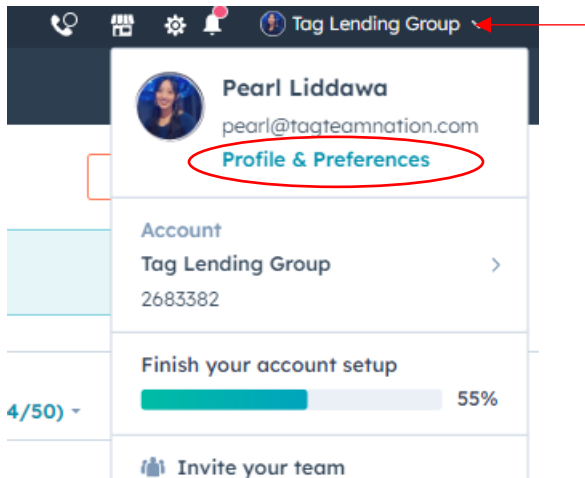


# HUBSPOT PROFILE GENERAL SETTINGS

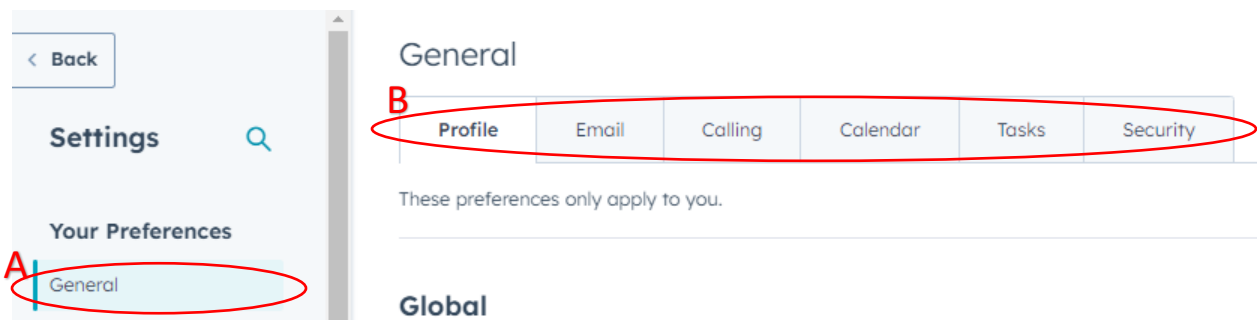
**STEP 1:** Use **Google Chrome** when logging in to HubSpot

- Before moving on to the following steps, open a new HubSpot window and create a **Meeting Link** in HubSpot. Please watch this [VIDEO](#) for a detailed step-by-step guide.

**STEP 2:** On the upper right corner, click your **PROFILE** and click on **Profile and preferences**



**STEP 3:** Click on **General** and fill out ALL the necessary information circled below



## B1: PROFILE

- Add a **profile picture**
- Fill in your First Name, Last Name, Language (**English**), Date and Time (**United States**), Phone Number (**Your Phone Number**), Defaults (**Contacts**)

## B2: EMAIL

- Make sure "**INBOX AUTOMATION**" is toggled **ON** and "**Install add-in**"

General

Profile **Email** Settings Calendar Tasks Security

These preferences only apply to you. For account level email management, go to [email logging settings](#).

**Email**

Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage any team emails, go to [inbox settings](#).

[Connect personal email](#)

EMAIL	STATUS	INBOX AUTOMATION
<b>pearltagteamnation@gmail.com</b> Inbox type: Gmail	Enabled	<input checked="" type="checkbox"/>
<b>marketing@taglendinggroup.com</b> Inbox type: Outlook 365	<a href="#">Install add-in</a> <a href="#">Disable</a> <a href="#">Remove</a> Enabled	<input checked="" type="checkbox"/>

A Pop-out will look like this. Make sure to click on **“OFFICE 365 EXTENSION”** and click **Download**

Download HubSpot Extensions

Review this matrix to choose the right HubSpot Sales Extension for you. Click 'I need help' to use our wizard to assist you on your selection.

	EXTENSION FOR GMAIL (CHROME)	OFFICE 365 EXTENSION	OUTLOOK DESKTOP EXTENSION
Email provider	Gmail or G Suite	Office 365	Any
Email client	Gmail / G Suite in Chrome	Outlook for Mac Outlook on the web Outlook.com	Outlook for Office 365 Outlook 2016 Outlook 2013 Outlook 2010
Operating system	Mac   PC	Mac   PC	PC
Download	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">Download</a>

[I need help](#)

Click on **“Get it Now”**

Microsoft | AppSource

All Apps Categories Industries Consulting Services Partners

Apps > **HubSpot Sales**


**HubSpot Sales**  
by HubSpot  
 Outlook  
★ 4.3 (1596 ratings)

Pricing Additional purchase may be required [Get it now](#)

Sign in with your **COMPANY EMAIL** account. *Sometimes it will skip this step*

## Sign in to Microsoft AppSource

Enter the email address of the account you want to use when acquiring apps on AppSource.

 If possible, use your work or school account. If you log in with a Microsoft account, apps that require a work or school account will not be available.

Work, school or Microsoft account

marketing@taglendinggroup.com

Sign in

Don't have an account? [Sign up for a free account](#)

Pop Out Confirmation and click **“Get it Now”**

Confirm your details to continue


×



HubSpot Sales  
By HubSpot

You're signed in as TLG Marketing (marketing@taglendinggroup.com).

[Edit your details](#)

 By clicking **Get it now**, I give Microsoft permission to use or share my account information so that the provider can contact me regarding this product. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

Get it now

Click **“Continue”**

## Would you like to install HubSpot Sales?

Continue

Cancel

It's set once you will see this

Apps > HubSpot Sales > Launch



HubSpot Sales  
HubSpot



Successfully added to your account  
marketing@taglendinggroup.com

Go back to HubSpot and Click "Done"



Download HubSpot Extensions

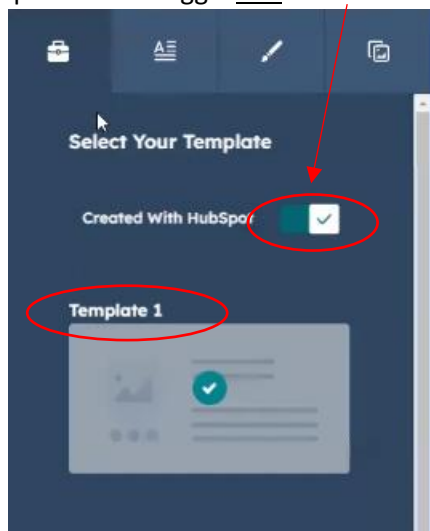
Review this matrix to choose the right HubSpot Sales Extension for you. Click 'I need help' to use our wizard to assist you on your selection.

	EXTENSION FOR GMAIL (CHROME)	OFFICE 365 EXTENSION	OUTLOOK DESKTOP EXTENSION
Email provider	Gmail or G Suite	Office 365	Any
Email client	Gmail / G Suite in Chrome	Outlook for Mac Outlook on the web Outlook.com	Outlook for Office 365 Outlook 2016 Outlook 2013 Outlook 2010
Operating system	Mac   PC	Mac   PC	PC
Download	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">Download</a>

[I need help](#)

Done

- Add your **Email Signature**. But before adding an email signature, you must create **one**.
  - o Open this [Email Generator](#)
  - o Use Template 1 and Toggle this Off



- Fill Out the following information accordingly

First Name  
Anthony

Last Name  
Angelillo

Job Title  
CEO / Founder - NMLS ID: 333322

Department  
Sales Staff

Company Name  
Tag Lending Group, LLC

Office Phone Number  
(305) 503-8655

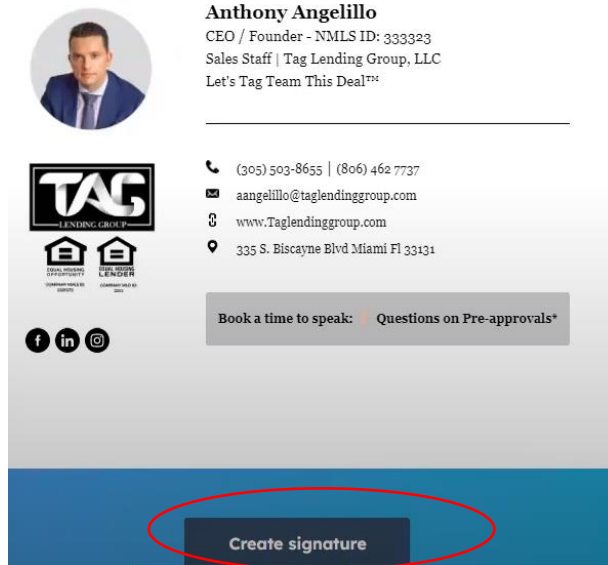
Mobile Phone Number  
(806) 462 7737

- You can copy the following Information below:
  - Website URL: [www.taglendinggroup.com](http://www.taglendinggroup.com)
  - Email Address: **Your company email address**
  - Address: **335 S Biscayne Blvd 2809 Miami, Fl 33131**
  - Add ALL applicable **Social Links**
  - Custom Field: **Let's Tag Team This Deal™**
- **Stylize your Signature TAB**
  - Theme, Text, and Link colors are all black "000000"
  - Font: **Georgia**
  - Font Size: **Medium**
- **Image TAB.** Copy and paste the following links below
  - **Profile Picture:** Get the link from your Marketing Assistant
  - **Company Logo:** <https://www.taglendinggroup.com/hubfs/SA%20EMAIL-SIGNATURE%20PIC/Company%20Logo.png>
  - **Custom CTA Copy:** Book a time to speak: 👉 Questions on Pre-approvals\*
  - **Custom CTA URL:** Insert the Consultation Meeting Link you created in HubSpot. Hover your mouse and copy the link as shown below.



- Select CTA Color: Type in **CACAC** to make the color **gray**
- Select CTA Text Color: **000000** to make it **Black**

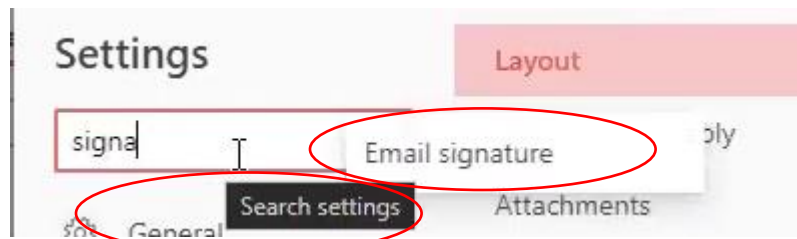
### ○ Create Signature



- A pop out question will ask How many are you in the company? Just type in 50. Then **Copy Signature**



- Go to your Outlook Settings and type **Email Signature** in your search bar then select Email Signature.



- Create signature. (1)Press enter Once and then (2)arrow up from your Keyboard. Then (3)Paste the signature you copied from the Email Generator. Then (4)press your arrow down ▼ from your keyboard

This is "Sales Staff" on your end

Put your mouse in here and press enter

- Edit this part



**Anthony Angelillo**

CEO/Founder - NMLS ID: 333323

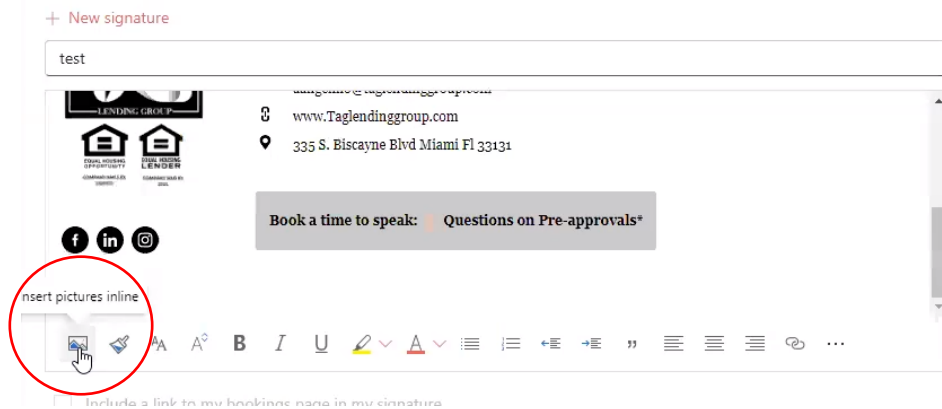
Executive Staff | Tag Lending Group, LLC

Wholesale Mortgage Lender

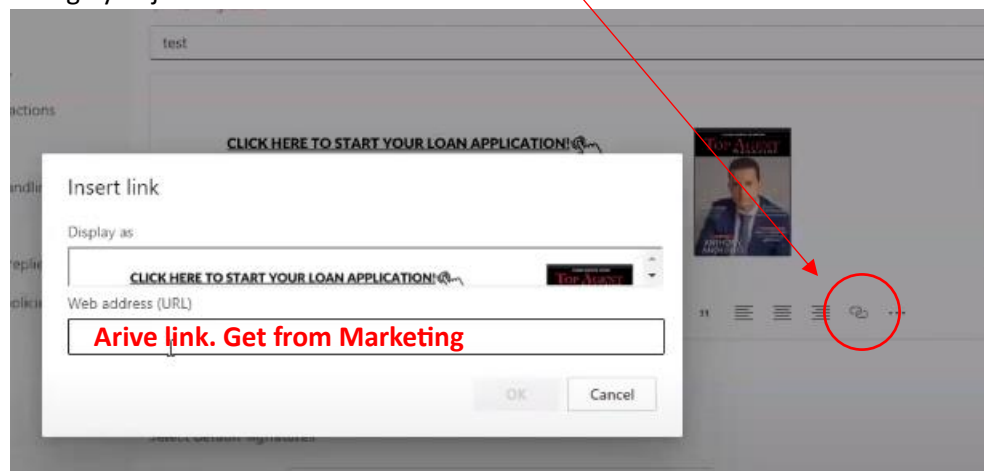
MLD:2311 | MBR:5234 | NMLS ID: 2329372

Let's Tag Team This Deal™

- Download this [IMAGE](#), and from your Outlook, Insert the picture inline(as shown below) and insert the image you just downloaded.



- Click the image you just inserted and insert link



- Click **SAVE**

- Go back to the Email Generator and edit this part.
  - Delete the information and links under **Custom CTA Copy** and **Custom CTA URL**



Find Out More

**Custom CTA URL**  
[www.hubspot.com](http://www.hubspot.com)

**Select CTA Color**  
 # CACACA

**Select CTA Text Color**  
 # 000000

OR

**Custom CTA Image**  
<https://example.com/images/my>

**Custom CTA URL**  
[www.hubspot.com](http://www.hubspot.com)


**DELETE**

**Insert links here**


- Add **Custom CTA Image** and **Custom CTA URL** using the links below
  - Custom CTA Image: <https://www.taglendinggroup.com/hubfs/SA%20EMAIL-SIGNATURE%20PIC/Email%20Signature%20Footer-1.png>
  - Custom CTA URL: **Arive link, get from Marketing Team**

- Create Email Signature and Copy the **Email Signature Source Code**

To: Your Recipient  
 Subject: Check out my new Email Signature



**Anthony Angelillo**  
 CEO / Founder - NMLS ID: 333323  
 Sales Staff | Tag Lending Group, LLC  
 Let's Tag Team This Deal™



**TAG**  
 LENDING GROUP

COMMUNITY LENDER

(305) 503-8655 | (806) 462-7737  
[aangelillo@taglendinggroup.com](mailto:aangelillo@taglendinggroup.com)  
[www.Taglendinggroup.com](http://www.Taglendinggroup.com)  
 335 S. Biscayne Blvd Miami FL 33131

Book a time to speak: Questions on Pre-approvals\*

Copy signature Copy signature source code Email to your colleagues




- Go back to HubSpot and **add** your Signature here

**Configure**

**Add email alias**  
An email alias allows emails sent outside of HubSpot to be associated with your user. [Learn more.](#)


**CURRENT EMAIL ALIASES:**

pearltagteamnation@gmail.com 

**Edit email signature**  
Your signature will be used in one-on-one emails through the HubSpot CRM and as a personalization token for marketing emails.

☐ **Include unsubscribe link** [Edit link text](#)  
Include a link at the bottom of your emails allowing recipients to unsubscribe. It will help you stay compliant with local spam laws and improve deliverability.


- o Make sure that when you **paste** your signature in **HTML** Tab and click **Save**

**Edit email signature** 

Signature Simple **HTML**

```
<table cellpadding="0" cellspacing="0" class="table__StyledTable-sc-1avdl6r-0 kAbRZI" style="vertical-align: -webkit-baseline-middle; font-size: small; font-family: Arial;"><tbody><tr><td><table cellpadding="0" cellspacing="0" class="table__StyledTable-sc-1avdl6r-0 kAbRZI" style="vertical-align: -webkit-baseline-middle; font-size: small; font-family: Arial;"><tbody><tr><td style="vertical-align: top;"><table cellpadding="0" cellspacing="0" class="table__StyledTable-sc-1avdl6r-0 kAbRZI" style="vertical-align: -webkit-baseline-middle; font-size: small; font-family: Arial;"><tbody><tr><td class="template1__ImageContainer-sc-nmby7a-0 gjVAKI" style="text-align: center;"></td><td><b>Pearl Liddawa</b><br>Head Marketing Manager<br>Tag Team Nation & Tag Lending Group, LLC</td></tr></tbody></table></td></tr></tbody></table>
```

**Preview**

 **Pearl Liddawa**  
Head Marketing Manager  
Tag Team Nation & Tag Lending Group, LLC

Your signature will be used in one-on-one emails throughout the HubSpot CRM.

**Save** **Cancel**

- Make sure these **4 Notifications** are checked

## Sales Notifications

### Notifications

● Notifications are on.

[Manage notifications](#) 

### Browser Notifications

Choose what you get notified about.

- ☒ Email opens
- ☒ Email clicks
- ☒ Document views
- ☒ Lead revisits
- ☐ Prospect revisits

### B3: CALLING

- Add the **Company Phone number** (as seen below) AND your phone number. Add your working hours. Ensure that Ring Preference is **“Forward to Phone Number,”** and add your phone number under **“Missing forwarding Number.”** Code will be sent to you(SMS or Call).

**HubSpot calling**  
Connect an outbound phone number to log, track, and make calls in HubSpot.

**A** [Add phone number](#)

**B**

**My working hours**  
Set the time when you want calls to be routed to you. You can use this to define routing in your phone number :

You haven't defined your working hours yet. Calls can be routed to you any time of day.

**C** [Add hours](#)

**Inbound calling preferences**  
Set how you want to receive inbound calls to your HubSpot phone numbers.

**D** Ring preference:   [Add](#)

You haven't set up a forwarding phone number. This means that incoming calls can't be forwarded and won't c

### B4: CALENDAR

- Go to your Outlook and create a **Calendar**. Name it **“HS Tasks.”** Add it to your Calendar

January 2024

**Add calendar**

**Create blank calendar**

**HS Tasks**

**Add to**

[Save](#) [Discard](#)

- Go back to **HubSpot Settings**. Make sure your Outlook Calendar is sync. Sync the calendar you just created under Tasks Calendar Sync. Also, make sure to add **ALL** your calendars under **Availability Calendar**.

**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.](#)

[Disconnect task calendar](#)

☒ **Meeting Scheduling Pages**  
A personal scheduling page that allows contacts to book available times directly to your account primary calendar.

**Availability Calendars**  
Select which calendars you want to use to determine your availability for bookings

- Then Go back to HubSpot Settings under the **Meetings** Tab
  - o **Meetings URL** will be just your First-Lastname
  - o **Meeting Domain** is taglendinggroup.com
  - o **Default Meeting Link**: this would look like “Consultation with Firstname Lastname.” Shown below
  - o Turn On **Scheduling Pages**, Include a link and add **Chant meeting Link**

**Meetings**  
Customize your HubSpot Meetings URL and domain.

**Meetings URL**  
Your new meetings URL will only apply to future meetings and won't affect links created before.

lending.tagteamnation.com/meetings/ saima-khimani

**Meeting domain**  
Previously sent links are still accessible from their old locations.

taglendinggroup.com

**Default meeting link**  
The default meeting link is used for personalization tokens and can't be deleted.

Consultation with Saima Khimani

**Scheduling pages**  
You can turn off this feature, which will disable all scheduling pages owned by your user.

Turn off

**Chat Profile**

☒ Include a link to your meetings booking page in the messages chat window

**Chat Meeting Link**

Consultation with Saima Khimani

## B5: TASKS

- Check Default below and use it on your end as well. You can add your reminders as well.

**Defaults**  
Set preferences for task creation.

**Due date** Today

**Due time** 8:00 AM

**Reminder** 30 minutes before

**Follow-up tasks**  
Set preferences for follow-up reminders.

☒ Get prompted to create a follow up task every time you complete a task from a list view

## B5: SECURITY

- Check the Default below and use it on your end as well.
  - o Add a **Trusted Phone Number**. You can use your Phone number or the Company Phone Number
  - o Make sure to add **Two factor Authentication**

### Password

[Reset password](#)

Last reset on 1/29/2021

### Trusted Phone Number

+1 (305) 503-8655

[Change trusted phone number](#)

[Delete trusted phone number](#)

### Two-factor authentication

[Remove SMS](#)

Primary method

[Remove Security App](#)

Secondary method

[View backup codes](#)

10 codes remaining

### Session Reset

[Log Out of All Sessions](#)

This will log you out of all devices and sessions, including this active one.

### Remove from this account

This action will remove your user from this account. If you're part of other accounts, you'll still have access to them.

[Remove me from this account](#)

### Permanently Remove

[Delete my user account](#)

\*If you are still confused about the Step-by-Step guide above, watch this [Video](#).

**CONGRATULATIONS!**  
**YOU ARE ONE STEP AHEAD**