

BOUNDARY MINING GROUP SALES SOP NEW RECORDS

INTRODUCTION

Tools Used: Excel, Emails

Purpose

To ensure consistent and accurate creation of company, contact, and task records in HubSpot, enabling reliable data, clear ownership, and effective tracking of sales activities across teams.

Scope

This SOP applies to all users responsible for creating and managing company, contact, and task records within HubSpot, including Outside Sales, Inside Sales, and support teams involved in customer and opportunity management.



DATE
05/20/2026

APPLIES TO
Sales Team

Detailed Procedure – Create New Company and Contact

1. Create a Company in HubSpot

Navigate to the "**Companies**" section → "**Add Companies**" and "**Create New**"

Add:

- Company Domain - website
- Company Name
- Site ID
- Category (Dealer, End-User, Vendor)
- Lead Source
- Industry – Market ID
- Country / Region

2. Create Contact in HubSpot

Navigate to the "**Contacts**" section → "Add Contacts" and "**Create New**"

Add:

- Email Address
- First Name
- Last Name
- Lead Source
- Job Title
- Contact Owner
- Mobile Phone Number
- Phone Number
- Associate with the company created in 1.1

||| How to associate a contact with a company:

When a contact is created, the contact window will open, navigate to the right-hand side, "**Companies**", and click "**Add**", find the company and click "**Next**" and then click "**Save**".

⚠ Important: You can create a new contact directly in your company card and that will automatically skip the association step.

Create New Task:

Navigate to the "**Tasks**" section → "**Create Task**" and add:

- Task title
- Task Type
- Priority
- Associate with Records
- Assigned to
- Due Date and time
- Reminder
- Notes