HubSnacks

How to Start Using Your HubSnacks Portal: A Step-by-Step Guide

Introduction

Welcome to your HubSnacks subscription. We're happy that you're joining us. And we just wanted to send you a Step-by-Step guide to help you get started with using your HubSnacks platform and what we have available for you so you can start submitting your tasks.

In this guide, we will walk you through your HubSnacks portal and show you how to optimize it for your growth. And how to efficiently submit your tickets so we can complete them for you with the best quality as fast as you need. So we can help you squeeze every drop of value from your HubSpot subscription.

Let’s get started

This how the HubSnacks platform looks when you log in:

1. After you log in to your account on the above right corner, you can find your account name and edit your profile tab.
2. On the main menu, you can find:
   - JuiceBar.
   - Your Tasks.
   - SnackBar.
3. Right below, you can see where to submit a task and check task status.

So, what is the JuiceBar?

It is like knowledge-based articles. There's a bunch of articles that you can access and use if you are uncertain of something, also if you need to know about something and you want to just see how you can find it yourself.

That would include things like - how to:

- Update your credit card information,
- Access your billing account.

NB. (Your HubSnacks billing account is separate from this particular account. Anything that you need to submit separately relating to billing would be done in a different location.

To Access your billing account:

- Click on “Access Your HubSnacks Billing Account”
- There's a link there that will redirect you to where you can do all of the logistics regarding your account in terms of upgrading, downgrading, canceling, updating credit card details, viewing invoices, and so on.
- If you do have any billing queries, this would be where you go.

When it comes to submitting a new task:

1. Click submit a task from the home page:
2. In the “HubSnacks Task Type” field, you will see these three different types of tasks:

HubSpot Task	Anything related to HubSpot you need us to do for you
SnackBar Template	That would be when you've preselected one of our ready-to-go templates, and you want us to match it with your brand and build It, in your HubSpot portal.
Core Settings Audit	A complimentary audit on the settings in your HubSpot portal, Which we do for all HubSnacks customers.

Let's just go through each task:

1. HubSpot Task

Field	Options
HubSnacks Task Type	Choose HubSpot task.
Which category does your task relate to?	A new tab will appear when you choose a HubSpot task • You can see a list of options relating to the menus in HubSpot that would cover, for example, a blog or sales or marketing. • So, in this case, because we're going to the workflow, that's automation, so we'll select automation.
Which HubSpot feature does your task relate to?	Then we will have a drop-down menu that says sequences or workflows. We know it's going to be workflows. So select that.
Task Type	Create or modify workflow.
Is this task part of a project with related tasks or HubSpot campaign?	You have the option of letting us know if this is going to be related to a HubSpot campaign in your portal. If you are running campaigns, you do have the option of asking us to associate a task with a campaign.
Do you have more than one HubSpot portal or website?	Most of our clients won't have more than one portal, but if you do here, we'd say yes. And you would specify which portal.
Name Your Task	Then you want to name your task. And here, the key is to be unique. Not only because it helps us keep an eye on your task, but because once this task is closed, if you ever wish to refer to it or reopen it, it's going to be very difficult - If you didn't give it a name that makes sense.
Your Work Email	Your email should be here.
Describe Your Task Fully	Describe your task.
Attach a file	You have the option here of attaching a file, which will then help us to complete the task. The more information you provide us with, the less likely it is that we're going backward and forward with you.

- **Once you've populated this and attach the file (if you wish to do so), you would say submit, and this would then show up as a task in your tasks.**

2. SnackBar Template Task:

The SnackBar is where all of our pre-created templates exist. You can select the one you like. We will rebrand it for you with your brand. Then we build it in your portal. And this usually takes about three working days. **So, let's say you wanted an email template:**

1. In the SnackBar, you can find all our email templates. They have different styling depending on what you might want to do.

2. Choose a template.

3. You'll see on the preview page an order code. This order card helps us to identify the template selected and to make sure that we build the correct template in your portal.

4. So when you submit a task like this, you'd say, copy order number. And then, you go back to the HubSnacks platform to submit your task and, you would paste that order code in the Order Code field.

5. You would then complete the rest of this as per the previous HubSpot task example and submit it.

6. Because it's got an order code, this will automatically show up on our side internally, and we'll know what you've selected, and we'll go forward and build it for you.

3. Core Settings Audit Task:

That is a complimentary audit on the settings in your HubSpot portal, which we do for all HubSnacks customers.

- We go through about 60 different settings in your HubSpot portal.

- The purpose of this audit is to highlight sittings that you can change in a very quick time. That will maximize how HubSpot is working for you.

- When you get this, you will see that the state has been populated based on the outcomes of your portal:

    - If it’s optimized, the status color will be green.
    - If you need to review your settings, the status color will be yellow.
    - If you need to update your HubSpot settings, you will see critical, and the status color will be Red.

- After reviewing your report, if you decide that you need help adjusting your settings, submita task for us, and we will help you.
    - Choose Core Settings Audit Task.
    - From your report, copy the order code of the task you need help with to use it for your task summation
    - Follow the same steps as the SnackBar template task, and because this task has an order code that will tell us exactly what it is that we need to do for you.

Task Statuses:

We do have a bunch of statuses that occur when we are doing triage for our customers and planning their various tasks. You would see these statuses. If you go to your tasks, this is where you would see the tickets that you've submitted. You can see your open or pending, resolved, or closed tasks.

So, the following status is what you might see and what you should note.

<table>
<tr><th>Status</th><th colspan="2">What it means</th></tr>
<tr><td>Received pending initial review</td><td colspan="2">We have received your task, and we are reviewing it internally. And we'll be getting back to you with an estimated time and any requests for more information that we need.</td></tr>
<tr><td>In triage</td><td colspan="2">We haven't accepted the task yet. We are either internally looking at it, or we're waiting on feedback from you before we can accept it.</td></tr>
<tr><td>Task accepted in queue pipe full</td><td colspan="2">You got the maximum amount of active tasks from your subscription, and we've added it to your task queue.</td></tr>
<tr><td rowspan="3">Task active</td><td rowspan="3">We’ve accepted the task, and itmight be:</td><td>In progress.</td></tr>
<tr><td>In final QA.</td></tr>
<tr><td>Completed, and we need you to check it.</td></tr>
<tr><td>Task active waiting on your feedback</td><td colspan="2">We have accepted your task, and we're working on it. But we've reached a point where we now need something from you.</td></tr>
<tr><td>Your message received, pending next review</td><td colspan="2">When you message us on a ticket, you will see that until we've read your message and taking action.</td></tr>
</table>

If you're a Concierge client or a Snacks plus client, we will try and monitor your queues. But generally speaking, proactive task management is something of a team effort between you and us. We will do our best to ensure that you constantly have tasks flowing through, but we do also ask our customers to let us know what they would like us to do for them as well.

If you have got questions:

If you've got a question on something, if anything is unclear, or there's anything wrong where you're struggling, you need only ask, and we'll be too happy to take it up with you and to cover what needs to be covered with you.

- If you have got a question on something, you can always submit a ticket as a question, and that won't count towards your active tasks.
- So you would choose the HubSpot task. And choose which HubSpot feature does your task is related to - Is it a HubSpot question or a HubSnacks question?
- You would then complete the same form and ask us the question. And we would try and get back to you ASAP with a response.

Finally, these are some tips:

- It is very important that you make sure that you have added the number of users that you want to add as a part of the workflow.
- We also cover adding new users, so at any point, if you've forgotten how to do that, you can send it to us as a message, and we will help you do that and make sure that you've got users that are actively working on your tasks on your side as well.
- It's always good to have a backup person, in case that the main contact person is not available for any reason, so your tasks never delay. If you've got more than one person that can give feedback, that's great.
- If you elect to have two-factor authentications on your HubSpot account at any given point after you've given us access, you will lock us out. So in case, you need to enable two-factor authentication. Please let us know, and we can take you through the steps of making sure we don't lose access.
- In case you want to remove something from your HubSpot portal, we will always give you the option of deleting it yourself, as we never deleted anything in your HubSpot portal unless you specifically asked us to do.

Upgrading or Downgrading Your Subscription:

To upgrade or downgrade your HubSnacks Subscription, you need to log into your HubSnacks Billing Account.

You can access your HubSnacks Billing Account here - https://www.hubsnacks.com/my-account/
Note: This is different from where you manage any of your HubSpot Tasks. If you are having problemslogging into your account, please submit a billing support ticket here

What Happens When I Upgrade or Downgrade?

- If you have **downgraded**, this will apply at the **next** billing period.
- If you have **upgraded**, this will apply **immediately** and will be pro-rated for the remaining days ofthe current billing cycle.

Steps for Upgrading or Downgrading Your Subscription:

- Login to your HubSnacks Billing Account.
- Click on "**Subscriptions**" in the menu.
- Under "**Actions**" click on the green button that says "**Upgrade or Downgrade**".
- On the following screen, tick the box of subscription you would like to upgrade or downgrade to and press "**Add to Cart**".
- On “**Basket**”, confirm your order and press "**Proceed to checkout**".
- On the checkout screen, confirm your billing details and add your credit card, and press "**Sign up Now**".
- A notification will be sent to the HubSnacks team, and your request will be done in the next few hours.

What is a HubSnacks Recipe?

A HubSnacks Recipe is a group of predefined HubSpot Tasks that can be ordered with a single click to deliver a specific use-case capability.

That includes:

Stage	Recipe	Preview
Attract	Blog	https://app.funnelflows.com/projects/public/1c286776cfc4348dedfa83aa1336830c#R1c286776cfc4348dedfa83aa1336830c
	Pillar page	https://app.funnelflows.com/projects/public/2005b92744c8f8ca6512dc453ac6f4fd#R2005b92744c8f8ca6512dc453ac6f4fd
Engage	Book A Meeting, Book A Call, Book A Demo	https://app.funnelflows.com/projects/public/cfa65cee0414d2d430641cc34cb5b090#Rcfa65cee0414d2d430641cc34cb5b090
	Content Download	https://app.funnelflows.com/projects/public/430d878cdef8255ce3de456beeeaab13#R430d878cdef8255ce3de456beeeaab13
	Live Webinar	https://app.funnelflows.com/projects/public/81ac3ffb87f8f576a7f0b975c66fdc93#R81ac3ffb87f8f576a7f0b975c66fdc93
Delight	NPS, Knowledge Base	**Coming Soon**