HubSpot CRM Naming Convention Guideline

Introduction

This document outlines the naming conventions to be used in the HubSpot CRM to ensure consistency, clarity, and ease of use. Adhering to these guidelines will help maintain organized records, streamline operations, and facilitate better data management.

General Principles

1. **Consistency:** Follow the naming format strictly to avoid confusion.
2. **Standard Abbreviations:** Use standardized abbreviations for common terms.
3. **Avoid Special Characters:** Stick to letters, numbers, dashes, and underscores.
4. **Capitalization:** Use Title Case for readability.
5. **Conciseness:** Include only essential information to keep names manageable in length.
6. **Use Trading Names:** Use the trading name of the company rather than the entity name.

Naming Conventions

1. Companies

Format: [Company] **or** [Company] - [Site]

Example: *Pilbara Ports* **or** *Glencore - Hail Creek*

Guidelines:

-   Use Title Case for company names and sites.
-   Separate the company and site with a hyphen.
-   Use the trading name of the company.

2. Parent Companies

Format: [Company] – Corporate – [Location]

Example: *BHP – Corporate - Australia*

Guidelines:

-   Clearly indicate parent companies by adding "Corporate" separated by a hyphen.
-   Location is used where companies have multiple corporate entities.
-   Capitalize the first letter of each major word.
-   Use the trading name of the company.

3. Contacts

Format: [First Name] [Last Name]

Example: *John Doe*

Guidelines:

- Do not include titles such as Mr., Mrs., Dr., etc.
- Use proper capitalization for first and last names.

4. Deals
Format: [Company] - [Site] - [Equipment Number/Type]
Example: *BMA - Caval Ridge - 3x MoistScans*
Guidelines:

- Provide a brief description of the equipment involved in the deal.
- Include the company name and site.

5. Tickets
Format: [Company] - [Site] - [Issue Type]
Example: *Buma - Meandu - Output Fault*
Guidelines:

- Briefly describe the issue type.
- Include the company name and site.