



BAYAN
ISLAMIC GRADUATE SCHOOL



Capturing New Contacts

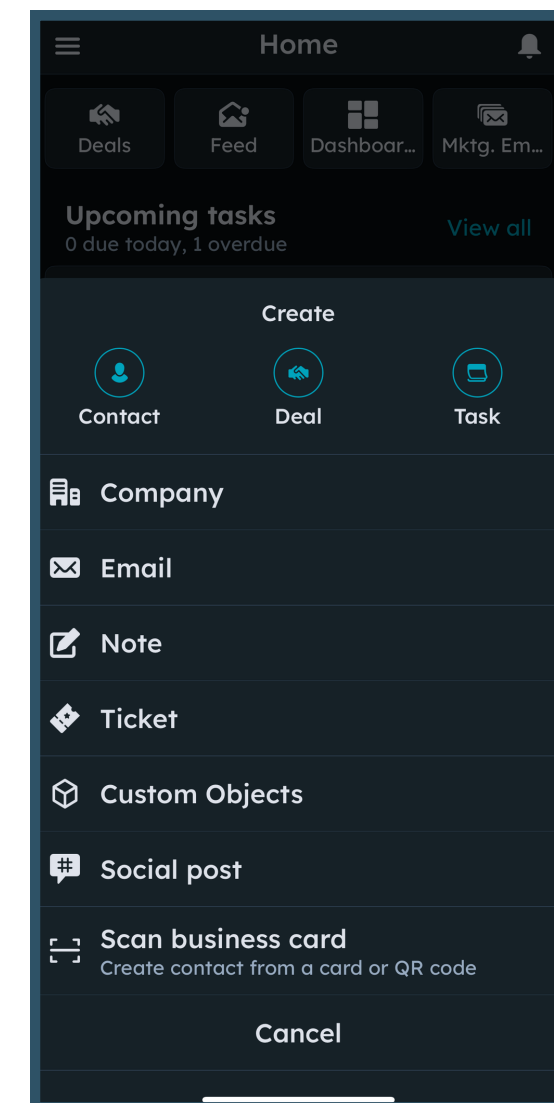
Capturing New Contacts

Name Drop (iPhone)

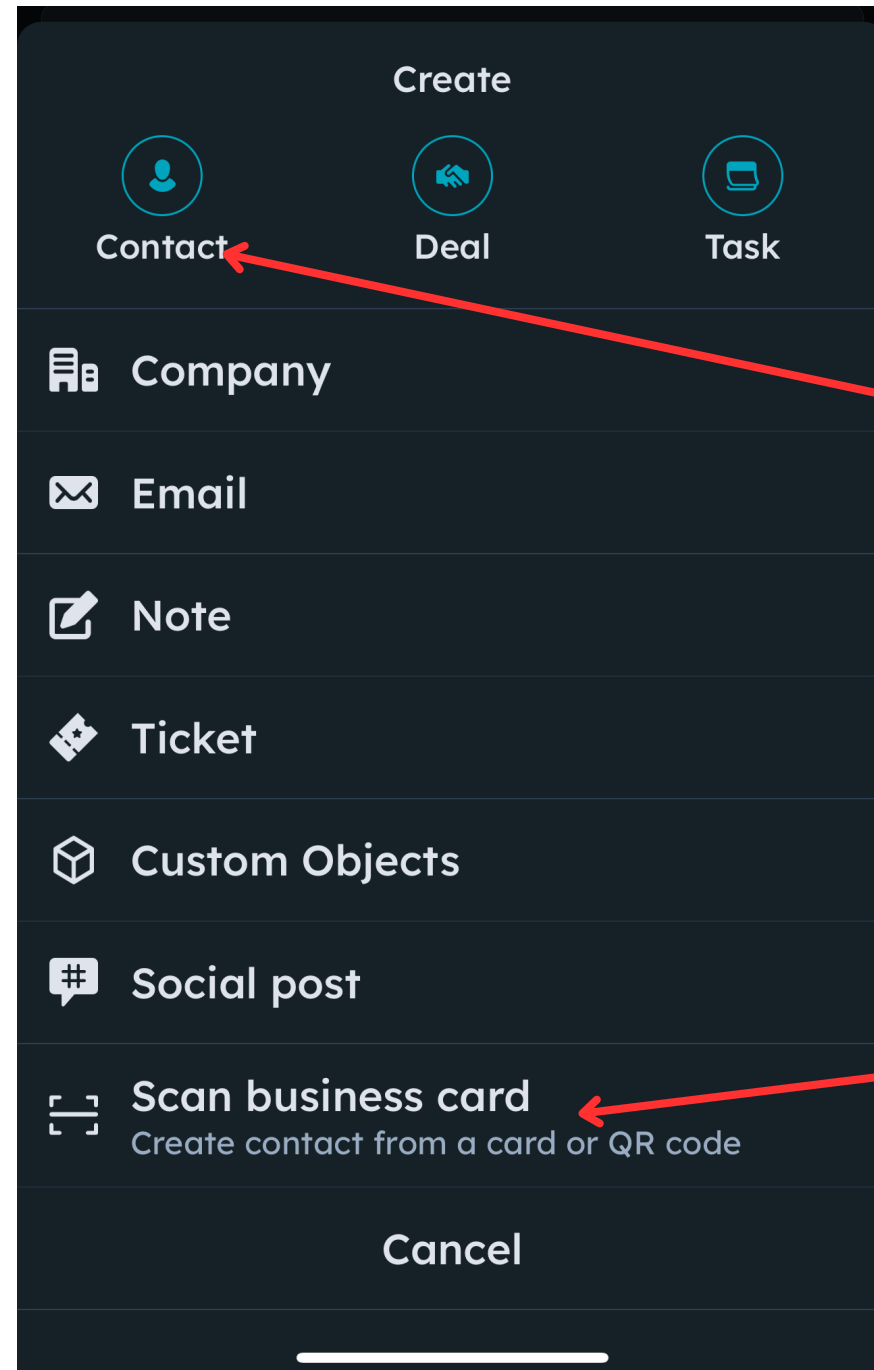
Make sure and have your phone contacts synced with HubSpot



Enter Into HubSpot Via Desktop or Mobile App



HubSpot



Contact



Deal



Task



Company



Email



Note



Ticket



Custom Objects



Social post



Scan business card
Create contact from a card or QR code

Cancel

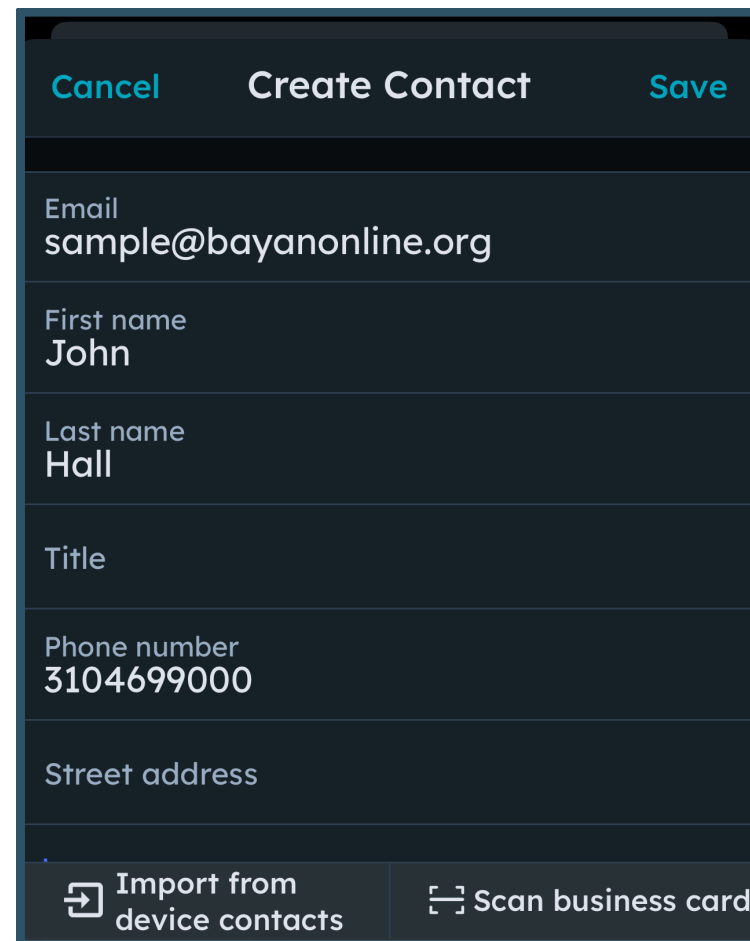
You can manually enter contact information.

You can scan a person's business code or QR code.



What to Enter

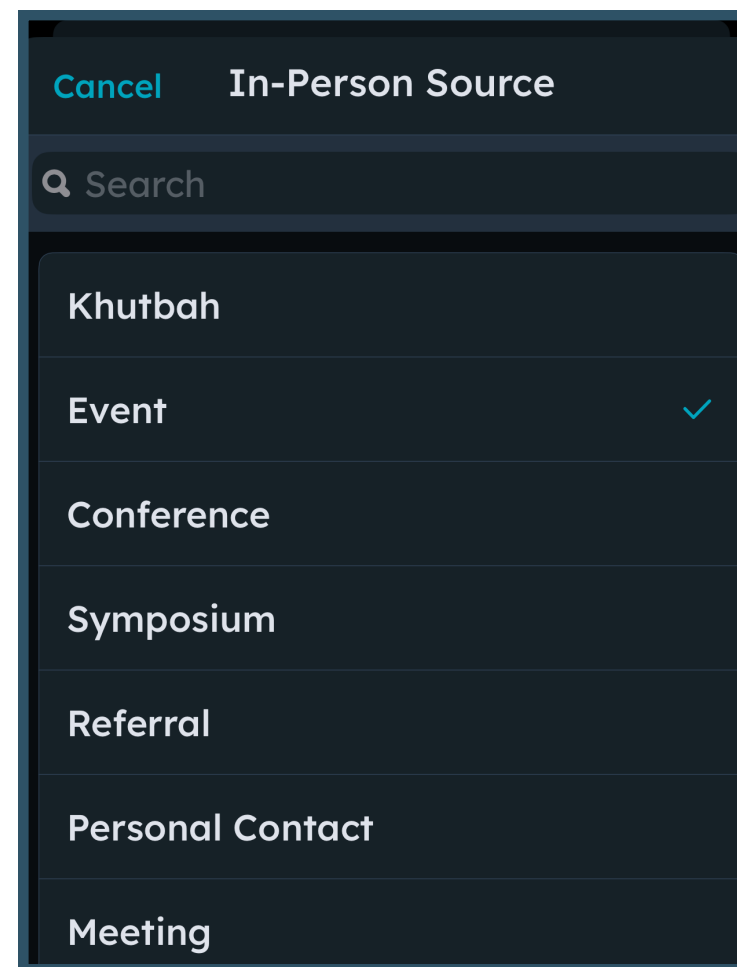
You only need to enter an email address and name but can also enter phone, address, and other details.



The 'Create Contact' form is displayed with a dark background. At the top, there are three buttons: 'Cancel' (red), 'Create Contact' (white), and 'Save' (green). Below the buttons are several input fields: 'Email' with the text 'sample@bayanonline.org', 'First name' with 'John', 'Last name' with 'Hall', 'Title' (empty), 'Phone number' with '3104699000', and 'Street address' (empty). At the bottom, there are two buttons: 'Import from device contacts' (with a contact icon) and 'Scan business card' (with a QR code icon).

NOT REQUIRED BUT IDEAL

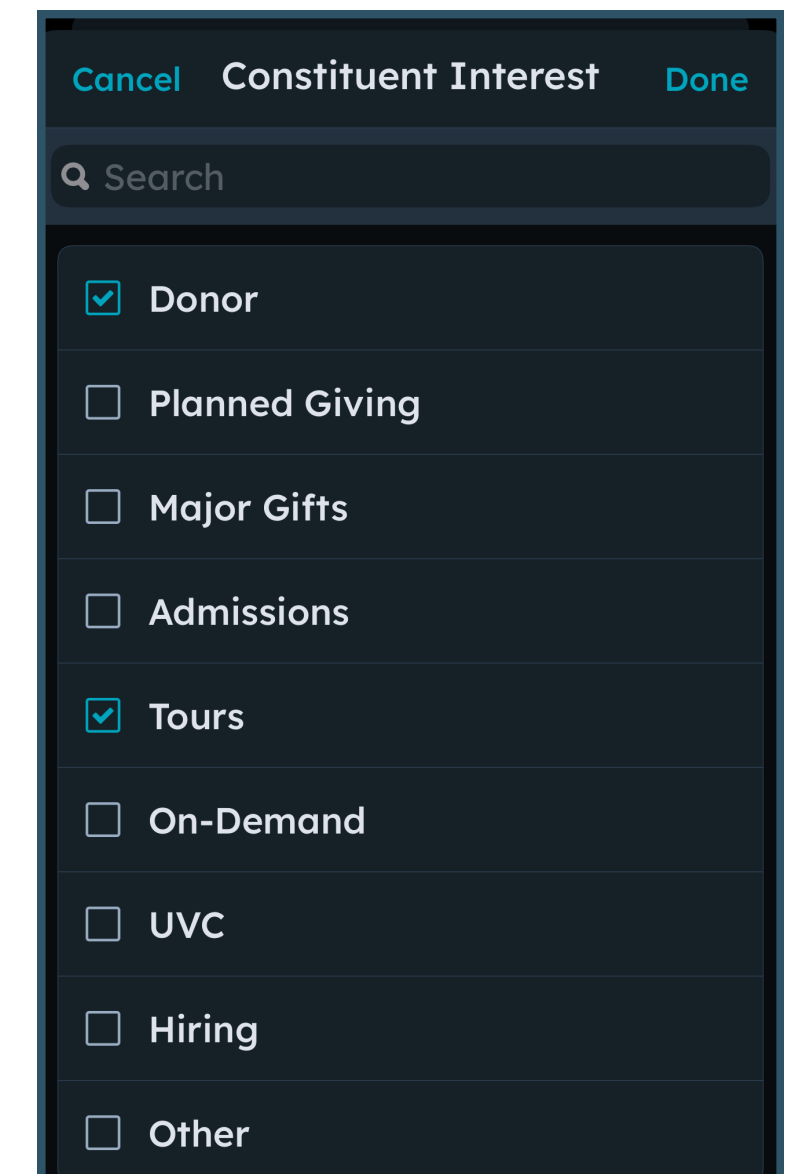
Try to indicate the source of the contact.
These are the manual contact choices.



The 'In-Person Source' screen has a dark background. At the top, there are two buttons: 'Cancel' (red) and 'In-Person Source' (white). Below the buttons is a search bar with a magnifying glass icon and the text 'Search'. Below the search bar is a list of options: 'Khutbah', 'Event' (with a green checkmark), 'Conference', 'Symposium', 'Referral', 'Personal Contact', and 'Meeting'.

NOT REQUIRED BUT IDEAL

Tag the potential interest. You can
check more than one area.



The 'Constituent Interest' screen has a dark background. At the top, there are three buttons: 'Cancel' (red), 'Constituent Interest' (white), and 'Done' (green). Below the buttons is a search bar with a magnifying glass icon and the text 'Search'. Below the search bar is a list of options with checkboxes: 'Donor' (checked), 'Planned Giving', 'Major Gifts', 'Admissions', 'Tours' (checked), 'On-Demand', 'UVC', 'Hiring', and 'Other'.



Other Helpful Things To Know

- 1) You can assign a contact to an owner other than yourself.
- 2) By tagging someone with an interest in a specific area, the individual will be followed up with. By way of example, if you tag a new contact with “Tours.” Bayan Tours will follow-up.
- 3) Unless you click Do Not Market, the new contact will be added to the Bayan marketing database.

