

HubSpot CRM - Settings

To get to settings click the gear in the top right



Profile Settings:

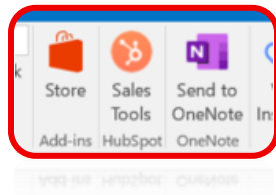
1. Please enter your first name and last name.
2. You can change the language in the language section
3. Date, time & number format settings
4. Defaults: You can change the default page to what shows up when you log in and click the logo in the top left of the tool.

Email Settings:

Make sure you close Outlook

1. Once in the Email tab, click **Connect personal email**.
2. Check the box **Turn on inbox automation**, and then click **Connect your inbox**.
3. Type your Polymershapes Email into the text box.
4. Click the orange button, **Connect to Outlook 365**
5. Next, it will ask you to read the fine print, click **Continue**.
 - a. If you are logged into Office 365, HubSpot will pull your credentials automatically. If not, it will ask you to verify your username and password.
6. Once completed, a message stating: **your email is now connected to HubSpot**. It will ask you if you would like to download the email extension, make sure you select **No, Thanks** here!

INCORRECT EXTENSION:



How to set up an Email Extension:

1. Scroll all the way to the bottom and select **Download the email extension**.
2. A drop-down will appear, select **Download HubSpot Sales add-in for Outlook (Windows/PC)**.

✓ Download the email extension



Install HubSpot Sales Extension for Gmail (Chrome)

The Chrome Extension works with Gmail to track email opens, log emails in your CRM automatically, and use templates in your inbox.



Download HubSpot Sales add-in for Office 365

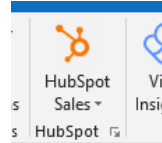
The Office 365 add-in works with Outlook to track email opens, log emails in your CRM automatically, and use templates in your inbox.



Download HubSpot Sales add-in for Outlook (Windows/PC)

The Outlook add-in works with Outlook to track email opens, log emails in your CRM, and use templates in your inbox. [System requirements](#)
[How to uninstall](#)

3. You will notice an .exe file downloading on your browser. Open this file to finish downloading.



Using the Never Log Section:

The purpose of this section is to put in full emails or just domains to ensure your emails with suppliers, personal, and logistics are not logged in the CRM.

★ Please note that if you put emails in this section, it is only for your emails, but if you want your whole team not to have those emails logged, please send to an Admin.

Phone Settings

1. Once in Calling tab, select **Add phone number**.
 - a. This is where you can enter the number you would like to dial out / outcall from.
2. Enter your phone number and select how you would like to receive a one-time verification code: SMS message or Phone call, then click **Text or Call me**.
 - a. Enter your verification code, and then click **Next**. Once completed, click **Done**.

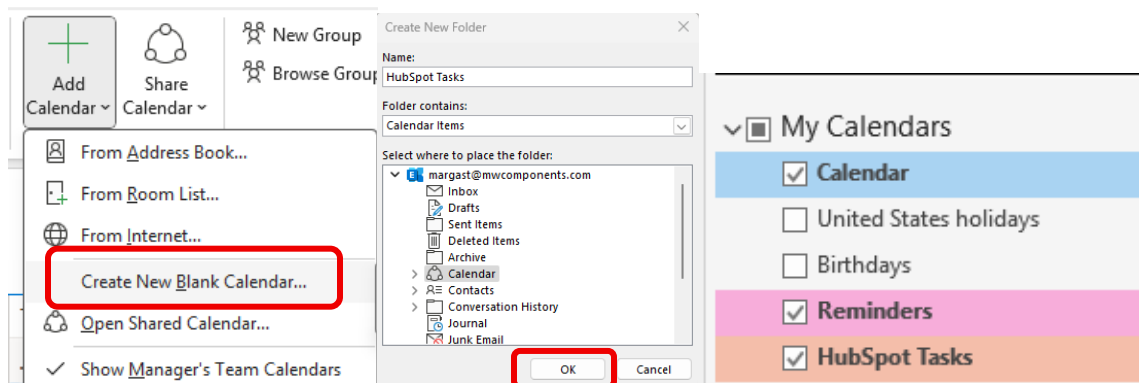
★ You can enter multiple phone numbers to outcall from.

Calendar Settings:

1. Once in Calendar tab, select orange button **Connect your Calendar**.
2. Choose the Microsoft Outlook calendar and then click **Accept and Connect**.
 - a. If you are logged into Office 365, HubSpot will pull your credentials automatically. If not, it will ask you to verify your username and password.
3. Next you are able sync your Hubspot tasks to your Outlook Calendar.
 - a. First add a new calendar to your Outlook by going to your calendar, click "Open Calendar" and choose "Create New Blank Calendar", name it and then click "OK".



Make sure to go to your calendars on the left and check the box to ensure your task calendar shows.



- b. Now go back into your Hubspot settings to choose your calendar you created to sync.

Account Settings

Manage your calendar accounts

- ☒ **Calendar Sync**
Calendar sync logs new meetings from your primary calendar to existing contacts in HubSpot.

Tasks Calendar Sync

Create and connect a new calendar to see HubSpot tasks on your calendar. [Learn more.](#)

- Hubspot Task Disconnect task calendar
- ☒ **g Pages**
Hubspot Task

Availability Calendars

- c. Lastly, you are able to change the domain on your meeting URL if you choose to do so.

Meetings

Customize your HubSpot Meetings URL and domain.

Meetings URL

Your new meetings URL will only apply to future meetings and won't affect links created before.

meetings.hubspot.com/ miriam-argast

Task Settings:

You can change the defaults on your task settings in this section.

Defaults

Set preferences for task creation.

Due date	Due time
In 3 business days ▼	🕒 8:00 AM ▼
Reminder	
No reminder ▼	

Follow-up tasks

Set preferences for follow-up reminders.

- ☒ Get prompted to create a follow up task every time you complete a task from a list view

How to adjust notification settings:

1. To adjust your notification settings, go to **Settings**.
2. On the left-hand side under **Your Preferences**, select **Notifications**.
3. Once in your Notifications settings, you will see the tabs **Email**, **Desktop**, **Other apps**, and **Mobile app**.
4. Select any of these tabs to adjust different notifications.
5. Each of the tabs contains two parts: **How you get notified** and **What you get notified about**.
6. To adjust **What you get notified about**, scroll to the bottom and select the drop-down you would like to adjust.
7. You can then check and un-check boxes depending on what actions you want to notify you and how those notifications come through.



Your notifications are completely customizable.