

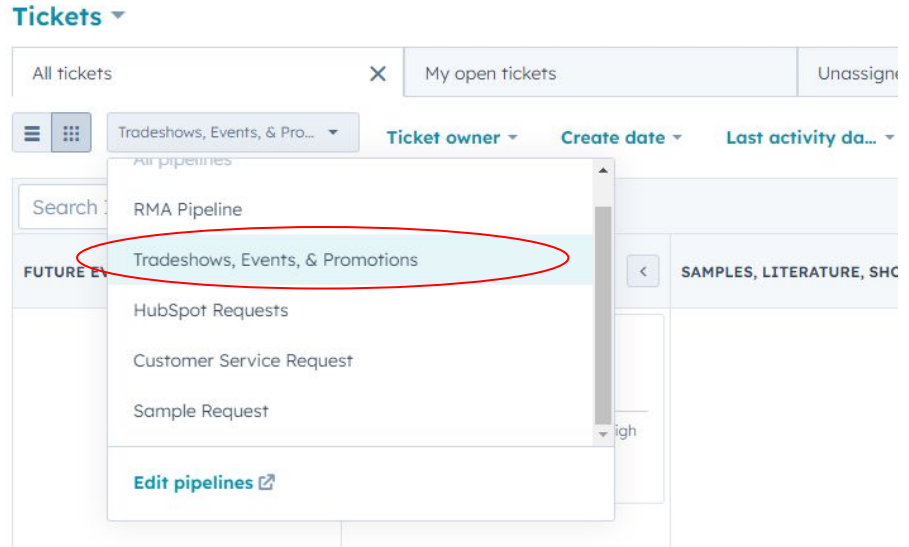


How to Input & Track Trade Show Information in HubSpot

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

The screenshot shows a 'Create ticket' modal form. The form has a teal header with the title 'Create ticket' and a close button (X). Below the header, there is a link 'Edit this form' with an external link icon. The form contains several input fields, each with a label and an asterisk indicating it is required. The fields are: 'Ticket name *' (text input), 'Pipeline *' (dropdown menu showing 'RMA Pipeline'), 'Ticket status *' (dropdown menu showing 'New'), 'Create date *' (calendar icon and text input showing 'MM/DD/YYYY'), 'Ticket description *' (text input), 'Priority *' (dropdown menu), 'Category' (dropdown menu), 'Source' (dropdown menu), 'Ticket owner *' (dropdown menu showing 'Katie Ma'), and 'Close date' (calendar icon and text input showing 'MM/DD/YYYY'). At the bottom of the form, there is a section 'Associate ticket with' followed by three buttons: 'Create', 'Create and add another', and 'Cancel' (which is highlighted with a red border).

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”

⋮	> About this ticket	Actions ▾	⚙
	> Tradeshow	Actions ▾	⚙
	> RMA	Actions ▾	⚙
	> Support	Actions ▾	⚙
	> MAXX Access Section	Actions ▾	⚙
	> Samples	Actions ▾	⚙

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.*

>	About this ticket	Actions ▾	⚙️
▼	Tradeshow	Actions ▾	⚙️
Exhibit Date			
📅 07/06/2025			
Tradeshow Location			
Grapevine, TX			
Booth Cost			
\$1950.00			
Booth Number			
Booth Size			
10x10'			
Deadline			
Tradeshow Attendees			
Todd Neely ✕ Brandon Faber ✕ ▾			
Show Materials			
Show Website Link			

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.

The screenshot displays a CRM interface. At the top, there are tabs for 'Overview' and 'Activities'. The 'Activities' tab is selected and circled in red. Below the tabs, there is a search bar labeled 'Search activities' and a 'Collapse all' button. Underneath, there are sub-tabs for 'Activity', 'Notes', 'Emails', 'Calls', 'Tasks', and 'Meetings'. The 'Notes' tab is selected and circled in red. To the right of the 'Notes' tab, there is a 'Create Note' button, also circled in red. Below the tabs, there is a text area for taking notes, with a prompt: 'Take notes about this record to keep track of important info. You can even @mention a teammate if you need to. [Learn more](#)'. On the right side of the interface, there are sections for 'Contacts (0)', 'Companies (0)', and 'Deals (0)'. A modal window titled 'Note' is open in the foreground. It has a header 'Note' and a close button. The modal contains a text input field with the placeholder 'For NABH'. Below the input field, there is a text area with the placeholder 'Hotel reservation confirmed at ...'. Below the text area, there is a rich text editor with various formatting options (bold, italic, underline, link, etc.) and a 'More' button. Below the rich text editor, there is a section titled 'Associated with 1 record'. Below this section, there is a checkbox labeled 'Create a To-do task to follow up In 3 business days (Friday)'. At the bottom of the modal, there is a 'Create note' button, circled in red, and a 'Draft saved' status indicator.

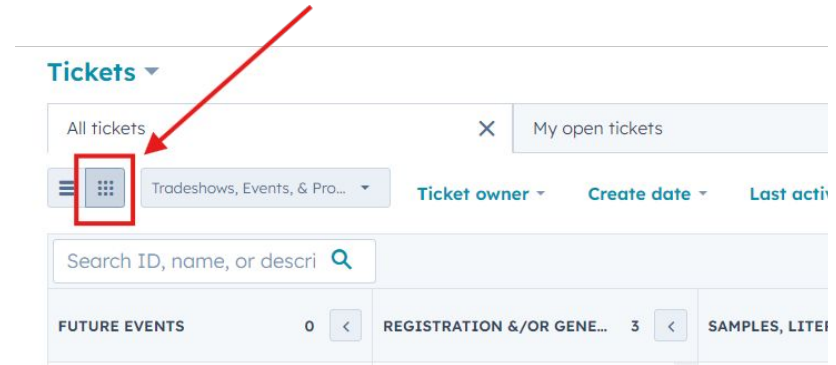
Objective:

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.

The screenshot displays a Jira Tickets board interface. At the top, there are buttons for 'Actions', 'Import', and 'Create ticket'. Below these, a search bar contains 'All tickets'. The board is organized into columns representing different stages of a ticket's lifecycle: 'FUTURE EVENTS', 'REGISTRATION &/OR GENE...', 'SAMPLES, LITERATURE, SHO...', 'SOCIAL MEDIA PROMOTION', 'LEAD FOLLOW UP', and 'CLOSED'. The 'CLOSED' column is highlighted with a red circle. Each column has a count of tickets and a left arrow icon. The 'CLOSED' column shows a count of 0. Below the column headers, there are three ticket cards. The first card is for 'National School Safety Conference' with a close date of 08/01/2025 and a high priority. The second card is for 'ASHE Conference' with a close date of 07/31/2025 and a high priority. The third card is for 'NASRO 2025' with a close date of 07/31/2025 and a high priority. Each card also shows the ticket owner as Elizabeth Cahill and the task status as 'No activity scheduled'.

Tickets ▾

All tickets X My open tickets Unassigned tickets + Add view (3/50) All Views

Tradeshows, Events, & Pro... Ticket owner Create date Last activity da... Priority Advanced filters (0)

Search ID, name, or descri 🔍 Board options ▾

FUTURE EVENTS 0 < REGISTRATION &/OR GENE... 2 < SAMPLES, LITERATURE, SHO... 1 < SOCIAL MEDIA PROMOTION 0 < LEAD FOLLOW UP 0 < **CLOSED** 0 <

National School Safety Conference
Close date: 08/01/2025
Ticket owner: Elizabeth Cahill
High
No activity for 27 minutes
Task due in 3 months

ASHE Conference
Close date: 07/31/2025
Ticket owner: Elizabeth Cahill
High
Note an hour ago
! No activity scheduled

NASRO 2025
Open for 6 days
Ticket owner: Elizabeth Cahill
High
Task 3 hours ago
! No activity scheduled