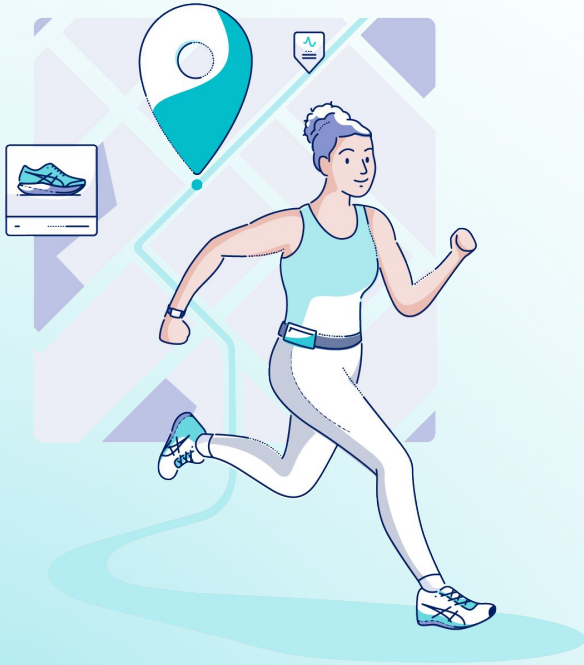




HubSpot Admin and Property Creation Tools Training

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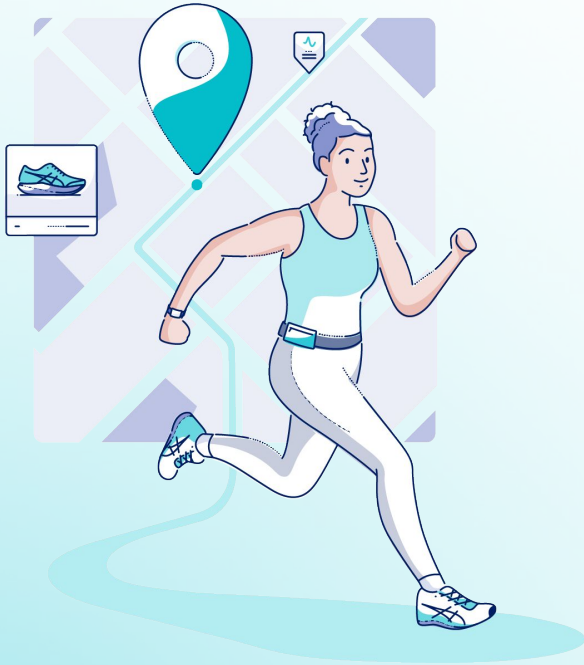
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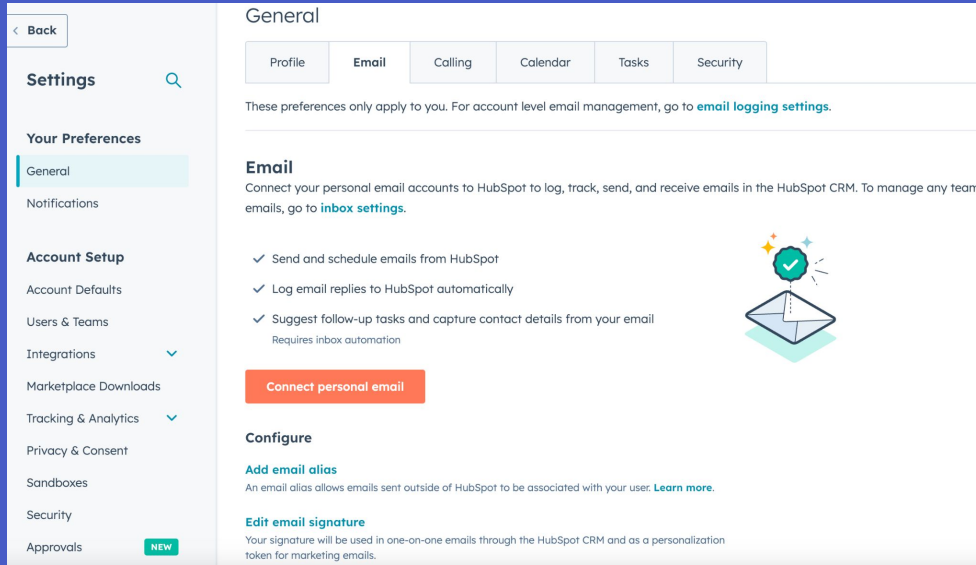
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Email Admin Settings

- Within the email admin settings, you are able to configure:
 - **The global email footer content**, email branding, personalization tokens, and RSS date and times
 - **Email subscription settings**, such as preference pages, compliance settings, resubscription email settings, and more
 - **Subscription types** that you can allow contacts to subscribe to and associate specific emails with (i.e. “Marketing Information”, “Event Information”, etc.)
 - **Tracking settings**. where you can set where and how you’d like to track specific email activity
 - **Send frequency settings**, which allow you to set a cap of how many emails a contact should receive within a specific time period

The screenshot displays the 'Email Admin Settings' interface. On the left is a navigation sidebar with categories: 'Data Management' (Properties, Objects, Import & Export), 'Tools' (Meetings, Calling, Inbox, Marketing), and 'Email' (Ads, Email, SMS, Forms, Social). The 'Email' section is selected. The main content area is titled 'Email' and has tabs for 'Configuration', 'Subscriptions', 'Subscription Types', 'Tracking', 'SMTP', and 'Send Frequency'. The 'Configuration' tab is active, showing options for 'Footer', 'Branding (Classic Editor)', 'Personalization', and 'RSS date and times'. Below this, it states 'These settings will be applied to all email types.' The 'Footer' section shows a list of footer items, with 'Race Roster (default)' selected. The content of this footer is 'Race Roster 186 York St London ON Canada N5X 3R9 226-234-5062'. There are 'Edit', 'Make default', and 'Delete' buttons for this footer. At the bottom, there is a '+ Add a footer' button.

Email Connection

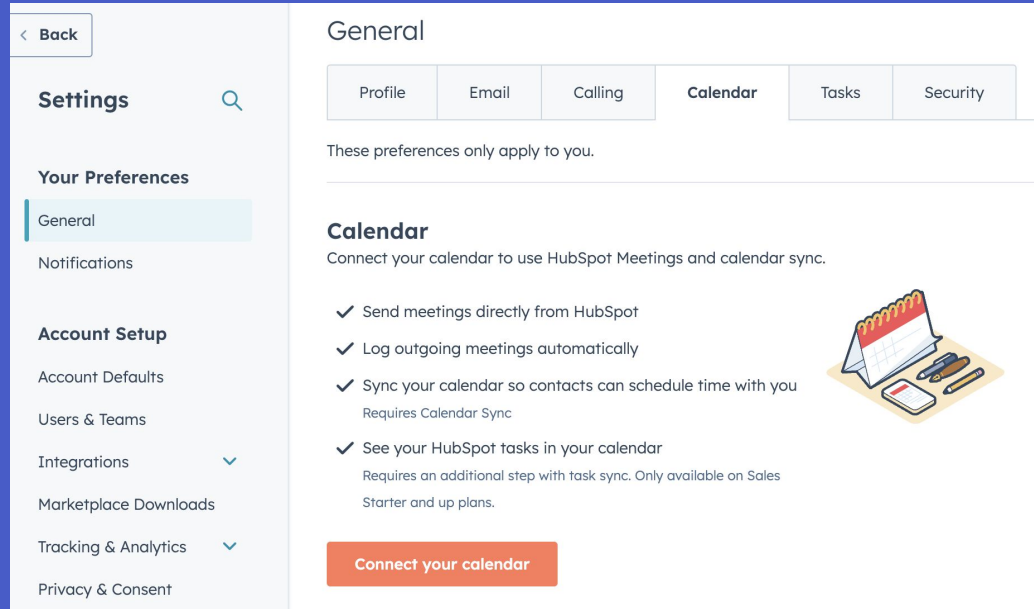


The screenshot shows the HubSpot Settings interface. On the left is a sidebar with categories: Settings, Your Preferences (General, Notifications), Account Setup (Account Defaults, Users & Teams, Integrations, Marketplace Downloads, Tracking & Analytics, Privacy & Consent, Sandboxes, Security, Approvals), and a 'NEW' badge. The main content area is titled 'General' and has tabs for Profile, Email, Calling, Calendar, Tasks, and Security. Below the tabs, a note states: 'These preferences only apply to you. For account level email management, go to [email logging settings](#).' The 'Email' section is active, with a sub-header 'Email' and a description: 'Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage any team emails, go to [inbox settings](#).' There are three checked items: 'Send and schedule emails from HubSpot', 'Log email replies to HubSpot automatically', and 'Suggest follow-up tasks and capture contact details from your email' (with a sub-note 'Requires inbox automation'). An orange button labeled 'Connect personal email' is present. Below this is a 'Configure' section with two options: 'Add email alias' (with a sub-note 'An email alias allows emails sent outside of HubSpot to be associated with your user. [Learn more](#).') and 'Edit email signature' (with a sub-note 'Your signature will be used in one-on-one emails through the HubSpot CRM and as a personalization token for marketing emails.'). An illustration of an envelope with a checkmark and stars is on the right.

- You also have the ability to connect your personal email to your HubSpot account to log, track, send, and receive emails in the HubSpot CRM
- You can also configure:
 - Your email alias
 - Your email signature
 - Inclusion of an “unsubscribe” link in your email
 - Never Log, which allows you to add a list of email domains that you would not like HubSpot to create a new contact record from when you email them
- You’ll also have the option to install HubSpot’s email extension tool to work alongside your email provider to track email activity between you and new/existing contacts

Calendar Connection

- You also have the option to connect your personal business calendar to your HubSpot account, which allows you to:
 - Sync meetings created in HubSpot to your calendar
 - Sync your calendar to allow contacts to schedule meetings on your calendar, while preventing them from booking meetings over existing calendar events
 - Sync and view HubSpot tasks within your calendar
 - Customize your meeting schedule page and URL
 - Include a meeting link to your live chat profile



The screenshot shows the HubSpot Settings interface. On the left is a navigation sidebar with a 'Back' button and categories: 'Settings' (with a search icon), 'Your Preferences' (containing 'General' which is highlighted), 'Account Setup' (containing 'Account Defaults', 'Users & Teams', 'Integrations', 'Marketplace Downloads', 'Tracking & Analytics', and 'Privacy & Consent'), and 'Notifications'. The main content area is titled 'General' and has tabs for 'Profile', 'Email', 'Calling', 'Calendar', 'Tasks', and 'Security'. Below the tabs, it states 'These preferences only apply to you.' The 'Calendar' section is active, showing a list of preferences with checkmarks: 'Send meetings directly from HubSpot', 'Log outgoing meetings automatically', 'Sync your calendar so contacts can schedule time with you' (with a sub-note 'Requires Calendar Sync'), and 'See your HubSpot tasks in your calendar' (with a sub-note 'Requires an additional step with task sync. Only available on Sales Starter and up plans.'). An orange button labeled 'Connect your calendar' is at the bottom. An illustration of a calendar and pens is on the right.



Custom Property Creation

Settings

Your Preferences

General

Notifications

Account Setup

Account Defaults

Users & Teams

Integrations

Marketplace Downloads

Tracking & Analytics

Privacy & Consent

Sandboxes

Security

Approvals NEW

Data Management

Properties

Objects

Contacts

Properties

[Data Quality](#) [Export all properties](#)

Properties are used to collect and store information about your records in HubSpot. For example, a contact might have properties like First Name or Lead Status.

Select an object: Contact properties [Go to contacts settings](#)

Properties (216) Conditional property logic Groups Archived Properties (0)

Search properties All groups All field types All users All access [Create property](#)

<input type="checkbox"/>	NAME <input type="text"/>	PROPERTY ACCESS <input type="text"/>	GROUP <input type="text"/>
<input type="checkbox"/>	Annual Revenue Single-line text	Everyone can view and edit	Contact information
<input type="checkbox"/>	Average Pageviews Number	Everyone can view and edit	Web analytics history
<input type="checkbox"/>	Became a Customer Date Date picker	Everyone can view and edit	Contact information
<input type="checkbox"/>	Became a Lead Date Date picker	Everyone can view and edit	Contact information
<input type="checkbox"/>	Became a Marketing Qualified Lead Date Date picker	Everyone can view and edit	Contact information

HubSpot Contact Properties Overview

- You can access the contact properties by going to “Settings” > “Data Management” > “Properties”
 - Make sure that the “Select an object” dropdown is set to “Contact properties”
- From here you can see a full list of created properties, their access settings, the property group they are in, and more
- You can also search for specific properties or filter them based on the group, field type, by user, and by access
- You can also see the properties that are used for conditional property logic, the different types of property groups, and properties that have been archived via the tabs above the list of properties

How to Create a New Contact Property

- To create a new property, click the orange “Create property” button near the top right of the property list
- From the pop-up menu, choose the type of property you’d like to create (in this case, “Contact”) and the group you’d like to associate the property with (usually “Contact information”)
- Add a label to the new property, as well as a description that explains what the property is

Create a new property ✕

BASIC INFO FIELD TYPE RULES

Object type *

Contact ▼

Group *

Contact information ▼

Label *

Contact Type </>

Description

Description of the type of contact

Cancel Next >



Contact Type

Field type

Select field type ▼

Text input

- Single-line text
- Multi-line text
- Phone number

Choosing options

- Single checkbox
- Multiple checkboxes
- Dropdown select
- Radio select
- Date picker

Values

- Number

Different Types of Properties

- There are a variety of field types you can choose from when creating your new property. These include:
 - Text input
 - Single-line text
 - Multi-line text
 - Phone number
 - Choosing options
 - Single checkbox
 - Multiple checkboxes
 - Dropdown select
 - Radio select
 - Date picker
 - Values
 - Number
 - Calculation
 - Score
 - Other
 - Property Sync
 - File
 - HubSpot user
 - Rich text
- Always think over and ensure you choose the correct field type for your property depending on its use case
- You can find more information on these different field types in this [HubSpot Knowledge Base article](#)

Adding Values to a Property

- Depending on the property type you've chosen (i.e. "Dropdown select", "Radio select", etc.), you may need to input values for your property
- You can add new values by clicking the "Add an option" button at the bottom left corner of the current values list
- You can delete a value by checking the box next to the value you'd like to delete, and then click "Delete" near the top of the list
- You can sort the list of values via the "Sort" dropdown select above the list of values
- You can quickly import a list of values by clicking "Load Options" > "Paste in your own options"
 - You can also copy options from other dropdown properties by clicking "Load Options" > "Copy from property"
- HubSpot also allows you to load a list of default options (such as "Country", "Day of the week", etc.) by clicking "Load Options" and then selecting one of the options from the "Load options" dropdown list

The screenshot shows the 'Create a new property' interface in HubSpot. At the top, there's a progress bar with three steps: 'BASIC INFO' (checked), 'FIELD TYPE' (current step), and 'RULES'. The property name is 'Contact Type'. Below the progress bar, there's a 'Field type' dropdown menu set to 'Multiple checkboxes'. There are also 'Sort' and 'Search' dropdowns. The main area contains a table with columns for 'LABEL', 'INTERNAL VALUE', and 'IN FORMS'. The table lists four values: 'Interested', 'Spectator', 'Participant', and 'Volunteer', each with a checkbox and a toggle switch. At the bottom, there are 'Back', 'Cancel', and 'Next' buttons.

	LABEL	INTERNAL VALUE	IN FORMS
<input type="checkbox"/>	Interested	Interested	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Spectator	Spectator	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Participant	Participant	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Volunteer	Volunteer	<input checked="" type="checkbox"/>

When to Create a New Property

- When the property does not already exist as part of HubSpot's default properties
- When your company tracks specific data that is not always common with other types of companies
- If you're planning on integrating this information with another system outside of HubSpot
- **Remember:** more is not better, only create properties you truly need and be conscious of what you make required. Too many required fields can cause friction and therefore make it tougher to get user adoption

WM Joe Smith
Owner at Waste Management, Inc.
joe@wastemanagement.com

Note Email Call Task Meeti... More

About this contact Actions

- First name: Joe
- Last name: Smith
- Email: joe@wastemanagement.com
- Phone number
- Street address
- City
- State/Region
- Country/Region

Actions menu:

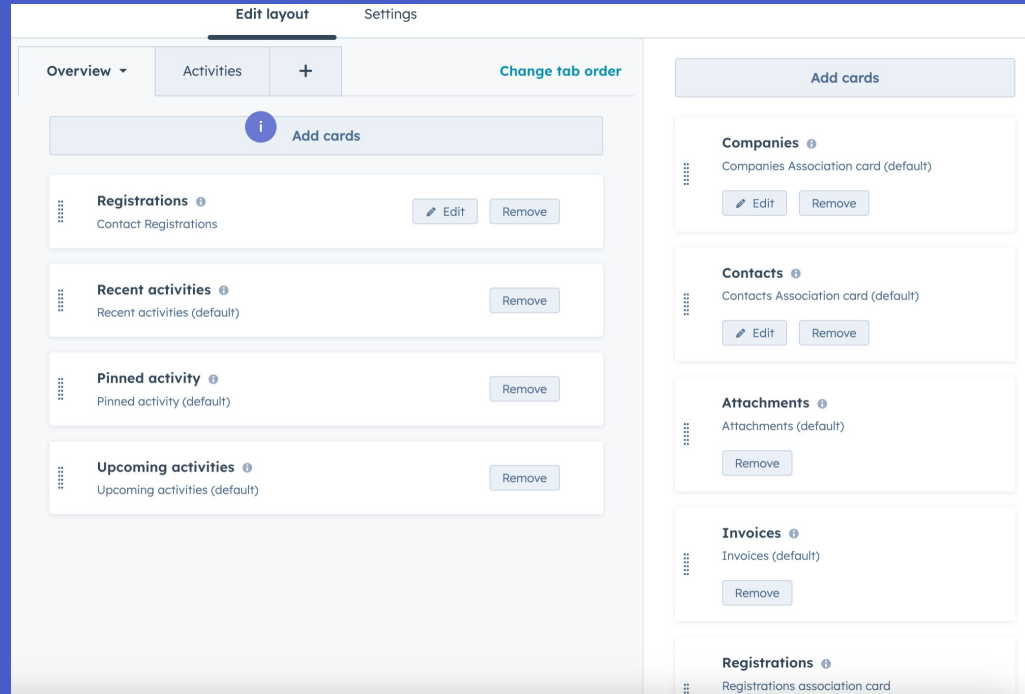
- Customize Properties
- View all properties
- View property history

How to Edit Property View in a Contact Record

- First, navigate to a contact record you'd like to view
- Once in the contact record, in the "About this contact" section on the left navigation, click the "Actions" dropdown and then click "Customize Properties"
- From the menu that appears on the right side, you can:
 - Edit the placement of properties
 - Add new properties via the "Add properties" dropdown menu
 - Remove properties
 - Reset the list of properties to the system default

Edit the Middle and Right Sections of a Contact Record

- You can also customize the middle and right-hand sections of a contact record in terms of card placement and information associated with those cards
- To do this, navigate to the HubSpot settings and then on the left hand menu navigate to “Data Management” > “Objects” > “Contacts” > “Record Customization”
- You’ll then have the ability to customize the default view for a contact record, or create a new custom team view which can then be assigned to a HubSpot team
- **Note that any updates made to the “Default view” will be applied to all HubSpot users**



How to View/Manage All Properties for a Contact

- First, navigate to a contact record you'd like to view
- Once in the contact record, in the “About this contact” section on the left navigation, click the “Actions” dropdown and then click “View all properties”
- You will be taken to a new page where you can view all of the property information for that specific contact within the different property groups

The screenshot shows a user interface for managing properties for a contact named Joe Smith. At the top left, there is a back arrow and the text 'Back'. The main heading is 'Manage properties for Joe Smith'. Below this, the text 'All properties' is displayed on the left, and a 'Manage properties' button is on the right. A search bar with the placeholder text 'Search properties' and a magnifying glass icon is positioned below the heading. To the right of the search bar is a checkbox labeled 'Hide blank properties'. The main content area lists four property groups, each with a chevron icon and a count of properties: 'Sales properties' (6 properties), 'Contact activity' (23 properties), 'Deal information' (8 properties), and 'Contact information' (69 properties). The 'Contact information' group is expanded, showing a list of properties: 'Annual revenue', 'Became a customer date', '--', and 'Became a lead date'.

How to View Property History

[Back](#)

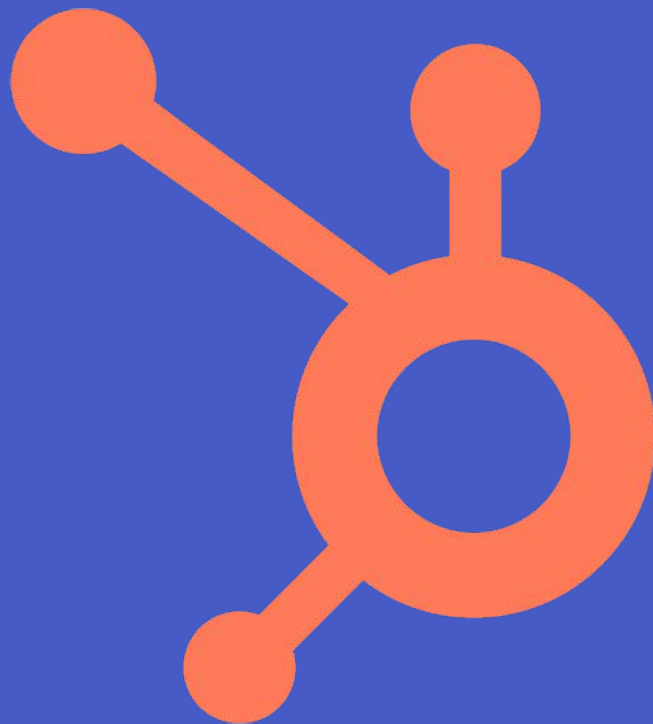
Property history for Joe Smith

PROPERTY	CHANGED TO	MADE ON	SOURCE
Last modified date	05/13/2024 7:46 AM PDT	5/13/2024 at 7:46 AM PDT	HubSpot Calculation
Last modified date	05/13/2024 7:45 AM PDT	5/13/2024 at 7:45 AM PDT	HubSpot Processing
Latest Source Date	05/13/2024 7:45 AM PDT	5/13/2024 at 7:45 AM PDT	Analytics
Latest Source Drill-Down 2	Julia Trovato	5/13/2024 at 7:45 AM PDT	Analytics
Latest Source Drill-Down 1	CRM_UI	5/13/2024 at 7:45 AM PDT	Analytics
Latest Source	Offline sources	5/13/2024 at 7:45 AM PDT	Analytics

- First, navigate to a contact record you'd like to view
- Once in the contact record, in the "About this contact" section on the left navigation, click the "Actions" dropdown and then click "View property history"
- From here, you will be able to see a full list of updates made to specific properties, including what the change was, when the change was made, and by who/what

Additional HubSpot Resources

- [Manage your default marketing email settings and tracking preferences](#)
- [Connect your personal email](#)
- [Connect your calendar to HubSpot](#)
- [Property field types in HubSpot](#)
- [HubSpot's default contact properties](#)
- [Create and edit properties](#)
- [Create calculation properties](#)
- [Organize, delete, and export properties](#)
- [Customize records](#)



Thank you

Forms Admin Settings

- In the forms admin settings, you are able to configure:
 - The form styling of all forms, including
 - Font family
 - Label color/size
 - Button color/size
 - Submission settings, such as allowing submissions without email addresses to create contacts
 - Non-HubSpot form settings, allowing you to choose whether or not to collect contact information from non-HubSpot forms

The screenshot displays the HubSpot Forms Admin Settings interface. On the left is a navigation sidebar with sections: Settings, Your Preferences (General, Notifications), Account Setup (Account Defaults, Users & Teams, Integrations, Marketplace Downloads, Tracking & Analytics, Privacy & Consent, Sandboxes), Security (Approvals), and Data Management. The main content area is titled 'Forms' and has three tabs: 'Styles' (selected), 'Submissions Settings', and 'Non-HubSpot Forms'. A descriptive paragraph states: 'Update the colors and fonts for HubSpot forms that you've embedded on external websites. These settings won't affect your pop-up forms or non-HubSpot forms that are sending data to HubSpot. [Learn more](#)'. Below this, the 'All forms' section is divided into 'Text' and 'Button' settings. Under 'Text', 'Font family' is set to 'Helvetica', 'Label color' is '#212d3a' with a black circle, and 'Size' is '16'. Under 'Button', 'Color' is '#f7a59' with an orange circle, and 'Alignment' is 'Left'. A 'Font color' section shows a white circle with '#ffffff'. A 'PREVIEW' section shows a form with fields for 'First name', 'Email', and 'City', and an orange 'Submit' button. A 'Reset all styles' link is at the bottom left.

Social Admin Settings

- In the social admin settings, you are able to configure:
 - Which social accounts are connected to the HubSpot portal, along with viewing connection errors
 - Publishing schedule by day and time, “Publish with custom short link” settings, and more
 - Email notifications that show a round up of new interactions, conversations, and X followers, as well as other social stats
 - The “Follow me” set of social icons that allow website visitors to quickly view and follow your social accounts

