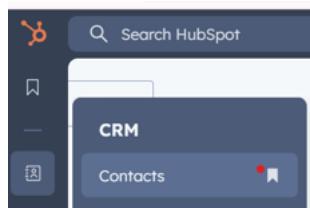


WMTD HubSpot What New


1. If you need any help with HubSpot, all Help Documents are stored in HubSpot under Files in the HubSpot Help Documents folder.
(added 5/2/2025)
2. If your Contacts tab shows an All Contacts view, please “X” it out. If it continues to get added automatically, disregard it. This view shows individuals who reach out to the Office for information on WMTD and is beyond our scope of Facilities, Dogs and Members. (added 5/2/2025)
3. When you open HubSpot on your laptop/desktop and you see a screen other than Contacts with the Facilities, Dogs, Members tabs, you need to change your Default Homepage (You only need to do this the first time you logon).
 - Click West Michigan Therapy Dogs in the upper right corner
 - Click Profile & Preferences
 - Scroll down until you see Defaults and select Contacts
 - Click Save
 - Then click the 2nd icon on the left panel and click Contacts:

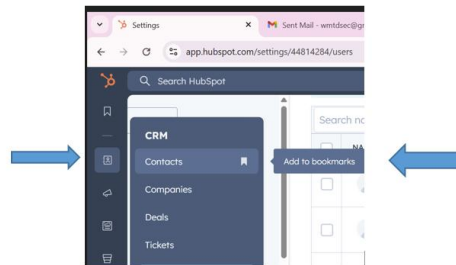


(added 5/2/2025)

WMTD HubSpot What New

4. Occasionally HubSpot may present a pop-up that asks your role in HubSpot, if so click on Sales. It also occasionally requires you to enter an authorization code that it sends via a text message to your cell phone, or your email, or if you have the Mobile app it may require you to open the Mobile app. It usually does this if you sign on with a new device. (added 5/2/2025)

5. HubSpot recently changed the look of their Laptop/Desktop Home Page which moved Files to a new icon. Consequently the steps for Creating Bookmarks has changed. If you previously created Bookmarks, no changes are needed. If you haven't already created Bookmarks, please follow these instructions:
 - a. When you click on Contacts (the 2nd icon on the left panel), and scroll to the right, you will see a ribbon symbol  on the far right. Clicking on this symbol will create a Bookmark.



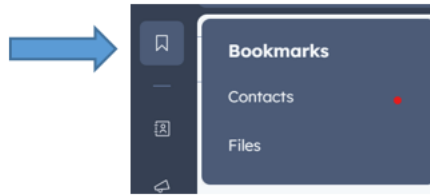
- b. Scroll down to the Content icon (the fourth icon on the left panel), and click on the Bookmark symbol to the right of Files.



- c. Now that you have created the Bookmarks, when you click on the Bookmark icon (the 1st icon on the left panel), you will see Contacts

WMTD HubSpot What New

and Files. Now you only need to click on the 1st icon (Bookmarks) to see the two menu options needed for WMTD in HubSpot.



(added 5/2/2025)