

BOUNDARY MINING GROUP GENERAL RESOURCES

FILES, MARKETING MATERIALS, INVENTORY, CALENDAR LINKS

INTRODUCTION

Tools Used: HubSpot CRM

Purpose

To provide clear guidance on how to access and use files, marketing materials, inventory information, and scheduling tools within HubSpot, enabling sales teams to efficiently support customer interactions and maintain consistency in communication.

Scope

This SOP applies to all Outside Sales and Inside Sales team members using HubSpot to access marketing resources, review inventory information, and manage customer scheduling activities.



DATE
05/20/2026

APPLIES TO
Sales Team

Detailed Procedure – Access Files & Marketing Materials

1. Find the resources available to you

Navigate to the "**Content**" section → "**Files**"

Review:

1. Marketing Documents
2. File Templates
3. Logos
4. Renders
5. Visual PDFs
6. Sales Call Report PDF

1.1. Marketing Documents

Under Marketing Documents, you will find:

- Sales Documents
- Installation Manuals
- Bill of Materials

When you click on the document you want to visualize, a side window will open.

You can choose to share that information with your customer by sharing a link or downloading the document.

Option 1 – Share a link:

Under File URL, you will select Share Internal Link, Preview File Link, or Share 24-hour Link. After selecting one of these options, you will click "Copy URL".

Option 2 – Download the document:

You can also decide to download the file (if available), by clicking "More" and then "Download".

⚠ Important: Keep in mind that by sharing a link with your customer will give you insights if they opened the file or not, as the system can track that. If you download and attach the file to an email you will not have that information.

Check inventory:

Navigate to the **"Products"** section → choose between "All Products" or one of the other views created to facilitate finding related products.

Check:

- Name - Boundary Part Number
- New Description – Product Description
- Qty on Hand
- OEM number

⚠ Important: Inventory shown in HubSpot may include items already allocated to existing deals. Do not rely on this view to confirm availability or make commitments to customers. This tool should be used for reference only to support customer conversations.

Suggested communication regarding inventory is:

"I can see in our system that we may have inventory available. I will confirm with our Sales Support team to ensure it is not already allocated before confirming."

Connect your calendar:

Navigate to the **"Sales"** section → **"Meetings Scheduler"**

1. Connect your calendar
Create a scheduling page:
 - Select - One-on-One