

THE CRM CARD PLAYBOOK

*Your most complex business cases,
built on top of HubSpot's UI.*

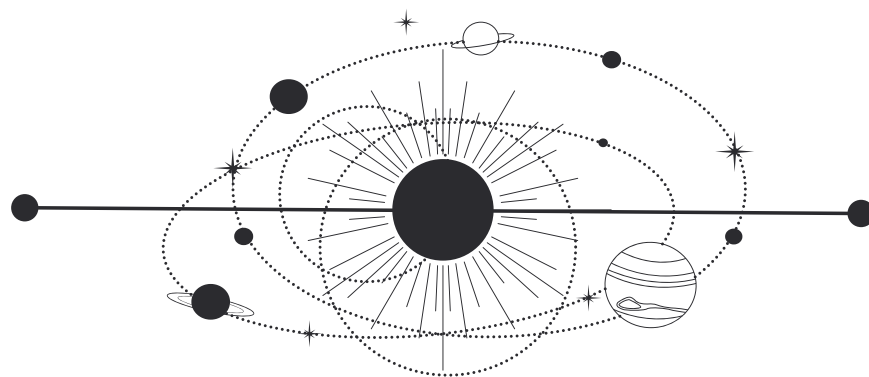


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Intro to the Playbook

CRM cards are micro-applications that live on your CRM record pages. They extend HubSpot's functionality beyond what you can do with out-of-the-box functionality. With CRM Cards, your team can complete tasks that would usually require them to access multiple systems, entirely within HubSpot.



When to use a CRM Card

There are three types of problems that CRM cards are excellent solutions for:



Accessing & Actioning Data from External Sources

These types of CRM cards show you data from outside of HubSpot or allow you to action data by adding or editing data that exists elsewhere.

For example, a Sensitive Information Retrieval card allows you to retrieve credit card information that is stored in a PCI-compliant vault outside of HubSpot.



Creating a Customized Output Based on a Series of Inputs

These types of cards ask a set of questions and, based on your answers, provide you with a response.

For example, a CPQ card asks you questions about products, bundles, and pricing, and provides you with a custom-built quote.



Record-Specific Reports

These types of cards will show reports that are specific to that contact, company, deal, or other record.

For example, a web visits report could show you a timeline of a single contact's website activity.

Some cards will combine these multiple types of functionality.

For example, an Inventory Management card will access current inventory levels from an external system, let you select which ones you want, add them as line items to a deal, and then reduce the amount of inventory in your external system.

CRM Card Options

React vs. JSON

CRM cards can be coded with React or JSON.

React offers more flexibility and design elements, but is early in beta development, while JSON is more stable.

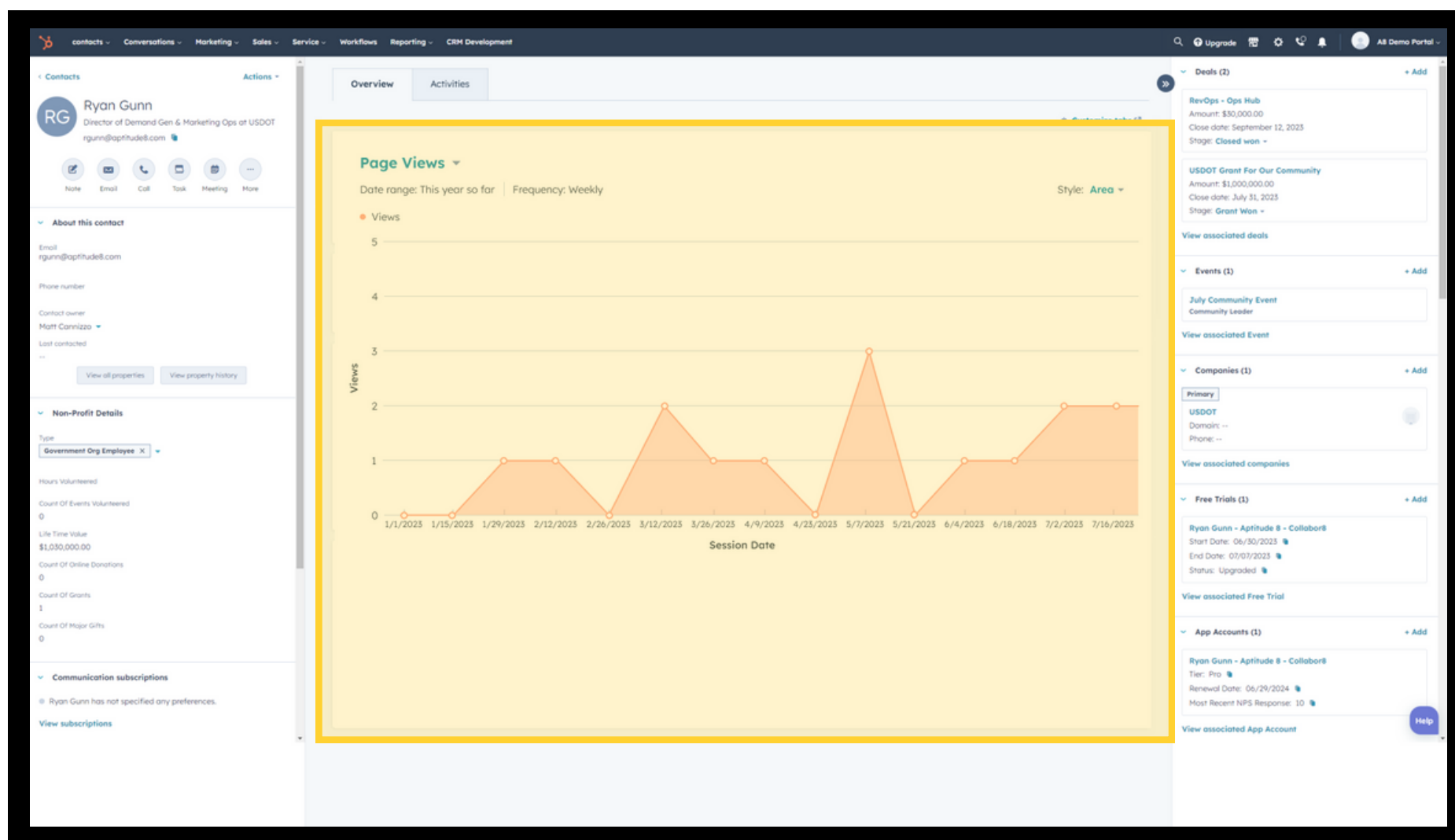
Embedded vs. Iframe

CRM cards can be embedded into the HubSpot record and appear as a native UI element or can pop up as an iframe, which allows for more complex processes and customization.



Where do CRM Cards go?

CRM Cards live on Contact, Company, Deal, Ticket or Custom Object records. These cards are accessible in the middle of your record, where you would find your “Overview” section.



Permissions to view and interact with CRM cards can be restricted by role, team, or user to ensure that your team only has access to the tools they need in order to do their jobs.

CRM Card Use Cases

Save your team time, avoid errors associated with switching systems to complete simple tasks, and add functionality they need to complete their jobs. These are just a few examples of what is possible with CRM Cards:

Contact Cards

Sensitive Information Retrieval

HubSpot doesn't allow you to store sensitive data like credit card numbers, SSNs, passport numbers, or medical information. That means your team has to access multiple systems to complete certain tasks. This CRM card allows you to save and retrieve a contact's credit card information that is stored in a PCI-compliant vault without leaving HubSpot. The card opens the door for financial services, healthcare, and travel companies who may have been wary of HubSpot's data restrictions to embrace the platform and build it into their day-to-day processes.

PII Vault

Please enter the PII info below.

SSN ⓘ

Drivers License # ⓘ

Save PII

PII Vault

Social Security Number

Drivers License #

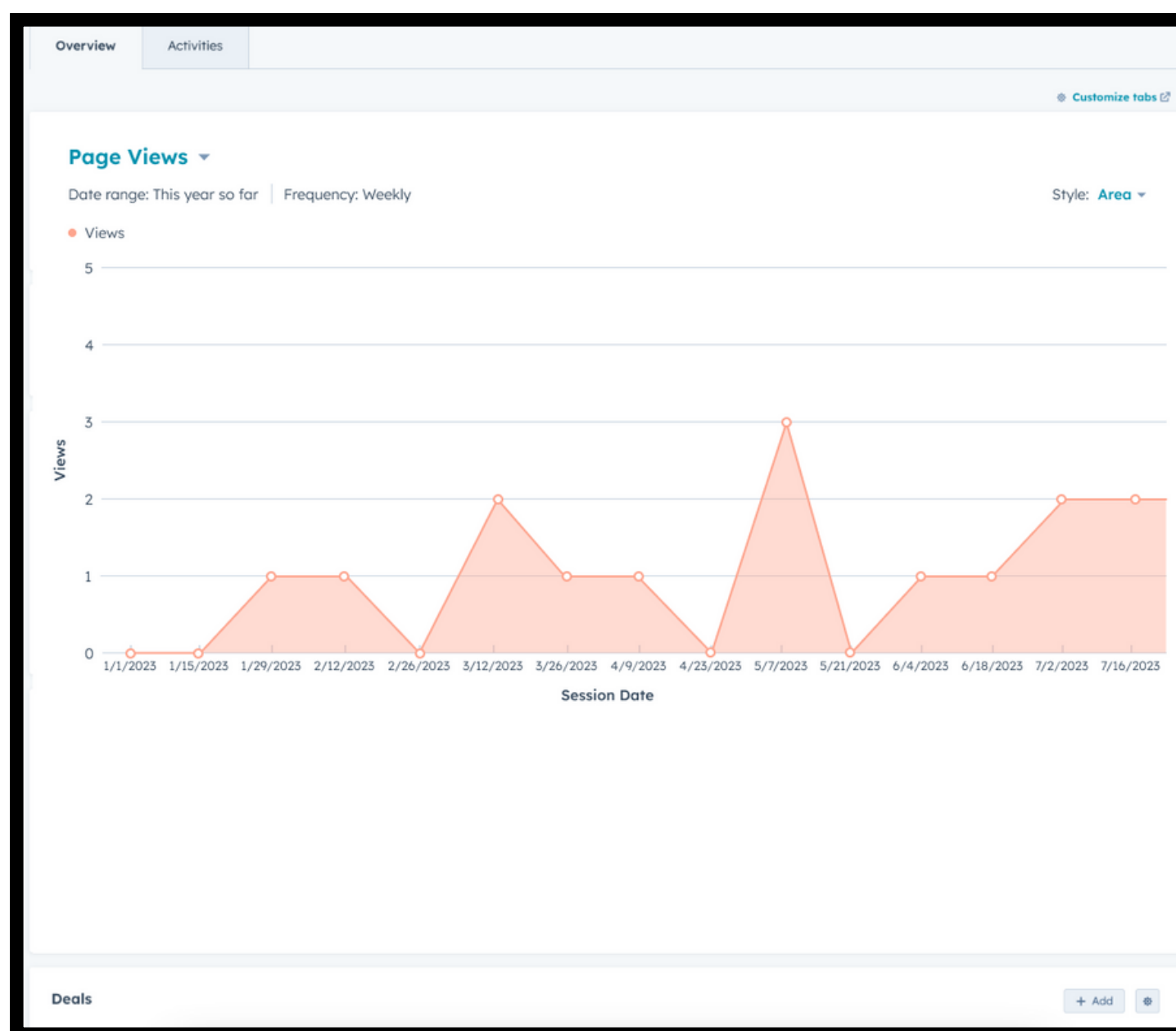
Un-obfuscate Data

CRM Card Use Cases

Contact Cards

Individual Contact Website Visits

A contact's website activity can be viewed in a feed, but there is no way to see a graph or visual timeline of a contact's website activity. This card shows the number of visits a contact has made to your website over time, with taller columns indicating more visits on a specific date.

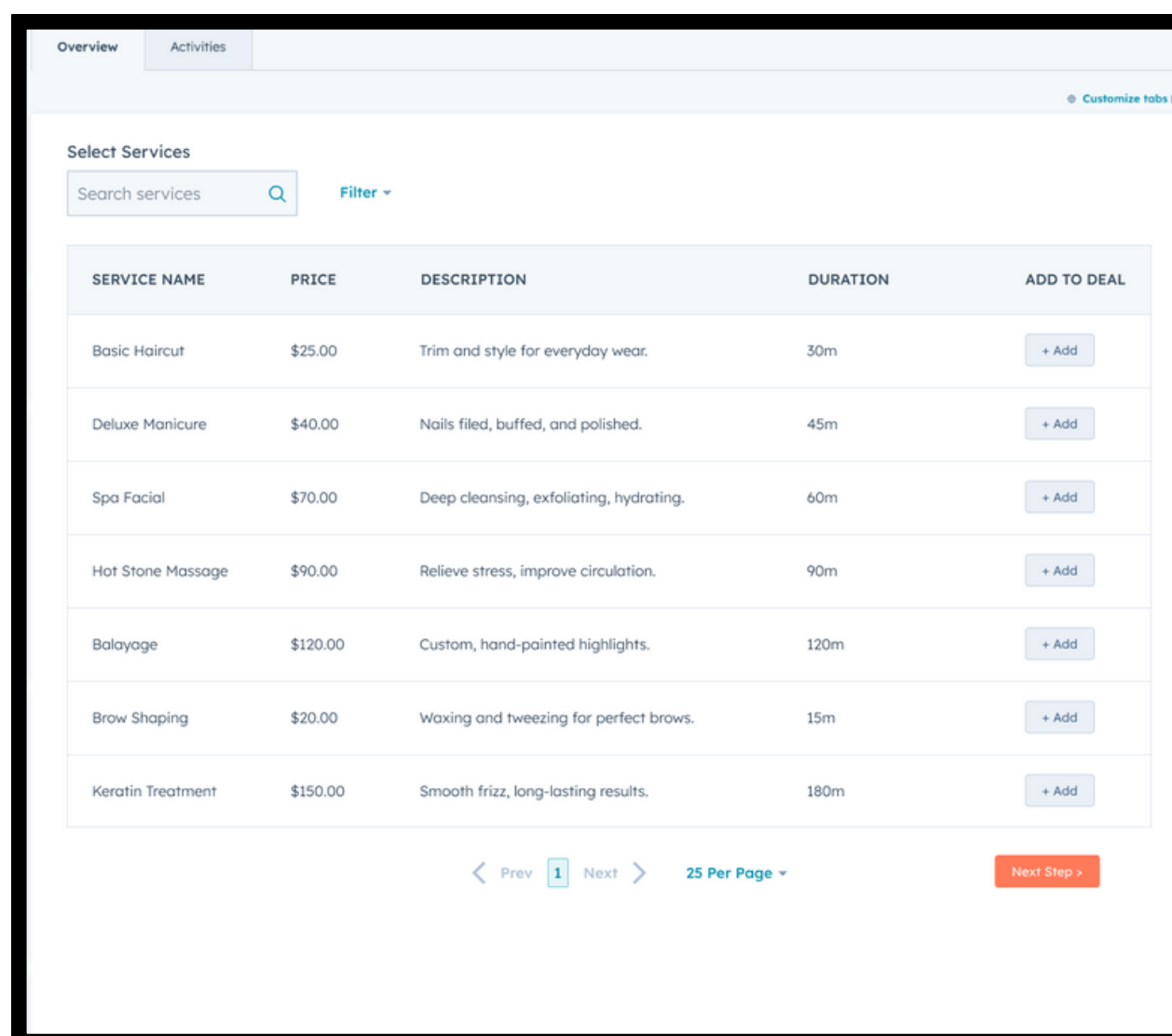


CRM Card Use Cases

Deal Cards

Appointment Scheduling

Companies that book time for services need to ensure they have an up-to-date view of the times and services that are available in order to avoid double booking.



The screenshot displays a CRM interface for appointment scheduling. At the top, there are tabs for 'Overview' and 'Activities', with 'Activities' selected. A 'Customize tabs' link is visible in the top right. Below the tabs is a 'Select Services' section with a search bar labeled 'Search services' and a 'Filter' dropdown. The main content is a table with the following columns: SERVICE NAME, PRICE, DESCRIPTION, DURATION, and ADD TO DEAL. The table lists seven services: Basic Haircut (\$25.00, 30m), Deluxe Manicure (\$40.00, 45m), Spa Facial (\$70.00, 60m), Hot Stone Massage (\$90.00, 90m), Balayage (\$120.00, 120m), Brow Shaping (\$20.00, 15m), and Keratin Treatment (\$150.00, 180m). Each row has a '+ Add' button. At the bottom, there are navigation controls: '< Prev 1 Next >' and '25 Per Page', along with a red 'Next Step >' button.

SERVICE NAME	PRICE	DESCRIPTION	DURATION	ADD TO DEAL
Basic Haircut	\$25.00	Trim and style for everyday wear.	30m	+ Add
Deluxe Manicure	\$40.00	Nails filed, buffed, and polished.	45m	+ Add
Spa Facial	\$70.00	Deep cleansing, exfoliating, hydrating.	60m	+ Add
Hot Stone Massage	\$90.00	Relieve stress, improve circulation.	90m	+ Add
Balayage	\$120.00	Custom, hand-painted highlights.	120m	+ Add
Brow Shaping	\$20.00	Waxing and tweezing for perfect brows.	15m	+ Add
Keratin Treatment	\$150.00	Smooth frizz, long-lasting results.	180m	+ Add

CRM Card Use Cases

Appointment Scheduling (Cont.)

This CRM card integrates real-time scheduling data from your scheduling system or POS into HubSpot's Deal record. It lets you select services, reserve time slots, and automatically updates the deal value, all within the same interface.

The screenshot displays the 'Appointment Scheduler' interface within a CRM card. The interface includes a navigation bar with 'Overview' and 'Activities' tabs, and a 'Customize tabs' link. The main content area is titled 'Appointment Scheduler' and shows a calendar for the week of August 13, 2023, to August 18, 2023. The calendar is organized by day and time slot. A red box highlights the 1 pm - 2 pm slot on Tuesday, August 15, 2023. Below the calendar, there is a 'Time Selected' field showing 'Tue, 8/15, 1 pm - 2 pm' and a 'Book Appointment' button.

	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19
8 am			Hope Johnson 8 am - 9 am				
9 am	Susan Jennings 9 am - 10 am			Victory Nelson 9 am - 10 am			
10 am				Amber Taft 10 am - 11 am			Libby Pratt 10 am - 11 am
11 am						Kim Burns 11 am - 12 pm	
12 pm					Becca Russo 12 pm - 2 pm		
1 pm		Sam Mills 1 pm - 2 pm				Joe Swanson 1 pm - 2 pm	
2 pm	Hillary Avery 2 pm - 3 pm	Holly Everett 2 pm - 3 pm	Missy Holden 2 pm - 3 pm				Angela Vasquez 2 pm - 3 pm
3 pm							

< Previous Step

Time Selected:
Tue, 8/15, 1 pm - 2 pm

Book Appointment

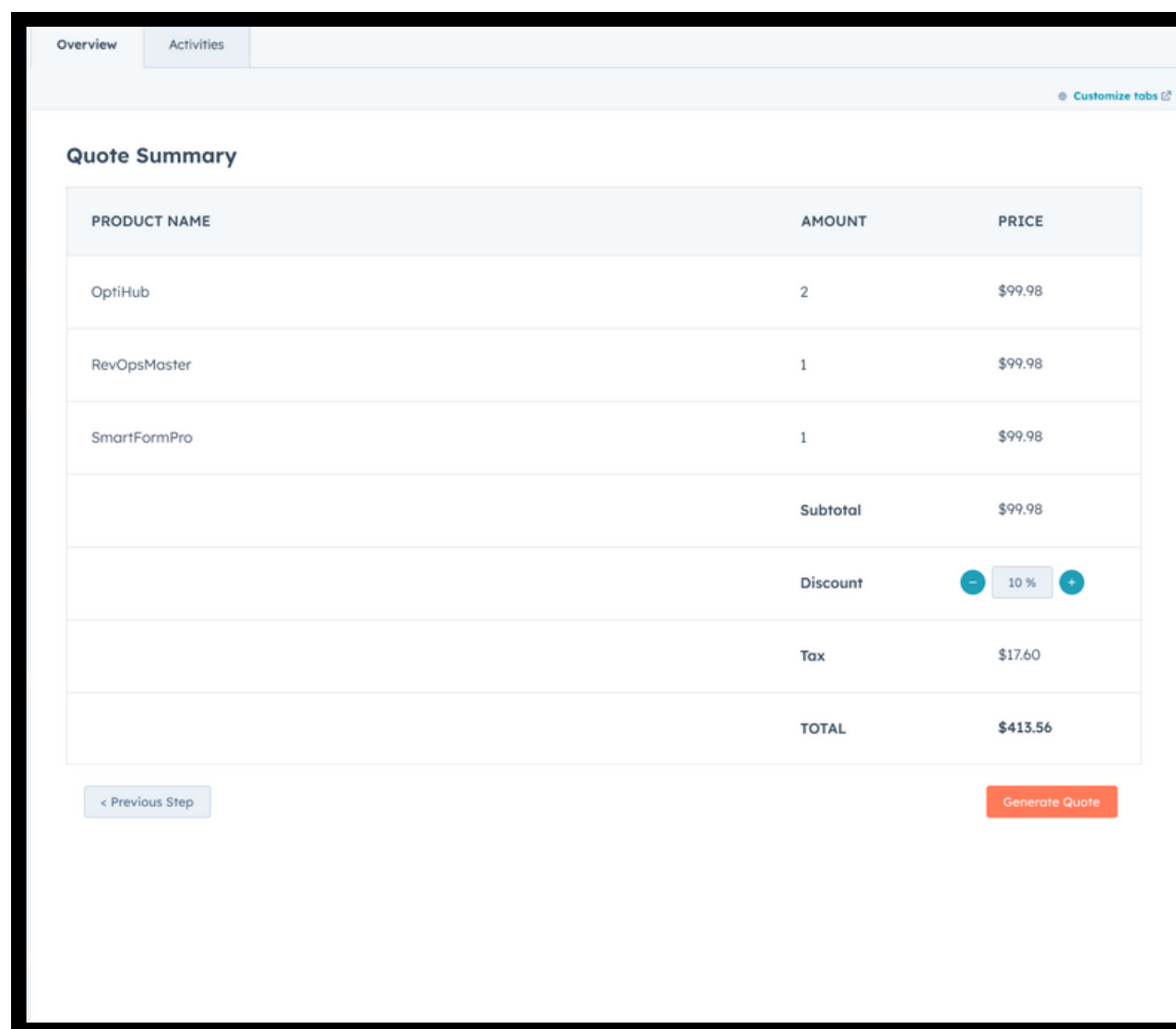
CRM Card Use Cases

Deal Cards

CPQ / Deal Builder

Without CPQ, companies face manual errors in quoting, inconsistent pricing, and delayed sales cycles. There's a risk of offering outdated or incompatible product configurations.

Sales reps waste time navigating complex pricing matrices and approval workflows, reducing time spent selling. Inconsistency in quotes erodes customer trust and affects deal quality. Poor data centralization impacts analytics, making revenue forecasting imprecise.



The screenshot displays a CRM interface for a quote summary. At the top, there are tabs for 'Overview' and 'Activities', and a 'Customize tabs' link. The main content area is titled 'Quote Summary' and contains a table with the following data:

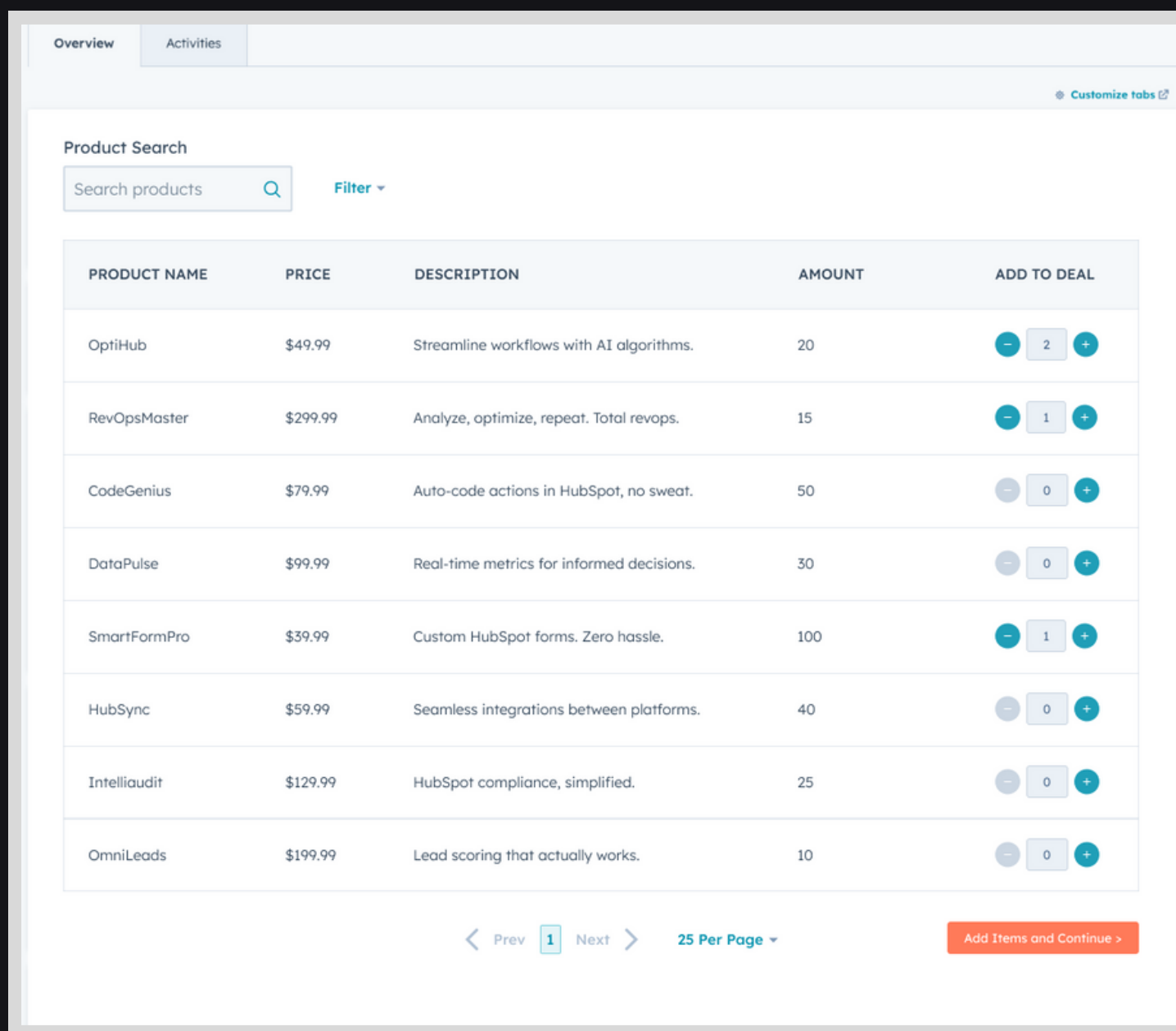
PRODUCT NAME	AMOUNT	PRICE
OptiHub	2	\$99.98
RevOpsMaster	1	\$99.98
SmartFormPro	1	\$99.98
	Subtotal	\$99.98
	Discount	10 %
	Tax	\$17.60
	TOTAL	\$413.56

At the bottom of the interface, there are two buttons: '< Previous Step' and 'Generate Quote'.

CRM Card Use Cases

CPQ / Deal Builder (Cont.)

This CRM card solves those problems by connecting directly with your ERP to get up-to-date pricing and automatically configures a quote directly in HubSpot. This significantly reduces errors and the amount of time your team has to spend building quotes, which means they can spend more time selling.



The screenshot displays a CRM Deal Builder interface. At the top, there are tabs for "Overview" and "Activities". Below the tabs is a "Product Search" section with a search input field labeled "Search products" and a "Filter" dropdown. The main content is a table with the following columns: "PRODUCT NAME", "PRICE", "DESCRIPTION", "AMOUNT", and "ADD TO DEAL". The table lists several products with their respective prices and descriptions. At the bottom of the table, there are navigation controls: "Prev", "1", "Next", and "25 Per Page". A red button labeled "Add Items and Continue >" is located at the bottom right of the interface.

PRODUCT NAME	PRICE	DESCRIPTION	AMOUNT	ADD TO DEAL
OptiHub	\$49.99	Streamline workflows with AI algorithms.	20	- 2 +
RevOpsMaster	\$299.99	Analyze, optimize, repeat. Total revops.	15	- 1 +
CodeGenius	\$79.99	Auto-code actions in HubSpot, no sweat.	50	- 0 +
DataPulse	\$99.99	Real-time metrics for informed decisions.	30	- 0 +
SmartFormPro	\$39.99	Custom HubSpot forms. Zero hassle.	100	- 1 +
HubSync	\$59.99	Seamless integrations between platforms.	40	- 0 +
Intelliaudit	\$129.99	HubSpot compliance, simplified.	25	- 0 +
OmniLeads	\$199.99	Lead scoring that actually works.	10	- 0 +

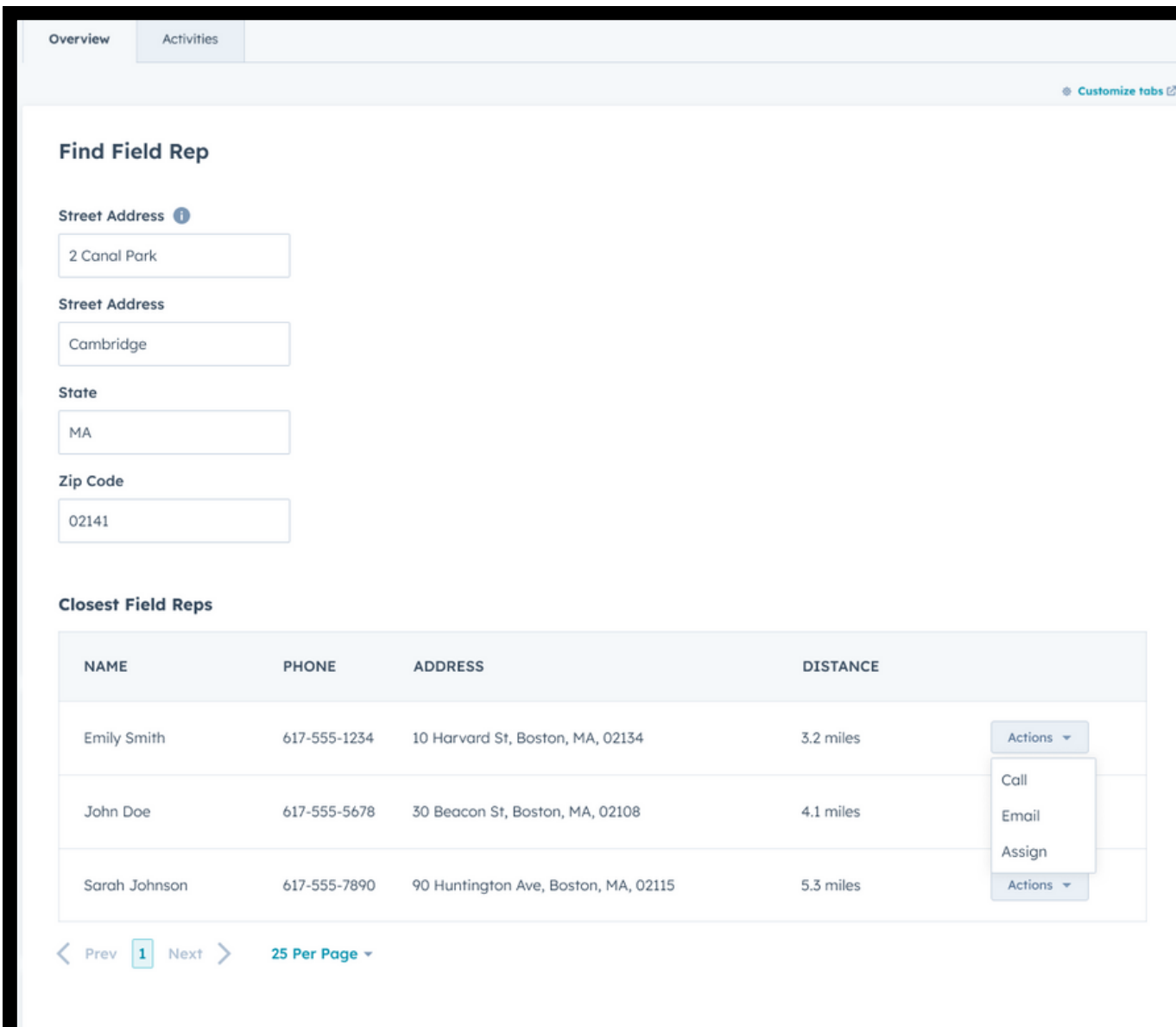
CRM Card Options

Company Cards

Location-based Field Rep Finder

Companies that operate in multiple geographic locations often need to connect prospects or clients to a field representative or office that is closest to them. This typically involves getting an address from the company and manually looking up which rep is closest by pulling up a map.

This card eliminates the manual lookup process by automatically identifying the closest rep when an address is entered by using Google Maps API.



The screenshot displays a CRM interface with a 'Find Field Rep' section. It includes input fields for 'Street Address' (2 Canal Park), 'City' (Cambridge), 'State' (MA), and 'Zip Code' (02141). Below the form is a table titled 'Closest Field Reps' with columns for NAME, PHONE, ADDRESS, and DISTANCE. The table lists three representatives: Emily Smith (3.2 miles), John Doe (4.1 miles), and Sarah Johnson (5.3 miles). Each row has an 'Actions' dropdown menu with options for 'Call', 'Email', and 'Assign'.

NAME	PHONE	ADDRESS	DISTANCE
Emily Smith	617-555-1234	10 Harvard St, Boston, MA, 02134	3.2 miles
John Doe	617-555-5678	30 Beacon St, Boston, MA, 02108	4.1 miles
Sarah Johnson	617-555-7890	90 Huntington Ave, Boston, MA, 02115	5.3 miles

CRM Card Use Cases

Ticket Cards

Create a new Slack Channel

When a customer submits a support ticket, the support manager may need to loop in multiple internal parties to get them the support they need.

Rather than switching to Slack and copying and pasting the contents of the support ticket, this CRM card allows your team to create a Slack channel/group message directly from the ticket record.

Overview | Activities | Slack Channel

Message in Slack Channel

Channel Title
#App-Won't-Load

Choose Team Members ⓘ
Choose team members

Selected Team Members:
Amy Harris X
Kevin Lexington X

Create Group Message >

Companies

Search

Association label - Company owner - Lead Status - Last Activity D... - Create Date -

COMPANY NAME	COMPANY DOMAIN NAME	PHONE NUMBER
Riverside	riversidecompany.com	+1 617-351-2800

Overview | Activities | Slack Channel

Message in Slack Channel

#App-Won't-Load 3

Spreadsheet +

Rich Edison 11:31 AM
Have you had a chance to look at this yet?

Amy Harris 11:32 AM
Yes - did you see the date of their last login?

Rich Edison 11:34 AM
No, but that could have something to do with this error.

Message #App-Won't-Load

Companies

Search

Association label - Company owner - Lead Status - Last Activity D... - Create Date -

COMPANY NAME	COMPANY DOMAIN NAME	PHONE NUMBER
Riverside	riversidecompany.com	+1 617-351-2800

Deals

CRM Card Use Cases

Ticket Cards

SLA Monitoring

Your Customer Support team needs to respond to requests in a timely fashion. If you've formalized that into an SLA, then your team needs a way to monitor whether they are honoring that agreement with the customer.

This card shows when the request came in, and how long your team has to complete various follow-up tasks in order to comply with the SLA, as well as buttons they can click to initiate those tasks.

The screenshot displays the 'SLA Monitor' interface within a CRM system. At the top, there are navigation tabs for 'Overview', 'Activities', and 'SLA Monitor'. Below the tabs, the 'SLA Monitor' section is titled and includes a 'Customize tabs' link. The main content area shows the following details:

- Request Date:** 8/27/2023
- Request Time:** 00:01:26 PM EST

Below this information, there are two sections: 'Closed Tasks' and 'Open Tasks', each containing a table of tasks.

Closed Tasks Table:

DESCRIPTION	TIME REMAINING TO MEET SLA	SLA MET	
Send Acknowledgment of Receipt	0 Days, 0 Hours	Yes	Actions

Open Tasks Table:

DESCRIPTION	TIME REMAINING TO MEET SLA	SLA MET	
Send Follow-Up	2 Days, 14 Hours		Actions

Both tables include pagination controls at the bottom, showing '1' items per page and a '25 Per Page' dropdown menu.

CRM Card Use Cases

BONUS: Custom Object Card

Trade Show Floor Plan

If you host conferences or trade shows and sell booth space for sponsorships, you need to know what booths are available and which are already taken so that you don't overbook or undersell the conference floor.

This card has a floor plan that shows what spaces are taken and which are available, as well as prices for each. When you select a booth space, you can search for a company to associate it with and it will automatically create a deal record for you to complete the sale.

The screenshot displays a CRM interface for booth selection. At the top, there are navigation tabs: "Overview", "Activities", and "Booth Selection". A "Customize tabs" link is visible in the top right. The main section is titled "Booth Selection" and includes a dropdown menu for "Which room are you looking for?" set to "Regency Room". Below this are radio buttons for "Available" (selected) and "Reserved". The floor plan consists of several booth options represented by circles and rectangles with associated prices:

- Two light blue circles on the left.
- A large teal rectangle with the price "\$1,500.00".
- A light blue square with the price "\$425.00".
- A light blue circle with the price "\$325.00".
- A teal rectangle with the price "\$1,500.00" (highlighted with a red border). A tooltip menu is open over it, showing "Actions" and "Reserve for a Company".
- A light blue square with the price "\$425.00".
- A light blue circle with the price "\$1,500.00".
- A teal square with the price "\$425.00".
- A light blue square.
- A light blue rectangle at the bottom left.
- Two teal circles with the price "\$325.00".
- A light blue square.
- A light blue square.

Extensibility Unlocked

Build with HubSpot's Extensibility features

Whatever business process you need, we can build it. Aptitude 8 has the largest technical consulting team in the HubSpot ecosystem and we'll work with you to come up with a custom solution.

Interested in learning more?

CRM Cards are just one way that we are extending the capabilities of the HubSpot platform.

Check out more extensibility configuration and automation capabilities at aptitude8.com/custom-crm-development.

Do you have business needs that HubSpot can't handle out of the box? Let's chat about whether CRM cards may be a fit to solve your problem!

Reach out to us at aptitude8.com/contact-us.

