

## Tools for Partners to Register Their Contacts with HubSpot

This document contains everything a HubSpot partner needs to know about registering their contacts in the HubSpot sales database. If you are a HubSpot partner, improve visibility into your pipeline of registered leads and accounts by leveraging HubSpot's Partner Registration Tools from directly within your portal or partner toolset.

The following guide will help you understand everything you need to know about this process.

1. Navigating to Partner Registration Information Within Your Portal
2. Understanding Partner Properties
3. How to Request Contact Registration with HubSpot Sales Database
4. Viewing Partner Registration Smart Lists
5. Understanding Partner Registration Smart Lists



## HubSpot Partner Program

### Registering Your Contacts With HubSpot

## 1a. Navigate to Contacts Home

HubSpot Dashboard Content Social **Contacts** Reports Partner Resources sales.hubspot.com Hub ID: 152363

Contacts Tutorial Overview Video

Contacts Home (selected)  
Prospects  
Lists  
Workflows  
Forms  
Imports  
Contacts Settings

All lists

Name	Created On	Email
bnault@hello.com	5/5/2014	bnault@hello.com
Kimberly Dempsey	5/2/2014	kdempsey@hubspot.com
Sam Kusnitz	5/2/2014	skusnitz@hubspot.com
Kyle Beaudreault	5/2/2014	kbeaudreault@hubspot.com
Michael Vegeto	5/2/2014	mvegeto@hubspot.com
Anna Faber-Hammond	5/2/2014	afaberhammond@hubspot.com
Anna Faber-Hammond	5/2/2014	annafh16@gmail.com
Brian Balfour	5/2/2014	bbalfour@hubspot.com
Zachary Reynolds	5/2/2014	zreynolds@hubspot.com
Raynor Bugayong	5/2/2014	rbugayong@hubspot.com
Logan Gillis	5/2/2014	lgillis@hubspot.com
Jesse Moran	5/2/2014	jmoran@hubspot.com
Graham O'Connor	5/2/2014	goconnor@hubspot.com
Jason Azocar	5/2/2014	jazocar@hubspot.com

**Add New Contact**  
**Import Contacts**

**3,638**  
Total contacts

**21h ago**  
Last contact added

- Manage Contact Lists**  
Group your contacts into ultra-targeted segments.
- Manage Email**  
Send the kinds of emails your contacts love to read.
- Manage Workflows**  
Let workflows handle your most valuable routine tasks.
- Forms**  
Make better forms, gather more data, convert more contacts.
- Manage Settings**  
Bend the universe to your will. Start with your software.

## 1b. Navigate to an individual Contact

Contacts Tutorial Overview Video

All lists

**Select a Contact**

Name	Created On	Lifecycle Stage	Email
Jillian Wohlfarth	6/12/2013	Customer	
Jillian Day	12/6/2012	Opportunity	
Jillian Berry	10/10/2012	Opportunity	

## 1c. Navigate to Contact Properties

The screenshot shows the HubSpot contact profile for Jillian Berry. The top navigation bar includes links for Dashboard, Content, Social, **Contacts**, Reports, Partner, and Resources. The contact's name is Jillian Berry, and there are action links: + Add/Remove from Lists, Resync with Salesforce, Opt Out of Email, and Close as. Below the name is a profile picture and a link to Return to All Contacts. A sidebar on the left lists navigation options: Contact Details, Overview, **Properties** (highlighted with an orange arrow), Account, Lists, Property History, Workflows, Contact Research, Search in Google, View in Salesforce, Public Contact URL (https://app.hubspot.cc), and Contacts Settings. The main content area shows contact details: First Touch (2 Years Ago, Import), Last Touch (3 Days Ago, Opened Email), and Lifecycle Stage (Opportunity, Since Apr 3, 2014). A 'Starred' section is also present. Below this, there are input fields for First Name (Jillian), Follower Count (103), Last Name (Berry), Original Source Type (Offline Sources), Recent Conversion, and Twitter Username (jillzzy). A 'Click Properties' button is highlighted with an orange box and an arrow pointing to the 'Properties' link in the sidebar. At the bottom, there is a section for 'Showing All 226 Interacti...' and a timeline of events for May, including 3 Emails, 3 Automation Events, 4 List Memberships, 1 Salesforce Sync, and a link to Science Fair video & wiki page.

## 1d. Navigate to Partner Registration Information

The screenshot shows the HubSpot interface for a contact named Jillian Berry. The top navigation bar includes links for Dashboard, Content, Social, Contacts, Reports, Partner, and Resources. The left sidebar lists various contact details, with 'Partner Registration Information' highlighted in an orange box. An orange arrow points from a text box labeled 'Select Partner Registration Information' to this link. The main content area displays the contact's profile, including a photo, a 'Contact' tab, and a list of properties such as Product Category, Markets, HubSpot's Blog Email Subscription, Date of First Purchase, Vacation Booking #1, Vacation Booking #2, Category, Ready for Admissions, Manhattan Blog Template Email Subscription, HubSpot Mark's Blog Email Subscription, Attended OS Summit13, Number of Previous Bookings, and Technology Category.

HubSpot

Dashboard Content Social Contacts Reports Partner Resources

Jillian Berry

+ Add/Remove from Lists Resync with Salesforce Opt Out of Email Close as

All Properties Search...

Contact

Product Category: Markets: HubSpot's Blog Email Subscription: Date of First Purchase: Vacation Booking #1: Vacation Booking #2: Category: Ready for Admissions: Manhattan Blog Template Email Subscri... HubSpot Mark's Blog Email Subscription: Attended OS Summit13: Number of Previous Bookings: Technology Category:

Return to All Contacts

Contact Details

Overview

Properties

Contact

Analytics

Company Information

Conversion Information

Email

Owner Information

Social Media

Salesforce

Other Properties

Calls

Partner Registration Information

Account

Lists

Property History

Select Partner Registration Information

## 2. Partner Registration Information - Property Details

1. Registration Action is where a partner can select to Request Registration of their contact within the HubSpot sales database
2. If the contact is successfully registered in HubSpot's sales database it will expire 1 year from the registration date
3. Registration Status will communicate the status of a contact as of the last sync with HubSpot's sales database. Possible values are Blank, Unavailable, Registered, Invalid Data,
4. Registration Message will provide details about the status, possible values are as follows
  - Contact Registered: This Contact was registered with HubSpot on YYYY-MM-DD
  - Contact Updated Existing: This Contact was re-registered with HubSpot on YYYY-MM-DD
  - Contact Unavailable: This Contact was unavailable on YYYY-MM-DD: HubSpot is actively pursuing this domain.
  - Invalid Contact Data: This Contact has invalid Contact data

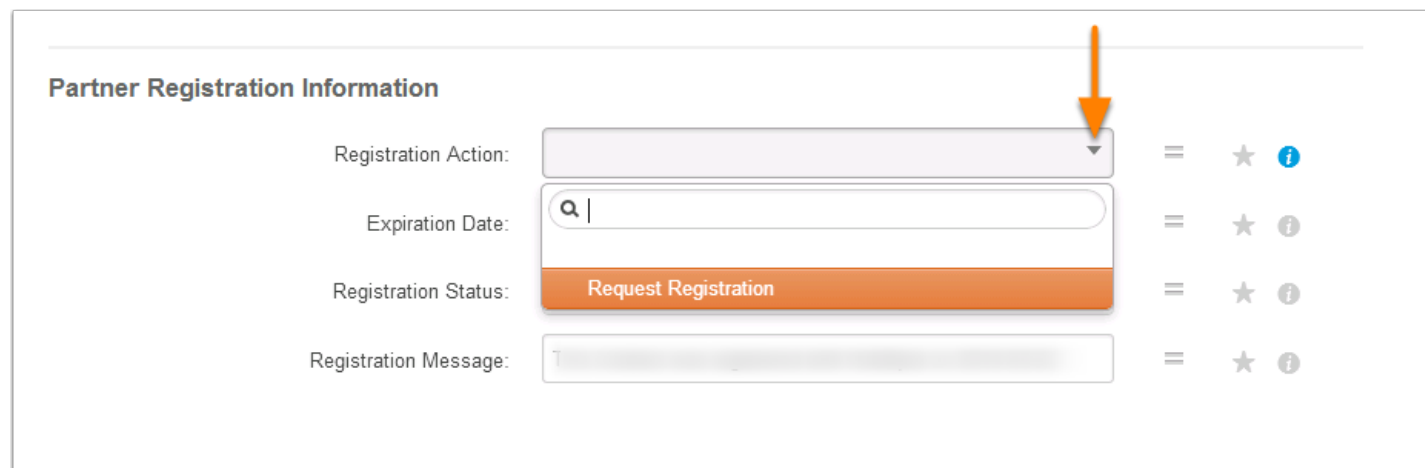
**NOTE - Depending on when your portal was enabled with the new lead registration tools your properties may have been created in a different order**

### Partner Registration Information



Registration Action:	<input type="text"/>	1	★	i
Expiration Date:	<input type="text"/>	2	★	i
Registration Status:	<input type="text"/>	3	★	i
Registration Message:	<input type="text"/>	4	★	i

## 3a. How to Request Registration


To request registration all you need to do is toggle the registration action and select "Request Registration" and click Save (see below)



**Partner Registration Information**

Registration Action: Request Registration  

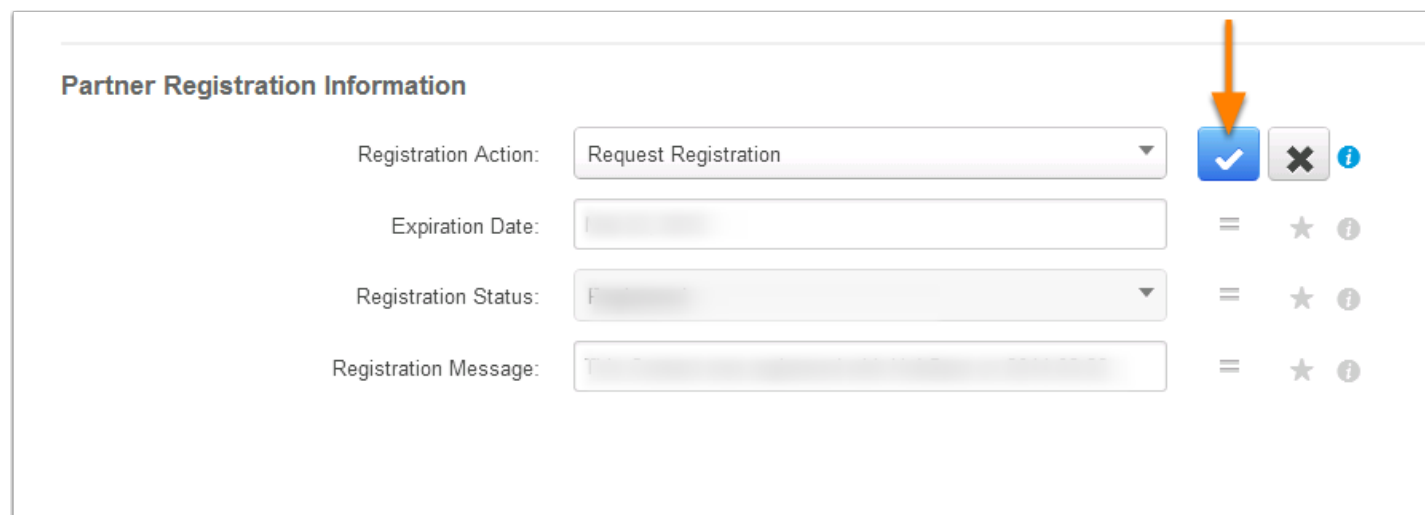
Expiration Date:

Registration Status: Request Registration 





Registration Message:

An orange arrow points to the dropdown arrow in the Registration Action field.



## 3b. Select Request Registration and Click Save



**Partner Registration Information**

Registration Action: Request Registration    

Expiration Date:

Registration Status: Request Registration  

Registration Message:

An orange arrow points to the Save button (blue square with a white checkmark).

## 4a. Contact Registration Smart Lists

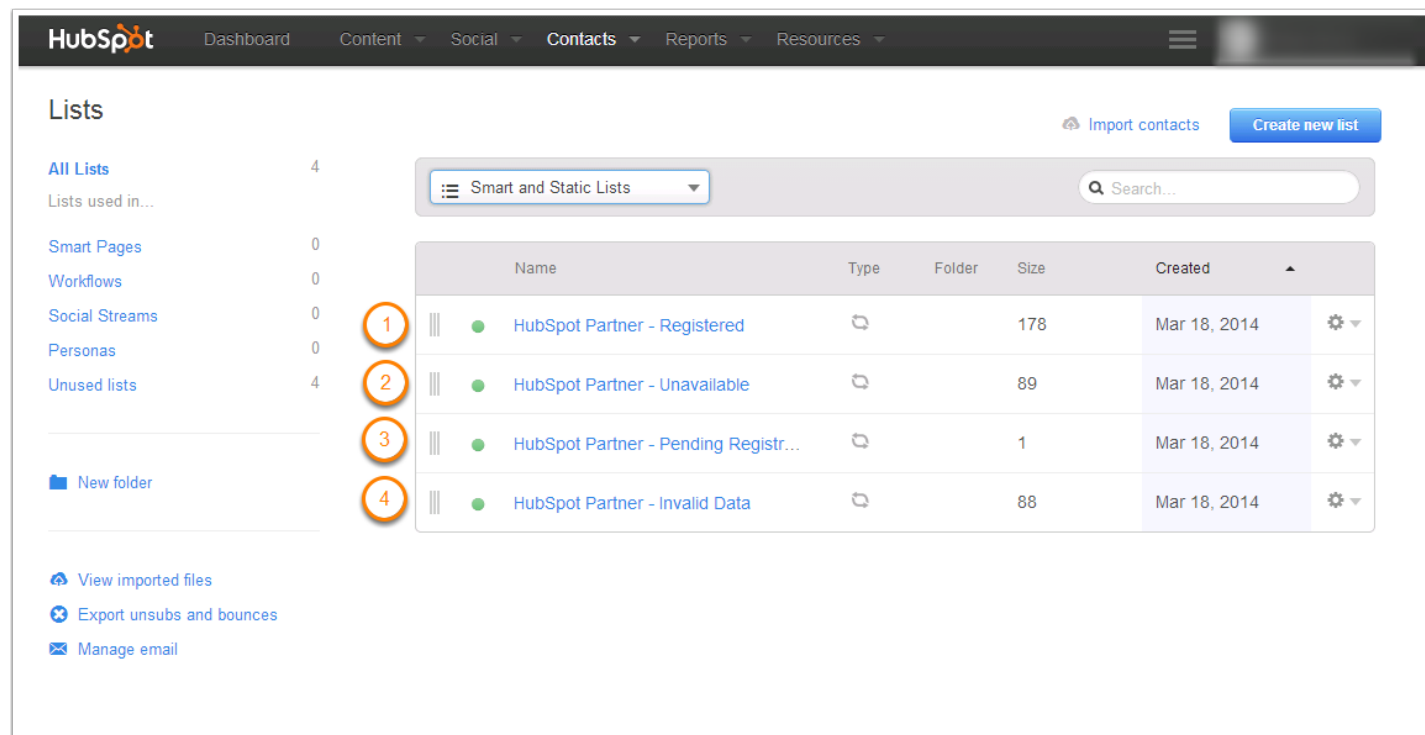
Four new lists have been created to help you see the status of all the contacts you have attempted to sync with HubSpot -- Navigate to Contacts --> Lists to view them

The screenshot shows the HubSpot interface with the 'Contacts' tab selected. A dropdown menu is open, showing options like 'Contacts Home', 'Prospects', 'Lists', 'Workflows', 'Forms', 'Imports', and 'Contacts Settings'. An orange arrow points to the 'Lists' option. Below the menu, a table lists various smart lists. The last four lists, related to HubSpot Partner registration, are highlighted with an orange box.

Name	Type	Folder	Size	Created
AS			0	May
Communications Trial Leads			0	May
Monitis High Value Trials			0	May
MQL/SQL			0	May
HubSpot Partner - Registered			0	May
HubSpot Partner - Unavailable			0	May
HubSpot Partner - Pending Registr...			0	May
HubSpot Partner - Invalid Data			3,631	May

## 4b. HubSpot Partner Lists

1. HubSpot Partner - Registered
2. HubSpot Partner - Unavailable
3. HubSpot Partner - Pending Registration
4. HubSpot Partner - Invalid Data



HubSpot

Dashboard Content Social **Contacts** Reports Resources

### Lists

Import contacts Create new list

Smart and Static Lists Search...

Name	Type	Folder	Size	Created
1 HubSpot Partner - Registered			178	Mar 18, 2014
2 HubSpot Partner - Unavailable			89	Mar 18, 2014
3 HubSpot Partner - Pending Registr...			1	Mar 18, 2014
4 HubSpot Partner - Invalid Data			88	Mar 18, 2014

New folder

View imported files  
Export unsubs and bounces  
Manage email



## 5. List Definition - What Does Membership in Each of These Lists Mean?

### HubSpot Partner - Registered

These contacts have been processed against our sales database and are owned by you until the expiration date listed.

### HubSpot Partner - Unavailable

These contacts were not successfully registered to you as they are being actively pursued by HubSpot.

### HubSpot Partner - Pending Registration

These are contacts that you have requested to register but have not yet been processed by our system

### HubSpot Partner - Invalid Data

These are contacts that do not meet the necessary requirements to be registered in our sales database

- **First Name** not populated
- **Last Name** not populated
- **Website** not populated
- **Email** not populated
- **Company** not populated
- No conversion events (\*unless manual registration was requested)
- Website does not meet HubSpot's domain formatting criteria
- HubSpot is not pursuing business with a given domain