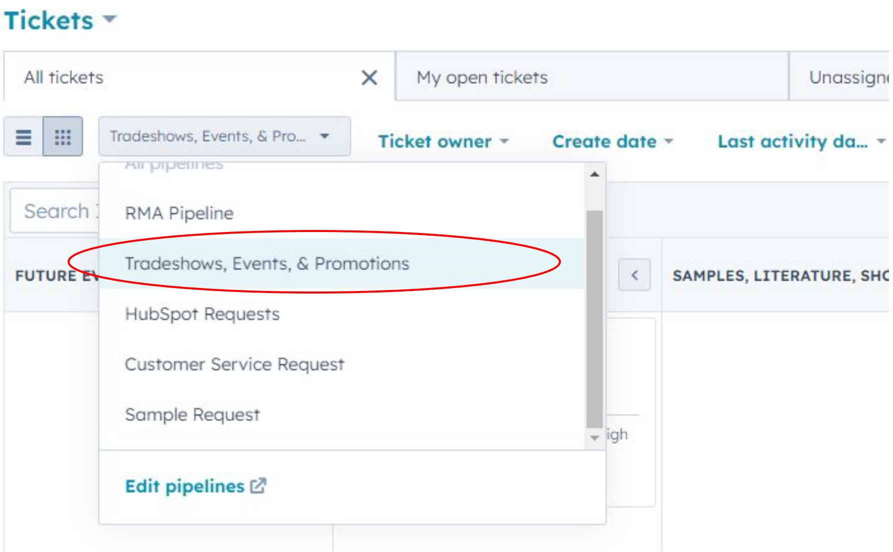
How to Input & Track Trade Show Information in HubSpot

Objective:

Starting September 2024, TownSteel is shifting towards housing more of their internal processes in HubSpot. The following slides will provide step-by-step instructions on how to properly store trade show and event information within HubSpot's ticket pipelines.

1. Navigate to "CRM" on the left column
2. Click on "Tickets"
3. In the ticket pipelines drop down below "All Tickets", select the "Tradeshows, Events, & Promotions" pipeline

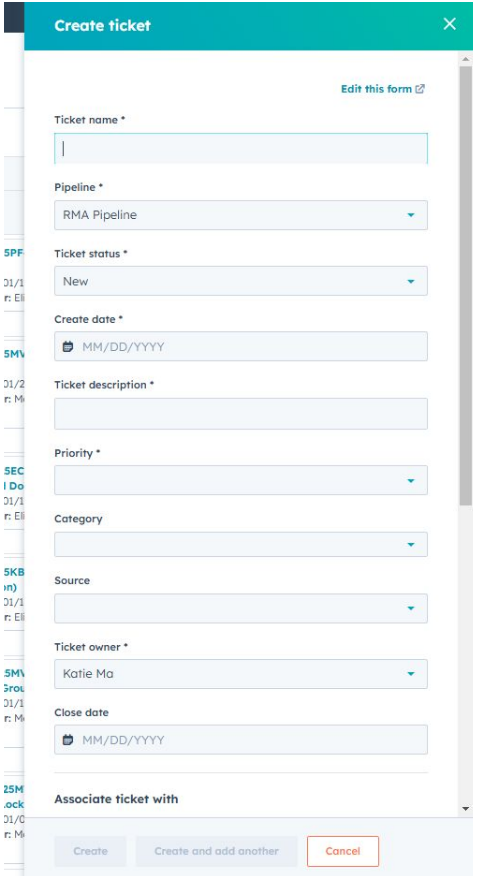


Objective:

1. Click the orange “Create Ticket” button in the top right corner. A form will pop up on the left side of the page.
2. Enter the name of the tradeshow into “Ticket name*”
3. Enter any notes or information on the tradeshow into “Ticket description*”
4. Fill out the rest of the required information, which will be indicated with an *

Required fields include:

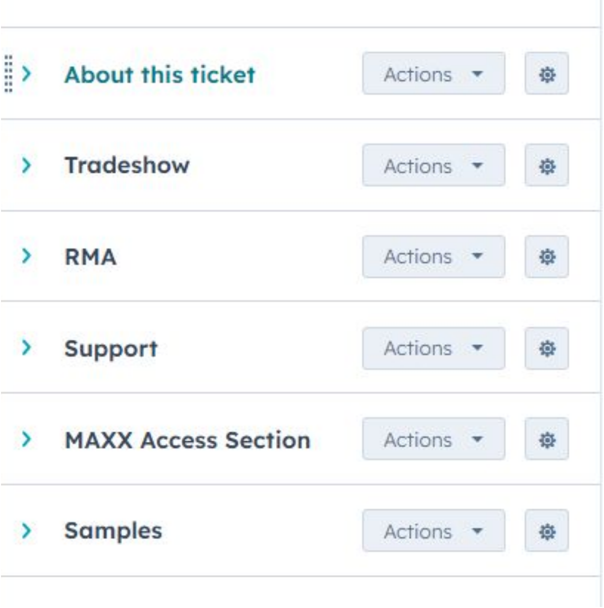
- Ticket name
- Pipeline
- Ticket status
- Create date*
- Ticket description
- Priority
- Ticket owner



Objective:

Once you are done, hit the orange “Create” button on the bottom of the page. It should automatically take you to the ticket’s page

On the left side column under the tradeshow name, there are different ticket information sections including “About this ticket”, “Tradeshow”, “RMA”, “Support”, “MAXX Access Section”, and “Samples”



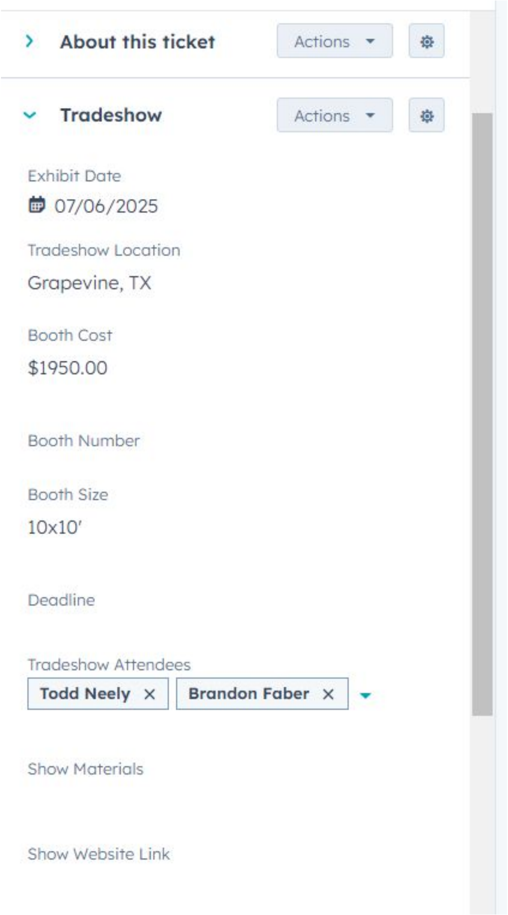
Objective:

Find the section labeled “Tradeshow” and fill out the information to the best of your ability.

The information under that section include:

- “Exhibit Date”
- “Trade Show Location”
- “Booth Cost”
- “Booth Number”
- “Booth Size”
- “Deadline”
- “Trade Show Attendees”
- “Show Materials”
- “Show Website Link”

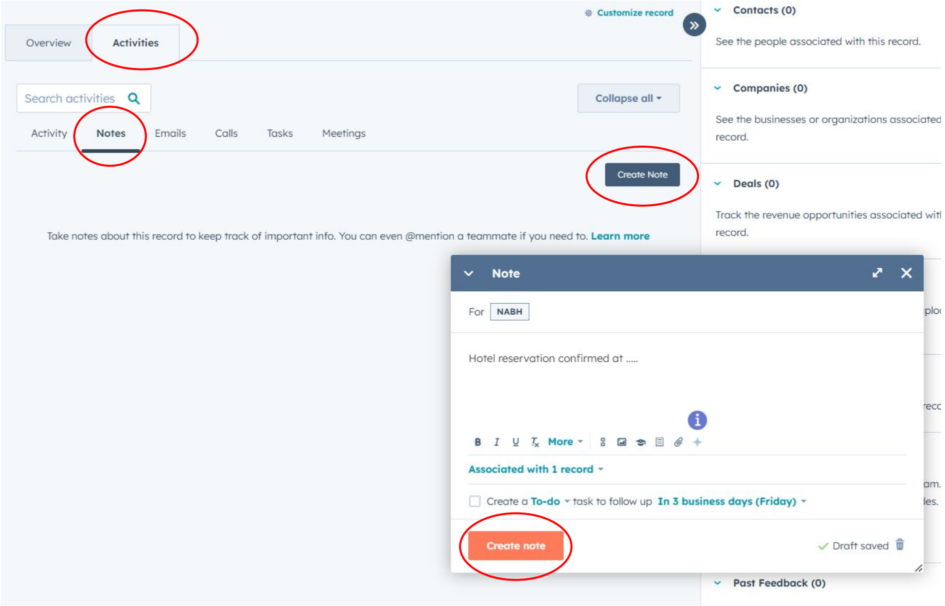
Continue to update as you receive more information over time. *This section is very important as it will be the main place for logging the essential information for the tradeshow.*



Objective:

For any new information or updates to add, click on the “Activities” tab in the middle of the page, then click on the “Notes” tab. Information to add into the “Notes” section can include hotel reservations, updates on the attendees, communication, additional booth information, etc.

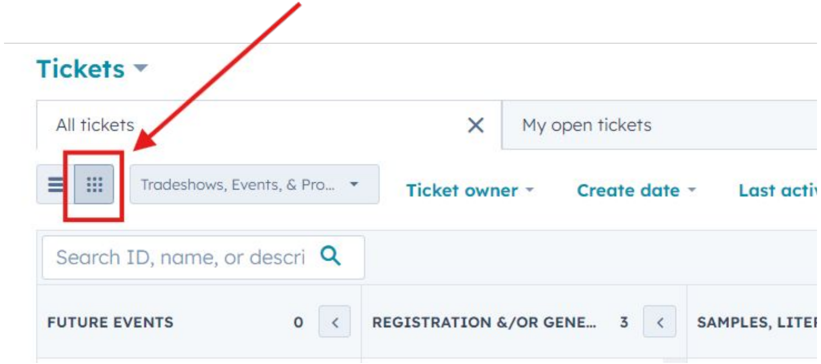
Hit the “Create Note” button to make a note, type in the information, and click the “Create Note” button on the bottom once you are finished. Please continue to add updates regarding the show to this notes section so we can have a streamlined place to document all of our information regarding that trade show.



Objective:

In the main ticket page for the “Tradeshows, Events, & Promotions” pipeline, there are 6 stages:

- “Future Events”
- “Registration &/Or Generation”
- “Samples, Literature, Show Materials”
- “Social Media Promotion”
- “Lead Follow Up”
- “Closed”



Click on the “board” view highlighted in red to view the tickets in a board view.

Click and drag the ticket into its current appropriate stage. If the status of the ticket changes, click and drag the ticket into the new appropriate ticket stage.

Objective:

After the show ends and all other processes related to that show are complete, click and drag the ticket to move it into the “Closed” stage, which allows us to classify the trade show as complete.