

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

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

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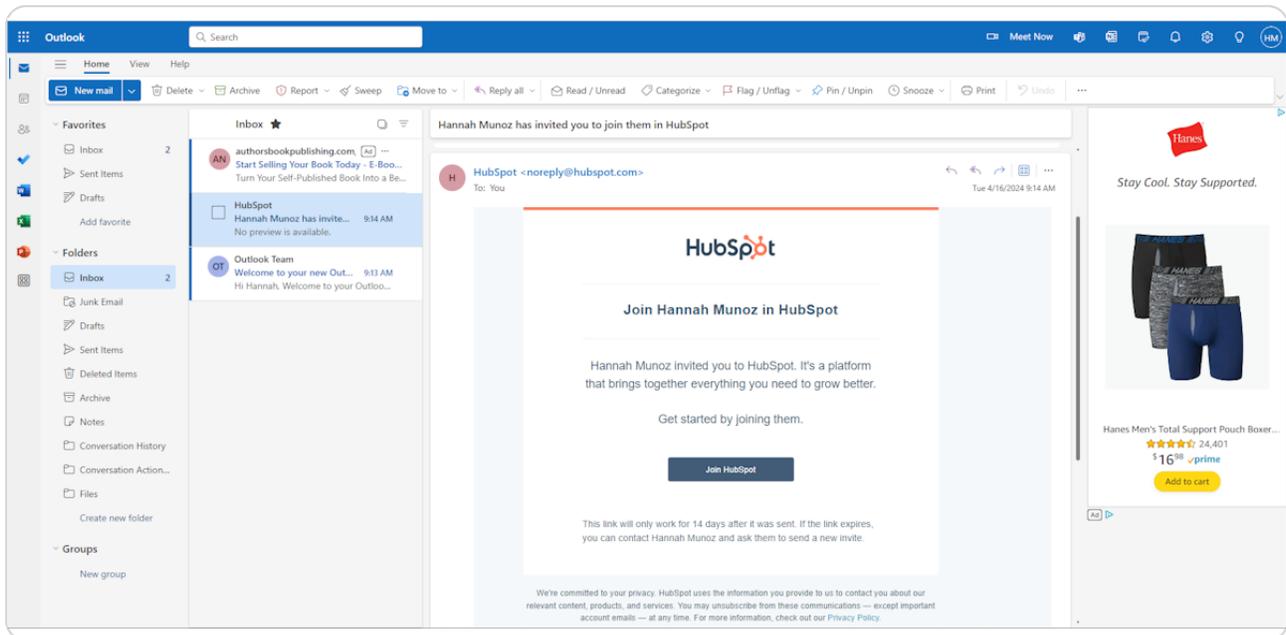
Accept Your Invite to HubSpot

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.



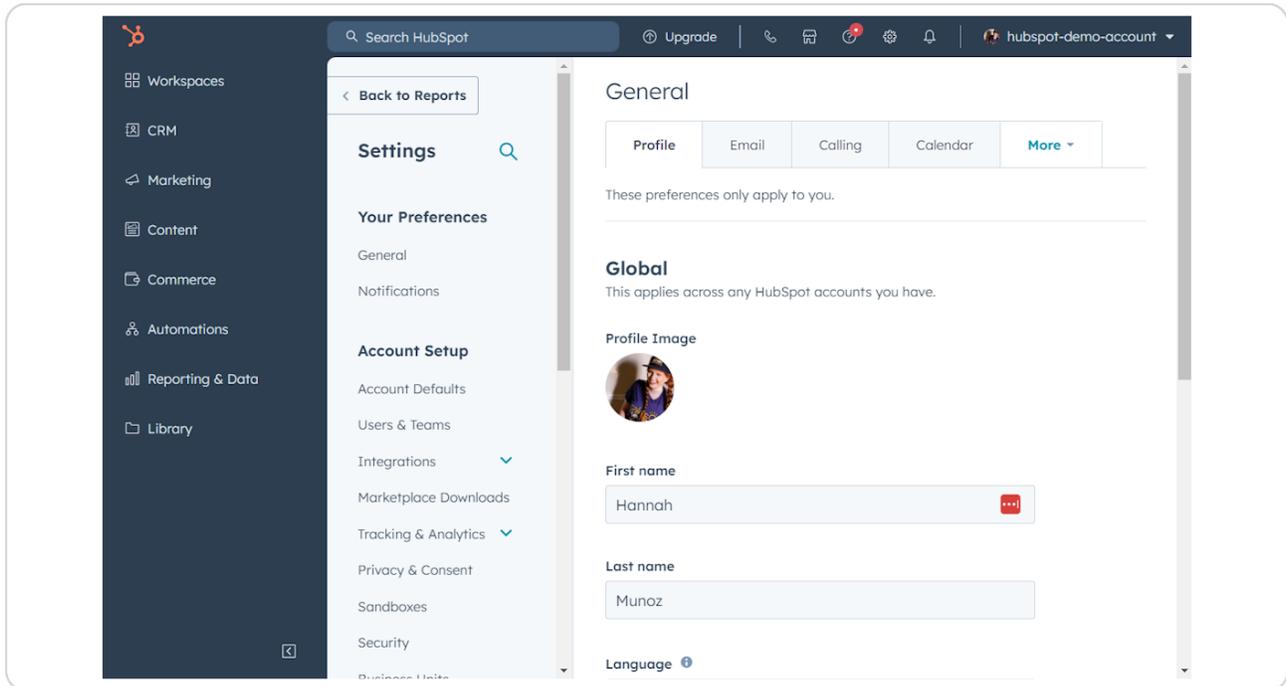
Set up Your Account in HubSpot

9 Steps

STEP 2

Setup Your Account

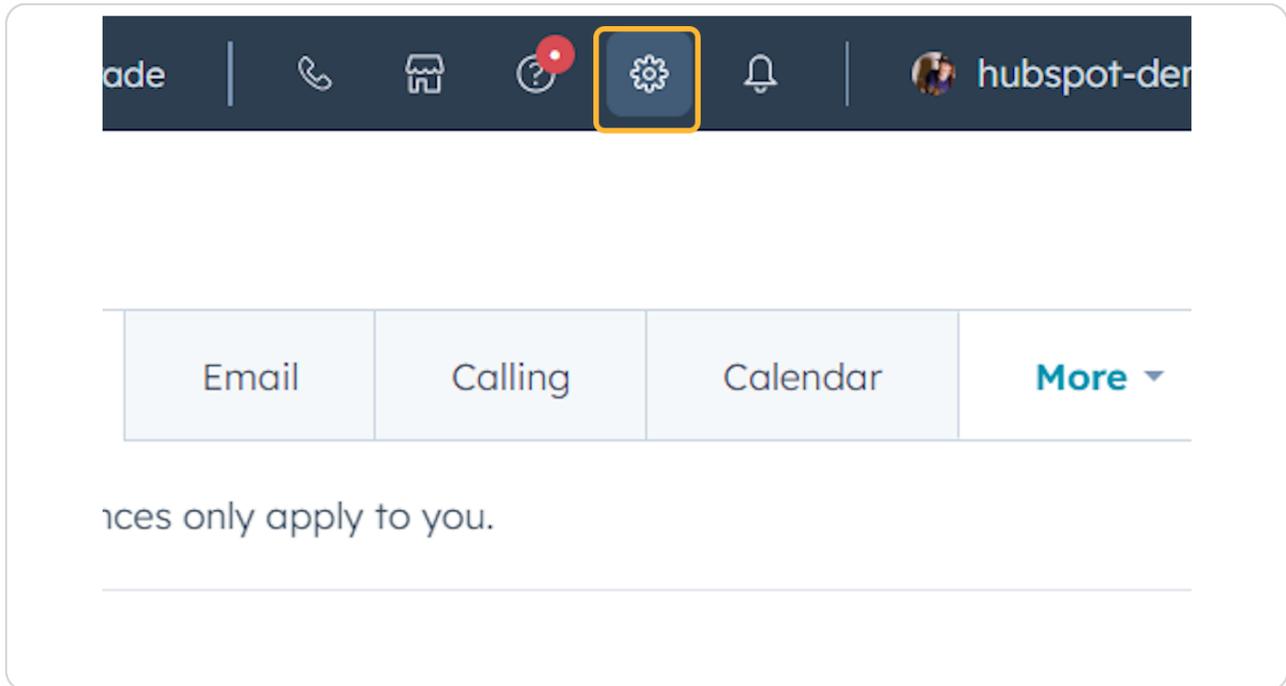
Once you have setup your login information, you'll need to configure your account defaults.



STEP 3

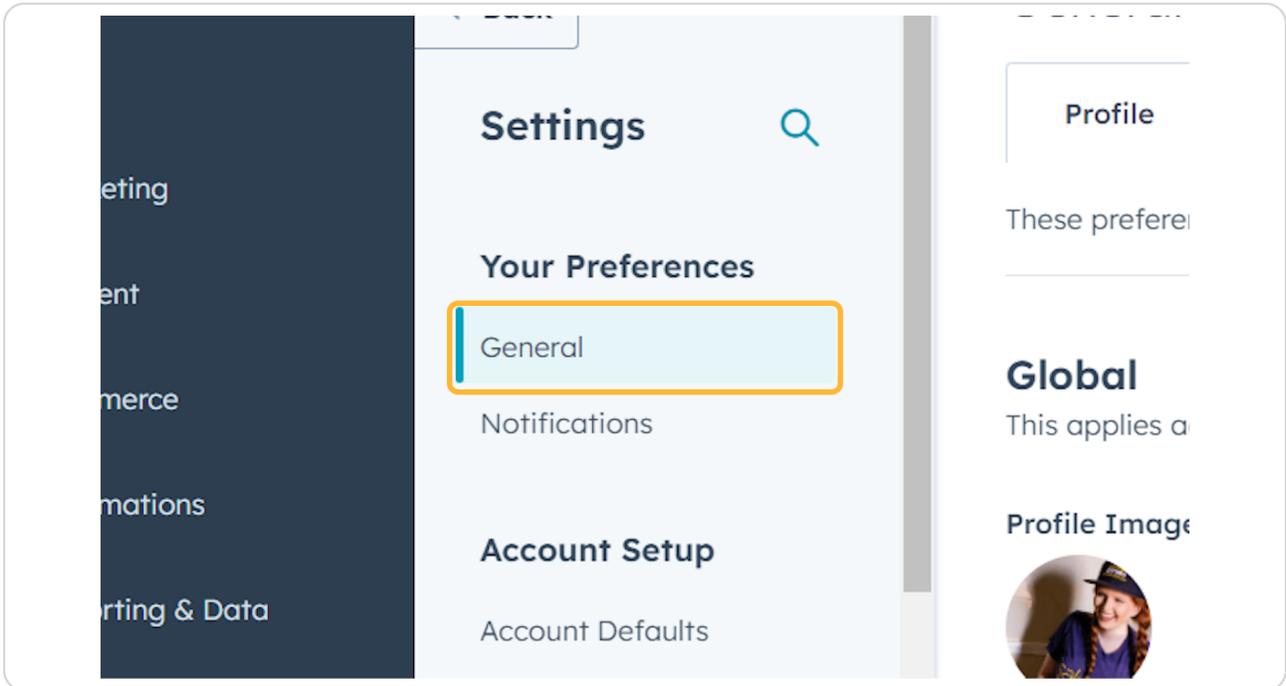
Click on Settings

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



STEP 4

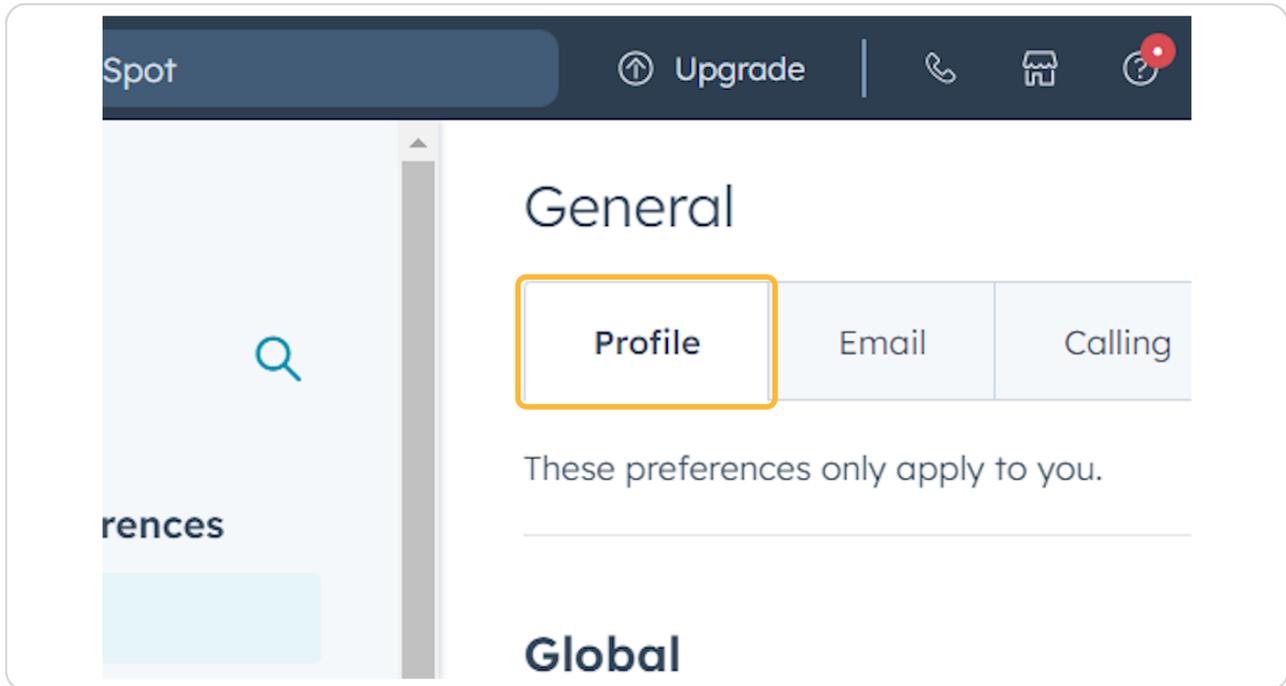
Click on General



STEP 5

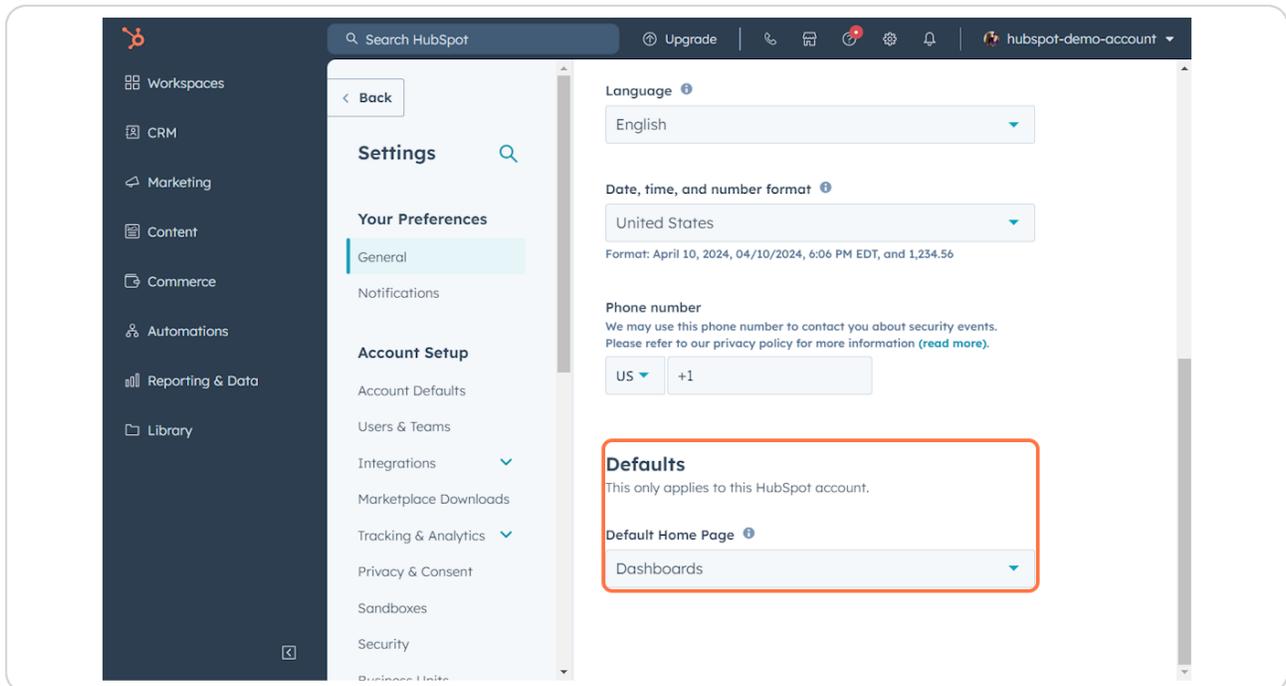
Click on Profile

Configure your name if needed.



STEP 6

Scroll down to set your default homepage

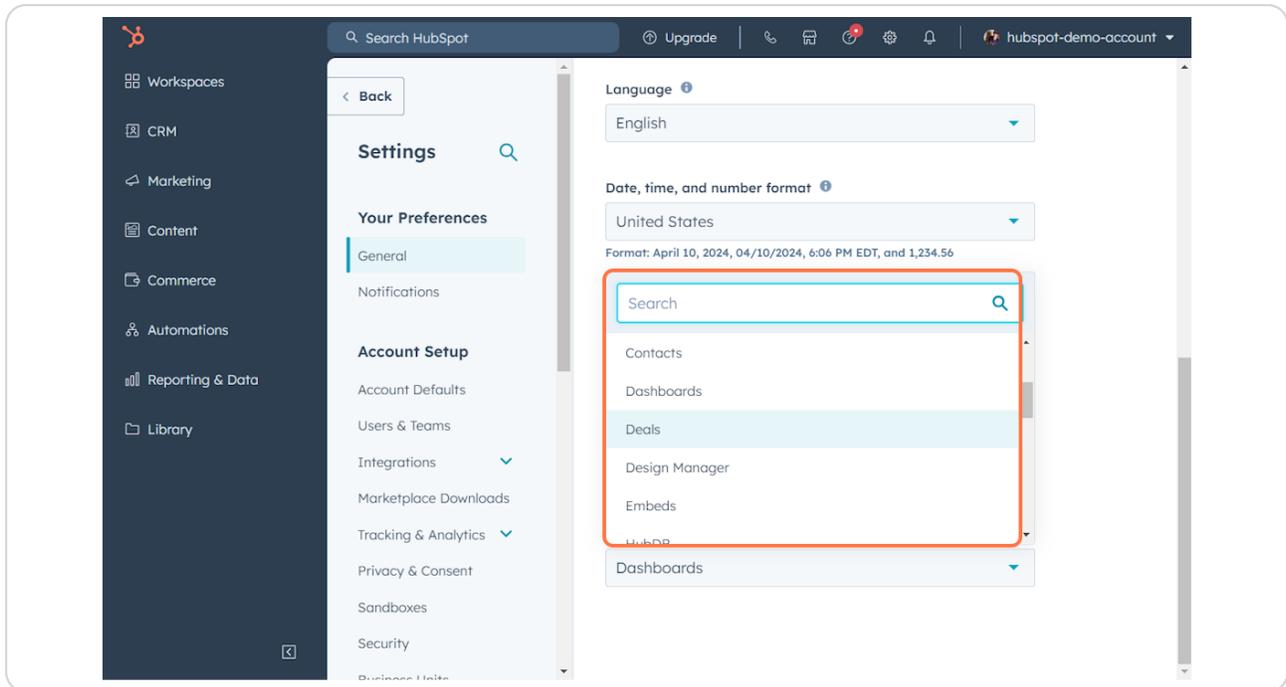


The screenshot displays the HubSpot user interface. On the left is a dark sidebar with navigation options: Workspaces, CRM, Marketing, Content, Commerce, Automations, Reporting & Data, and Library. The main content area is titled 'Settings' and includes a search bar and a 'Back' button. Under 'Your Preferences', the 'General' section is selected. Below this, the 'Account Setup' section is visible, containing options for Account Defaults, Users & Teams, Integrations, Marketplace Downloads, Tracking & Analytics, Privacy & Consent, Sandboxes, and Security. The 'Defaults' section is highlighted with a red rectangular box and contains the text 'This only applies to this HubSpot account.' and a 'Default Home Page' dropdown menu currently set to 'Dashboards'. Above this section, other settings like Language (English), Date, time, and number format (United States), and Phone number are visible.

STEP 7

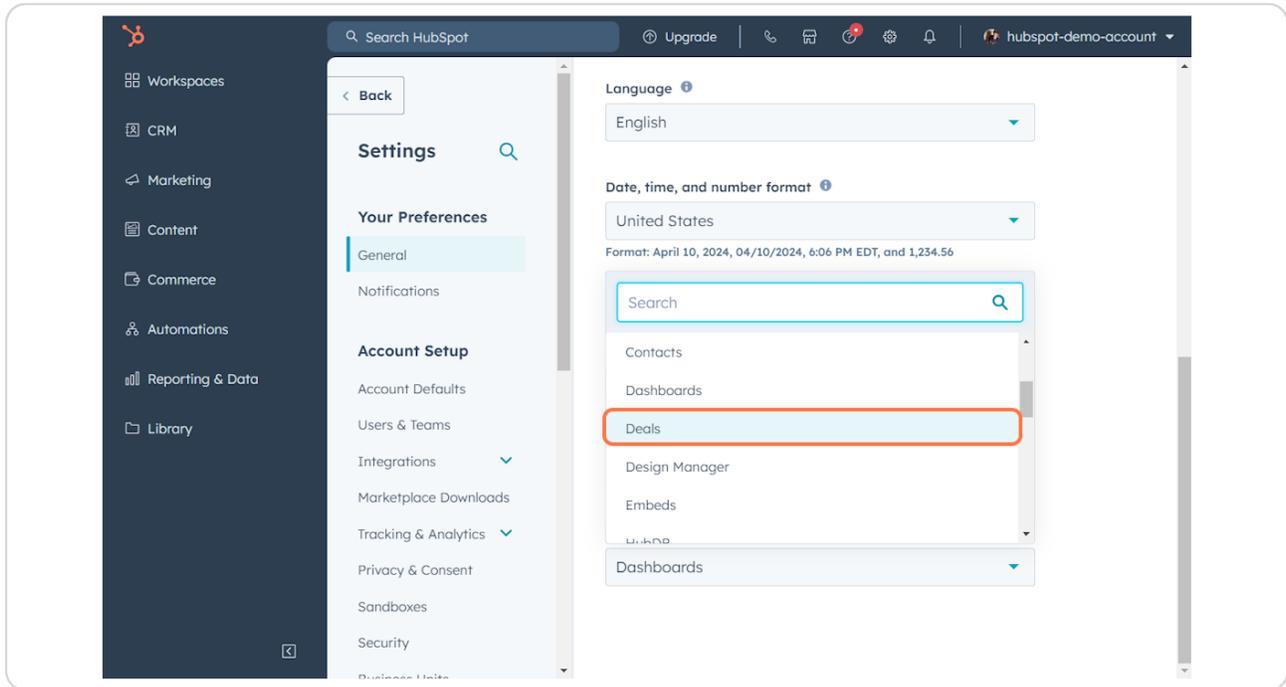
Select the home page you would wish to see

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



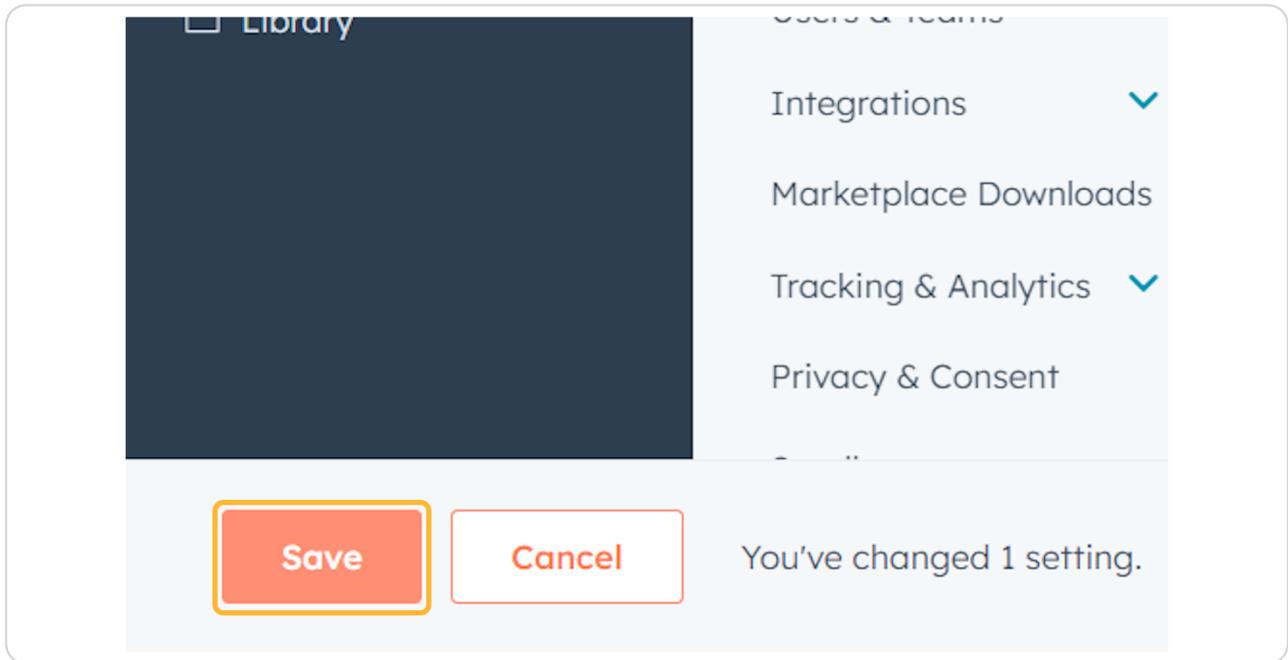
STEP 8

Make your selection



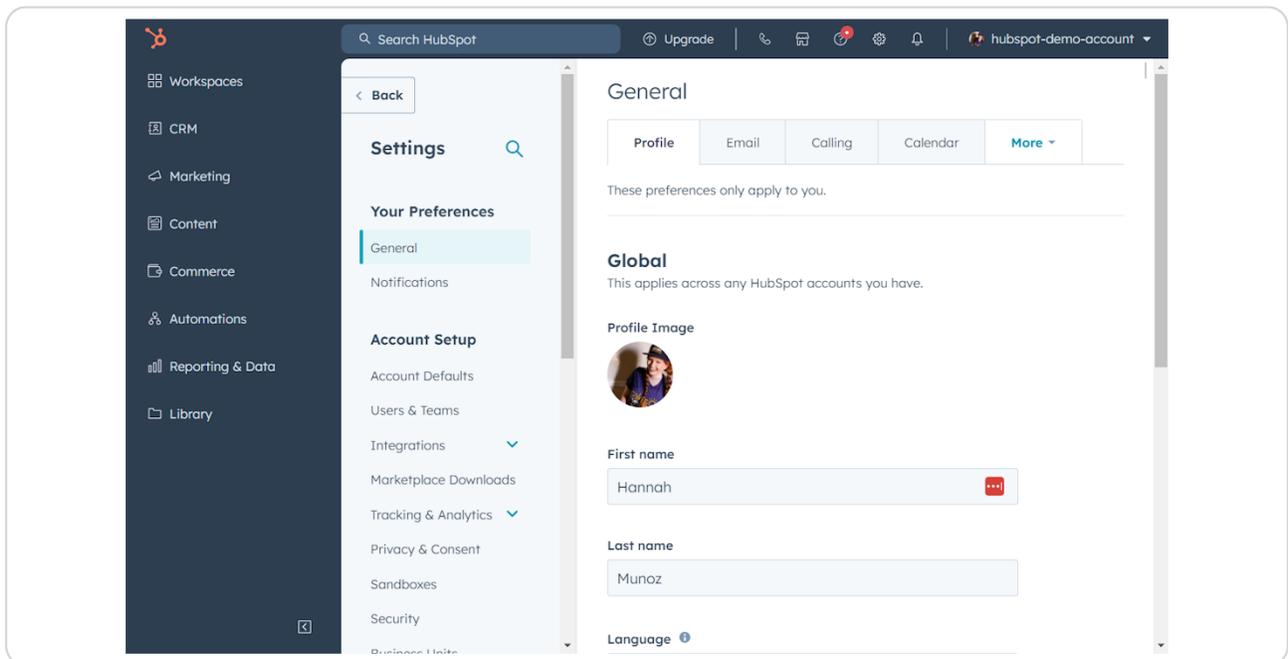
STEP 9

Click on Save



STEP 10

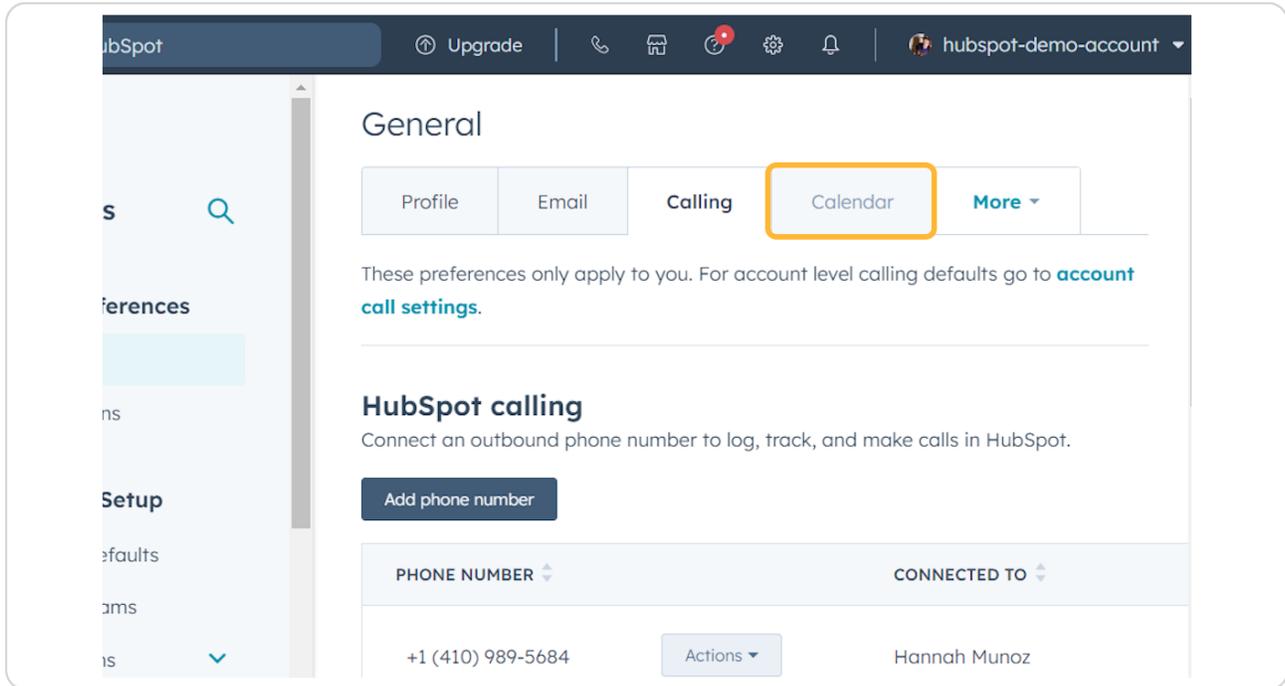
Scroll back up to the top



STEP 11

Click on Calendar

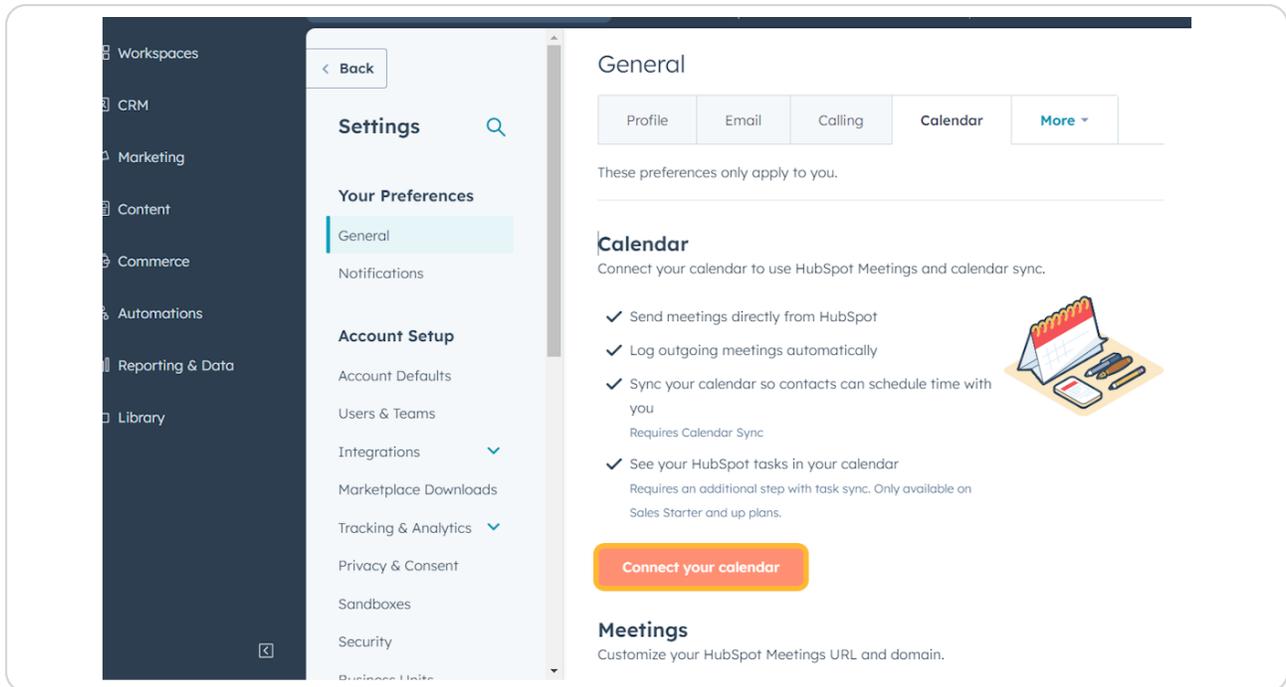
Scroll up to connect your calendar.



STEP 12

Click on Connect your calendar

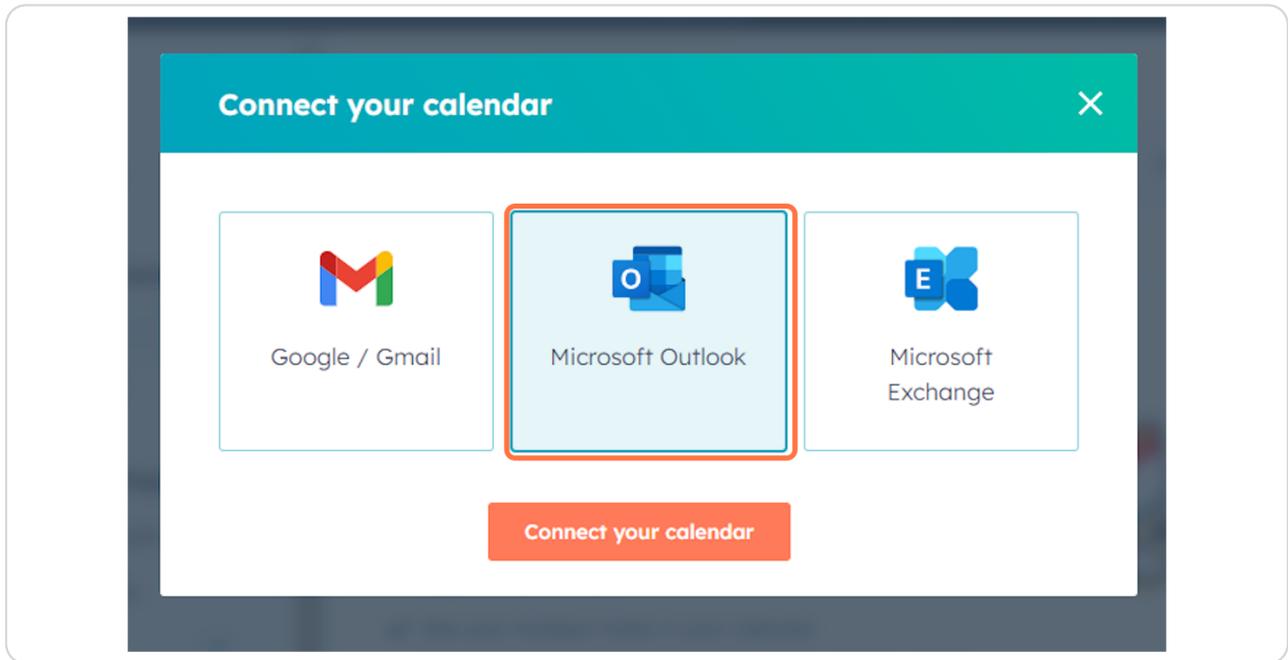
Your calendar may have automatically connected when you verified your email. If it did, you would see that connection here. If not, connect your calendar.



The screenshot shows the HubSpot Settings interface. On the left is a dark sidebar with navigation options: Workspaces, CRM, Marketing, Content, Commerce, Automations, Reporting & Data, and Library. The main content area is titled 'Settings' and has a search icon. It is divided into 'Your Preferences' and 'Account Setup'. Under 'Your Preferences', 'General' is selected, and 'Calendar' is the active tab. The 'Calendar' section includes a 'Connect your calendar' button and a list of features with checkmarks: 'Send meetings directly from HubSpot', 'Log outgoing meetings automatically', 'Sync your calendar so contacts can schedule time with you' (with a sub-note 'Requires Calendar Sync'), and 'See your HubSpot tasks in your calendar' (with a sub-note 'Requires an additional step with task sync. Only available on Sales Starter and up plans.'). An illustration of a calendar and pens is shown to the right of the list. Below the list is a 'Meetings' section with the text 'Customize your HubSpot Meetings URL and domain.'

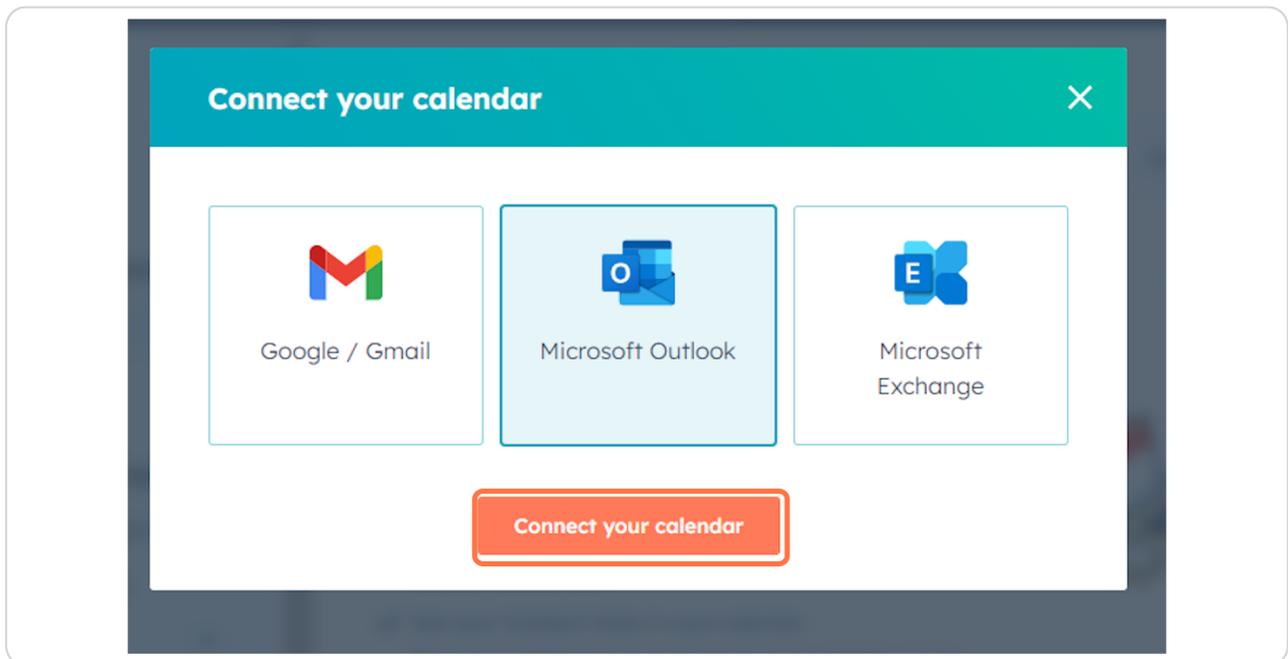
STEP 13

Select your provider



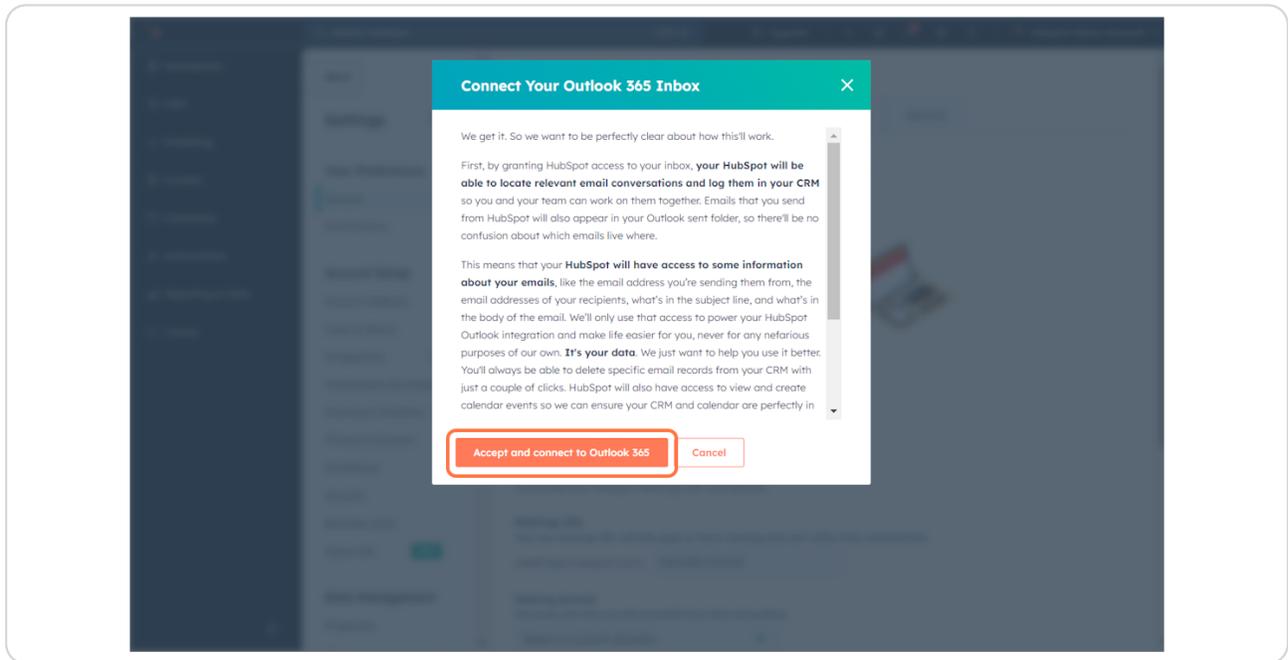
STEP 14

Click on Connect your calendar



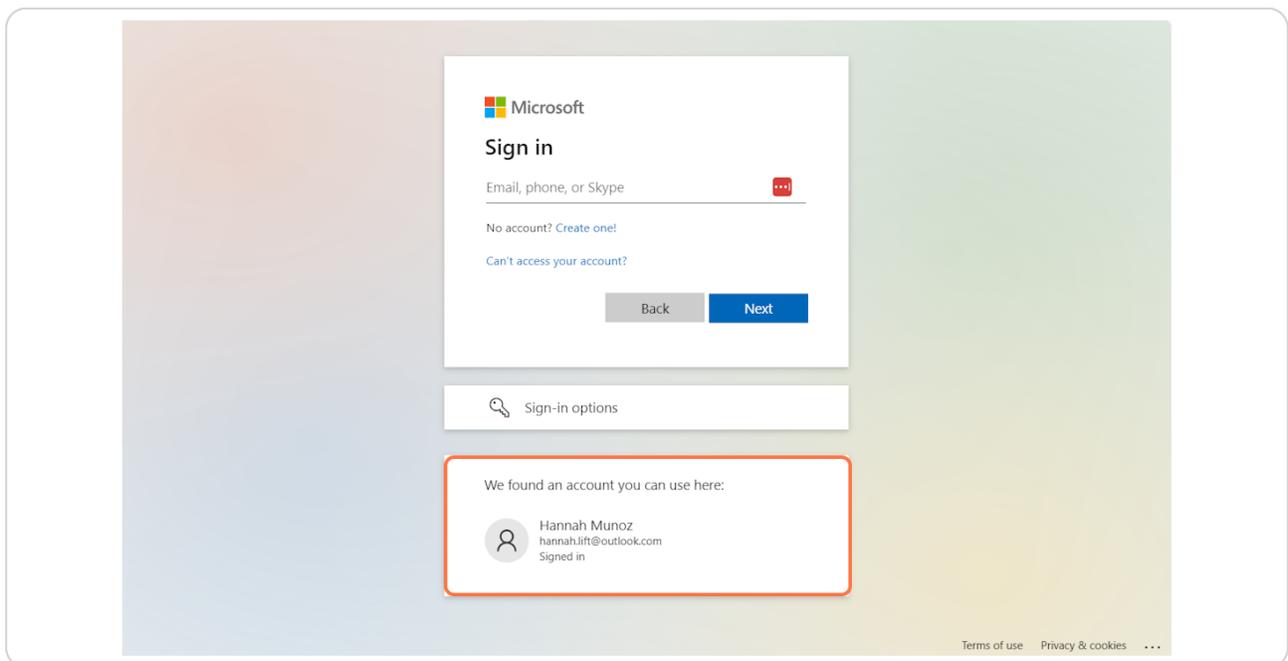
STEP 15

Click on Accept and connect to Outlook 365



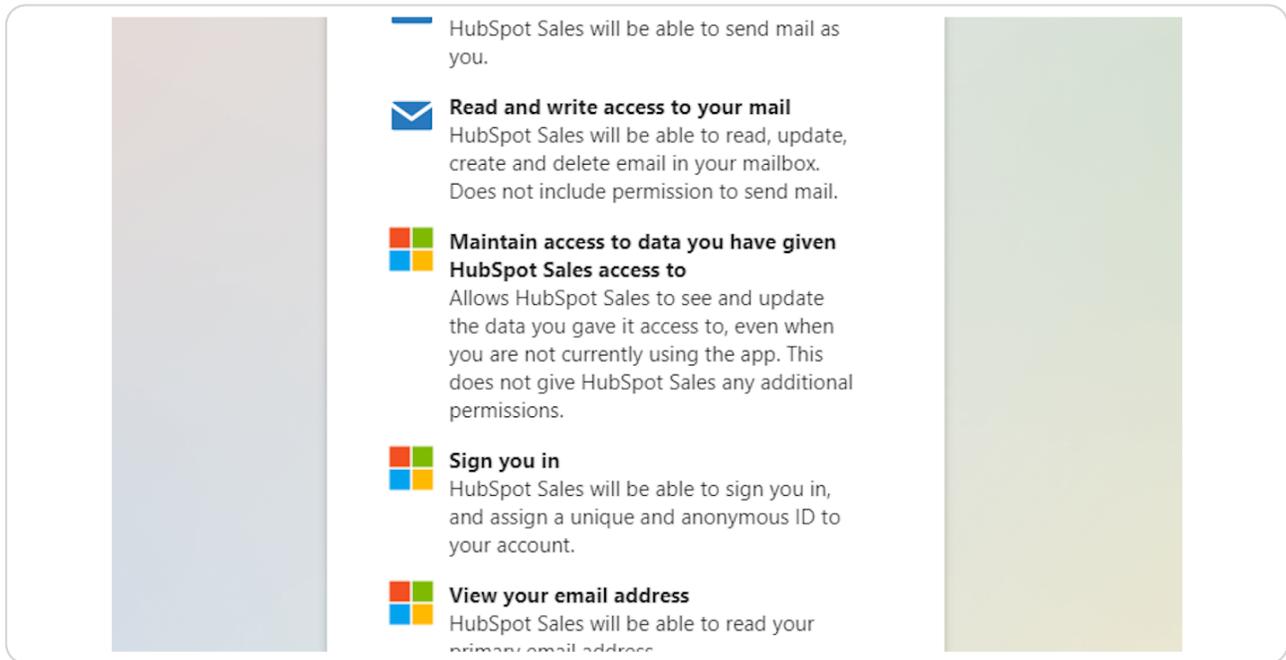
STEP 16

Click on the account you want to connect



STEP 17

Scroll down and Click on Accept

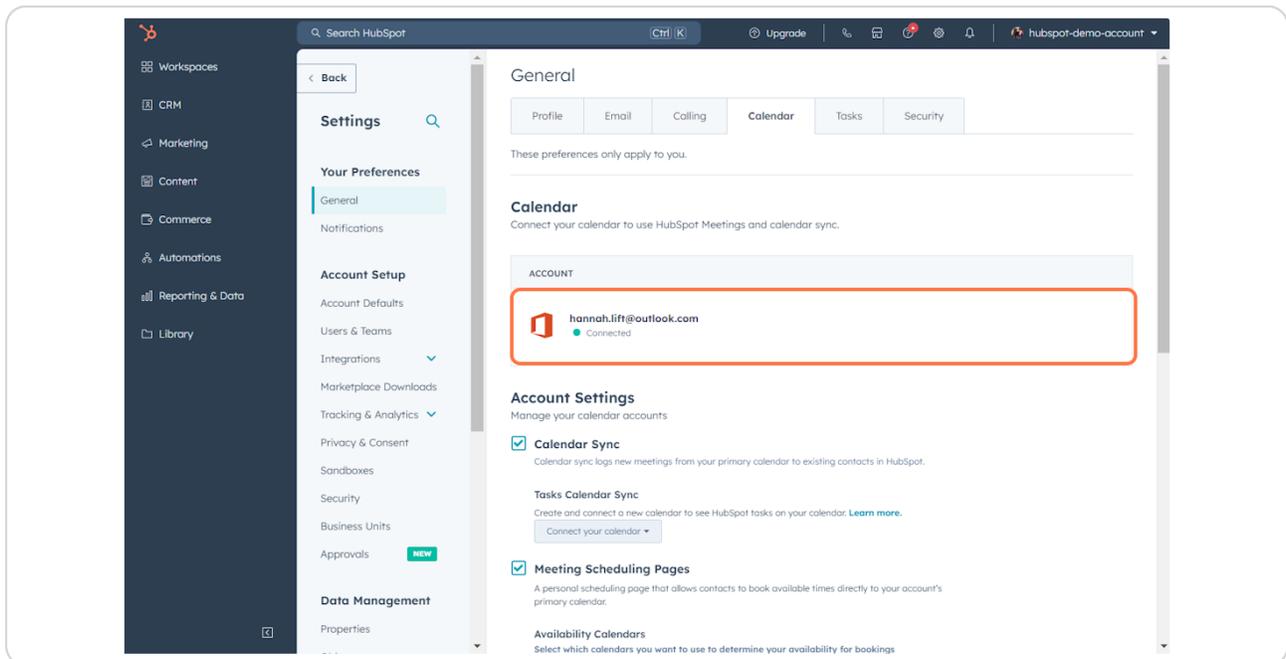


The screenshot shows a list of permissions for HubSpot Sales. Each permission is accompanied by a small icon and a brief description of what the permission allows.

- HubSpot Sales will be able to send mail as you.**
- Read and write access to your mail**
HubSpot Sales will be able to read, update, create and delete email in your mailbox. Does not include permission to send mail.
- Maintain access to data you have given HubSpot Sales access to**
Allows HubSpot Sales to see and update the data you gave it access to, even when you are not currently using the app. This does not give HubSpot Sales any additional permissions.
- Sign you in**
HubSpot Sales will be able to sign you in, and assign a unique and anonymous ID to your account.
- View your email address**
HubSpot Sales will be able to read your primary email address.

STEP 18

You should now see your account



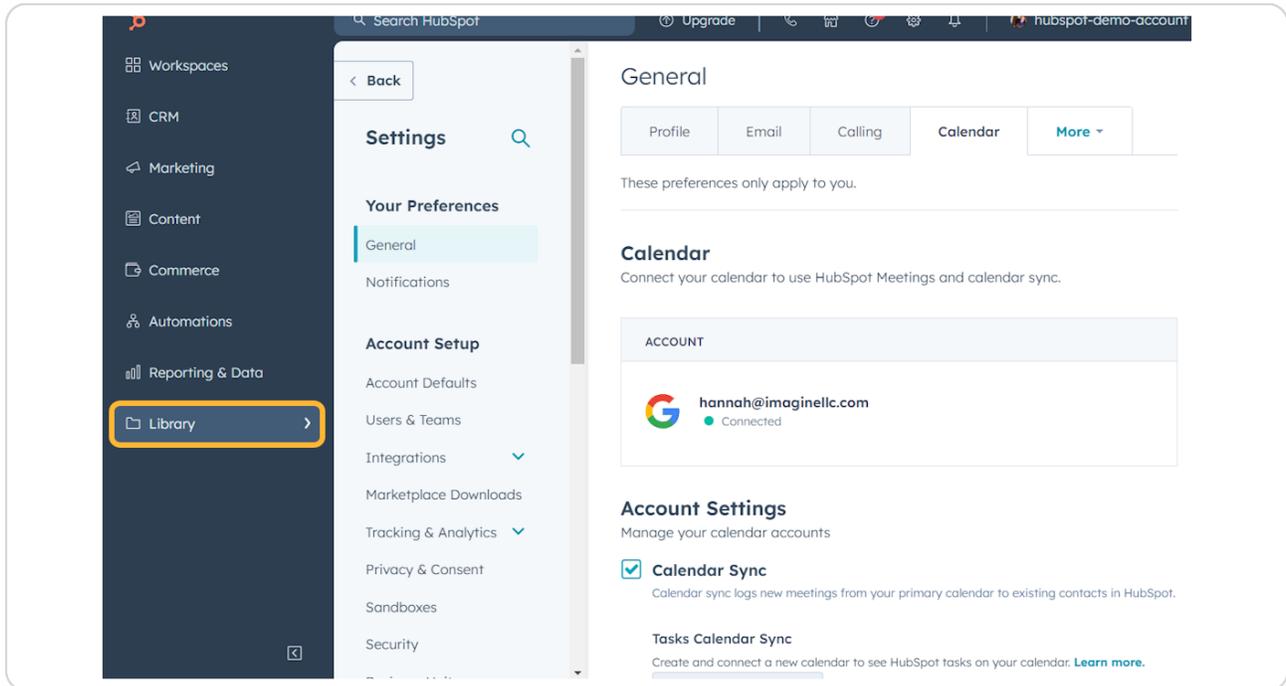
The screenshot shows the HubSpot account settings page. The left sidebar contains navigation options like Workspaces, CRM, Marketing, Content, Commerce, Automations, Reporting & Data, and Library. The main content area is titled 'Settings' and has a 'Back' button. Under 'Your Preferences', the 'General' tab is selected. The 'Calendar' sub-tab is active, showing options for 'Profile', 'Email', 'Calling', 'Calendar', 'Tasks', and 'Security'. The 'Calendar' section is highlighted with a red box and contains the following information:

- ACCOUNT**
- hannah.lift@outlook.com (Connected)
- 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.](#)
Connect your calendar
- Meeting Scheduling Pages**
A personal scheduling page that allows contacts to book available times directly to your account's primary calendar.
- Availability Calendars**
Select which calendars you want to use to determine your availability for bookings

STEP 19

Click on Library

This is in the navigation bar on the left side of your screen.



STEP 20

Congratulations! Basic account setup is complete.

