Brad Nussbaum

From: Brad Nussbaum
Sent: March-17-23 01:37 PM
To: Christina Buck; John Toubia; Sean Ewing; Kim Proctor
Cc: Craig Murray; Scott Corbett; Peter Hoferichter; Gabrielle Eagles; James Cook
Subject: HubSpot Linking to Outlook and Windows

Hello and good afternoon,

I hope everyone is well.

Linking HubSpot with Outlook, Windows and Chrome is extremely easy to do. Just follow the instructions and login into HubSpot when requested. James, Peter and I did it yesterday based on the instructions from HubSpot (below) and I tested it today and it worked and Outlook and HubSpot added emails to a test account that I set up.

The links and instructions are below and it would be great if you could try to do the installation. I am also happy to conduct a training session and walk the team through the process. It is very simple to install both.

Here are the links and instructions:
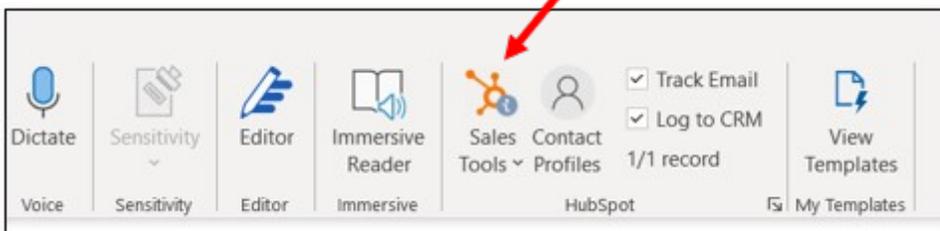
Outlook Setup
https://knowledge.hubspot.com/email-tracking/get-started-with-the-outlook-desktop-add-in

Chrome Extension Setup
https://knowledge.hubspot.com/email-tracking/get-started-with-the-hubspot-sales-chrome-extension

One suggestion, after setting up HubSpot for Windows you will see a HubSpot icon in the Outlook Toolbar. Click on the dropdown menu and open settings. And in the bottom of the settings under "Never Log" add "sheridannurseries.com" so that internal emails do not get tracked. The menu will look like this:

Outlook Toolbar

HubSpot Settings Window

Please let us know if you have any questions or require any assistance. We are here to help.

Thanks and be well.

Brad

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