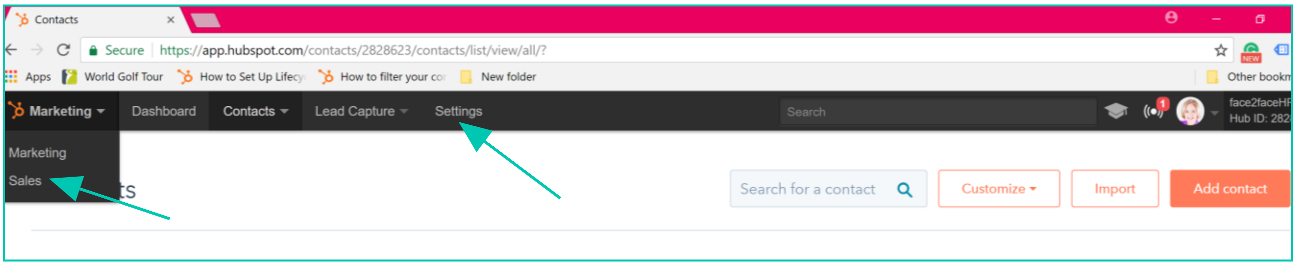
HubSpot CRM user guide

Contents

Section 1 - Outlook set up

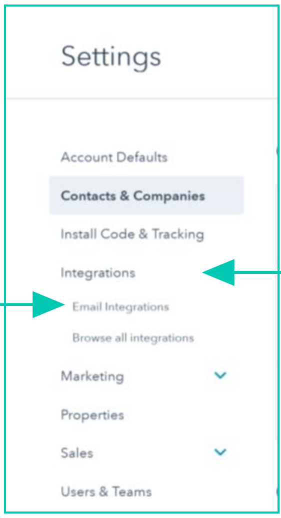
Email integration

1. Log into HubSpot CRM https://www.hubspot.com/ 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**.

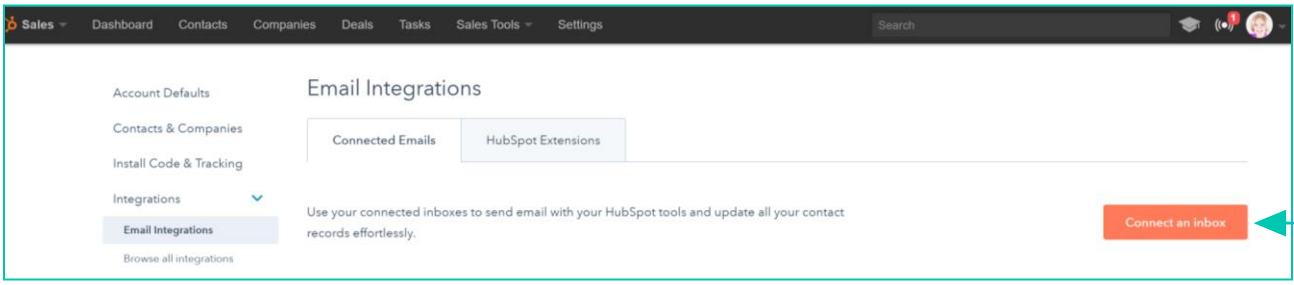


3. From the **Settings** panel click the dropdown arrow next to **Integrations** and choose **Email integrations**.

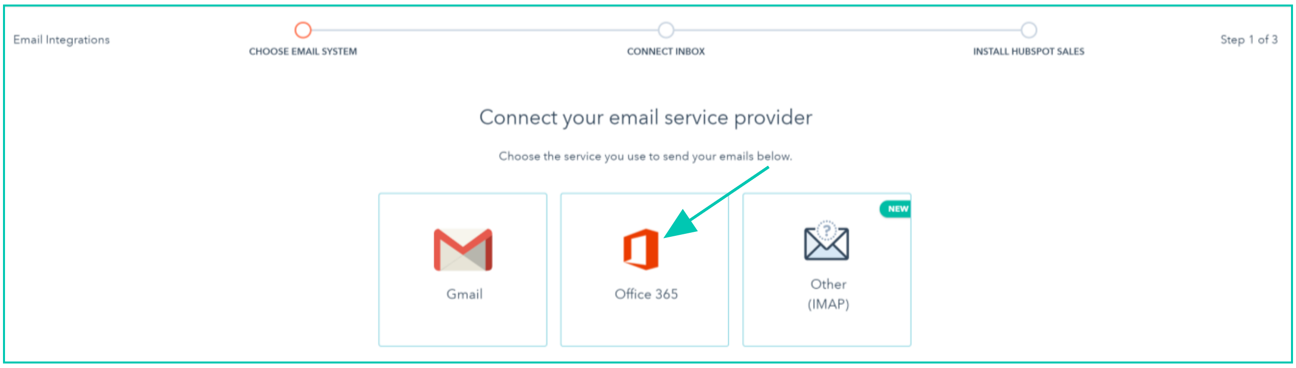
NB: The HubSpot Sales Office 365 add-in requires an **Office 365** account. If you do not have an Office 365 account, contact **Sarah Short** on **0800 180 4998**



4. Click **Connect an inbox**.

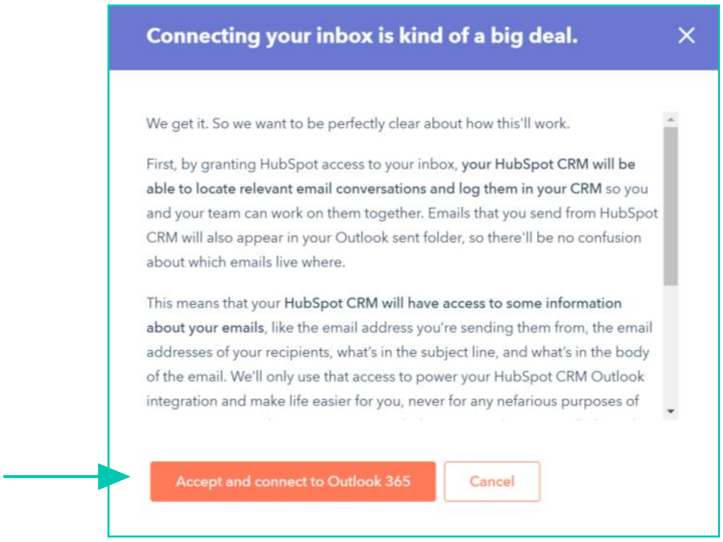


5. Click **Office 365**.

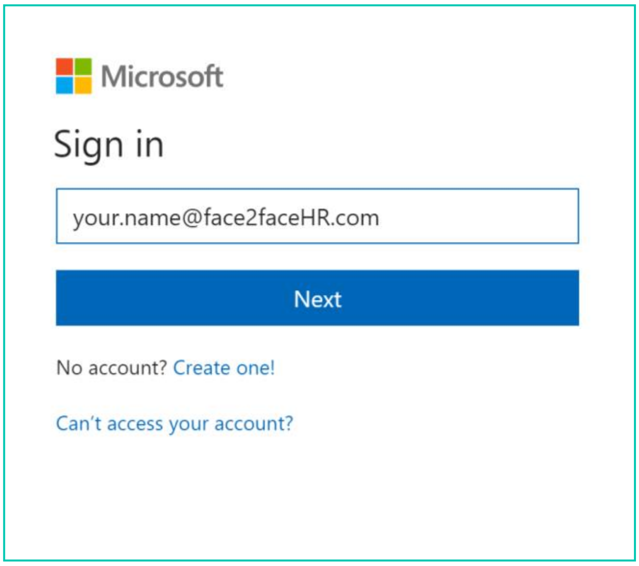


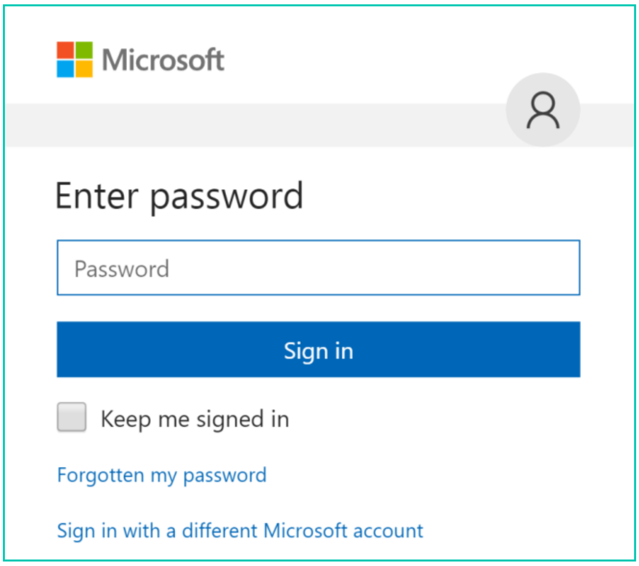
6. Click **Connect inbox**.

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

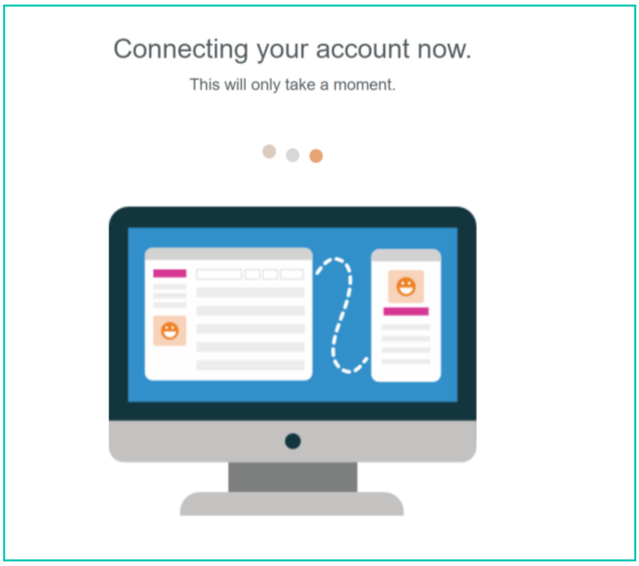


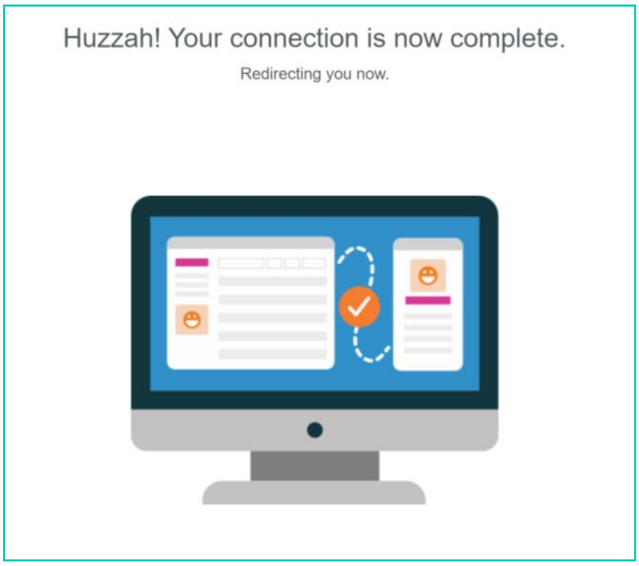
8. From your Office 365 account, login with your Office 365 account details (email address and password) and **<u>not</u>** your HubSpot account login.



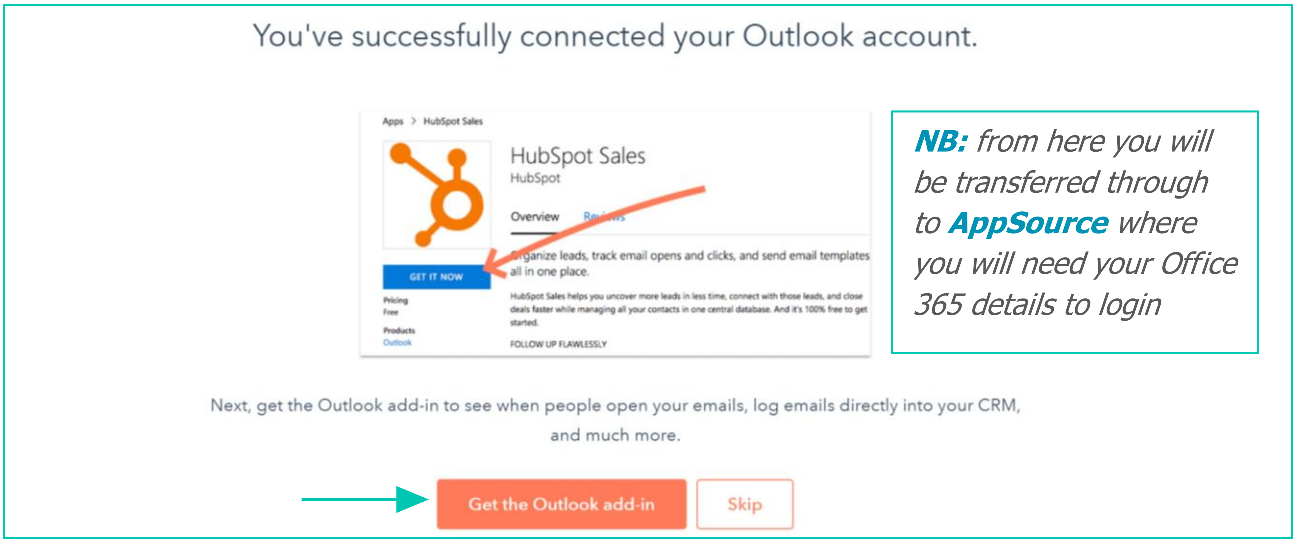


9. The following two screens will show the account being connected.



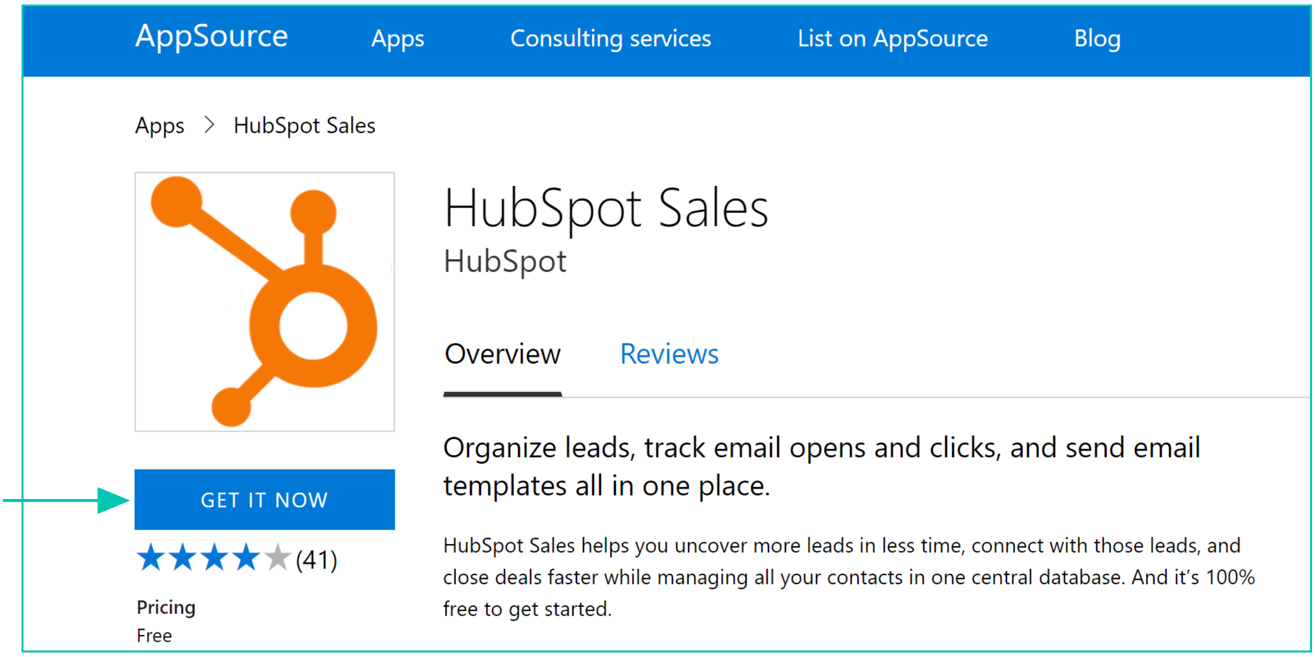


10. In order to link HubSpot to Outlook, click **Get the Outlook add-in**.

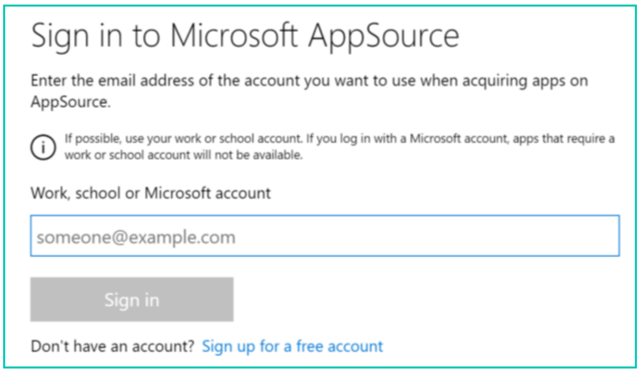


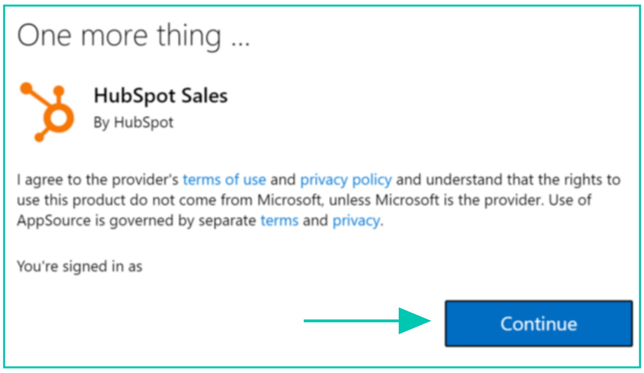
***NB:** from here you will be transferred through to **AppSource** where you will need your Office 365 details to login*

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

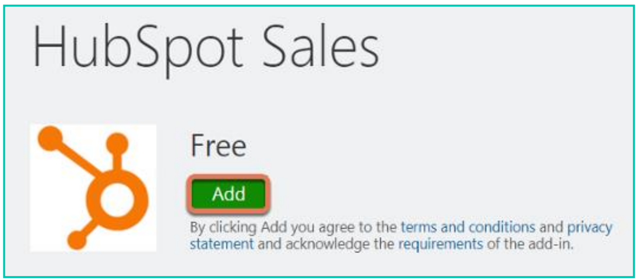


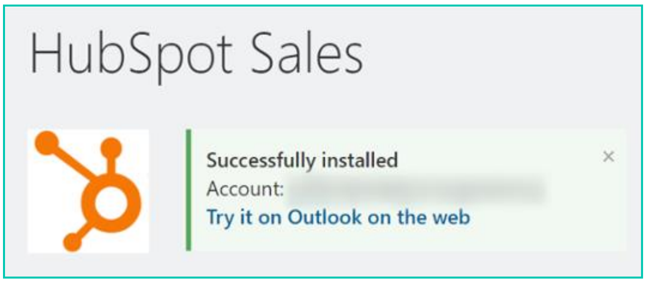
12. If prompted, sign in using your **Office 365** details (box 1) or click **Continue** (box 2).



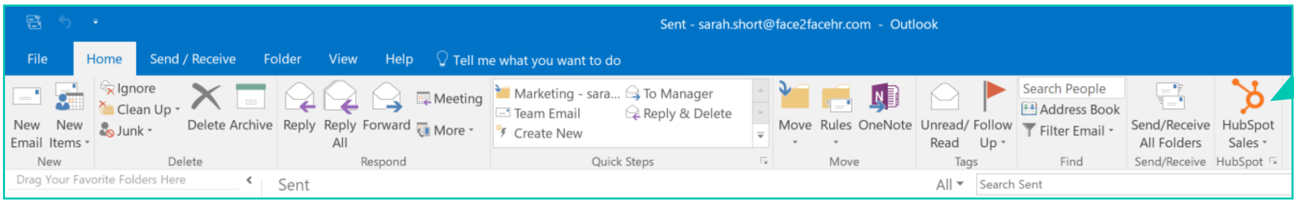


13. Click **Add** (box 1). Once the installation is complete, you will be redirected to a page which indicates the add-in has been successfully installed (box 2).

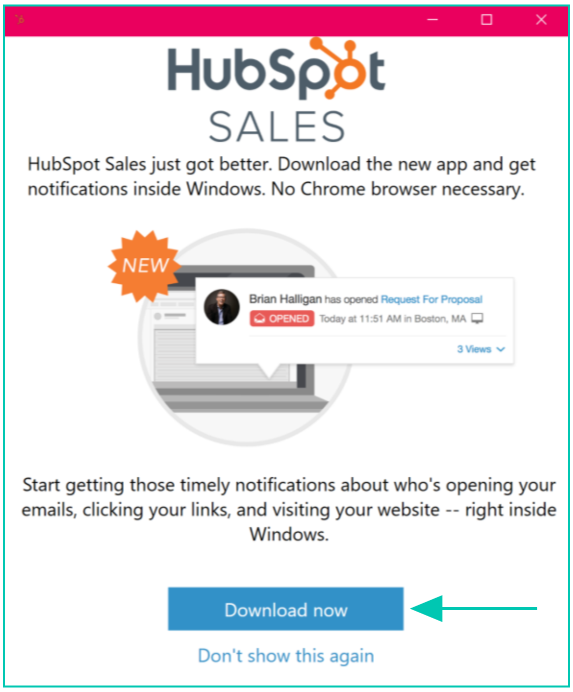




14. Restart **Outlook**. If the installation has been successful, your Outlook screen will now have the HubSpot logo in the top right corner.

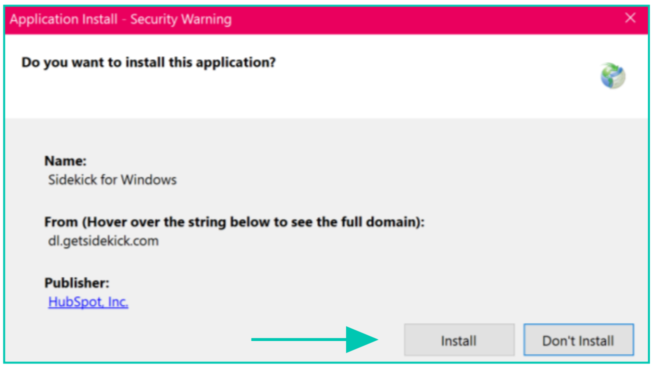


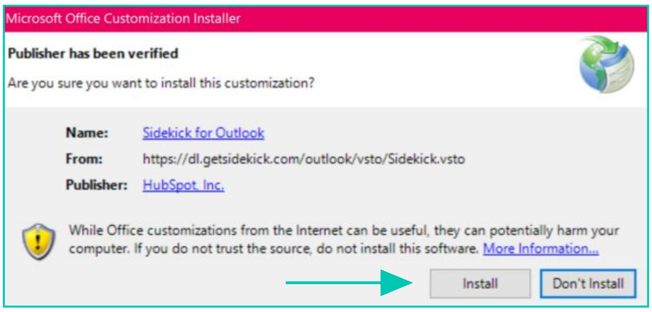
15. Alternatively, the following box may appear, click **Download now**.

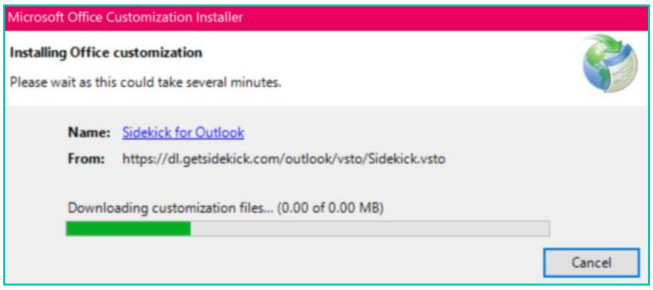


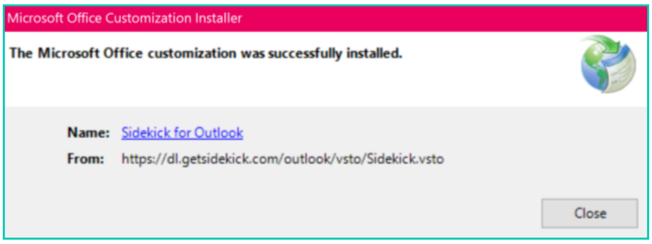
16. If neither of these options work, click on the following link which will take you through an alternative installation process - https://signals-outlook-builds.s3.amazonaws.com/outlook/vsto/setup.exe. When prompted click **Run**.

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

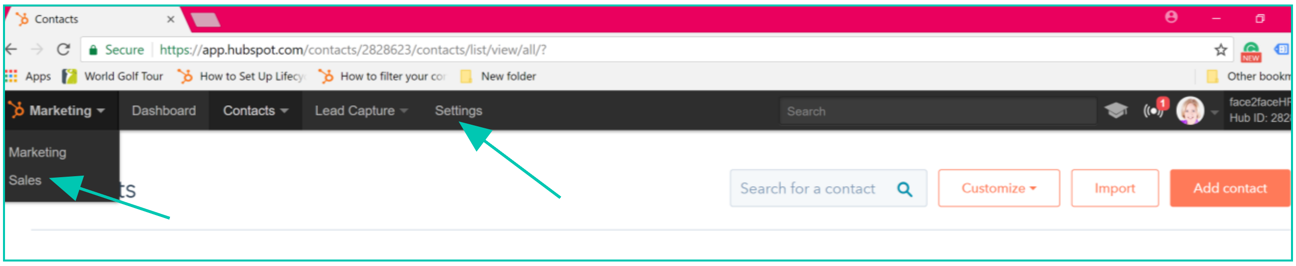
19. Once complete you may need to restart your computer for the add-on to be fully integrated with **Outlook**.

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.

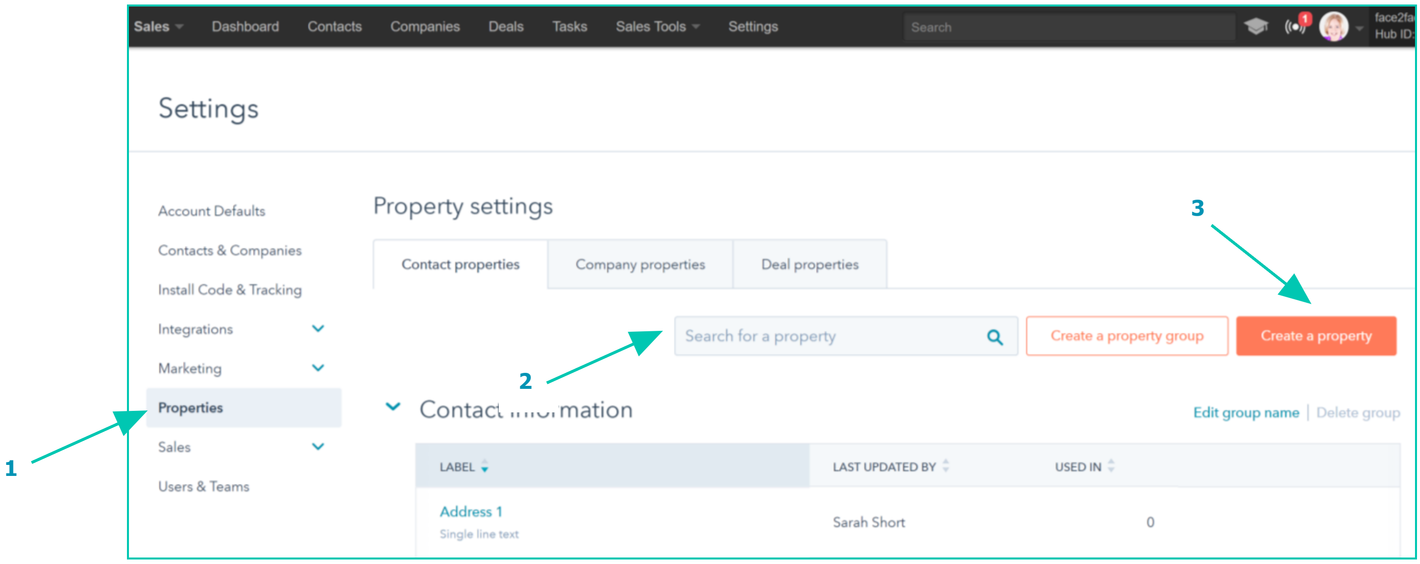
Section 2 - CRM set up

Viewing current/creating new properties

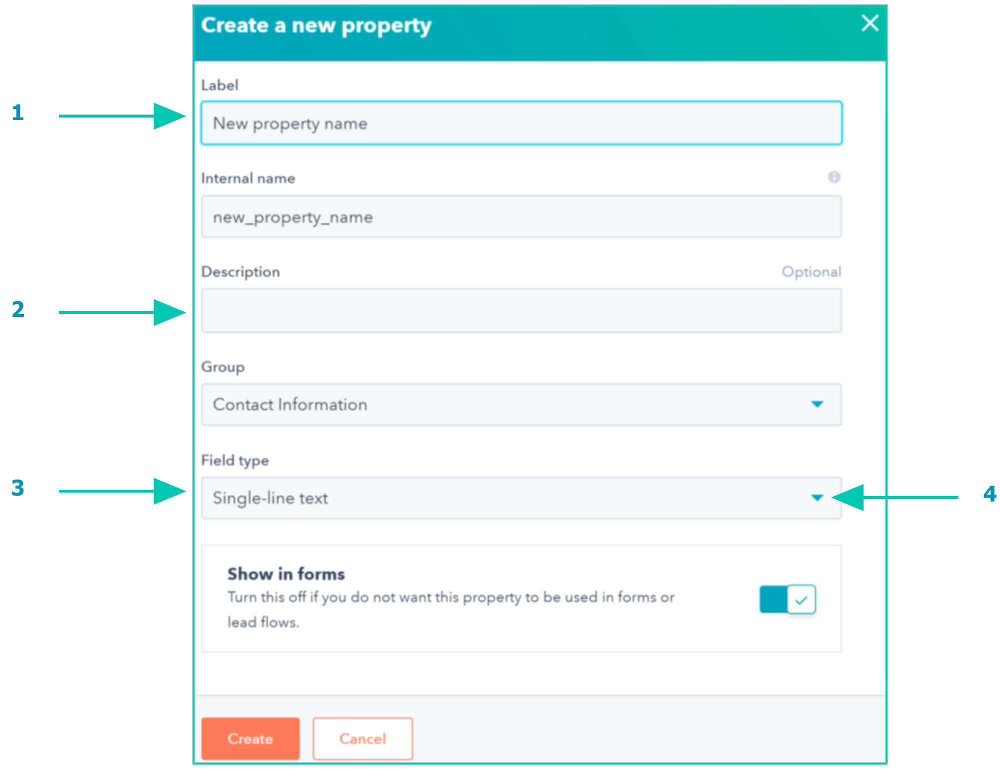
20. To view and create new properties, click the dropdown arrow in the top left corner of the HubSpot toolbar and choose **Sales**, then click **Settings**.



21. Click **Properties**[1] from the left menu. To see if there is an existing property enter a search term[2] 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**[3] button.



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

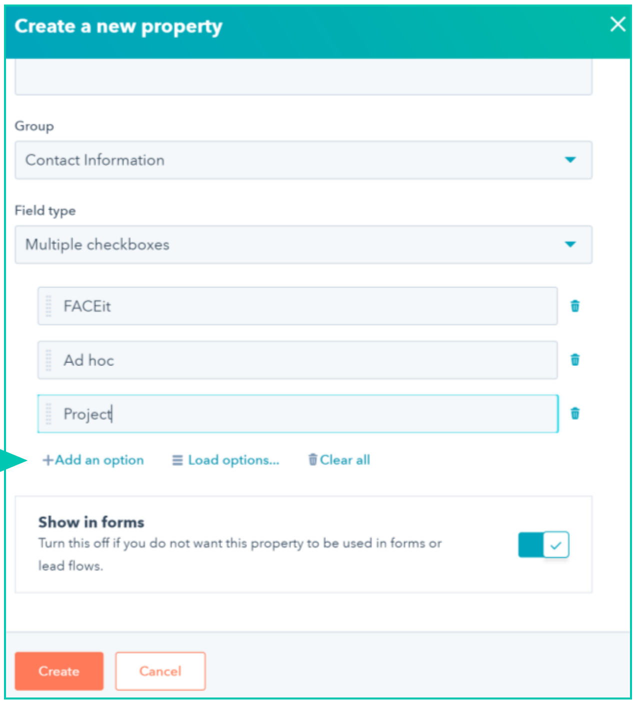


23. There are several **Field types** available but we generally only use the following;

- **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**.



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

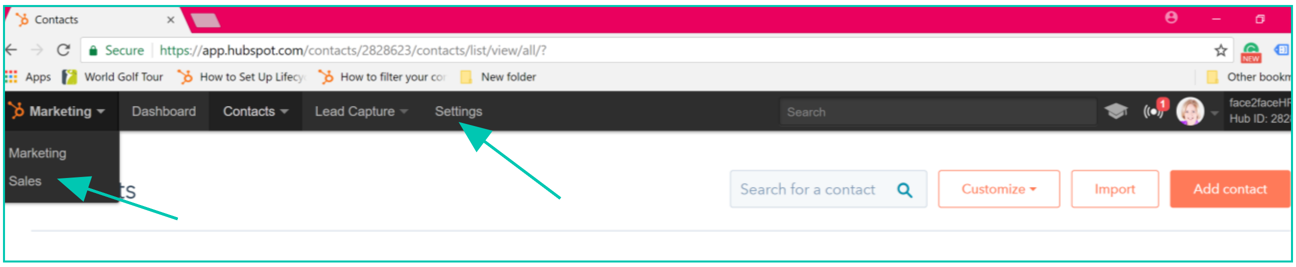
25. When complete, click **Create** and the new property will be ready for use. Continue this process until you have all the properties you require.

Managing properties

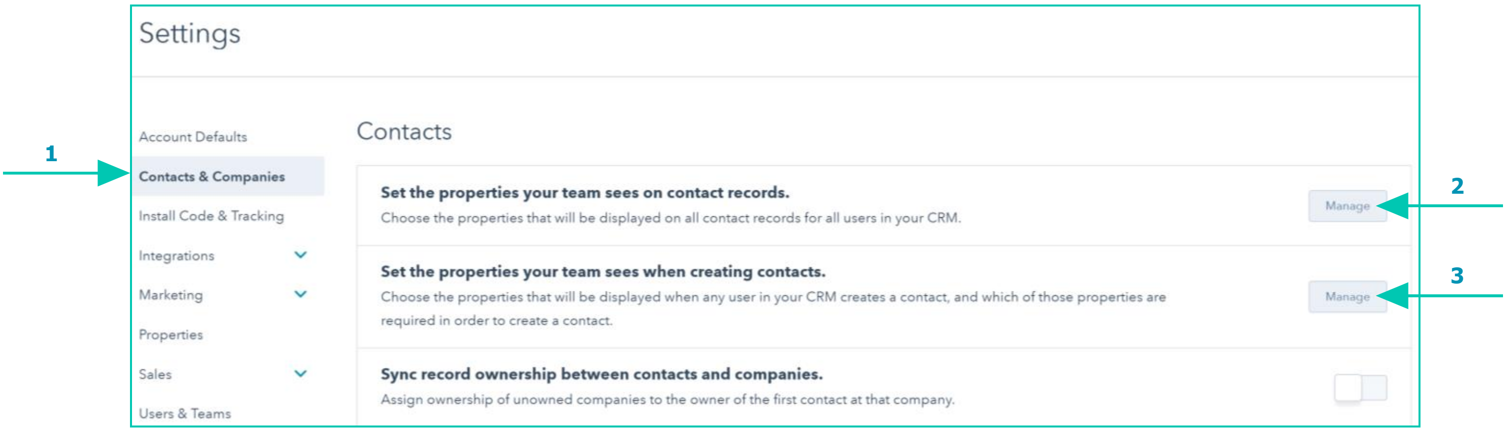
Setting default properties to view on contact record/creating contacts

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.

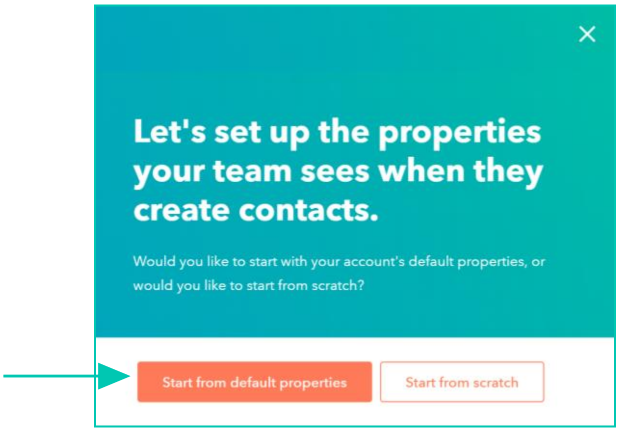
26. Click the dropdown arrow in the top left corner of the HubSpot toolbar and choose **Sales**, then click **Settings**.



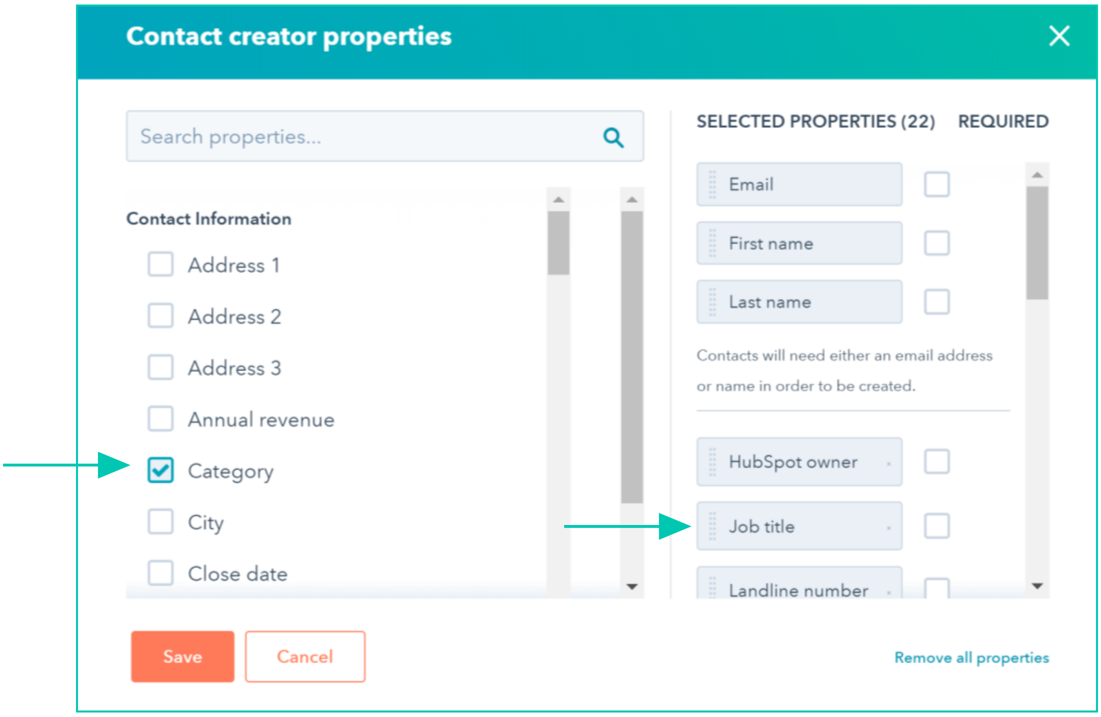
27. In the left sidebar menu, navigate to **Contacts & Companies**[1]. Click **Manage** next to **Set the properties your team sees on contact record**[2]/**Set the properties your team sees when creating contacts**[3].



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



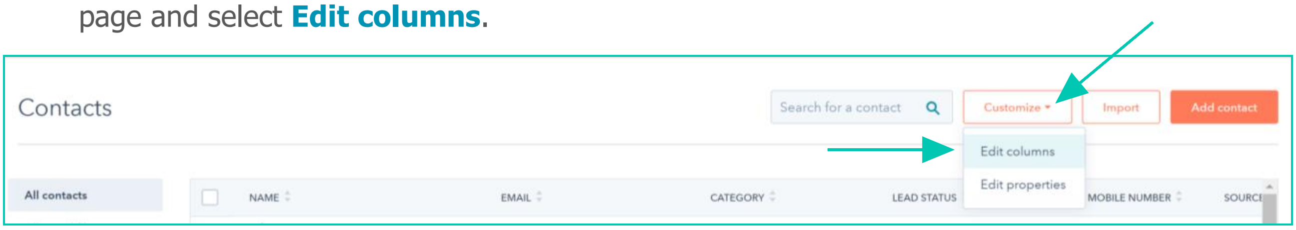
29. If not, in the next dialog box search or browse for properties you'd like to add and check the box next to a property to add it to the **Selected properties** column. Click on the far-left side of a property in the **Selected properties** column and drag to rearrange the properties. Click **Save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



Customising columns viewed in main contacts screen

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

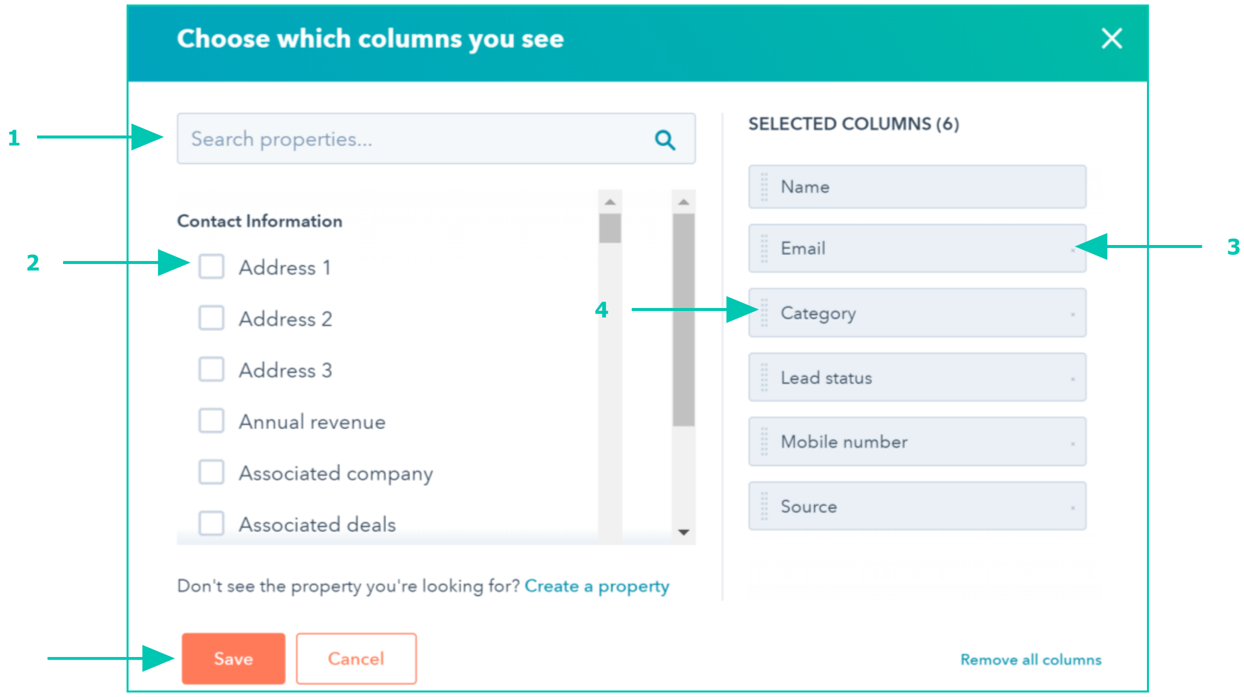
30. Navigate to **Contacts** and click the **Customise** dropdown in the top right corner of the page and select **Edit columns**.



31. Search or browse for the property you'd like to add[1]. 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[2].

32. Click the **X**[3] to the right of any contacts in the **Selected columns** section to remove them from your view or click and drag properties[4] in this section to rearrange the order of columns.

33. When you've finished adding and/or removing properties, click **Save**.

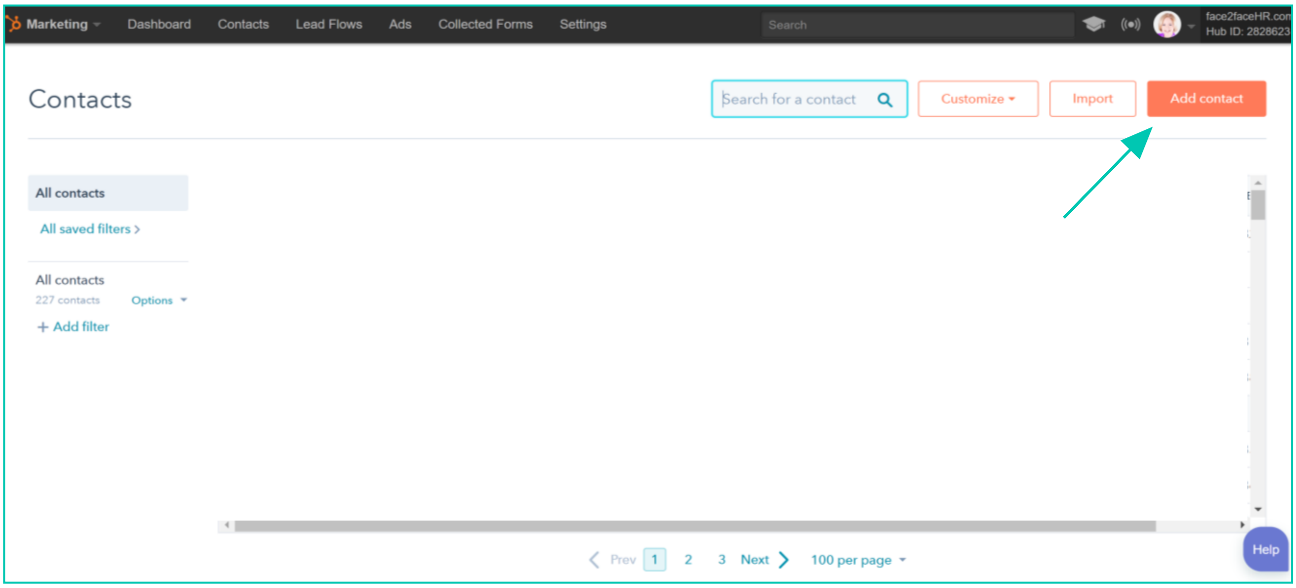


Section 3 - Using the CRM

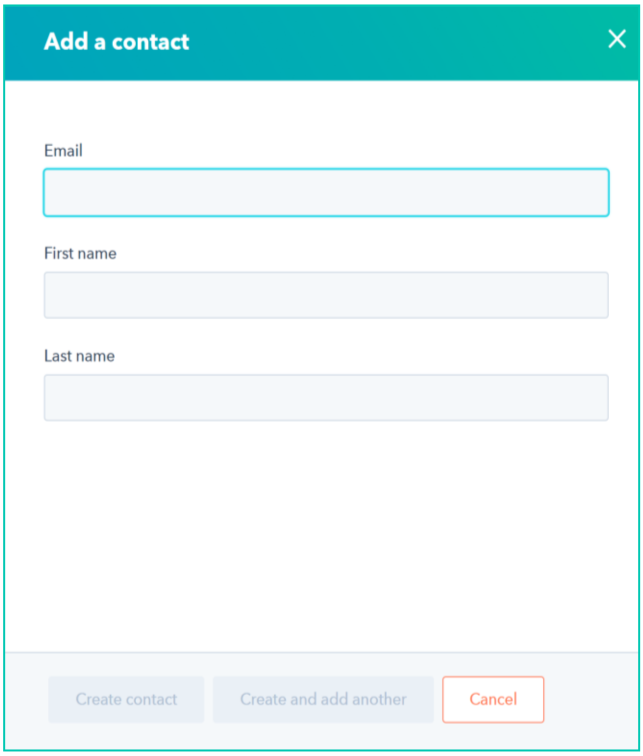
NB all contacts have been removed for data protection reasons.

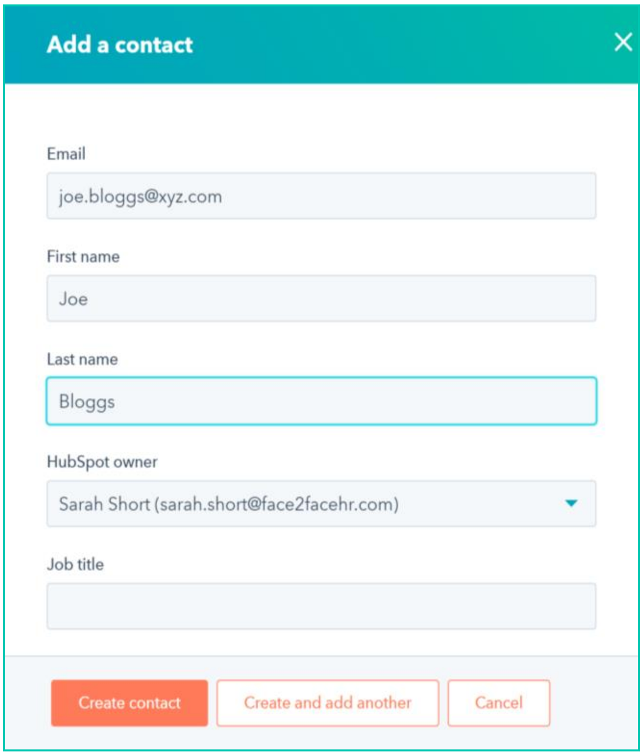
Adding contacts

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

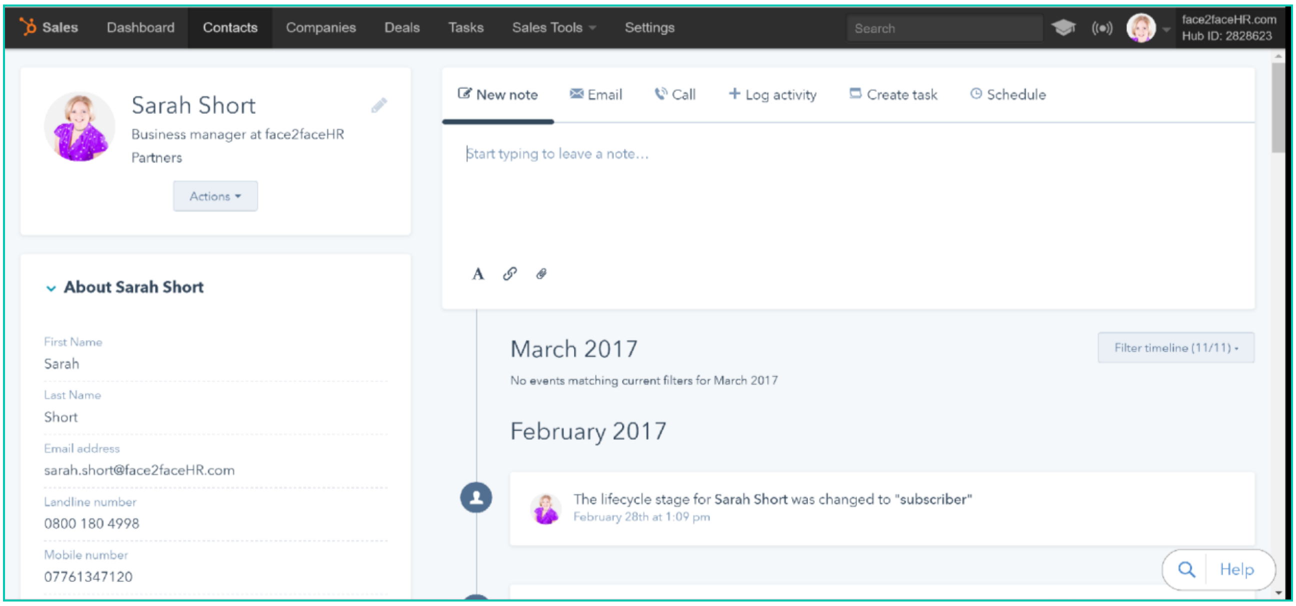


35. **Email, First name** and **Last name** and will appear here by default. Enter information for one of these properties to view the default properties that have been set up for the database. Once information has been entered for the new contact, click **Create contact**.



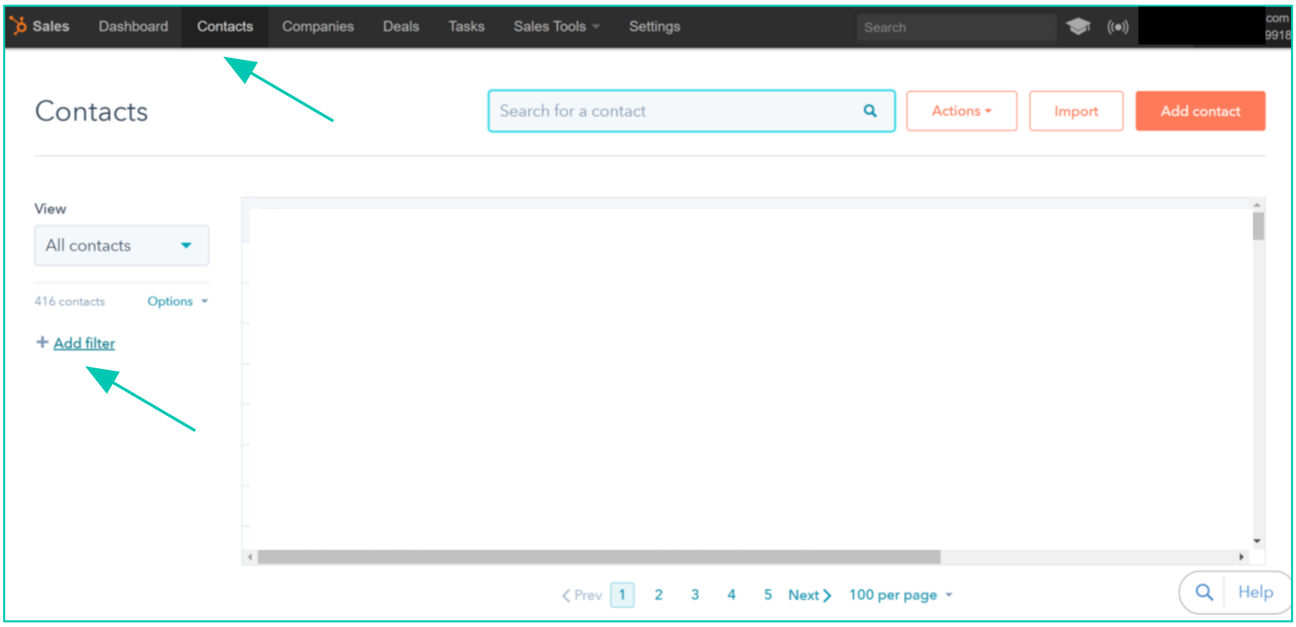


36. Click the contact's name from the contacts dashboard to see the full record.

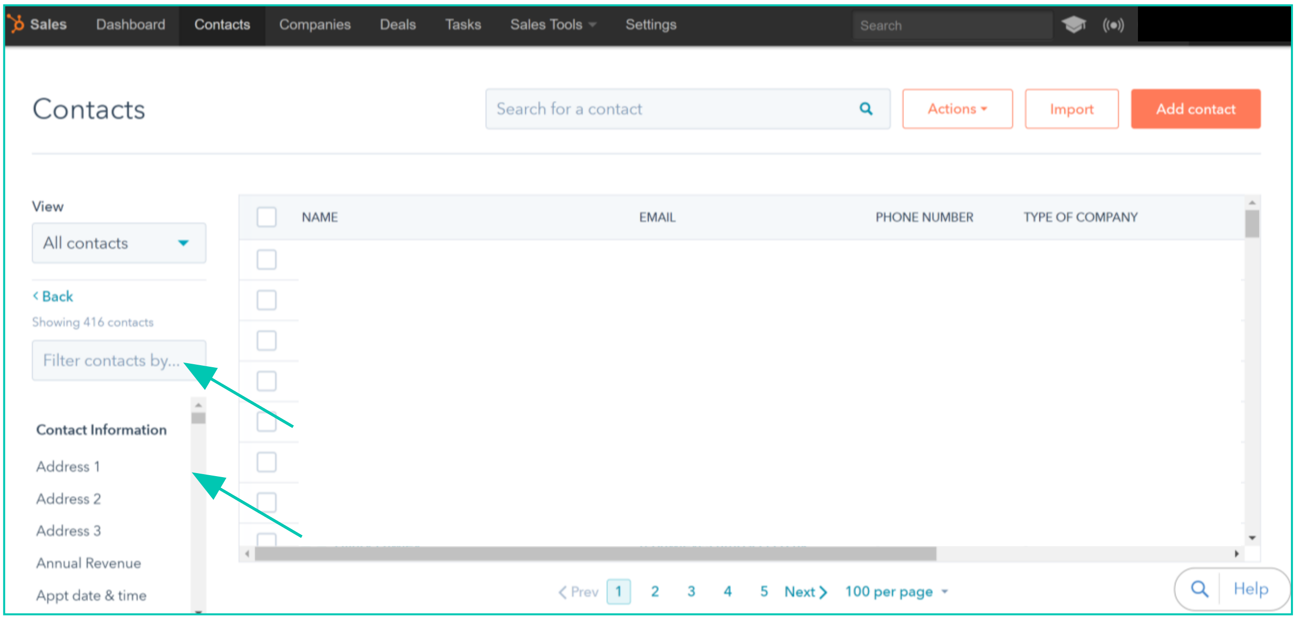


Filtering contacts

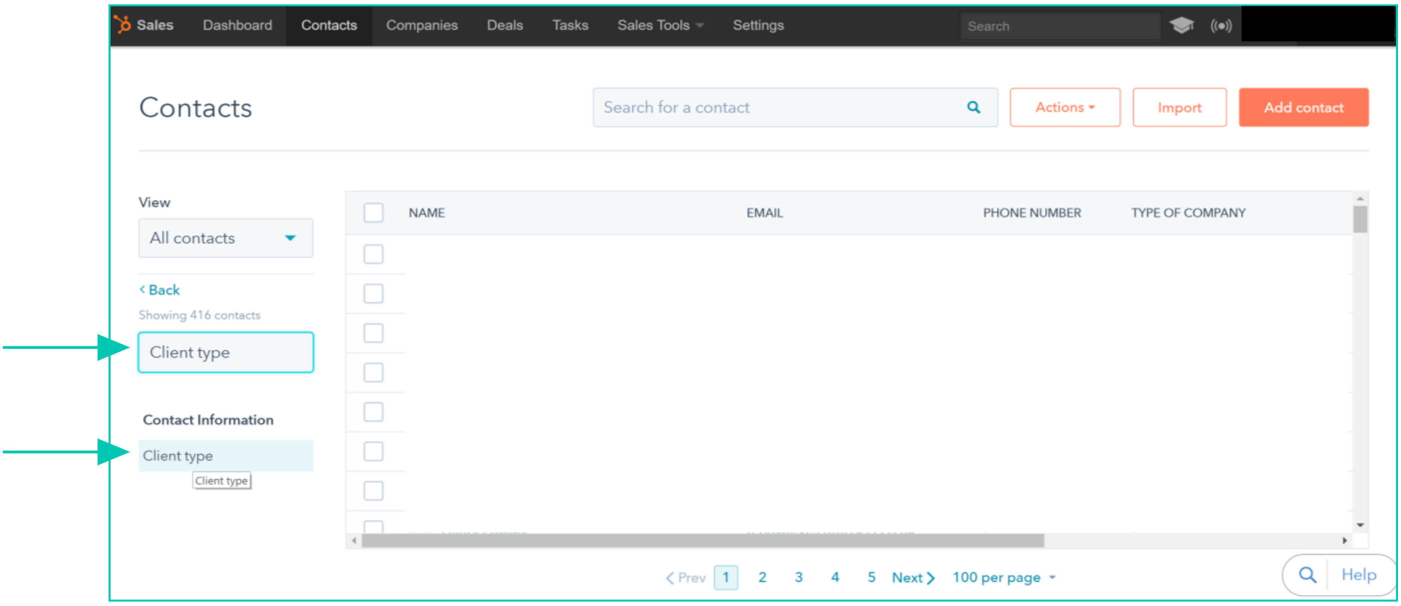
37. In the **Contacts** dashboard click **Add filter** in the left sidebar to create a new custom view.



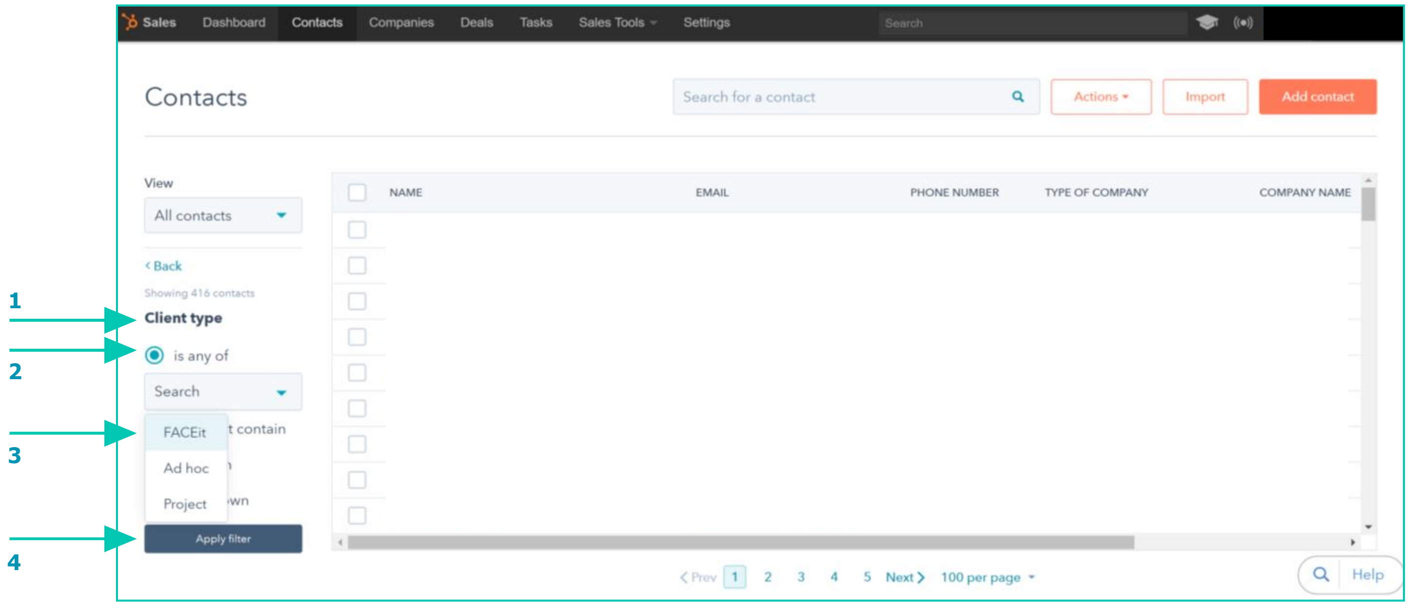
38. To search for the property enter the search criteria in the **Filter contacts by** box or browse by scrolling in the sidebar.



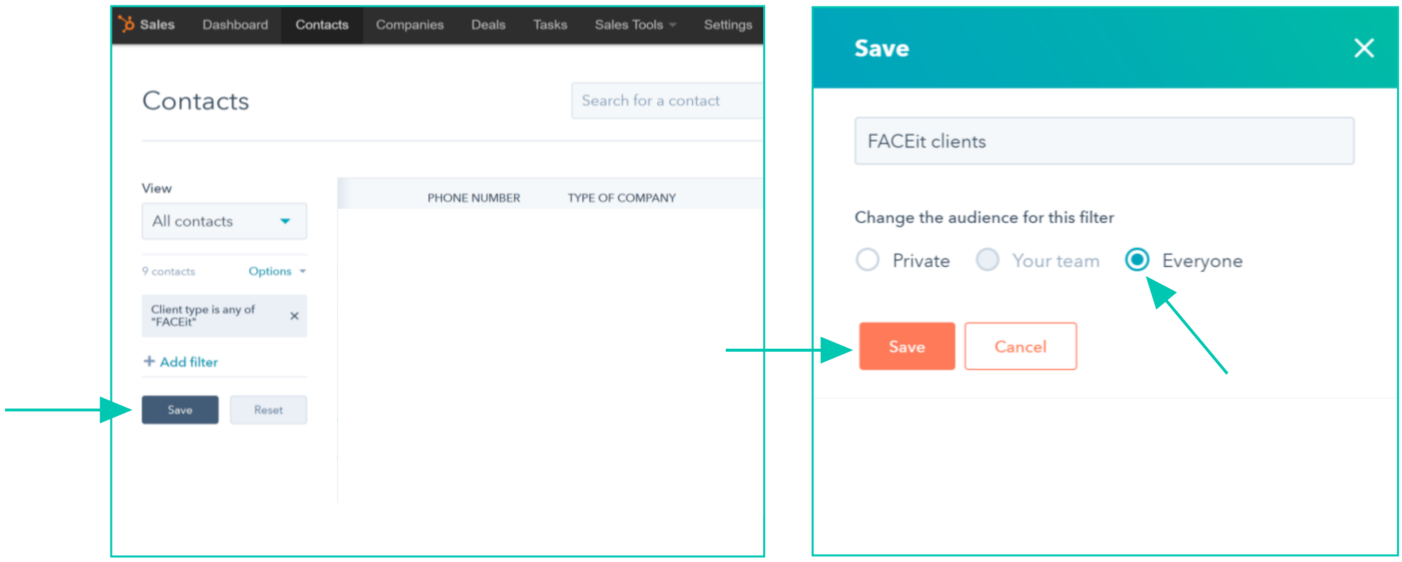
39. For this example, we'll use **Client type**. Once the property has been located, click to set the criteria for that property.



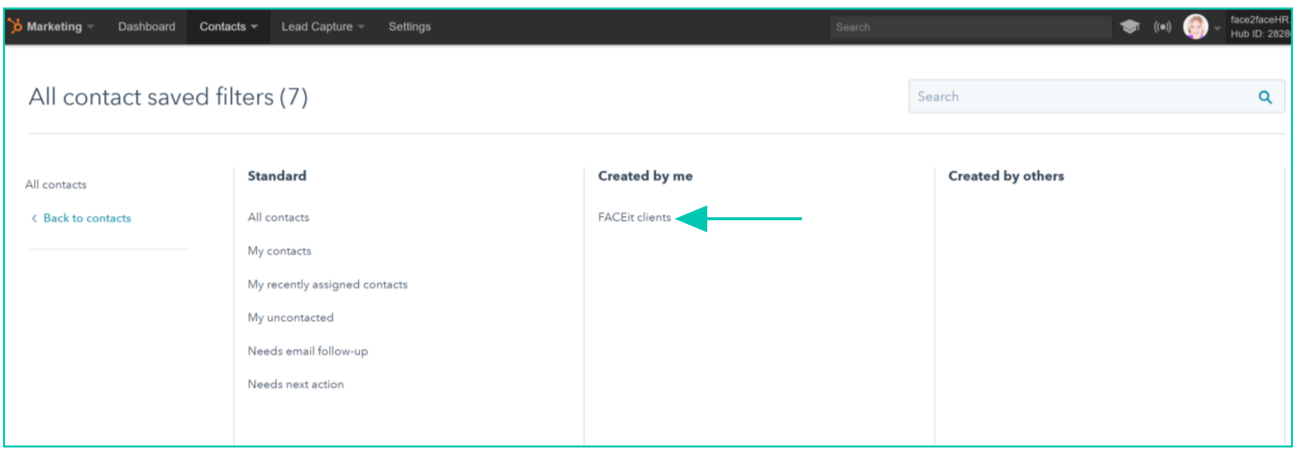
40. Next, we'll be filtering contacts whose **Client type**[1] is **FACEit**; select the **is any of**[2] option, choose **FACEit**[3] from the dropdown, click **Apply filter**[4].



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**.



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



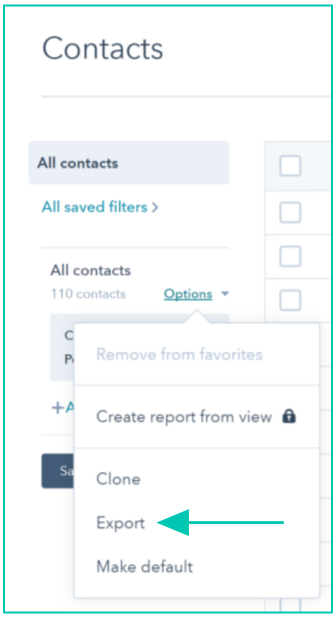
NB: Additional filters can be added using any of the default or custom contact properties created, for example, to find out the renewal dates for all FACEit clients;

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**

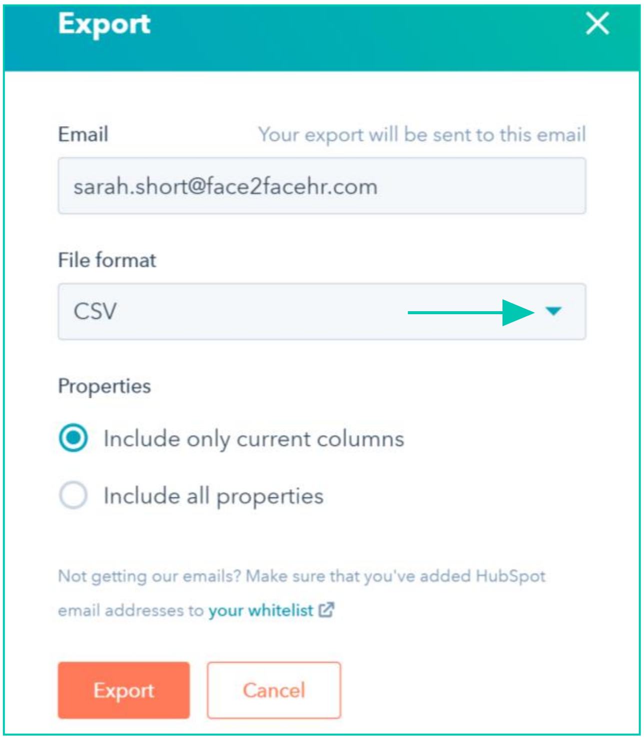
43. Three actions are available as a result of filtering, all of which are found in the **Options** dropdown in the left sidebar:

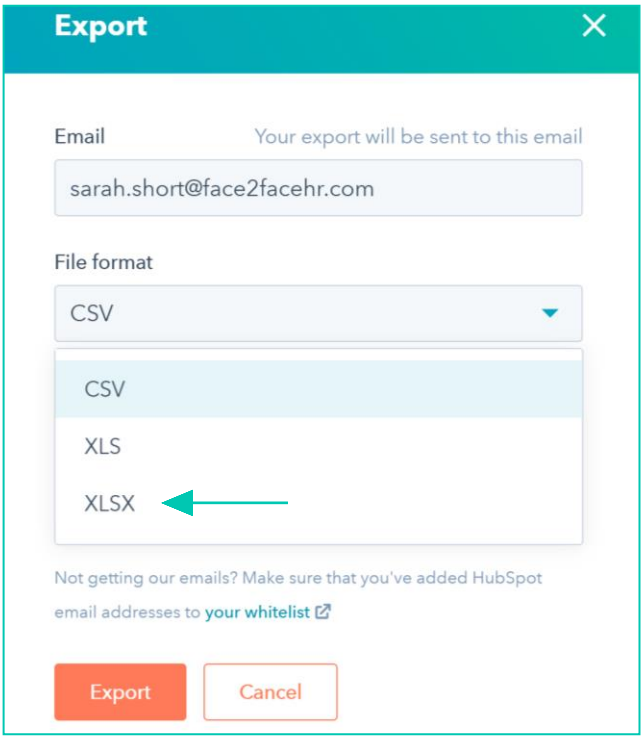
- **Clone:** this will clone the current view so a modified version can be viewed/saved later;
- **Export:** to an Excel file of the contacts in the current view; and
- **Make default:** this will set the current view as the default when viewing contacts.



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**.





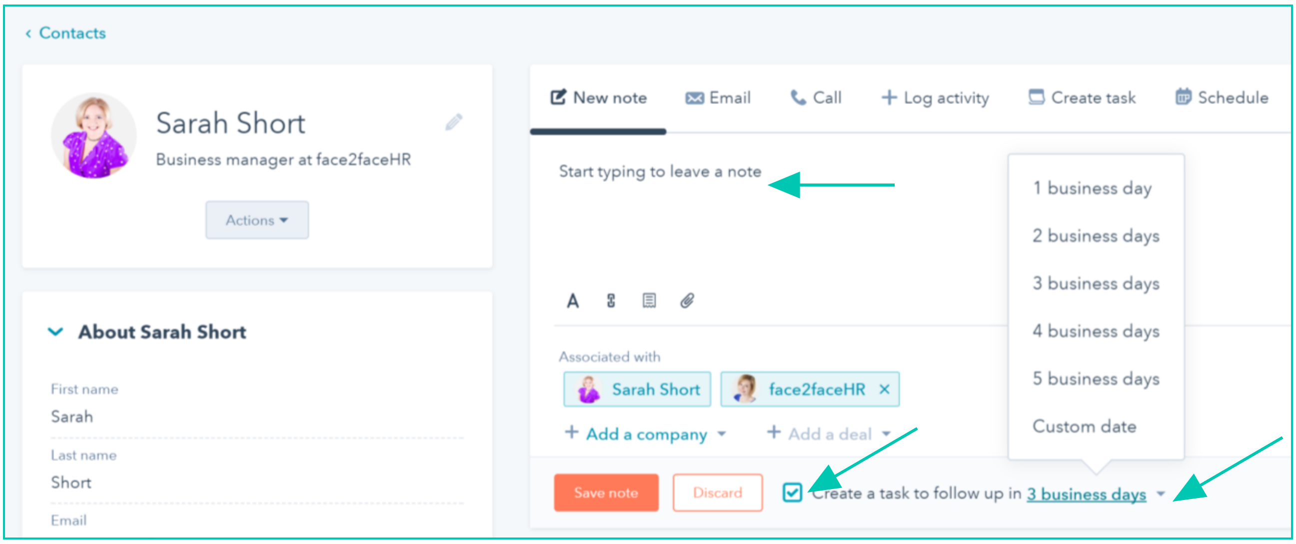
45. An email will be generated advising when the export is ready for download.

Adding notes, activities and tasks

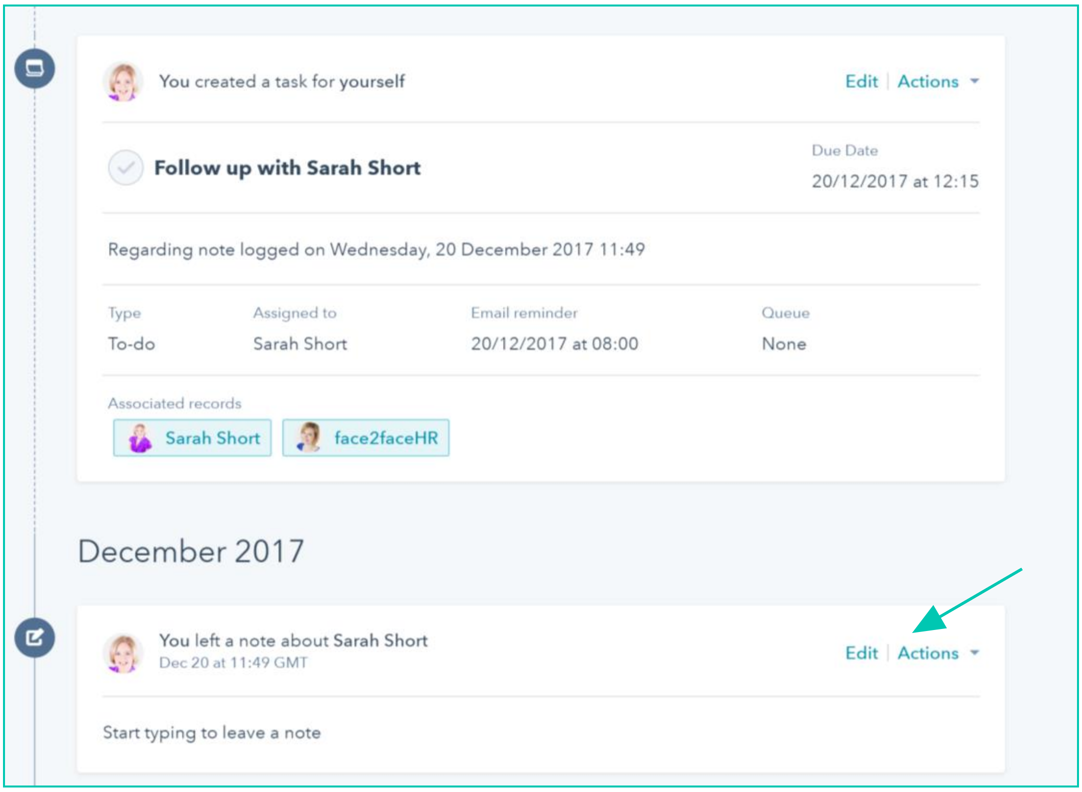
In the box above the timeline in any of your contacts you will see various options where you can add notes, log activities or create tasks specific to that contact. The **Call** option can only be used in the paid version of the CRM and the **Schedule** option currently only works with Google Calendar.

Adding a note

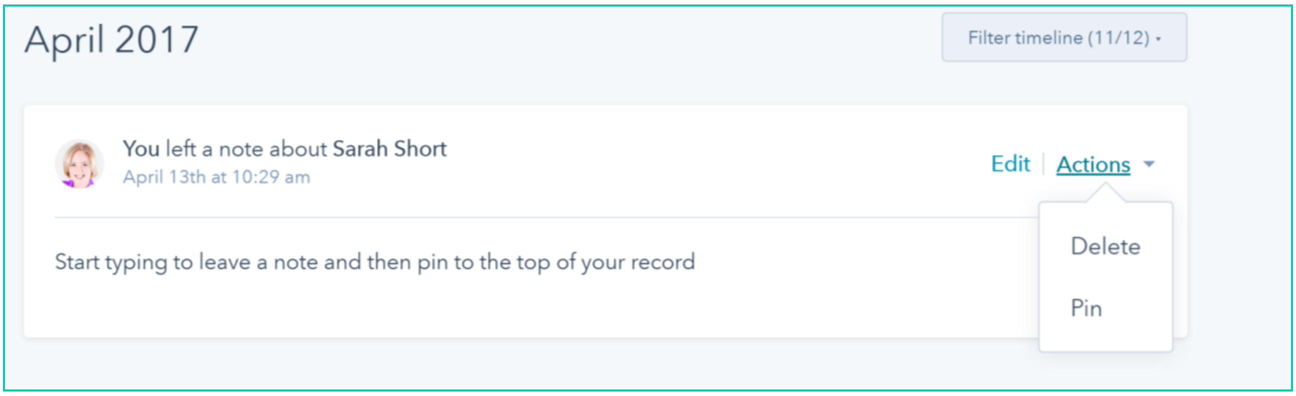
46. Navigate to **Contacts** and locate the contact you want to add a note to and begin typing in the box. You can also create a follow-up task associated with this note; check the box next to **Create a follow-up task** and choose in how many days you want reminding, click **Save note**.



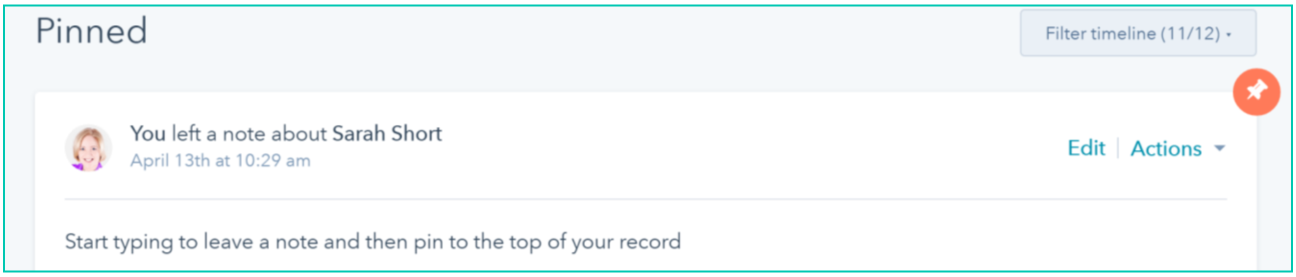
47. In that contacts screen, you will now see the note and task you've added both of which can be edited - we'll look at editing tasks later.



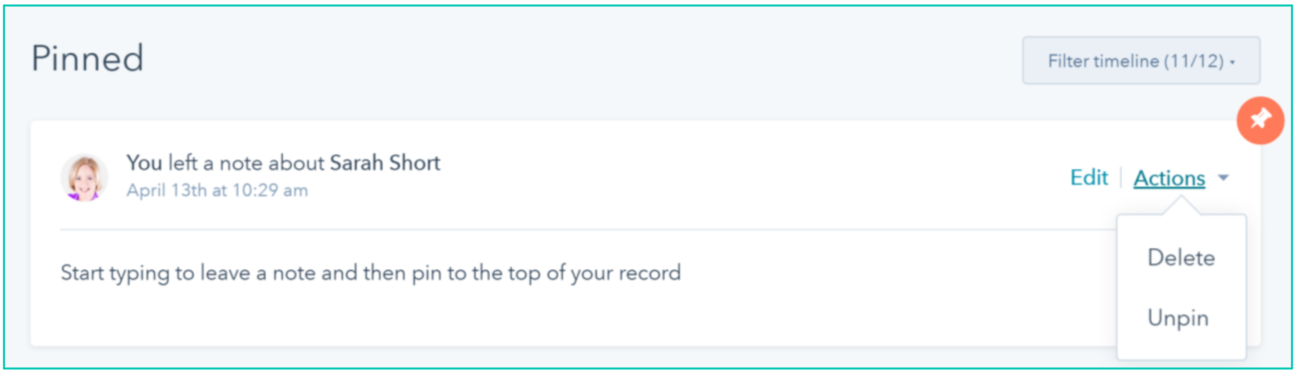
48. You can also pin a specific note to the top of a contact; locate the existing note (or create a new note by typing in the text box etc.), click **Actions** > **Pin**.



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.

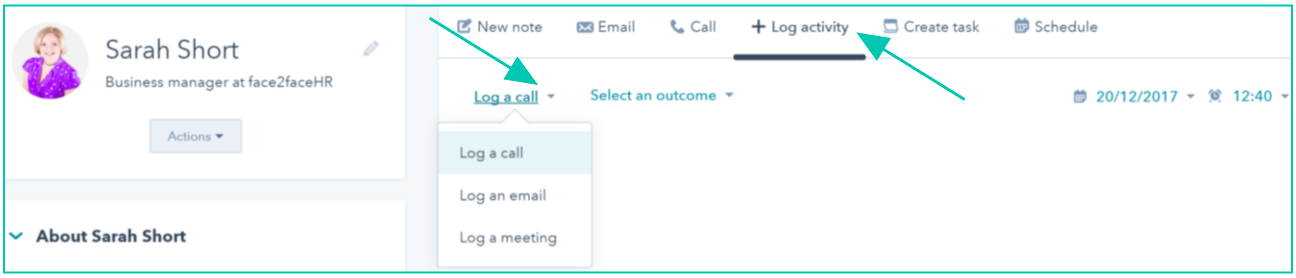


50. If you'd like to pin a different note in the future, you'll first need to unpin the original note by clicking **Actions** > **Unpin**.

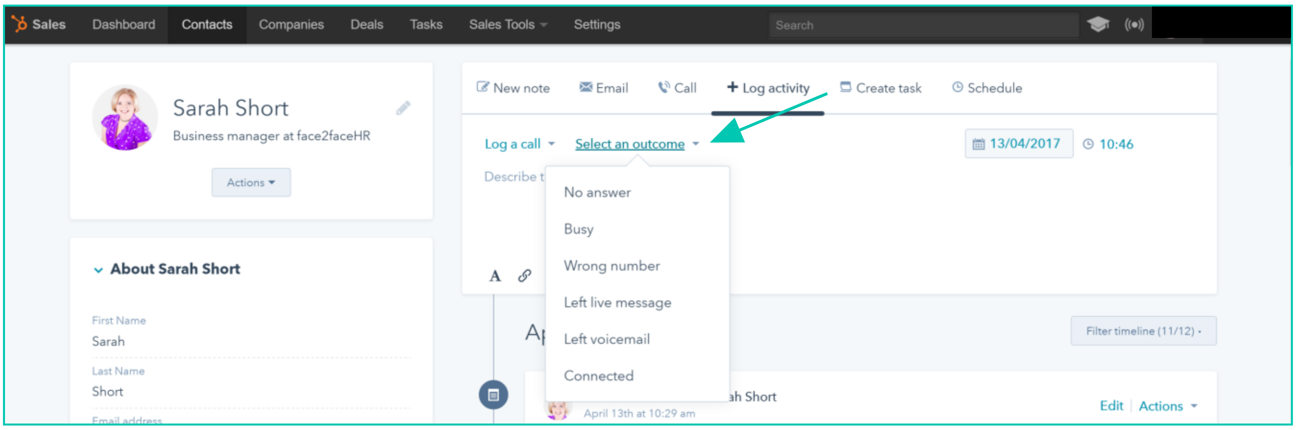


Log an activity

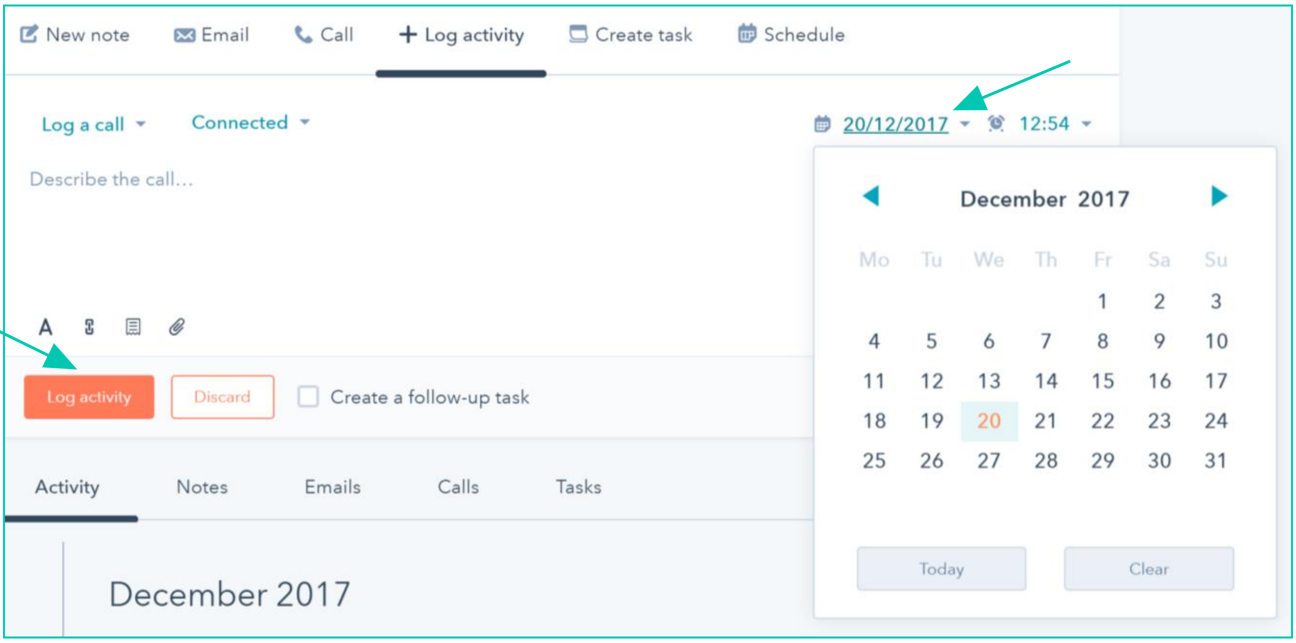
51. Whilst in a specific contact's record, click **+ Log activity**. The box below will allow you to log the activity accordingly. You can choose to **log a call**, **log an email**, or **log a meeting**. Enter text to describe your activity.



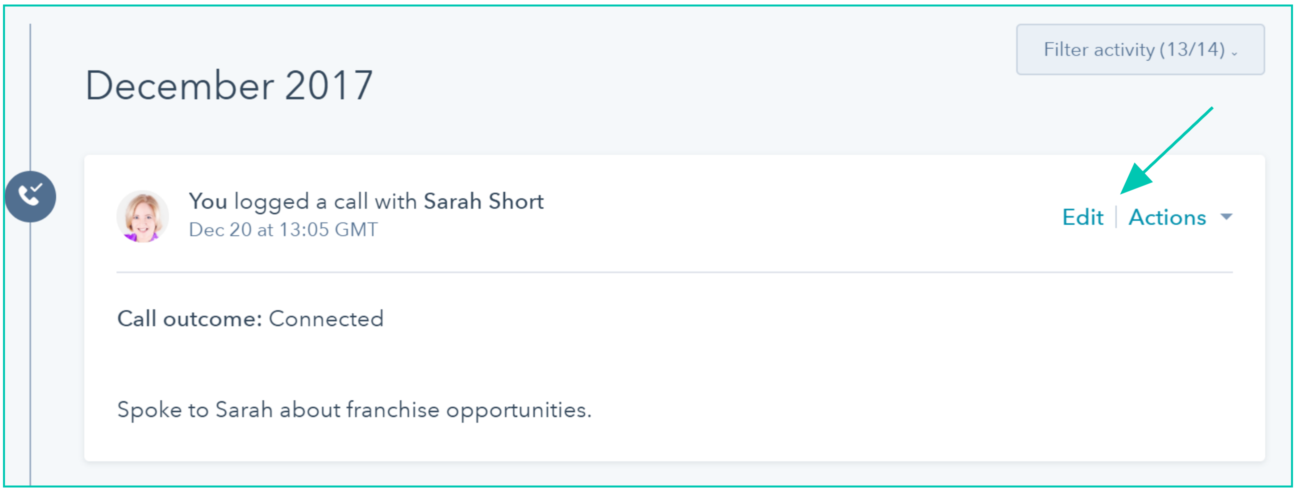
52. When logging a call, you can use the **Select an outcome** dropdown to categorize the call.



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**.

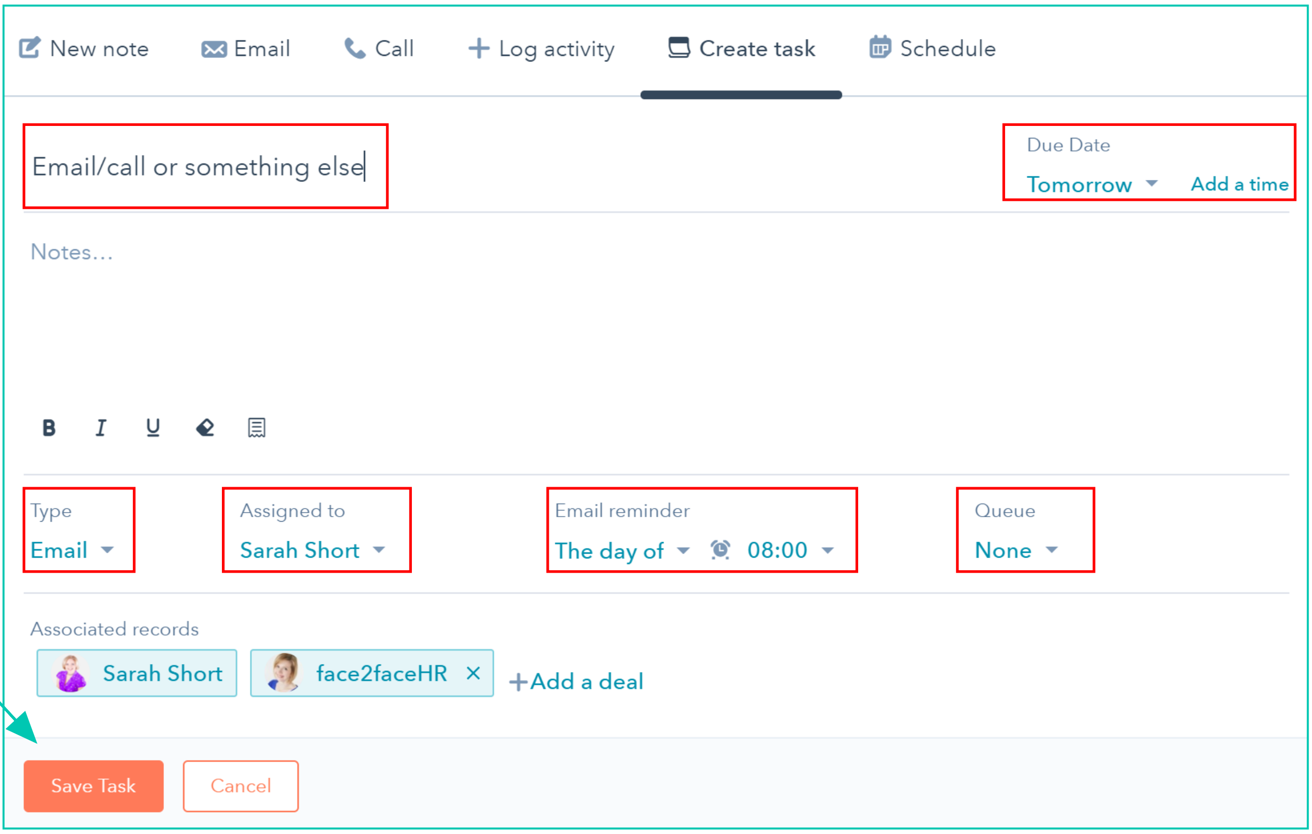


54. Once saved, this logged activity will display in the contact's timeline. To edit or delete a previously logged activity, locate the activity in the timeline and click **Edit** to make changes, or click **Actions** > **Delete** to remove the activity from the timeline.

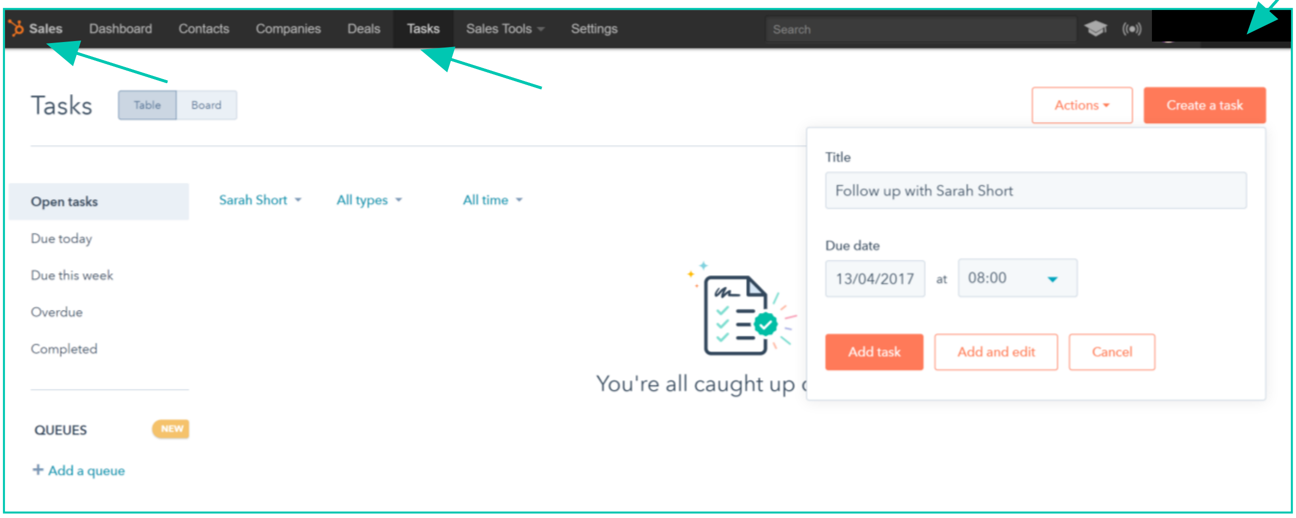


Creating and editing tasks

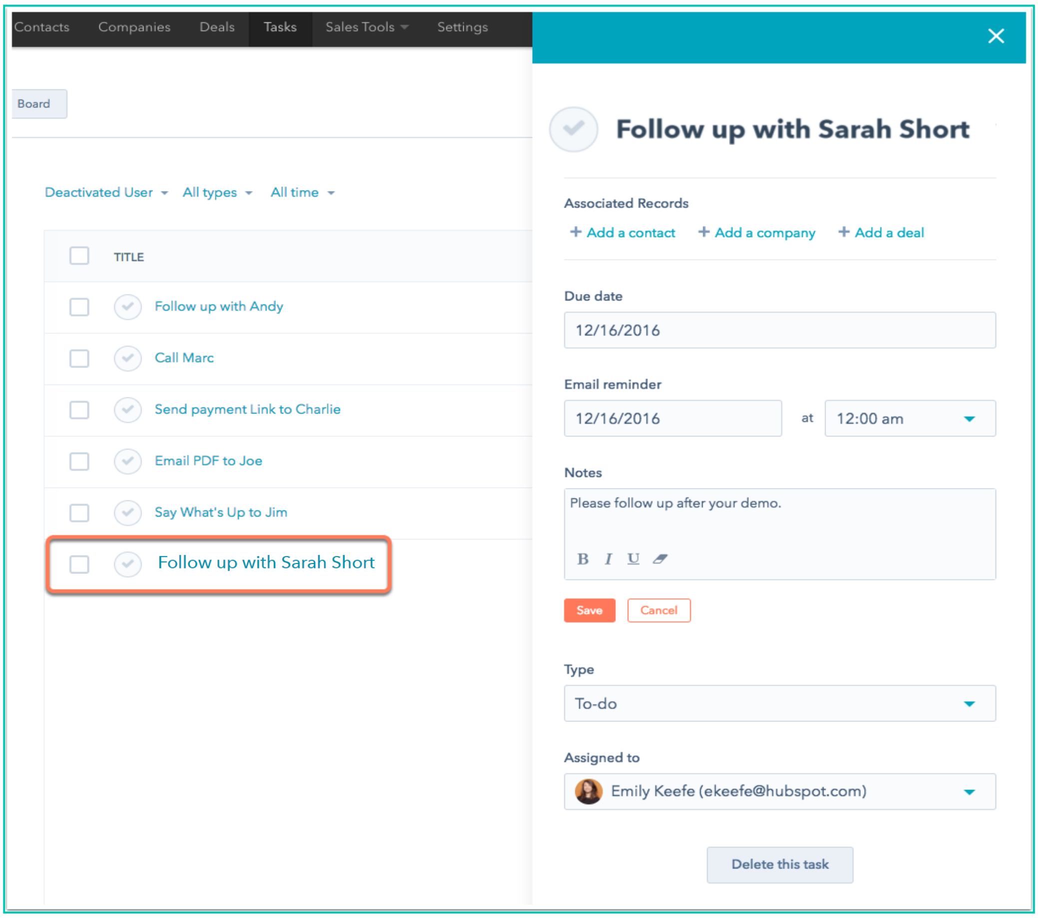
55. Whilst in a specific contact's record, click **Create Task**. Enter the details for your task; you can include "call" or "email" in the title of your task to automatically assign the corresponding task type. Click **Save task**.



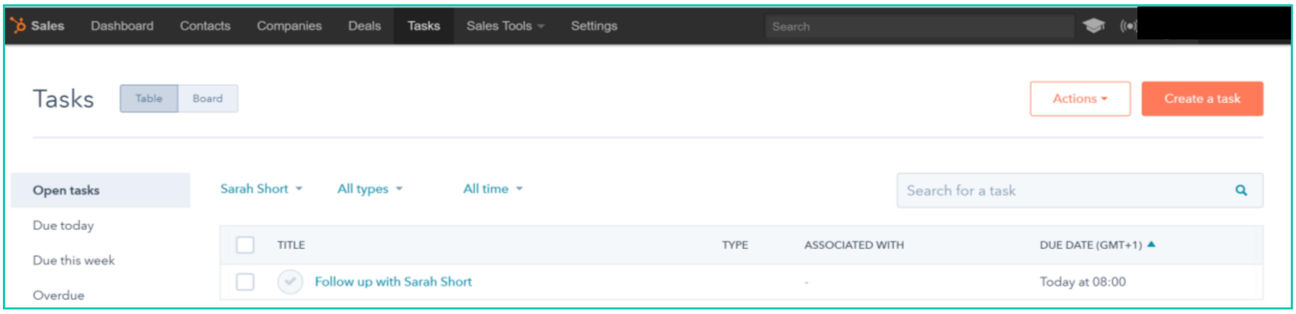
56. You can also create a task from the **Tasks** dashboard and associate it with a contact. In the **Sales** dashboard navigate to **Tasks** in the main navigation bar, click the **Create a task** button, enter a title and adjust due date as needed, click **Add Task** or **Add and edit** which will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



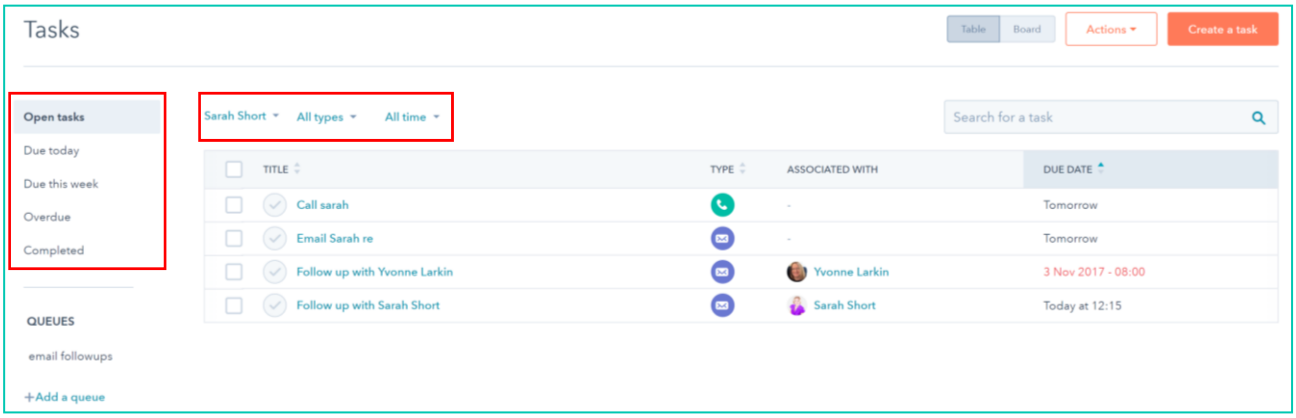
57. In the dialogue box that appears, you can add/edit the following; add a contact or company, set a due date, set an email reminder, add any notes for your task (click **Save** to save any changes you make specific to notes), set your task type, assign your task to someone and close to finish.



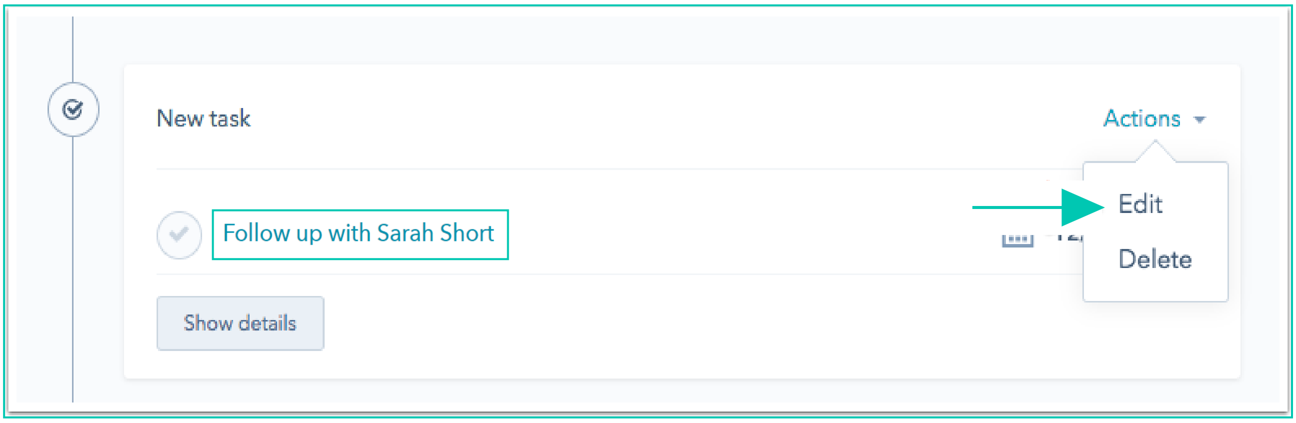
58. You can also edit your task in the dashboard, click on the **task name** to edit and complete as per 57 above.



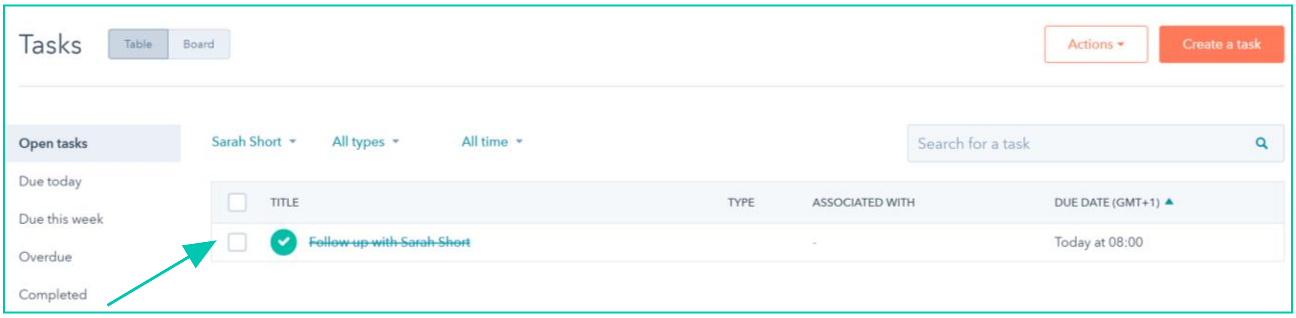
59. You can filter your tasks by owner/user, type or due dates. You can also use the left side menu to quickly go to tasks due today, this week, overdue or those which have been completed.



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.



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

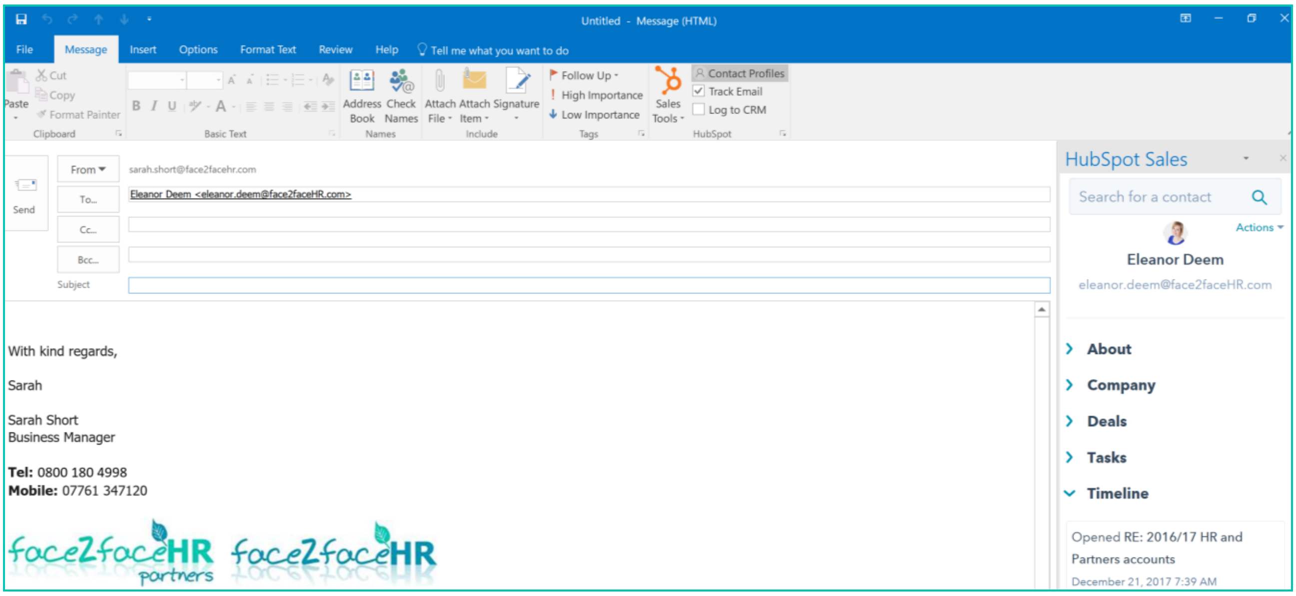


NB: Also in the box above the timeline you will see an **Email** option where you can email your contact from their record, but we recommend emailing directly from **Outlook** and selecting **Track Email** to enable tracking and **Log to CRM** to add the email to that contact's record – see below

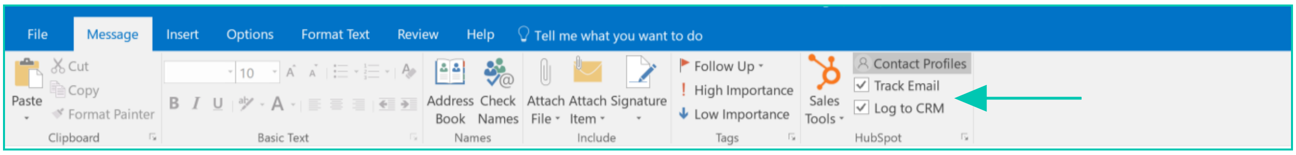
Sending email, log to CRM and creating templates

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.



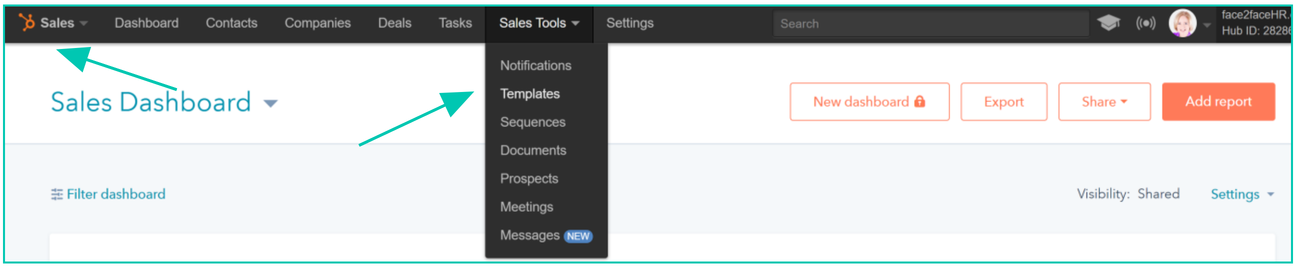
63. Select **Track Email** (to enable tracking) and **Log to CRM** (to add the email to that contact's record in the CRM) then send email as usual.



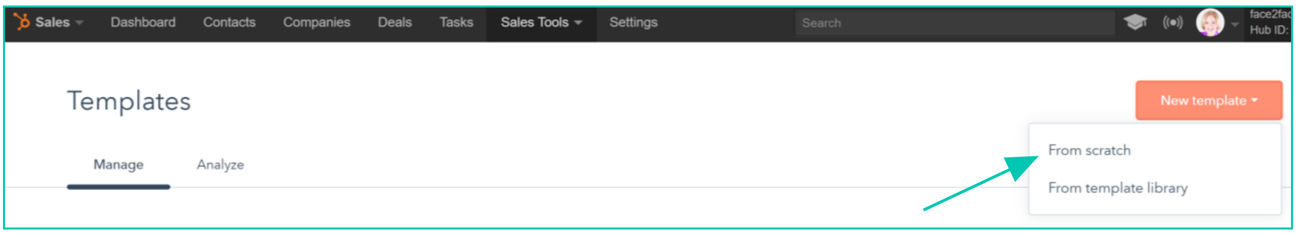
Creating email templates

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

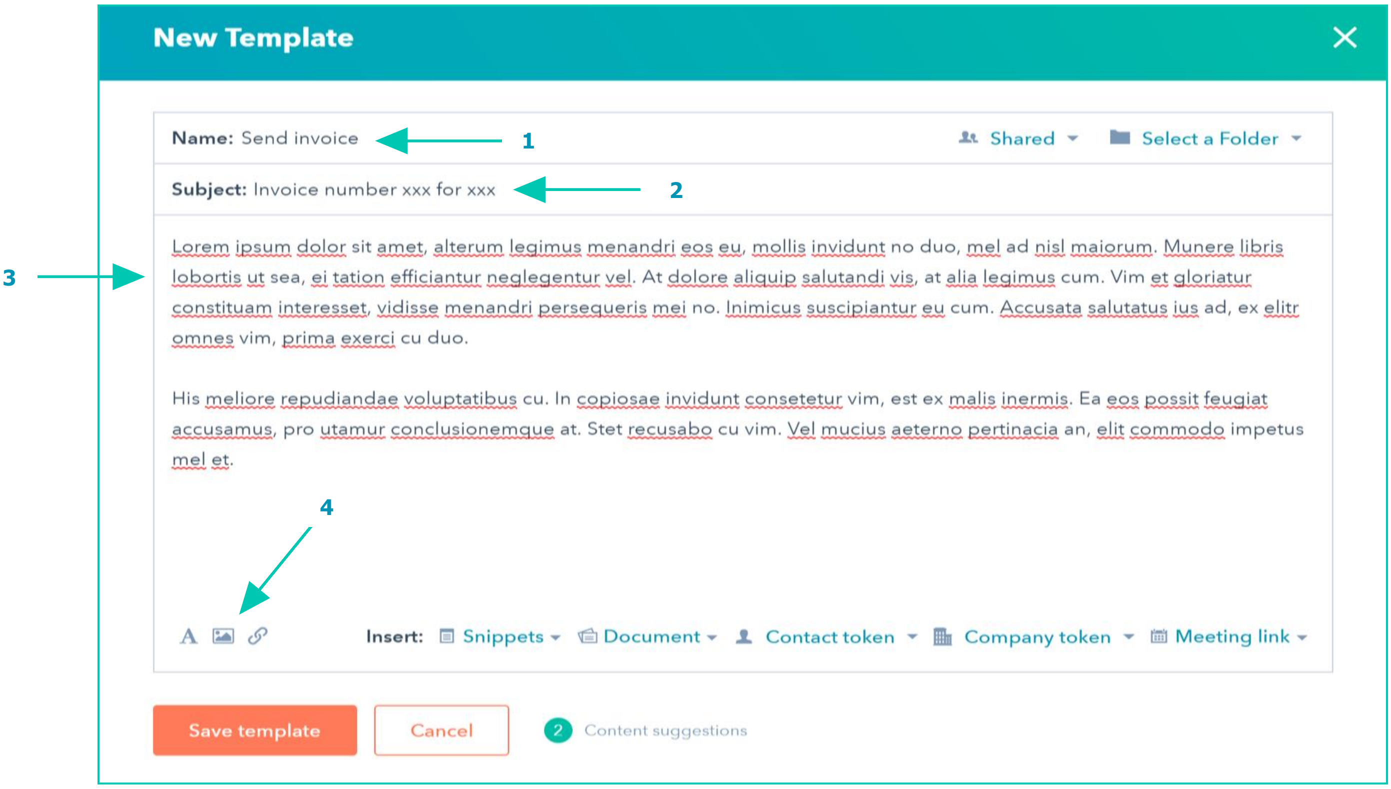
64. Click the dropdown arrow in the top left corner of the HubSpot toolbar and choose **Sales**, then click on the dropdown arrow in **Sales Tools** and choose **Templates**.



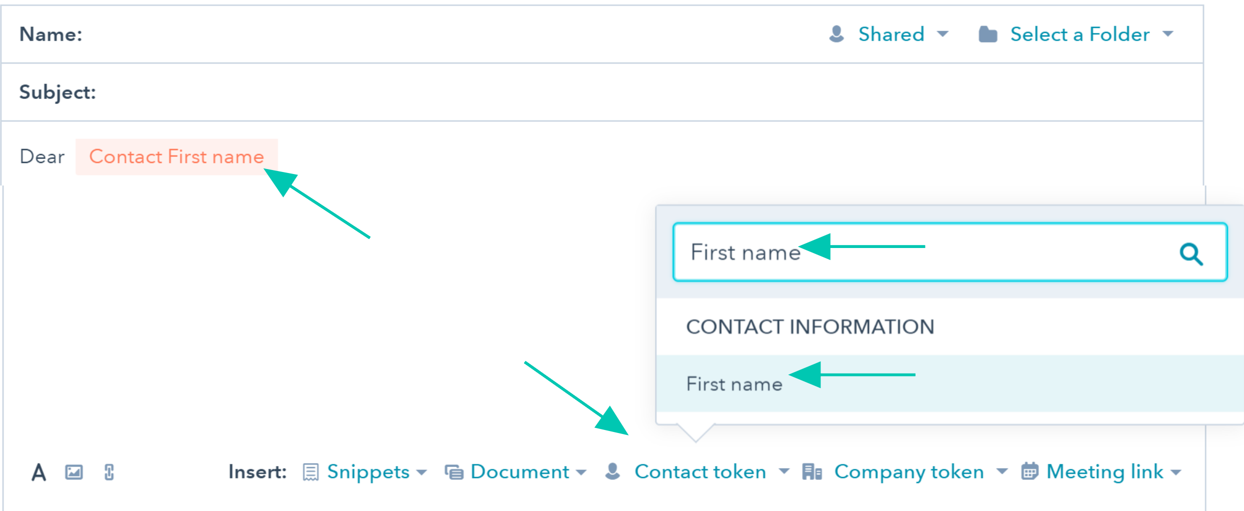
65. Click **New template** and select **From scratch**.



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

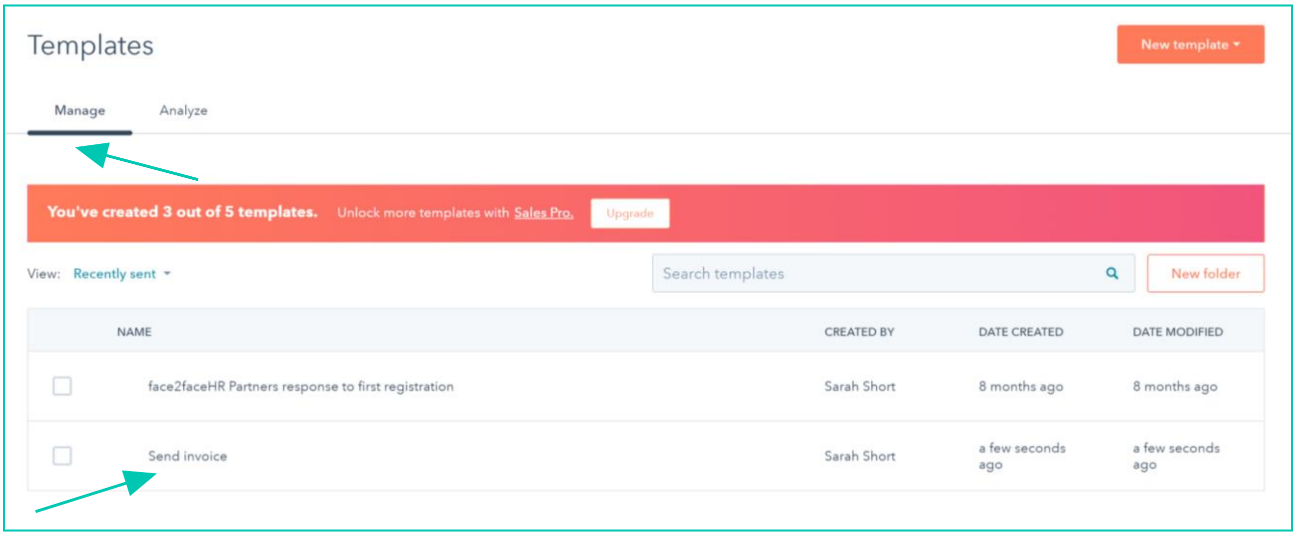


67. To include personalization in the email template i.e. Dear John or Dear Mr Bloggs, click the **Contact token** at the bottom of the screen. Using the search facility, find the property to add, i.e. **First name** and select that property.

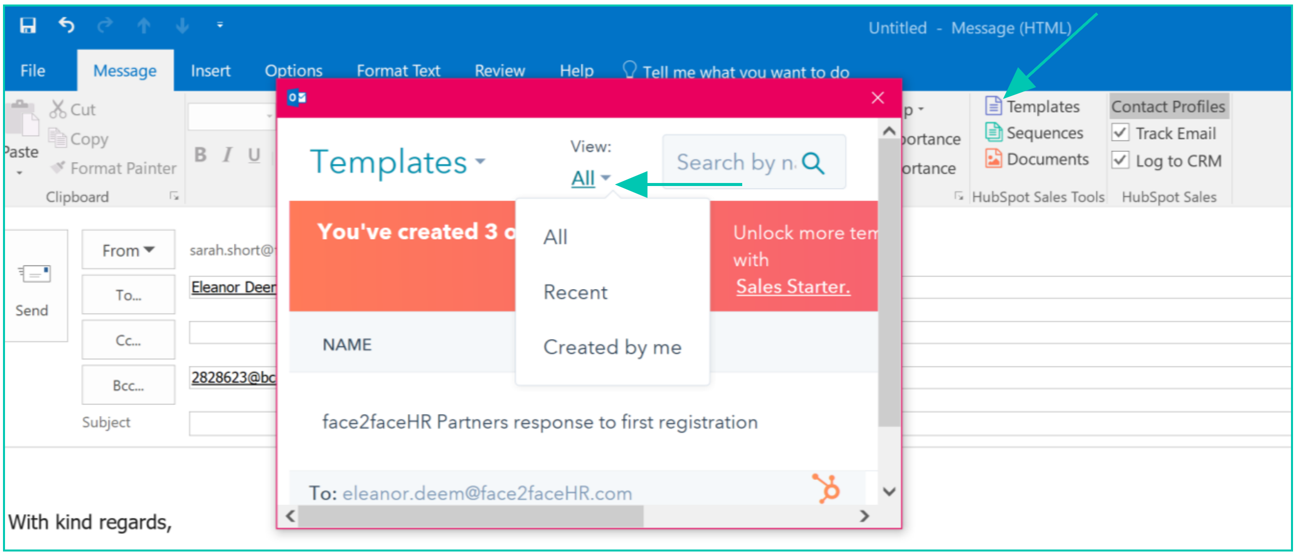


68. When you've finished setting up your template, click **Save template**.

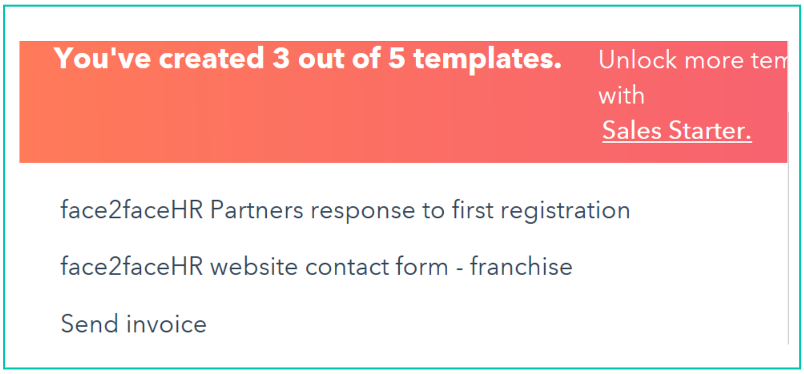
69. You can now view your new template in the current list. To edit simply click on the name and the template will open for editing.



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**.



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

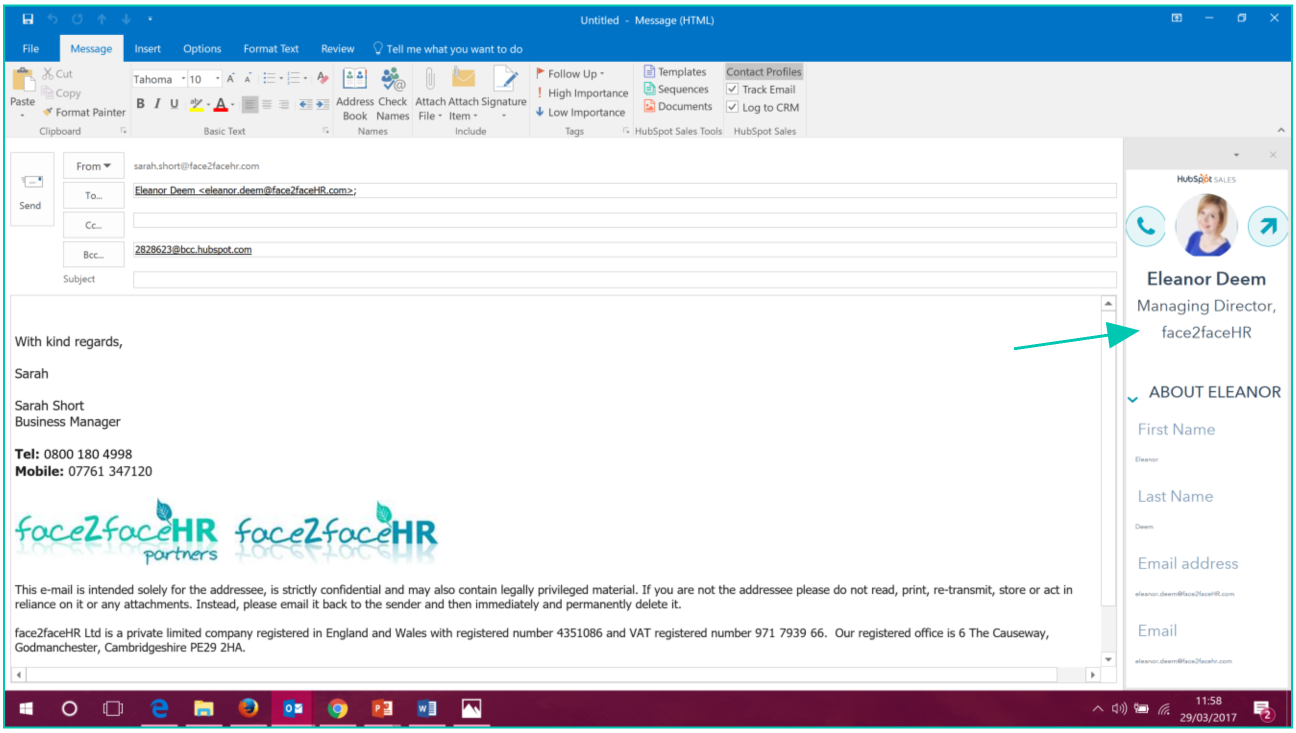


72. The text that you created in the template will appear and all you need to do now is hit **Send**.

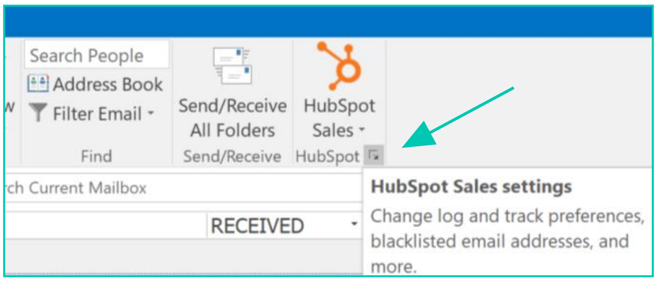
Section 4 - Troubleshooting

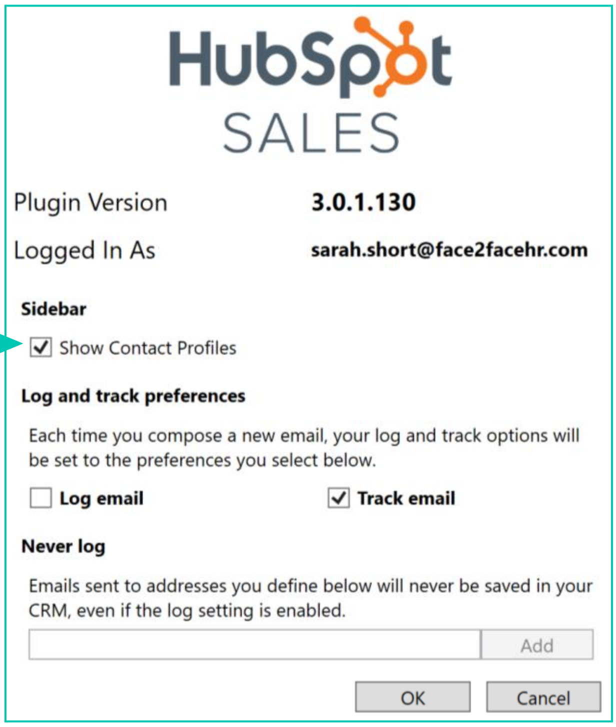
Disabling contact profiles

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.



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**.





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.