

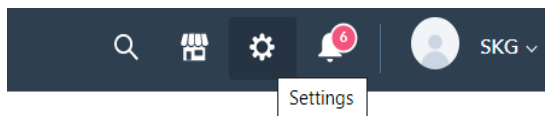


HubSpot – Email Guide

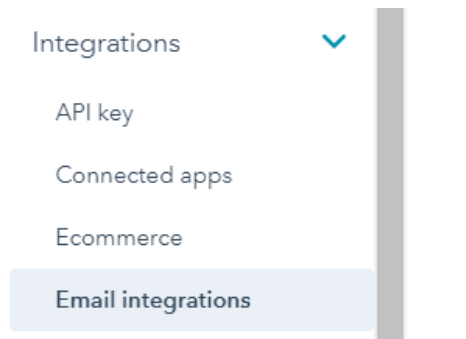
This document will instruct you on how to connect your Office 365 Email and how to install the Office 365 Add-in.

How to Connect Your Email:

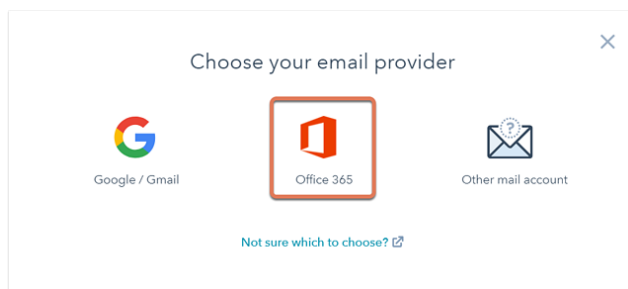
- In your HubSpot account, click the **Settings** icon settings in the main navigation bar.



- In the left sidebar menu, navigate to **Integrations > Email integrations**.



- Click **Connect an Inbox**
- Next, select **Office 365**



- Read through what to expect when you connect your Office 365 inbox to HubSpot, then click **Continue**.

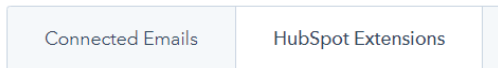


- You will be prompted to log in to your Office 365 account. Enter the **email address** (xxx@skgtexas.com) of the Office 365 account you want to use.
- You will be redirected back to your settings where the connection will be verified and completed. A dialog box will appear to inform you that your Office 365 inbox is now connected to HubSpot.

How to Download the Office 365 Add-in

- In your HubSpot account, click the **Settings** icon settings in the main navigation bar.
- In the left sidebar menu, navigate to **Integrations > Email integrations**.
- Click on the **HubSpot Extensions** Tab

Email Integrations

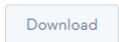


- Go to the **HubSpot Sales add-in for Office 365**, and click **Download**



HubSpot Sales add-in for Office 365

The Office 365 add-in works with Outlook to track email opens, log emails in your CRM automatically, and use templates in your inbox.



[How to uninstall](#)

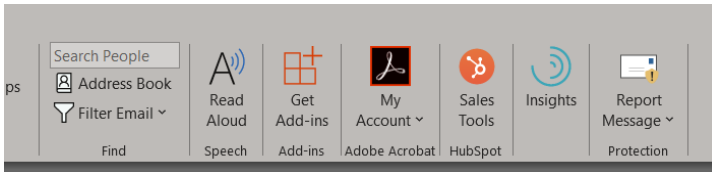
- This will take you to the *Microsoft AppSource*
- In the left sidebar, click **Get It Now**.



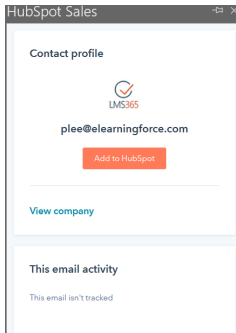
- In the dialog box, click **Continue**.



- You will be taken to your Office 365 account. Click **Add**.
- Once installation is complete, you will be redirected to a page indicating the add-in has been successfully installed. You can now access your contacts, documents, track, and log from your Outlook inbox.
- The HubSpot Icon will now appear on your Outlook ribbon. You might have to restart Outlook for it to appear.



- When you click on the icon you may be prompted to enter your HubSpot login credentials.
- When you have the icon open you can add contacts, track, and log emails.



- If you want to change any of the settings scroll to the bottom and click **More > Add-in settings**. From there you can manage the **Track and Log settings** and add emails to the **Never Log** list. (For example, add family email addresses if you use your SKG email address to email them, that way they **DO NOT** get logged) Emails on the **Never Log** will still get tracked if “track email” is selected, so uncheck it if you do not want to receive notifications.

