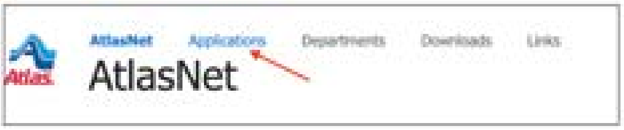
QUICKSTART GUIDE

Getting Started + Working Your Leads

STEP 1 - LOGGING IN VIA ATLASNET

1 Open [AtlasNet]

2 Click [Applications]



3 Click the [Corporate Marketing] icon

Bookmark the HubSpot dashboard in your browser for quick access.

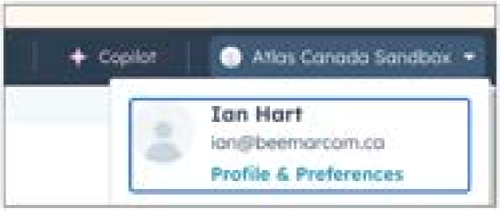
NOTE: Use your AtlasNet SSO login—no new credentials required.

4 Click the [HubSpot] icon

STEP 2 -SET UP PROFILE & PREFERENCES

After logging in:

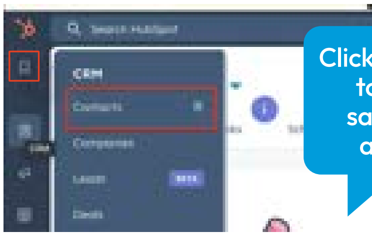
- Click your [profile icon] (top right corner)
- Select [Profile & Preferences]



- Set your **timezone**, **name format**, and **preferred notifications**

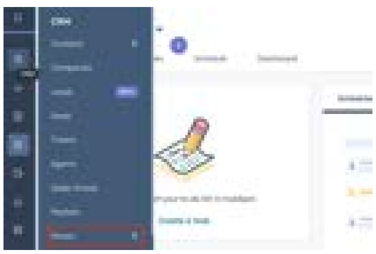
STEP 3 - NAVIGATING HUBSPOT

CONTACTS
View and manage contact records

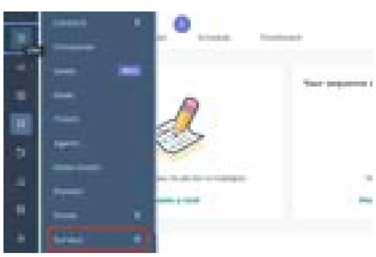


Click the bookmark to ensure it is saved for easy access later.

MOVES
View and manage move opportunities (Deals)



SURVEYS
Connected to Yembo and move surveys



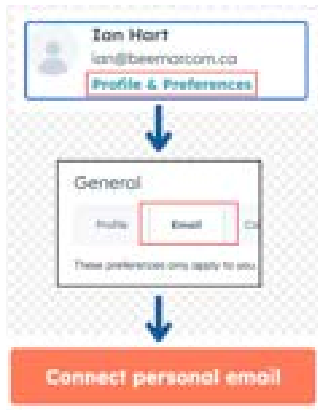
TASKS
Create and track follow-ups

Use task reminders to stay on schedule

STEP 4 - CONNECT YOUR EMAIL & CALENDAR

To enable email tracking and meeting scheduling:

- Go to **Settings > Integrations > Email & Calendar**
- Select **Outlook** or **Gmail**
- Follow the prompts to connect both



Once connected, your emails and meetings will sync automatically to HubSpot records.

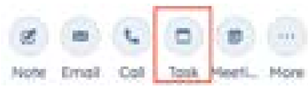
STEP 5 - HOW LEADS ENTER HUBSPOT

- Leads flow automatically from **AtlasNet** into HubSpot
- Look under **Moves** to find new leads

- Details may include **contact info**, **move location**, **date**, and **survey link** (if applicable)
- Yembo survey integration is visible where available

STEP 6 - WORKING A LEAD – KEY ACTIONS

Open a lead record and perform the following:

Action	Where to Do It	Why It's Important
Assign Yourself	Top of lead record	Establishes ownership
Send Email	Left panel > Email 	Initiate contact using a template or custom message
Log Call or Note	Left panel > Call or Note 	Track activity for future reference
Set a Task	Left panel > Tasks 	Schedule follow-up
Schedule Meeting	Left panel > Meeting 	Use connected calendar for client calls

Reminder: Leads must be contacted within 2 hours of receipt (during business hours).

STEP 7 - USING THE PREBUILT LEAD RESPONSE SEQUENCE

You do not need to build your own. Use the assigned sequence for consistent follow-up:

Steps to Use:
- Open the lead
- Click the **Sequences** tab
- Select **Intro Call Sequence**

Sequence will:
- Send templated email with calendar link
- Remind you to follow up if no response
- Guide you to either book a survey or call again
- Move lead to pipeline or mark as unresponsive

STEP 8 - PRACTICE BEFORE YOU LOG OFF

Complete the following during practice time:
- Find a lead in your pipeline
- Assign it to yourself
- Send an email or log a note
- Create a follow-up task

Need Help?

Atlas HubSpot Support Contact:
hubspotsupport@atlasvanlines.ca

Training Team Contacts:
Peter Brown, Ian Hart,
Jackie McCulloch, Abbie Lawrie

Next Session Preview:
- Creating and managing move records
- Organizing your day with tasks
- Viewing your performance with dashboards