

# GUIDE TO ANSWER THE COMMON QUESTIONS THAT ARE ASKED IN HUBSPOT





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# **15 Common HubSpot Questions**

\*Certain features require specific permissions to accomplish



#### 1 What's the first thing I should do in HubSpot? 🗹

Integrate your email. This is done in 2 steps: Inbox connection & Email extension. Inbox Connection: Click the settings icon (gear). Integrations > Email integrations. Click Connect an inbox. Select your email provider. Follow set-up instructions. When finished Click Install add-in or Install extension. Follow instructions for set-up.

#### 2 How do I record and track emails?

Connect and integrate your email (see question #1) For Outlook: Click Sales Tools > Add-in Settings > Log and track settings Toggle the **Log** and **Track** settings off. For Gmail: In the New Message window, uncheck **Log** and **Track**.

#### 3 How do I automatically associate my contacts 🕜 with their correct companies?



Click settings. (gear icon) On the left menu - select **Contacts & Companies**. Click the 2nd **Companies** tab. Toggle "Automatically create and associate companies with contacts" off.



# 4 How do l customize HubSpot for my business? 🖸



Customize the deal pipeline to match your sales pipeline. Click Settings (gear icon – top right). In the left menu – Click Sales > Deals. Click on the default **Sales Pipeline** (rename by clicking the pencil icon). Change the stages of the default pipeline and the win probability percentage.



In the main navigation Click **Contacts > Contacts > Create contact** (far right button).

How can I delete a contact permanently?

(This requires certain permissions to accomplish.) In the main navigation, Click **Contacts > Contacts**. Select the contact(s) by clicking the box to the left of the contact name. Once selected, click **permanently delete** at the top.

#### How do I quickly get my data into HubSpot?

The fastest way is to import your data. If you are importing Contacts, go to Contacts > Contacts. On the right side, **click Import.** HubSpot provides information on How to prepare your Spreadsheet and Importing FAQs.





HubSpot can import CSV, XLS or XLSX files?



# 9 How do I find a certain group of contacts



To find a certain group of contacts, Use filters: In the main navigation: Select **Contacts > Contacts**. In the contact list: Click + Add filter and select a filter to find a certain group of contacts.

#### 10 How can I add a HubSpot user to 🛛 🗃 my team in HubSpot?

Click the Settings (gear icon – top right). In the left menu: select Users & Teams. Top right button: Create User. Enter email > Choose permission level and send HubSpot invitation.

# 💶 How do I delete a deal in HubSpot? 🔳

In the main navigation: Click Sales > Deals > Select the deal by checking the box to the left of the deal name. Once selected Click **Delete Permanently** in the top menu navigation.

#### 12 Where can I add my email signature 🛛 🗹 in HubSpot?

Click your company name/your name (top right). In the dropdown menu: Click Profile & Preferences > Edit Signature (at bottom in - CRM Communication).





Snippets are reusable short text blocks that save time when composing emails.

In the main navigation: Click **Conversations > Snippets > Create Snippet Name** the snippet (this is the internal name).

**Text Snippet** enter the response you would like to send.

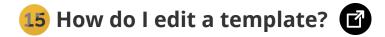
**Shortcut** the single word you'll use to active and insert the snippet using after the #.

Save the snippet.

# 💶 How do l create an email template in HubSpot? 🔳



In the main navigation: go to **Conversations > Templates** Click **New Templates PRO TIP**: Check the HubSpot template library for suggestions/ideas. **Name** – this I the internal name of the template. Subject – subject line of the email. Save the template.



In the main navigation: go to **Conversations > Templates** Click on the **Name** of the template you wish to edit.

