


Sola Salon Studios - Setting Up Your Account in HubSpot (Gmail)

In this guide we'll walk through setting up your HubSpot account. We'll walk you through:

- Accepting the Join HubSpot invitation
- Setting up your profile in settings
- Connecting your calendar

20 Steps [View most recent version](#) 

Created by

Doug Davidoff

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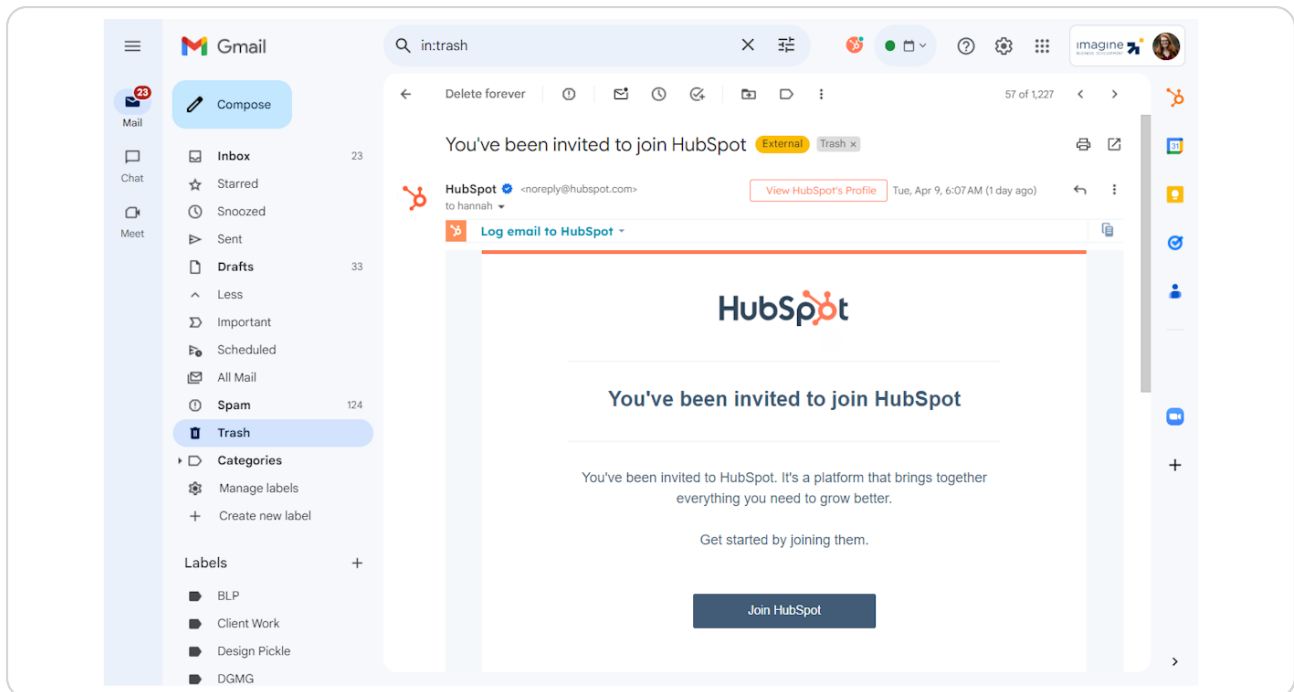
Accept Your Invite to Join HubSpot

1 Step

STEP 1

Email Invitation

You'll receive an invitation to join your team in HubSpot. Click "Join the team" and follow the prompts to setup your login information.



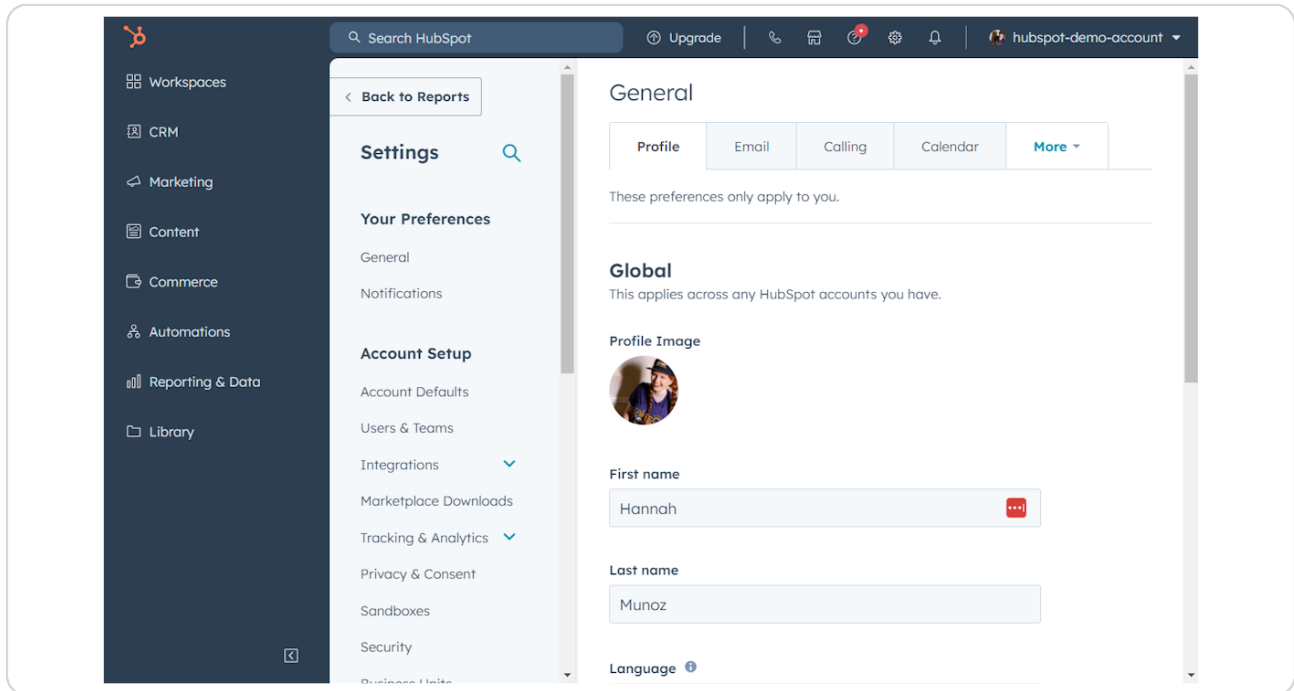
Login to HubSpot to Setup Your Account

9 Steps

STEP 2

Setup Your Account

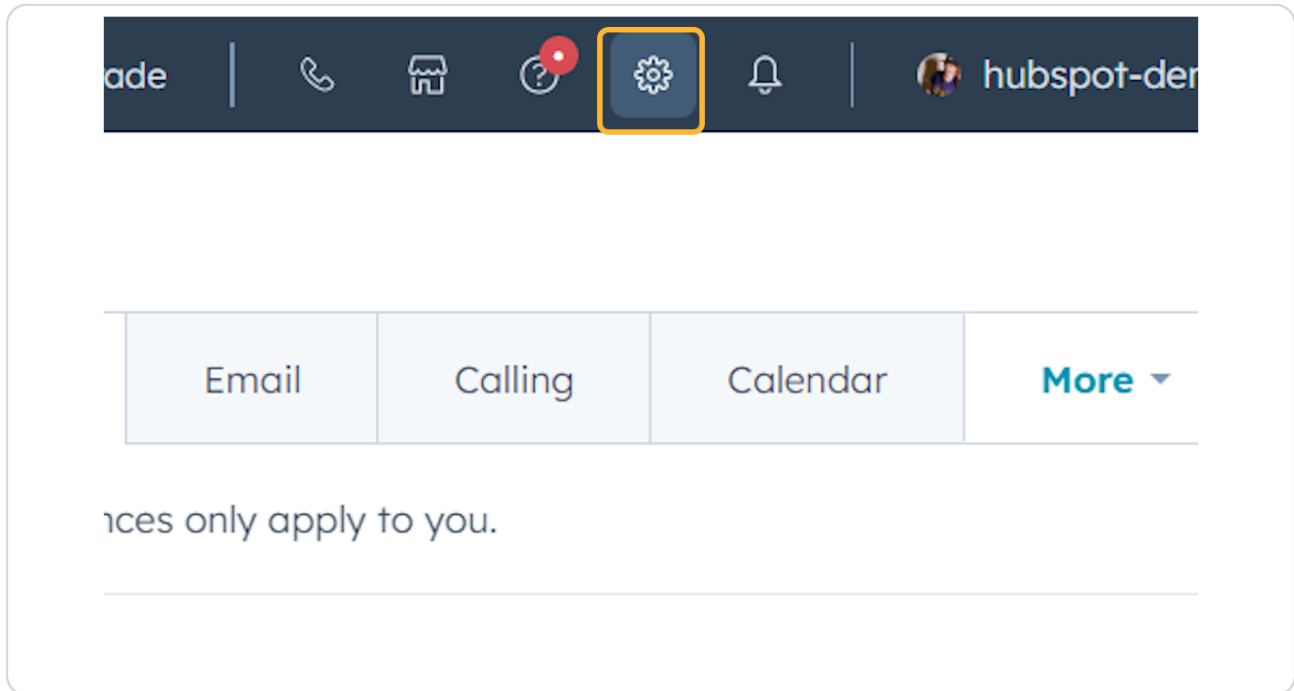
Once you have setup your login information, you'll need to configure your account defaults.



STEP 3

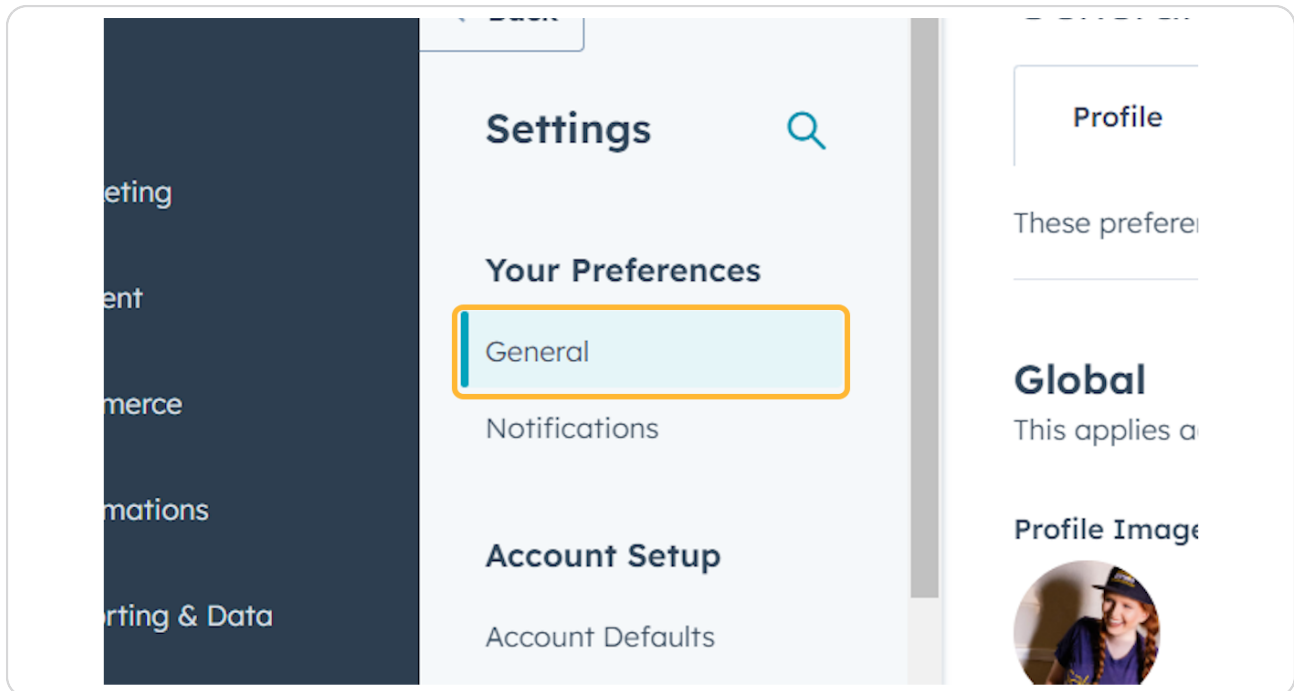
Click on Settings

In the top right corner, click on the gear icon.



STEP 4

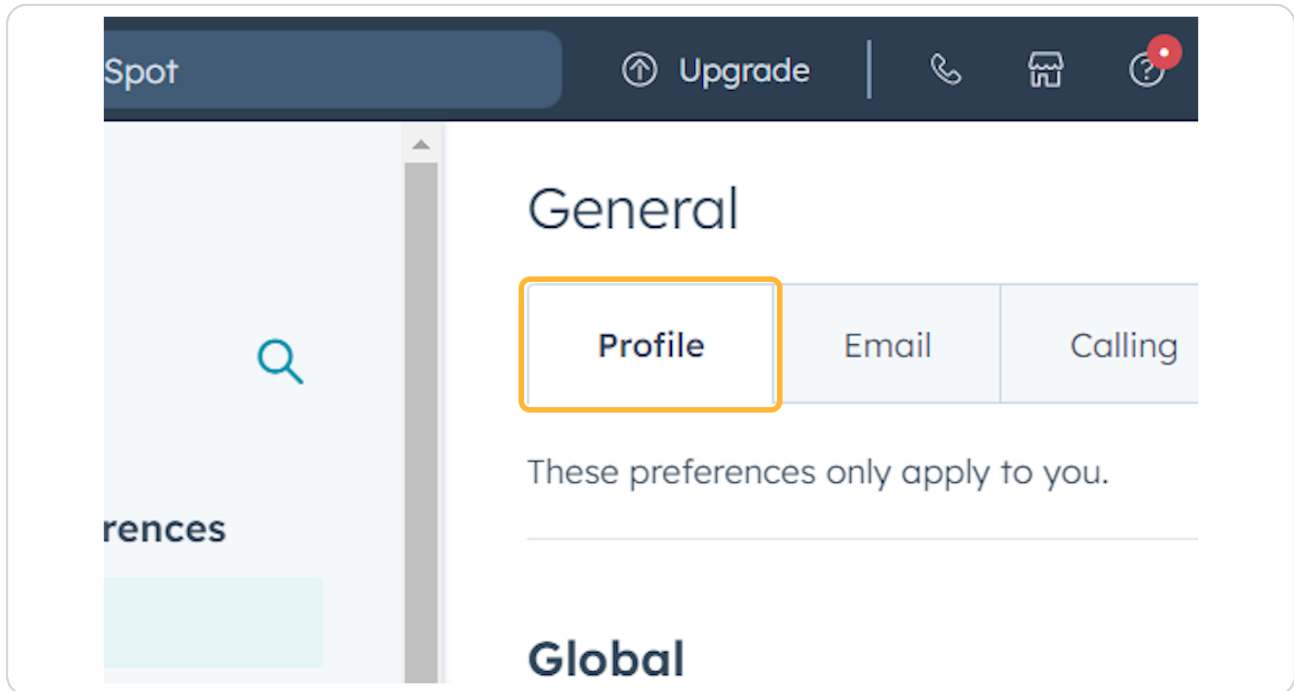
Click on General



STEP 5

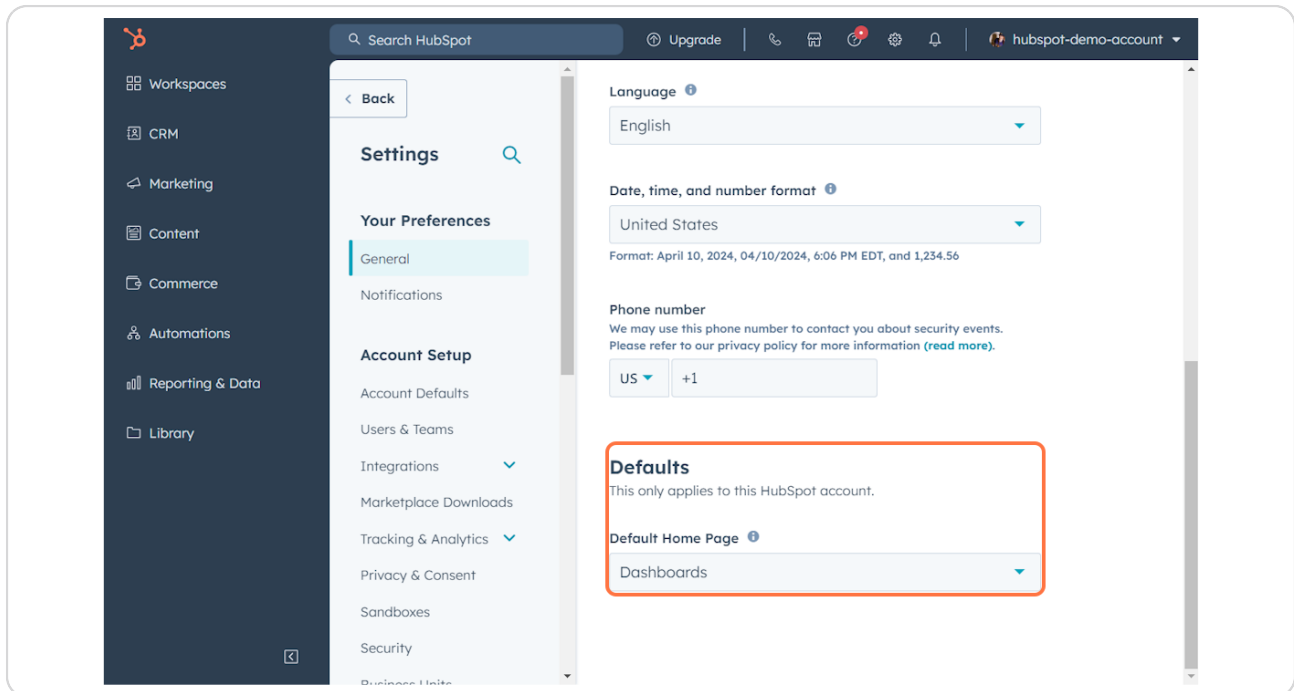
Click on Profile

Configure your name if needed.



STEP 6

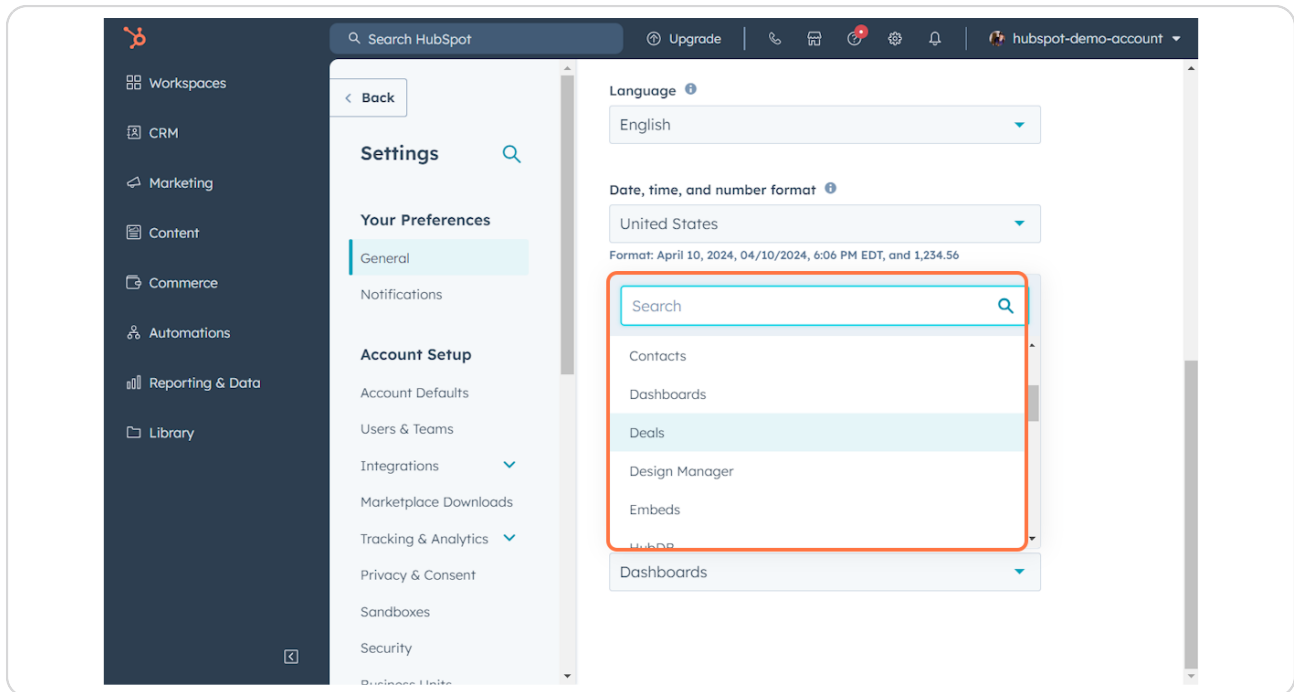
Scroll down to set your default homepage



STEP 7

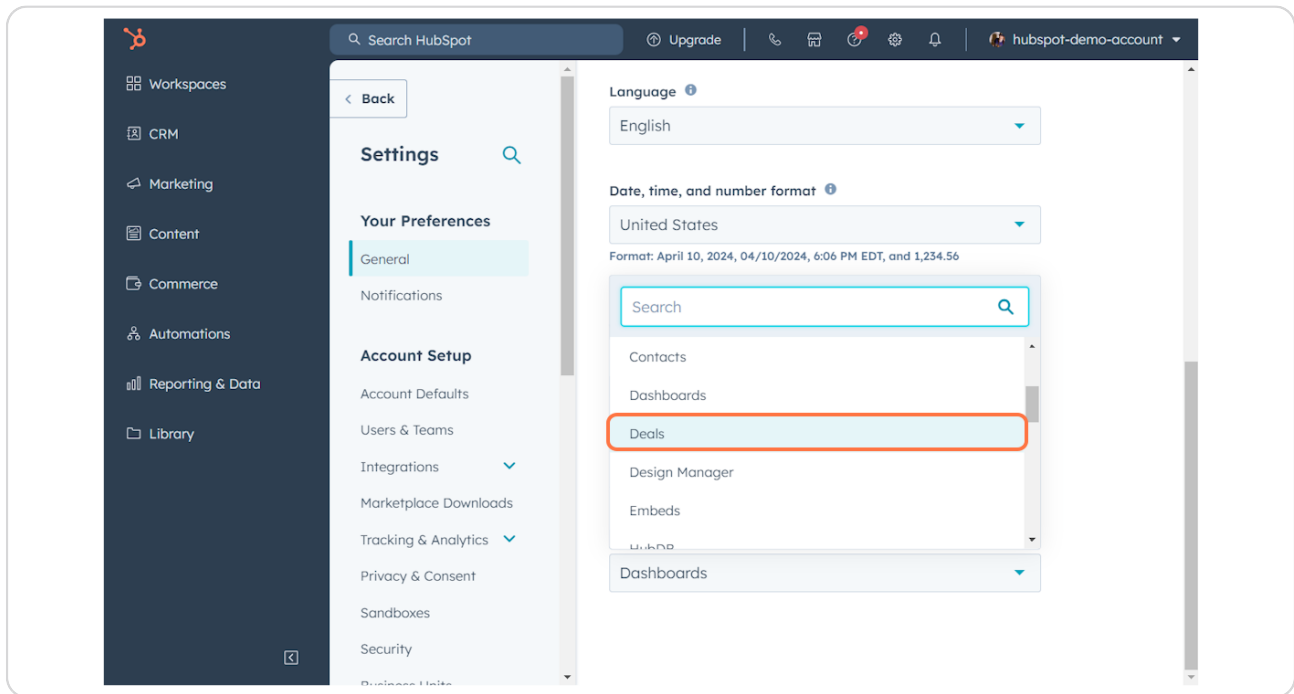
Select the home page you would wish to see

Ex. If you frequently work out of deals, you can set that as the default screen you will see when logging in.



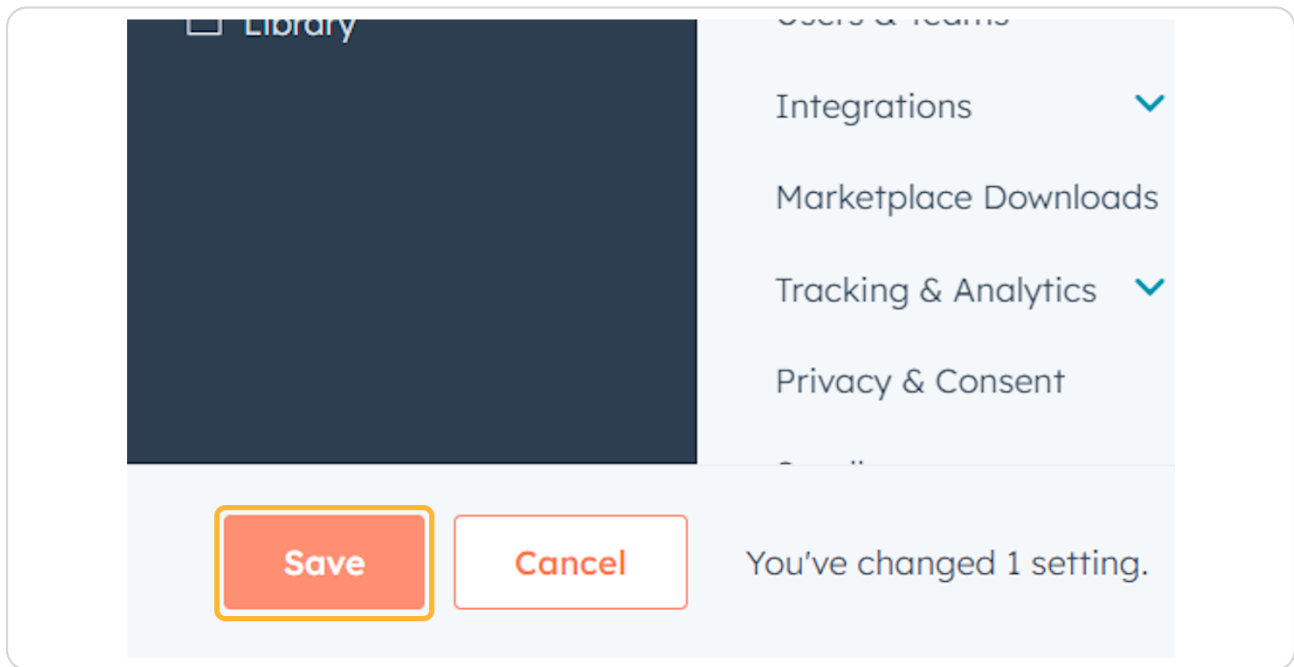
STEP 8

Make your selection



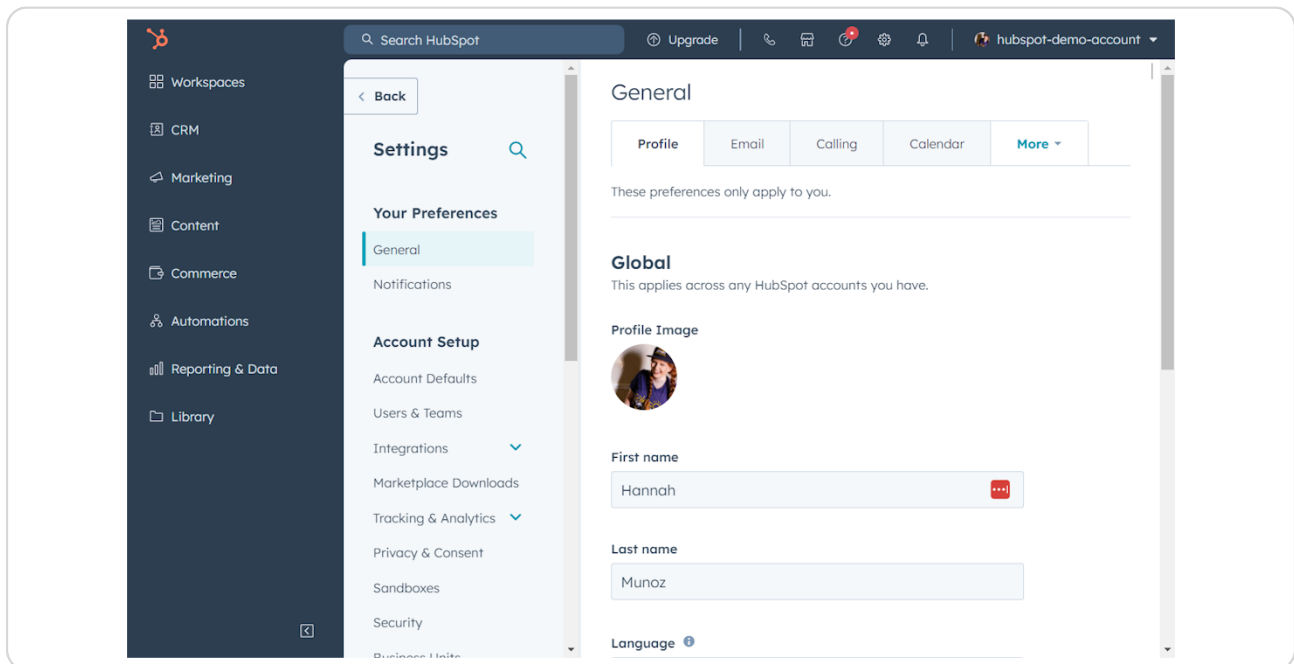
STEP 9

Click on Save



STEP 10

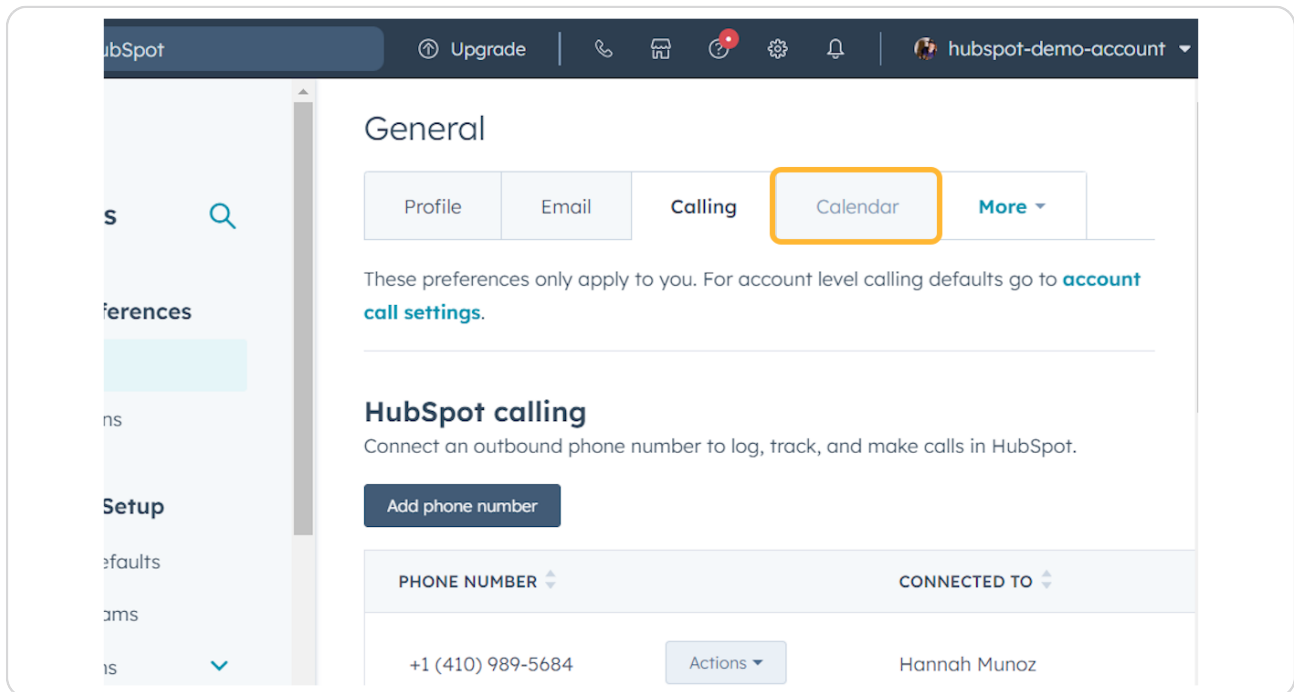
Scroll back up to the top



STEP 11

Click on Calendar

Scroll up to connect your calendar.



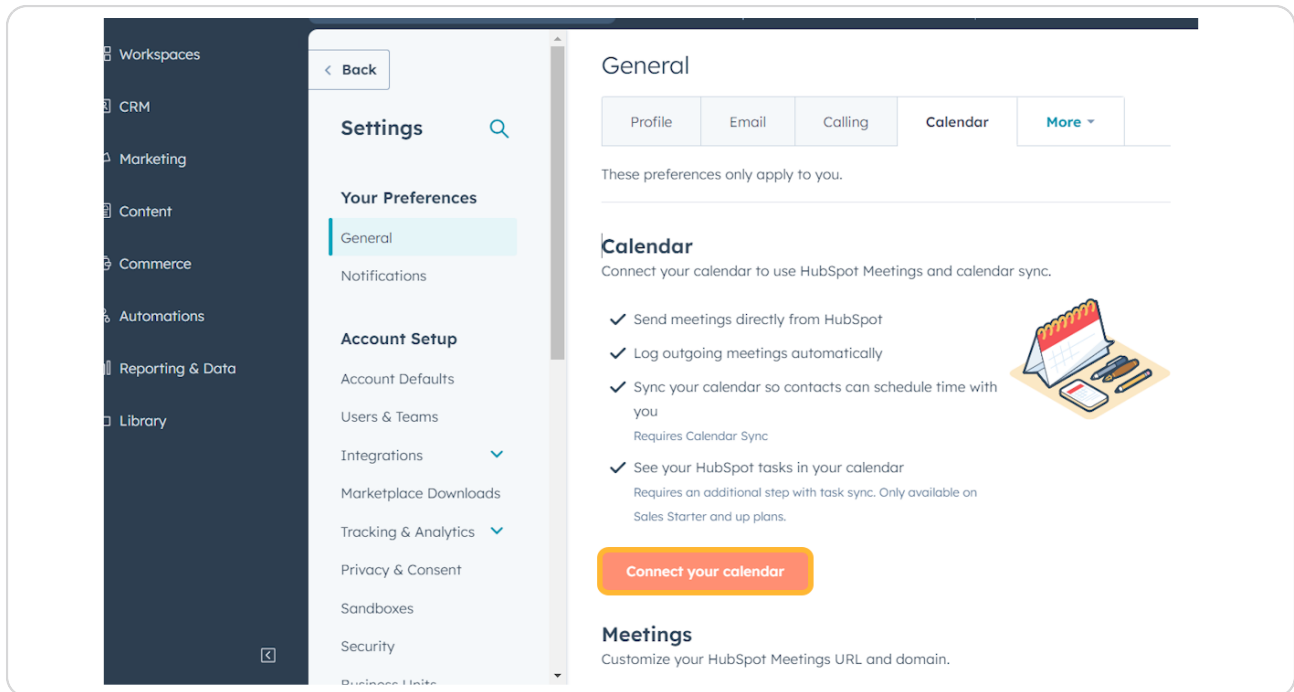
The screenshot shows the HubSpot user interface. At the top, there's a dark blue header with the HubSpot logo, an 'Upgrade' button, and several icons (phone, calendar, settings, notifications). The user's account is 'hubspot-demo-account'. On the left, a sidebar contains a search bar and a list of settings categories: 'Preferences', 'Setup', 'Defaults', 'Emails', and 'Integrations'. The main content area is titled 'General' and has tabs for 'Profile', 'Email', 'Calling', 'Calendar', and 'More'. The 'Calendar' tab is highlighted with an orange border. Below the tabs, a message states: 'These preferences only apply to you. For account level calling defaults go to [account call settings](#).' The section is titled 'HubSpot calling' with the subtitle 'Connect an outbound phone number to log, track, and make calls in HubSpot.' There is a button 'Add phone number'. Below this, a table lists connected phone numbers. The table has two columns: 'PHONE NUMBER' and 'CONNECTED TO'. The first row shows the phone number '+1 (410) 989-5684' and is connected to 'Hannah Munoz'. There is an 'Actions' button next to the phone number.

PHONE NUMBER	CONNECTED TO
+1 (410) 989-5684	Hannah Munoz

STEP 12

Click on Connect your calendar

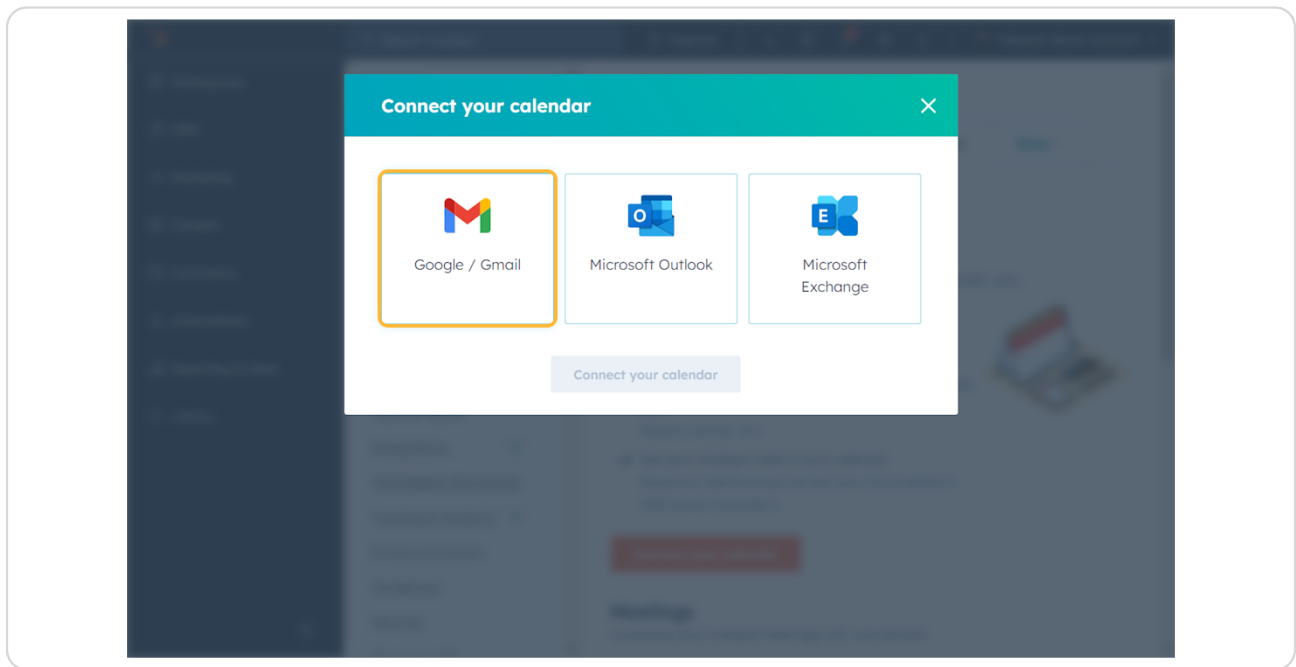
Your calendar may have automatically connected when you verified your email. If it did, you would see that connection here. If not, connect your calendar.



The screenshot shows the HubSpot Settings interface. On the left is a dark sidebar with navigation links: Workspaces, CRM, Marketing, Content, Commerce, Automations, Reporting & Data, and Library. The main content area is titled 'Settings' with a search icon. Below this, there are sections for 'Your Preferences' (General, Notifications) and 'Account Setup' (Account Defaults, Users & Teams, Integrations, Marketplace Downloads, Tracking & Analytics, Privacy & Consent, Sandboxes, Security, Business Units). The 'General' tab is selected, showing sub-tabs for Profile, Email, Calling, Calendar, and More. The 'Calendar' sub-tab is active, displaying a list of preferences with checkmarks: 'Send meetings directly from HubSpot', 'Log outgoing meetings automatically', 'Sync your calendar so contacts can schedule time with you' (with a note 'Requires Calendar Sync'), and 'See your HubSpot tasks in your calendar' (with a note 'Requires an additional step with task sync. Only available on Sales Starter and up plans.'). An orange button labeled 'Connect your calendar' is prominently displayed. Below the preferences, the 'Meetings' section is visible, with the text 'Customize your HubSpot Meetings URL and domain.' An illustration of a calendar and pens is also present.

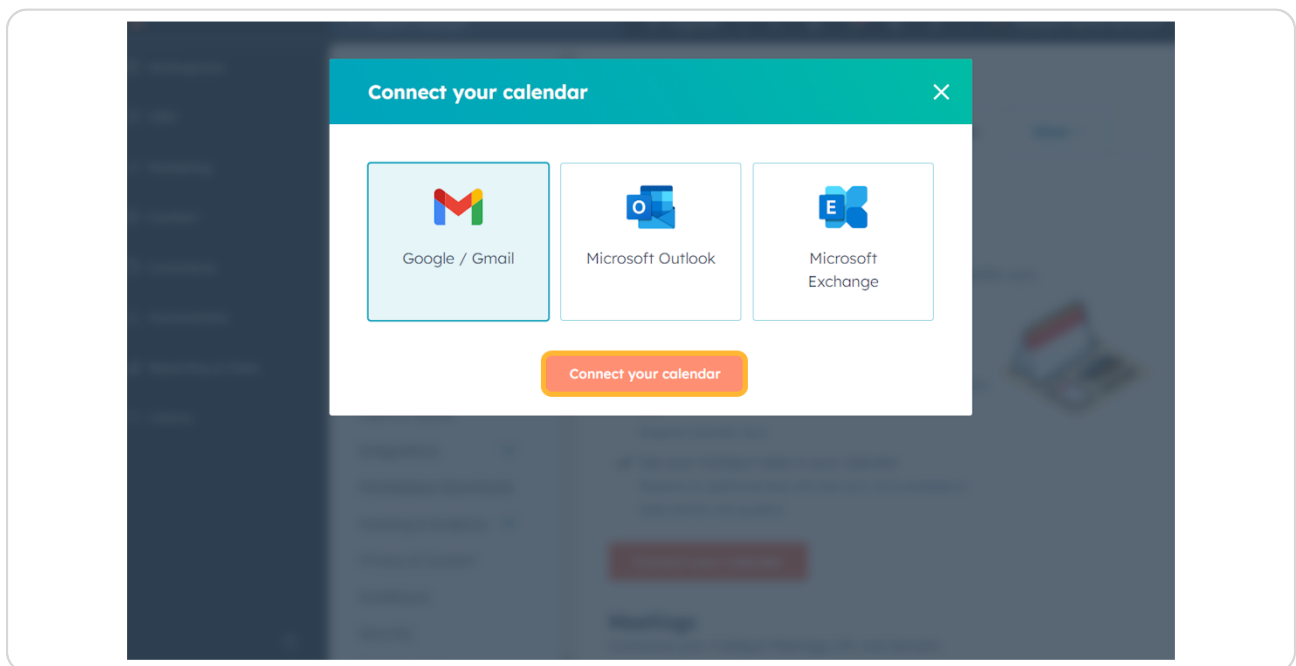
STEP 13

Select your provider



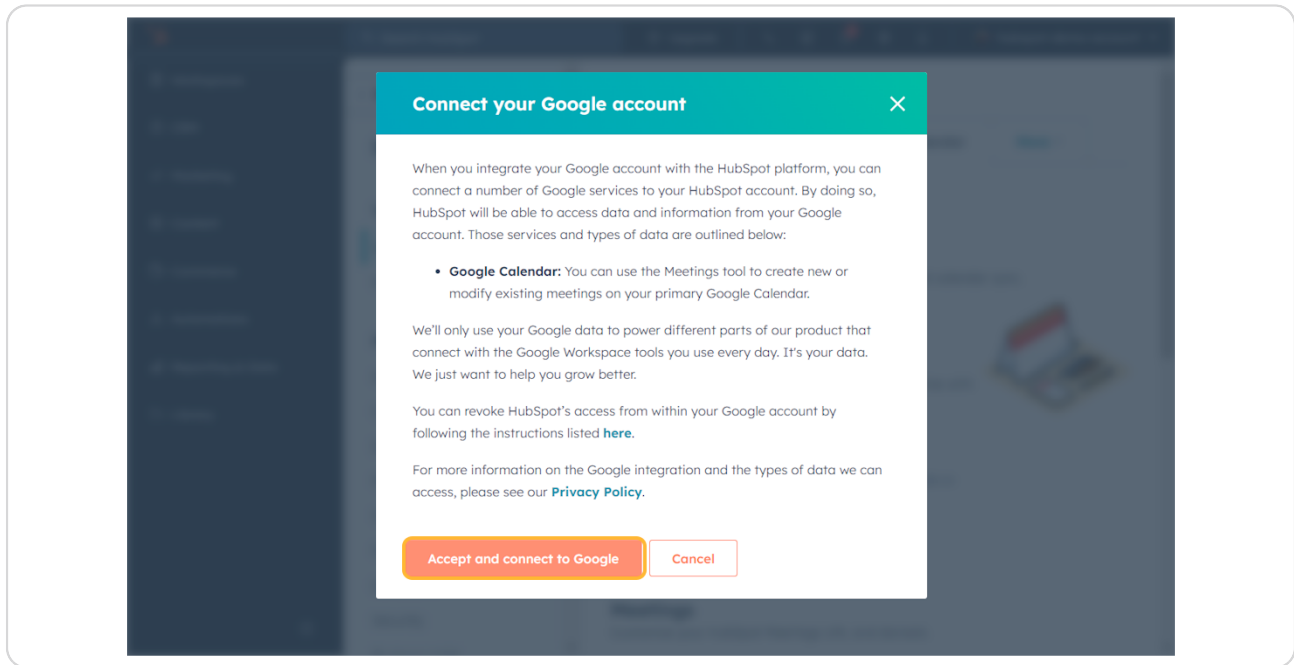
STEP 14

Click on Connect your calendar



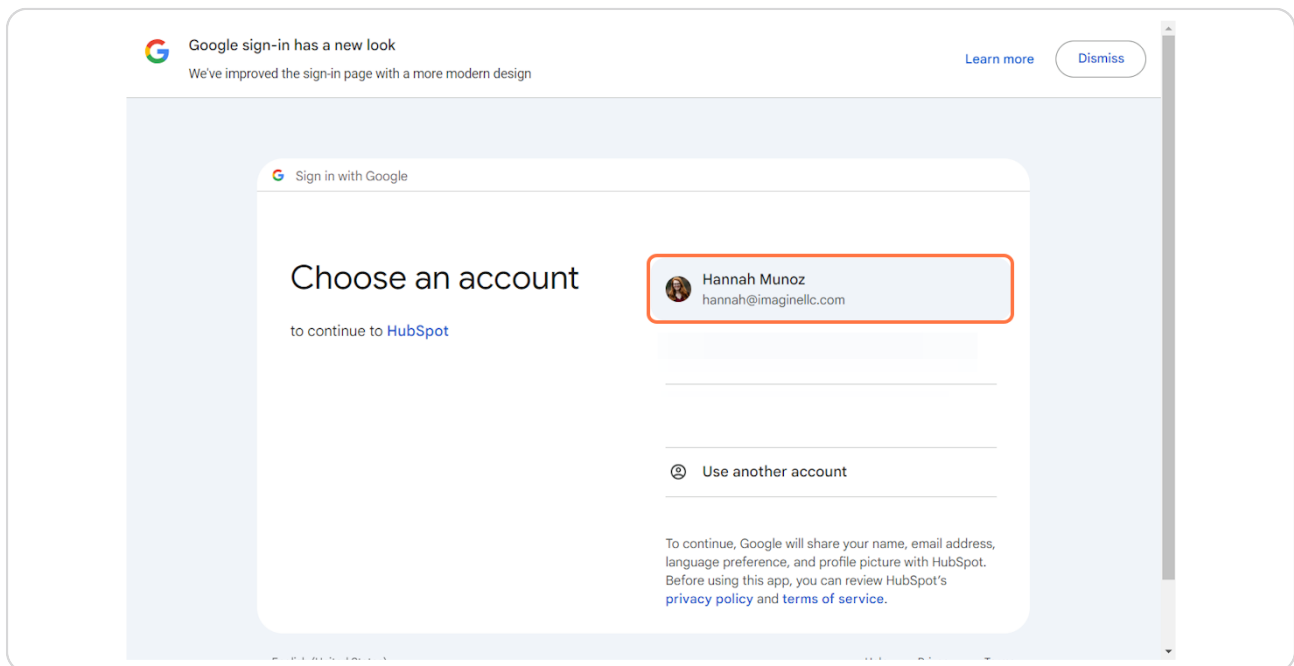
STEP 15

Click on Accept and connect to Google (or Microsoft)



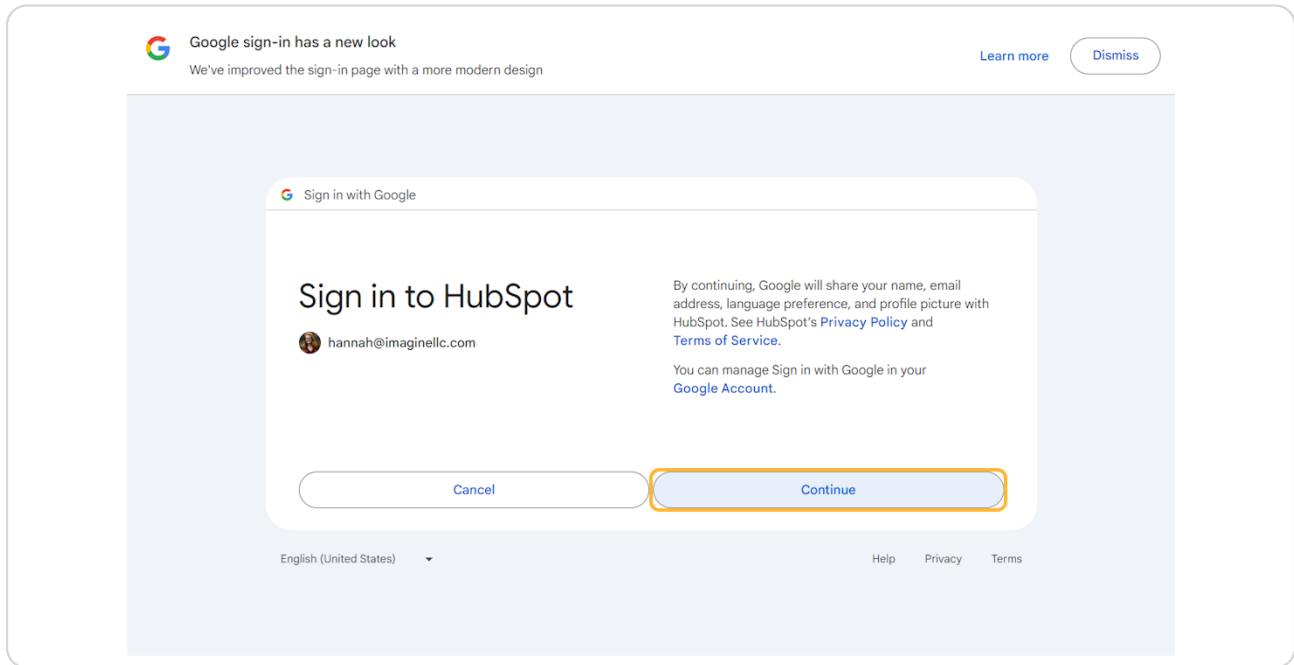
STEP 16

Click on the account you want to connect



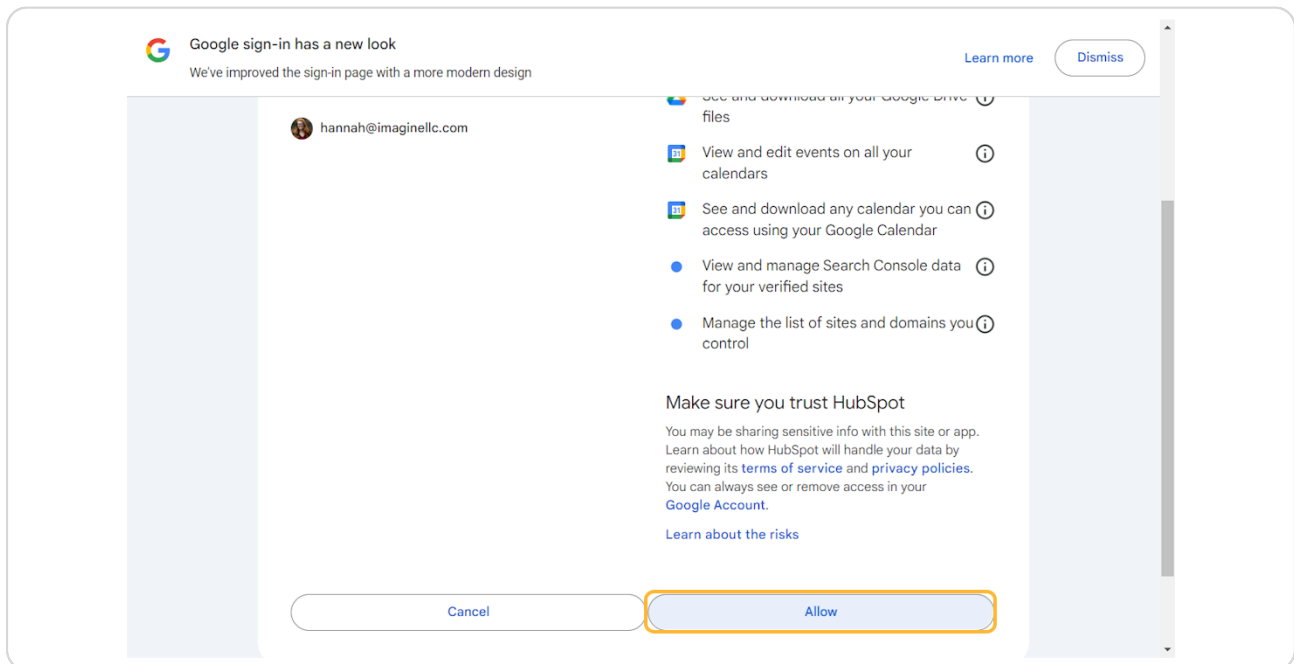
STEP 17

Click on Continue



STEP 18

Scroll down and Click on Allow




STEP 19

You should now see your account

Calendar

Connect your calendar to use HubSpot Meetings and calendar sync.

ACCOUNT

 hannah@imaginellc.com
● Connected

Account Settings

Manage your calendar accounts

☒ Calendar Sync

STEP 20

Congratulations! Basic account setup is complete.

