

# QUICKSTART GUIDE

## Getting Started + Working Your Leads



### STEP 1 - LOGGING IN VIA ATLASNET

#### 1 Open [AtlasNet](#)



#### 2 Click [Applications](#)

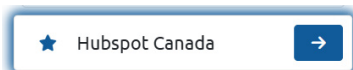


#### 3 Click the [Corporate Marketing](#) icon



Corporate Marketing

#### 4 Click the [HubSpot](#) icon



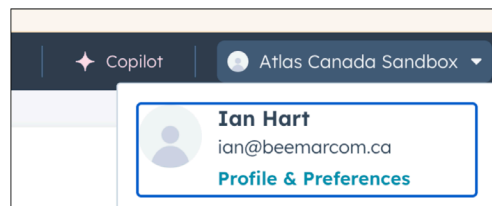
Bookmark the HubSpot dashboard in your browser for quick access.

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

### 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**

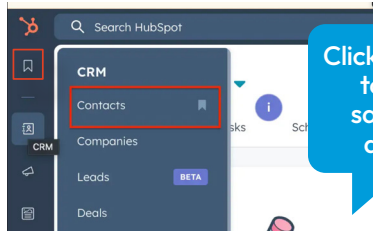


## STEP 3 - NAVIGATING HUBSPOT



### CONTACTS

View and manage contact records

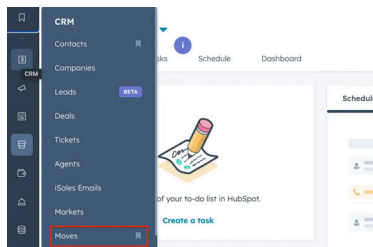


Click the bookmark to ensure it is saved for easy access later.



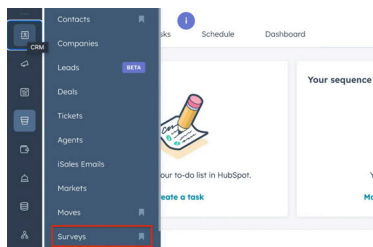
### MOVES

View and manage move opportunities (Deals)



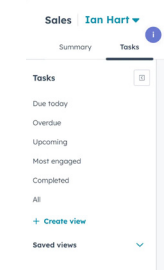
### SURVEYS

Connected to Yembo and move surveys



### TASKS

Create and track follow-ups

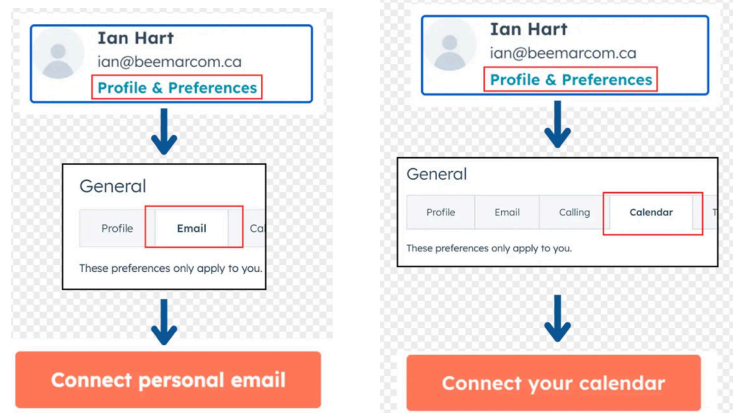


Use task reminders to stay on schedule

## 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

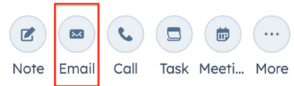
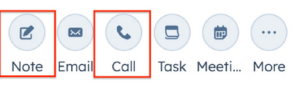
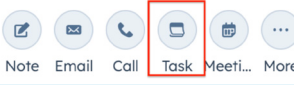
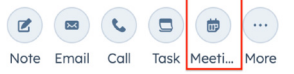
- Leads flow automatically from **AtlasNet** into HubSpot
- Look under **Moves** to find new leads

CONTACT EMAIL	OBJECT CREATE DATE/TIME	OWNER	RECORD SOURCE	RECORD SOURCE DETAIL
joshh@beemarcom.ca	Jul 2, 2025 9:30 PM EDT	Peter Brown (peter@beemarcom.ca)	CRM UI	--
jamie@hubspot.ca	Jul 2, 2025 9:30 PM EDT	Peter Brown (peter@beemarcom.ca)	CRM UI	--
joshh@beemarcom.ca	Jul 2, 2025 9:27 PM EDT	Peter Brown (peter@beemarcom.ca)	CRM UI	--
morris@beemarcom.ca	Jul 2, 2025 9:24 PM EDT	Peter Brown (peter@beemarcom.ca)	CRM UI	--
markw@hotmail.com	Jun 25, 2025 4:16 PM EDT	Peter Brown (peter@beemarcom.ca)	CRM UI	--
peter@beemarcom.ca	Jun 25, 2025 1:43 PM EDT	Peter Brown (peter@beemarcom.ca)	CRM UI	--
emilmaria@hubspot.com	Jun 24, 2025 2:18 PM EDT	Julie Capithorne (julie@beemarcom.ca)	CRM UI	--
lh@hubspot.com	Jun 24, 2025 2:17 PM EDT	Julie Capithorne (julie@beemarcom.ca)	CRM UI	--

- 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