

HubSpot

X Microsoft Teams: Notification Guide

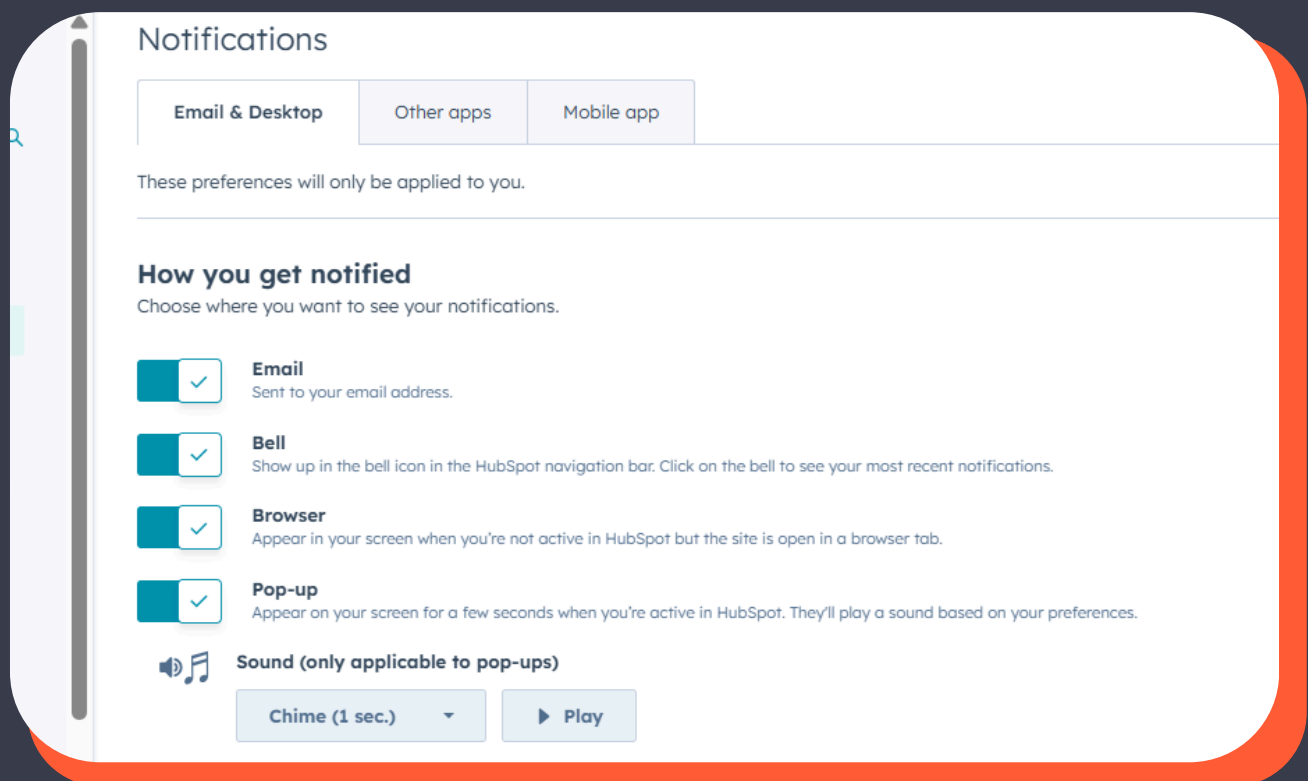


Introduction

Now that HubSpot has been successfully integrated with **Microsoft Teams**, this guide will help you fine-tune your notifications so you're only alerted to what truly matters. Whether you're in *sales, marketing, or operations*, the goal is to streamline your workflow and reduce unnecessary noise.

You'll learn:

- ✓ How to connect your HubSpot account to Teams
- ✓ Recommended notification settings by role
- ✓ How to manage and adjust notifications
- ✓ Handy tips for making the most of the integration



1. Connecting Your Account (if you haven't already)

If you've received a Teams message asking you to connect HubSpot but haven't done it yet, follow these steps:

01

Click the "Connect" Button

You'll find this in the prompt message sent within Microsoft Teams.

02

Log Into HubSpot

Use your usual login credentials when prompted.

03

That's It!

You're now connected and ready to manage your notifications.

2. Recommended Notification Settings by Role

The integration lets you customise alerts based on your job function. Here are our recommended defaults:

You can adjust these any time in **HubSpot** → **Profile & Preferences** → **Notifications** → **Microsoft Teams**.



SALES & BUSINESS DEVELOPMENT

Enable:

- Mentions and comments
- Assigned tasks
- Deal stage changes
- Workflow alerts (for lead or deal handovers)

Optional:

- Email opens/clicks (especially if you're prospecting)



MARKETING

Enable:

- Mentions and comments
- Form submissions (if managing lead generation)

3. *How to Adjust Notification Preferences*

01

Log in to HubSpot.

02

Click your profile photo (top right corner)
→ **Profile & Preferences.**

03

Select **Notifications** from the left-hand menu.

04

Click the **Other apps** tab.

05

Use the toggles to turn notifications on or off based on what you want to receive. *Changes take effect immediately and only apply to your personal account.*

4: Understanding Notification Channels

HubSpot gives you flexibility in how you receive alerts.

Here's what each option means:

- **Email** →
 - Sends a notification to your inbox.
- **Bell Icon** →
 - Displays alerts in the HubSpot navigation bar.
- **Browser** →
 - Notifications pop up in your browser when HubSpot is open but not in focus.
- **Pop-Up** →
 - Brief, on-screen alerts that appear while actively using HubSpot.

You can manage these under:

HubSpot → **Profile & Preferences** → **Notifications** → **Email & Desktop**

(As shown in the image on page 2)

Pro Tips



Don't be afraid to mute non-critical alerts to keep Teams clean and focused.



Use @mentions in HubSpot notes/comments to trigger Teams alerts for specific team members.



Pin important channels in Teams - if you're routing HubSpot alerts to specific channels, pin them to the top of your Teams sidebar so you don't miss anything crucial.

Need Support? Contact Us

If you're unsure which settings are best for your role or need assistance tweaking your preferences, we're here to help.

Email:

hello@unmatched.agency