

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

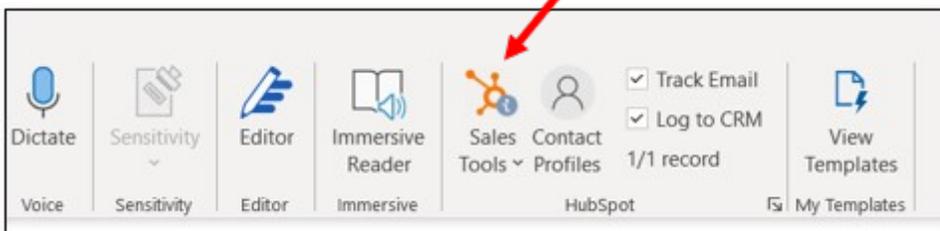
<https://knowledge.hubspot.com/email-tracking/get-started-with-the-outlook-desktop-add-in>

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

Settings ×

Advanced Help

HubSpot
Version 3.0.1.290

Logged in as: **bnussbaum@sheridannurseries.com**

Your inbox is not connected to your HubSpot account. Some tools won't be available.

Connect inbox

Switch connected HubSpot account

sheridan-nurseries-crm-sandbox.sheridannurseries.com - 2216 ▼

Sidebar

Show Contact Profiles

Log and track preferences

Each time you compose a new email, your log and track options will be set to the preferences you select below.

Log email Track email

Association defaults

Select types of associations to log by default.

Existing contacts
 New contacts
 Companies
 Deals
 Tickets

Never log

Emails sent to addresses you define below will never be saved in your CRM, even if the log setting is enabled.

Add

sheridannurseries.com **Remove**

Close

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

Thanks and be well.

Brad



Sheridan
Nurseries

**NEVER STOP
GROWING**

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