by stages' section showing '\$1,613,495' for 'IN THE LAST 30 DAYS'; a 'Closed amount in company currency' line chart comparing 'Revenue goal' and 'Sum Closed amount in company currency' from 12/16/2024 to 1/10/2025; and a 'Team activities by activity date' section at the bottom. The interface includes navigation icons on the left, filter options ('Quick filters', 'Advanced filters'), and action buttons ('Create dashboard', 'Actions', 'Share', 'Add report') at the top right.

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.

The image shows a screenshot of the HubSpot Reports interface. On the left, a dark navigation sidebar contains several icons. The 'Reports' icon, which is a bar chart, is circled in red. A dropdown menu is open from this icon, listing various reporting options: Reporting, Dashboards, Reports, Sales Analytics (circled in red), Service Analytics, Forecast, and Goals. The main content area is titled 'Reports' and features a search bar and a list of reports under the heading 'My reports'. The 'Analytics suites' section includes 'Contacts', 'Traffic', 'Sales', and 'Activities & leads'. At the bottom of this list, 'Team activity timeline' is highlighted with a light blue background and circled in red. On the right side of the interface, a secondary 'Reports' panel is visible, listing various analytics suites such as 'Contacts', 'Traffic', 'Sales', 'Activities & leads', 'Call outcomes', 'Chats', 'Completed activities', 'Lead funnel', 'Lead response time', 'Meeting outcomes', 'Prospecting activities', 'Tasks completed', 'Team activity timeline' (circled in red), 'Deals', 'Forecast & revenue', and 'Service'.

How to see all of your activities in one place

Reports Create report

Search reports

My reports

Analytics suites

- Contacts
- Traffic
- Sales
- Activities & leads
- Call outcomes
- Chats
- Completed activities
- Lead funnel
- Lead response time
- Meeting outcomes
- Prospecting activities
- Tasks completed
- Team activity timeline**
- Deals
- Forecast & revenue
- Service

Team activity timeline

Summary

NUMBER OF ACTIVITIES **424** ▲ 18.11%

LAST QUARTER FILTERS (2)

- Brandon Faber** logged an email to **Jeremy Keenan** 12/30/2024
Meeting to Discuss Your New Build and Renovations
Hi Jeremy, I wanted to see if you'd be available for a quick meeting to discuss school security and classroom door hardware solutions for your upcoming new build and renovations. As a former School Resource Officer, I understand the importance of creating secure learning environments and would love to share some options that...
- Brandon Faber** logged an email to **Joel Lofton** 12/30/2024
RE: ALERRT Conference Follow Up
Hi Joel! Hope you are having a great holiday season! I just wanted to follow up with you and see how your concerns come up that I can address? [A black background with a black square Description automatic...]
- Brandon Faber** logged an email to **Chris Hession** 12/30/2024
Meeting to Discuss Security for Your New Build and Renovations
Hi Chris, I wanted to see if you'd be available for a meeting to discuss school security and classroom door hardware solutions for your upcoming new build and renovations. As a former School Resource Officer, I understand the importance of creating secure learning environments and would love to share some options that...

Filters About this report

- Date range**
Last quarter
- Activity assigned to**
Brandon Faber X
- HubSpot Team**
Any
- Activity type**
Task Call Meeting Note
Email reply from contact + 2 more

Engagement filters
[+ Add filter](#)

Annotations:

- Once you are done, click "Save report"
- Choose your desired date range.
- Type in the name.
- Choose which activities you want to view.

How to see all of your activities in one place

Save report ✕

This report will be saved to your reports. You can also add it to a dashboard.

Report name *

Brandon's Activity Timeline

Description

View a list of the most recent activity logged by your team. See specific tasks, emails, meetings, and calls logged.

884

+ Generate

Add this report to a dashboard?

- Don't add to a dashboard
- Add to existing dashboard
- Add to new dashboard

Your choice

Next

Save report ✕

Who can access this report?

- Private to owner (me)
- Everyone
- View and edit
- View only

Choose your desired accessibility

< Back

Save

Brandon's Activity Timeline was saved. [Go to your reports.](#) ✕

Activity timeline

Save report

Count of activities

424

▲ 18.11%

FILTERS (2)

don Faber logged an email to Jeremy Keenan /2024

ing to Discuss Your New Build and Renovations

remy, I want... coming new b... some options t...

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

Reports Create report

Search reports

My reports

All reports 318 Custom reports 189 Favorites 0

Dashboard: Any Owner: Anyone Last updated: MM/DD/YYYY to MM/DD/YYYY

<input type="checkbox"/>	NAME	DASHBOARDS	OWNED BY	ASSIGNED	LAST VIEWED	LAST UPDATED
<input type="checkbox"/>	<input type="checkbox"/> ☆ Brandon's Activity Timeline	0	Katie Ma	Owner only	--	Jan 16, 2025 3:44 PM Katie Ma
<input type="checkbox"/>	<input type="checkbox"/> ☆ All Open RMA Ticket Status (ALL TIME) - Prices Uns...	1	Katie Ma	--	Jan 15, 2025 9:56 AM Katie Ma	Jan 13, 2025 10:35 AM Katie Ma
<input type="checkbox"/>	<input type="checkbox"/> ☆ All Open RMA Ticket Status (ALL TIME) - Prices	1	Katie Ma	--	Jan 15, 2025 9:56 AM Katie Ma	Jan 13, 2025 10:31 AM Katie Ma
<input type="checkbox"/>	<input type="checkbox"/> ☆ Activity Report	1	User removed	--	Jan 16, 2025 1:22 PM Brandon Faber	Oct 21, 2024 6:16 PM Jennifer Farrell
<input type="checkbox"/>	HubSpot Users (Core Seat)	0	Katie Ma	Everyone	Oct 8, 2024 8:30 AM Katie Ma	Oct 7, 2024 1:16 PM Katie Ma
<input type="checkbox"/>		0	Todd Neely	Owner only	Sep 12, 2024 9:33 AM Katie Ma	Sep 4, 2024 12:43 PM Todd Neely

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

How to create lists

The screenshot shows the Microsoft Dynamics 365 interface for managing lists. The left-hand navigation pane is open, with 'Lists' selected. The top right of the page features buttons for 'Admin settings', 'Import', and 'Create list'. A table of existing lists is displayed below, with columns for List Name, List Size, Type, Object, Last Updated, Creator, Folder, and Used In.

	LIST SIZE	TYPE	OBJECT	LAST UPDATED (PST)	CREATOR	FOLDER	USED IN
Contacts	207	Static	Contact	Nov 25, 2024 10:45 AM by Katie Ma	Katie Ma	-	0
Pool Contacts	30	Static	Contact	Nov 6, 2024 9:55 AM by Katie Ma	Katie Ma	-	
Contacts	76	Active	Contact	Oct 31, 2024 4:46 PM by Katie Ma	Katie Ma		
Brandon's WI Contacts	511	Active	Contact	Oct 31, 2024 4:45 PM by Katie Ma	Katie Ma		
Brandon's WV Contacts	100	Active	Contact	Oct 31, 2024 4:44 PM by Katie Ma	Katie Ma		
Brandon's WA Contacts	571	Active	Contact	Oct 31, 2024 4:44 PM by Katie Ma	Katie Ma		

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

◀ Back to lists

Create a list

- Contact-based**
Create a list of Contact records
- Cart-based**
Create a list of Cart records
- Company-based**
Create a list of Company records
- Deal-based**
Create a list of Deal records
- Order-based**
Create a list of Order records
- Ticket-based**
Create a list of Ticket records

List name *

Please name this list before saving it

Description

* List Assistant BETA PAI
Describe the types of records you'd like to see on this list, and the List Assistant will open in a side panel on the next screen with suggested filters.

Example prompt: Contacts who opened an email in the last 30 days

What kind of list are you creating?

- Active list 74 of 1,300 used
Active lists automatically update over time. Records will join or leave the list as their properties change.
- Static list 18 of 1,300 used
Static lists do not automatically update as your records change. A static list represents a single moment in time.

Custom properties [Customize the 'Create list' form](#) ?
There are no custom properties selected.

Contact-based and company-based are the most common

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.