YOUR COMPLETE GUIDE TO HUBSPOT TOOLS

Get to know all the HubSpot tools and what they can do for your business.

A COMPREHENSIVE GLOSSARY

THE ABCs OF HUBSPOT TOOLS

HubSpot is loaded with tools that will help you boost business operations, decrease time spent on manual tasks, align your marketing and sales team, and more.

In this glossary of tools, we'll explain what they are and how to use them to increase efficiency and delight both your teams and customers.

Let's learn our HubSpot ABCs.

A

Account Defaults:
This is where you apply the defaults for your entire account. Items include time zone, company name, domain, address, and fiscal year.

Activities:
This is where you log and track everyone's data within the account's CRM.

Ads:
Connect your ad accounts to manage all your ad campaigns. This tool will allow you to:

- Tie ad spend directly to company revenue
- See who is interacting with each ad
- Re-engage with existing contacts
- Align advertising with the rest of your marketing

Allow & Deny List:
Housed under Inbox in your settings, this tool allows you to manage which incoming conversations should be marked as spam in your inbox.

App Marketplace:
An extensive marketplace of apps that integrate with HubSpot.

Availability Management: Housed under Inbox in your settings, this tool allows you to manage user availability for any inbox a user is associated with.

B

Blogs:
Available with all HubSpot subscriptions, this tool allows you to create posts about your business, industry trends, company news, and more. *Note: The number of blogs you can create depends on your HubSpot subscription.*

To create a blog:

- In the left sidebar menu, navigate to Website Content > Blog.
- Choose to Generate a Blog Post or create one yourself.

Brightlane:
A Lynton-designed CMS theme has nine templates and 33 drag-and-drop modules. Use it to promote events. See it.

Brightlane+:
This Lynton-designed theme allows you to effortlessly build custom webpages that mirror your brand and captivate your audience with its 16 templates, 44 saved sections, and 43 modules. See it.

Bussin':
A Lynton-designed theme for the food and beverage industry that comes with nine templates and 29 drag-and-drop modules. See it.

C

Calling:
Connect an outbound phone number to log, track, and make calls in HubSpot.

Call-to-Action (CTA):
A button or designed element that entices site visitors to complete a desired action. Use it to promote sales, products, demos, sign-ups, and more. Find them under Marketing > CTAs. Analyze and create yours here.

Campaigns:
A campaign is an organized, strategic effort to promote a specific goal. This tool helps you create, manage, and report on a single marketing campaign using multiple assets in one place. Create one from scratch or use a HubSpot template. Navigate to Marketing in your left nav panel > Campaigns.

ChatSpot:

A conversational AI tool designed to assist with your business' sales and marketing goals.

CMS Hub:

This content management system allows you to create and provide website visitors with a personalized and secure experience. The hub provides:

- Drag-and-drop page editing
- Modern themes
- AI content assistant (in public beta)
- SEO recommendations
- Personalization
- Memberships
- E-commerce
- Premium hosting and
- Security

Coaching Playlists:

Playlists that contain complete or clipped call recordings to help train your team members. Playlists can help you teach soft skills and selling tactics, or train existing team members on how to position a new product.

- In your HubSpot account, navigate to Sales > Coaching Playlists.
- Click Create playlist on the top right.

Connected Apps:

Pre-built apps available in the App Marketplace that you can connect to your HubSpot Portal that allow you to streamline workflows and data input. The Salesforce App is a very common app built by HubSpot that is connected to many HubSpot portals.

Contacts:

A contact is anyone who interacts with your business online or in person.

Cookies:
Digital cookies, or internet cookies, are text files containing small pieces of data like usernames and passwords. These cookies play a crucial role in identifying a user's computer during internet browsing sessions. Websites use cookies to enhance user experience, remember login details, track user behavior, and personalize content based on preferences. Cookies are created by web servers and stored on a user's computer or device to facilitate various functions while navigating websites. HubSpot has a cookie banner tool with easy-to-create cookie consent banners so that visitors to your website know your site uses cookies and choose whether to accept or reject cookies.

Customer Relationship Management (CRM):
A software system designed for managing interactions with current and potential customers.

Custom Objects:
Object categories you can create if your needs don't fall under contacts, companies, or deals. Custom objects work just like standard objects, which means you can leverage better data.

D

Dashboards:
View marketing, sales, and service data in your dashboard. These can be customized for your entire business and can act as a single source of truth.

Deals:
Use deals in HubSpot to track potential revenue through your sales process. Associate deals with other records, such as contacts and companies, to stay organized.
To manually create a deal:

- In your HubSpot account, navigate to Sales > Deals
- In the upper right, click Create deal
- In the right panel, enter the details of the deal

Domain:
The URL(s) you connect to your HubSpot account.

E

Email Service Provider (ESP):
A software company that facilitates the process of building email lists and sending emails to subscribers. ESPs offer tools for email marketing campaigns, allowing marketers to efficiently manage and send emails to a list of users. HubSpot allows you to connect email providers like Mailchimp and Constant Contact to your HubSpot account to sync your existing email service provider contacts.

Email Templates:
Create your own templates or import from an existing ESP. You can manage or edit your saved marketing email templates, allowing you to directly make changes or reuse them in the drag-and-drop editor without redesigning a template from scratch.

If you have an email template you want to use from another CRM, import it into HubSpot following these steps:

- Marketing > Files and Templates > Design Tools
- Click File on the right, under New
- When the dialog box pops up, choose HTML & HUBL
- Choose Email as your template type and paste the HTML of your existing template. You can also choose where you want to save the template.

To create a new template:

- Create new template in the email tool
- In the dialog box, enter a name for your template, then click Create Template
- After you're done designing your new template, create Update Template in the top right
- In the dialog box, click Use This Template to continue configuring your email and get it ready to publish and send, or you can return to the template listing page by clicking View All Templates.

Export Audit:

Provides a detailed description of who exported data from your CRM, when, what data was exported, and more.

Export:

The process of taking data from your CRM.

F

Framework:

A Lynton-designed CMS template with 10 page templates and 34 drag-and-drop modules offers a complete design solution, making it simple for SaaS and tech companies to create content. See it.

Framework+:

A Lynton-designed CMS template with 16 page templates, 48 drag-and-drop modules, and 14 saved sections. They are so easy to use that anyone in your business can build stunning, branded pages. See it.

Forms:

A way to capture leads on your website. To create one, follow these steps:

- Navigate to Marketing > Lead Capture > Forms.
- In the upper right, click Create form.
- Select your form type, then in the upper right, click Next.
- In the left panel, select Blank template to start with a blank form or a pre-made template to start with a form for a specific use case. The form preview will appear in the right panel. If you want to use a Support template, you'll need Account
- Access permissions.
- In the upper right, click Start.
- At the top of the form editor, click the pencil icon to edit the form name.
- From here, edit and add form fields.

G

General Data Protection Regulation (GDPR):
An EU Regulation that significantly enhances the protection of the personal data of EU citizens and increases the obligations of organizations that collect or process personal data. If you market your products or services to people in the EU or monitor the behavior of people in the EU, GDPR will apply to you.

H

HubDB:
Similar to a spreadsheet, HubDB allows you to create tables to store data in rows, columns, and cells.

HubSpot Academy:
HubSpot's training portal full of information on how to use HubSpot, but also how to be a successful marketer, developer, and more.

I

Impact:
A Lynton-designed theme designed with nonprofits and educational institutions in mind. It features 10 page templates and 31 drag-and-drop modules. See it.

Import:
The process of adding data to your CRM.

Inbox:

A central location in your HubSpot account where messages from all of your connected channels will appear.

Integrations:

External apps you can add to your HubSpot CRM. They can be found in the app marketplace or created custom.

Invoices:

Enable your team to send invoices directly from HubSpot, track your receivables, and get paid using HubSpot payments.

J

K

Knowledge Base:

An online library of articles, guides, references, and troubleshooting documents you can build for your customers.

L

Landing Pages:

Use them to attract visitors and convert them into business leads. They are typically used to collect a visitor's contact information in exchange for a resource, like an ebook, guide, infographic, webinar, etc.

Lead:
A contact or company that has converted on your website or through some other interaction with your organization beyond a subscription sign-up.

Lists:
An organizational tool used to create a list of contacts, companies, deals, or custom objects based on property values and other characteristics, including activities.

M

Marketing Contacts:
A contact that is categorized for marketing purposes within the HubSpot platform. These contacts are part of the paid contact tier and can be targeted for marketing activities. By setting contacts as marketing contacts, users can effectively manage and engage with them for marketing campaigns, such as emails and digital content. Marketing contacts can also be sent automated emails triggered by workflow.

Marketing Hub:
Enables your business to become a marketing powerhouse by automating manual tasks, organizing content, and more. This hub will help you:

- Attract and nurture leads
- Create and manage content
- Manage social media channels and posts
- Improve email marketing
- Work efficiently with marketing automation
- Analyze and measure website traffic, lead generation, email engagement, social media reach, and more

Meetings:
Lets prospects book a meeting time that works for you and them.

N

Non-HubSpot Form:

Submissions from non-HubSpot forms can be collected in HubSpot by installing the HubSpot tracking code on your external page.

O

Operations Hub:

Helps users clean, curate, sync, and maintain data. It will also help you dig into more advanced data from your integrations.

- Create custom-coded workflows
- Curate HubSpot datasets
- Automatically calculate the minimum, maximum, count, sum, or average value for properties on associated records
- Automate data cleanup

P

Payments:

This tool allows you to collect one-time and recurring payments from customers in your CRM using invoices, payment links, and quotes.

Permissions:

Customize which objects or activities a user in your CRM can view, edit, or delete.

Persona:
A fictional representation of your ideal customer based on marketing research and previous interactions with existing customers. Personas will sometimes be given colloquial names like Billing Bob or Sales Sallie, depending on their organizational function.

Playbooks:
Allow users to create interactive content cards displayed in contact, company, deal, and ticket records.

Private Apps:
Custom-built apps that allow access to specific data within a HubSpot account through HubSpot's APIs. These apps provide a secure way to connect external systems with HubSpot accounts. Private apps generate access tokens to enable the retrieval of data from HubSpot. They offer a balance between the ease of setup provided by API keys and enhanced security features, making them suitable for various purposes like one-off scripts or single API calls.

Products:
A library of the goods and services you sell. With products, you can easily track what you're selling to your customers.

Prospecting:
This tool provides a personalized prospecting workspace that gives your reps access to all the relevant data and tools they need to qualify their leads without distractions.

Q

Quotes:
Share quotes with customers interested in buying a product or service from your company. Use the quotes tool to create a webpage that includes pricing information for line items.

R

Rubric:
A Lynton-designed theme with educational institutions in mind. It features 11 optimized templates and 23 modules with advanced customization. See it. templates and 23 modules with advanced customization. See it.

S

Sales Hub:
This hub will help you identify engaged prospects and focus on closing the warmest leads.

- Organize and track contacts in one place
- Prioritize daily sales calls
- Track emails to follow how your leads respond
- Automate personalized sales emails to stay top of mind
- Track and manage leads in your pipeline
- Build email templates for easier, effective communication
- Use reports to monitor deal activity, conversion rates, and revenue generated

Search Engine Optimization (SEO) Marketing Software:
This tool helps craft SEO strategy, optimize your content, and measure ROI.

Service Hub:
This hub helps you manage customer relationships and streamline your ticket process.

- Track, manage, and resolve customer tickets
- Create a knowledge base for your team and your customers
- Add chatbots to enhance the service experience
- Measure customer service performance
- Streamline the customer service process across your team and your business

Social Media:

The social media tool lets you connect all your social accounts and create, schedule, and analyze posts and performance.

SMS:

Create text message campaigns using HubSpot's SMS tool.

Spark:

A Lynton-designed CMS theme that comes with nine page templates and 20 drag-and-drop modules. See it.

Spark Premium:

A Lynton-designed CMS theme that includes 26 page templates and 48 drag-and-drop modules to help your website shine. See it.

T

Tasks:

This tool helps you organize your processes within HubSpot. You can also think of them as a to-do list.

Templates:

Reusable designs for emails, landing pages, website pages, CTAs, etc.

Template Marketplace:

HubSpot's marketplace for CMS themes and modules. All of Lynton's CMS themes are available in the Template Marketplace.

Themes:

A set of templates, modules, global content, and style settings that can be used to brand and create a website.

Tickets:

A request for help from your customers or users.

Tracking Code

HubSpot tracking code lets you track visitors to your website, gather traffic analytics, identify visitors, track events, and monitor page views. It gives you insights into visitor behavior on your site and helps in analyzing the effectiveness of your marketing efforts.

Tracking URL:

Tracking URLs are unique links that help you organize your marketing campaigns. They will help you understand which sources are the most effective in driving traffic to your marketing efforts.

Traverse:

A Lynton-designed theme with commerce in mind. It features eight page templates and 38 drag-and-drop modules for an easy website creation experience. See it.

U

URL Redirect:

The location a URL routes to when a page is unpublished or archived. This prevents 404 and 301 redirect errors.

User & Teams:

Add users and create teams in HubSpot to organize your business. Note: Users on one team may not necessarily have all the access another team has.

V

Vertical:

A Lynton-designed CMS theme designed with small businesses in mind. It features 10 page templates and 36 drag-and-drop modules that are marketer-friendly and help you easily create a branded website. See it.

W

Website Pages:

Your internal website pages, such as contact, products, about, etc.

Workflows:

This tool allows you to automate repetitive marketing, sales, and customer service tasks to scale up your activities.

X

Y

Z

If you have questions as you go, don't forget to tap into HubSpot's extensive [Knowledge Base].

WORK WITH A TRUSTED HUBSPOT ELITE PARTNER

Let's face it: Getting started with a new CMS/CRM is intimidating, but we are here to help. Lynton is stacked with HubSpot experts ready to make your website work harder for you. Reach out to learn more about onboarding, integrations, and more.

CONTACT US →

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