

# HubSpot CRM user guide

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# Section 1 - Outlook set up

### **Email integration**

- 1. Log into HubSpot CRM <u>https://www.hubspot.com/</u> with your HubSpot login and password.
- 2. Click the dropdown arrow in the top left corner of the HubSpot toolbar and choose **Sales**, then click **Settings**.

3 Contacts	×									θ	-	٥
← → C 🔒 Se	cure   https://a	pp.hubspot.com	/contacts/2828623/co	ontacts/list/view/al	/?						4	· 🙈 🕕
👖 Apps 👔 World	Golf Tour 🏾 🏷 H	ow to Set Up Lifecy	🏃 How to filter your	r cor 🧧 New folder								Other bookn
<mark>&gt;</mark> Marketing 👻	Dashboard	Contacts -	Lead Capture –	Settings					\$	((•,•]•	<b>()</b> -	face2faceHF Hub ID: 282
Marketing												
Sales	ts				$\mathbf{N}$	Search for a contact	Q	Customize -	Import	t	Add	contact

3. From the **Settings** panel click the dropdown arrow next to **Integrations** and choose **Email integrations**.



4. Click **Connect an inbox**.

Sales -	Dashboard Contacts	Companie	s Deals	Tasks	Sales Tools = Settings	Search	🗢 🐶 🍥
	Account Defaults		Email In	itegrat	ions		
	Contacts & Companies	a 9	Connect	ed Emails	HubSpot Extensions		
	Integrations	~	Use vour con	nected inb	oxes to send email with you	HubSpot tools and update all your contact	
	Email Integrations		records effor	tlessly.			Connect an inbox
	Browse all integrations						

5. Click **Office 365**.

Email Integrations	CHOOSE EMAIL SYSTEM	CONNECT INBOX		INSTALL HUBSPOT SALES	Step 1 of 3
		Connect your email service	provider		
		Choose the service you use to send your er	mails below.		
		1 0	Other		
	Gm	il Office 365	(IMAP)		

## 6. Click **Connect inbox**.



7. Read of the security information in the popup box and click **Accept and connect to Outlook 365**.

N	/e get it. So we want to be perfectly clear about how this'll work.
Fi	irst, by granting HubSpot access to your inbox, your HubSpot CRM will be
a	ble to locate relevant email conversations and $\log$ them in your CRM $\operatorname{so}\operatorname{you}$
a	nd your team can work on them together. Emails that you send from HubSpo
С	RM will also appear in your Outlook sent folder, so there'll be no confusion
a	bout which emails live where.
Т	his means that your HubSpot CRM will have access to some information
a	bout your emails, like the email address you're sending them from, the email
a	ddresses of your recipients, what's in the subject line, and what's in the body
0	f the email. We'll only use that access to power your HubSpot CRM Outlook
in	tegration and make life easier for you, never for any nefarious purposes of

8. From your Office 365 account, login with your Office 365 account details (email address and password) and **not** your HubSpot account login.

Microsoft	Microsoft
Sign in	
your.name@face2faceHR.com	Enter password
Next	Password
No account? Create one!	Sign in
Can't access your account?	Keep me signed in
	Forgotten my password
	Sign in with a different Microsoft account

9. The following two screens will show the account being connected.

Connecting your account now. This will only take a moment.	Huzzah! Your connection is now complete. Redirecting you now.
• • •	

10. In order to link HubSpot to Outlook, click **Get the Outlook add-in**.



11. Click **Get it now** in the left sidebar.



12. If prompted, sign in using your **Office 365** details (box 1) or click **Continue** (box 2).



13. Click **Add** (box 1). Once the installation is complete, you will be redirected to a page which indicates the add-in has been successfully installed (box 2).



14. Restart **Outlook**. If the installation has been successful, your Outlook screen will now have the HubSpot logo in the top right corner.

8 S	•		Sent - sarah.sh	ort@face	e2facehr.com - Outl	ook				
File	Home Send / Receive Fo	lder View Help 🖓 Tell m	e what you want to do							/
New New Email Items *	Clean Up - Delete Archive	Reply Reply Forward The More -	<ul> <li>Marketing - sara  G To Manager</li> <li>□ Team Email</li> <li>□ Reply &amp; Delete</li> <li>⑦ Create New</li> </ul>	▲ ✓ Mc	ve Rules OneNote	Unread/ Follow Read Up *	Search People Address Book	Send/Receive All Folders	HubSpot Sales *	
New	Delete	Respond	Quick Steps	G.	Move	Tags	Find	Send/Receive	HubSpot 🗟	
Drag Your Fav	orite Folders Here	Sent				All ▼ Search	Sent			

15. Alternatively, the following box may appear, click **Download now**.



- If neither of these options work, click on the following link which will take you through an alternative installation process <u>https://signals-outlook-</u> builds.s3.amazonaws.com/outlook/vsto/setup.exe. When prompted click **Run**.
- 17. Several pop-up boxes may appear in succession where you need to click **Install**.



- 18. Restart **Outlook**. If the HubSpot icon appears in the top right of the screen, installation has been successful
- 19. Once complete you may need to restart your computer for the add-on to be fully integrated with **Outlook**.

**NB** if at any time during the process security messages popup from your desktop or antivirus software please allow access for the installation to continue.

## Section 2 - CRM set up

#### Viewing current/creating new properties

20. To view and create new properties, click the dropdown arrow in the top left corner of the HubSpot toolbar and choose **Sales**, then click **Settings**.

ontacts	×									(	9 –		6
$\leftarrow$ $\rightarrow$ C $\triangleq$ Se	cure   https://a	pp.hubspot.com	/contacts/2828623/c	ontacts/list/view/a	all/?						7	2	•
👖 Apps 👔 World	Golf Tour 🏾 🏷 H	ow to Set Up Lifecy	👌 How to filter you	r cor 📙 New folde	er							Other	r bookn
汝 Marketing 👻	Dashboard	Contacts -	Lead Capture –	Settings					1	n ((• <mark>)</mark>	()	face2 Hub	2faceHI ID: 282
Marketing													
Sales	ts					Search for a contact	Q	Customize -	Imp	ort	Add	conta	act

21. Click **Properties**<sup>1</sup> from the left menu. To see if there is an existing property enter a search term<sup>2</sup> i.e. mobile phone number. If there is a mobile phone number property, this can be added to your customised database. If there isn't, click the **Create a property**<sup>3</sup> button.

Sales <del>⊽</del>	Dashboard	Contacts	Companies	Deals	Tasks	Sales Tools	Settings		Search		\$	🕅 (🐢 💮 – face Hub
Set	tings											
Accou	nt Defaults		Property s	settings	S						3	
Conta	cts & Companies		Contact pro	perties	Cor	npany propertie	s Deal pr	operties				<
Install	Code & Tracking											
Integra	ations	~				Se Se	earch for a prop	erty	c	Create a prop	perty group	Create a property
Marke	ting	~		2	/							
Proper	rties		<ul> <li>Conta</li> </ul>	act	, mat	ion					Edit group	name   Delete group
Sales		~	LABEL	<u>.</u>						LISED IN 🚖		
Users	& Teams		DIDLL	•				CASTOLO		0520111 4		
			Addre	e <b>ss 1</b> line text				Sarah Sho	ort		0	

1 1

22. Add the new property name<sup>1</sup> and a short description<sup>2</sup> and then choose a **Field type**<sup>3</sup>. Click on the dropdown arrow in the **Field type**<sup>4</sup> box to view the list of options available.

	Create a new property	×
_	Label	
1.	New property name	
	Internal name	θ
	new_property_name	
	Description Option	nal
2.		
	Group	
	Contact Information	
	Field type	
	 Single-line text	◀
	Show in forms Turn this off if you do not want this property to be used in forms or lead flows.	
	Create Cancel	

- 23. There are several **Field types** available but we generally only use the following;
  - **Multiple checkboxes** contains several specific options, you might be used to seeing these fields with the help text *Check all that apply* more than one option can be ticked, i.e. you may have a client that is on FACEit but also has an additional Project.
  - Dropdown select contains several specific options and the user is limited to selecting only one of the options.
  - **Radio select** (*Select a single option*) acts the same way as dropdown select, contains several concrete options and the user can select only one of the options.

- **Single-line text** can contain a string of any alphanumeric characters, such as a word, a phrase, or a sentence. (*This is the default option*)
- **Multi-line text** can contain several strings of alphanumeric characters, such as a paragraph or list of items.
- 24. When choosing **Multiple checkboxes**, **Dropdown select** and **Radio select** you will also need to add the options the user can select, i.e. for Client type the options may be FACEit, Ad hoc or Project. Every time you want to add a new option click **+Add an option**.

G	iroup	
	Contact Information	
F	ield type	
	Multiple checkboxes	
	FACEit	
	Ad hoc	
	Project	
	+Add an option	
	Show in forms Turn this off if you do not want this property to be used in forms or lead flows.	<ul> <li></li> </ul>

**NB** Ignore the 'Show in Forms' option as this is only used in the paid version of HubSpot.

25. When complete, click **Create** and the new property will be ready for use. Continue this process until you have all the properties you require.

## **Managing properties**

### Setting default properties to view on contact record/creating contacts

Setting default properties allows you to change/manage which properties will appear by default in the **About** section on contacts as well as in the dialog box when you create a new contact.

26. Click the dropdown arrow in the top left corner of the HubSpot toolbar and choose **Sales**, then click **Settings**.

🏷 Contacts	×		θ - σ
← → C 🔒 Se	cure   https://app.hubspot.com/contacts/2828623/contacts/list/view/all/?		☆ 🤗 💷
🔛 Apps 📔 World	Golf Tour 🛛 🏂 How to Set Up Lifecy 🛛 🏂 How to filter your cor 🔋 📒 New folder		G. Other bookn
汝 Marketing 👻	Dashboard Contacts - Lead Capture - Settings	Search	🗢 🕼 🧑 – face2faceHi Hub ID: 282
Marketing			
Jales	ts	Search for a contact <b>Q</b>	Customize - Import Add contact

27. In the left sidebar menu, navigate to Contacts & Companies<sup>1</sup>. Click Manage next to Set the properties your team sees on contact record<sup>2</sup>/Set the properties your team sees when creating contacts<sup>3</sup>.

Settings				
Account Defaults		Contacts		
Contacts & Comp	anies	Set the properties your team sees on contact records.		2
Install Code & Tra	cking	Choose the properties that will be displayed on all contact records for all users in your CRM.	Manage	
Integrations	~	Set the properties your team sees when creating contacts.		3
Marketing	~	Choose the properties that will be displayed when any user in your CRM creates a contact, and which of those properties are	Manage	
Properties		required in order to create a contact.		
Sales	~	Sync record ownership between contacts and companies.		
Users & Teams		Assign ownership of unowned companies to the owner of the first contact at that company.		

28. If the following popup appears, click **Start from default properties**.

1

	ways to any again with an theory
	your team sees when they
	create contacts.
V	Vould you like to start with your account's default properties, or yould you like to start from scratch?

29. If not, in the next dialog box search or browse for properties you'd like to add and check the box next to a property to add it to the **Selected properties** column. Click on the far-left side of a property in the **Selected properties** column and drag to rearrange the properties. Click **Save changes**.

Search properties	Q SELECTED PROPERTIES (22) REQUI
	Email
Contact Information	First name
Address 2	Last name
Address 3	Contacts will need either an email address
Annual revenue	or name in order to be created.
Category	HubSpot owner
City	Job title
Close date	

#### Customising columns viewed in main contacts screen

You also can change the columns displayed in the main **Contacts** screen.

30. Navigate to **Contacts** and click the **Customise** dropdown in the top right corner of the page and select **Edit columns**.

						-	
Contacts			Search fo	r a contact Q	Customize *	Import	Add contact
			-		Edit columns		
All contacts	NAME ÷	EMAIL ‡		LEAD STATUS	Edit properties	MOBILE NUMBER	SOURCE

- 31. Search or browse for the property you'd like to add<sup>1</sup>. Once you've found the property you'd like to add, check the box next to it to add it to the **Selected columns** section<sup>2</sup>.
- Click the X<sup>3</sup> to the right of any contacts in the Selected columns section to remove them from your view or click and drag properties<sup>4</sup> in this section to rearrange the order of columns.
- 33. When you've finished adding and/or removing properties, click **Save**.

Choose which columns you see		×
Search properties	Q SELECTED COLUMNS (6)	
	Name	
Address 1	Email	-
Address 2	Category	×
Address 3	Lead status	×
Annual revenue	Mobile number	×
Associated company	Source	×
Associated deals	•	
Don't see the property you're looking for? Create a pro	perty	
-> Save Cancel	Remove a	ll columns

## Section 3 - Using the CRM

**NB** all contacts have been removed for data protection reasons.

#### **Adding contacts**

34. To manually add contacts, in the **Contacts** dashboard click **Add contact**.



35. **Email, First name** and **Last name** and will appear here by default. Enter information for one of these properties to view the default properties that have been set up for the database. Once information has been entered for the new contact, click **Create contact**.

Add a contact	× Add a contact ×
Email	Email
First name	First name
Last name	Last name Bloggs
	HubSpot owner Sarah Short (sarah.short@face2facehr.com)
	Job title
Create contact Create and add another Cancel	Create contact Create and add another Cancel

36. Click the contact's name from the contacts dashboard to see the full record.



## **Filtering contacts**

37. In the **Contacts** dashboard click **Add filter** in the left sidebar to create a new custom view.

🏷 Sales	Dashboard	Contacts	Companies	Deals	Tasks	Sales Tools 👻	Settings				•) اچ	)) co 99
Со	ntacts				(	Search for a co	ntact		٩	Actions -	Import	Add contact
View All c	contacts											Î
416 cor + <u>Ade</u>	ntacts Option	•										
		-										
		¢				∠ Prev	1 2 3 4	5 Next > 1	00 per page	-		Q Help

38. To search for the property enter the search criteria in the **Filter contacts by** box or browse by scrolling in the sidebar.

<mark>۶ Sales</mark> Dashboard Con	acts Companies	Deals Tasks	Sales Tools 👻	Settings	Search	<b>()</b>
Contacts			Search for a cont	act	Q Actions -	Import Add contact
View All contacts	NAME			EMAIL	PHONE NUMBER	TYPE OF COMPANY
< Back Showing 416 contacts						
Filter contacts by						
Address 1						
Address 2						
Address 3 Annual Revenue	4					, ,
Appt date & time			< Prev 1	2 3 4 5 Next >	100 per page 👻	Q Help

39. For this example, we'll use **Client type**. Once the property has been located, click to set the criteria for that property.

Sales Dashboard	Contacts Companies	Deals Tasks	Sales Tools 👻 Settings	Search	((●))
Contacts			Search for a contact	Q Actions -	Import Add contact
View All contacts	NAME		EMAIL	PHONE NUMBER	TYPE OF COMPANY
< Back Showing 416 contacts Client type					
Contact Information					
Client type	•				
				4 5 Next > 100 per page -	Q He

40. Next, we'll be filtering contacts whose **Client type<sup>1</sup>** is **FACEit**; select the **is any of**<sup>2</sup> option, choose **FACEit**<sup>3</sup> from the dropdown, click **Apply filter**<sup>4</sup>.

2	Sales Dashboard Contac	cts Companies Deals	Tasks Sales Tools -	Settings	Search	. ا	(•))
	Contacts			Search for a contact	٩	Actions *	Add contact
	View All contacts	NAME		EMAIL	PHONE NUMBER	TYPE OF COMPANY	
	< Back Showing 416 contacts						
	Client type     is any of     Search						
	FACEit t contain						
	Project WN Apply filter						
				< Prev 1 2 3 4	5 Next > 100 per page	*	Q Help

41. This view can be saved for future use to quickly view the current FACEit clients. Click **Save**, give this view a name and select **Everyone**.

Sales Dashboard Contacts	Companies Deals Tasks	a Sales Tools	Save	×
Contacts		Search for a contact	FACEit clients	
All contacts 9 contacts  Options Client type is any of "FACEIt" * Add filter Save Reset	PHONE NUMBER	TYPE OF COMPANY	Change the audience for this filter <ul> <li>Private</li> <li>Your team</li> <li>Everyone</li> </ul> <li>Save Cancel</li>	

42. Saved filters can be returned to at any time by selecting **All saved filters** to the left of the main contacts screen.

<mark>ồ Marketing</mark> 👻 Dashboard	Contacts - Lead Capture - Settings		Search		(Initial Initial Initia
All contact save	ed filters (7)		S	iearch	٩
All contacts	Standard	Created by me		Created by others	
< Back to contacts	All contacts	FACEit clients			
	My contacts				
	My recently assigned contacts				
	My uncontacted				
	Needs email follow-up				
	Needs next action				

**NB:** Additional filters can be added using any of the default or custom contact properties created, for example, to find out the renewal dates for all FACEit clients;

```
Add filter > "filter contacts by" Client type > "is any of" FACEit > Apply Filter,
Add filter > "filter contacts by" > Renewal Date > "is known" > Apply Filter > Save
```

- 43. Three actions are available as a result of filtering, all of which are found in the **Options** dropdown in the left sidebar:
  - Clone: this will clone the current view so a modified version can be viewed/saved later;
  - Export: to an Excel file of the contacts in the current view; and
  - Make default: this will set the current view as the default when viewing contacts.

Со	Contacts							
All con	tacts							
All sav	ved filters >							
<b>All co</b> 110 c	All contacts 110 contacts Options *							
C Pi	Remove from favorites							
+4	Create report from vie	w 🖨						
Sa	Sa Clone							
	Export	- 1						
	Make default							

## **Exporting contacts**

44. First start by clicking **Export** (see above). From the Export popup click on the dropdown arrow in the **File format** box and select **XLS** or **XLSX** depending on which version of Excel is used, click **Export**.

Export X	Export X
Email Your export will be sent to this email	Email Your export will be sent to this email
sarah.short@face2facehr.com	sarah.short@face2facehr.com
File format	File format
CSV	CSV
Properties	CSV
Include only current columns	XLS
<ul> <li>Include all properties</li> </ul>	XLSX
Not getting our emails? Make sure that you've added HubSpot email addresses to <b>your whitelist </b>	Not getting our emails? Make sure that you've added HubSpot email addresses to <b>your whitelist </b>
Export Cancel	Export Cancel

45. An email will be generated advising when the export is ready for download.

### Adding notes, activities and tasks

In the box above the timeline in any of your contacts you will see various options where you can add notes, log activities or create tasks specific to that contact. The **Call** option can only be used in the paid version of the CRM and the **Schedule** option currently only works with Google Calendar.

#### Adding a note

46. Navigate to Contacts and locate the contact you want to add a note to and begin typing in the box. You can also create a follow-up task associated with this note; check the box next to Create a follow-up task and choose in how many days you want reminding, click Save note.

Contacts		
Sarah Short	🗷 New note 🛛 Email 📞 Call 🕂 Log activity	🗔 Create task 🛛 👼 Schedule
Business manager at face2faceHR	Start typing to leave a note	1 business day
		2 business days
	A 8 🗉 🔗	3 business days
<ul> <li>About Sarah Short</li> </ul>	Associated with	4 business days
First name	🔞 Sarah Short 🛛 👰 face2faceHR ×	5 business days
Sarah	+ Add a company - + Add a deal -	Custom date
Short	Save note Discard Preate a task to follow up	in 3 business days 👻
Email		

47. In that contacts screen, you will now see the note and task you've added both of which can be edited - we'll look at editing tasks later.

Soll	ow up with Sarah Sho	rt	Due Date
			20/12/2017 at 1
Regarding	note logged on Wednesd	lay, 20 December 2017 11:49	
Туре	Assigned to	Email reminder	Queue
To-do	Sarah Short	20/12/2017 at 08:00	None
Associated r	ecords ah Short 🧕 face2face	eHR	
Associated r	ecords ah Short 🧖 face2faco per 2017	eHR	

48. You can also pin a specific note to the top of a contact; locate the existing note (or create a new note by typing in the text box etc.), click **Actions** > **Pin**.



49. You have successfully pinned your note (as indicated by the pin thumbnail) to the top of the record. Only one note can be pinned at a time.

Pinne	ed	Filter timeline (11/12) •						
	You left a note about Sarah Short April 13th at 10:29 am	Edit   Actions -						
Start typing to leave a note and then pin to the top of your record								

50. If you'd like to pin a different note in the future, you'll first need to unpin the original note by clicking **Actions** > **Unpin**.

Pinned	ilter timeline (11/12) •
You left a note about Sarah Short April 13th at 10:29 am	Edit <u>Actions</u> •
Start typing to leave a note and then pin to the top of your record	Delete Unpin

### Log an activity

51. Whilst in a specific contact's record, click + Log activity. The box below will allow you to log the activity accordingly. You can choose to log a call, log an email, or log a meeting. Enter text to describe your activity.



52. When logging a call, you can use the **Select an outcome** dropdown to categorize the call.



53. Click the **date** and **time** at the upper right to change the date and time of the activity. When you are done, click **Log activity**.

	🗹 New note	🐱 Email	📞 Call	+ Log activity	🗔 Create task	觉 Schedule	9						
	Log a call 👻	Connecte	ed 🔻			<b>D</b>	20/12/	2017	- (Q)	12:54	•		
	Describe the ca	Ш							Decer	nber	2017		•
							Мо	Tu	We	Th	Fr	Sa	Su
		0									1	2	3
<b>1</b>	AUE	Ű					4	5	6	7	8	9	10
	Log activity	Discard	Creat	e a follow-up task			11	12	13	14	15	16	17
	Log delivity	Chibedra		e a lonow-up task			18	19	20	21	22	23	24
	Activity	Notes	Emails	Calls	Tasks		25	26	27	28	29	30	31
	Dec	ember	2017					Toda	y			Clear	

54. Once saved, this logged activity will display in the contact's timeline. To edit or delete a previously logged activity, locate the activity in the timeline and click Edit to make changes, or click Actions > Delete to remove the activity from the timeline.



#### Creating and editing tasks

55. Whilst in a specific contact's record, click **Create Task**. Enter the details for your task; you can include "call" or "email" in the title of your task to automatically assign the corresponding task type. Click **Save task**.

🗹 New note	🐱 Email	📞 Call	+ Log activity	🗖 Create task	莭 Schedule		
Email/call or	something	else				Due Date Tomorrow ▼	Add a time
Notes							
BIŲ	€ 🗐						
<sup>Type</sup> Email ▼	Assigned Sarah S	l to hort ▼	Email ren <b>The day</b>	ninder of ▼ 🧐 08:00 ▼	Que	eue ne ▼	
Associated reco	rds Short	face2faceHF	२ × +Add a dea	I			
Save Task	Cancel						

56. You can also create a task from the Tasks dashboard and associate it with a contact. In the Sales dashboard navigate to Tasks in the main navigation bar, click the Create a task button, enter a title and adjust due date as needed, click Add Task or Add and edit which will open the task up.

<b>ò Sales</b> Dashboard	Contacts Companies Deals Tasks S	ales Tools 👻 Settings	Search	(•)
Tasks Table	Board			Actions - Create a task
				Title
Open tasks	Sarah Short 🔹 All types 👻 A	II time ▼		Follow up with Sarah Short
Due today				Due date
Due this week				13/04/2017 at 08:00 -
Overdue			×=0=	
Completed				Add task Add and edit Cancel
		You	re all caught up (	
QUEUES	EW			
+ Add a queue				

57. In the dialogue box that appears, you can add/edit the following; add a contact or company, set a due date, set an email reminder, add any notes for your task (click **Save** to save any changes you make specific to notes), set your task type, assign your task to someone and close to finish.

	Follow up with Sarah Short
Deactivated User 👻 All types 👻 All time 👻	Associated Records
П тите	+ Add a contact + Add a company + Add a deal
Follow up with Andy	Due date
	12/16/2016
	Email reminder
Send payment Link to Charlie	12/16/2016 at 12:00 am 💌
Email PDF to Joe	Notes
Say What's Up to Jim	Please follow up after your demo.
Follow up with Sarah Short	BIU Ø
	Save
	Туре
	To-do 🔹
	Assigned to
	Emily Keefe (ekeefe@hubspot.com)

58. You can also edit your task in the dashboard, click on the **task name** to edit and complete as per 57 above.

汝 Sales	Dashboard	Contacts	Companies	Deals	Tasks	Sales Tools -	Settings	Search		\$	((*)
Task	S Table	Board								Actions -	Create a task
Open ta	sks	Sar	ah Short 👻	All types	•	All time 👻			Search for a task		٩
Due tod Due this	ay week		TITLE					TYPE ASSOCIA	TED WITH	DUE DATE (GN	1T+1) 🔺
Overdue	9		Fol	low up wit	h Sarah Sł	nort				Today at 08:0	00

59. You can filter your tasks by owner/user, type or due dates. You can also use the left side menu to quickly go to tasks due today, this week, overdue or those which have been completed.

Tasks			Table Board Actions - Create a task
Open tasks	Sarah Short Y All types Y All time Y		Search for a task Q
Due today Due this week	TITLE \$	TYPE 🗘 ASSOCIATED WITH	DUE DATE
Overdue	Call sarah	<b>O</b>	Tomorrow
Completed	Email Sarah re		Tomorrow
	Follow up with Yvonne Larkin	🖂 👘 Yvonne Larkin	3 Nov 2017 - 08:00
QUEUES	Follow up with Sarah Short	🖂 🛛 👸 Sarah Short	Today at 12:15
email followups			
+Add a queue			

60. Once you've created your task, it will appear on the timeline of any associated records. Locate the task where it appears in the timeline, then choose **Actions** > **Edit** to make changes if necessary.

۲	New task	Actions -
	Follow up with Sarah Short	Edit

61. Once you've taken care of a task, click on the circular **checkbox** to the left to mark it as completed.

Tasks Table B	loard		Actions • Create a task
Open tasks	Sarah Short * All types * All time *	Search for a task	٩
Due today	Пти	TYPE ASSOCIATED WITH	DUE DATE (GMT+1)
Overdue	Follow up with Sarah Short		Today at 08:00
Completed			

NB: Also in the box above the timeline you will see an **Email** option where you can email your contact from their record, but we recommend emailing directly from **Outlook** and selecting **Track Email** to enable tracking and **Log to CRM** to add the email to that contact's record – see below

## Sending email, log to CRM and creating templates

#### Sending email/log to CRM

62. Navigate to your **Outlook** inbox, select **New Email** to create a new message, add recipient, subject and main email body text.

	5 0 1	• Untitled - Message (HTML)	0 – 0 ×
File	Message	Insert Options Format Text Review Help $Q$ Tell me what you want to do	
Paste	K Cut Copy ✓ Format Painter Iipboard □	B     I     Image: Contact Profiles       B     I     Image: Contact Profiles       Basic Text     Names         Include         Include	
	From 🔻	sarah.short@face2facehr.com	HubSpot Sales • ×
Send	To	Eleanor Deem <eleanor deem@face2facehr.com=""></eleanor>	Search for a contact Q
	Cc		Actions -
	Bcc		Eleanor Deem
	Subject		eleanor.deem@face2faceHR.com
With	kind regards,		> About
Sarah	ı		> Company
Sarah Busin	n Short Jess Manager		> Deals
Tel: (	0800 180 499		> Tasks
Mobi	ile: 07761 347	120	✓ Timeline
fo	ce2fc	portners foce2foceHR	Opened RE: 2016/17 HR and Partners accounts December 21, 2017 7:39 AM

63. Select **Track Email** (to enable tracking) and **Log to CRM** (to add the email to that contact's record in the CRM) then send email as usual.

File	Message	Insert Options Format Text Rev	iew Help 🗘 Tell me what you want t	to do	
Paste	Cut Copy Format Painter	$ \begin{array}{c c} & & & \\ \hline \\ \hline$	Address Check Attach Attach Signature Book Names File - Item	Follow Up -     High Importance     Low Importance     Tools-     Contact Profiles     Contact Profiles     Track Email     Low Importance     Tools-     Log to CRM	
Clip	board 🛛	Basic Text	Names Include	Tags 🕞 HubSpot 🗟	

#### Creating email templates

**NB:** You can only create five email templates in the free version of HubSpot CRM.

64. Click the dropdown arrow in the top left corner of the HubSpot toolbar and choose **Sales**, then click on the dropdown arrow in **Sales Tools** and choose **Templates**.

🎾 Sales - Dashboard Contacts Companies Deals Tasks	Sales Tools 👻	Settings	Search	(••) 💮 – face2faceHR Hub ID: 2828
	Notifications			
Sales Dashboard 👻	Sequences		New dashboard 🏚 🛛 Export	Share - Add report
	Documents Prospects			
;;:: Filtef Gashboard	Meetings			Visibility: Shared Settings *

65. Click **New template** and select **From scratch**.

🏷 Sales	<ul> <li>Dashboard</li> </ul>	Contacts	Companies	Deals	Tasks	Sales Tools 👻	Settings	Search	\$	((⊕))	<b>(</b> ) -	face2fa Hub ID:
-	[emplate:	S										е 🕶
									From scratch			
	Manage	Analyze							From tomplato	librany		
								/	from template	library		

66. Enter a **Template name**<sup>1</sup>, add **subject line**<sup>2</sup> and type the **body**<sup>3</sup> of the email. Use the **formatting options**<sup>4</sup> at the bottom of the editing window to modify the text, i.e. to change font etc.

Name: Send invoice 🚽 1 Select a Folder 🔻
Subject: Invoice number xxx for xxx < 2
<ul> <li>Lorem ipsum dolor sit amet, alterum legimus menandri eos eu, mollis invidunt no duo, mel ad nisl maiorum. Munere libris lobortis ut sea, ei tation efficiantur neglegentur vel. At dolore aliquip salutandi vis, at alia legimus cum. Vim et gloriatur constituam interesset, vidisse menandri persegueris mei no. Inimicus suscipiantur eu cum. Accusata salutatus ius ad, ex elitr omnes vim, prima exerci cu duo.</li> <li>His meliore repudiandae voluptatibus cu. In copiosae invidunt consetetur vim, est ex malis inermis. Ea eos possit feugiat accusamus, pro utamur conclusionemque at. Stet recusabo cu vim. Vel mucius aeterno pertinacia an, elit commodo impetus mel et.</li> </ul>
4

67. To include personalization in the email template i.e. Dear John or Dear Mr Bloggs, click the **Contact token** at the bottom of the screen. Using the search facility, find the property to add, i.e. **First name** and select that property.

Name:	Shared ▼ ■ Select a Folder ▼
Subject:	
Dear Contact First name	
	First name
	CONTACT INFORMATION
	First name
A 🖾 🗄 Insert: 📃 Snippets 👻 🖻 Document 👻 🌡	Contact token 🔻 🖬 Company token 🝷 👼 Meeting link 🚽

68. When you've finished setting up your template, click **Save template**.

69. You can now view your new template in the current list. To edit simply click on the name and the template will open for editing.

1		
plates		Q New folder
CREATED BY	DATE CREATED	DATE MODIFIED
Sarah Short	8 months ago	8 months ago
Sarah Short	a few seconds ago	a few seconds ago
	CREATED BY Sarah Short Sarah Short	CREATED BY     DATE CREATED       Sarah Short     8 months ago       Sarah Short     a few seconds ago

70. To send an email using a template you've created simply complete steps 62 and 63 above and then click on **Templates**. If you can't see the template in the popup box, click on the down arrow next to **View** and choose **All**.

<b>⊟</b> 5		, Ŧ				Untitled - Message (HTML)
File	Message	Insert O	ptions Format Text Review	v Help 🗘 Tell me w	/hat vou want to do	_
Paste	Cut Copy Format Painter board 🕞	BIU	Templates -	View: All	arch by n. <b>Q</b>	P - ☐ Templates Contact Profiles     ortance     ortance     ortance     ☐ Documents     ☐ Log to CRM     ☐ HubSpot Sales Tools     HubSpot Sales
Ŧ <b></b>	From <b>T</b> o	sarah.short@ <sup>.</sup> <u>Eleanor Deer</u>	You've created 3 o	All Recent	Unlock more te with <u>Sales Starter.</u>	en
Send	Cc	2828623@bc	NAME	Created by me		
	Bcc Subject	2020025@86	face2faceHR Partners r	esponse to first regist	ration	
With ki	nd regards,		To: eleanor.deem@face?	2faceHR.com	<u>لا</u>	× >

71. Double click on the template you want to send as an email.



72. The text that you created in the template will appear and all you need to do now is hit **Send**.

# **Section 4 - Troubleshooting**

#### **Disabling contact profiles**

With the HubSpot CRM, you can use Contact profiles to see details of the contact you intend to email. When composing a message, a panel will appear on the right side of the compose window with information about the recipient. Contact profiles are helpful, but they can slow Outlook down so you may choose to disable this function.

- <b>R</b> - *		Untitled - Message (HTML)	
File	Message	Insert Options FormatText Review $\mathbb Q$ Tell me what you want to do	
Paste	Cut Copy Format Painter board ि	Tahoma * 10 * A A E = + E + A       A A       A A       A A       B A       A A       B A	^
	From 🔻	sarah.short@face2/acehr.com	<b>~</b> ×
1_1	То	Eleanor Deem <eleanor deem@face2facehr.com="">;</eleanor>	HUDSPOT SALES
Send	Cc	28286238bcc.hubsot.com	C 🖉 🦻
	Bcc		Eleanor Deem
	sanjeer		Managing Director
With ki	nd regards,		face2faceHR
Sarah			
Sarah	Short		- ABOUT ELEANOR
Busine	ss Manager		First Name
Tel: 08 Mobile	300 180 4998 07761 347	120	Eleanor
			Last Name
for	e2fc	CEHR FOCEZFOCEHR	Deem
1.00		portners focerfocellk	Email address
This e-r reliance	nail is intende on it or any a	solely for the addressee, is strictly confidential and may also contain legally privileged material. If you are not the addressee please do not read, print, re-transmit, store or act in ttachments. Instead, please email it back to the sender and then immediately and permanently delete it.	eleanor.deem@face2facetfR.com
face2fa	ceHR Ltd is a	rivate limited company registered in England and Wales with registered number 4351086 and VAT registered number 971 7939 66. Our registered office is 6 The Causeway,	Email
(	ichester, odin		eleanor.deem@face2facehr.com
	0	۰ م	)) 🗐 🧖 11:58 29/03/2017 🔕

73. Navigate to your main Outlook window, click the **HubSpot Sales** second dropdown which opens a new popup, uncheck the box next to **Show Contact Profiles.** 

Search People Address Book V T Filter Email - Find Send/Receive HubSpot Send/Receive HubSpot	HubSpot SALES
ch Current Mailbox HubSpot Sales settings RECEIVED Change log and track preferences, blacklisted email addresses, and more.	Plugin Version <b>3.0.1.130</b> Logged In Assarah.short@face2facehr.com
	Sidebar      ✓ Show Contact Profiles      Log and track preferences      Each time you compose a new email, your log and track options will     be set to the preferences you select below.      Log email    ✓ Track email      Never log      Emails sent to addresses you define below will never be saved in your     CRM, even if the log setting is enabled.      Add      OK Cancel

Now when you compose an email to one of your HubSpot contacts you can still track and log the email but you won't see the panel to the right side of the compose window.