

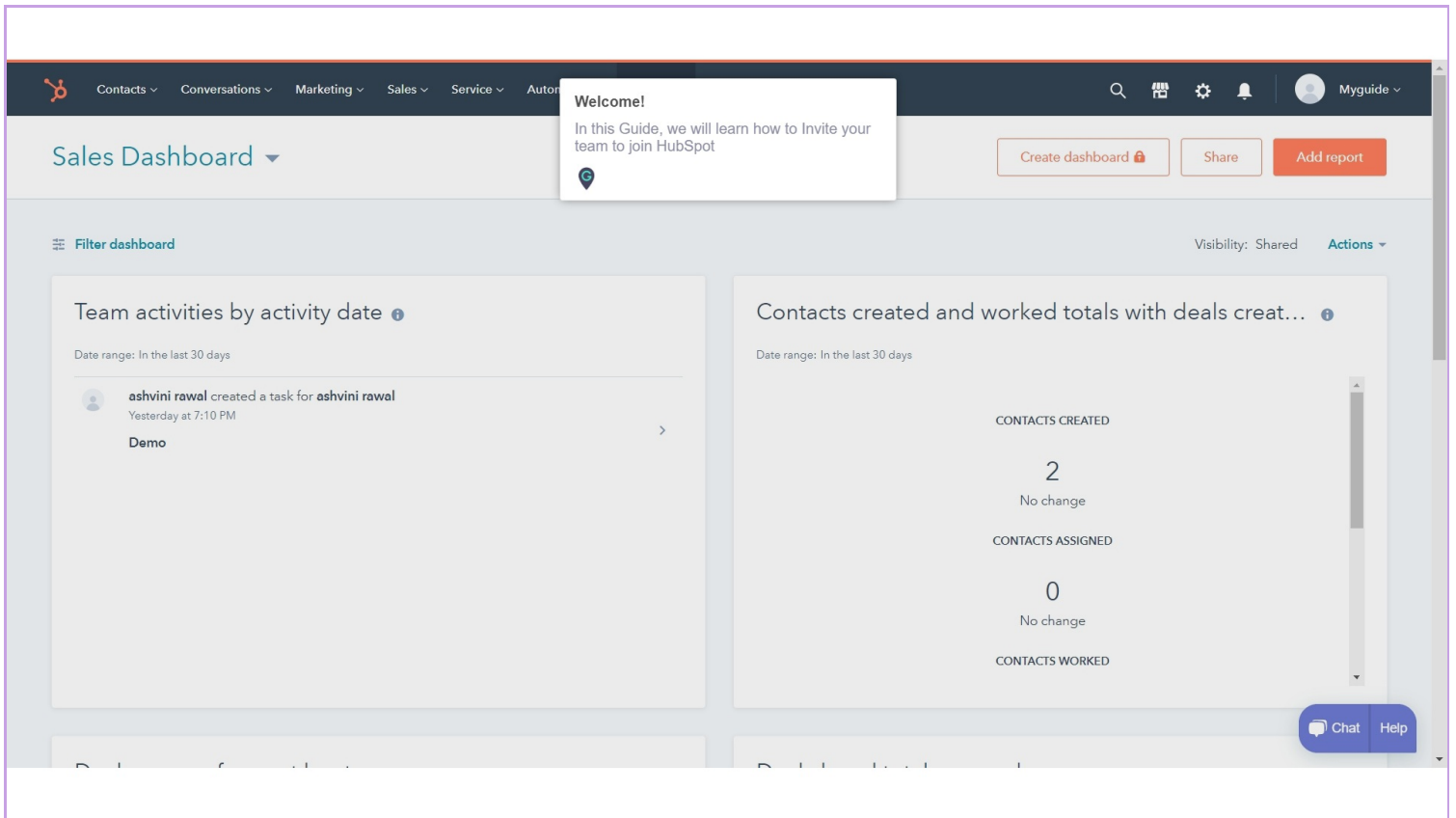


How to Invite your team to join HubSpot

Step: 01

Welcome!

In this Guide, we will learn how to Invite your team to join HubSpot



Step: 02

Click on "Myguide"

The screenshot displays the MyGuide Sales Dashboard. At the top, a dark navigation bar contains menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right side of this bar are icons for search, a grid, settings, notifications, and a user profile labeled 'Myguide'. Below the navigation bar, the page title is 'Sales Dashboard'. A 'Create dashboard' button is visible. A tooltip with a location pin icon points to the 'Myguide' user profile, with the text 'Click on "Myguide"'. The main content area is titled 'Filter dashboard' and includes a 'Visibility: Shared' indicator and an 'Actions' dropdown. Two primary panels are shown: 'Team activities by activity date' (with a date range of 'In the last 30 days') and 'Contacts created and worked totals with deals creat...'. The first panel shows a recent activity by 'ashvini rawal' who created a task for 'ashvini rawal' yesterday at 7:10 PM. The second panel shows summary statistics: CONTACTS CREATED (2, No change), CONTACTS ASSIGNED (0, No change), and CONTACTS WORKED. A 'Chat' and 'Help' button is located in the bottom right corner of the dashboard area.

Step: 03

Click on "Set up your HubSpot account"

The screenshot displays the HubSpot Sales Dashboard interface. At the top, there is a navigation bar with various menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. A search icon and a 'Myguide' user profile icon are also present. Below the navigation bar, the main dashboard area is titled 'Sales Dashboard' and includes a 'Create dashboard' button. A 'Filter dashboard' button is located on the left side. The dashboard is divided into several sections. On the left, there is a 'Team activities by activity date' section showing a recent activity by 'ashvini rawal'. In the center, there is a 'Contacts' section with a date range filter. On the right, there is a user profile card for 'ashvini rawal' with a 'Profile & Preferences' link. Below the profile card, there is a 'Myguide' section with a progress bar for 'Set up your HubSpot account' at 0%. A callout box with a location pin icon is overlaid on the 'Contacts' section, containing the text 'Click on "Set up your HubSpot account"'. Below the callout box, there are three summary cards: 'CONTACTS CREATED' with a value of 2 and 'No change', 'CONTACTS ASSIGNED' with a value of 0 and 'No change', and 'CONTACTS WORKED'. At the bottom right, there are 'Chat' and 'Help' buttons.

Step: 04

Click on "Invite team" option inside "Set up team for success" section

The screenshot displays a setup guide interface with two main sections. The first section, 'Set up your ticketing process', includes tasks like 'Learn: How to capture the right ticket details' and 'Create a ticket'. The second section, 'Set up your team for success', includes 'Invite your team to HubSpot', 'Create a reusable snippet', and 'Add the 'Average Time to Respond Over Time' report to your dashboard'. A callout box highlights the 'Invite team' button in the 'Set up your team for success' section.

Section	Task	Duration	Action
Set up your ticketing process <small>Takes about 10 minutes</small>	Learn: How to capture the right ticket details. <small>And gather the information that your business needs.</small>		Learn more
	Create a ticket <small>Keep on top of every customer issue</small>		Create ticket
Set up your team for success <small>Takes about 15 minutes</small>	Invite your team to HubSpot <small>Get everyone working from the same data.</small>		Invite team
	Create a reusable snippet <small>Stop writing the same responses over and over.</small>		Create snippet
	Add the 'Average Time to Respond Over Time' report to your dashboard <small>Know how you're doing and where to improve</small>		Add report

Step: 05

Add email address of the team member you wish to invite

Create users [X]

EMAIL PERMISSIONS INVITE

Create new users, one at a time.

Add a new user to your HubSpot account with an email address.

Add email address(es) [i]

[Input field]

Or create multiple users at once.

Create multiple users at once. Import their info from a file.

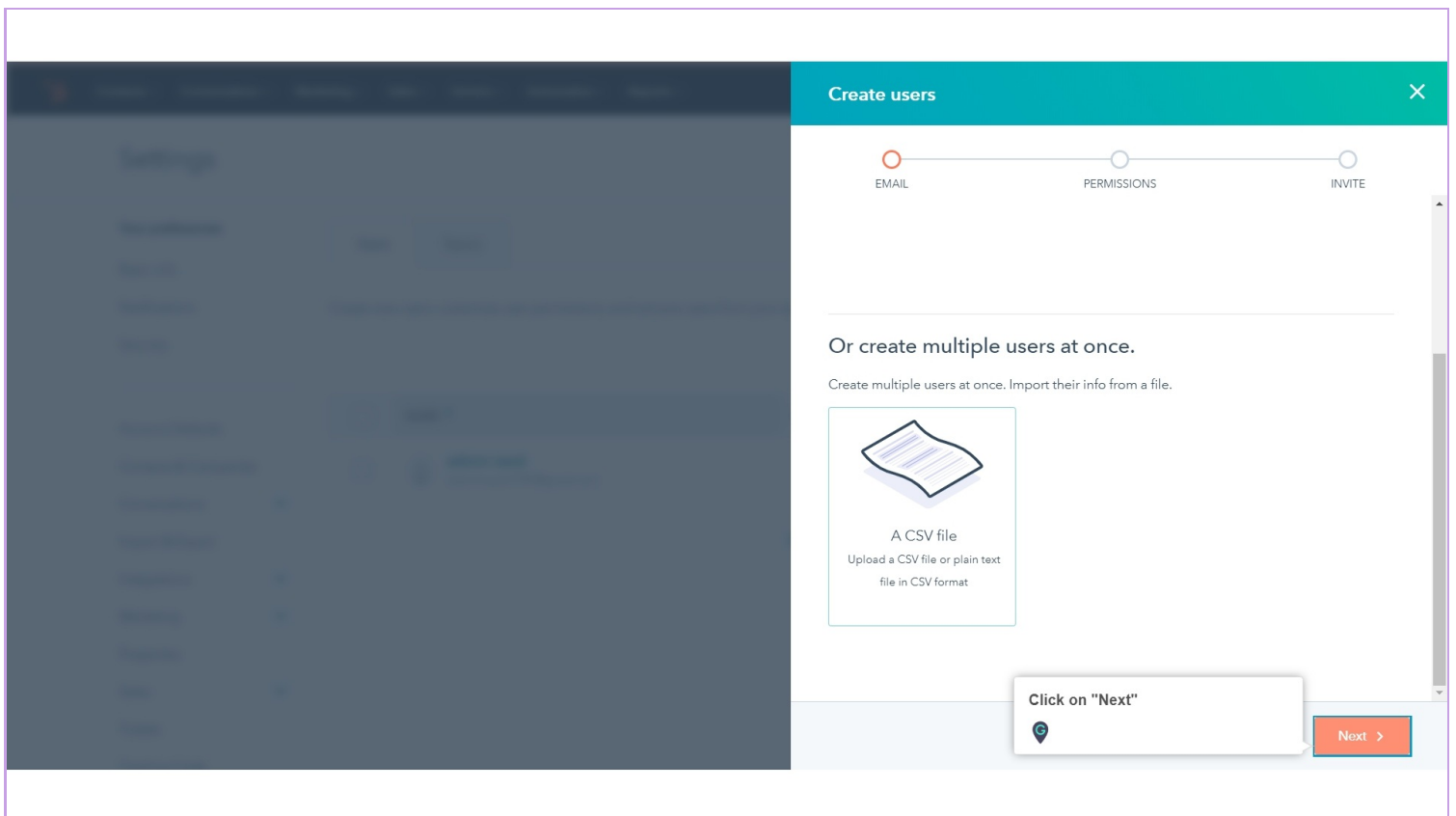
[File upload icon]

Next >

Add email address of the team member you wish to invite

Step: 06

Click on "Next"



Step: 07

Set "Contacts Access" permissions for the user

The screenshot shows the 'Create users' interface with a progress bar indicating the 'PERMISSIONS' step is active. The 'Team' is set to 'No team assigned'. Below the team selection, there are tabs for 'Contacts', 'Marketing', 'Sales', 'Service', and 'More'. The 'Contacts Access' section is highlighted, showing a list of permissions:

Permission	Description	Level
View	Control the set of contacts, companies, and tasks the u...	Everything
Communicate	Control the set of contacts and companies the user ca...	Everything
Edit	Control the set of contacts, companies, and tasks the u...	Everything

At the bottom of the interface, there are 'Back' and 'Next' buttons.

Step: 08

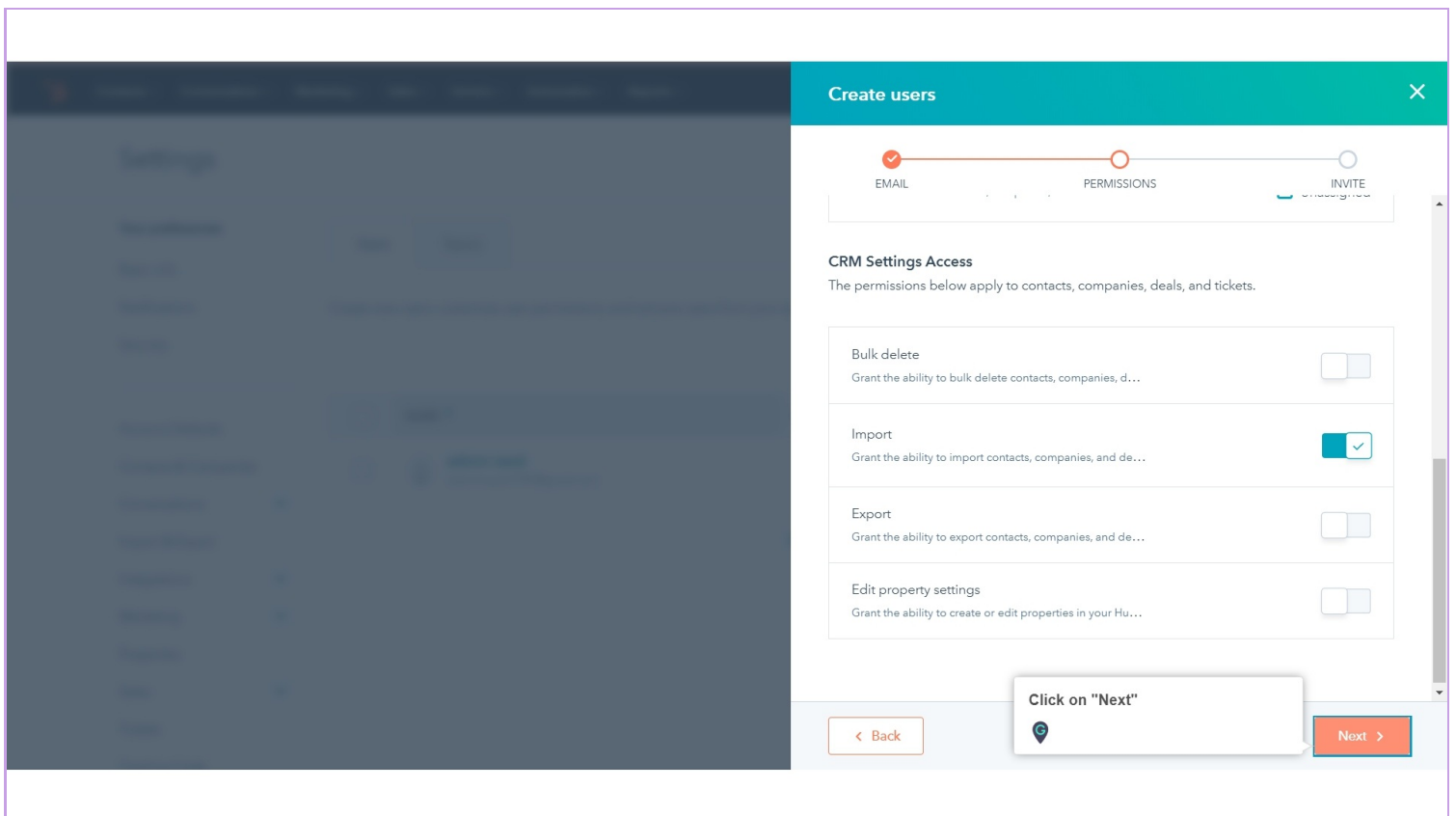
Set "CRM Settings Access" permissions for the user

The screenshot shows the 'Create users' interface with the 'PERMISSIONS' step selected. A callout box highlights the 'CRM Settings Access' permission, which is currently disabled. The interface includes a progress bar with 'EMAIL', 'PERMISSIONS', and 'INVITE' steps, and a list of permissions with toggle switches.

Permission	Description	Status
Bulk delete	Grant the ability to bulk delete contacts, companies, d...	Off
Import	Grant the ability to import contacts, companies, and de...	On
Export	Grant the ability to export contacts, companies, and de...	Off
Edit property settings	Grant the ability to create or edit properties in your Hu...	Off

Step: 09

Click on "Next"



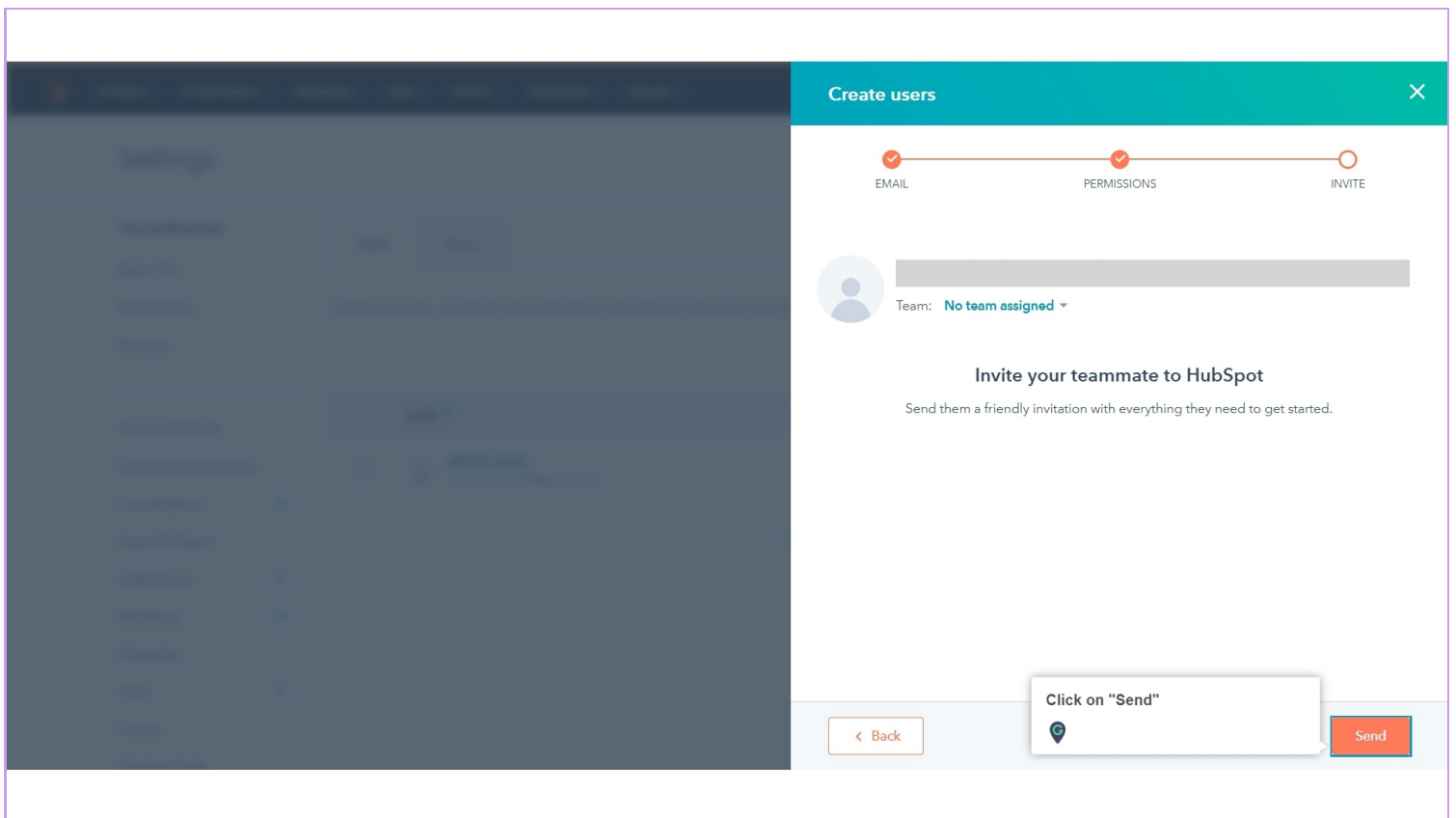
The screenshot displays the 'Create users' interface. At the top, a teal header contains the title 'Create users' and a close button. Below the header is a progress indicator with three steps: 'EMAIL' (completed), 'PERMISSIONS' (current step), and 'INVITE' (pending). The main content area is titled 'CRM Settings Access' and includes a sub-header: 'The permissions below apply to contacts, companies, deals, and tickets.' Below this, there are four permission settings, each with a toggle switch:

- Bulk delete**: Grant the ability to bulk delete contacts, companies, d... (toggle is off)
- Import**: Grant the ability to import contacts, companies, and de... (toggle is on and checked)
- Export**: Grant the ability to export contacts, companies, and de... (toggle is off)
- Edit property settings**: Grant the ability to create or edit properties in your Hu... (toggle is off)

At the bottom of the interface, there are two buttons: '< Back' and 'Next >'. A callout box with a location pin icon points to the 'Next >' button, containing the text 'Click on "Next"'. The left side of the interface is blurred.

Step: 10

Click on "Send"



The screenshot displays the HubSpot 'Create users' interface. At the top, a teal header contains the text 'Create users' and a close icon. Below the header is a progress bar with three steps: 'EMAIL' (completed with a red checkmark), 'PERMISSIONS' (completed with a red checkmark), and 'INVITE' (current step, indicated by a red circle). The main content area features a greyed-out sidebar on the left, a user profile icon, and a dropdown menu for 'Team' set to 'No team assigned'. Below this, the heading 'Invite your teammate to HubSpot' is followed by the instruction 'Send them a friendly invitation with everything they need to get started.' At the bottom, there are three buttons: '< Back', 'Send' (highlighted with a red border and a tooltip that says 'Click on "Send"'), and another 'Send' button.

Step: 11

User has been added!

The screenshot displays the 'Settings' page in the MyGuide application, specifically the 'Users' tab. A notification bubble at the top center reads 'User has been added!'. The left sidebar contains a navigation menu with categories like 'Your preferences', 'Account Defaults', and 'Marketing'. The main content area features a 'Create user' button and a table of existing users. The table has columns for 'NAME', 'TEAM', and 'ACCESS'. One user, 'ashvini rawal', is listed with 'Super Admin' access. A '25 per page' dropdown is visible below the table. At the bottom right, there are 'Chat' and 'Help' buttons.

<input type="checkbox"/>	NAME	TEAM	ACCESS
<input type="checkbox"/>	ashvini rawal		Super Admin
<input type="checkbox"/>	[Redacted]		Service Contacts Reports Sales Marketing

Thank You!

myguide.org