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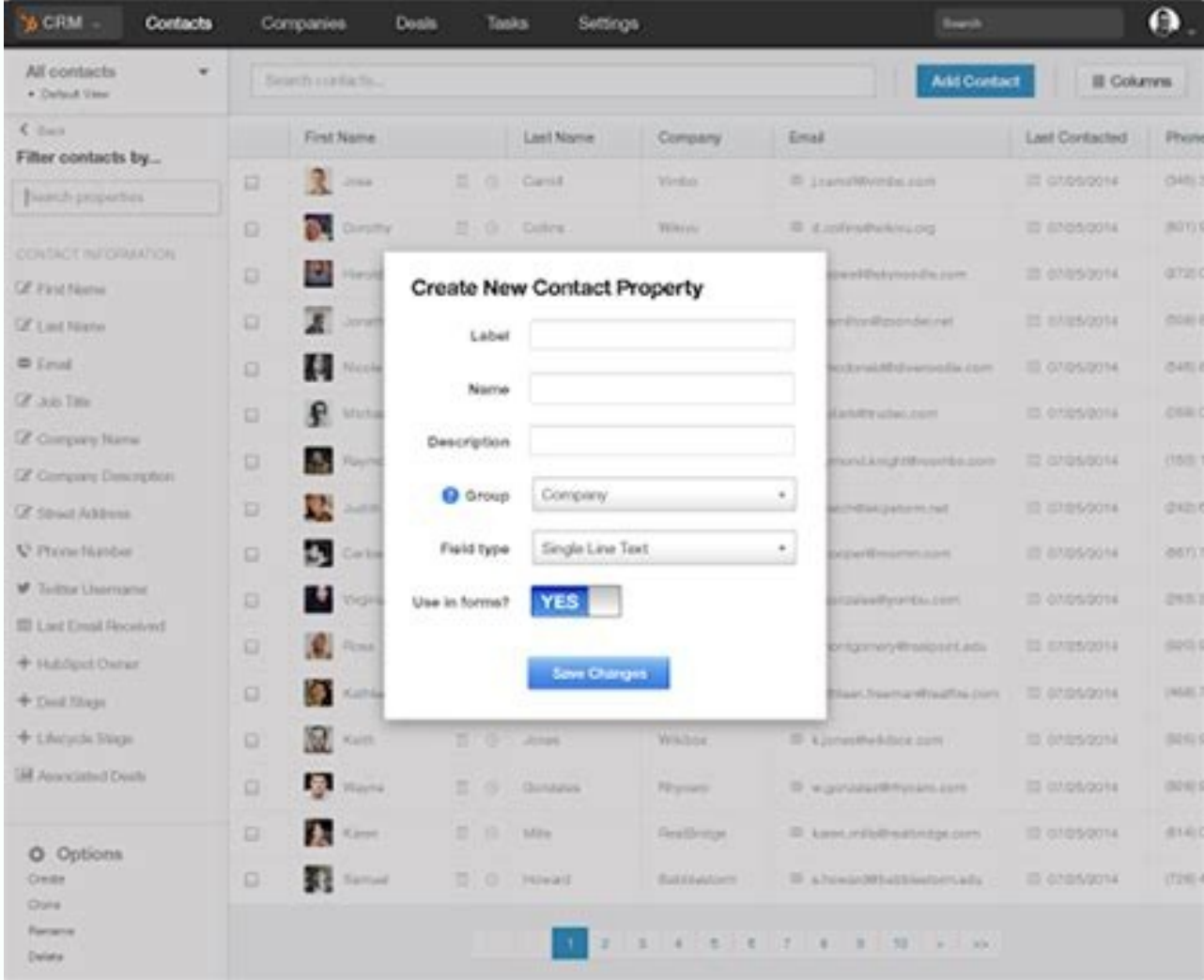

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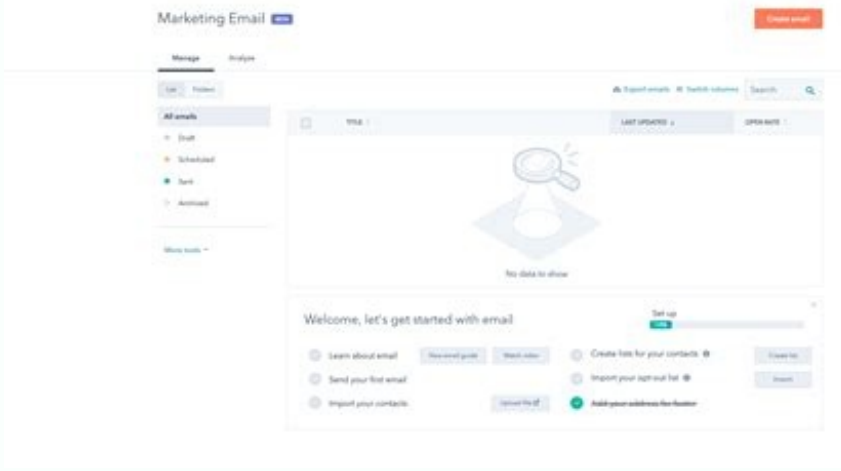
Hubspot crm user guide

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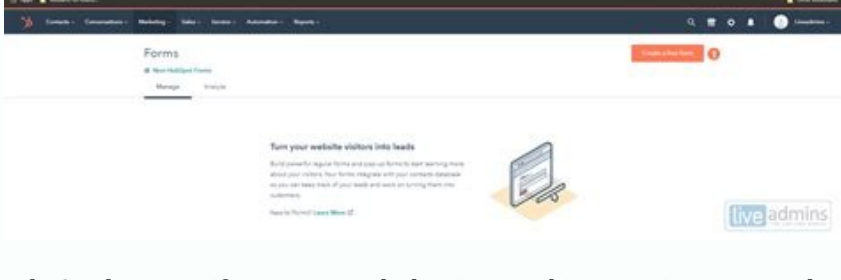
The foundation of your HubSpot account is a database of your business relationships and processes, called the CRM (Customer Relationship Management). Below, learn more about the main components of the CRM, as well as how to get started managing a CRM database in HubSpot. Before getting started, make sure you're logged in to your account. Learn more about logging in to HubSpot. Understand objects, records, and properties The main components of the HubSpot CRM are objects, records, and properties. Objects: represent the different types of relationships and processes your business has. All HubSpot accounts use four standard objects: contacts, companies, deals, and tickets. Depending on your HubSpot subscription, there are other objects, such as calls, conversations, payments, products, quotes, and custom objects. All objects use the same framework, which enables you to segment or report on them. Record: a single instance of an object, where you can store information in properties and track interactions. You can associate records between objects to understand how they are related. Properties: the different fields where you can store information on a record. There are default properties included in your account for each object, but you can also create custom properties based on your business needs. For example, John Doe is a contact record and his email address, johndoe@gmail.com is stored in the Email contact property. His company, Orange Inc., is a company record, which is associated with the John Doe contact record. As John interacts with your sales and support teams, you can create and associate deals and tickets with both John and his company. You can also log any interactions you've had with John, such as emails and calls, on the records. To better understand your existing object relationships and data, you can view an overview of your data model by navigating to Reports > Data Management > Data Model in your HubSpot account. Create and import records Records can be added to HubSpot in multiple ways. You can manually create them or import them in bulk from other systems. When importing, you can import records from a single object (e.g., contacts) or import and associate records from multiple objects (e.g., contacts and companies). You can also use HubSpot data sync to set up a two-way data sync between HubSpot and a variety of other platforms. Manage properties Properties allow you to store all the different types of information you collect about your records in HubSpot. This information allows you to segment, track, and report on your HubSpot database. Each of HubSpot's standard objects has its own set of default properties, which apply to all records within that object. You can also create custom properties to store additional types of information about your records. View and segment records Each object in HubSpot has an index page where you can see all of the records within that object. On each index page, you can filter records based on the information stored in their property values, and save the filters as a view that you can revisit.



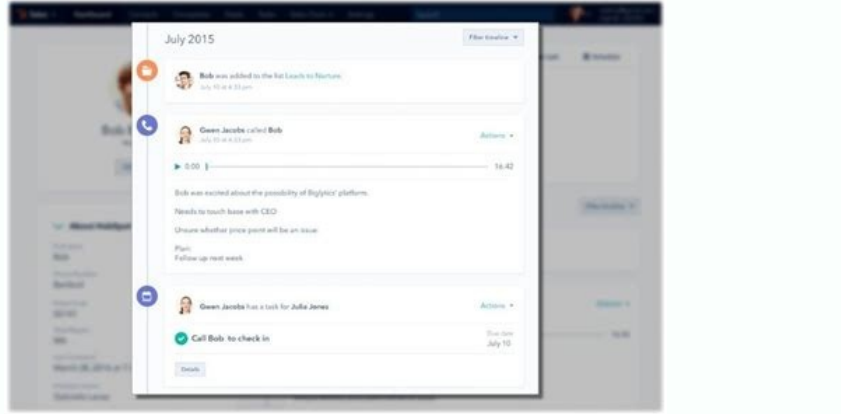
For example, you can filter the contacts index page to show all contacts who have not been contacted in the past 90 days. Using the lists tool, you can filter contacts and companies based on property values as well as additional criteria options. Edit records and log activities For each record, you can view and edit the information stored in each property. Records have sidebars and preview cards that you can customize to choose which properties are shown on a record. You can also view a timeline of all activities, including calls, meetings, emails, tasks, notes, and more. Certain properties and activities in HubSpot are updated and logged automatically, but you can also edit property values and add activities manually. Associate records Associating records allows you to track the relationships between records across different objects. For example, if you have multiple contacts at one company, you can associate all of them to that company. If your account has a Professional or Enterprise subscription, you can also create association labels to define the relationships between your records. Customize records On each record, there are sections that display property information, associated records, and how the record is used in other tools, such as lists or reports. To help your account's users access the most useful information, you can customize which properties, associations, and tools are shown on records for each object. If your account has teams, you can also customize record views for specific teams. Join the HubSpot Community To engage with other users and get more out of your HubSpot tools, join the HubSpot Community. You can see examples from peers, get tips and advice from experts, learn how to troubleshoot common issues, and submit feedback to the Product team. As your business grows, manually keeping track of your prospects and customers with spreadsheets and random notes in different places becomes near impossible. Not only is this type of system time- and energy-consuming to manage, but things also start slipping through the cracks at an alarming rate. This only serves to exhaust your team and disappoint to your customers. You don't want this to happen to you, do you? No. That's why you need a CRM. There are four main advantages of using a CRM. Benefits of CRM 1. Better Customer Experience It's much easier to provide a positive buying experience when you know a lot about your prospect. Seeing at a single glance every blog post, email, and ebook they've opened and/or read, as well as key details like their company's size, location, and vertical, gives you a major leg up. You can personalize your messaging and provide more value from the start. 2. Higher Productivity With a CRM, you can automate tasks like call and activity logging, reporting, deal creation, and more. The less time reps are spending on administrative work, the greater number of hours they have to get in front of prospects. Your revenue will increase proportionally. 3. Increased Collaboration A sales manager can instantly see how and when her salespeople are reaching out to and following up with buyers. An account executive (AE) can quickly fill himself in on an opportunity his sales development rep (SDR) has prospect and qualified for him. Salespeople on the same team can learn more about each other's best practices and pinch-hit for each other whenever someone goes on vacation or gets sick. Essentially, a CRM boosts rep collaboration and efficiency. 4. Greater Insights Stop wondering how your salespeople are doing. A CRM will give you both a high-level and on-the-ground picture of rep performance, including team-wide and individual conversion rates by deal stage, average deal size, deal velocity — and that's just scratching the surface. Imagine what you could do with this data-backed understanding of what's working and what could be improved. CRM Terms to Know Before we dive into the nuts and bolts of using a CRM, you should be familiar with several key terms. Contact A contact is an individual person. Most CRMs will record their first and last name and email address. You can also keep track of details like their job title, company name, annual company revenue — the possibilities are nearly endless. Lead A lead has indicated an interest in your product. They might be a Marketing Qualified Lead (MQL), meaning they've somehow interacted with your marketing content (for instance, downloaded an ebook), or a Sales Qualified Lead (SQL), meaning your reps have identified them as a good fit. Deal Also known as an opportunity, a deal is a potential sale. A deal should move through the various stages of your sales process. Link contacts to deals. If you're working with CMO Jane Doe and Marketing Director John Smith on a single purchase, they should both be associated with that deal record. Company If you're selling to businesses, you also want to keep track of which contacts and deals are linked to which organizations. The typical CRM puts the "company" record at the top of the hierarchy. For example, you might associate 10 different contacts and three different deals to a single company. Source Your leads come from a variety of different sources. That might include trade shows, referrals, forms on your website, webinar attendees, etc. Keeping track of conversions by source and deals won by source lets you hone in on your most effective prospecting channels. Activity Any action by your salespeople or prospects typically falls under the activity umbrella, including calls, emails, voicemails, demos, a new contact record, an updated field, etc. Deal Stage Each step in your sales process should be represented by a deal stage. To give you an idea, your reps probably have an exploratory call with almost 100% of the prospects who buy. So "exploratory call" might be the first deal stage in your CRM. Pipeline Deal stages are organized into pipelines. Every salesperson should have their own pipeline in the CRM so they can track which opportunities are currently in progress.



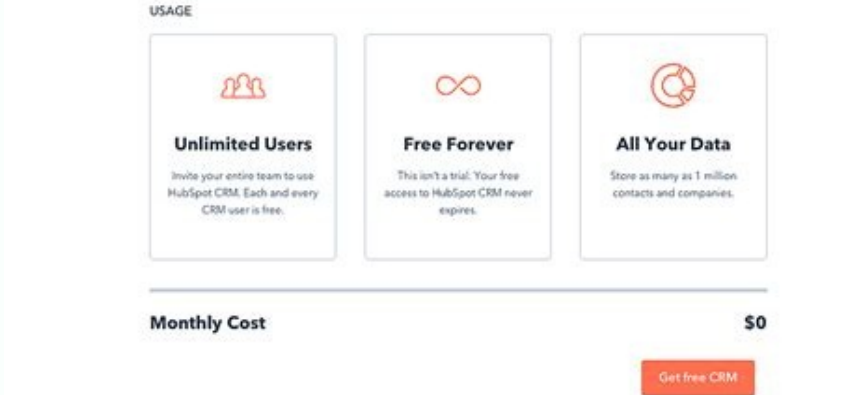
As a deal gets closer to the close, it should move from the left to the right. Essentially, a CRM strategy keeps your organization focused on its goals. As we defined above, there are a lot of valuable tools and features that make up a CRM. But just because they're available doesn't mean they should be put to use just yet. Many businesses stop using a CRM because they get overwhelmed. It's understandable but avoidable — if you create a CRM strategy upfront. First, chat with your team to understand your goals. Sure, you want to better manage your customer relationships, but how?



Why? What specific customer behaviors and interactions mean the most to your business? Jot these down as they will dictate how you'll fashion your CRM settings and reports. Secondly, define your ideal customer(s), perhaps in the form of buyer personas. This information is not only valuable to Marketing and Sales, but it will also understand what types of customers should be added to your CRM down the line — and what types you shouldn't add. Lastly, map your customer journey. How do your customer's typically "meet" your business? On average, how many touchpoints do customers needs before they subscribe to your newsletter, become a customer, and return for more? As your customer base grows and buyer personas split off into more detailed profiles, this customer journey will start to vary. Your CRM can help you keep track of that. Now, let's dig into how to use your CRM. How to Use a CRM Once you've developed your CRM, it's time to put it to work. 1. Add your salespeople. The sooner you can get all the reps on your team using your CRM, the more comprehensive and accurate your data will be. That's why the very first step in a CRM implementation should be adding users. But make sure you've explained the value of a CRM — specifically, how it will help your salespeople bring in more business — and gotten their buy in. If reps aren't sold on the CRM, adoption will be extremely low. (I recommend recruiting one of your top salespeople to act as an advocate. If she's successfully using the CRM, her peers will naturally follow suit.) 2. Customize your settings. Your CRM should reflect your sales process. That means it accurately maps to the stages a customer goes through from "lead," to "opportunity," to "customer." Of course, that requires knowing those stages in the first place. If you have no idea what your sales process looks like, take several weeks to observe and measure the way prospects buy your product or service. What differentiates those who buy from those who opt for a competitor — or make no decision? How long does it take from initial contact with a salesperson to signed agreement, and what are the discrete steps in between? Let's say your sales process is divided into "Connect," "Qualify," "Demo," and "Close." Create deal stages in your CRM pipeline for each one. Now, you've standardized the sales process for your reps. Next, create custom properties for store your data. Your CRM will have default "properties" or fill-in-the-blank details about your prospect. For example, HubSpot CRM comes with fields for phone number, email address, create date (the day they entered your system), city, and so on. Most businesses have unique properties they want to track. To give you an idea, maybe you want to add a field for "Billing ID," "Time zone," "Product purchased," or "Global office address." Create those custom properties now before you import any existing data to your CRM. Finally, if you're using a different currency than your CRM's pre-set currency, adjust that as well. 3. Import your contact, companies, and deals. Chances are, you're currently using a different CRM or spreadsheets to keep track of your prospects and opportunities. Almost every CRM will let you bring in this information by uploading a CSV file. Each column in your spreadsheet should match a contact property in the CRM, so your data will flow seamlessly between your old and new systems. 4. Integrate your other tools. Marketing, sales, and customer success information should be centralized in your CRM. This gives you a 360-view of your prospects and customers and cuts down on manual data entry. Here's an example of an inefficient process using several tools: Collect leads using a form builder → Put those leads into your email tool so Marketing can nurture them → Export qualified leads to your CRM. Imagine this process if you're using the HubSpot CRM with HubSpot Marketing and Sales. Leads who filled out a form, started a conversation with a rep via chat, or performed key actions on your site will be added to your CRM. If they're highly qualified, they can be routed to a salesperson. If the lead needs more time, the marketing team can nurture them with educational content. The entire process is seamless — and far more efficient. Not using HubSpot? I suggest picking tools that already integrate with your CRM of choice (check out your CRM's integration partners) or connecting them using Zapier. For instance, you might set up a Zap so Google Form submissions are automatically transferred to your CRM.



5. Set up your dashboard. You should have a crystal-clear overview of your team's performance so you can keep them aligned and give the right coaching and direction.



That's why a CRM dashboard is so handy: It's like a control panel that you can customize to fit your specific needs. Choose which statistics appear on your dashboard based on your sales objectives and process. For instance, if your team is supposed to sell more of X product this month, you might want to see a breakdown of units of X product sold versus Y product. Or if you set activity metrics for your reps, you may want to have a section for the day's "completed activities." 6. Enable reports. As a sales manager, you're spending a lot of time looking at data. But your reps should be spending as much time as possible selling.

That's why it's a great idea to create daily, weekly, monthly, and/or quarterly email reports. For instance, reps at HubSpot receive a slack ranking each morning via email showing how each member of the team is doing that month: New business, upsell and cross-sell revenue, and net revenue. This daily digest encourages friendly competition and gives salespeople an incentive to keep working even after they've hit quota. Consider sending out an email for activities added and/or completed by rep, emails sent and/or received by rep, calls made by rep, deals won by rep (displayed by count or value), and/or retention rate by rep. Your CRM Is the Key This guide is only scratching the surface of what you can accomplish with a CRM. And the sooner you get started, the better — it's really never too early to use a CRM. Editor's note: This post was originally published in September 2017 and has been updated for comprehensiveness. HubSpot users with Add & edit users permissions can customize permissions for new and existing users in their HubSpot account. If the user is customizing permissions for a user with a paid seat, they must also have Modify billing permissions. You can also limit edit access to properties and assign content access for specific users. Learn how to access the Users & Teams settings to update user permissions. Please note: Users will need to log out of the account and back in before updates to their permissions will take effect. When HubSpot adds new permissions to a permission set, existing users will retain the access they have and any new permissions added to the set will be turned on by default for the user. CRM On the CRM tab, set permissions for CRM objects and tools. To manage user permissions for your conversations inbox, review the documentation on how to create a conversations inbox. Object Access Customize which objects or activities the user can view, edit, or delete. Depending on the object, you can select from the following permissions: View: click the dropdown menu to control the set of contacts, companies, deals, tickets, tasks, notes, invoices, and individual custom objects the user can view. Users with View: Owned only permissions will only see their assigned records on index pages, in the lists tool, and in reports. The options are Everything, Team only, and Owned only. When selecting Team only or Owned only, select the Unassigned checkbox to allow the user to view unassigned records or activities. Please note: to view attachments in records created by other users, a user's Notes permission must be set to Everything. If you selected the Unassigned checkbox for the Notes permission, this allows you to see unassigned notes created via integrations. Notes can't be unassigned in HubSpot since they only have creators, not owners. Edit: click the dropdown menu to control the set of contacts, companies, deals, tickets, tasks, invoices, and individual custom objects the user can edit, merge, and import. The options are Everything, Team only, Owned only, and None. When selecting Team only or Owned only, select the Unassigned checkbox to allow the user to edit unassigned records or activities. Delete: click the dropdown menu to control the set of contacts, companies, deals, tickets, and individual custom objects the user can delete. The options are Everything, Team only, Owned only, and None. When selecting Team only or Owned only, select the Unassigned checkbox to allow the user to delete unassigned records or activities. Please note: Users with View permissions can still create notes or tasks on records of that object. Users must have Communicate permissions to edit notes or tasks on those records, associate notes with other records, or create other activities, such as emails, calls, and meetings. Ownership permissions are based on the default owner properties and the Custom views switch on to let users create, edit, and delete custom views in the inbox. Marketing On the Marketing tab, set permissions for marketing publishing tools. View permissions allow a user to view assets. Edit permissions allow a user to edit assets. Publish permissions allow a user to publish changes to assets. Forms: toggle the Forms switch on to let the user access the forms tool. Please note: to create and connect a support form to a channel, a user needs Account Access permission. To edit a form's follow-up email a user needs Marketing Email Publish permission. Lists: select the checkboxes to give the user access to the lists tool. Files: toggle the Files switch on to let the user add, edit, and delete files from within HubSpot. In HubSpot's free tools, this permission allows the user to upload files such as attachments on records. For Starter, Professional, and Enterprise accounts, this lets users take action on files within the file manager. Users without this permission can still view files in the file manager. Marketing Access: toggle the Marketing Access switch on to let the user access marketing tools, such as the email tool or opting contacts out of marketing emails. This also lets the user access Website activity on contact records. With the switch on, you can turn on more specific marketing tool permissions. Marketing tools Social publishing: click the dropdown menu to control the social accounts the user can publish to. Users with All accounts, Their accounts only, or Draft only social permissions can see all shared social accounts in social monitoring, publishing, and reports, as well as any social accounts they connected. All accounts: the user can publish to social accounts they connected, or to any shared social accounts. The user can also configure social settings. Their accounts only: the user can only publish to social accounts they connected. Draft only (Marketing Hub Enterprise only): the user cannot publish to any social accounts, but can create draft social posts in social accounts they connected or any shared social accounts. None: the user has no access to the social tool, which will not appear in the navigation menu when they are logged in. Content staging: toggle the Content staging switch on to let the user access the content staging tool. Website tools Blog: select the checkboxes to give the user Publish, Edit, or View access to the blog tool. Users with Edit access can create content in the blog tool, but cannot publish new posts or update live posts. Landing pages: select the checkboxes to give the user Publish, Edit, or View access to the landing pages tool. Users with Edit access can create landing pages but cannot publish new pages or update live pages. Website pages: select the checkboxes to give the user Publish, Edit, or View access to the website pages tool. Users with Edit access can create website pages but cannot publish new pages or update live pages. Please note: To create calls-to-action (CTAs), a user must have Edit or Publish access for Blog, Email, Landing pages, or Website pages. To view the SEO tool, a user must have at least View access to Email, Blog, Landing pages, or Website pages. To make updates to the SEO tool, a user must have at least Edit access to Email, Blog, Landing pages, or Website pages, or have access to Website settings. HubDB (CMS Hub only): select the checkboxes to give the user Publish, Edit, or View access to HubDB. Publish: the user can add new rows, edit existing rows, and delete rows from a table. Edit: the user can add rows to a table, clone locked rows, import data, and export data. View: the user can see data within the table rows and export data, but cannot add additional data. Please note: users must have HubDB table settings enabled in Account access to update table settings and create, clone, unpublish, or delete HubDB tables. URL redirects: select the checkbox to give the user View or Edit permissions in the URL redirects tool. Users with Edit access can create and update URL redirects. Design tools: toggle the Design tools switch on to let the user edit templates and modules. Users with this permission can also access the template marketplace and save marketing emails as templates. Please note: it's recommended to also give a user Global content settings and Website settings permissions if they'll need to edit global web assets and blog/website settings. Sales On the Sales tab, set more granular permissions and restrictions for sales tools such as products and templates, as well as assign paid Sales Hub seats. Manage product library: click to toggle the Manage product library switch on to let the user create and edit products in the product library. Create custom line items: this is turned on by default and lets the user create line items from a deal record or quote. To remove access for a user, click to toggle the Create custom line items switch off. Sales Access: click to toggle the Sales Access switch on to let the user access sales templates, snippets, documents, calling, and the meetings tool, as well as the option to connect their personal email. With the switch on, more granular permissions will appear for

HubSpot's sales tools: Templates: click to toggle Templates switch on to let the user create, edit, and delete templates. Users with assigned Sales Hub and Service Hub paid seats that do not have permission to create and edit templates will still be able to view and send templates. Create scheduling pages for others: click to toggle the Create scheduling pages for others switch on to let the user create, edit, and delete scheduling pages for other users. Sales Starter/Professional/Enterprise: click to toggle the Sales Starter/Professional/Enterprise switch on to let the user access sales tools available for the seat. By default, this includes playbooks, call transcription, and quote-based workflows. Please note: If you've assigned all of your paid seats, you can click Purchase another User to upgrade a user. Learn more about managing paid Sales Hub users. Forecast: customize Edit and View access to the sales forecast tool and revenue goals. All users can create a goal. Users with Sales Hub Professional or Enterprise or Service Hub Professional or Enterprise paid seats can be assigned a goal. Users with Owned only view permissions can only view their own goals and forecasts. Users with Team only view permissions can see their own goals and forecasts as well as their teammates within that team. Playbooks: select the checkboxes to give the user Publish or Edit access to playbooks. Only Sales Hub Professional and Enterprise users with Account Access permissions can edit a user's Publish and Edit permissions for playbooks. Sequences: click to toggle the Sequences switch on to let the user create and edit sequences. Users with assigned Sales Hub Professional or Enterprise or Service Hub Professional or Enterprise paid seats that do not have permission to create and edit sequences will still be able to view and send sequences. Bulk enroll sequences: this is turned on by default for Sales Hub Professional and Enterprise users. Click to toggle the Bulk enroll sequences switch off to remove a user's access to bulk enroll contacts in a sequence. When this is turned off, users can only enroll one contact at a time. If you're a US-based company using the payments tool, you can customize which users can create payment links or manage your account's transaction history. Use these permissions options to manage access for both your front and back-office teams: Manage payment links: click to toggle the Manage payment links switch on to let the user create, edit, and delete payment links. Manage payments and subscriptions: click to toggle the Manage payments and subscriptions switch on to let the user view transaction and payout history, download payment and payout reports, resend receipts, cancel subscriptions, and issue refunds. Service On the Services tab, you can set more granular permissions for HubSpot's service tools. Service Access: toggle the Service Access switch on to let the user access the service tools. With the switch on, more granular permissions will appear for HubSpot's service tools. Customer feedback surveys: the Edit checkbox lets the user create surveys in the feedback tool. Knowledge base articles: select the checkboxes to give the user Publish or Edit access to the knowledge base tool. Users with the Edit access can create knowledge base articles, but cannot publish or update them. Templates: click to toggle the Templates switch on to let the user create, edit, and delete templates. Users with assigned Sales Hub and Service Hub paid seats that do not have permission to create and edit templates will still be able to view and send templates. Create scheduling pages for others: click to toggle the Create scheduling pages for others switch on to let the user create, edit, and delete scheduling pages for other users. Service Starter/Professional/Enterprise: toggle the Service Starter/Professional/Enterprise switch on to assign the user a Service Hub Starter, Professional, or Enterprise seats, if they are available. Learn more about managing paid Service Hub users. Playbooks: select the checkboxes to give the user Publish or Edit access to the playbooks tool. Only Service Hub Professional and Enterprise users with Account Access permissions can edit a user's Publish and Edit permissions for playbooks. Sequences: click to toggle the Sequences switch on to give the user access to create and edit sequences. Users with assigned Sales Hub Professional or Enterprise or Service Hub Professional or Enterprise paid seats that do not have permission to create and edit sequences will still be able to view and send sequences. Bulk enroll sequences: this is enabled by default for Sales Hub Professional and Enterprise users. Click to toggle the Bulk enroll sequences switch off to remove a user's access to bulk enroll contacts in a sequence. When this is turned off, users can only enroll one contact at a time. On the Reports tab, you can give the user the permissions to create, edit, and/or view dashboards, reports, and analytics tools. Data quality tools access: toggle the Data quality tools access switch on to let non-super admin users access the data quality command center to monitor and clean data quality issues. Reports access: toggle the Reports access switch on to let the user access reporting tools, including dashboards, reports, and analytics tools. With the switch on, more granular permissions will appear for HubSpot's reporting tools. Dashboard, reports, & analytics: select the checkboxes to give the user Create/own, Edit, or Edit access to reporting tools. Create/own: lets the user create and own dashboards and reports. Edit: lets the user edit dashboards, reports, and analytics tools that they have access to. This will be selected if you grant permission to the user to create and own. View: lets the user view dashboards, reports, and analytics tools. This is selected by default when the Reports access switch is toggled on. Marketing reports: toggle the Marketing reports switch on to let users access marketing reports in HubSpot's analytics tools. This includes traffic analytics, page performance, competitors, tracking URL builder, events (Marketing Hub Enterprise only), and reports settings. Account On the Account tab, you can set more granular permissions for account administration. Settings Reports & dashboards: toggle the Reports & dashboards switch on to let the user create any report or dashboard. This permission also gives access to all analytics tools and will override any settings in the Reports permission tab. Domain settings: toggle the Domain settings switch on to let the user connect and edit domains. User table settings: toggle the User table settings switch on to let the user view the list of users in their HubSpot account. Availability Management: toggle the Availability Management switch on to let the user edit team members' availability in the conversations inbox. The Account Access permission gives the user account admin access. By default, the following access is given with the permission enabled, and they can be disabled by toggling the switches off. Please note: if you're a user in a Professional or Enterprise account and are using multiple currencies, you must be a super admin to edit the account's default currency. In addition, users with Account Access permission can do the following by default: Super admin permissions give access to all the account tools and settings detailed in this article, except for paid Sales Hub or Service Hub features, which require a paid seat. Super admins can also access the account's API key and create and manage scheduling pages for the other users in the account. Super admin permission sets are not modifiable. If you remove a user as a super admin, their level of access will be altered depending on what new permissions they are assigned. Only a super admin can set another user as a super admin. To make a user a super admin, click the Actions dropdown menu and select Make super admin. If a super admin is required to complete a task or process, it's recommended to have an existing super admin complete the task instead of updating an individual user's permissions. Partner account On the Partner tab, you can give a user access to partner tools in your HubSpot account and designate them as a Partner employee in client portals. By default, all new users in a partner account will not be given access to partner tools until Partner tools access is toggled on. Partner tools access: toggle the Partner tools access switch on to give the user access to partner tools. Partner dashboard: select the checkboxes to give the user Edit or View access to the partner dashboard. Solutions directory: select the Edit checkbox to give the user Edit access to the directory. Partner Employee management: select the checkbox to give the user View or Edit access to the list of partner employees for a client. Partner employee: toggle the Partner employee switch on in a HubSpot Partner account to mark a user as a Partner employee when they are added as a user in a client's HubSpot account. Account Settings