User Permissions and Admin Roles in HubSpot

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1. Introduction

In the realm of customer relationship management (CRM) and inbound marketing, managing user permissions and roles efficiently is crucial for maintaining security and productivity. HubSpot, a leading CRM platform, provides robust tools to manage these permissions and roles. This whitepaper aims to offer an in-depth understanding of how to configure and manage permissions and admin roles within HubSpot.

2. Overview of HubSpot Permissions

HubSpot permissions are categorized to provide granular control over what users can access and modify within the platform. Properly setting these permissions ensures that users have the necessary tools to perform their duties without exposing sensitive information.

CRM Permissions

CRM permissions govern access to customer relationship management tools. These include:

- Contacts: Permissions to view, edit, and delete contact records.
- Companies: Manage company records with similar permissions.
- Deals: Access and manage deal records.
- Tickets: Oversee and handle support tickets.
- Tasks and CRM Emails: Manage tasks and emails within the CRM.

- Notes and Invoices: Edit and view notes and invoices.
- Communicate: Add emails, calls, or meetings to CRM records.
- Bulk Delete: Ability to delete multiple records simultaneously.
- Import/Export: Import and export CRM data.
- Custom Views: Create and manage custom data views.
- Customize Layout: Adjust the layout of CRM content.

Detailed CRM Permissions

- Contacts and Companies: Permissions can be set to either view, edit, or delete records. For example, a sales representative might have the ability to view and edit contacts but not delete them.
- Deals: Users can be granted access to manage the entire lifecycle of a deal, from creation to closure. This includes permissions to update deal stages, associate deals with contacts, and modify deal properties.
- Tickets: Permissions include the ability to create, view, edit, and close support tickets. This is crucial for customer service teams who need to track and resolve customer issues effectively.
- Notes and Invoices: Permissions include creating and editing notes on CRM records and managing invoices, ensuring accurate financial tracking and communication.
- Communicate: Users can log interactions such as calls, emails, and meetings with contacts, helping maintain a comprehensive communication history.
- Bulk Delete: Allows users to delete multiple records at once, useful for data clean-up but should be restricted to prevent accidental data loss.
- Import/Export: Permissions to import new data into the CRM or export data out for reporting and analysis.
- Custom Views: Users can create personalized views of CRM data tailored to their specific needs.
- Customize Layout: Adjust the interface layout to highlight the most relevant information for specific roles.

Marketing Permissions

Marketing permissions control access to marketing tools:

- Lists: View and edit marketing lists.
- Forms: Create and edit forms.
- Files: Manage uploaded files.
- Marketing Access: General access to all marketing tools.
- Ads: Manage advertising accounts and campaigns.
- Campaigns: Create and manage marketing campaigns.

- Marketing Emails: Permissions for creating, editing, and publishing emails.
- CTAs: Manage calls-to-action.
- Marketing SMS: Handle SMS marketing messages.
- Social Media: Control social media accounts and publishing.
- Content Staging: Manage staged content for review and approval.

Detailed Marketing Permissions

- Lists: Permissions to create dynamic and static lists for segmenting contacts based on various criteria.
- Forms: Manage forms for lead capture, including creating, editing, and embedding them on websites.
- Files: Permissions to upload and organize files within HubSpot, ensuring all marketing assets are easily accessible.
- Marketing Emails: Access to create, edit, and send marketing emails, including A/B testing and performance tracking.
- Campaigns: Manage entire marketing campaigns, including setting goals, tracking performance, and coordinating various marketing activities.
- Ads: Permissions to connect ad accounts (e.g., Google Ads, Facebook Ads) and manage ad campaigns directly from HubSpot.
- Social Media: Manage social media accounts, schedule posts, and monitor social media engagement and performance.
- Content Staging: Allows marketers to stage content changes before they go live, ensuring accuracy and quality.

Sales Permissions

Sales permissions provide access to tools needed for managing sales processes:

- Create Custom Line Items: Add custom items to deals or quotes.
- Manage Quote Templates: Create and edit templates for quotes.
- Manage Payment Links: Oversee links used for payments.
- Manage Payments and Subscriptions: Handle transactions and subscriptions.
- Sales Access: General access to all sales tools.
- Templates: Manage sales templates.
- Meeting Scheduling Pages: Create and manage meeting scheduling pages.
- Forecast: View and edit sales forecasts.
- Playbooks: Manage sales playbooks.
- Sequences: Create and bulk enroll sequences.
- Prospecting: View other users' prospecting workspaces.

Detailed Sales Permissions

- Custom Line Items: Allows sales reps to add bespoke products or services to deals, tailoring quotes to client needs.
- Quote Templates: Manage standardized quote templates, ensuring consistency and professionalism in sales documents.
- Payment Links: Create and manage payment links for seamless transactions.
- Sales Forecasting: Permissions to view and adjust sales forecasts, helping sales leaders track progress against targets.
- Playbooks: Develop and manage playbooks that guide sales reps through best practices and sales strategies.
- Sequences: Automate follow-up sequences, improving efficiency and ensuring timely communication with prospects.
- Prospecting Workspaces: Access to view and manage prospecting activities, facilitating collaboration and oversight.

Service Permissions

Service permissions control access to customer support tools:

- Feedback Surveys: Manage customer feedback surveys.
- Knowledge Base Articles: Create and edit knowledge base articles.
- Templates: Manage service templates.
- Meeting Scheduling Pages: Create and share meeting scheduling pages.
- Service Tools Access: General access to all service tools.

Detailed Service Permissions

- Feedback Surveys: Create and manage surveys to gather customer feedback and measure satisfaction.
- Knowledge Base: Develop and maintain articles that provide self-service support to customers.
- Service Templates: Standardize responses and communications with service templates.
- Meeting Scheduling: Manage scheduling pages for support appointments, ensuring customers can easily book time with service representatives.
- Service Tools Access: Comprehensive access to all service-related tools, enabling efficient handling of customer inquiries and issues.

Account Permissions

Account permissions manage administrative functions:

- Marketing Contacts Access: Manage marketing contacts.
- Personal Email Access: Send and track CRM emails.
- App Marketplace Access: Install apps from the marketplace.
- Asset Marketplace Access: Install modules and templates.
- Permanently Delete Contacts: Ability to permanently delete contacts.
- Edit Property Settings: Manage CRM property settings.
- Subscription Type Settings: Handle subscription types.
- Global Content Settings: Edit global content settings.
- Website Settings: Manage website and SEO settings.
- Manage Product Library: Oversee the product library.
- Knowledge Base Settings: Edit knowledge base settings.
- Customer Portal Settings: Manage customer portal settings.
- Reports & Dashboards: Create and manage reports and dashboards.
- Domain Settings: Manage domain connections.

Detailed Account Permissions

- Property Settings: Customize properties for contacts, companies, deals, and tickets to fit organizational needs.
- Subscription Types: Manage email subscription types and preferences.
- Global Content: Control global content modules and themes used across various HubSpot tools.
- Website Management: Oversee website settings, including SEO tools and domain configurations.
- Product Library: Maintain and update the product library, ensuring accurate and up-to-date product information.
- Customer Portal: Customize and manage settings for the customer portal, providing a personalized support experience.
- Reports and Dashboards: Full control over creating and managing dashboards and reports, enabling detailed analytics and insights.

Reporting Permissions

Reporting permissions provide access to reporting and analytics tools:

- Goals: View, create, and edit goals.
- Data Quality Tools Access: Monitor and clean data quality.
- Reports Access: Manage reports and analytics tools.
- Reporting Datasets: Access and edit reporting datasets.

- Marketing Reports: Access marketing analytics tools.

Detailed Reporting Permissions

- Goals Management: Set, track, and adjust organizational goals, aligning efforts across teams.
- Data Quality: Monitor data quality, identify issues, and take corrective actions to ensure accurate data.
- Reports Creation: Create customized reports to analyze various aspects of business performance.
- Analytics Tools: Access advanced analytics tools for in-depth data analysis and insights.