

# Your Linen Service Hubspot User Manual



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# Accessing & Logging in to Hubspot

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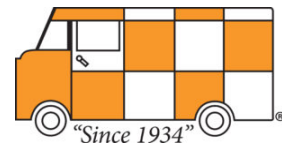


# Accessing & Logging in to Hubspot

- If you are logging into Hubspot for the first time, or if your login has been re-issued:
  - Click the login link contained in the login email from [noreply@hubspot.com](mailto:noreply@hubspot.com).
  - Enter a new password, which you will use going forward.
  - Click the SAVE button.
- Otherwise:
  - Go <https://app.hubspot.com/login/> using your web browser. *Note: Chrome is the preferred web browser to use with Hubspot.*
  - Enter your User Name.
  - Enter your Password (case sensitive).
  - Click Log In

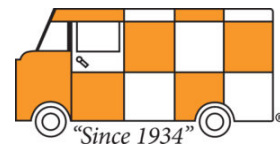
## Forgot Your Password?

- Click the **Forgot my Password** link in the login screen
- Enter your email address and click the **Reset Your Password** button. An email will be sent to you from Hubspot
- Click the link in the email.
- Create a new password and click **Save**



# Navigating Hubspot

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# Navigating Hubspot

## Hubspot Main Navigation Bar



Click the Hubspot icon to be taken back to the main Dashboards page

**Contacts** takes you to:

- Contacts
- Companies
- Activity Feed
- Lists

**Conversations** takes you to:

- Snippets
- Email Templates

**Sales** takes you to:

- Deals
- Tasks
- Documents
- Meetings

**Reports** takes you to:

- Dashboards
- Reports

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# Navigating Hubspot



## Search Bar

You can use the search bar in the top right hand corner of the navigation pane (next to the magnifying glass icon) to search for Contacts, Companies or Deals in the CRM. Hubspot will look to find exact matches or close matches to your search. Click on the name that you are searching for that pops up to be taken to that record.

The screenshot shows the HubSpot CRM navigation bar at the top. The search bar on the right contains the text "jess cardenas". A red arrow points to this search bar. Below the navigation bar, a search results dropdown is visible, titled "Searching for 'jess cardenas'". The first result is a contact card for Jess Cardenas, with the email address jess@imaginellc.com and buttons for Call, Note, and Email. Below this, there are sections for "Contacts" and "Companies". The "Contacts" section lists several contacts, including Jess (The Irish Penny), Jess Raynes (Washington State Community College), Jess Meth (Parkersburg Treatment Center), and Jess/ nancy (Assateague Island surf shop & cafe). The "Companies" section lists Message By Jess. A "See all" link is also present under the contacts section.

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# Navigating Hubspot



## Contact, Company and Deal Records

Contact, Company & Deal Records have the same layout. The left panel has the About Section that holds all property data for the contact, company or deal. The middle panel is the activity stream and shows all activity for the person, company and deal including outreach to them and their activity on the website. The right panel shows associations, attachments, list memberships and workflow memberships.

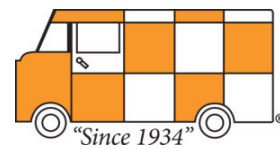
The screenshot displays the HubSpot CRM interface for a contact record. The interface is divided into three main panels:

- Left Panel (About Section):** Contains contact information for Jess Cardenas, including first and last name, email address (jess@imaginehlc.com), and phone number. It also includes a 'Website activity' section.
- Middle Panel (Activity Stream):** Shows a list of activities, including an email titled 'RE: CRM Spreadsheet' sent on June 21, 2019. The email content is visible, showing a conversation about a CRM spreadsheet. The text 'Activity Stream' is overlaid in orange.
- Right Panel (Attachments & Associations):** Displays various associations and attachments, such as 'Company (0)', 'Deals (0)', 'Tickets (0)', and 'Attachments'. The text 'Attachments & Associations' is overlaid in orange.

Additional orange text overlays include 'About Section' on the left and 'Activity Stream' in the middle.

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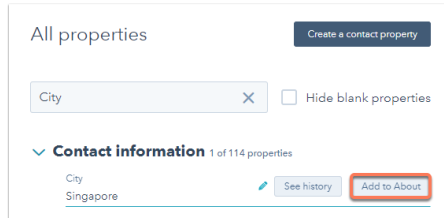




# Navigating Hubspot

## Customizing the About Section

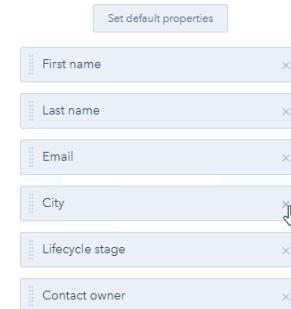
- In your HubSpot account, [navigate to your contacts, companies, or deals](#).
- Click the name of the record.
- In the left panel, click View all properties.
- On the right, locate and hover over the property you want to add to the *About* section, then click Add to About.



- On the left, click **X** to remove the property from the About section. If the X is greyed out, the property is an account-wide default property that cannot be removed.
- Click and drag **properties** in the left column to reorder properties in the *About* section.

### About

These contact properties will appear on every contact record you view. You can also set your team's default properties in account settings.



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## Creating contacts, companies, or deals

- In your HubSpot account, [navigate to your contacts, companies, deals, or tickets](#).
- In the upper right, click **Create [object]**.
- In the right pane, enter the **properties** of the object. For deals, learn how to [associate other records and their activities](#) to your newly created deal.
- For contacts and companies, additional fields will appear.
- Click **Create [object]**.

**Create contact** ✕

Email \*

First name \*

Last name \*

Contact owner  
Casper Ong Start by entering the contact's name, email, or both.

Job title

Create contact Create and add another Cancel

**Please note:** although it is possible to add contacts to the CRM without an email address, it is not generally recommended because HubSpot uses the email address to [deduplicate contacts](#) and [automatically associate contacts with companies](#).

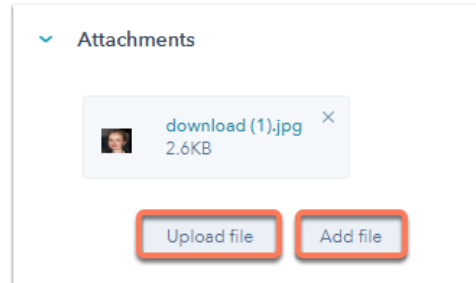
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## Adding Attachments to records

- In your HubSpot account, [navigate to your contacts, companies, deals, or tickets](#).
- Click the **name** of the contact, company, or deal record.
- In the right panel, scroll down to the *Attachments* section.
- Click **Upload file** to upload a file from your computer or click **Add file** to select a previously uploaded file.





# Working in Hubspot

## Creating Tasks, Setting Up and Using Task Queues

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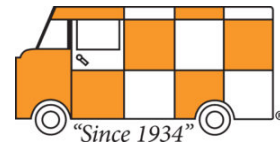
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## Creating tasks from the tasks dashboard

- In your HubSpot account, navigate to **Sales > Tasks**.
- In the upper right, click **Create a task**.
- In the right panel:
  - **Title:** enter a **task name** in the *Title* field. Include the text *call* or *email* in the title of your task to automatically set the corresponding task type.
  - **Associate with records:** click the dropdown menu to search and select **records** to be associated to the task.
  - **Due date:** click the dropdown menus to select the due date and time.
  - **Email reminder:** click the dropdown menus to select the date and time of the email reminder to be sent to the task owner.
  - **Notes:** enter details about your task.
  - **Type:** click the dropdown menu to select **Call**, **Email**, or **To-do** as a task type.
  - **Queue:** click the dropdown menu to add the task to an existing task queue or to create a new task queue.
  - **Assigned to:** click the dropdown menu to select a **user** the task will be assigned to.
- Click **Save**.

# Working in Hubspot

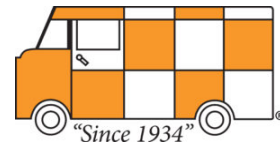


## Creating tasks from a contact, company or deal record

- In your HubSpot account, [navigate to your contacts, companies, or deals](#).
- Click the **name** of the contact, company, deal, or ticket.
- In the left panel, click **Task tasks**.
- In the window at the bottom, enter the details for your task:
  - **Title:** enter the task's name. Include the text *call* or *email* to automatically set the corresponding task type.
  - **Due date:** click the dropdown menus to select a due date and time for the task.
  - **Notes:** enter details on your task.
  - **Associated with X record(s):** click the dropdown menu to view, add and remove any other records to the task.
  - **Task type:** click the dropdown menu to select **Call**, **Email**, or **To-do**.
  - **Assigned to:** select a **user** responsible for the task in the *Assigned to* dropdown menu.
  - **Email reminder:** click the dropdown menus to select a date and time for an email reminder to be sent to the task owner.
  - **Queue:** click the dropdown menu to add the task to an existing task queue or to create a new task queue. Choose **None** if you don't wish to add this task to a task queue.
- Click **Save Task**

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## Create a follow up task when logging an email or call

- In your HubSpot account, [navigate to your contacts, companies, or deals](#).
- Click the **name** of the contact, company, deal, or ticket.
- In the left panel, click **Email email** or **Call calling** and enter the email or call information.
- Before sending the email or saving the call, select the **Create a task to follow up** checkbox and click the **dropdown menu** to set a due date for your task.

Email

Templates Sequences Documents Meetings Quotes

To Casper Ong X Cc Bcc

From

Subject On our last chat.

Hi there,  
Please let me know.  
--  
Prefer fewer emails from me? Click [here](#)

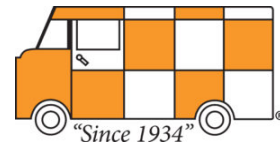
A [Icons] Associated with 2 records

Send Send Later  Create a task to follow up in 3 business days

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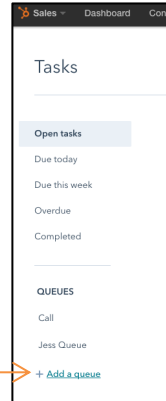


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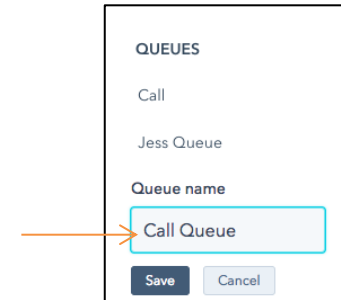


## Setting Up Task Queues

- Open HubSpot, select Sales from the top toolbar, and select Tasks from the dropdown
- On the left side under Tasks, Select “Add queue” to create a new queue

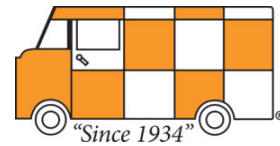


- Name your Queue and hit save. It is recommended that you create an Email Queue and Call Queue



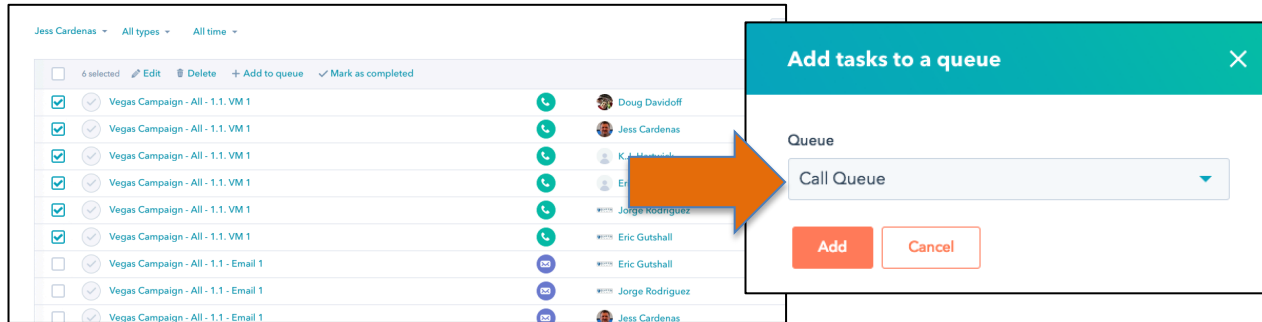
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## Running the task Queue

- In the Hubspot Task Dashboard, select **Open Tasks** on the left-hand menu
- Check boxes for the tasks that you would like to add and select “add to Queue”. A pop up will appear. Select from the drop down which task queue you would like to add to.



- Select the task queue that you would like to work from the bottom left hand side of the screen.
- You will be taken to that queue. Click **Start Queue** in the top right to begin your calling or emailing

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## Creating and Sending Email Templates

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## Creating Email Templates

- In your HubSpot account, navigate to **Conversations > Templates**.
- Click **New template**, then select **From scratch**.
- Enter a **name** and **subject** for your template.
- Enter the body of your email.
  - Use the formatting options at the bottom of the editing window to modify the text, add an image, or insert a link.
  - To enter a short, reusable block of text, click the **Snippets** dropdown menu.
  - To insert one of your **sales documents**, click the **Document** dropdown menu.
  - To include **personalization tokens** in your email template, click the **Token** dropdown menu. Learn more about [adding personalization tokens to your sales email templates](#).
  - To insert a **meeting link**, click the **Meeting link** dropdown menu.
- When you've finished creating your template, click **Save template**.

**Edit Template**

Name: The "Next Step" Email Select a Folder

Subject: Update?

Hi, **Contact: First name**.

After our last conversation, I hadn't heard from you and was curious to see if you were still interested.

Let me know either way and I can amend your account over here. What makes sense as a next step, if any?

All the best,  
Julia

1 2 3 4 5

A [ ] [ ] [ ]

Insert: [ ] Snippets [ ] Document [ ] Token [ ] Meeting Link

Save template Cancel This email looks fantastic!

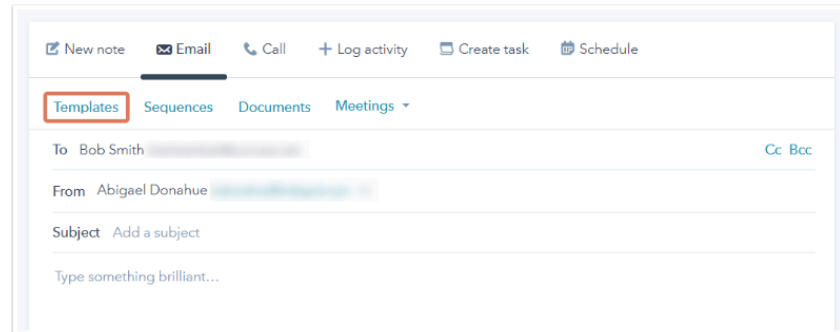
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## Send an Email Template

- In your HubSpot account, navigate to [contacts, companies, or deals](#).
- Click the **name** of a record
- In the left panel, click the **Email icon** email.
- In the pop-up box, click **Templates**.



- In the dialog box, hover over the template you want to send and click **Select**.
- Customize the content as needed, then click **Send**.
- The email will be tracked automatically, and the information will be added to your template report data.

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## Calling and Logging Activity

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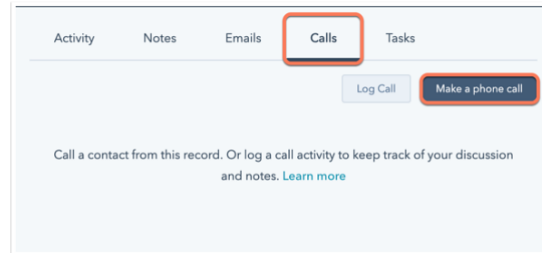
# Working in Hubspot



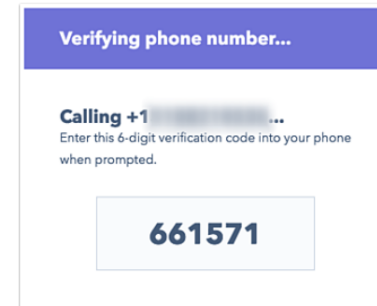
## Registering your phone number for calling

Before you can start making calls, you'll need to add your phone number to HubSpot and verify it. The phone number registration process for calling with HubSpot is user-specific. While two or more users can use the same number in your account, each user must register the phone number individually.

- In your HubSpot account, navigate to **Contacts > Contacts**.
- Click the **name** of a contact.
- On the contact record, click the **Calls** tab.
- Click **Make a phone call** to register your phone number.



- In the window that opens at the bottom, click **Add your phone number**.
- In the dialog box, enter your **phone number** and an extension (if applicable). Then, click **Register**.
- Next, you'll receive a phone call to verify that you have access to the phone number added. When prompted, enter the verification code that appears on your screen.
- Once this is completed, a confirmation message will appear. You can now make calls with HubSpot's calling tool.



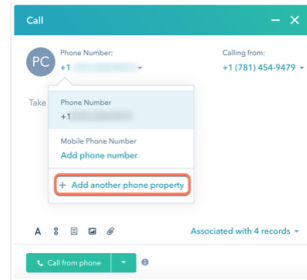
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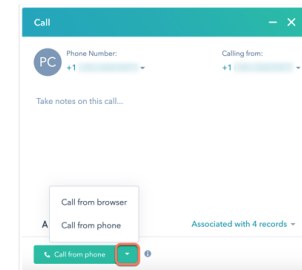


## Calling from your phone

- In your HubSpot account, navigate to **Contacts, Companies, or Deals**.
- Click the **name** of a contact.
- On the contact record, click the **Calls** tab.
- Click **Make a phone call**.
- In the window that opens at the bottom, you can select which phone number you want to call by clicking the *Phone Number dropdown menu*. By default, the calling tool will use the phone number stored in the *Phone number* property. If the contact's phone number is stored in a different property, such as *Mobile phone number*, you can select that property instead. You can add an existing property to this list by clicking **+ Add another phone property**.



- Click **Call from phone**. If the option is set to *Call from browser*, click the **dropdown menu** and select **Call from phone**.
- You'll receive a phone call from an automated system, which will connect you with your contact. The recipient's caller ID will display whichever phone number is selected in the *Calling from* dropdown menu.



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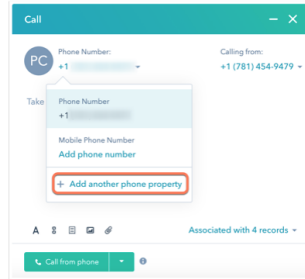


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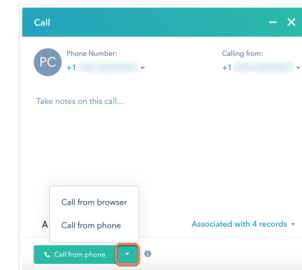


## Calling from your browser

- In your HubSpot account, navigate to **Contacts, Companies, or Deals**.
- Click the **name** of a contact.
- On the contact record, click the **Calls** tab.
- Click **Make a phone call**.
- In the window that opens at the bottom, you can select which phone number you want to call by clicking the *Phone Number* **dropdown menu**. By default, the calling tool will use the phone number stored in the *Phone number* property. If the contact's phone number is stored in a different property, such as *Mobile phone number*, you can select that property instead. You can add an existing property to this list by clicking **+ Add another phone property**.

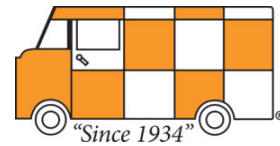


- Click **Call from browser**. If the option is set to *Call from browser*, click the **dropdown menu** and select **Call from browser**.
- The recipient's caller ID will display whichever phone number you have set as the [default for calling](#).
- If you need to enter an extension after beginning your call, click the **Keypad icon** in the upper right



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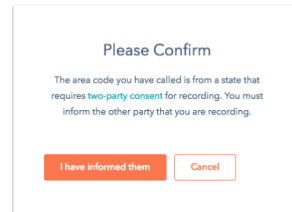


## Record your call and notes

- Once the call is connected, in the upper right, click **Record** to record the call. You can also type notes during the call.



- Call recording will be automatically enabled for [one-party consent states](#). For all other areas, you'll need to get consent from the party you are calling in order to enable recording. In this case, you'll receive an alert after clicking **Record**. Make sure you inform the contact that you're recording the call, then click **I have informed them**.



- When the call ends, you can add any additional notes and click the **Select an outcome** dropdown to select the call outcome.
- Click **Save call** to save the call on the timeline.

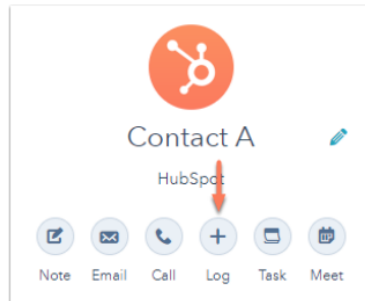
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## Manually log a call, email, meeting on a record

- In your HubSpot account, [navigate to your contacts, companies, deals, or tickets](#).
- Click the **name** of the record.
- In the left panel, click the **Log icon** add.



- In the dialog box, click the **Log a call** dropdown menu to select the **type** of activity to log (i.e. **Log a call**, **Log an email**, **Log a meeting**).
- Click the **date** and **time** to update the date and time of the activity. Click the **icons** in the formatting bar to format your text.
- The activity will appear on the timeline of the records shown in the *Associated with* dropdown menu. Click the **Associated with** dropdown menu to search and select **records** you'd like to associate with the activity, or deselect records to dissociate them from the activity.
- When you're done, click **Log activity**. The activity will now appear in the record's timeline.

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