



ChiliDocs® Instruction



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1. Introduction

It is often not enough to provide the customer with a simple price list as a quotation. Do you create multi-page quotes in MS Word that contain important details about the products and services offered? Until now, this was not supported with HubSpot.

ChiliDocs® is the solution!

The smart tool retrieves the data from the company information, contacts and deals and easily links it to your Word document.

The procedure is exactly the same as if you were preparing a document for mail merge directly in MS Word: You equip the document with the necessary control characters and place it in the designated folder in the HubSpot file manager.

When you are on the desired deal in HubSpot, you will find the CRM card for ChiliDocs® in the right-hand column. Click on the "Create Quote" button to open a window, select the template and the Word document will be produced.

Now you can edit and save it as usual.

2. Prerequisites

You will need a **HubSpot portal with a Starter license** or higher. You also need MS Word version 2007 or higher.

3. Installation

ChiliDocs® is listed in the HubSpot Marketplace.

(<https://ecosystem.hubspot.com/marketplace/apps>). **Search for "ChiliDocs"**. The overview page explains how it works, the prices and the installation in detail.

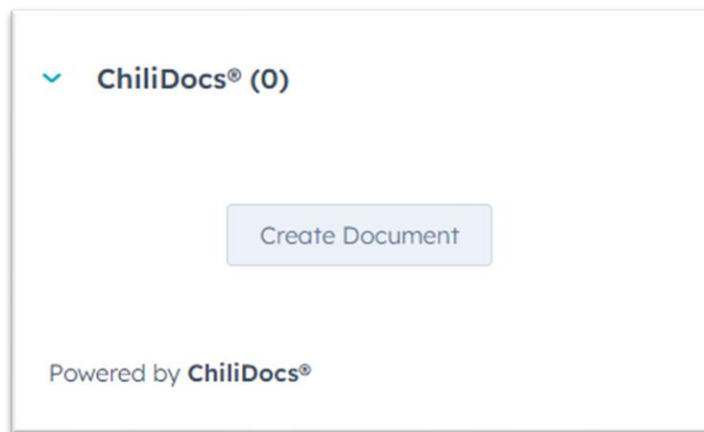
Select the following link and start the **14-day trial**:

- ChiliDocs® - 14 day trial, annual invoice:
https://app.hubspot.com/payments/Mc2qVXRydbVG6C2t?referrer=PAYMENT_LINK

Once you have entered your payment details (you will not yet be debited), the installation will start. Go through the authentication process step by step.

At the end of the process you will find the following:

1. A CRM card for ChiliDocs® has been created in the deals in the right-hand column.



- In the HubSpot FileManager you will find a new folder labeled "**ChiliDocs-Templates**". The folder contains a sample document in German and English.



4. Quick-Start

The next step is to prepare the Word document. The easiest way to do this is as follows:

Take a standard quote that you have created for a customer. Use a highlighter pen to mark all the words that you want HubSpot to fill in. Then replace the content with a control character. The most obvious ones are

Customer information

Company name	[company.name]
Address	[company.address]
Postalcode	[company.zip]
City	[company.city]
Country	[company.country]

Contact information

Lastname	[contact.lastname]
Firstname	[contact.firstname]
Salutation	[contact.salutation]

Deal informationen

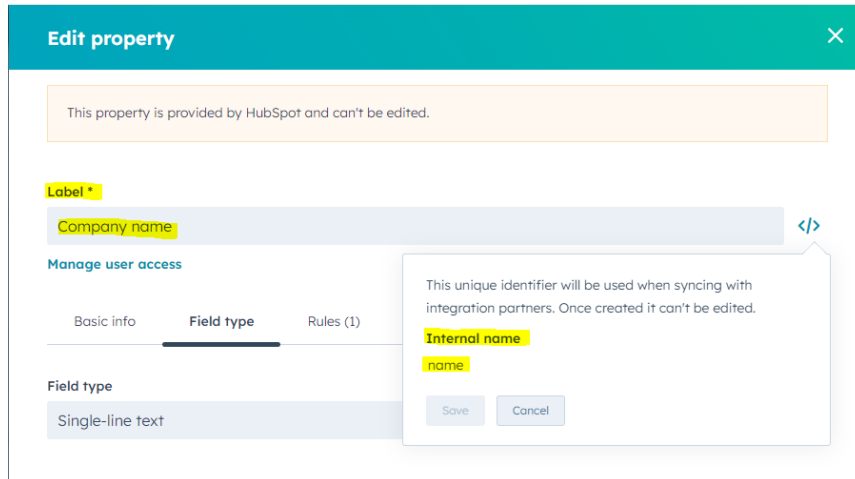
Dealname	[deal.dealname]
Amount	[deal.amount]

Note!

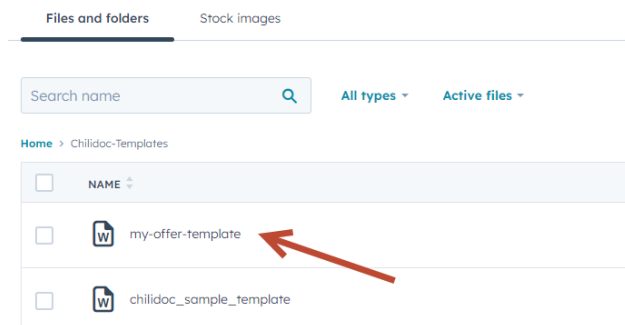
1. You can use any HubSpot standard object and any custom object associated with the deal
2. You can use any HubSpot standard and custom property of an object.
3. In general, the primary contact or the primary company is always listed.
4. You can also work with labels and display the information with the label.

Important!

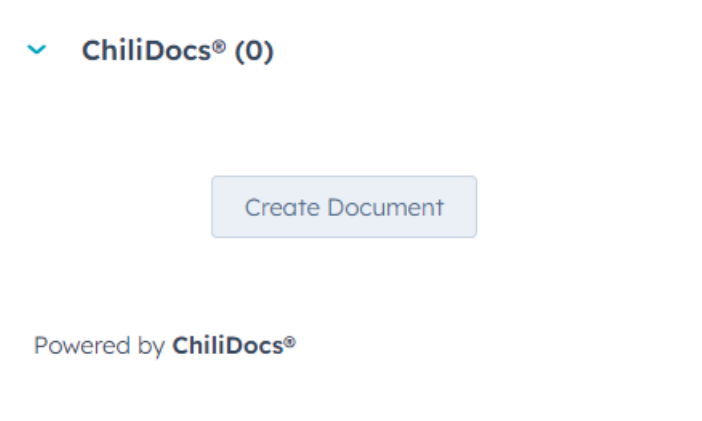
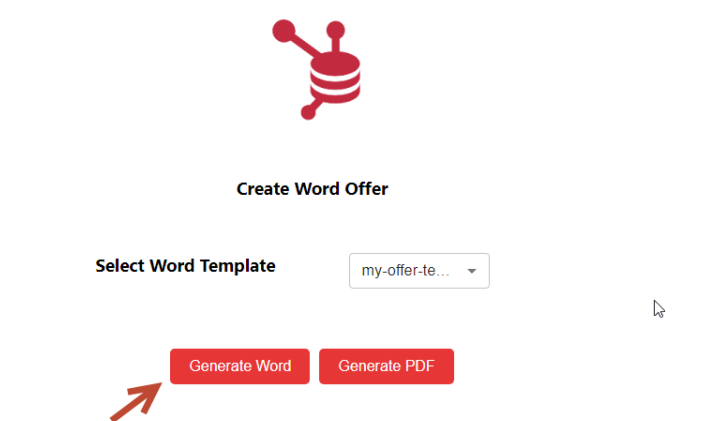
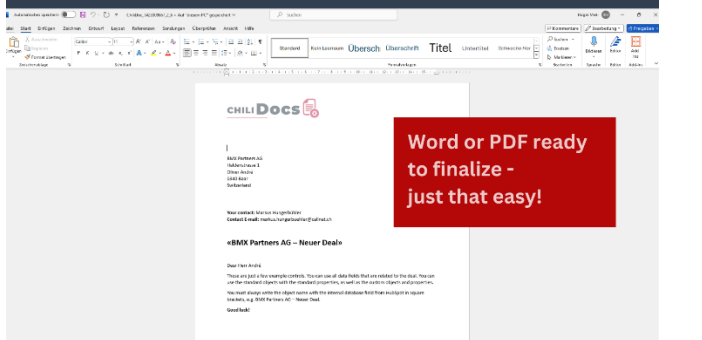
A control character is always enclosed in square brackets **[abc]** and is always preceded by the object name (contact, company, deal, ticket, etc.) and followed by the internal value of the property, e.g. company name (label) - name (internal value). The name can be found in the properties:



When the document is ready, you can save it as a Word document (.docx) and upload it to the HubSpot FileManager in the "ChiliDocs-Templates" folder.



You are now ready to use the offer template.

<p>1.</p>		<p>Go to the desired deal, click on "Create Document" in the ChiliDocs card.</p>
<p>2.</p>		<p>Select the desired template (you can also prepare several templates, e.g. different languages).</p>
<p>3.</p>		<p>After a few seconds, the Word document is ready and you can continue editing it and save it wherever you want.</p>

Congratulations!

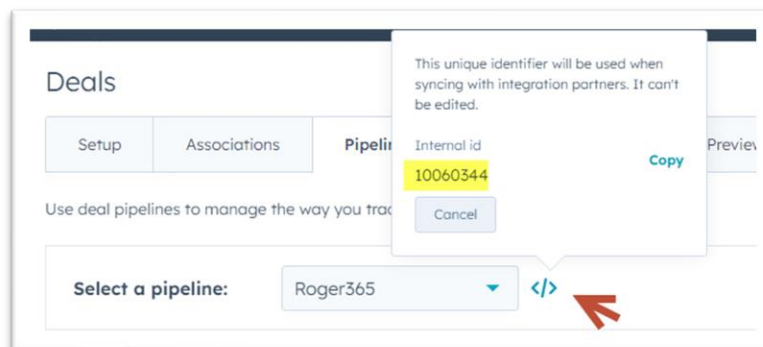
5. Advanced Features

5.1 Different templates for each deal pipeline

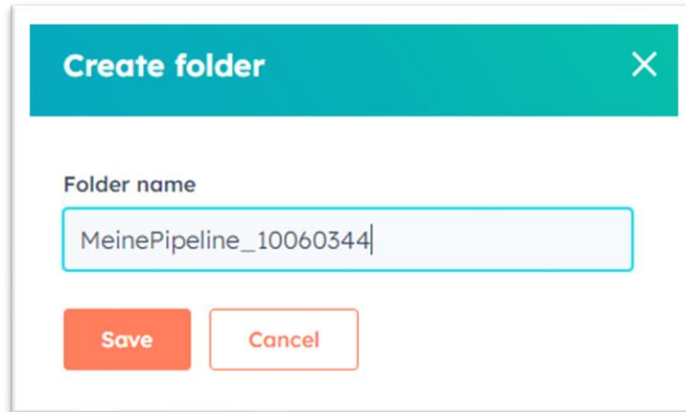
You can store the templates according to sales pipelines. These are then only displayed if the deal is assigned to the respective sales pipeline.

Proceed as follows:

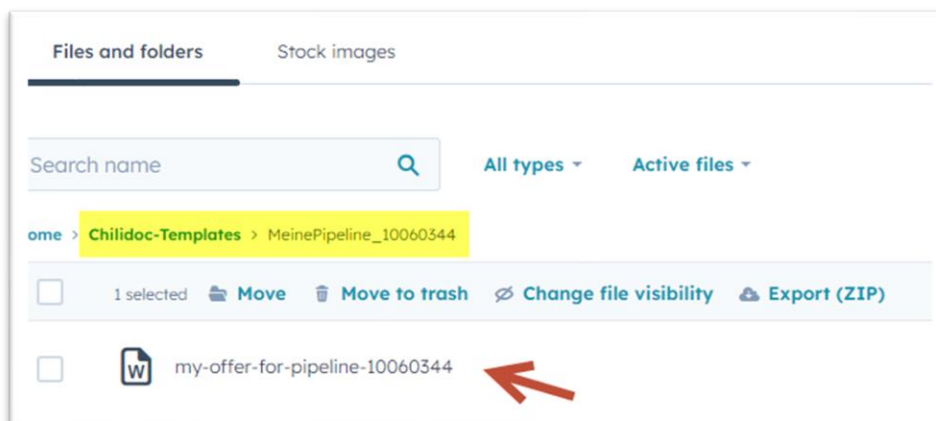
- Determine the Internal ID of the sales pipeline. This can be queried in Hubspot for each sales pipeline.



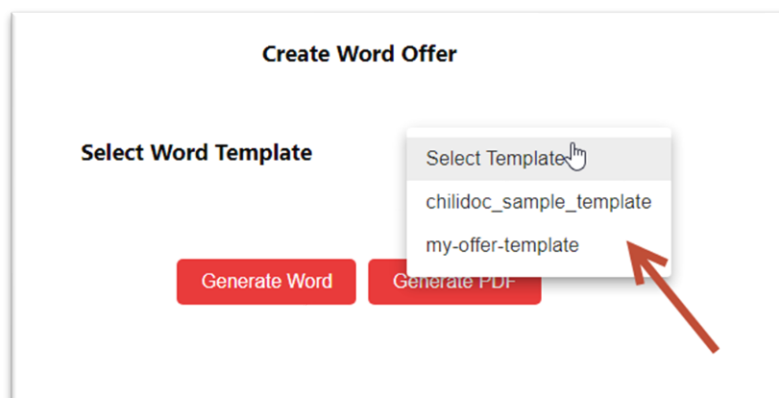
1. Name the file folder according to the pattern [Text]_[Internal ID]. You can freely choose the text. Then append the _ character and the ID, e.g:
MyPipeline_10060344



- Store the templates for the pipeline in this folder:



- The template is then displayed if the deal is assigned to this pipeline:



5.2 Multiple contacts and companies per deal

It is possible that a deal is assigned to several companies and contacts. These can be referenced via the label in the association.

Examples:

- [company(General company).name] shows the name of the company that you have marked with a "General company" label.
- contact(contractcontact).firstname] shows the first name of the contact that was referenced with the label "contractcontact" in the deal with a label.

Important!

The company or contact must be connected to the deal, i.e. it must be visible on the deal.

6. Troubleshooting

Nr.	Problem	Solution
1.	The data is not displayed in the Word document.	Check the control characters. Are they spelled correctly? Did you use the internal database value , not use the label?
2.	The company is not displayed.	Did you use the control character [company.name] ?
3.	ChiliDocs® has been installed, I see a CRM card, but cannot access the file manager.	You need at least a HubSpot Starter license , otherwise you will not have access to the file manager.

If you cannot solve the problem, please send the Word template to support@chili.ch we will be happy to help you.

7. FAQs (Frequently Asked Questions)

No.	Question	Answers
1.	Are the license costs per user or per HubSpot portal?	You can install a ChiliDocs® on your HubSpot portal and all users can use it.
2.	Can I only install ChiliDocs® on the deal? Can't I use another object, such as tickets or similar?	At the moment ChiliDocs® can only be installed on the deal. If you would like another object, please contact us, we are constantly working on further developing our products. support@chili.ch
3.	When I install ChiliDocs®, everything seems to have worked, but I can't access the file manager, why?	The free version of HubSpot does not provide access to the file manager. You need at least a Starter license.
4.	Which control characters must be used for the " Deal Owner "?	The following control characters can be used for the deal owner: deal.ownerfirstname deal.ownerlastname deal.owneremail

8. Appendix

You can find more information about ChiliDocs® or other products from ChiliDigital AG here:

Website: www.chili.ch/products

Terms & Conditions: <https://www.chili.ch/en/terms-conditions>

Privacy: <https://www.chili.ch/en/privacy-policy>

Data processing : <https://www.chili.ch/en/data-processing-agreement>

9. Legal and Licensing Information

ChiliDocs® is a registered trademark of ChiliDigital AG, Zurich - Switzerland.

This solution is provided "as is" without warranty of any kind, either express or implied.

In no event shall the authors or copyright holders be liable for any claim, damage or other liability, whether in contract, tort or otherwise, arising out of or related to the software or the use or other dealings with the software.

For more information, please consult the Terms, Privacy Policy and Data Processing Agreement listed above.

10. Feedback and Support

We look forward to your feedback, as it allows us to make the product even better and respond to your wishes.

A review in the HubSpot Marketplace also helps other interested parties to get a better picture.

You can also contact us at any time via support@chili.ch by e-mail.