MW Components

HubSpot CRM – Records

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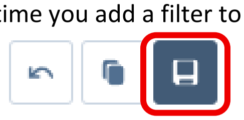
Getting Started:

1. To navigate to any Record page: In the left side navigation bar, Click CRM then select the desired Record in the drop-down box. You will be brought to that Records Homepage.
    a. From this page, you can Preview customer information, set up filters (to only show certain records), Create a new record (Contact, Company, Deal and more!).

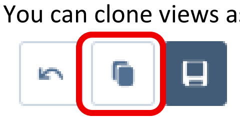
Create a new personalized View:

1. To create another view to save your filters on the record homepage, select + Add view
2. When the drop-down opens, you can either select a view that has already been created within HubSpot, or you can Create new view
    a. When creating a new view, you will enter/create the view's Name and who you would like to share with (private, my team, or everyone)
    b. You will see your new view located next to the rest of your Views.
3. Once your new view is created, you can then set filters to only show what you would like to see
    a. To do so, you can filter by Owner, Create date, Last activity date, and many more, such as Site by clicking More filters.

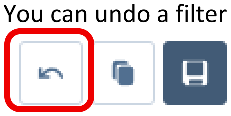
You can set multiple filters for one view to narrow down your search. Make sure to click this button each time you add a filter to save your Views.



You can clone views as well by selecting this button



You can undo a filter by clicking this button.



Create a new Record:

1. To create a new Record, select the orange button titled **Create "Record"** in the top right corner of the Record homepage

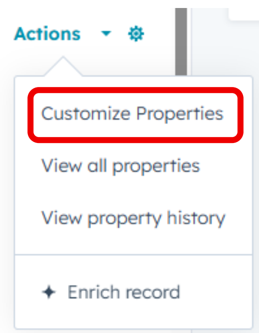
2. The form will pop up, asking you to fill in the related information.

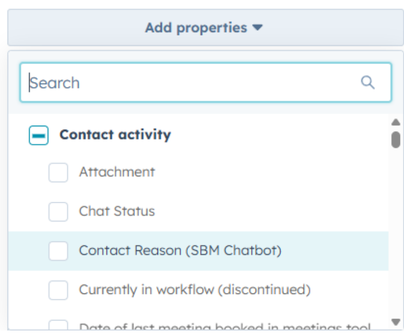
Fields with an * are required.

3. Now, click Create at the bottom of the form. The record will automatically open after that.

Properties within a Record:

1. About this record is in the left side column. You can adjust what properties are shown here by clicking **Actions** and selecting **Customize Properties**. The popup will appear on the right side of your screen. You can adjust the order or add any properties not shown.

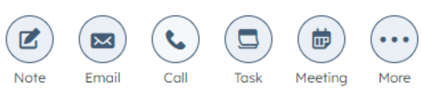




Activity sections of a Record:

Follow up Tasks: A prompt to create a Follow Up Task will appear after any activity.

Activity Buttons: circles under Record name in the top left section are short cuts to these activities



1. Activity Tab – 1st tab in the middle section of a record
   a. Shows all activity regarding the Record such as the create date, emails sent, notes created, meetings, etc.
   b. There are several cases where multiple sites and salespeople work on the same account. You can filter to view just your Sites or your activity with that Record.

2. Notes Tab – 2nd tab in the middle section of a Record:

    a. To create a note, select Create note in the right corner or by using the Note action button.

☆ This tab is for internal information that is important for all salespeople to know about the company ie. Brand specific, freight or shipping notes, personal information about purchasers, special pricing etc.

3. Emails Tab – 3rd tab in the middle section of the Record. View of all emails. You have 2 options here, Log email or Create email.

    a. **Log email**: Enter a previous email that was not tracked by HubSpot

    b. **Create email**: Send an email from within the HubSpot web app.

        i. **Templates:**

            1. You can use/create email templates within HubSpot so you do not have to keep typing the same email body.

        ii. **Sequences:**

            1. These are a series of timed automated emails

            2. You can create a sequence of follow-ups that are automatically sent on your select date. If the customer replies before the next sequence email, the remaining automatic emails are put on hold until you go in and reactive the sequence.

            3. Note: OOO replies will not kick your contact is out of the sequence if it is Outlook to Gmail or Outlook to Outlook

        iii. **Documents:**

            1. Sell sheets – The link to the document attaches to the body of your email. HubSpot tracks the documents and will notify you when the contact clicks/opens it.

            2. Note: If you do not want it to be a link you can always add as an attachment with the paperclip at the bottom of the email.

        iv. **Meetings:**

            1. Insert proposed times – Select various dates and times you'd like your customer or prospect to choose from to meet.

            2. Insert meeting link – select a link to allow your customer or prospect to access your availability and choose and a date/time to meet.

4. Calls Tab – 4th tab in the middle section of a Record:

    a. Like the emails tab with 2 options, Log call (call that was not captured/tracked in HubSpot) or make a phone call

    b. Calls can be recorded in HubSpot if you are in a state that allows it – great for training!

    ☆ Please note that a soft phone is required to call within the HubSpot tool

5. Tasks Tab – 5th tab in the middle section of a Record:

    a. Creating a task is a personal reminder/follow-up for you to stay connected with a contact or company and keep track of your to-do list. Tasks can be created within notes, emails, or calls as well. The standard task due date is 3 business days, but you can change this depending on when you would like to complete the task.

6. Meetings Tab – 6th tab in the middle section of a Record:

    a. Again here, you can either Log meeting (meeting that was not captured/tracked in HubSpot) or Create meeting.
    b. When logging a meeting – the description/notes portion here is used for internal information that will NOT be sent to the contact.
    c. When creating a meeting – the description/notes portion here WILL be sent to the contact for them to accept via email invitation.

    ★ Please make sure to log intercompany notes into the **Internal Note** section to avoid that being shared with meeting attendees.