HUBSPOT

How to Create a New Company and Add a Contact

Step-by-Step Companion Guide

Purpose	Create a complete HubSpot company record and associate a new contact with that company.
Use this guide when	Adding a new prospect or customer that is not already in HubSpot.
Before you begin	Have the company website/domain, main address, company details, and the contact's email and phone information available.

Important: Search first. Creating a duplicate company or contact makes reporting, ownership, and activity history less reliable.

Quick Process Overview

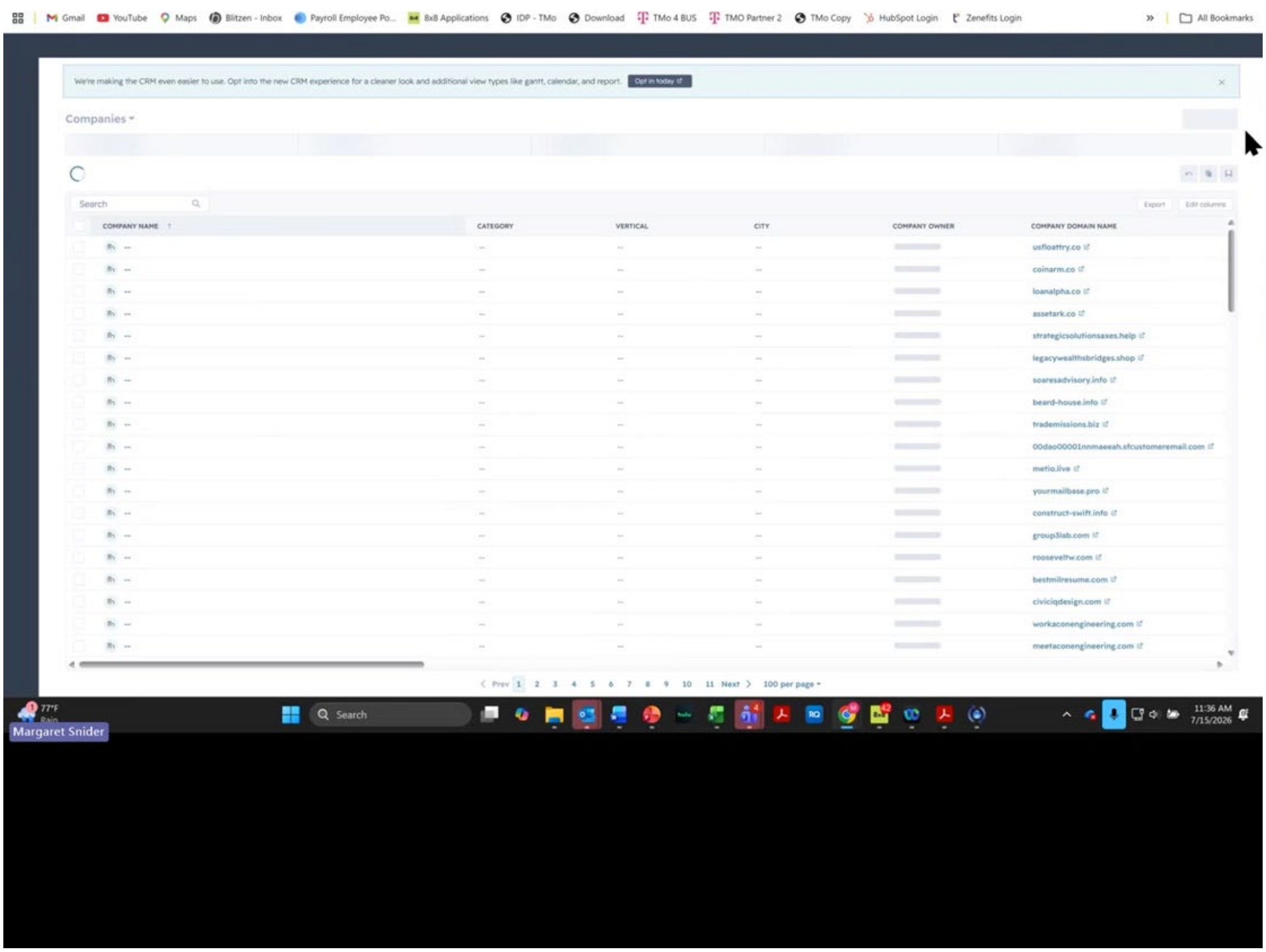
1. Search HubSpot to confirm the company does not already exist.
2. Open the Companies view and select Create company.
3. Enter the company domain first, then complete the required company properties.
4. Create the company and review the saved company record.
5. From the company record, select Add contact or Create contact.
6. Enter the contact's business information and confirm the company association.
7. Create the contact and verify that it appears on the company record.

Part 1 — Create the Company

STEP 1 Go to the Companies view

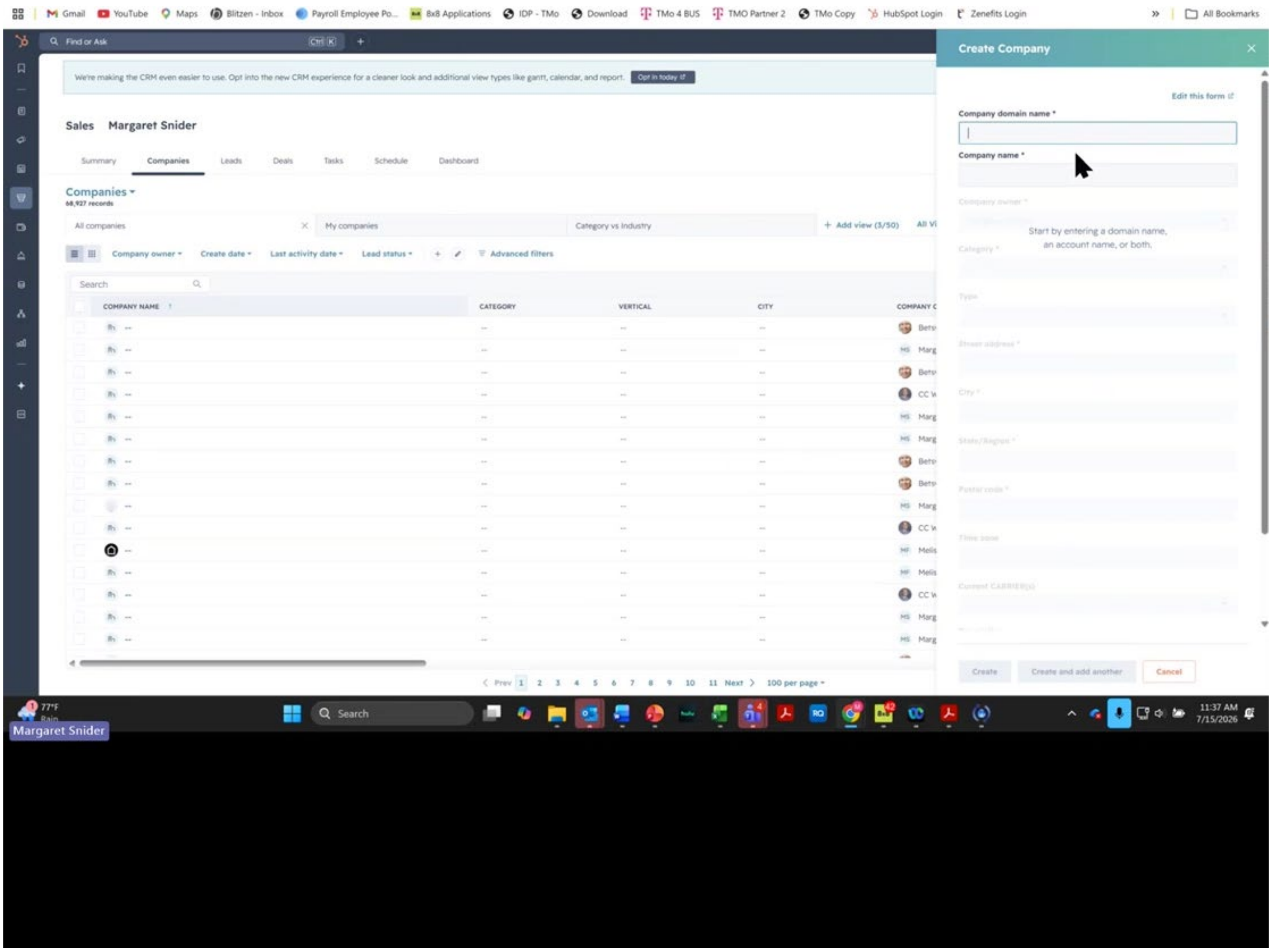
From the HubSpot Sales workspace, open the Companies tab. Use the company list to search existing records before creating anything new.

Tip: Search by both company name and website domain. A company may already exist under a slightly different name.



STEP 2 Select “Create company”

Click the Create company button in the upper-right area of the Companies page. HubSpot opens the Create Company panel on the right side of the screen.



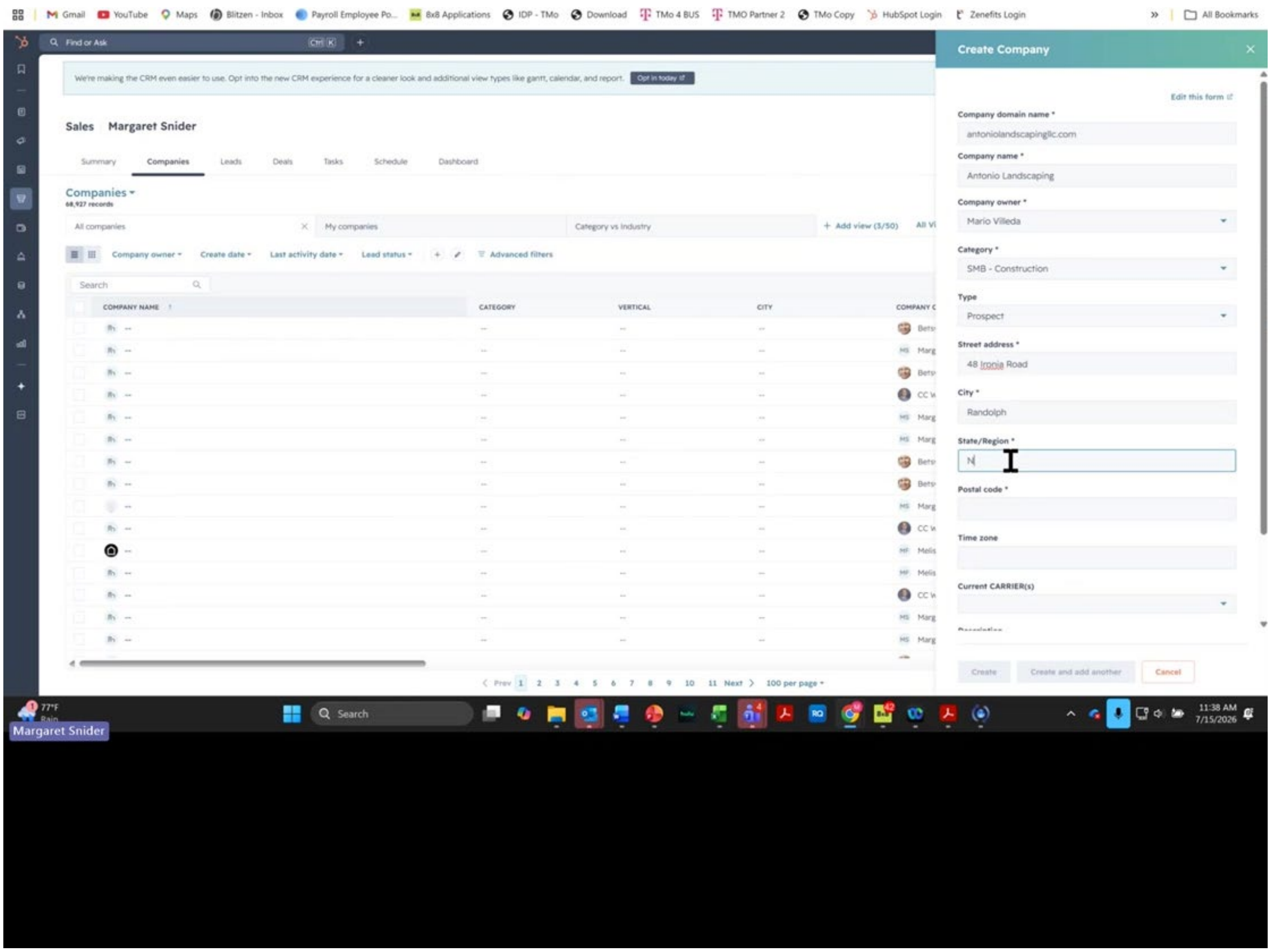
STEP 3 Enter the company domain name first

In Company domain name, enter the organization’s primary website domain (for example, company.com). HubSpot may use the domain to identify or populate available company information. Review any suggested information rather than assuming it is correct.

STEP 4 Complete the company name and classification fields

Confirm or enter the Company name. Complete the internal classification fields used by Premier Wireless, including Category, Type, and any vertical or lead-status fields shown on the form.

Use the approved HubSpot values.



STEP 5 Enter the company address and location details

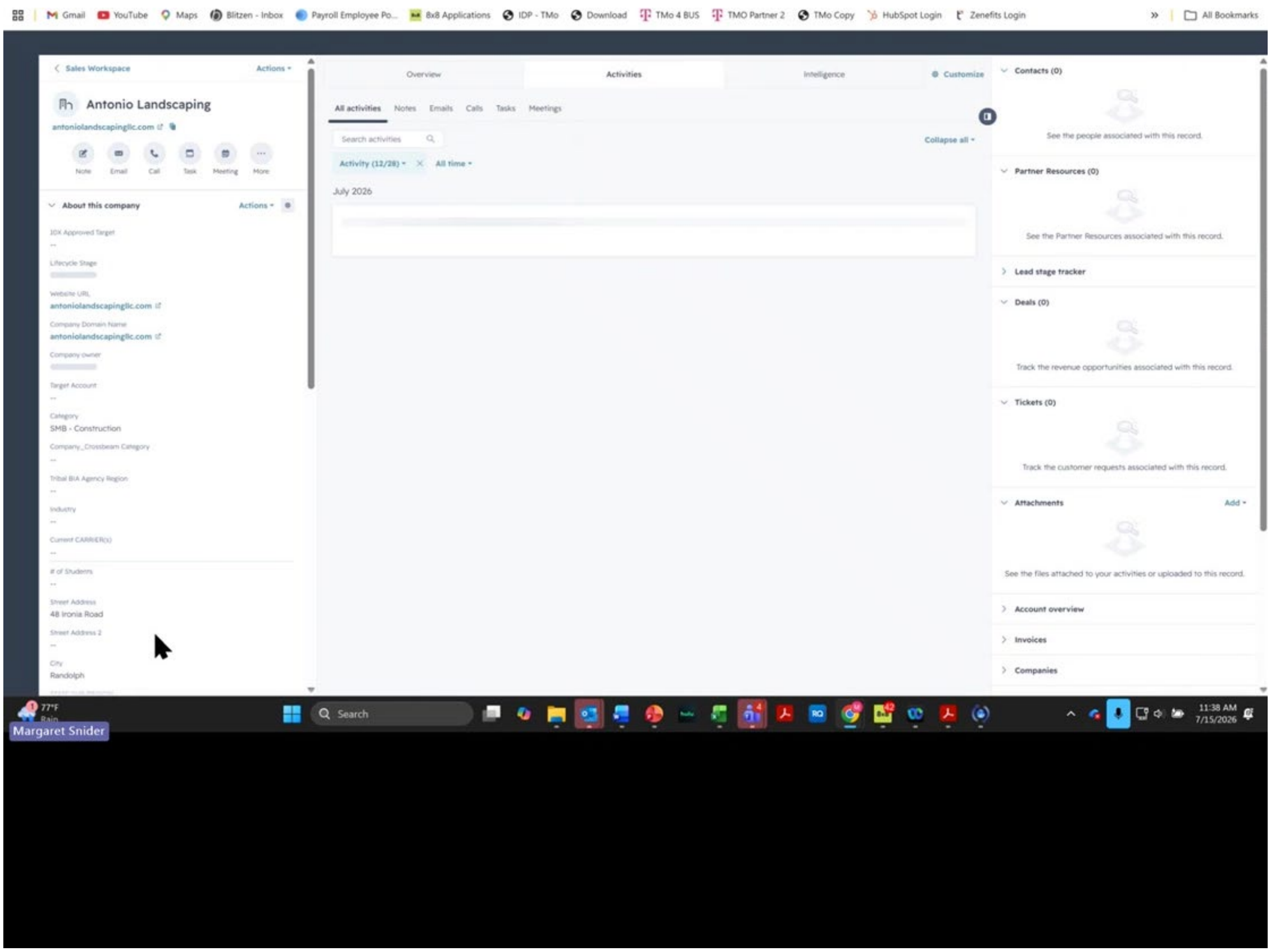
Complete Street address, City, State/Region, Postal code, and Time zone. Use the organization's physical or primary business location unless the sales process requires a different location.

STEP 6 Assign ownership and complete remaining required fields

Select the correct Company owner and complete any remaining required or relevant fields, such as current carrier, source, or other company-level properties included in the form. Scroll through the full panel so no required field is missed.

STEP 7 Create the company record

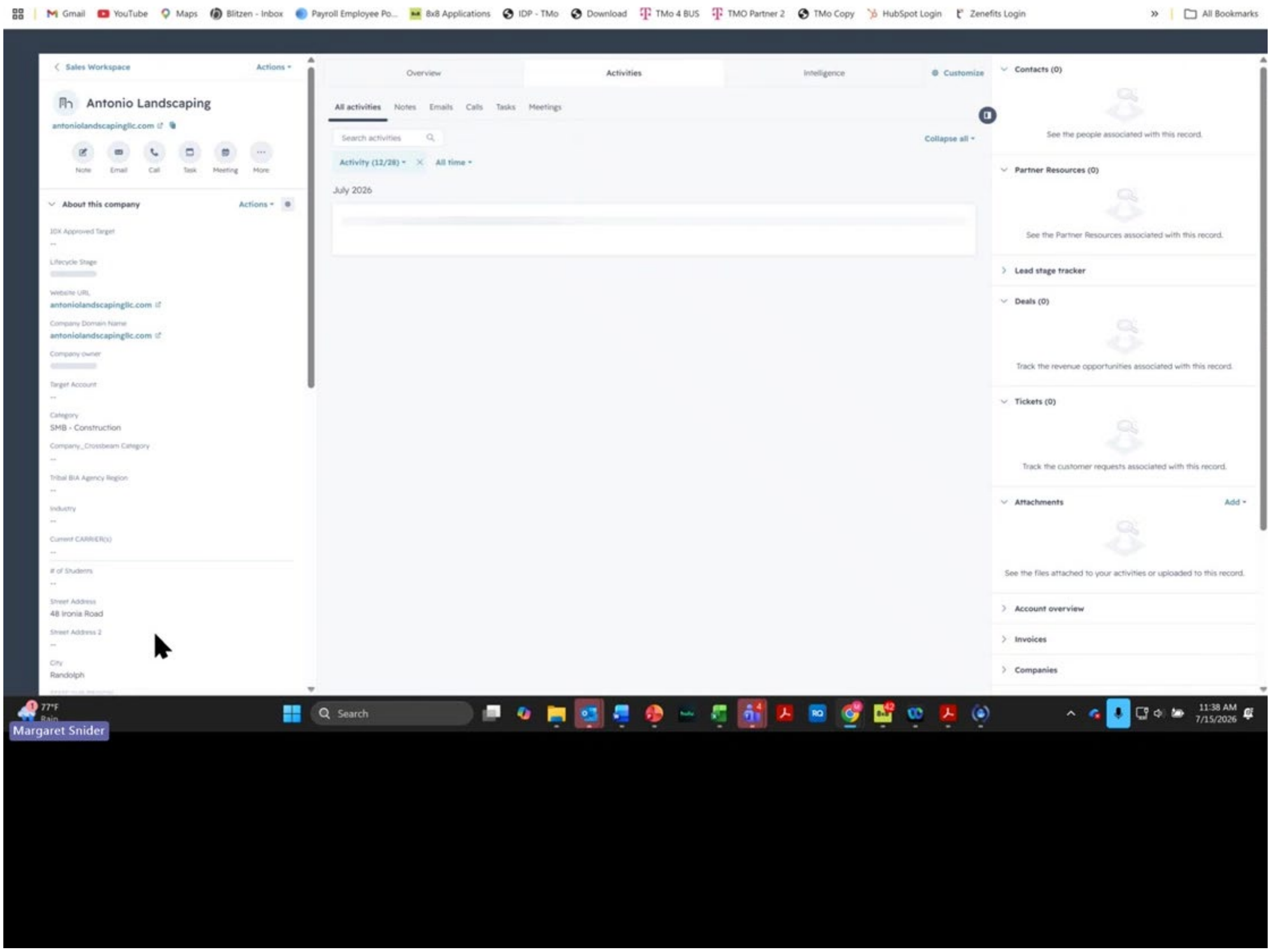
Review the information and click Create. Use Create and add another only when you are intentionally entering multiple unrelated company records. HubSpot opens the new company record after it is saved.



Part 2 — Add the Contact

STEP 8 Start from the new company record

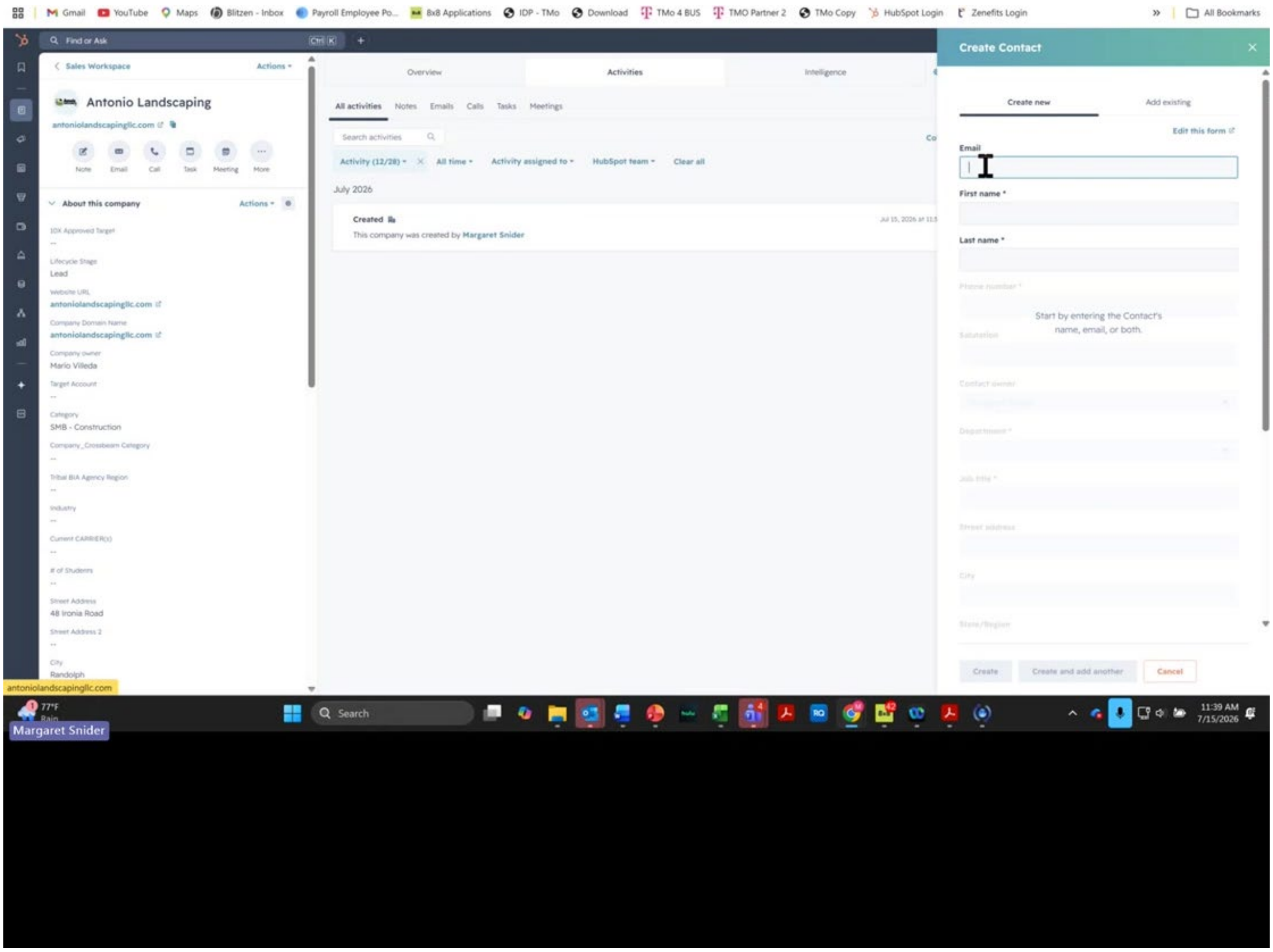
On the company record, locate the Contacts association card in the right-hand column. Select Add or Create contact. Starting from the company record helps ensure the new contact is associated with the correct company.



STEP 9 Enter the contact’s email address

Enter the contact’s business email address first. HubSpot uses email as a primary identifier, so watch for any duplicate-record warning before continuing.

If HubSpot finds an existing contact, stop and open the existing record rather than creating a duplicate.

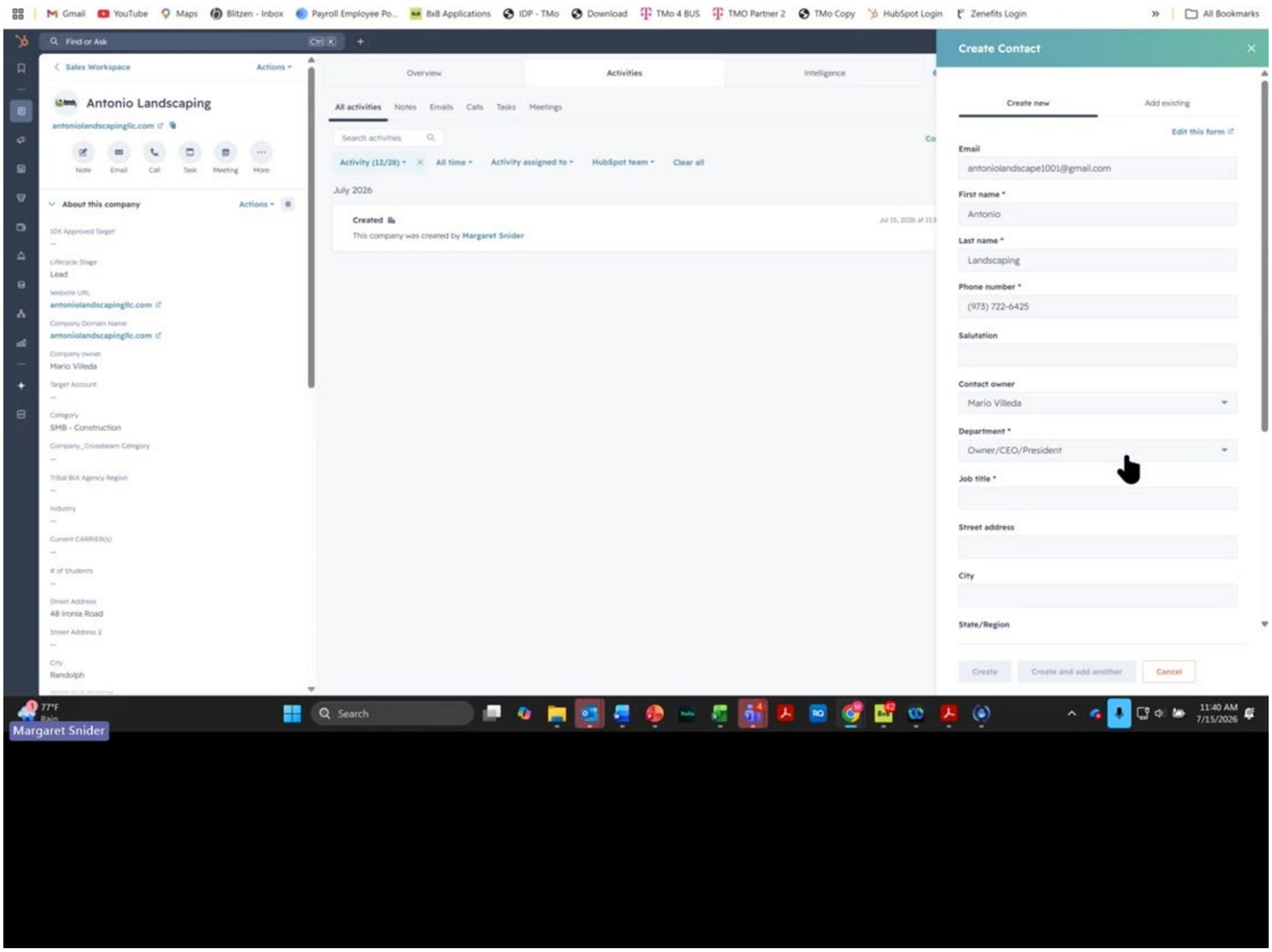


STEP 10 Enter the contact’s name and job information

Complete First name, Last name, Job title, and any role or contact-type properties used by Premier Wireless. Use the person’s formal business information rather than abbreviations or informal notes.

STEP 11 Enter phone and address details

Add the best direct phone number and extension when available. Complete mobile phone and address fields only when the information is known and appropriate. Use consistent formatting.

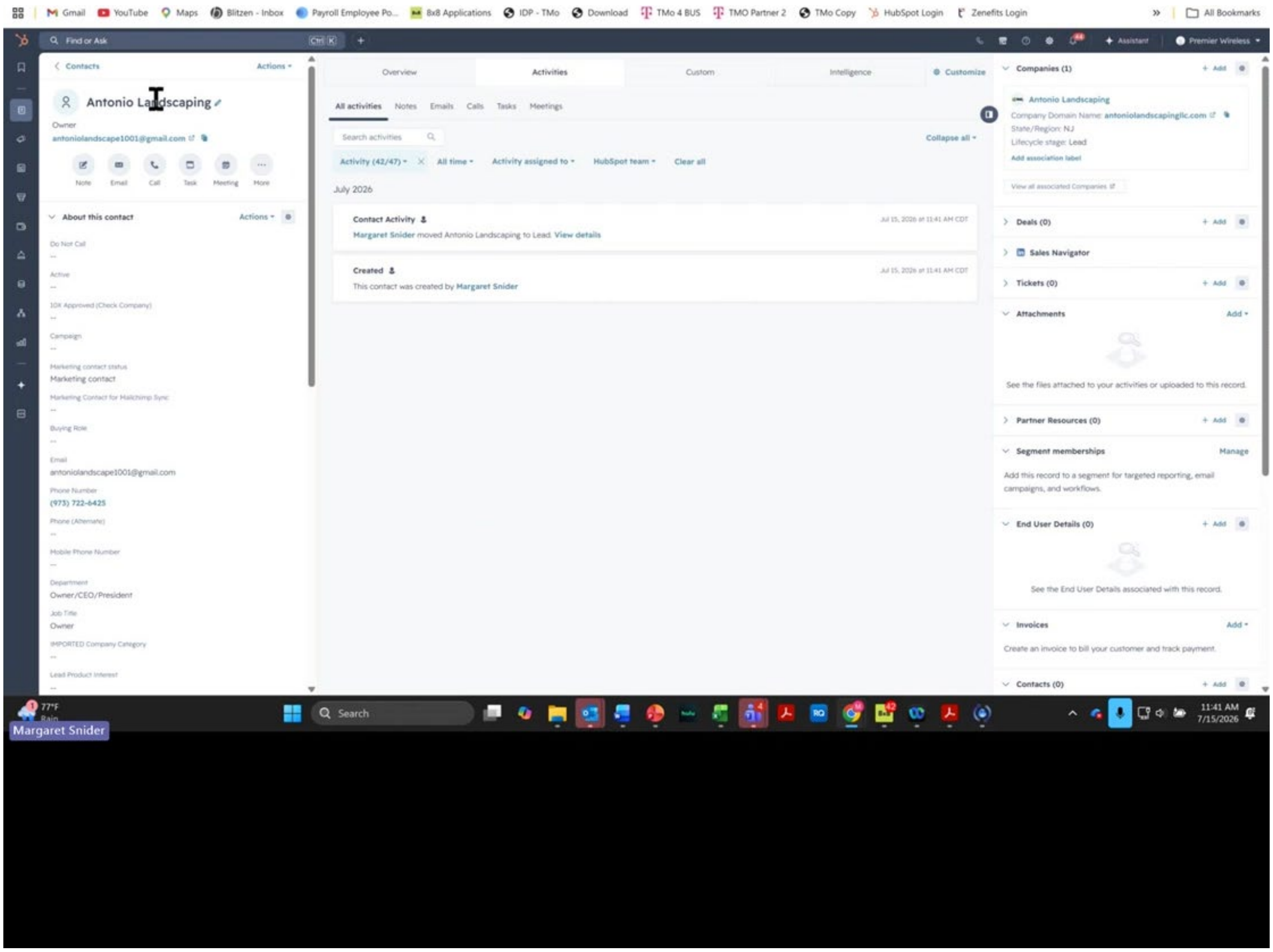


STEP 12 Confirm the company association and owner

Verify that the contact is associated with the company you just created. Select the appropriate Contact owner and complete any remaining required lead-source, status, or classification fields.

STEP 13 Create the contact

Review the form and click Create. HubSpot saves the contact and associates it with the company record.



STEP 14 Verify the completed records

Confirm that the contact appears in the company's Contacts card. Open the contact if needed and verify the company association, owner, email, phone number, and job title. Correct any missing or inaccurate information immediately.

Data Entry Checklist

Company Information	Contact Information	Final Quality Check
☐ Website/domain	☐ Business email	☐ Searched for duplicates
☐ Legal or recognized company name	☐ First and last name	☐ Domain and company name are correct
☐ Category / type / vertical	☐ Job title	☐ Required fields completed
☐ Street, city, state, ZIP	☐ Direct phone / extension	☐ Correct owner assigned
☐ Time zone	☐ Mobile phone, when available	☐ Contact associated with correct company
☐ Company owner	☐ Contact owner	☐ No personal notes placed in structured fields
☐ Current carrier or applicable properties	☐ Lead source / status / role fields	☐ Record saved successfully

Best Practice: HubSpot is the shared source of truth. Enter information completely and consistently so sales, operations, customer success, and reporting all rely on the same accurate record.