

Sola Salon Studios - HubSpot Default Settings

In HubSpot, a few key default settings can make all the difference in how smoothly you navigate the system. Set them up right, and you'll spend less time clicking around—and more time doing what really matters: connecting with Pros. This guide will walk you through:

- Making Deals your Default Home Screen
- Bookmarking Deals, Tasks, and Contacts in the Nav Bar
- Viewing Deals through the Kanban View

13 Steps [View most recent version](#) 

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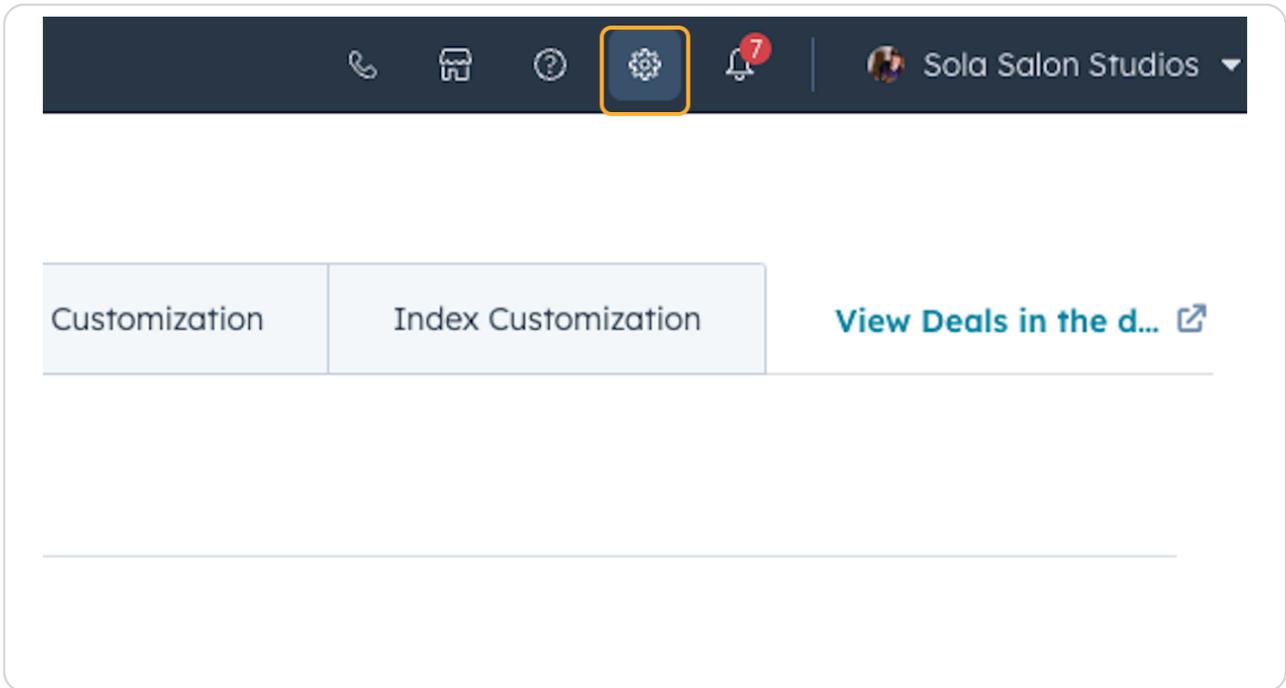
Mar 12, 2025

Making Deals your Default Home Screen

4 Steps

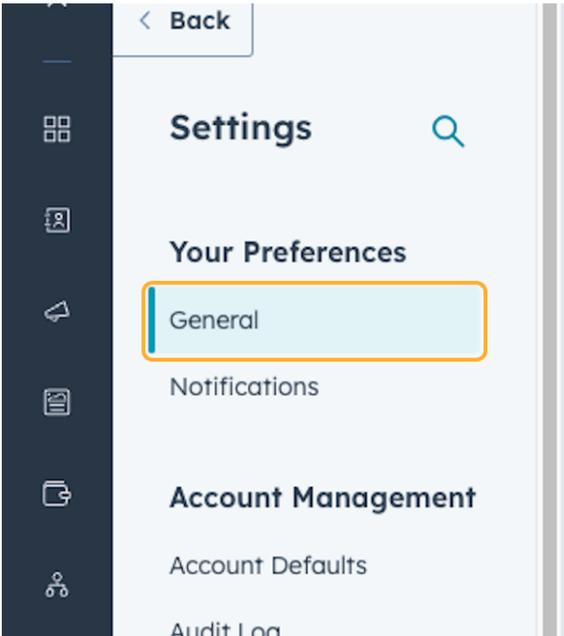
STEP 1

Click on Settings



STEP 2

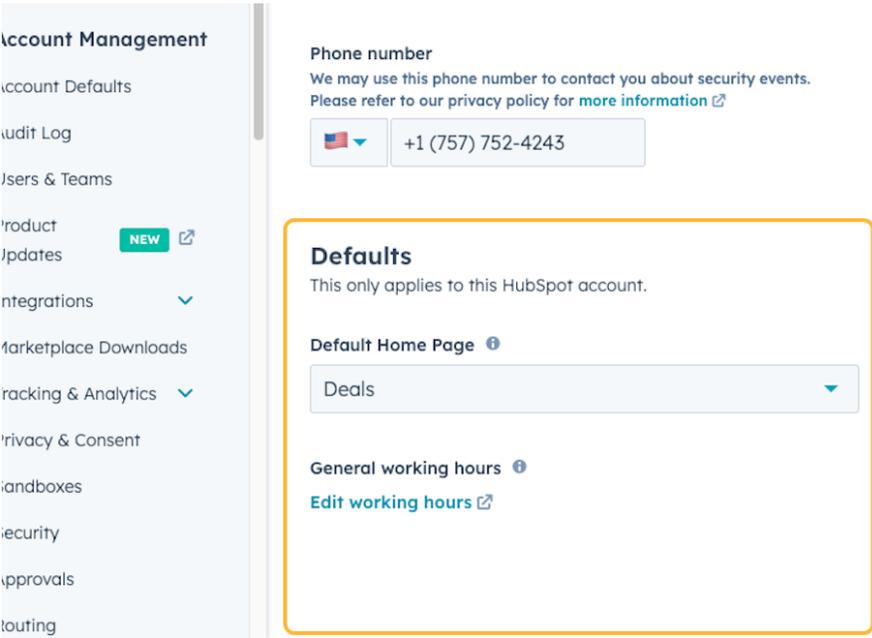
Click on General



The screenshot shows the HubSpot Settings interface. On the left, a dark sidebar contains navigation icons. The main content area is titled 'Settings' and has a search icon. Under the heading 'Your Preferences', the 'General' option is highlighted with an orange border. Other options listed are 'Notifications', 'Account Management', 'Account Defaults', and 'Audit Log'. On the right, the 'General' settings page is shown, with tabs for 'Profile', 'Email', and 'Calling'. Below the tabs, it states 'These preferences only apply to you.' and 'Global' settings that apply across all HubSpot accounts. A 'Profile Image' section shows a circular profile picture of a woman.

STEP 3

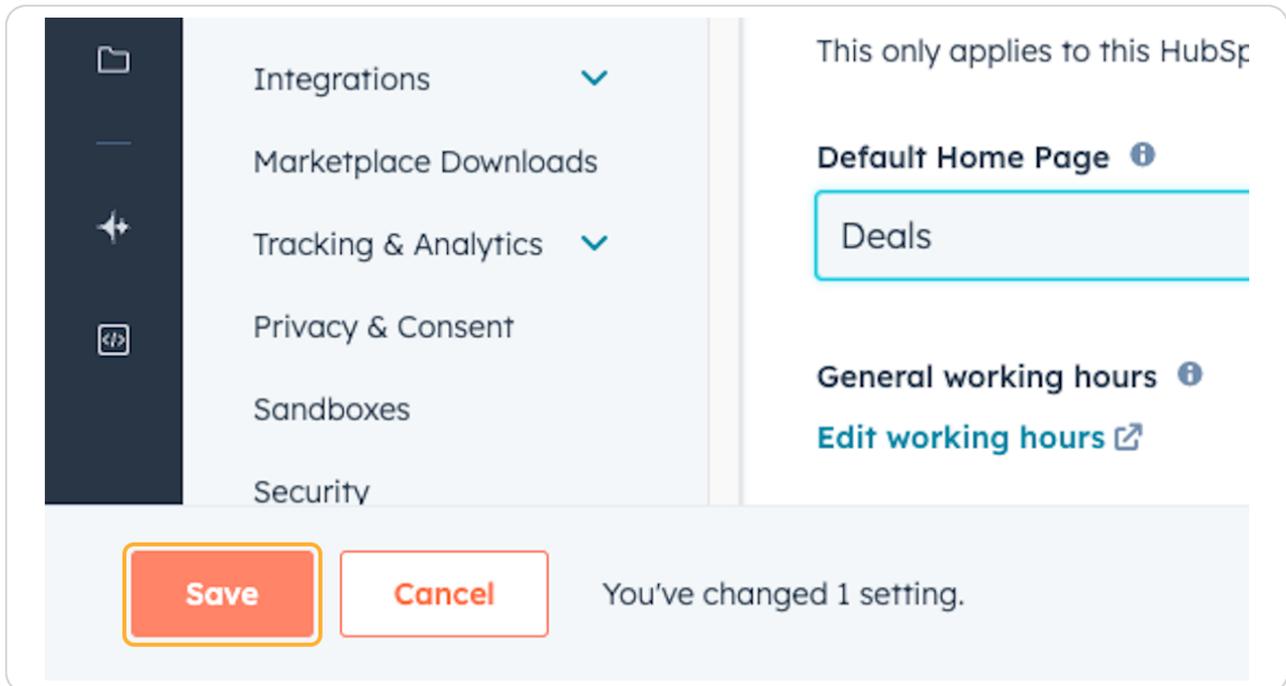
Scroll until you see Defaults. Click on Default Home Page, Select Deals



The screenshot shows the 'Account Management' settings page. The left sidebar lists various management options, including 'Account Defaults', 'Audit Log', 'Users & Teams', 'Product Updates' (with a 'NEW' badge), 'Integrations', 'Marketplace Downloads', 'Tracking & Analytics', 'Privacy & Consent', 'Sandboxes', 'Security', 'Approvals', and 'Routing'. The main content area shows 'Phone number' settings with a dropdown for country and a text input for the number '+1 (757) 752-4243'. Below this, the 'Defaults' section is highlighted with an orange border. It includes a note 'This only applies to this HubSpot account.' and a 'Default Home Page' dropdown menu currently set to 'Deals'. There is also a 'General working hours' section with an 'Edit working hours' link.

STEP 4

Click on Save



The screenshot shows the HubSpot settings interface. On the left is a dark sidebar with icons for folder, plus, and document. The main menu lists: Integrations (with a dropdown arrow), Marketplace Downloads, Tracking & Analytics (with a dropdown arrow), Privacy & Consent, Sandboxes, and Security. The right panel shows settings for 'This only applies to this HubSp...'. The 'Default Home Page' is set to 'Deals' (with an info icon). Below it, 'General working hours' is shown with an 'Edit working hours' link (with an external link icon). At the bottom, there are two buttons: 'Save' (highlighted with an orange border) and 'Cancel'. To the right of the buttons, it says 'You've changed 1 setting.'

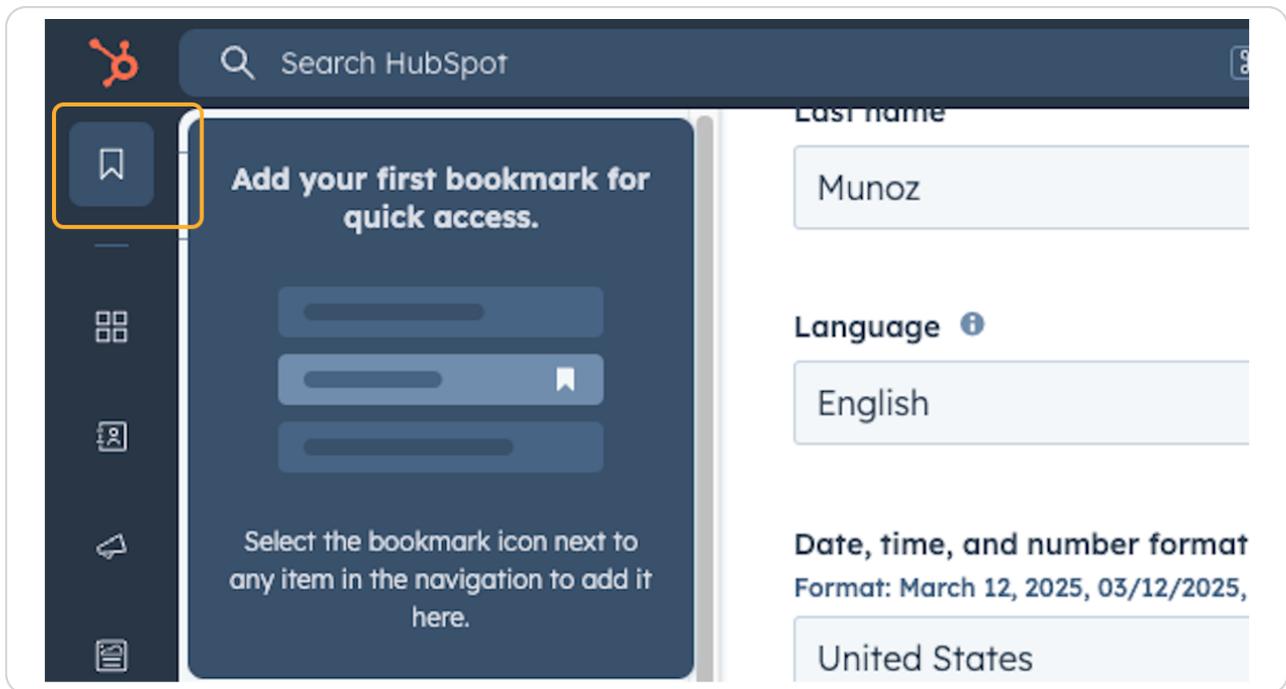
Bookmarking Deals, Tasks, and Contacts in the...

5 Steps

STEP 5

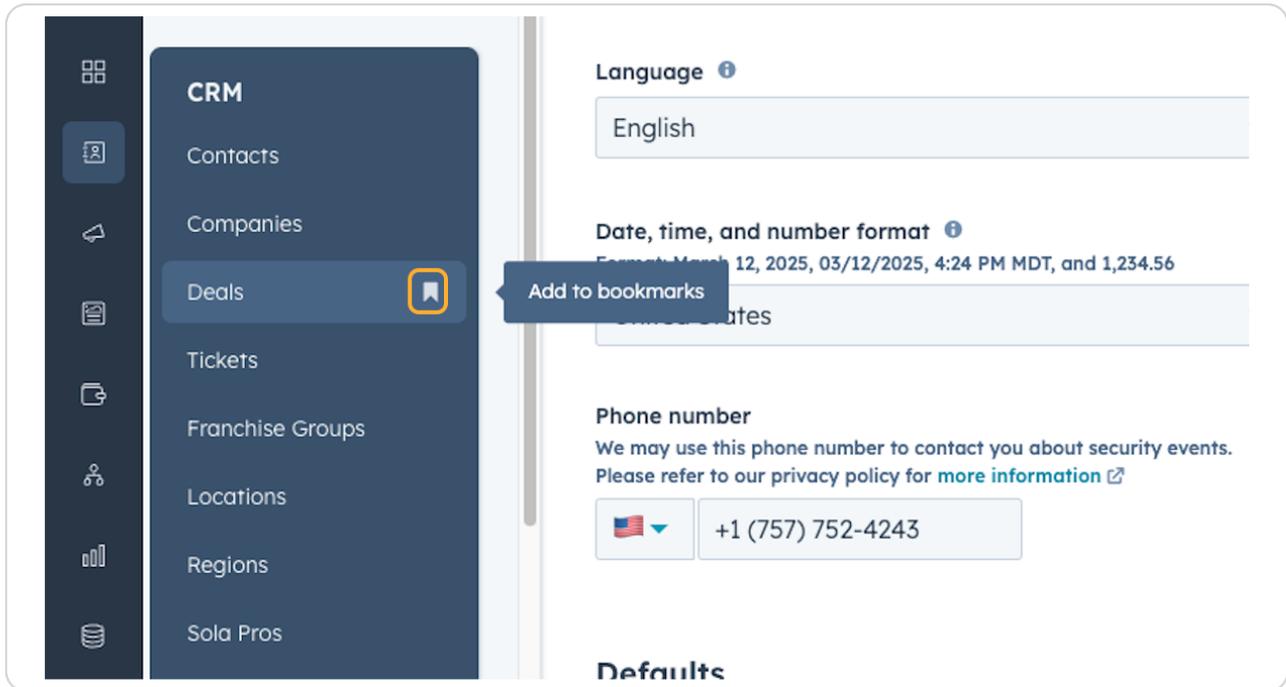
Click on the Bookmark

This is where you'll go to see all of your bookmarked items. Bookmarking an item in HubSpot allows you to more quickly navigate to the section of HubSpot you want to be in.



STEP 6

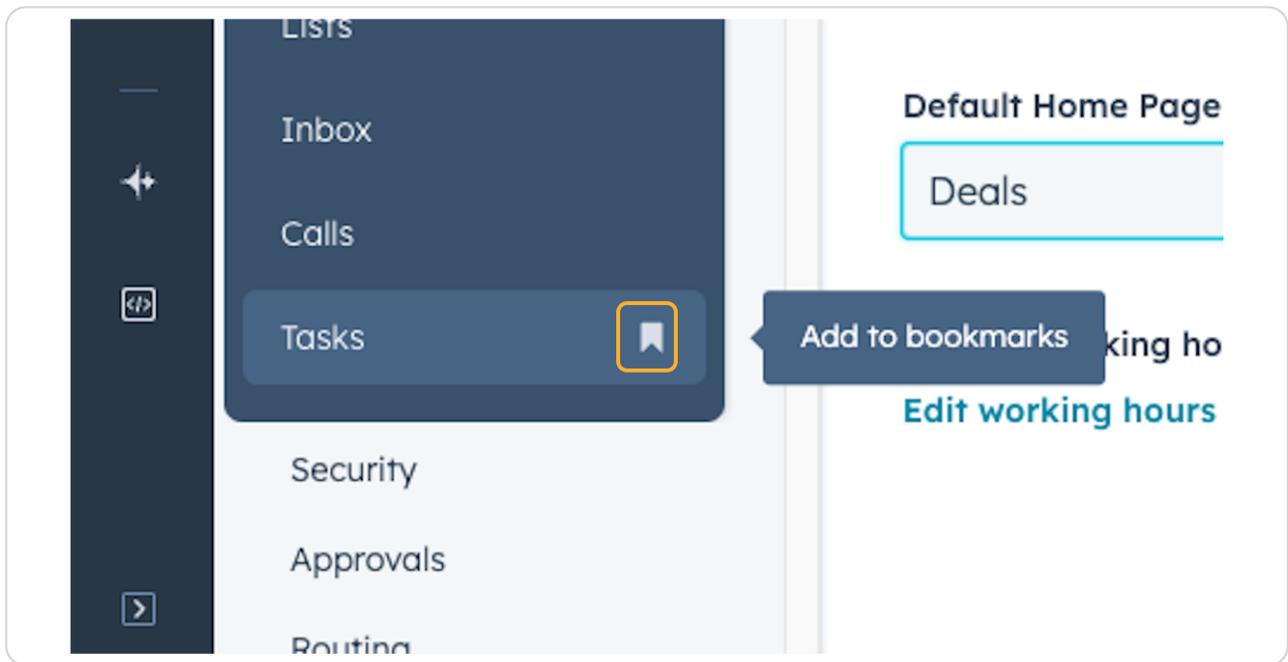
Go to the CRM section of the navigation, find Deals and Click to Add to bookmarks



The screenshot shows a CRM application interface. On the left is a dark blue navigation sidebar with icons for various sections. The 'CRM' section is expanded, showing a list of items: Contacts, Companies, Deals, Tickets, Franchise Groups, Locations, Regions, and Sola Pros. The 'Deals' item is highlighted with a blue background and a yellow bookmark icon. A tooltip with the text 'Add to bookmarks' is positioned over the bookmark icon. The main content area on the right displays settings for 'Language' (English), 'Date, time, and number format' (Format: Month 12, 2025, 03/12/2025, 4:24 PM MDT, and 1,234.56), and 'Phone number' (+1 (757) 752-4243). The 'Defaults' section is partially visible at the bottom.

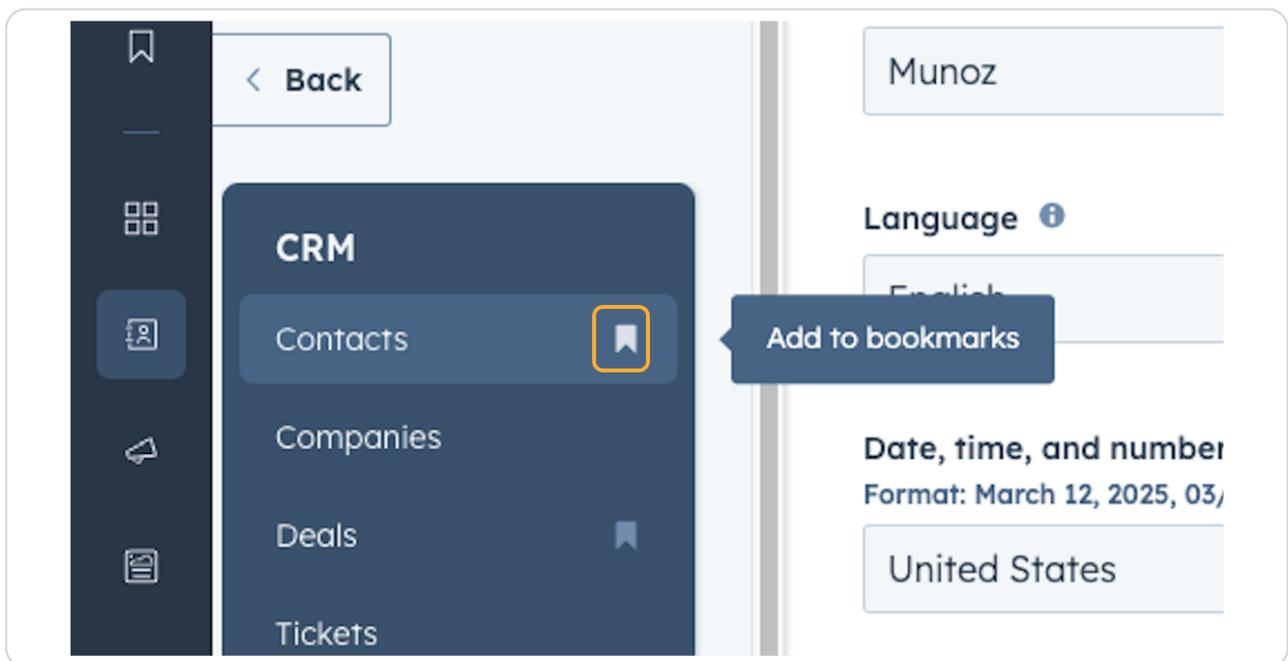
STEP 7

In that same section, move down to Tasks and Add to bookmarks



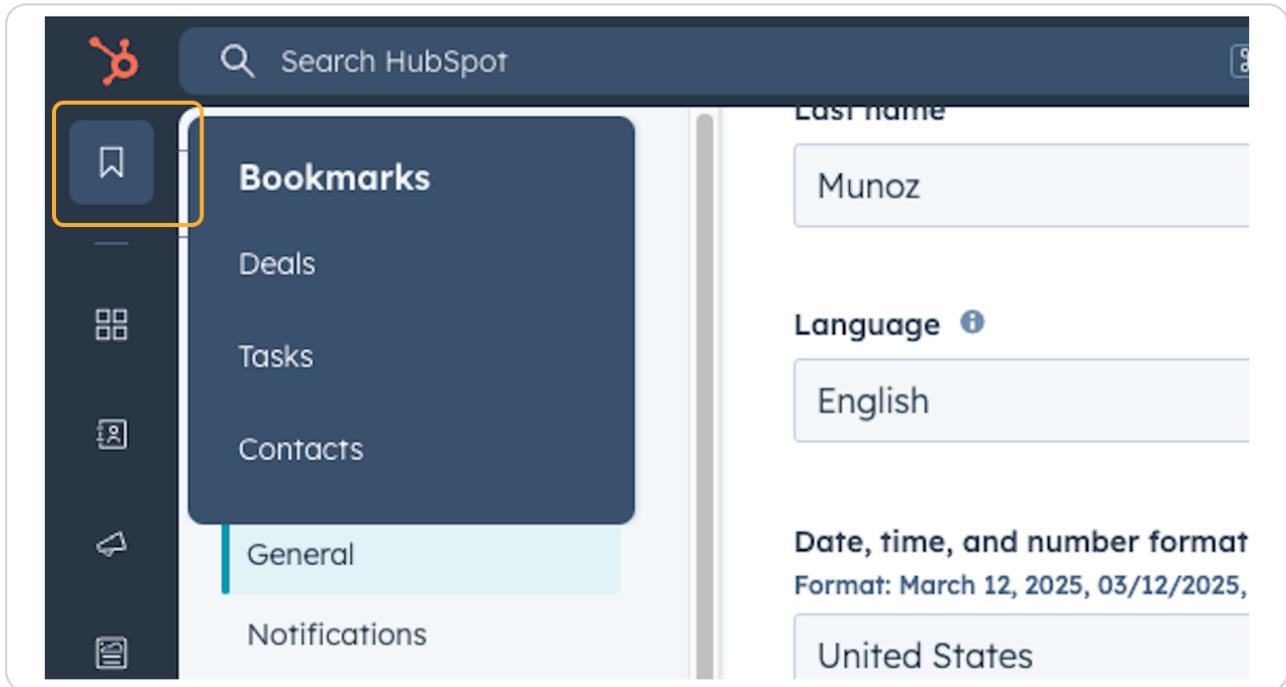
STEP 8

In the same section at the top, Add Contacts to bookmarks



STEP 9

Now when you go back to the Bookmarks tab on the nav bar, you'll see all of the bookmarked items



Viewing Deals Through the Kanban View

4 Steps

When you first enter HubSpot and navigate to Deals, you'll be shown all your Deals in a list view. You'll want to make sure you toggle over to the Kanban view.

STEP 10

Click on Deals

The screenshot shows the HubSpot CRM interface. On the left, a dark sidebar contains navigation icons. The main content area shows a 'CRM' menu with options: Contacts, Companies, Deals (highlighted with a yellow box), Tickets, Franchise Groups, Locations, and Regions. On the right, a settings panel is open, showing 'Language' set to 'English', 'Date, time, and number format' set to 'United States', and a 'Phone number' field with the value '+1 (757) 752-4243'.

STEP 11

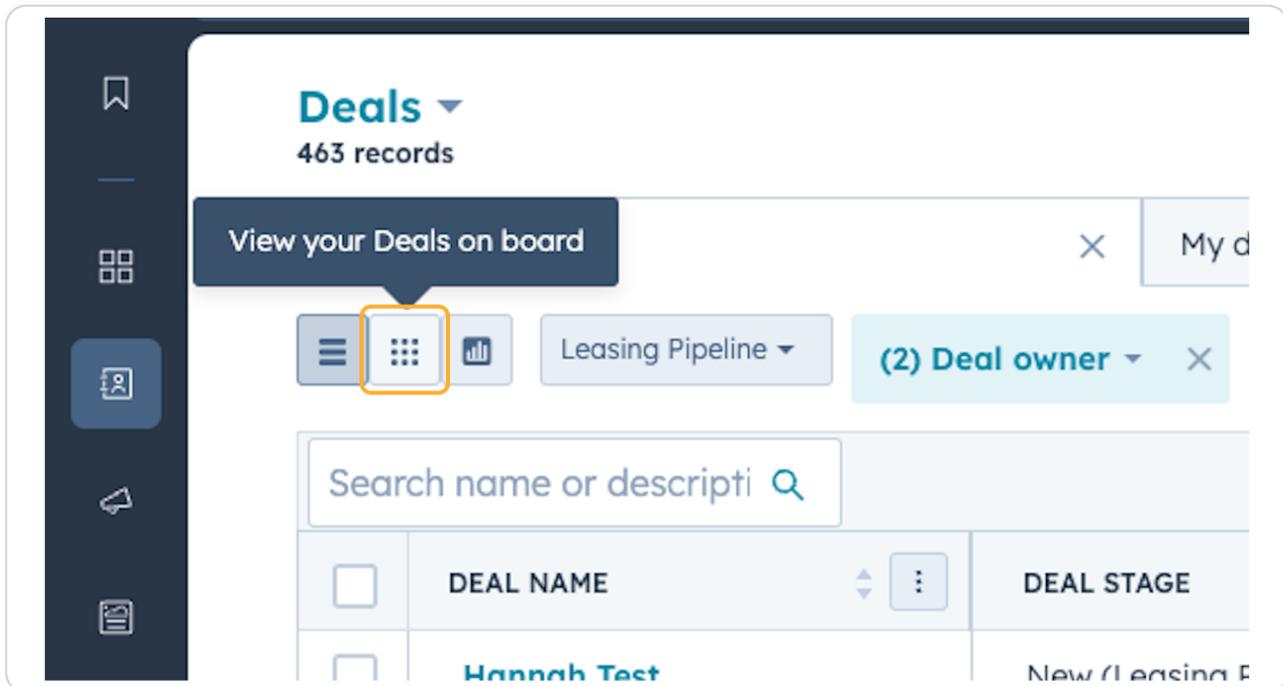
The first time in HubSpot you may see Deals in a List view

The screenshot shows the HubSpot Deals list view. The table has the following columns: DEAL NAME, DEAL STAGE, CLOSE DATE (HST), DEAL OWNER, AMOUNT, and FOLLOW-UP. The data rows are as follows:

DEAL NAME	DEAL STAGE	CLOSE DATE (HST)	DEAL OWNER	AMOUNT	FOLLOW-UP
Hannah Test	New (Leasing Pipeline)	--	Hannah Munoz (hanna...)	--	--
John Moore (re-engaged)	Tour Scheduled (Leasing Pip...	--	Tricia Cremeans (trish...)	--	--
Hannah Test (re-engaged)	Tour Scheduled (Leasing Pip...	--	Hannah Munoz (hanna...)	--	--
Hannah Test	Closed/Nurture (Leasing Pip...	Today at 6:42 AM HST	Hannah Munoz (hanna...)	--	Mar 24
Laura Smith (re-engaged)	Connected (Leasing Pipeline)	--	Tricia Cremeans (trish...)	--	--
Laura Lift	Connecting (Leasing Pipeline)	--	Tricia Cremeans (trish...)	--	--
Ash Lift	Tour Scheduled (Leasing Pip...	--	Tricia Cremeans (trish...)	--	--
CRM Demo: Dave Moore	Tour Scheduled (Leasing Pip...	Apr 23, 2025 7:16 AM HST	Tricia Cremeans (trish...)	--	--
Demo Locations: John Moo...	Closed/Nurture (Leasing Pip...	Today at 8:45 AM HST	Tricia Cremeans (trish...)	--	Apr 2,
Demo Locations: Laura Sm...	Closed/Nurture (Leasing Pip...	Yesterday at 11:34 AM HST	Tricia Cremeans (trish...)	--	Mar 14
CRM Demo: Anna Jackson	Closed/Nurture (Leasing Pip...	Jan 10, 2025 12:04 PM HST	Tricia Cremeans (trish...)	--	--
Demo Locations: John Doe	Tour Completed (Leasing Pip...	--	Tricia Cremeans (trish...)	--	--

STEP 12

Click on View your Deals on board



STEP 13

Now you'll see your Deals in the Kanban view

