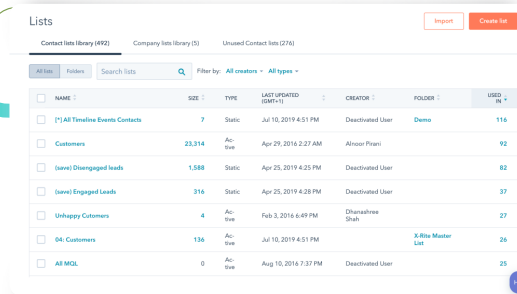


Viewing HubSpot Records

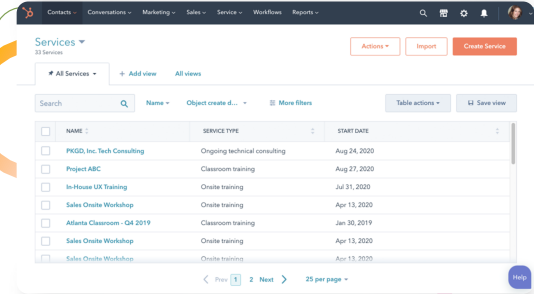


Lists

Contact lists library (192) | Company lists library (5) | Unused Contact lists (276)

Actions | Folders | Search lists | Filter by: All creators | All types

NAME	SIZE	TYPE	LAST UPDATED (GMT+1)	CREATOR	FOLDER	USED BY
[*] All Timeline Events Contacts	7	Static	Jul 10, 2019 4:51 PM	Deactivated User	Demo	116
Customers	23,314	Active	Apr 29, 2016 2:27 AM	Alison Pagan		92
(saved) Disengaged Leads	1,588	Static	Apr 25, 2019 4:25 PM	Deactivated User		82
(saved) Engaged Leads	316	Static	Apr 25, 2019 4:28 PM	Deactivated User		37
Unhappy Customers	4	Active	Feb 3, 2016 4:49 PM	Dhanashree Shah		27
04: Customers	136	Active	Jul 10, 2019 4:51 PM	X-Rite Master Ltd		26
All MQL	0	Active	Aug 16, 2016 7:37 PM	Deactivated User		25



Services

20 Services | Add view | All views

Search | Name | Object create d... | More filters | Table actions | Save view

NAME	SERVICE TYPE	START DATE
PSGD, Inc. Tech Consulting	Ongoing technical consulting	Aug 24, 2020
Project ABC	Classroom training	Aug 27, 2020
In-House UX Training	Onsite training	Jul 31, 2020
Sales Onsite Workshop	Onsite training	Apr 13, 2020
Atlanta Classroom - Q4 2019	Classroom training	Jan 30, 2019
Sales Onsite Workshop	Onsite training	Apr 13, 2020
Sales Onsite Workshop	Onsite training	Apr 13, 2020

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LISTS VS VIEWS

What's the use case?

AUTOMATION

Lists are crucial for taking action on groups of contacts, such as sending marketing emails or setting up automation workflows.

EFFICIENCY

Views are a powerful sales tool for sorting data, identifying target groups, and streamlining sales efforts. They allow for quick and easy access to information, helping teams stay organized and productive.

Can I segment my records?

YES, LIMITED

Lists help you segment, but only for contacts and companies. There are two types of Lists: Static Lists do not update as new or existing records meet/no longer meet the List criteria. Active Lists automatically update when records meet or leave the criteria needed for the List.

YES

Views can be used with all of HubSpot's standard objects (contacts, companies, deals, tickets, and custom objects), as well as some HubSpot-defined objects (calls, marketing events, and target accounts) This versatility makes it easy to drill down into specific properties for analysis and reporting.

Can I bulk-send marketing emails?

YES

You can use Lists to segment your contacts and then use the email functionality within HubSpot to send targeted campaigns to specific groups of contacts.

NO

Views are used to filter and sort contacts, they do not have the functionality to send bulk marketing emails.

Can I enroll someone in an automation workflow?

YES

You can set up automation workflows that trigger based on specific List membership. For example, you can create a List of "New Leads" and enroll contacts that meet those criteria into a welcome email automation workflow.

NO

While Views are useful for the organization and analysis of your data, they do not have any direct functionality for workflow automations or reporting. Instead, Views can help you identify certain segments of your data that you may want to include or exclude from your automation workflows or reporting. Note that you can use Views to put a bulk list of contacts in a sequence, however!

Do I need to be on a paid plan or specific Hub?

NO

Creating and using Lists are available on all HubSpot products and plans.

NO

Viewing and filtering records are available on all HubSpot products and plans.