GUIDE TO ANSWER THE COMMON QUESTIONS THAT ARE ASKED IN HUBSPOT

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 I 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.

5 How do I manually add a contact?

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

6 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.

7 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.**

8 What file formats can I import?

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.

11 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).

13 What is a snippet in HubSpot?

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.

14 How do I 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.

15 How do I edit a template?

In the main navigation: go to **Conversations > Templates**

Click on the **Name** of the template you wish to edit.