



Contacts ▾Conversations ▾Marketing ▾Sales ▾Service ▾Automation ▾Reports ▾



Compose <<

All conversations48

Unassigned22

Email1

Chat47

Forms1

Tickets2

 Available ▾

 Inbox Settings

HubSpot

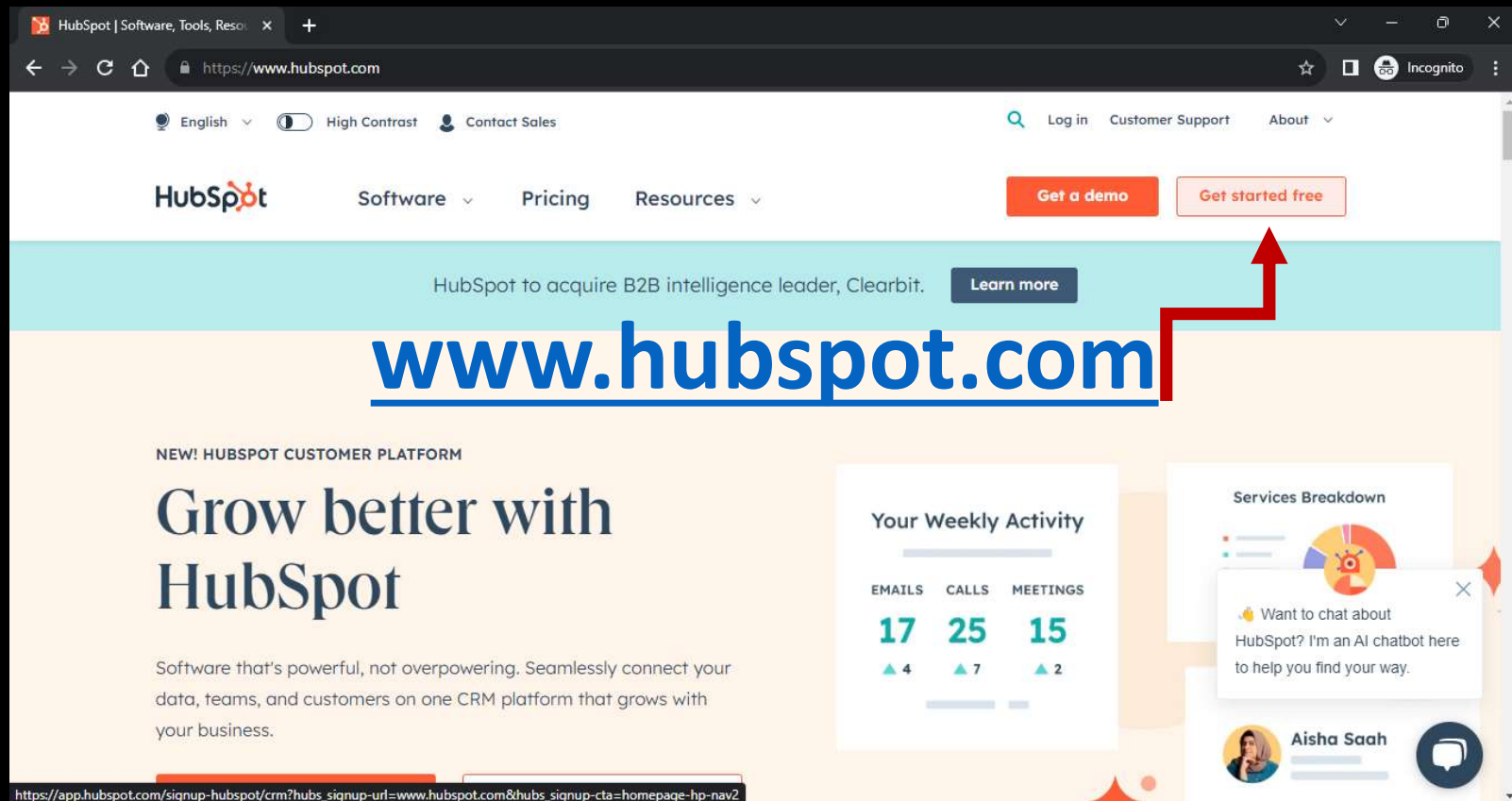
Setup & Integration with Adaptive Marketing Group, LLC

<<

Help

Adaptive Marketing Group | Email Marketing Campaigner | Hubspot Integration

Step 1 - Setting Up or login to a **FREE Hubspot.com CRM** Account



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Step 2 – See Menu Bar & **GEAR Box ICON** (follow arrow)

The screenshot shows the HubSpot user preferences page. A red arrow points from the 'GEAR Box ICON' in the top right corner to the 'Users & Teams' option in the left sidebar. Another red arrow points from the 'Users & Teams' option to the 'Setup' tab in the 'Contacts' section. The text '“Select Teams”' is written in red next to the second arrow. The URL at the bottom is <https://app.hubspot.com/user-preferences/44223005>.

“Select Teams”

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Step 3 – **CREATE USER**

The screenshot shows the HubSpot 'Users & Teams' management interface. On the left, the 'Settings' menu is open, with 'Users & Teams' highlighted under the 'Account Setup' section. The main content area shows the 'Users' tab, a notification banner about account setup, and a table of existing users. A red arrow points from the 'Create user' button in the top right to the 'Users & Teams' menu item, and another red arrow points from the 'Add new user' button to the 'Create user' button.

Settings

- Your Preferences
 - General
 - Notifications
- Account Setup
 - Account Defaults
 - Users & Teams**
 - Integrations
 - Marketplace Downloads
 - Tracking Code
 - Privacy & Consent
 - Security

Users | Teams

A few people haven't set up their accounts yet. [Review users](#)

Create new users, customize user permissions, and remove users from your account. [Learn more about user permissions](#)

[Invite](#) [Status](#) [Last Active](#) [Advanced filters \(0\)](#) [Add new user](#) [Create user](#)

Search name or email address

<input type="checkbox"/>	NAME	SEAT	ACCESS
<input type="checkbox"/>	parent@parent.com	--	Contacts
<input type="checkbox"/>		--	Super Admin
<input type="checkbox"/>		--	Super Admin

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Step 4 – Quick Invite

The screenshot displays the HubSpot 'Users & Teams' management interface. On the left, a sidebar menu under 'Settings' includes 'Your Preferences', 'Account Setup', and 'Users & Teams' (which is highlighted). The main content area has tabs for 'Users' and 'Teams'. A teal 'Create user' button is in the top right. Below it, a light blue box states 'A few people haven't set up their accounts yet.' with a 'Review users' button. A search bar for 'Search name or email address' is present. Below the search bar is a table with columns 'NAME', 'SEAT', and 'ACCESS'. The table contains three rows: one with an email address and 'Contacts' access, and two with 'Super Admin' access. On the right, two invitation options are shown: 'Quick Invite' (labeled 'About 1 min') and 'Custom Invite' (labeled 'About 5 mins'). A red arrow points from the 'Quick Invite' option to the 'Users & Teams' sidebar menu item.

Settings

- Your Preferences
- Account Setup
- Users & Teams**
- Integrations
- Marketplace Downloads
- Tracking Code
- Privacy & Consent
- Security

Users | **Teams**

Create user

A few people haven't set up their accounts yet. [Review users](#)

Create new users, customize user permissions, and remove users from your account. [Learn more about user permissions](#)

Invite Status | **Last Active** | **Advanced filters** | **NEW**

Search name or email address

NAME	SEAT	ACCESS
xxxxxx@xxxxxx.com	--	Contacts
	--	Super Admin
	--	Super Admin

Quick Invite
About 1 min
Invite your users quickly with a link or email using pre-set permissions.

Custom Invite
About 5 mins
Invite your users with custom access permissions.

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Step 5 – Send Invite with Super Admin.

Quickly create new users

HubSpot is designed for collaboration — share data, assign contacts, and much more.

Add their email address

Email address


Send invite

☒ Make super admin ⓘ

Or share a link to invite one or

Invite link

Copy link

 Only @www.adaptivemarketingresources.com email addresses can access this link

For security reasons, all teammates joining with a link will get limited access permissions. You can [change user access permissions](#) once they've signed up.

Last Step For Hubspot Setup

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We will setup the user fields and import contacts to the CRM.

The screenshot displays the HubSpot CRM interface. At the top, a navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. A search bar labeled 'Search HubSpot' is on the right. The left sidebar shows the 'Contacts' section with a list of contacts, including 'Eileen Antos'. Below this, the 'About this contact' section lists fields like Email, Contact owner, Last marketing email open date, Last marketing email click date, and Advisor Name. The main content area shows the 'Activities' tab for the selected contact. A yellow box with the text 'Hubspot client Dashboard' is overlaid on the 'Activities' tab. Red arrows point from the 'Activities' tab to the 'Activity' sub-tab, and from the 'Activity' sub-tab to the 'Lifecycle change' activity entry. The 'Lifecycle change' entry states: 'Kim Purnell updated the lifecycle stage for this contact to Lead. View details'. Below this, another entry states: 'This contact was created from import women a 328000.xlsx'. The date for both activities is 'Nov 4, 2023 at 4:27 PM EDT'.

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We will setup the user fields and import contacts to the CRM.

The screenshot displays the HubSpot CRM interface. On the left, the contact profile for Eileen Anton is shown, including her email (antonbuck@aol.com) and contact owner information. The main area displays the 'Activities' tab, showing a list of activities for November 2023. A red arrow points from the 'Contact owner' field in the left sidebar to a yellow highlighted box in the center of the screen. The yellow box contains the text: 'Client | Prospect | Customer Activities and engagements shown in dashboard'. The activities list includes a 'Lifecycle change' event on Nov 4, 2023 at 4:27 PM EDT, where Kim Purnell updated the contact's lifecycle stage to 'Customer'.

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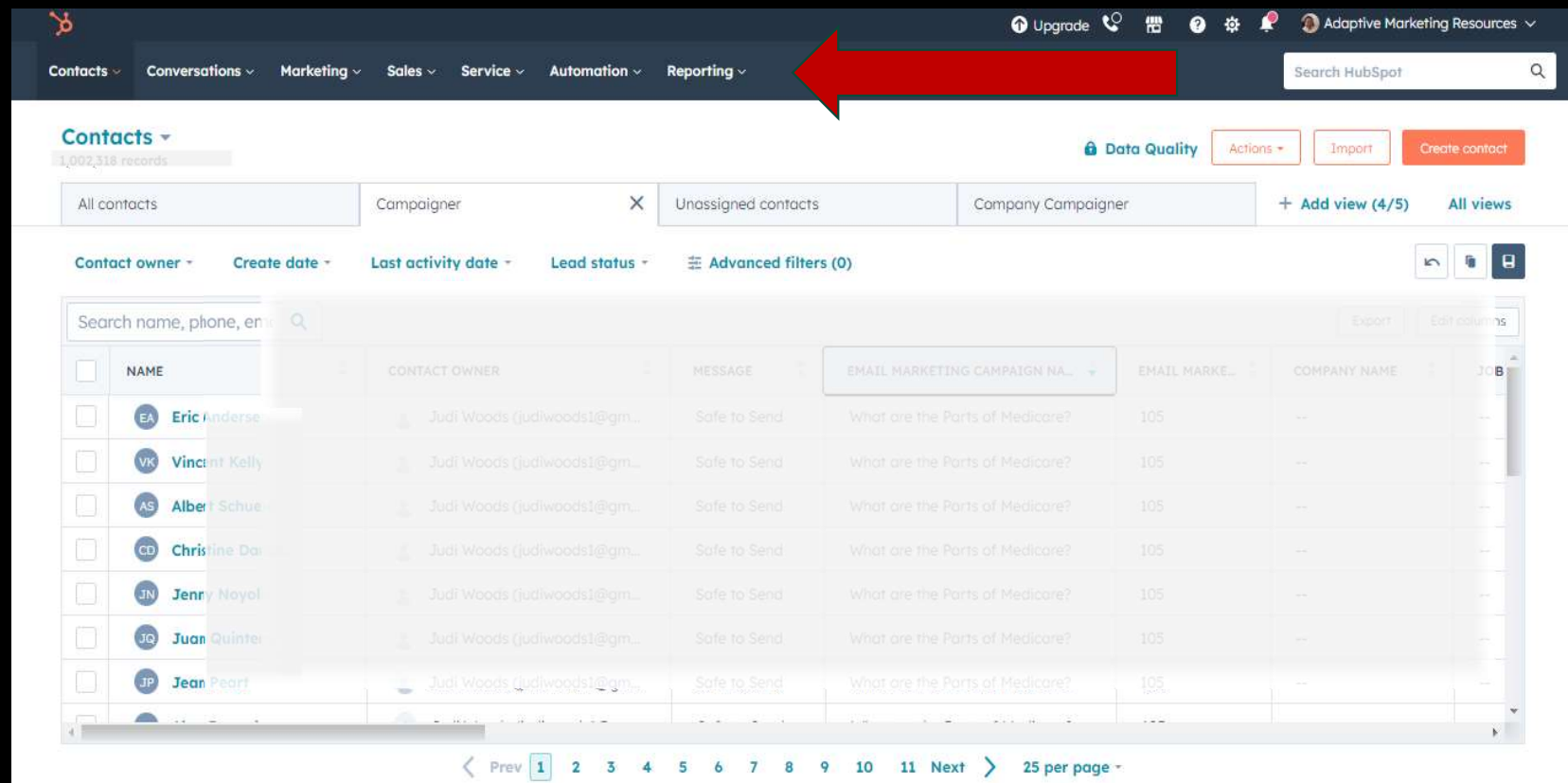
Dashboard Database Multiple Viewing Options

The screenshot displays the HubSpot Contacts dashboard. At the top, there's a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. Below this, the 'Contacts' section is active, showing 1,002,318 records. A filter for 'Assigned contacts' is selected, and a red arrow points to it. The table below lists contacts with columns: NAME, CONTACT OWNER, MESSAGE, EMAIL MARKETING CAMPAIGN NAME, EMAIL MARKETING SCORE, COMPANY NAME, and JOB. A red arrow points to the 'EMAIL MARKETING CAMPAIGN NAME' column. The table shows several contacts, including Eric Andersen, Vincent Kelly, Albert Schuele, Christine Daneka, Jenny Noyola, Juan Quintero, and Jean Pearl. The bottom of the dashboard shows pagination controls for 25 per page.

NAME	CONTACT OWNER	MESSAGE	EMAIL MARKETING CAMPAIGN NAME	EMAIL MARKETING SCORE	COMPANY NAME	JOB
EA Eric Andersen	Judi Woods (judiwoods1@gn...)	Safe to Send	What are the Parts of Medicare?	105	--	--
VK Vincent Kelly	Judi Woods (judiwoods1@gn...)	Safe to Send	What are the Parts of Medicare?	105	--	--
AS Albert Schuele	Judi Woods (judiwoods1@gn...)	Safe to Send	What are the Parts of Medicare?	105	--	--
CD Christine Daneka	Judi Woods (judiwoods1@gn...)	Safe to Send	What are the Parts of Medicare?	105	--	--
JN Jenny Noyola	Judi Woods (judiwoods1@gn...)	Safe to Send	What are the Parts of Medicare?	105	--	--
JQ Juan Quintero	Judi Woods (judiwoods1@gn...)	Safe to Send	What are the Parts of Medicare?	105	--	--
JP Jean Pearl	Judi Woods (judiwoods1@gn...)	Safe to Send	What are the Parts of Medicare?	105	--	--

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Dashboard Database Multiple Viewing Options



The screenshot displays the HubSpot Contacts dashboard. At the top, a navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. A red arrow points to the 'Reporting' link. Below the navigation bar, the 'Contacts' section is active, showing 1,002,318 records. The dashboard includes filters for 'All contacts', 'Campaigner', 'Unassigned contacts', and 'Company Campaigner'. A search bar is present, and there are buttons for 'Data Quality', 'Actions', 'Import', and 'Create contact'. The main area shows a list of contacts with columns for Name, Contact Owner, Message, Email Marketing Campaign Name, Email Marketing Score, Company Name, and Job Title. The first few contacts listed are Eric Andersen, Vincent Kelly, Albert Schue, Christine Davis, Jenny Noyol, Juan Quintel, and Jean Pearl. The bottom of the dashboard shows pagination controls, including 'Prev', 'Next', and a '25 per page' dropdown.

NAME	CONTACT OWNER	MESSAGE	EMAIL MARKETING CAMPAIGN NA...	EMAIL MARKE...	COMPANY NAME	JOB
EA Eric Andersen	Judi Woods (judiwoods1@gm...	Safe to Send	What are the Parts of Medicare?	105	--	--
VK Vincent Kelly	Judi Woods (judiwoods1@gm...	Safe to Send	What are the Parts of Medicare?	105	--	--
AS Albert Schue	Judi Woods (judiwoods1@gm...	Safe to Send	What are the Parts of Medicare?	105	--	--
CD Christine Davis	Judi Woods (judiwoods1@gm...	Safe to Send	What are the Parts of Medicare?	105	--	--
JN Jenny Noyol	Judi Woods (judiwoods1@gm...	Safe to Send	What are the Parts of Medicare?	105	--	--
JQ Juan Quintel	Judi Woods (judiwoods1@gm...	Safe to Send	What are the Parts of Medicare?	105	--	--
JP Jean Pearl	Judi Woods (judiwoods1@gm...	Safe to Send	What are the Parts of Medicare?	105	--	--

The screenshot shows the HubSpot dashboard with the left-hand navigation menu open. The 'Activity Feed' option is highlighted with a large red arrow pointing to it from the left. Other visible options in the menu include 'Contacts', 'Companies', 'Calls', and 'Lists'. The main content area displays a table of activity feed entries, with columns for contact name, message status, email marketing campaign name, email marketing score, company name, and job title. A pagination bar at the bottom indicates 'Page 1 of 11' and '25 per page'.

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Hubspot will track all client & prospecting activity.

The screenshot displays the HubSpot Activity Feed interface. At the top, a navigation bar includes tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. A search bar labeled 'Search HubSpot' is positioned on the right. Below the navigation bar, the 'Activity Feed' section is visible, featuring a search bar and a dropdown menu for 'Activity type: All activity types'. A list of activities is shown, categorized by date (Today, Yesterday). Annotations with red arrows point to specific activity types: 'Opened emails' points to 'Email opens', 'Clicked link in email' points to 'Email clicks', and 'Site visitations' points to 'Lead visits'. The right side of the interface shows a table with columns for 'COMPANY NAME' and 'JOB', along with buttons for 'Export' and 'Edit columns'.

Activity Feed

Search activities

Activity type: All activity types

Today

- Someone opened email RE: Your Video Email Campaigns have been suspended - let's discuss. Yesterday 4:30 PM. 4 opens. Open
- Someone opened email Hello Angle - Kim Purnell. Open

Yesterday

- THOMAS THOMAS opened email Assistance please. Yesterday 4:30 PM. 1 open. Open
- Jose D. opened email Assistance please. Yesterday 4:30 PM. 2 opens. Open

Annotations:

- Opened emails (points to Email opens)
- Clicked link in email (points to Email clicks)
- Site visitations (points to Lead visits)

Table:

COMPANY NAME	JOB
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...

Buttons: Export, Edit columns

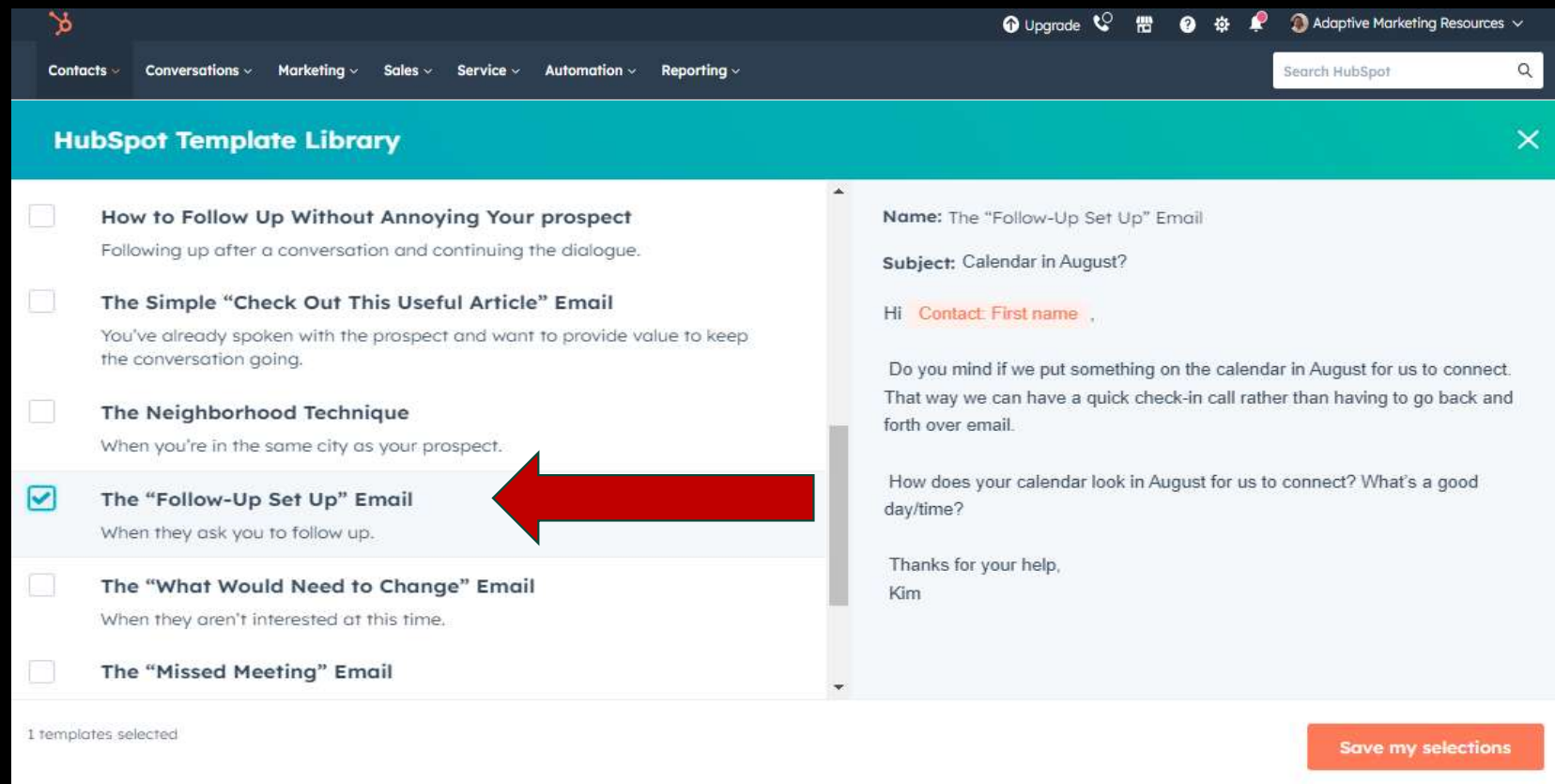
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Dashboard Database Multiple Viewing Options

The screenshot displays the HubSpot CRM interface. The top navigation bar includes tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. A search bar is located on the right. The left sidebar shows a list of options: Inbox, Chatflows, Snippets, and Templates. A red arrow points to the 'Templates' option. The main content area shows a list of contacts under the 'Campaigner' view. The table has columns for 'Last activity date', 'Lead status', 'Advanced filters (0)', 'EMAIL MARKETING CAMPAIGN NA...', 'EMAIL MARKE...', 'COMPANY NAME', and 'JOB'. The table contains several rows of contact data, including names like Eric Andersen, Vincent Kelly, Albert Schue, Christine Dar, Jenny Noyol, Juan Quintel, and Jean Pearl. The bottom of the interface shows a pagination bar with 'Prev', '1', '2', '3', '4', '5', '6', '7', '8', '9', '10', '11', 'Next', and '25 per page'.

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Email templates and custom designs for your use.



The screenshot displays the HubSpot Template Library interface. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting, along with a search bar and user profile. The main section is titled "HubSpot Template Library" and features a list of email templates on the left and a preview of the selected template on the right.

HubSpot Template Library









- ☐ **How to Follow Up Without Annoying Your prospect**
Following up after a conversation and continuing the dialogue.
- ☐ **The Simple "Check Out This Useful Article" Email**
You've already spoken with the prospect and want to provide value to keep the conversation going.
- ☐ **The Neighborhood Technique**
When you're in the same city as your prospect.
- ☒ **The "Follow-Up Set Up" Email**
When they ask you to follow up.
- ☐ **The "What Would Need to Change" Email**
When they aren't interested at this time.
- ☐ **The "Missed Meeting" Email**

1 templates selected

Name: The "Follow-Up Set Up" Email
Subject: Calendar in August?
Hi **Contact: First name**,
Do you mind if we put something on the calendar in August for us to connect. That way we can have a quick check-in call rather than having to go back and forth over email.
How does your calendar look in August for us to connect? What's a good day/time?
Thanks for your help,
Kim

Save my selections

The screenshot shows the HubSpot interface. At the top, there's a navigation bar with various tabs: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. Below this, the 'Contacts' section is active, showing a list of contacts. A sidebar menu on the left lists various marketing tools: Ads, Email, Landing Pages, Website, Social, SEO, Campaigns, Design Tools, and Forms. A large red arrow points to the 'Email' menu item. The main content area displays a table of contacts with columns for Name, Message, Email Marketing Campaign Name, Email Address, Company Name, and Job. The table is filtered by 'Lead status' and 'Advanced filters (0)'. The bottom of the screen shows a pagination bar with 'Prev', '1', '2', '3', '4', '5', '6', '7', '8', '9', '10', '11', 'Next', and '25 per page'.

<input type="checkbox"/>	NAME	EMAIL	MESSAGE	EMAIL MARKETING CAMPAIGN NAME	EMAIL MARKETING CAMPAIGN ID	COMPANY NAME	JOB TITLE
<input type="checkbox"/>	 Eric Andersen	Judiwoods1@gmail.com	Safe to Send	What are the Parts of Medicare?	105	--	--
<input type="checkbox"/>	 Vincent Kelly	Judiwoods1@gmail.com	Safe to Send	What are the Parts of Medicare?	105	--	--
<input type="checkbox"/>	 Albert Schue	Judiwoods1@gmail.com	Safe to Send	What are the Parts of Medicare?	105	--	--
<input type="checkbox"/>	 Christine Davis	Judiwoods1@gmail.com	Safe to Send	What are the Parts of Medicare?	105	--	--
<input type="checkbox"/>	 Jenry Naylor	Judiwoods1@gmail.com	Safe to Send	What are the Parts of Medicare?	105	--	--
<input type="checkbox"/>	 Juan Quintana	Judi Woods (Judiwoods1@gmail.com)	Safe to Send	What are the Parts of Medicare?	105	--	--
<input type="checkbox"/>	 Jean Pearl	Judi Woods (Judiwoods1@gmail.com)	Safe to Send	What are the Parts of Medicare?	105	--	--
<input type="checkbox"/>		Judi Woods (Judiwoods1@gmail.com)	Safe to Send	What are the Parts of Medicare?	105	--	--

Adaptive Marketing Group | Email Marketing Campaigner Integration

Email provider integration – Outlook, Gmail, Etc.

The screenshot displays the HubSpot interface for an Adaptive Marketing Group, LLC. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reporting, and Partner. A search bar is located on the right. The left sidebar menu is open, showing various marketing tools. The 'Email' option is highlighted, and a red arrow points from it to the 'Email' tab in the main content area. Another red arrow points from the 'Email' tab to the 'Connect personal email' button. The main content area shows the 'Email' settings page, which includes a 'General' tab and a table of connected email accounts.

General



Profile | **Email** | Calling | Calendar | Tasks | Security

These preferences only apply to you. For account level email management, go to [email logging settings](#).

Email

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](#).

[Connect personal email](#)

EMAIL	STATUS	INBOX AUTOMATION ⓘ
 marketing@adaptivemarketingresources.com Inbox type: G Suite	● Enabled	<input checked="" type="checkbox"/>
 kpurnell175@gmail.com Inbox type: Gmail	● Enabled	<input type="checkbox"/>

The screenshot shows the HubSpot CRM interface. At the top, there's a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. A search bar for 'Search HubSpot' is on the right. Below the navigation bar, the 'Contacts' view is active, showing '1,002,318 records'. A left sidebar contains a list of navigation items: Prospecting (with a 'NEW' button), Deals, Forecast, Tasks, Documents, Meetings, Payments, Playbooks, Products, and Quotes. A large red arrow points to the 'Unassigned contacts' filter in the top right of the main view. The main view displays a table of contacts with columns: NAME, MESSAGE, EMAIL MARKETING CAMPAIGN NAME, EMAIL MARKE..., COMPANY NAME, and JOB. The table shows several rows of contact data, including names like Eric Andersen, Vincent Kelly, Albert Schue, Christine Dai, Jenny Noyol, Juan Quintel, and Jean Pearl. At the bottom, there's a pagination bar showing 'Prev 1 2 3 4 5 6 7 8 9 10 11 Next' and '25 per page'.

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Exceptional Mobile Platform Delivery and Connectivity



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Hubspot is only as good as your willingness to learn and use the platform.

It is also what Adaptive Marketing Group uses and where the analytics for any Campaigner Emails will be delivered.