

Tips for Using HubSpot

51 tips for getting the most from the world's leading inbound marketing platform.



HubSpot CRM

A free marketing resource from

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Get the Most from HubSpot

Because HubSpot's all-in-one platform comes with such an extensive amount of functionality, there are always opportunities to learn something new. I'm sure, at one point, you used HubSpot and thought to yourself, "Aha! I had no idea the tool did this!"

In Marketing Hub, Sales Hub, and Service Hub, there are more than 1,000 different ways to use the HubSpot platform – not to mention the continuous product updates released each week.

In this guide, we provide 51 tips for using HubSpot and taking advantage of its many hidden features.

We hope you find this information helpful. If you have any questions, feel free to reach me at 800-834-4910 or at inbound281.com.

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51 Tips for Using the HubSpot Software [Support Series]

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We've all been there.

We think we know how to use software perfectly, until one day we notice a new button we've never seen or we try to use a new tool to accomplish a business goal.

And HubSpot is no exception. In Marketing Hub, Sales Hub, and Service Hub, there are more than 1,000 different ways to use the HubSpot platform – not to mention the continuous product updates released each week.

Because HubSpot's all-in-one platform comes with such an extensive amount of functionality, there are always opportunities to learn something new. I'm sure, at one point, you used HubSpot and thought to yourself, "Aha! I had no idea the tool did this!"

Well, I'll let you in on a little secret: This happens every day to HubSpot users, including our customer support reps.

But there's no reason why we should keep these light bulb moments to ourselves, which is why we've compiled some aha moments recently discovered by HubSpot users and support reps. These are taken directly from our customer support reps running tests and working with other users like you.

With these 51 tips, you'll be one step closer to calling yourself a product expert.

CONTACTS

Tip 1: If you delete a contact associated with a company, the email content and tracking will stay on the company record (unless the contact is deleted in [compliance with GDPR](#) – this will remove tracked and logged emails from the company page as well).

Tip 2: If you [move the order](#) of properties in a contact or company record, these changes are only user specific. This means that the changes are only visible to the person who made the changes.

Tip 3: Call recordings are stored forever on a contact's timeline until a portal is purged or a GDPR-contact delete request comes in for the contact.

Tip 4: You can send any contact through the lead scoring tool as a [test contact](#) to see which criteria they meet and do not meet.

Tip 5: The Company Name contact property is [different](#) than a contact's associated company. Therefore, filtering contacts by "company name is known/unknown" will not pull in associated company names unless you are manually entering that information.

CONTACT TOOLS

Tip 6: If your form fields are pre-populating with another person's information who has never submitted a form on your browser, it is likely due to a forwarded email because cookies are [carried over with it](#). Clearing your cookies will help to resolve this.

Tip 7: The number of form submissions on the form dashboard page is related to the date range at the top (which is why the number is sometimes so much less than when you actually click into the form).

Tip 8: You cannot clone [static lists](#).

Tip 9: A workflow can enroll [20 contacts per second](#).

Tip 10: For accounts that contain more than 10,000 contacts, the workflows estimate feature samples 1/16th of your contacts to determine [how many contacts meet the enrollment triggers](#).

Tip 11: When setting a workflow to execute actions on business days only, delays still count on weekend days. So only actions, not delays, will follow the rule. See our article [here](#) for more information on the business days setting.

Tip 12: If you use a workflow to clear lifecycle stage, the respective "became an ___ date" property will be [cleared as well](#).

Tip 13: If you delete a contact who is currently in a delay in a workflow, the workflow will still count the contact as active and in the delay until the time of the delay has ended.

CONTENT

Tip 14: You can [move website pages to landing pages](#) and vice versa.

Tip 15: [Scheduled blog posts](#) will be based on the time zone set in Account settings.

Tip 16: You can [change the publish date](#) of a blog after it was published by going back to the Publish and Schedule tab.

Tip 17: It is only possible to associate HubSpot content to [campaigns](#).

Tip 18: Throughout HubSpot, you can click the Help button in the bottom right to display knowledge articles related to the area of HubSpot that you are in.

Tip 19: An RSS feed can only show up to [50 recent posts](#).

Tip 20: [Setting a default blog](#) is user specific. Each user has to star the blog they want to be default.

Tip 21: If you are looking to breathe new life into your content with something fun, you can create a "Buzzfeed-style" quiz using dashboard.tryinteract.com/quizzes and embed it into a landing page or blog post.

Tip 22: You in fact can use a different template on an A version of an email as compared to the B version when running an A/B test.

CONTENT SETTINGS

Tip 23: When you [connect an email sending domain](#), the "via HubSpot" text is removed, so the email looks like it is coming from the connected email's domain. But the email is technically still being sent from HubSpot's servers.

Tip 24: You cannot host content from two different content providers on the same subdomain (Example: you cannot host website content for www.test.com on both HubSpot and WordPress).

Tip 25: If you change the primary domain for content in your domain manager, the domain that's no longer used for these tools will automatically redirect to the new domain. You may see some downtime for a few minutes when going to the old domain while we set up that redirect.

Tip 26: If double-opt in is set up for all pages, this will also apply to external website pages where the HubSpot tracking code is embedded.

DESIGN

Tip 27: Below are some tricks to add to the end of a YouTube URL to edit how a video plays when someone visits the page:

- Autoplay: ?autoplay=1
- Mute: mute=1
- Play with captions: cc_load_policy=1 (Example URL: src="//www.youtube.com/embed/VideoID?autoplay=1&mute=1&cc_load_policy=1")

For a full list of parameters that can be used with YouTube videos, check out Google's page [here](#).

Tip 28: You can opt back into the custom HTML module in the new design manager via the Marketplace. However, these HTML modules do not accept HubL.

Tip 29: Outlook does not respect "float" CSS rules, so images within rich text modules may jump around in Outlook. Use `<align="left/right">` to ensure they stay put in Outlook. Want a full rundown of how CSS renders across the most common email clients? Check our Campaign Monitor's Ultimate Guide to CSS [here](#).

Tip 30: Code for margin and padding is added clockwise. I.e. `margin: 10px 20px 30px 40px` means to add margin 10px top, 20px right, 30px bottom, 40px left.

Tip 31: To center images using CSS: Images are inline elements, so need to first use `"display: block;"` then can add `"margin: 0 auto;"` to center.

Tip 32: Did you know that on average, sync behavior is around 3-4 API calls per record? So if someone is looking to sync 1,000 contact records to Salesforce, you can set expectations to expect around 3,000-4,000 API calls to be used.

Tip 33: If you ever see an error message that says "ERR_BLOCKED_BY_CLIENT," that means that your browser is stopping something from rendering; it's usually an adblocker.

EMAIL

Tip 34: When you CC an email address when sending an email through the CRM, it will create a new contact record.

Tip 35: [What's the difference between a hard bounce and a soft bounce?](#) A hard bounce means the email was rejected by recipient's server and marked as undeliverable, while a soft bounce means that the email will keep trying to ping the recipient's server for 72 hours. If a soft bounce does not resolve after that time, it will turn into a hard bounce.

Tip 36: You can insert as a link in an email that allows contacts to opt out of all email communications vs which links to the email preferences pages where contacts can opt out of specific types of email. Check out our article [here](#) for more information.

Tip 37: If you [mute a sales email](#), it mutes all recipients in the threaded email by default.

Tip 38: You cannot send the same marketing email to a contact twice—you'll first need to clone the email.

REPORTING

Tip 39: With the reporting add-on, you can create reports from custom saved filters to further segment your dashboard reports. This can be done from either the custom report builder or the main contact dashboard.

Tip 40: The Marketing Performance dashboard only shows customers in the month of first conversion, [not the month that they became a customer](#).

Tip 41: If you notice a sharp spike in Google Analytics of traffic to their website from HubSpot that mimics the behavior of a bot (thousands of visits that bounce immediately), it's probably not actually HubSpot, but rather Amazon Web Services (AWS) web crawlers.

Tip 42: If you unpublish and re-publish a landing page, all previous page metrics should still appear on the performance page.

Tip 43: Regarding tracking URLs, it does not matter whether a contact clicks on the tracking URL or just visits a page that redirects to the tracking URL. As long as the page fully loads, then the contact/session will be bucketed under the tracking URL. This is because the tracking parameters will be contained within the destination page URL.

Tip 44: In the list tool, you can now filter contacts by sales emails (Ex: "Email subject contains") AND you can filter by meetings, notes, call duration, call notes, and tasks.

Tip 45: To see how many people clicked a link in any email, use the contact property emails clicked is greater than 0 in the list tool or main contact dashboard.

SALES TOOLS

Tip 46: HubSpot can predict the [likelihood of a contact closing](#) in Sales Hub, and it's pretty cool if you ask me.

Tip 47: An entire message conversation will be added to the contact's timeline record (see number 5 of this article [here](#)).

Tip 48: You can send [automatic email reminders](#) for meetings. These can be set and customized when editing a meeting and selecting "send reminder emails to prospects who book meetings through this link."

Tip 49: When a messages widget is set to collect emails, it will only show the prompt when the agent is inactive for 60 seconds, not directly after the first message is sent.

SOCIAL MEDIA

Tip 50: In the [campaigns tool](#), you can only associate social messages from the last 30 days to a campaign. However, you can bulk associate social messages from a custom time period to a campaign in the [social publishing tool](#).

Tip 51: For truly stellar social media posts, keep the ultimate guide to best social media image sizes in your back pocket: <https://blog.hubspot.com/marketing/ultimate-guide-social-media-image-dimensions-infographic>.

After reading all of these product facts, I hope you also had some aha! moments of your own. These tips and tricks are not always obvious or able to be found in a Knowledge Base article, but they are definitely valuable facts we think all users should know. Now, go forth and use HubSpot more effectively than ever.

About Inbound 281



A Growth Agency

Inbound 281 is a full-service, growth-focused digital marketing agency. We help businesses grow by improving their marketing to increase sales, revenue and profits.

We help owners, marketers and sales managers who are looking for new ideas to help sales hit their targets. Often times they are frustrated that, after all the time, efforts and money they have invested, they're still not getting the results they were expecting.

Our sights are set on lead acquisition, lead conversion, and conversion rate optimization.

We specialize in multi-channel digital marketing, including content marketing, web design and development, SEO, pay per click, and social media.

Ready for a Conversation?

What's your dream result? Let's get the digital marketing conversation started!

Looking for new customer acquisition, lead generation, client engagement or a competitive advantage? We're ready to learn more about your goals so we can help you build a Marketing Road Map to help you achieve your goals.

[Schedule a Conversation](#)

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