

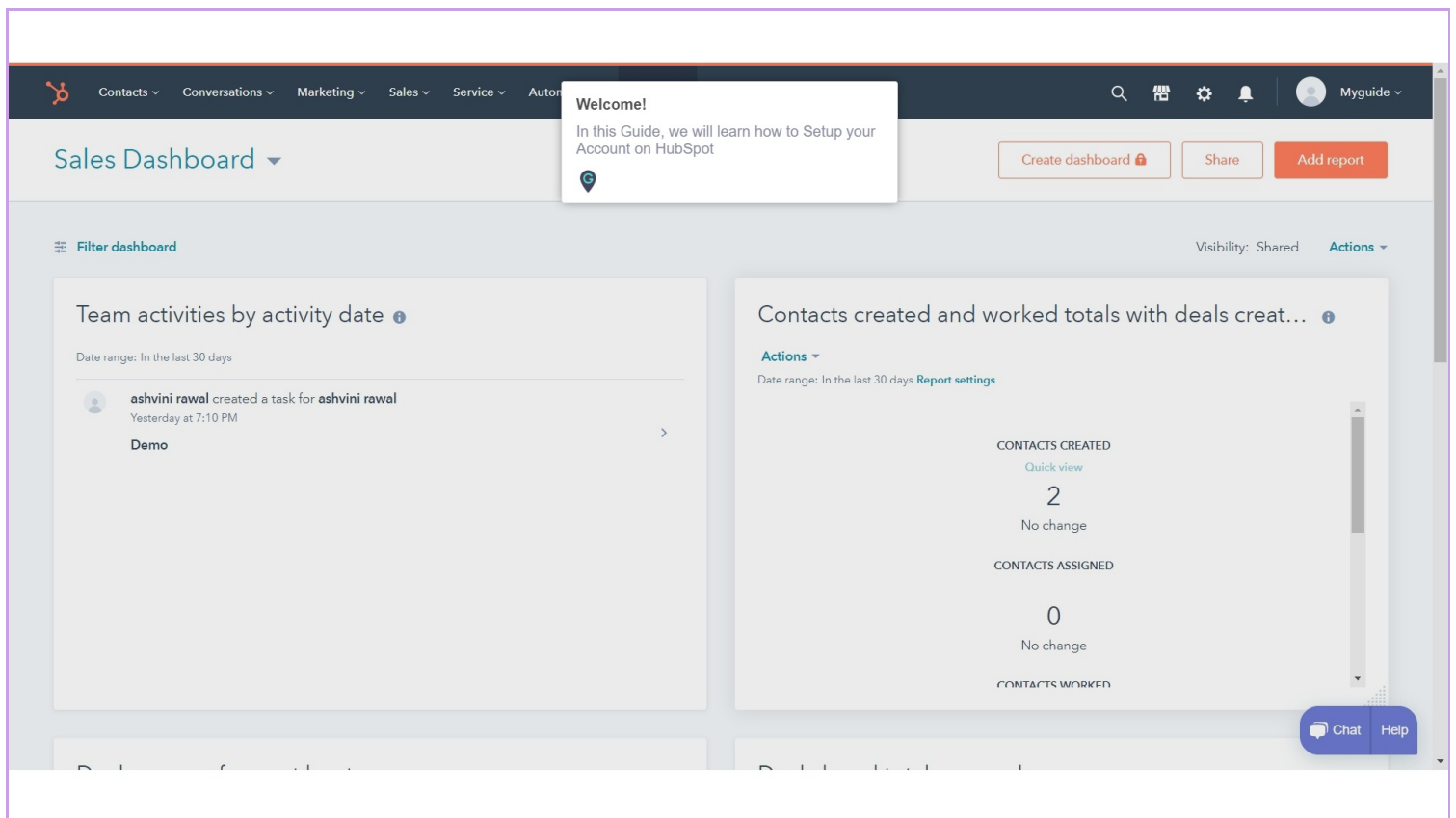


How to Setup your Account on HubSpot

Step: 01

Welcome!

In this Guide, we will learn how to Setup your Account on HubSpot



Step: 02

Click on "Myguide"

The screenshot displays the MyGuide Sales Dashboard. The top navigation bar contains the following menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right side of the navigation bar, there is a search icon, a grid icon, a settings icon, a notification bell icon, and a user profile icon labeled "Myguide".

The main content area is titled "Sales Dashboard" and includes a "Filter dashboard" button on the left and a "Create dashboard" button on the right. The dashboard is divided into two main sections:

- Team activities by activity date:** This section shows a date range of "In the last 30 days" and a single activity: "ashvini rawal created a task for ashvini rawal" on "Yesterday at 7:10 PM". Below the activity is a "Demo" button.
- Contacts created and worked totals with deals creat...:** This section shows a date range of "In the last 30 days" and the following statistics:
 - CONTACTS CREATED: 2 (No change)
 - CONTACTS ASSIGNED: 0 (No change)
 - CONTACTS WORKED: 0

A tooltip with the text "Click on 'Myguide'" and a location pin icon is overlaid on the user profile icon in the top right corner. At the bottom right of the dashboard, there are "Chat" and "Help" buttons.

Step: 03

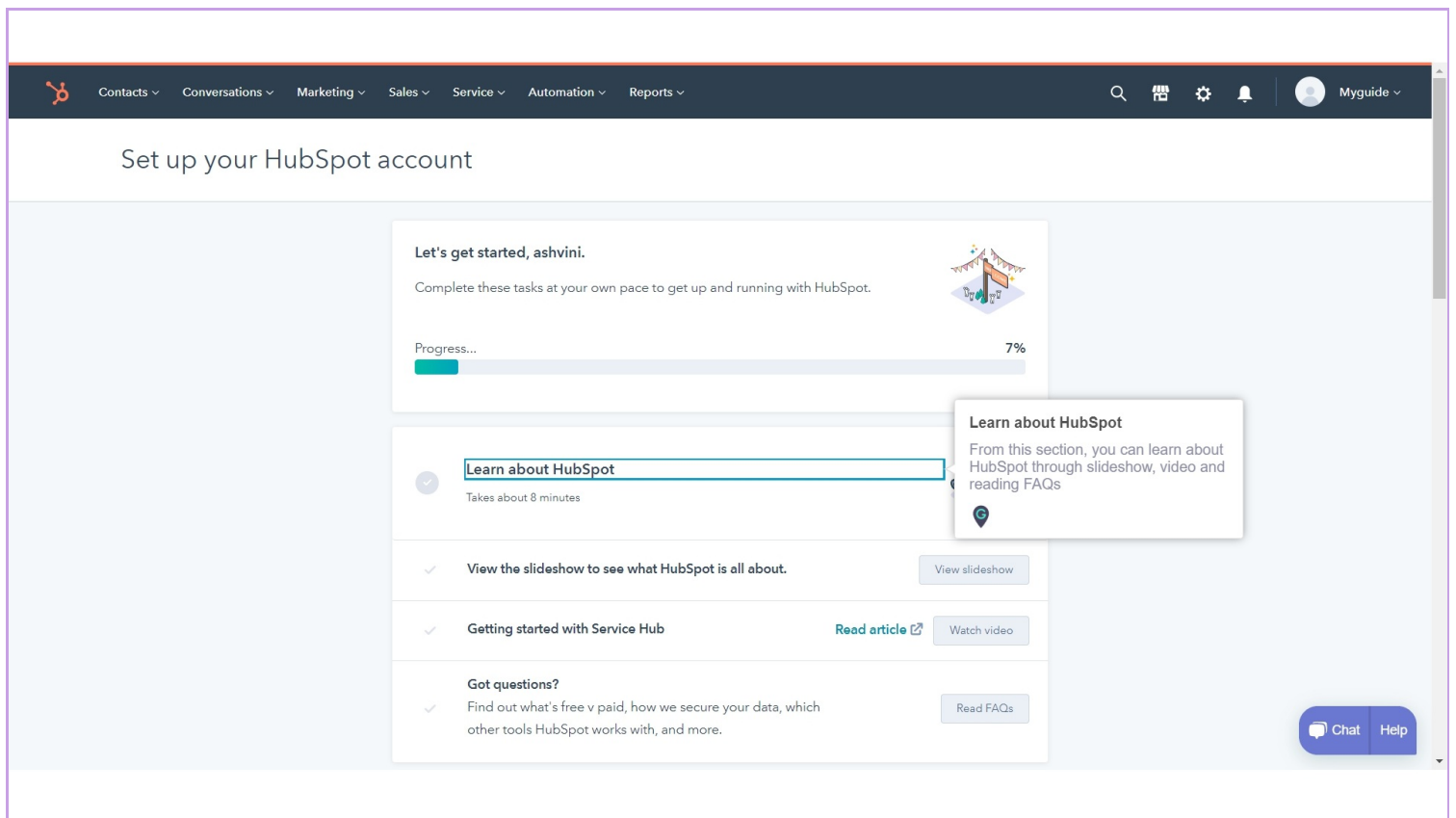
Click on "Set up your HubSpot account"

The screenshot displays the HubSpot Sales Dashboard interface. At the top, a navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main header shows 'Sales Dashboard' and a 'Create dashboard' button. On the left, a 'Filter dashboard' button is visible. The central area features a 'Team activities by activity date' widget showing a recent task created by 'ashvini rawal'. To the right, a 'Contacts' widget displays metrics: 2 CONTACTS CREATED, 0 CONTACTS ASSIGNED, and 0 CONTACTS WORKED. A callout box with a location pin icon points to the 'Set up your HubSpot account' link in the user profile dropdown menu. The profile menu also includes 'Profile & Preferences', 'Myguide 7097602', 'Account & Billing', 'HubSpot Academy', 'Pricing & Features', 'Training & Services', 'Sign out', and 'Privacy policy'. A 'Chat' and 'Help' button is located at the bottom right of the dashboard.

Step: 04

Learn about HubSpot

From this section, you can learn about HubSpot through slideshow, video and reading FAQs



Step: 05

Set up your customer communication channels

Here, you can set up your team inbox, live chat, add a support form to your website and create a bot as virtual assistant to handle queries

The screenshot shows a user interface for setting up customer communication channels. It features a list of tasks, each with a checkmark, a description, and a button to proceed. A callout box highlights the 'Set up your customer communication channels' task.

- Got questions?**
Find out what's free v paid, how we secure your data, which other tools HubSpot works with, and more. [Read FAQs](#)
- Set up your customer communication channels**
Takes about 13 minutes. [Set up your customer communication channels](#)
- Connect your team email to HubSpot**
Collaborate more efficiently. [Set up team inbox](#)
- Add live chat to your website**
Route visitors to the right team member. [Set up live chat](#)
- Add a support form to your website**
Every query creates a ticket. No manual entry. [Add form](#)
- Create a bot to take questions when you aren't around**
Get a virtual assistant to handle queries 24/7. [Create bot](#)
- Set up your ticketing process**
Takes about 10 minutes. [Set up ticketing process](#)
- Learn: How to capture the right ticket details.** [Learn more](#)

At the bottom right, there are 'Chat' and 'Help' buttons.

Step: 06

Set up your ticketing process

From here, you can create a ticket and learn how to capture the right ticket details

The screenshot shows a user interface for setting up a ticketing process. At the top, there is a header: "Get a virtual assistant to handle queries 24/7." Below this, there are two main sections. The first section is titled "Set up your ticketing process" and includes three sub-tasks: "Learn: How to capture the right ticket details" (with a "Learn more" button), "Create a ticket" (with a "Create ticket" button), and "Set up your team for success" (with a "Set up team" button). The second section is titled "Set up your team for success" and includes three sub-tasks: "Invite your team to HubSpot" (with an "Invite team" button), "Create a reusable snippet" (with a "Create snippet" button), and "Add the 'Average Time to Respond Over Time' report to your dashboard" (with an "Add report" button). A callout box on the right side of the screen contains the text: "Set up your ticketing process. From here, you can create a ticket and learn how to capture the right ticket details." In the bottom right corner, there are "Chat" and "Help" buttons.

Step: 07

Set up your team for success

You can Invite your team members to join HubSpot, create a reusable snippet to stop writing the same responses over and over and you can also add reports

The screenshot shows a checklist interface with the following items:

- Set up your ticketing process** (Takes about 10 minutes)
 - Learn: How to capture the right ticket details. (Learn more)
 - Create a ticket (Keep on top of every customer issue. Create ticket)
- Set up your team for success** (Takes about 15 minutes)
 - Invite your team to HubSpot (Get everyone working from the same data. Invite team)
 - Create a reusable snippet (Stop writing the same responses over and over. Create snippet)
 - Add the 'Average Time to Respond Over Time' report to your dashboard (Know how you're doing and where to improve. Add report)

A tooltip for the 'Set up your team for success' item contains the text: "You can Invite your team members to join HubSpot, create a reusable snippet to stop writing the same responses over and over and you can also add reports".

Step: 08

Automate your process

You can import your contacts and set up live chat routing for sending visitors to the right team members

The screenshot shows a checklist of setup tasks. The 'Automate your process' task is highlighted with a blue box and a tooltip. The tooltip text reads: 'Automate your process. You can import your contacts and set up live chat routing for sending visitors to the right team members'. The checklist items are:

- Set up your team for success** (Takes about 15 minutes) - Includes an 'Invite team' button.
- Create a reusable snippet** (Stop writing the same responses over and over.) - Includes a 'Create snippet' button.
- Add the 'Average Time to Respond Over Time' report to your dashboard** (Know how you're doing and where to improve) - Includes an 'Add report' button.
- Automate your process** (Takes about 3 minutes) - This item is highlighted. It includes a 'Route chat' button and a 'Read article' link.
- Import your contacts** (All your data in one place.) - Includes an 'Import contacts' button.
- Set up live chat routing** (Send visitors to the right team member.) - Includes a 'Route chat' button and a 'Read article' link.

At the bottom of the checklist, there is a link: 'Click [here](#) to skip setup and go to your dashboard.' In the bottom right corner, there are 'Chat' and 'Help' buttons.

Thank You!

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