

Video 1: How does importing data work with HubSpot CRM?

Hey there! It's Courtney from HubSpot Academy. Let's get your data into your CRM!

Your data is what will help you create human, helpful, and personalized experiences for your contacts. So how do you get that information into your CRM?

Outside of contacts filling out the forms on your website or being created through APIs, you'll bring your data into your CRM via importing.

While importing your data will occur during your initial CRM setup, you'll continuously use this data for as long as you use the HubSpot CRM.. Much like automation in the world of inbound, importing is not a set it and forget it task. You'll use importing to get the right data into your CRM so that you can consistently provide a human and helpful experience for your contacts.

So how does an import work with HubSpot?

There are three easy steps involved when getting your data into the CRM:

Step one, organize the data that's outside of your CRM in an Excel spreadsheet that's saved as a CSV file.

Step two, use the HubSpot import flow to get the data uploaded into HubSpot.

And step three, start using that data to personalize your interactions.

Once your data is imported, you'll be able to track that data and thus your contacts' movements throughout your business. From deal stages to the individual contact records, you'll be able to customize your CRM to your business needs.

But it all starts here with importing your data easily into your HubSpot CRM.

Video 2: How do you organize your data for import?

Before you import your data, you'll need to prepare your data. This means organizing your data outside of HubSpot before beginning the import process.

To make sure this process runs smoothly, you'll have a pre-import checklist with the following items:

- Prepare your import file,
- Match your properties,
- Review custom properties,
- Review properties with record types,
- And lastly, remove the blank spaces on your spreadsheet.

Let's walk through each step of your pre-import checklist to get your data ready for import.

First, prepare your import file. To import your data into HubSpot, you'll need to convert your data into a CSV file.

When importing, make sure that every piece of information has its own unique column in that import file.

To do this in your import file, include a header row in your file and match each column header with a property. You can include values for any of the default HubSpot properties or any custom properties you've created. A HubSpot property stores information about a contact, company, deal, or ticket.

Contacts are de-duplicated based on email address or object ID, so make sure one of those properties is included as one of the column headers. When you import a contact that's already in your database, that contact record will be updated with any new property values from your file.

If you have the "Automatically create and associate companies with contacts" setting enabled, contacts will be automatically associated with company records after the import by matching the email address domain of the contact to the company domain name on the company record.

If you want to assign an owner to an object during the import, you can do this by including a Contact Owner column in your file and adding the email address of the user to each row in that column.

If you don't want to overwrite an existing value for a property, you can either include the current value in the relevant column or leave the cell blank. HubSpot will not overwrite a property value unless there's a new value present in the file.

Next, match your properties together.

When matching your properties, you'll first review HubSpot default properties. HubSpot has a number of pre-made, un-editable properties where important information about your contacts, companies, deals, and tickets is stored

If you're importing properties that are already HubSpot default properties, make sure that the value is already stored in HubSpot.

You cannot edit some default HubSpot properties, for example, Lifecycle stage has specific values that must match the values in HubSpot.

You can check on the values already stored in the default properties in "Settings" and "Properties."

Next, review custom properties. Check to see if the properties you're looking to import that are custom to your business are already created in HubSpot.

And then review the properties with record types. Make sure you've made the distinction between contact and company properties.

Is it clear what properties will be matched with the different record types? For example, is the Company Name property listed as a Company property versus a contact property. By reviewing the custom properties you have created and making sure they match with the correct record types you can help import the most useful and organized data.

And your last item before importing will be seeing if your import file has any blank spaces, stray column headers, or loose information in your spreadsheet. If so, remove them.

Those are your steps for reviewing your data before importing. They'll help you avoid errors during the import process and help you get your data into HubSpot.

Video 3: How do you resolve import errors?

Import errors can happen for a variety of reasons. In the top navigation menu of your HubSpot account, select "Contacts" and then select "Contacts" from the dropdown menu. In the upper right-hand corner, select "Import" and navigate to your import screen.

Hover over the import file with errors.

Click the "More" dropdown menu and select "Download error file."

In that document, you can see which rows had errors. The error code will appear in the first column in the CSV file, Column A.

Some common errors are duplicate or missing email address, missing headers, and incorrect encoding.

Video 4: How do you import single objective data?

In your HubSpot top navigation menu, select the "Settings" gear icon.

From the left side-bar select "Import & Export"

In the upper-right corner, click "Go to imports."

Once on your imports screen navigate to the upper-right corner and select "Start an import".

Select "File from computer," you also have the option to import an opt-out list of contacts who are disqualified from receiving emails or importing contacts directly from your contacts in gmail. After selecting what you would like to import, navigate to the bottom right hand corner and click "Next."

Select the number of files you would like to import. You can import multiple files at a time to associate your different records such as contacts with their associated companies. Click on the numbers of files and then select "Next."

Now select the objects you are importing. Objects are the collective groups of records in your CRM. Such as contacts, companies or deals. If you are only importing one type of record such as Contacts you will select "One Object" and click next.

Then choose the type of object you want to import. For this example, click "Contacts," then in the bottom-right, click "Next."

Click "choose a file." In the dialog box, select the import file from your device. Check the box if you're using the object ID to de-duplicate your contact, company, deal, or ticket records. Click "Next."

On the Map screen, HubSpot will automatically match the columns in your file to your contact properties.

You'll see a preview of the property values from your spreadsheet in the "Preview Information" column.

If any columns do not match an existing property, click the corresponding dropdown menu.

Choose an existing property in your HubSpot account to map the column header to. Or click "Create new property" to set up a new custom property in the right pane to which this column will be mapped.

To skip importing this column from your spreadsheet, navigate to the bottom-right corner and check the box beside "Do not import rows in unmatched columns."

After you've mapped all the columns from your file, click "Next."

On the details screen, click the "Import name" field to enter a name for your import.

If you've turned on General Data Protection Regulation, or GDPR, functionality in your account, use the "Set the legal basis for processing a contact's data" dropdown menu to select a lawful basis of processing.

Once you've set the options for your import, navigate to the bottom-right and click "Finish import."

After the import begins, you'll be taken back to the imports dashboard.

If you want a list of your recently imported contacts, you can create a list from the imports dashboard.

Hover over the name of the contact import. Click the More dropdown menu and select New contacts list to open the list builder.

In the top-left corner, click the pencil icon and give your list a name.

Click AND or OR to add more criteria to your list.

When you're done, navigate to the upper-right corner and click "Save."

Video 5: How do you import data with associations?

In your HubSpot top navigation menu, select the "Settings" gear icon.

From the left side-bar select "Import & Export"

In the upper-right corner, click "Go to import."

Once on your imports screen navigate to the upper-right corner and select "Start an import".

Select "File from computer." Navigate to the bottom right hand corner and click "Next."

Now select the objects you are importing. As you are importing multiple files you will select "Multiple files with associations" to import. Click "Next".

Now you will select the two different types of objects you are importing. You will only be able to select two to make associations for during import. In this example select contacts and deals. Click, "Next".

On the "Select and import file" screen you will select both of the files you will to import. In this case your Contact file and your Deal file. Click "Next".

You will now choose how to associate your data. Your files share column headers in common. These will tell HubSpot how to associate your data. Choose which common column you want to use to associate your data. In this case "Deal Name".

And then the common column between your files should also be the unique key for one of your objects. This unique key is used to associate objects based on individual data but only belongs to one object. In this case "Deal Name" is associated with Deal objects. Click "Next".

On the Map screen, HubSpot will automatically match the columns in your files you are importing. Similar to when you import a single file you will match the properties you are importing.

To skip any columns without a match, navigate to the bottom-right corner and check the box beside "Don't import rows in unmatched columns."

After you've mapped all the columns from your file, click "Next."

On the details screen, click the "Import name" field to enter a name for your import.

If you've turned on General Data Protection Regulation, or GDPR, functionality in your account, use the "Set the legal basis for processing a contact's data" dropdown menu to select a lawful basis of processing.

Once you've set the options for your import, navigate to the bottom-right and click "Finish import."

Now you can go see how your data is associated inside of HubSpot. Navigate to your top main navigation and select "Sales" and "Deals". Here you can navigate to the Deal or Deals you imported with the associated "Contacts".

And there you have all of your data imported and with its associations built right in!

Video 6: How do you view recently imported data?

Now that you've imported your data, you can view your newly imported data in two ways. First, you can view the newly imported records from the main screen of whatever record type you imported (in this example, that would be the main contacts screen).

Secondly, you can view the newly updated properties from the individual record (in this example, that would be the contact record).

So let's walk through the first method. In the top navigation menu, click "Contacts" and then "Contacts" to see your newly imported contacts. If you imported a different record type, such as companies, deals, or tickets, you'd follow the same process to access those main screens by selecting the appropriate object in the main navigation menu.

Now for the second method: After navigating to the main contacts screen, click the name of a contact that you want to view to access the contact record. If you imported a different record type, such as companies, deals, or tickets, you'd follow the same process by accessing the appropriate main screen and clicking the name of the company, deal, or ticket you wish to see the record of.

On the left-hand side, navigate to the "About" section. Select "View all properties" to view all the properties available. On the right-hand side, use the search bar at the top to search for one of the properties you updated via the import. Hover over the property, and on the right, you'll see a button called "Add to About." Click this button to add this information to your contact's "About" section to easily view the data you've recently imported.