HubSpot

June 2026
Product Updates.

Feature name

The feature description gives you a quick, clear overview of what the product update is and why it matters. It explains the purpose of the product update and what it allows you to do in HubSpot.

Feature Description

- This is intended to show why the product update is valuable and what positive impact you can expect from it.

Benefits

Product Availability

Tier Availability

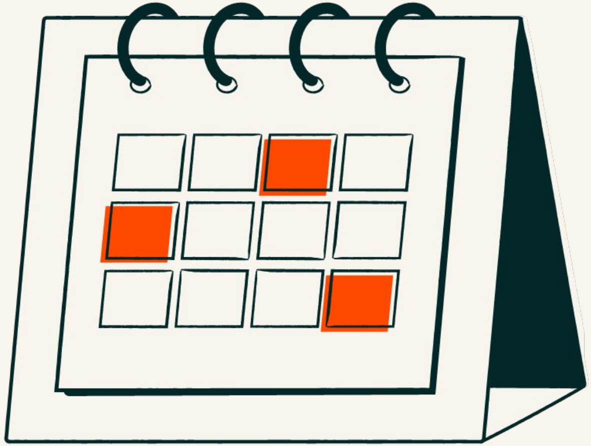
Public Beta or Live

Marketing Hub Starter+ Professional+ Enterprise+ **Live**

Launch region: Global

Where is the feature available?

Table of Contents



What's New for Marketers

HubSpot

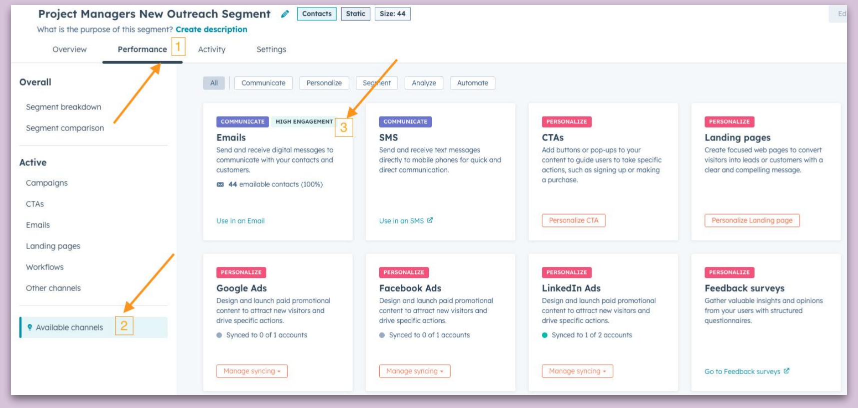
Predict Email Engagement Before Sending

AI now predicts how a segment of contacts will perform in an email based on their historical engagement, letting you focus on high-potential segments before you send.

- See a High, Medium, Low, or Unknown engagement prediction on any Contact segment in the Overview or Performance tab.
- Predictions compare contacts' past engagement against the average for all contacts in your HubSpot instance.
- Focus sends on high-predicted segments to improve overall campaign results.

All Products | All Plans | Live

Launch region: Global



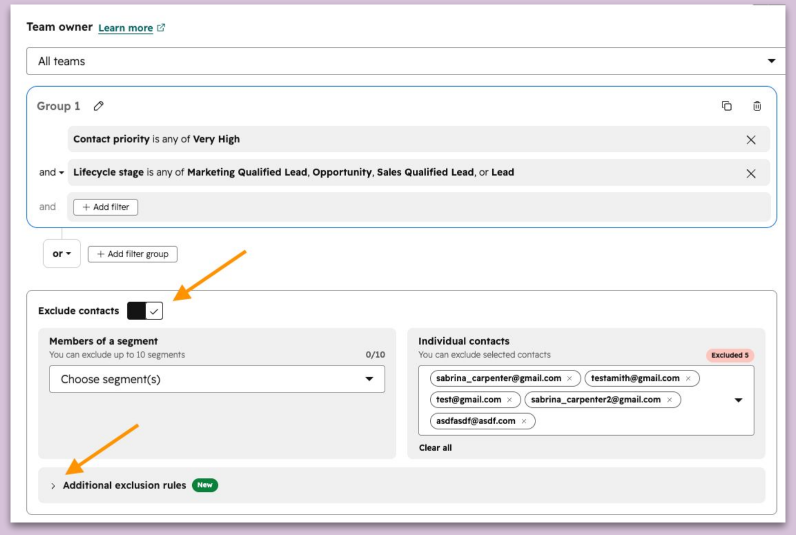
Smarter Exclusion Controls in Segments

Segment exclusions now include built-in smart toggles for common scenarios like unsubscribed contacts, non-marketing contacts, and specific email domains, and you can exclude more than 25 individual contacts.

- Apply built-in exclusion toggles for unsubscribed contacts, non-marketing contacts, and specific email domains in the segment editor.
- Exclude more than 25 individual contacts from a segment, removing the previous per-segment limit.

All Products | All Plans | Live

Launch region: Global



Use Custom Brand Fonts in Marketing Email

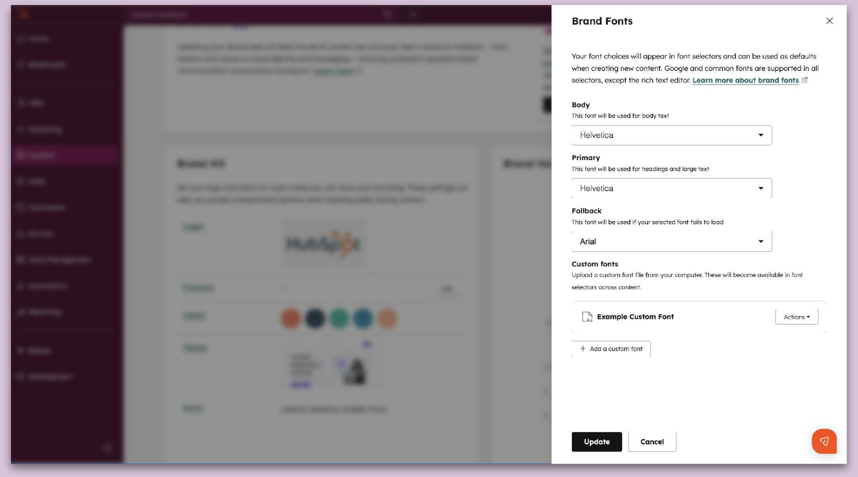
Custom fonts from your Brand Kit now appear in the font selector of the drag-and-drop Marketing Email editor, so you can apply your brand's fonts without custom coding.

- Add custom fonts in Content > Brand > Brand Overview, then find them automatically in all font dropdowns in the email editor.
- Choose a fallback font for email clients that don't support custom fonts.
- Custom fonts display in Apple Mail; Gmail, Outlook, and Yahoo show the fallback font instead.

Note: Google Font support coming soon.

All Products | All Plans | Live

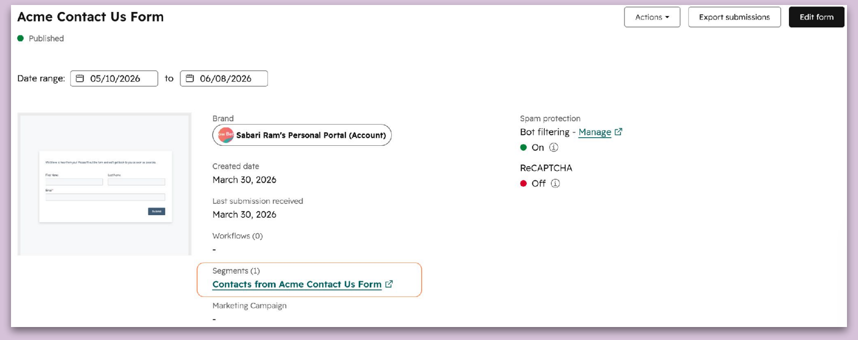
Launch region: Global



See Segments Associated With Your Forms

Form Details now shows all associated Segments (Lists) alongside existing Workflows and Campaigns, giving you a complete view of dependencies before managing or migrating forms.

- View all associated Segments (Lists) directly under Form Details without leaving the page.
- Works for all forms, including legacy forms being migrated to the new format.



All Products | All Plans | Live

Launch region: Global

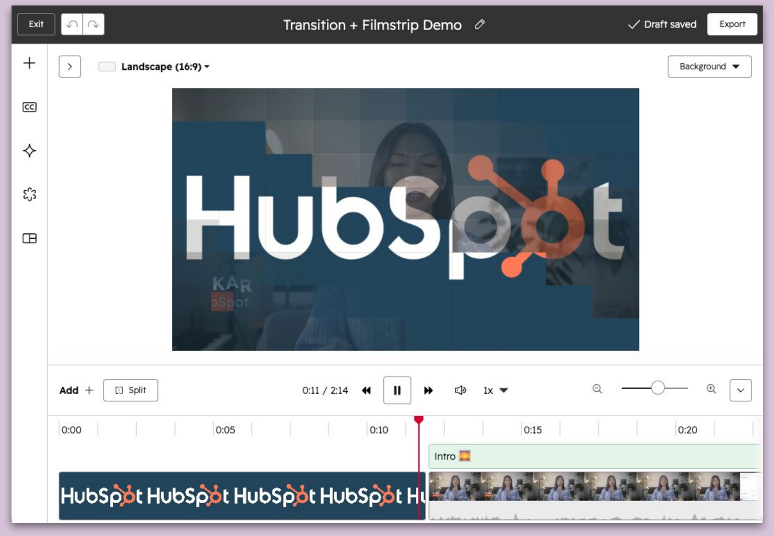
Add Transitions to Videos in the HubSpot Editor

Animated transitions between video clips, images, and overlay elements are now available in HubSpot's video editor, replacing abrupt cuts with fade, slide, wipe, clock wipe, or flip effects.

- Add a transition between adjacent clips by hovering between them and selecting an effect and duration (0-5 seconds).
- Set independent start and end transitions for text or image overlay elements using the overlay track controls.
- Edit or remove any transition by clicking the transition button to choose a new style or select None.

Marketing Hub | Content Hub | Professional+ | Live

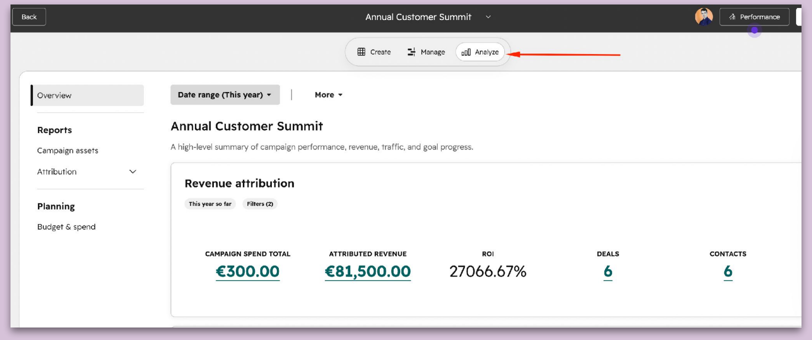
Launch region: Global



Campaign Analytics Now Inside Marketing Studio

A new Analyze tab in Marketing Studio brings campaign performance metrics directly into your workspace, so you can move between planning, building, and reviewing results without switching sections.

- Access the same reports as the Performance section, plus additional improvements, from the Analyze tab inside Studio.
- The separate Performance section remains available with the same campaign performance metrics.



Marketing Hub | Professional+ | Live

Launch region: Global

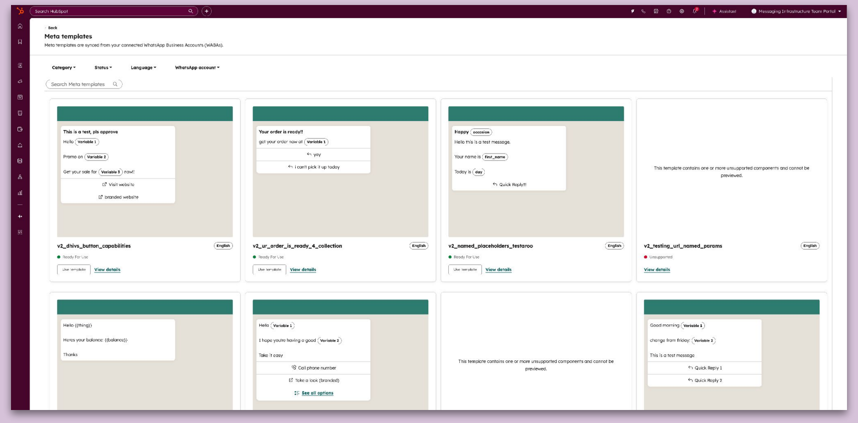
Dedicated WhatsApp Home in HubSpot

WhatsApp now has its own dedicated Home in HubSpot alongside other core messaging channels, with a redesigned template management experience and a comprehensive reporting suite.

- Manage all WhatsApp templates from one place, with status visibility and filtering by message type, team, WABA, and status.
- Access delivery, engagement, clicks, over-time comparisons, opt-out rates, and messaging error details in the new reporting suite.

Marketing Hub | Service Hub | Professional+ | Live

Launch region: Global



Contextual Activation Emails for Payments Merchants

Merchants approved for HubSpot Payments now receive personalized activation emails based on their most recent HubSpot activity, replacing generic follow-up with context-aware outreach to guide their first payment.

- Approved merchants receive a contextual approval email tailored to their last HubSpot activity.
- If still inactive after seven days, a 0% fees reminder email is sent automatically.
- Emails are automatically suppressed once the merchant activates.

All Products | All Plans | Live

Launch region: Global

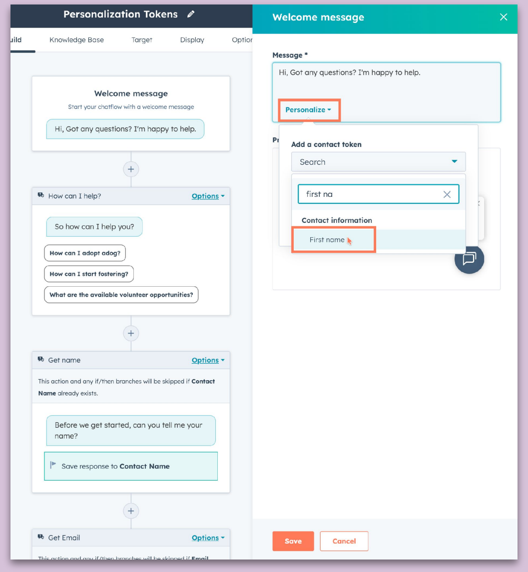
Personalize Chatflow Welcome Messages with CRM Data

You can now insert CRM personalization tokens like first name or company name directly into your live chat bot's welcome message, so recognized visitors receive a tailored greeting from the first touchpoint.

- Add tokens like first name or company name to the welcome message, with fallback default values for unrecognized visitors.
- Preview the welcome message with default values and test it with sample values before publishing.
- Configure personalization in any existing rules-based chatflow by editing the welcome message and clicking Personalize.

All Products | All Plans | Live

Launch region: Global



Customize Your Analyze Tab

Replace the default Analyze tab dashboard with your own across tools including Website Pages, Landing Pages, Blog, Social, Forms, Help Desk, and Sales Workspace, keeping your reporting and workflow in the same place.

- Switch to a different dashboard using the dropdown at the top of the Analyze tab, or add one using Add and manage dashboards.
- Click any report to adjust the chart type, properties, and filters without leaving the tab.
- Drag reports to rearrange the layout — all changes autosave as you edit.

All Products | Professional+ | Live

Launch region: Global

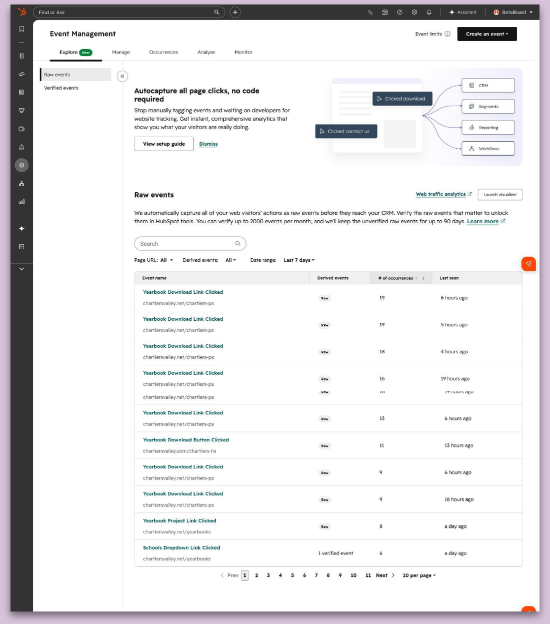
AutoCapture Website Events

AutoCapture automatically tracks clicks on buttons, links, and interactive elements across your website from the moment your HubSpot tracking code is active, with no additional code needed.

- Review all captured interactions in Event Management, including element names, URLs, and occurrence counts.
- Verify events using the visual editor, then use them in lists, workflows, lead scoring, and reporting.
- AutoCapture backfills up to 90 days of historical data so you're not starting from zero.

All Products | Enterprise+ | Live

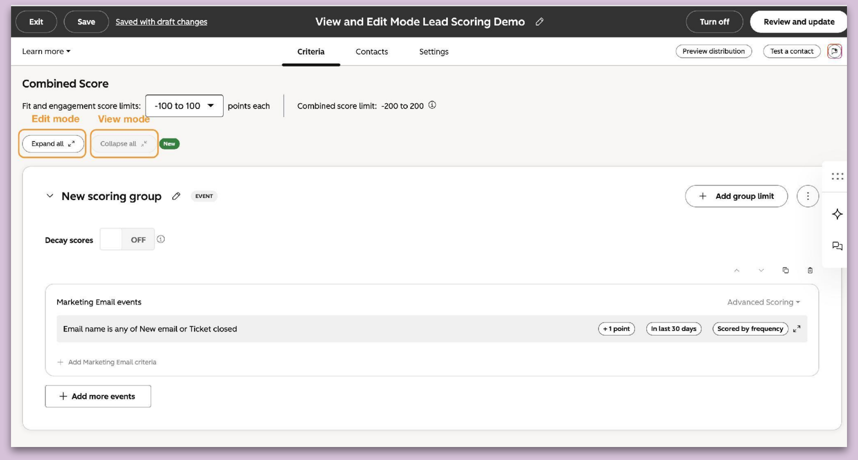
Launch region: Global



View and Edit Modes for Scoring Rules

Lead Scoring now has a View mode that collapses scoring rules into a readable summary, making it easier to review complex logic without navigating the full editor.

- Switch between View mode (collapsed, plain-language summary) and Edit mode while working on a lead score.
- Expand or collapse individual rules independently, keeping other rules in the opposite mode.
- View mode shows each rule's logic, points assigned, timeframe, and scored-by-frequency settings.



Marketing Hub | Sales Hub | Smart CRM | Professional+ | Live

Launch region: Global

What’s New for

Sellers

HubSpot

Report on Line Items Alongside Goals

Line Items can now be joined to Goals in Datasets and visualized in the Custom Report Builder, closing the gap for teams that measure revenue at the line item level.

- Build datasets that join Goals with associated Line Items, then use custom formula columns to calculate metrics against a single Goal target.
- No new configuration is required; Line Items appear as a join option wherever Goals are used in Datasets.
- Enables more granular, accurate forecasting for teams that track revenue at the line item level.

Sales Hub | Professional+ | Live

Launch region: Global

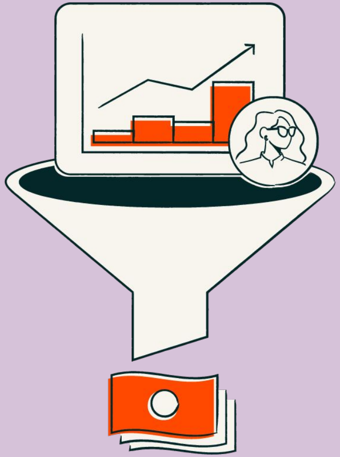
Streamlined Goal Creation and Editing

A redesigned goal creation flow and optimized targets table make setting and tracking goals faster, with unique name validation, data retention on back-navigation, and bulk assignee addition.

- Goal names are validated for uniqueness, and you're routed to a pre-filtered Goals Overview tab after saving.
- Add multiple assignees at once, and target values are preserved when teams or users are updated.
- Bulk actions appear above the table only when rows are selected, reducing clutter in the interface.

Sales Hub | Service Hub | Professional+ | Live

Launch region: Global



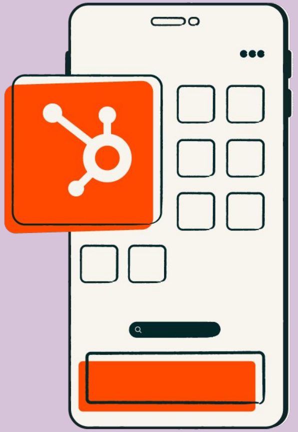
Mobile Board View Matches Desktop

The mobile board view for Deals, Tickets, and Custom Objects now reflects the same properties, saved views, and filters you configured on desktop, so your pipeline looks the same wherever you access it.

- Board cards display up to 20 properties from your desktop record card settings.
- Filters and sorting follow your desktop saved views, resetting to their defaults when you close or log out.
- Update what you see on mobile by adjusting your desktop table view in Settings > Objects.

All Products | All Plans | Live

Launch region: Global



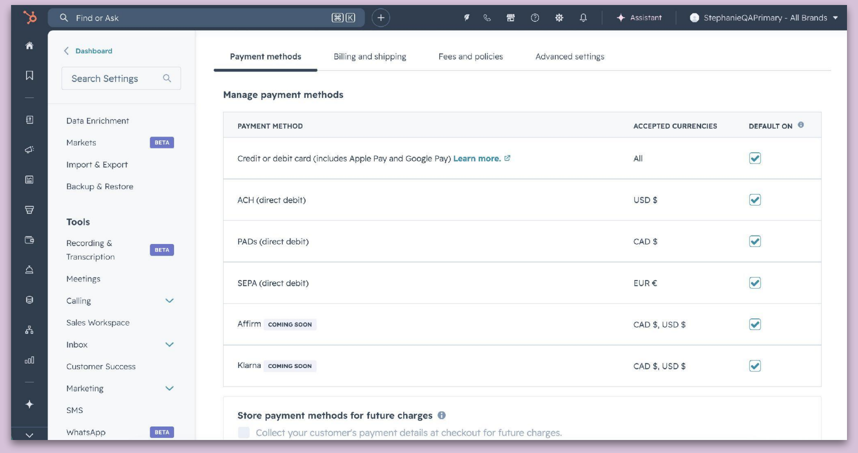
Accept Installment Payments with Klarna and Affirm

Buyers can now pay in installments using Affirm or Klarna at HubSpot checkout while you receive the full payment upfront, reducing friction on high-value orders.

- Manage Klarna and Affirm in Payments settings; they appear automatically if your business qualifies and can be turned off.
- A 5.99% processing fee applies to Affirm and Klarna transactions, plus a 0.5% or 0.75% platform fee based on your payment processor.
- Flexible payment options help increase customer confidence and reduce cart abandonment on larger purchases.

All Products | All Plans | Live

Launch region: Global



New Intent Signals for Deal Intelligence

Two new AI-powered intent signals, Key Stakeholder Identified and Pain Point Mention, automatically extract decision-maker roles and business challenges from deal conversations and surface them as structured CRM data.

- Key Stakeholder Identified fires when a decision maker, champion, economic buyer, or influencer is recognized in emails, notes, or call transcripts.
- Pain Point Mention captures stated business challenges across 8 categories, mapped to the associated company record.
- Both signals are eligible for Workflows, Scoring, and List Segmentation, enabling precise downstream automation.

Sales Hub | Professional+ | Live | Requires Credits

Launch region: Global

Custom Signals in Buyer Intent

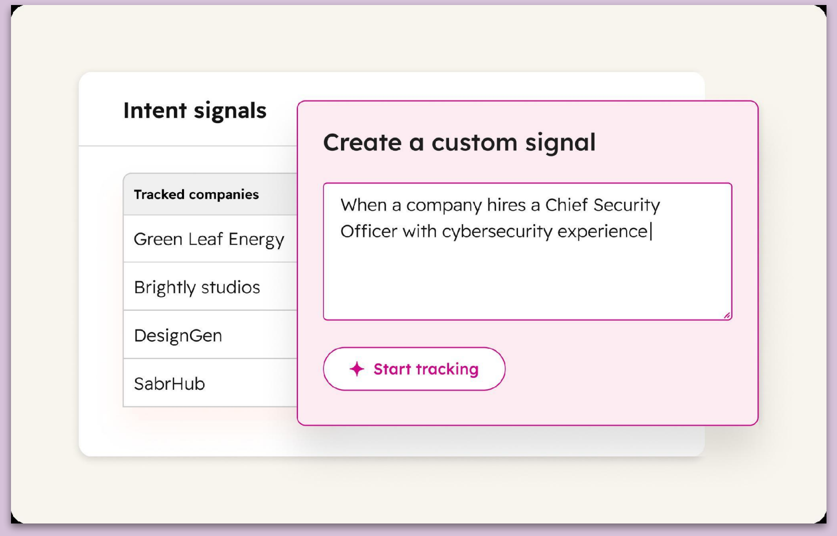
You can now create custom buyer intent signals using plain language, tracking niche-specific triggers and surfacing matching companies with cited sources for use in segments, workflows, and lead scoring.

- Describe any buying trigger in plain language — HubSpot surfaces matching companies with full source citations.
- Preview auto-generated matching companies before activating a signal to validate it fits your criteria.
- Use custom signals in segments, workflows, lead scoring, and reporting, just like standard signals.

Note: Requires HubSpot Credits.

All Products | All Plans | Live

Launch region: Global



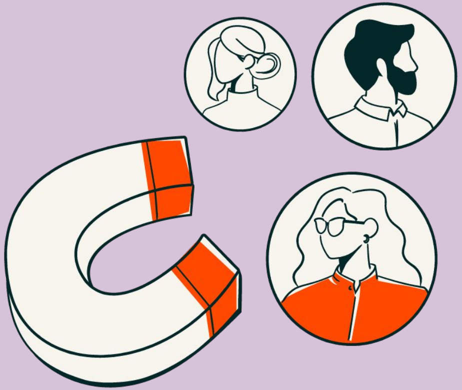
Prospecting Agent Now on All Paid Hubs

Prospecting Agent is now available to every paid HubSpot customer regardless of which hub they're on, removing the previous requirement to hold a Sales Hub subscription.

- Any portal on Starter, Professional, or Enterprise can enable Prospecting Agent without a Sales Hub subscription.
- User-level access is controlled through permissions, so admins decide who can configure and use the agent.
- Teams in marketing, customer success, and operations can now use Prospecting Agent wherever prospecting happens.

All Products | Starter+ | Live

Launch region: Global



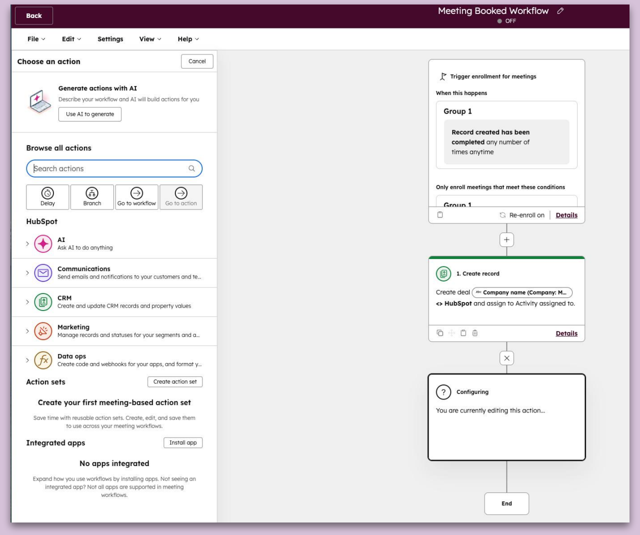
Meetings in Workflows

Meeting records and properties are now available as triggers and data sources in workflows, enabling automations based on when meetings are booked or updated.

- Trigger a workflow when a meeting is created, using criteria like meeting type, owner, or associated contact.
- Add actions that fire based on meeting events, such as auto-creating a deal when a demo is booked.
- Combine meeting data with associated object data to build multi-step automations across contacts and companies.

All Products | Professional+ | Live

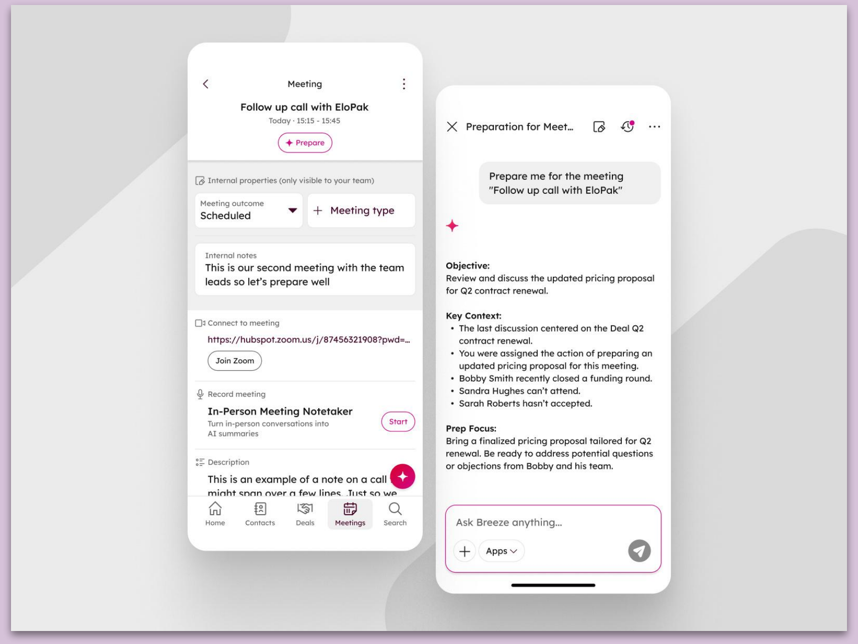
Launch region: Global



AI-Powered Meeting Prep on Mobile

The redesigned Meeting Detail Page on mobile consolidates attendees, conference links, linked deals, and internal notes in one place, with a new Breeze-powered Prep tab that generates an AI briefing on demand.

- View meeting info, attendees, conference join button, directions, and linked deals from a single screen.
- Tap Prep to get a Breeze briefing covering recent calls, emails, deal stage, open tasks, and decision-maker context.
- Edit meeting fields directly from the detail page without navigating to the CRM record.



All Products | All Plans | Live

Launch region: Global

Manually Retry Failed Card Payments

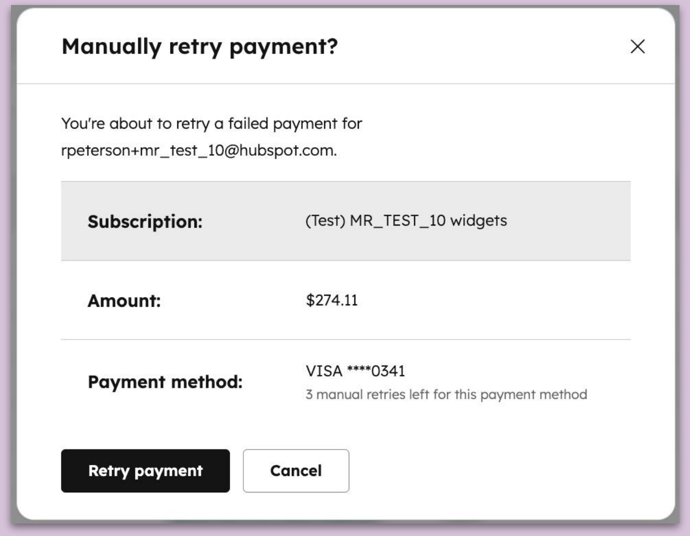
When a subscription card payment fails, you can now retry it immediately from Commerce > Payments instead of waiting for automated retries or asking buyers to update their payment details.

- Open a failed payment's details and click Actions > Manually retry payment to recover revenue right away.
- Some payments can't be retried based on the decline reason; others may already be scheduled for automatic retry.
- You can manually retry the same payment up to 3 times.

Note: Requires Revenue Hub with payments enabled.

Revenue Hub | All Plans | Live

Launch region: Global



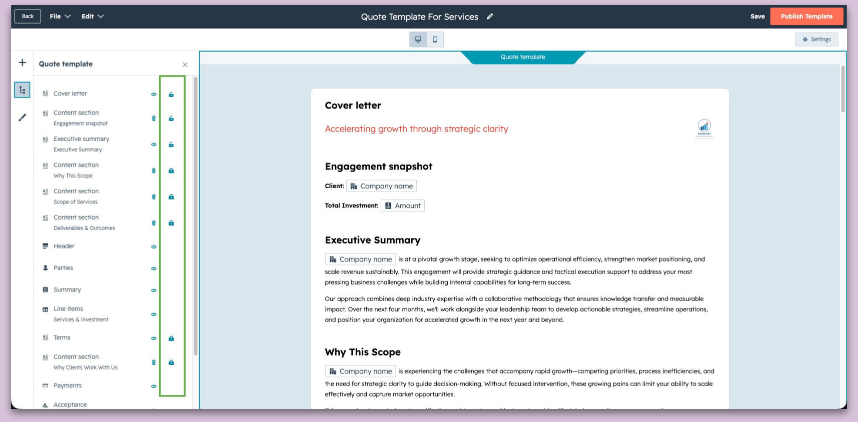
Lock and Hide Modules in Quote Templates

Admins can now lock or hide specific modules within quote templates, preventing reps from editing legal terms, pricing details, or approved messaging when creating individual quotes.

- Lock a module so reps can't edit it, or hide it so it doesn't appear in the final quote at all.
- Supported modules include rich text sections (Cover Letter, Executive Summary, Terms & Conditions), Writer sections, and custom-coded modules.
- Reps clearly see which sections are locked when creating a quote and can't make changes to that content.

Revenue Hub | Professional+ | Live

Launch region: Global



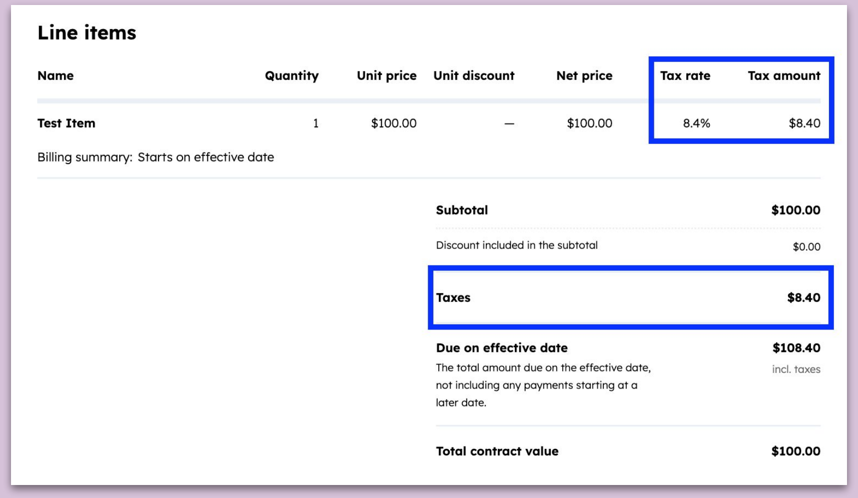
Automated Sales Tax Calculation for Quotes

Sales tax is now calculated automatically in real time on quotes based on line item tax categories and the buyer's address, eliminating manual tax entry and reducing errors in the quote-to-cash process.

- Enable automated sales tax in Settings > Revenue > Tax without enrolling in HubSpot payments or Stripe payments.
- Tax calculates in real time once a billing address and line items with assigned tax categories are added to the quote.
- The quote editor shows payments applied, updated total, and updated balance due as you make changes.

Revenue Hub | Professional+ | Live

Launch region: Global



Edit Paid Invoices

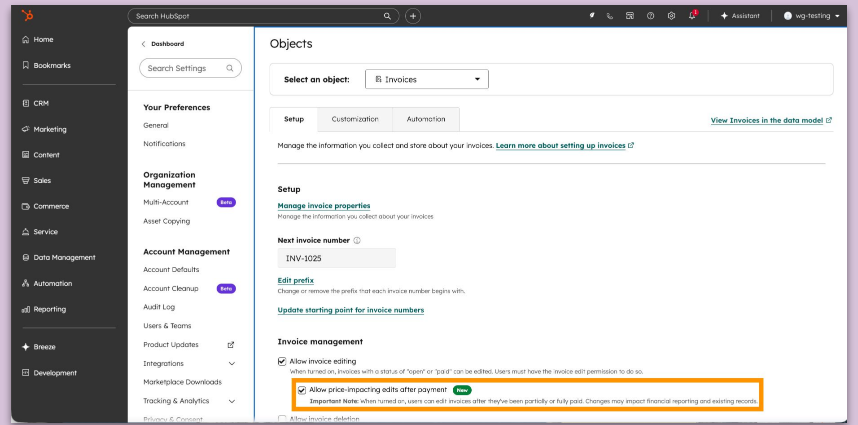
You can now edit line items and balance-changing properties on paid or partially paid one-time invoices, with HubSpot recalculating the balance due and invoice status automatically after each change.

- Enable price-impacting edits in invoice settings, then open a paid invoice and select Edit to update line items.
- The invoice editor shows payments applied, updated total, and updated balance due in real time as you make changes.
- If an edit creates an outstanding balance, the customer can complete payment through the existing Pay Now flow.

Note: Edits that create a negative balance are not permitted. Not supported for invoices with Automated Sales Tax enabled.

Revenue Hub | Professional+ | Live

Launch region: Global



HubSpot Capital Financing for Payments Customers

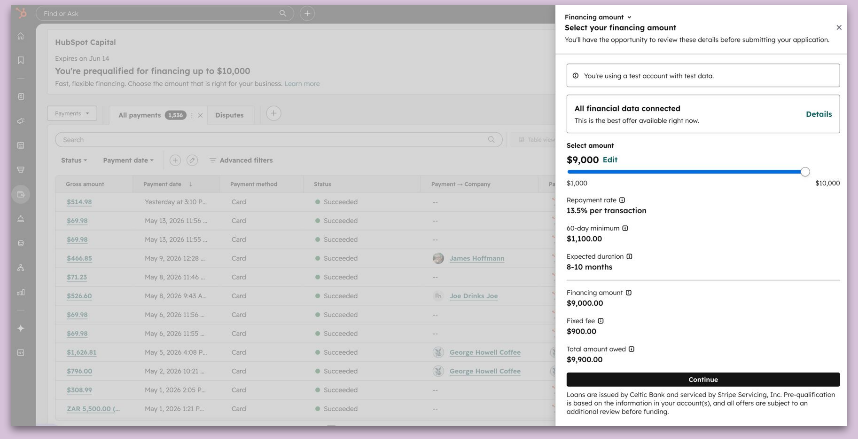
Revenue Hub customers processing payments via HubSpot Payments or Stripe in the US and UK can now apply for working capital financing directly in HubSpot, pre-qualified based on payment history.

- Pre-qualified customers see a notification in Commerce > Payments and can review and adjust their offer using a slider.
- Approved funds are disbursed within 1-2 business days to your connected bank account.
- Manage financing and view payment status from Payments Account > Financing.

Note: Available for US and UK customers using HubSpot Payments or Stripe payment processing.

Revenue Hub | All Plans | Live

Launch region: Global



What's New for
Support & Success

HubSpot

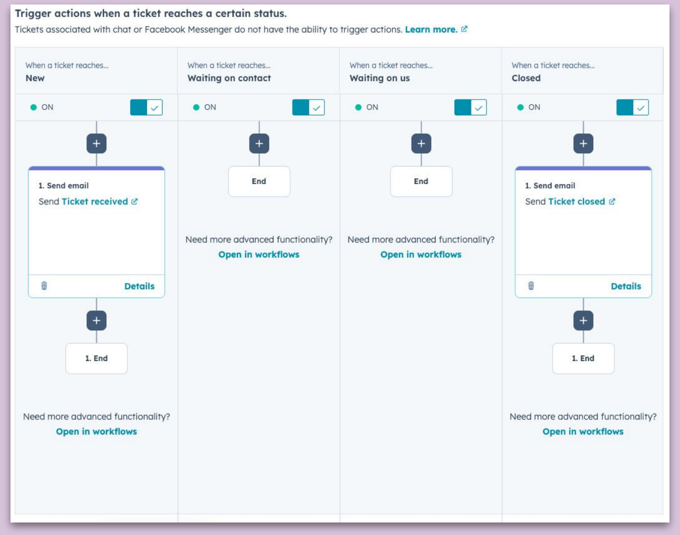
Redesigned Editor for Ticket Automation Emails

You can now use HubSpot's drag-and-drop Marketing Email Editor to design your Ticket Received and Ticket Closed messages without needing a Marketing Hub subscription.

- Access the editor from Settings > Objects > Tickets > Pipelines > Automate, then click a message name in the Send action.
- Use drag-and-drop modules, responsive design, and branding controls to create professional-looking branded emails.
- Gives Service Hub users the same design tools previously only available in Marketing Hub.

Service Hub | All Plans | Live

Launch region: Global



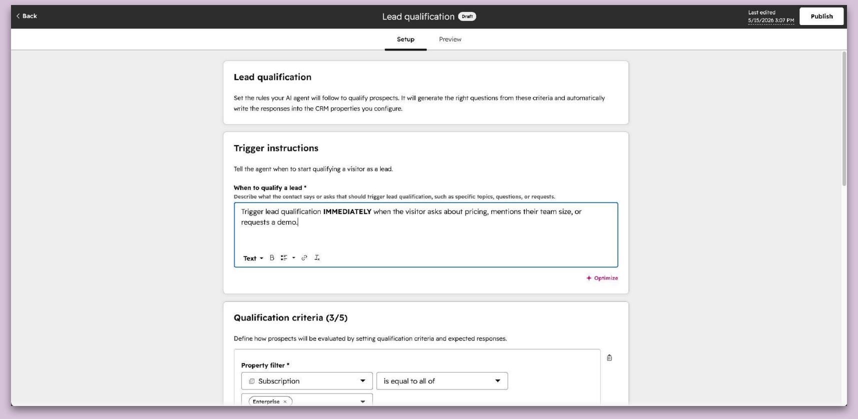
Set Custom Lead Qualification Triggers

You can now write custom trigger instructions that define exactly when Customer Agent initiates lead qualification, replacing the previous opaque defaults with rules based on your business context.

- Write trigger instructions in plain language, such as "Trigger when the visitor asks about pricing or requests a demo."
- Configure triggers in Customer Agent > Train > Actions > Lead Qualification > Trigger Instructions.
- Test your triggers in the built-in Tester to verify they fire correctly before publishing.

All Products | Professional+ | Live | Requires Credits

Launch region: Global



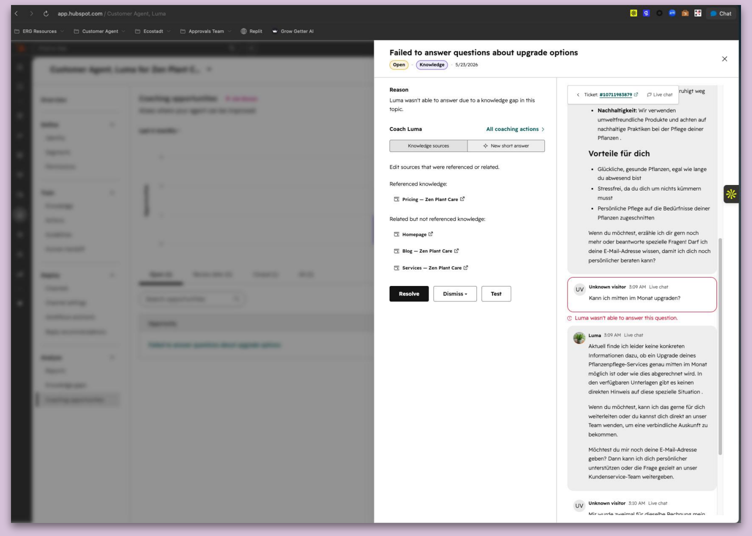
Coaching Opportunities for Customer Agent

A new Coaching Opportunities page automatically surfaces patterns in unresolved conversations, escalations, and negative feedback, giving you a prioritized list of areas where your agent needs improvement.

- Each opportunity links to the conversations where the issue was detected, showing exactly where the agent fell short.
- Coach the agent, test changes, and mark an opportunity as resolved or dismiss it to revisit later.
- Coaching Opportunities replaces the standalone Knowledge Gaps view and will expand to include more signal types over time.

All Products | Professional+ | Live | Requires Credits

Launch region: Global



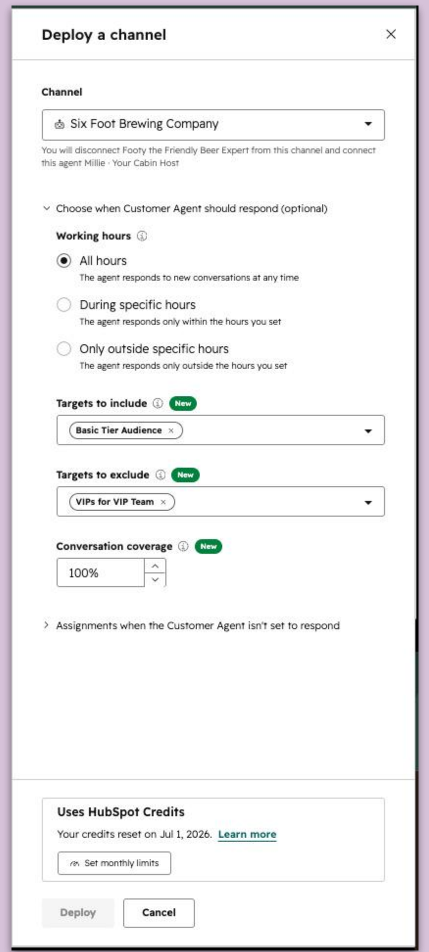
Target Who Customer Agent Responds To

Admins can now define which contacts Customer Agent responds to on email by selecting HubSpot Lists or contact property filters, with excluded contacts routed to the human queue.

- Select active lists, static lists, or contact property filters in the Customer Agent email channel deployment settings.
- Contacts not matching the targeting criteria are routed to the human queue or receive no automated response.
- Targeting is evaluated at ticket creation using HubSpot's existing Lists and filters infrastructure.

All Products | All Plans | Live

Launch region: Global



Organize Help Desk Views with Folders

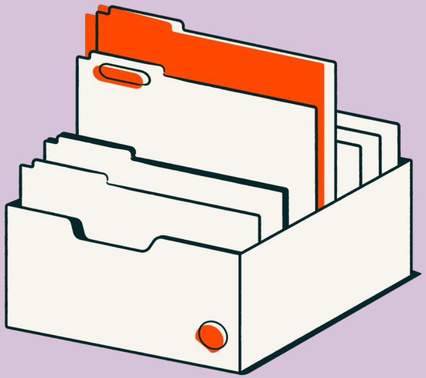
You can now group related Help Desk views into named folders in the sidebar, keeping your views organized and easier to navigate as your team creates more of them.

- Create a folder from the + button in the Views sidebar, then drag and drop any view into it.
- Rename, reorder, collapse, or delete folders at any time. Your views are preserved if a folder is deleted.
- Existing views in the More/Less section are automatically moved into a new Other folder.

Note: Requires a Service Seat.

Service Hub | Professional+ | Live

Launch region: Global



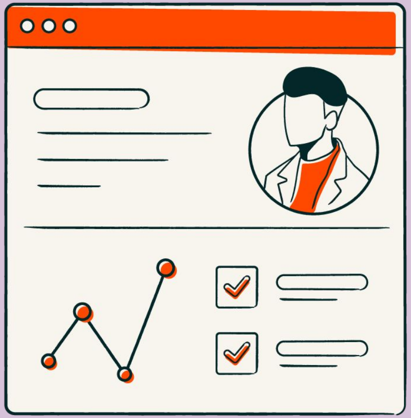
New Current Customer System Property

A new system-managed Current Customer property lets you define what counts as a current customer for contacts, companies, and custom objects, giving CS teams a consistent filter for their views.

- Define the property using lifecycle stage, a single property value, or advanced filters in Customer Success workspace settings.
- Applied as a default filter on all customer views created in the CS workspace.
- Existing customers can add this property to their views manually; no default is applied retroactively.

Service Hub | Professional+ | Live

Launch region: Global



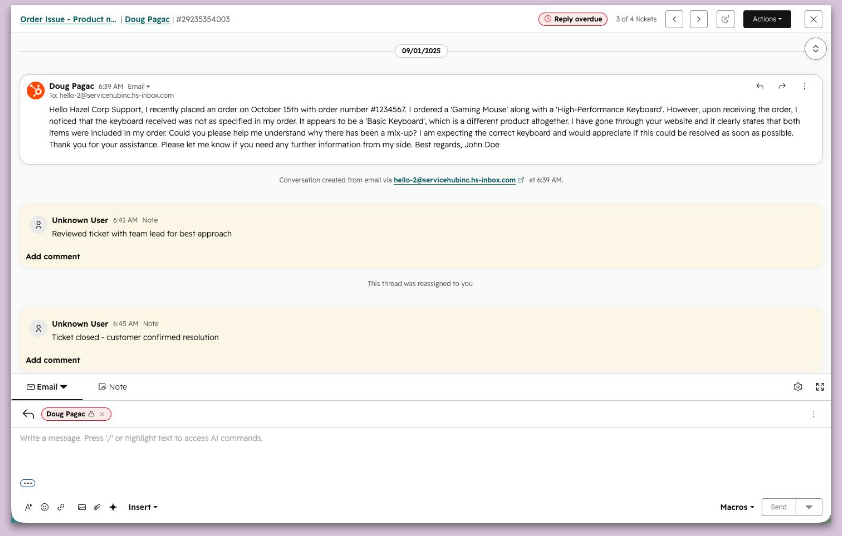
Expand or Collapse All Messages in Help Desk

A new floating button lets support reps expand or collapse every message in a thread at once, replacing individual see-more clicks and keeping messages expanded as you scroll through a ticket.

- The most recent message opens automatically when you open a ticket, so you land in context immediately.
- Use the floating Expand All / Collapse All button to control the entire thread at once, with no setup required.
- A separate full-screen mode strips the view to just the conversation thread and reply editor for focused work.

Service Hub | Professional+ | Live

Launch region: Global



Support Macros in Help Desk

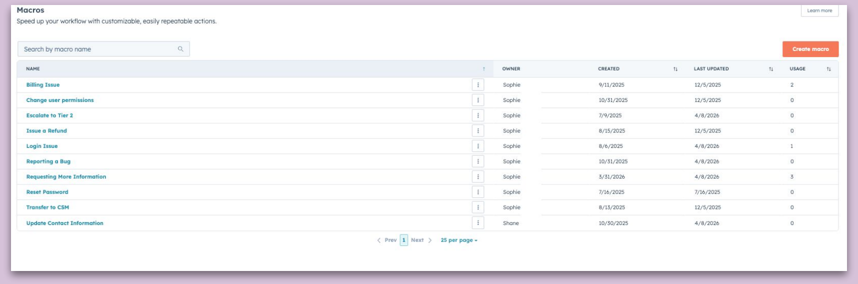
Macros let support reps send a reply and trigger multiple follow-up actions like updating ticket status, owner, or priority with a single click, replacing multiple manual steps in the ticket workflow.

- Create macros with a message and follow-up actions: update ticket owner, status, priority, or any editable property, or enroll in a workflow.
- Share macros with your whole team or specific users and teams, and manage sharing in bulk from the macros list page.
- Apply a macro from the reply editor by clicking Macros, selecting one, and clicking Send and apply.

Note: Macros are only available in Help Desk. Service Professional portals can create up to 500; Service Enterprise up to 1,500.

Service Hub | Professional+ | Live

Launch region: Global



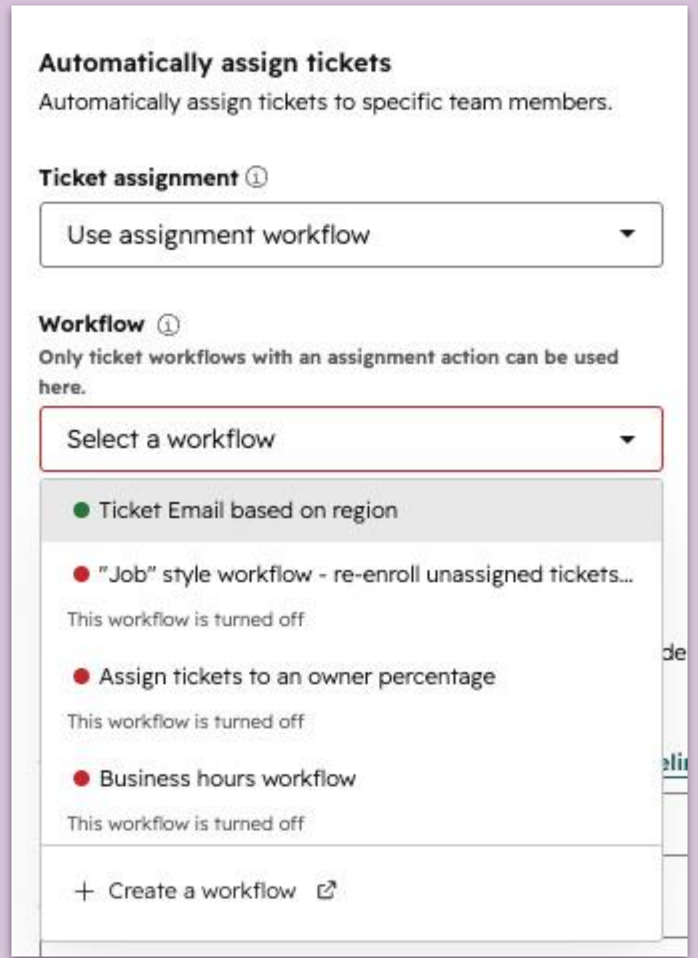
Route Help Desk Tickets via Workflows

A new Use assignment workflow option in Help Desk routing lets incoming tickets flow into a workflow that handles complex assignment logic, replacing workarounds like leaving tickets unassigned.

- Handle VIP routing, language-based assignment, multi-step logic, or conditional Customer Agent handoffs from one workflow.
- Select the workflow that owns assignment decisions in Help Desk or Chatflows channel settings.
- All tickets from the configured channel enroll in the selected workflow, with full transparency in assignment details and workflow logs.

Service Hub | Professional+ | Live

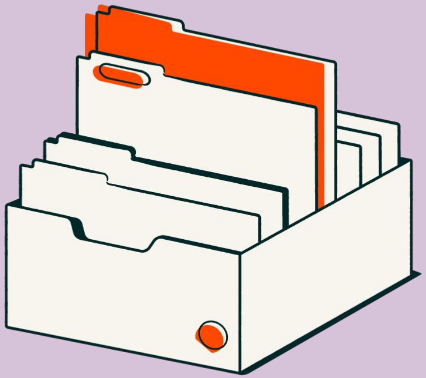
Launch region: Global



Close a Chat, Keep the Ticket Open

Help desk users can now end a live chat while leaving the associated ticket open, allowing support reps to investigate further or follow up without losing ticket context.

- Click the end chat button in the reply editor to close the chat while keeping the ticket open.
- The rep is automatically switched to the email channel, and a message notifies the visitor that the chat has ended.
- If no contact is linked to the ticket, you're prompted to add one or confirm before ending the chat.



Service Hub | Professional+ | Live

Launch region: Global

What's New for

Admins & Operations

HubSpot

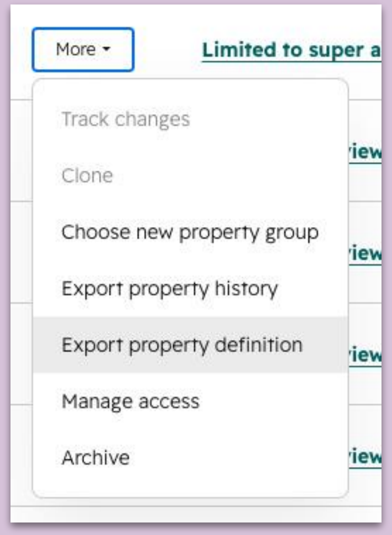
Export Property Definitions with Full Usage Data

When you export a property's definition, you now get direct links to every form, workflow, or asset using that property, plus workflow status metadata and property access information.

- Sheet 2 includes a row for each usage with a direct link to the asset in HubSpot and workflow on/off status.
- Sheet 3 includes property access information for the exported property.
- Share the export so anyone can review property usage without needing app access.

All Products | All Plans | Live

Launch region: Global



Archive Individual Property Options

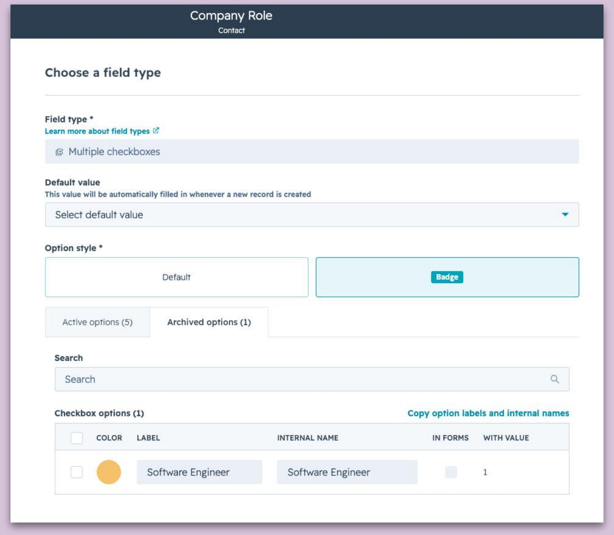
You can now hide individual options on dropdown, checkbox, and radio select properties so they're no longer available for selection, while keeping existing records that use them intact.

- Toggle off any option in the property editor in Settings > Properties to hide it from selection across HubSpot immediately.
- Records that already use a hidden option continue to display it, but users can't reselect it if they update the field.
- Retire deprecated options without renaming them "Do not use" or touching historical data.

Note: User and pipeline stage properties are not supported for archiving options.

All Products | All Plans | Live

Launch region: Global



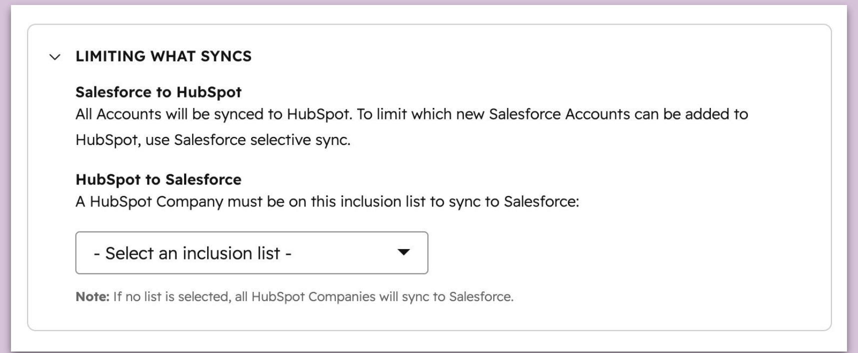
Salesforce Inclusion Lists for More Object Types

You can now create inclusion lists for companies, tickets, and custom objects in Salesforce sync settings, extending the fine-grained sync control that previously only existed for contacts.

- Set inclusion list rules for companies, tickets, and custom objects to control exactly which records sync with Salesforce.
- Access the new options in Settings > Integrations > Connected Apps > Salesforce under each object's sync rule menu.
- Object sync may need to be upgraded before the new inclusion list options appear.

All Products | Professional+ | Live

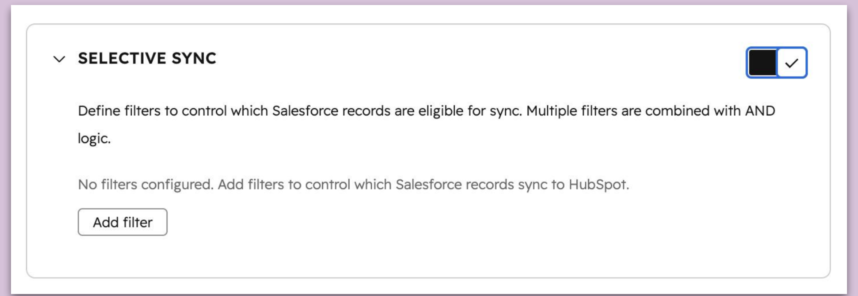
Launch region: Global



Selective Sync for Salesforce Objects

You can now set filters to control which Salesforce objects sync with HubSpot, giving you on the Salesforce side the same data control you already have on the HubSpot side.

- Records matching your filters sync to HubSpot; Salesforce objects that don't match are skipped.
- Currently available for custom objects, tickets, companies, and deals; contact sync support is coming later in 2026.
- Find selective sync settings in Settings > Integrations > Connected Apps > Salesforce.



All Products | Professional+ | Live

Launch region: Global

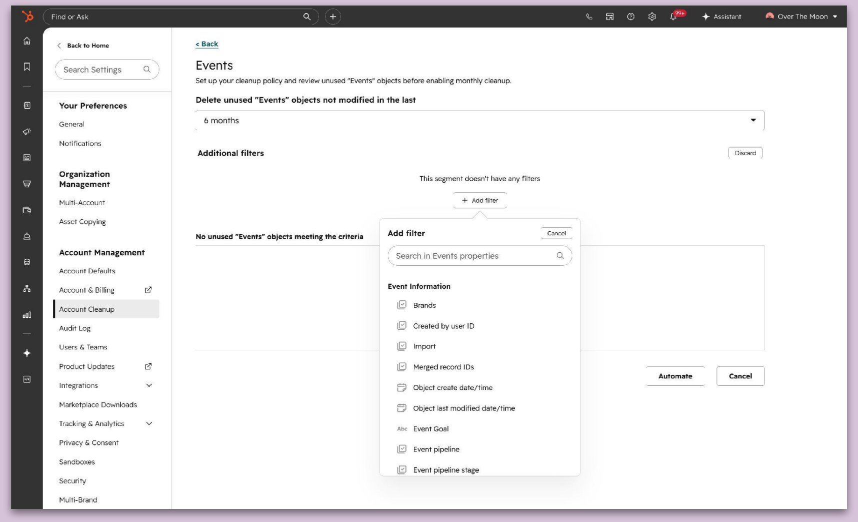
Automate Cleanup of Custom Object Records

The Account Cleanup tool now supports custom objects, letting you set policies to automatically remove outdated records based on time since last update or modification.

- Configure your cleanup policy in Settings > Account Cleanup under the Custom Objects section.
- Eligible records are removed immediately; new records meeting your criteria are removed on the first of every month.
- Deleted records can be recovered from the CRM within 90 days.

All Products | Enterprise+ | Live

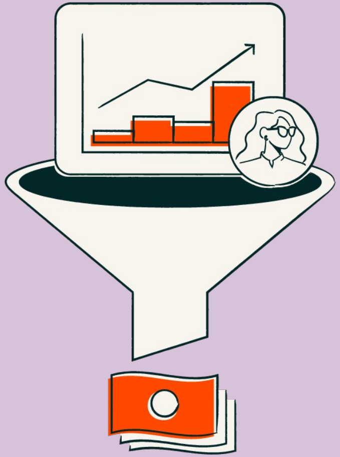
Launch region: Global



Control Stage Calculated Properties by Pipeline

You can now choose which pipelines and stages generate stage calculated properties, reducing property clutter for pipelines you don't actively use in reporting or workflows.

- By default, SCPs are disabled for new custom pipelines and stages and can be enabled whenever needed.
- A new usage tracker shows your current SCP count against the 4,500 property limit per object type.
- Manage SCP settings in Settings > Objects > select your object type > Pipelines.



All Products | Professional+ | Live

Launch region: Global

Mirror More Contact Data Across Accounts

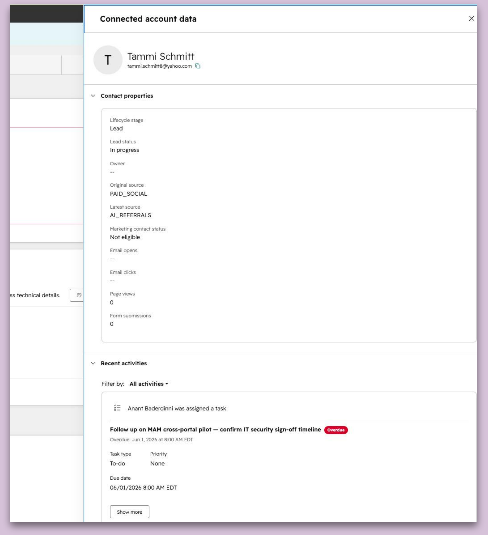
Data mirroring now includes lifecycle stage, lead status, contact ownership, and marketing activities, giving multi-account users a unified view of customer engagement across connected HubSpot accounts.

- Unified contact records now display marketing engagement and relationship state from connected accounts.
- Contact and company properties are mirrored automatically with no manual configuration required.
- Use expanded data to identify cross-sell opportunities and route leads more effectively.

Note: Requires data mirroring connections established within your organization.

All Products | Professional+ | Live

Launch region: Global



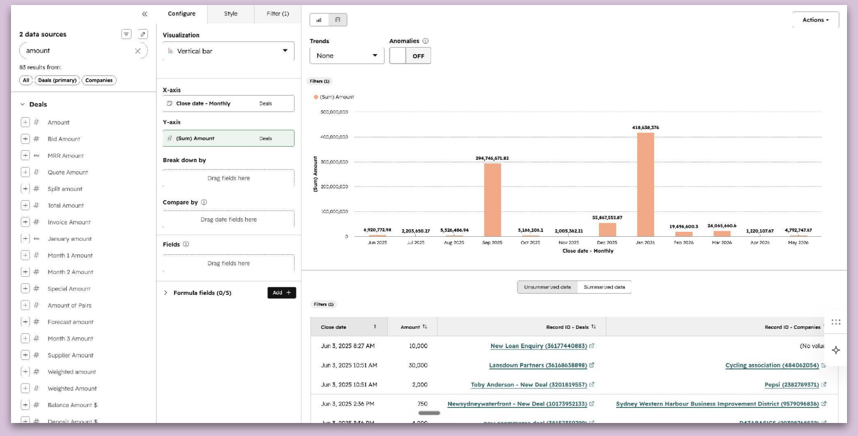
Redesigned Custom Report Builder

The Custom Report Builder has been reorganized into Data, Style, and Filters tabs with a new chart picker and visualization-only mode, making it faster to build and edit reports.

- Add fields via the "+" icon for a smart add, use the new chart picker with recommended chart guidance, or toggle visualization-only mode.
- The three-tab layout (Data, Style, Filters) provides a clearer path for configuring your report; table view is the default on entry.
- Enable AI summary on any visualization to get automated insights into your data.

All Products | Professional+ | Live

Launch region: Global



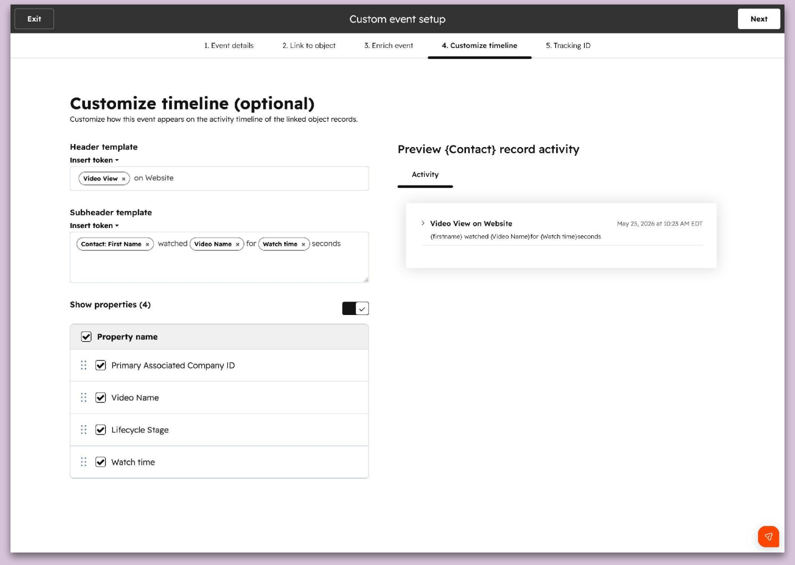
Customize Custom Event Timeline Cards

When setting up a custom event, you can now define the header, subheader, which properties are shown, and their order on timeline cards, so reviewers understand what happened without digging into raw event data.

- Use the Insert token dropdown to build headers that pull in real values like contact name or custom event properties.
- Choose which event properties appear on the expanded card and drag them into the order most useful for your team.
- Turn off Show Properties entirely when the header and subheader tell the full story on their own.

All Products | Professional+ | Live

Launch region: Global



Import Users with More Fields at Once

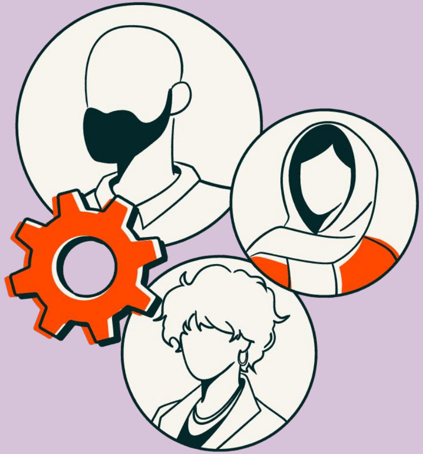
User import now supports teams, seats, managers, job titles, and custom user properties, so you can complete your full user setup in a single import instead of assigning fields manually afterward.

- Supported fields now include job title, manager, team assignment, seat assignment, permission sets, and custom user properties.
- Download the updated template from Settings > Users > Import Users, fill in the fields you need, and upload.
- Enhanced validation flags errors before the import completes, reducing manual cleanup.

Note: Team and seat assignment require Professional tier or above. Custom user properties require Enterprise.

All Products | All Plans | Live

Launch region: Global



Automate Cleanup of Old Orders

You can now use the Account Cleanup tool to automatically remove outdated orders from your CRM based on your own criteria, replacing the need to delete old orders manually.

- Set your cleanup policy in Settings > Account Cleanup under Orders, including the time window for qualifying records.
- Eligible orders are removed immediately; new orders meeting your criteria are removed on the first of every month.
- Deleted orders can be recovered from the CRM within 90 days.

All Products | Enterprise+ | Live

Launch region: Global

Redesigned Brand Settings in HubSpot

Brand settings have been reorganized into three focused sections: Brand Kit, Brand Voice, and Brand Knowledge, making it faster to find, set up, and update your brand configuration.

- Colors, fonts, writing samples, and company context each have a dedicated section, so updates take seconds instead of scrolling through a wall of fields.
- Brand Knowledge is a new section that shows and lets you edit company data HubSpot uses for AI-generated content, including products, competitors, and ideal customer profile.
- All users automatically see the new experience with no action required.

All Products | All Plans | Live

Launch region: Global

Custom Formula Editor Moves to a Side Panel

The custom formula editor in Data Studio has moved from the bottom of the screen to a side panel, giving you more space to write formulas and see the output as you work.

- Access the updated editor by clicking Formulas > Add Custom Formula in Data Studio.
- The side panel layout provides more working space without changing the editor's behavior or formula syntax.

Data Hub | Professional+ | Live

Launch region: Global

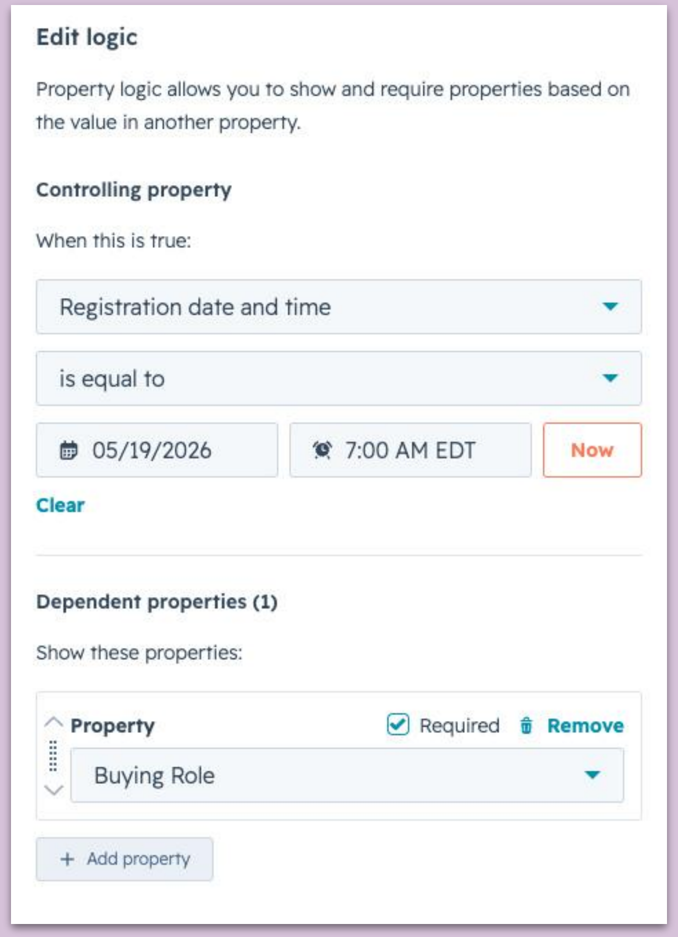
Date-Driven Conditional Property Logic

Date and datetime properties can now trigger dependent fields in conditional property logic, surfacing or requiring properties based on date values automatically.

- Surface a Renewal terms field only after a contract end date is set, or require Kickoff notes once a start date is known.
- Make a Reason for delay property required when a due date passes, capturing context without a manual follow-up.
- Set up in Settings > Properties > Conditional logic by selecting any date or datetime property as the controlling field.

All Products | Professional+ | Live

Launch region: Global



Set Credit Limits by Feature

Admins can now set monthly credit limits for individual credit-consuming features, giving more granular and predictable control over AI spend beyond the existing portal-wide cap.

- Set limits per feature in the Usage & Limits dashboard, in addition to or instead of a portal-level cap.
- Feature-level limits cannot exceed any portal-level limit you've set.
- Credit limits are not on by default — you configure them when you're ready.

All Products | All Plans | Live

Launch region: Global

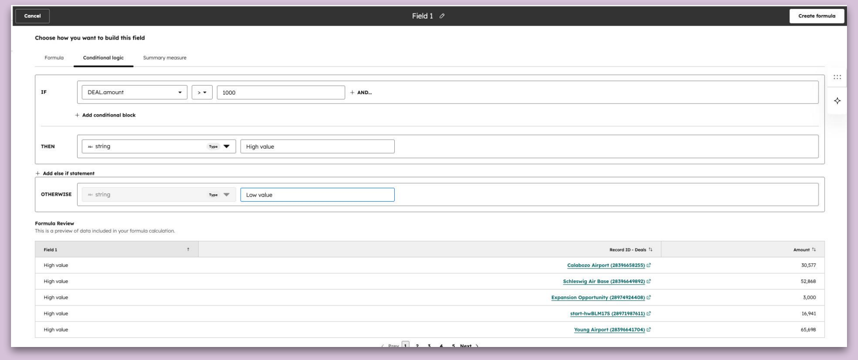
New Formula Builder Options in Reports

The Custom Report Builder now offers two guided formula interfaces, Conditional Logic for if/else cases and Summary Measure for aggregations, alongside the existing syntax and AI options.

- Use Conditional Logic to build if/else formulas through a guided interface without writing syntax.
- Use Summary Measure to create aggregations on a measure through a step-by-step guided flow.
- Switching between formula tabs clears any work in progress — formulas are not transferable between options.

All Products | Professional+ | Live

Launch region: Global



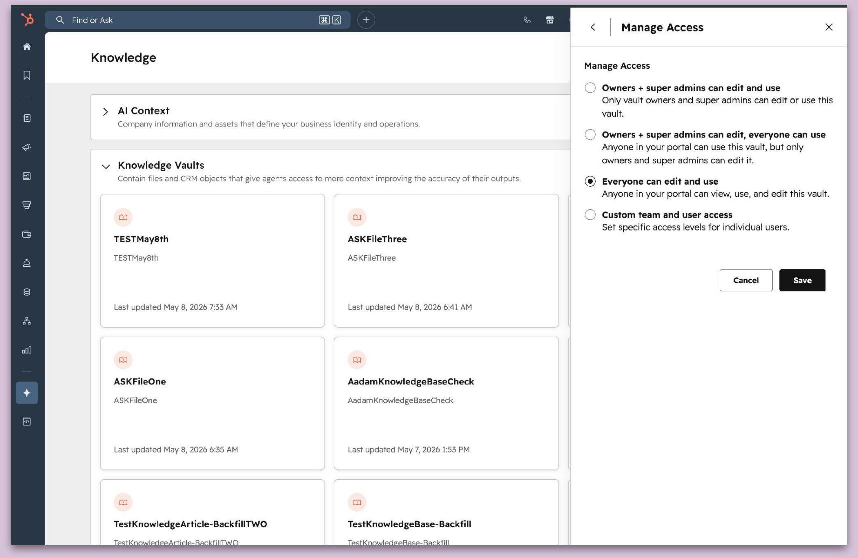
Granular Knowledge Vault Permissions

Admins can now control access to knowledge vaults with Manage and Use permissions at both the portal and vault levels, keeping the right content available to the right people.

- Assign Manage permissions to let users create, edit, and delete vault content and manage vault access.
- Assign Use permissions to let users view vaults and attach them to agents without modifying them.
- Super admins always retain full access and can bypass vault-level restrictions.

All Products | All Plans | Live

Launch region: Global



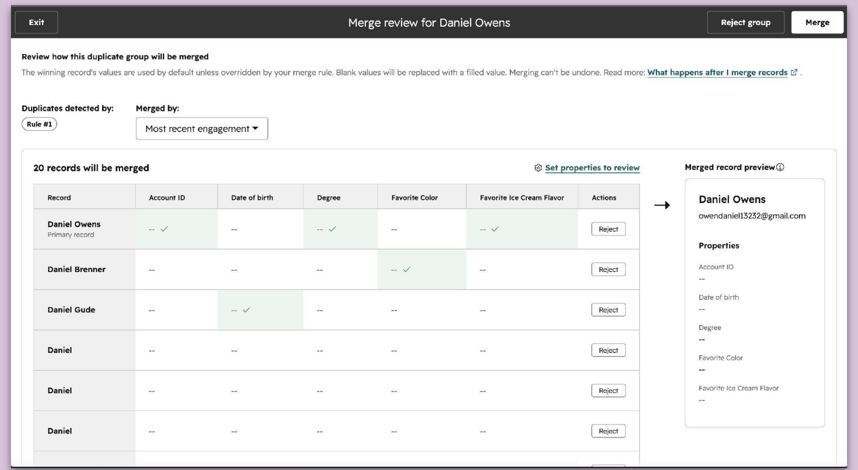
New Merge Preview for Duplicate Records

Users with custom duplicate detection rules can now preview a merge before executing it, seeing the full duplicate group and selecting property overrides to merge more confidently.

- See all records in a duplicate group and the rule that surfaced them before committing to the merge.
- Add any properties to the preview table and manually select which values to carry over to the winning record.
- This preview will soon become the default merge experience for the HubSpot AI model as well.

All Products | Professional+ | Live

Launch region: Global



Custom Duplicate Detection Rules

You can now define your own duplicate detection criteria using exact matches on up to nine standard or custom properties for contacts and companies, beyond HubSpot's default AI model.

- Create up to two custom rules per object type, each matching on up to nine properties that must match exactly.
- Use any property type, including custom properties, giving teams full control over their duplication logic.
- Export duplicates surfaced by custom rules directly from the Manage Duplicates table.

Data Hub | Professional+ | Live

Launch region: Global

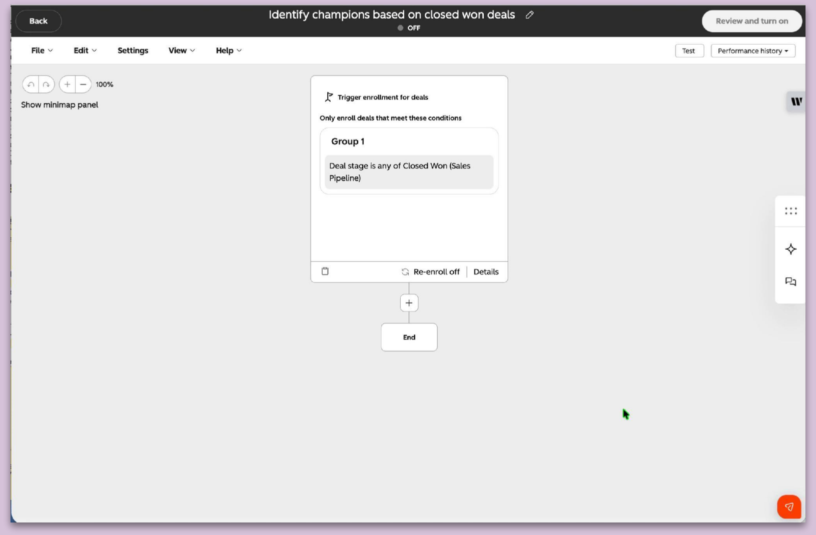
Association Action Targeting

Workflow association actions can now target records associated with the enrolled record, enabling complex CRM relationship updates across connected records in a single workflow.

- Target associated records by type, label, or recency criteria such as most recently created or first associated.
- Update relationship labels across connected records without building separate workflows for each object type.
- Example: when a deal closes, automatically mark decision-maker contacts as champions at the associated company.

All Products | Professional+ | Live

Launch region: Global



Dashboard Settings Panel

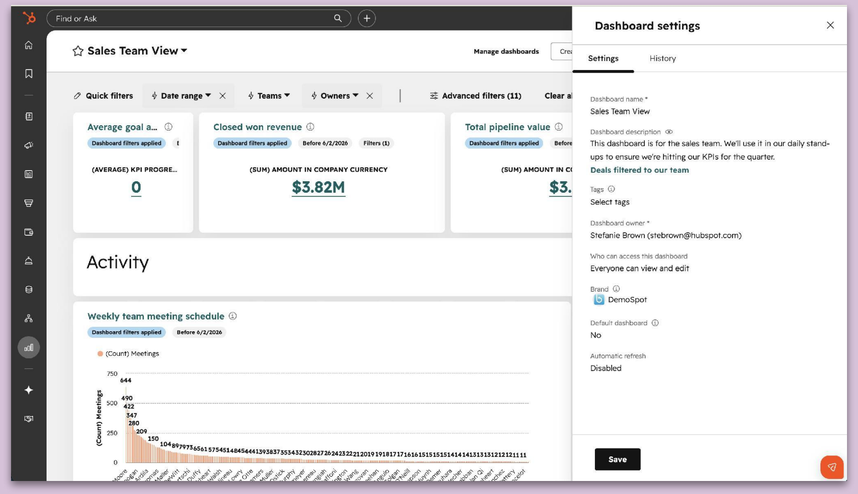
All dashboard settings are now consolidated in a single panel, and a new History tab shows who changed what and when, reducing the friction of managing dashboards across your team.

- Edit name, owner, description, tags, brand, auto-refresh, and default settings from one panel.
- Reassign ownership directly from the panel header using the quick-action control.
- Review the full change history for any dashboard, including who made each update and when.

Note: Requires admin or dashboard owner permissions.

All Products | All Plans | Live

Launch region: Global



What's New for

All Teams

HubSpot

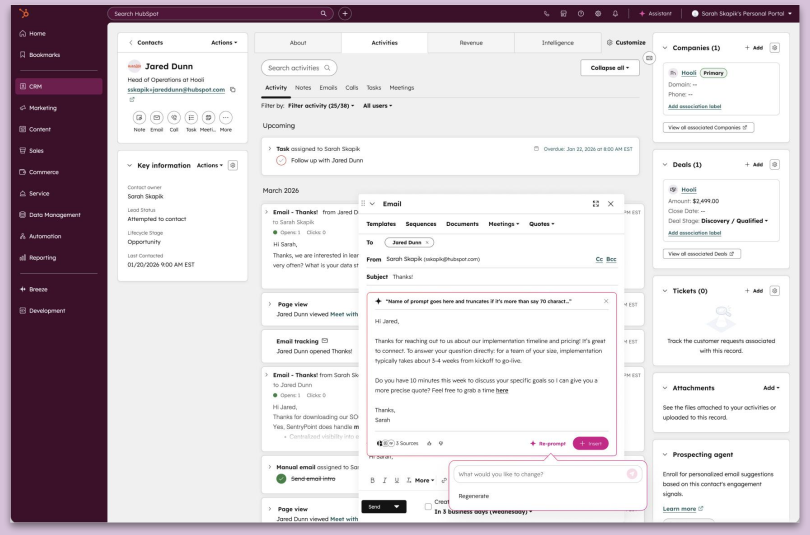
Draft Emails with Breeze in the CRM Composer

Breeze Assistant is now available directly inside the CRM Email Composer, so you can generate and refine email content inline without leaving the window you're already writing in.

- Invoke Breeze by typing "/" in the editor or clicking the Breeze button in the toolbar; an inline prompt modal opens.
- Generate email text or a suggested reply, re-prompt to refine it, then insert it directly into the composer.
- Available on web only; not supported in the HubSpot mobile app.

All Products | All Plans | Live

Launch region: Global



Higher Association Limits for Key Object Types

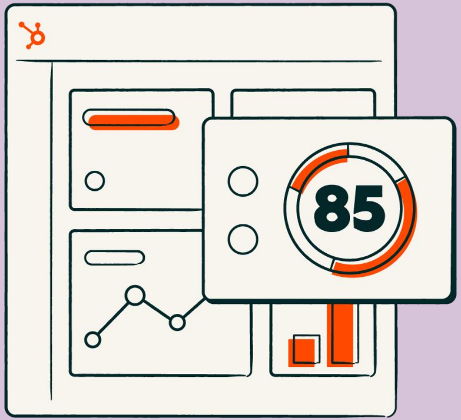
HubSpot has increased association limits for select object types, letting your account scale to larger datasets without hitting caps on contacts, deals, or tickets associated with companies.

- Associate companies with up to 500,000 contacts, deals, or tickets; associate contacts with up to 50,000 deals or 500,000 tickets.
- Enterprise accounts can now associate custom object records with up to 500,000 records of any other object.
- New limits are applied automatically; no configuration required.

Note: Search results for high-limit associations are capped at 300,000 records per query, and rollup properties may update more slowly.

All Products | All Plans | Live

Launch region: Global



Breeze-Powered Summaries in Global Search

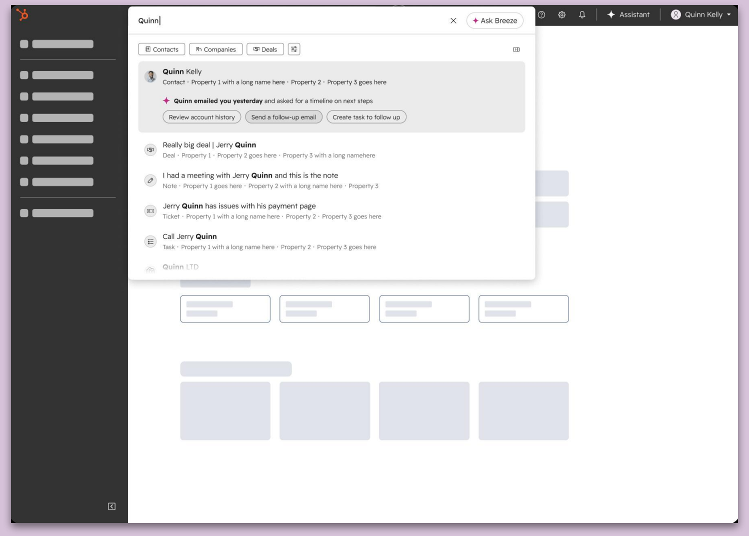
Breeze Assistant now surfaces contact summaries and suggested next actions directly in Global Search results, letting you continue common workflows from search without opening a record first.

- Breeze may appear alongside the top contact search result with a short summary based on available context.
- Suggested actions include reviewing recent activity, preparing for a meeting, or drafting a reply.
- Selecting a suggested action opens Breeze with a pre-filled prompt so you can complete the task immediately.

Note: Available on web only; not supported in the HubSpot mobile app.

All Products | All Plans | Live

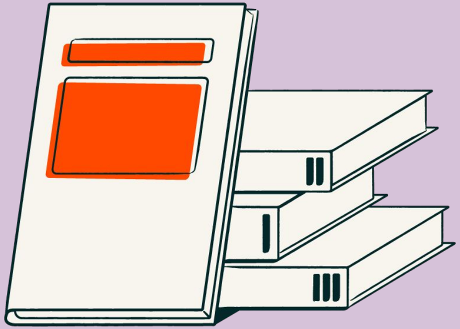
Launch region: Global



Upload Structured Data to Knowledge Vaults

Knowledge Vaults now accept structured data files (xlsx, csv, json, xml), enabling agents to answer analytical and aggregation questions directly from uploaded tabular data.

- Upload xlsx, csv, json, or xml files through the standard Knowledge Vault file picker; these types are now fully supported.
- Agents use natural-language lookups to query the uploaded data, just like other Knowledge Vault content.
- No additional configuration needed; the structured data analysis tool is enabled automatically on upload.



All Products | All Plans | Live

Launch region: Global

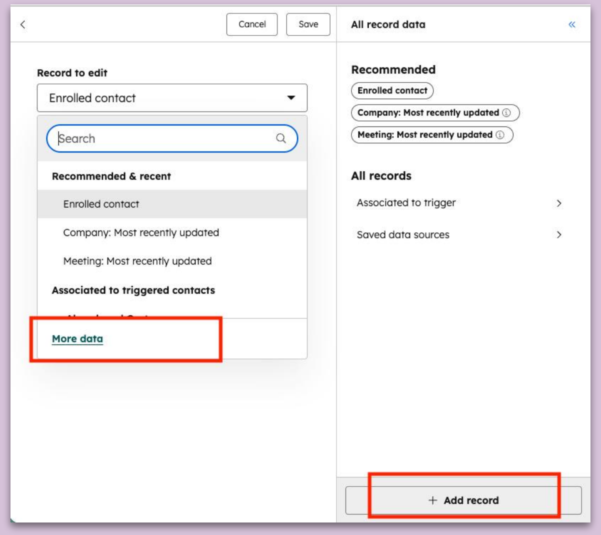
Use Workflow Actions Across All Workflow Types

A selection of workflow actions are now available in every workflow type and can act on associated objects or custom data sources, so you can do more in a single workflow instead of building multiple.

- Use actions like "Add to Ads Audience" in any workflow type, including company and deal workflows, targeting associated records.
- In actions like "Add to Static Segment," choose whether to act on the enrolled record or any of its associated records.
- Use "More Data" in the record dropdown to act on custom data sources beyond the enrolled object and its direct associations.

All Products | Professional+ | Live

Launch region: Global



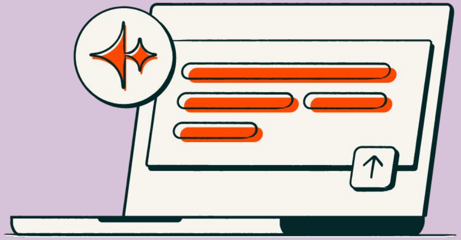
AI-Powered CTAs in Task Assignment Emails

When a contact, company, ticket, or deal is assigned, assignees now receive notification emails with AI-generated call-to-action buttons that link directly to the relevant record, reducing the delay between assignment and action.

- Notification emails include a primary (and optional secondary) AI-generated CTA button based on the object type and context.
- Clicking the CTA opens the relevant record and the Breeze Assistant sidebar, prefilled with a summary and suggested next steps.

All Products | All Plans | Live

Launch region: Global



Analytics Suite Now Available on Starter

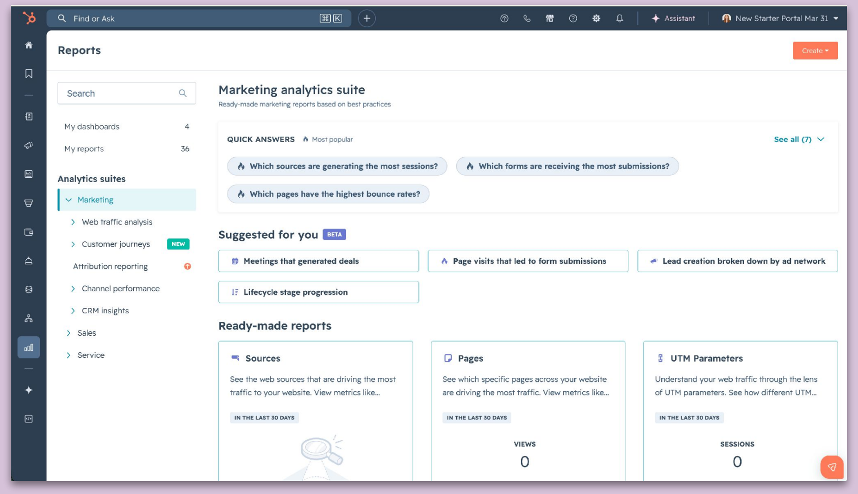
Starter customers now have access to 50 pre-built report templates in the analytics suite, covering core Marketing, Sales, and Service metrics, organized by category and ready to use without building from scratch.

- Browse 50 pre-built report templates across Marketing, Sales, and Service tabs in the analytics suite.
- Select a template to open a pre-configured report, then customize and save it to a dashboard.

Note: Custom report builder requires a Professional or Enterprise subscription.

All Products | Starter+ | Live

Launch region: Global



HubSpot Agent for Microsoft 365 Copilot

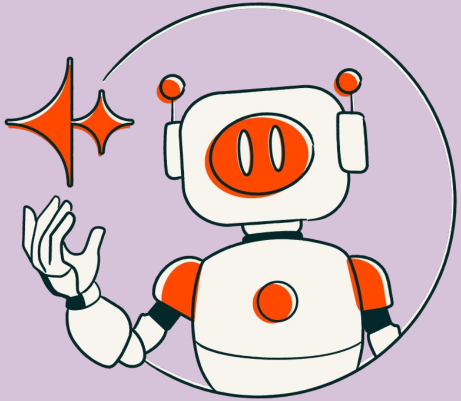
You can now access your HubSpot customer data and take actions directly from Microsoft 365 Copilot, surfacing real-time deal summaries, ticket queues, and CRM insights without switching tools.

- Ask Copilot for deal summaries, open tickets, or customer context and it retrieves your HubSpot data live based on your existing permissions.
- Admins enable the connector once in the Microsoft 365 admin center, then users connect their own HubSpot account to get started.
- HubSpot data is never indexed into Microsoft 365, and the connector respects each user's HubSpot permissions.

Note: Requires a Microsoft 365 Copilot license or the Microsoft 365 Copilot Chat add-on with an eligible Microsoft 365 license.

All Products | All Plans | Live

Launch region: Global



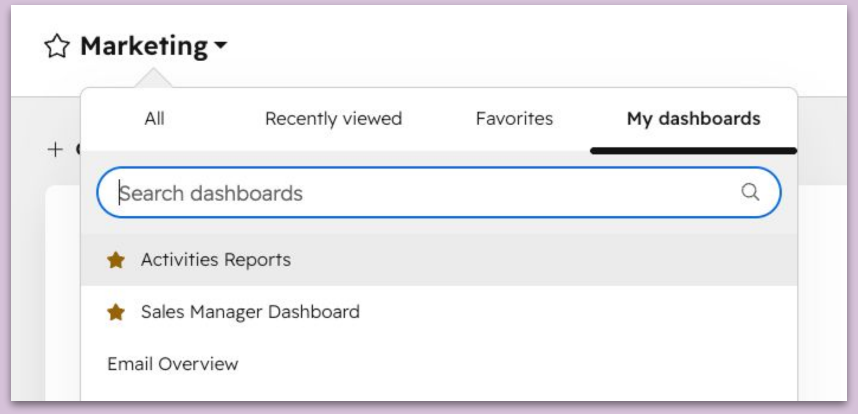
Faster Dashboard Switching with Categorized Tabs

The dashboard switcher now organizes your dashboards into tabs (All, Recently Viewed, Favorites, My Dashboards) and includes a search field, replacing undifferentiated scrolling with fewer clicks.

- Click the dashboard name at the top of the page to open the dropdown and filter by tab or search by name.
- Tabs include All, Recently viewed, Favorites, and My dashboards for faster navigation.

All Products | All Plans | Live

Launch region: Global



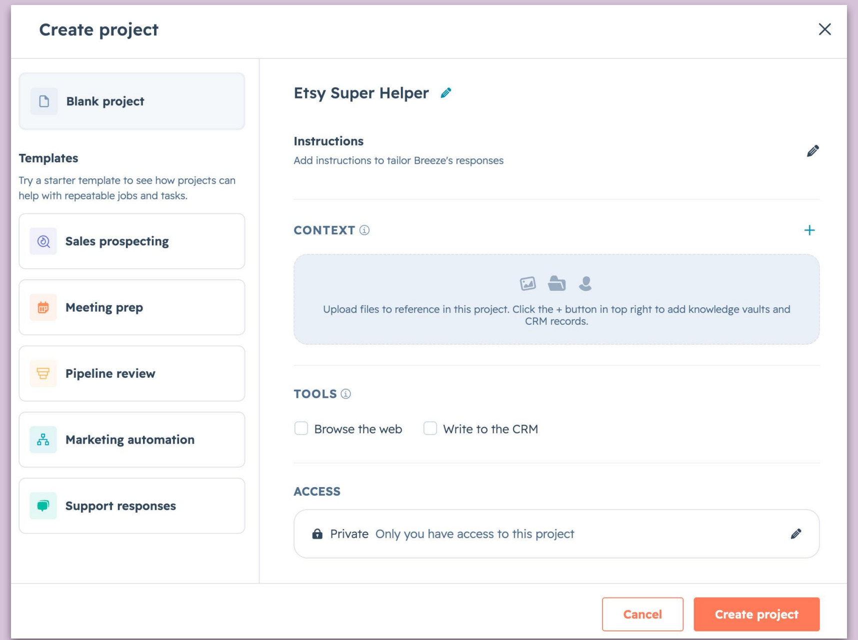
Breeze Projects Gets a Major Upgrade

The redesigned Breeze Projects workspace lets you upload files, @mention CRM records, and use built-in tools like Search the Web and Write to CRM, with context carried across every thread in a project.

- Upload PDFs, documents, spreadsheets, or images directly into a project for Breeze to reference across all threads.
- @mention any contact, company, deal, or ticket to give Breeze guided context for more precise answers.
- Use the Write to CRM tool to create or update records directly from the conversation.

All Products | All Plans | Live

Launch region: Global



See Associated Records on Any Index Page

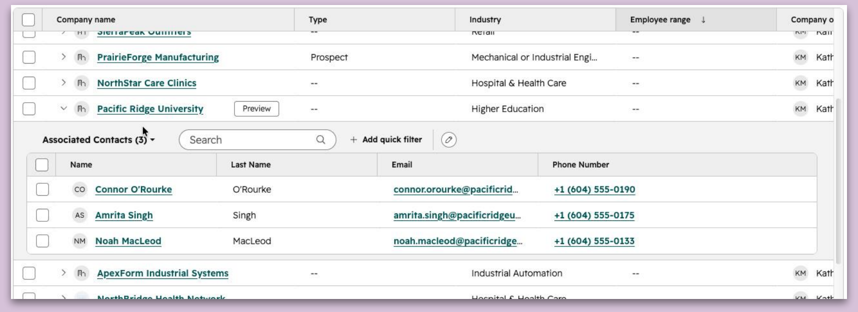
An expandable inline table on CRM index pages lets you view, filter, and take action on associated records from any object without navigating away.

- Click the caret next to any record to expand the inline association table and select the associated object type.
- Filter, customize columns, and run bulk actions on associated records directly from the index page.
- Save your column selection, sort order, and filters to the view for faster access next time.

Note: Requires portals enrolled in the new index UI via Flexible CRM Views or the Streamlined Index page.

All Products | All Plans | Live

Launch region: Global



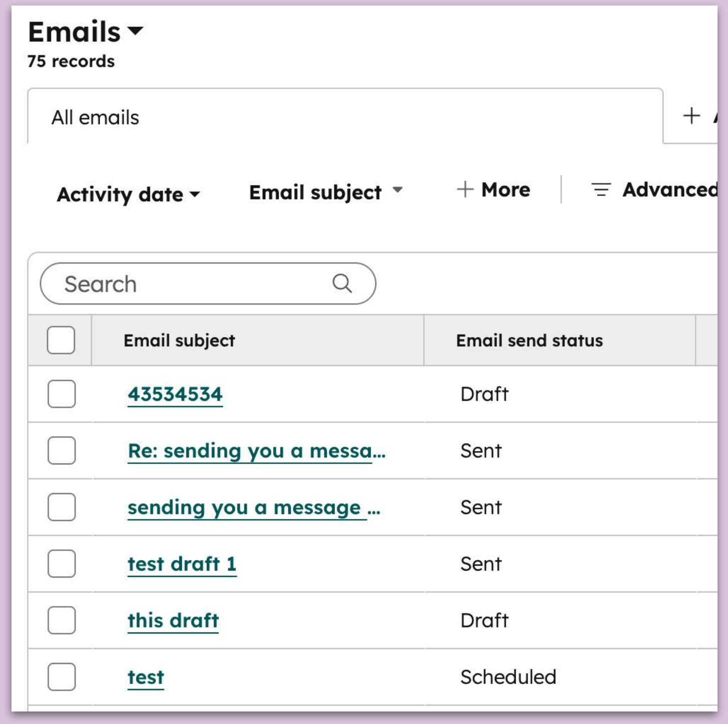
Save Draft and Edit Scheduled Emails

You can now save one-to-one emails as drafts to finish later and cancel or edit scheduled emails before they send, directly from the CRM timeline.

- Use Save as draft to store unfinished emails on the timeline and Email index page under the new Draft send status.
- Edit a scheduled email by selecting Cancel and edit from the timeline actions, then resend or reschedule it.
- Only you can see and edit your own draft emails.

All Products | All Plans | Live

Launch region: Global



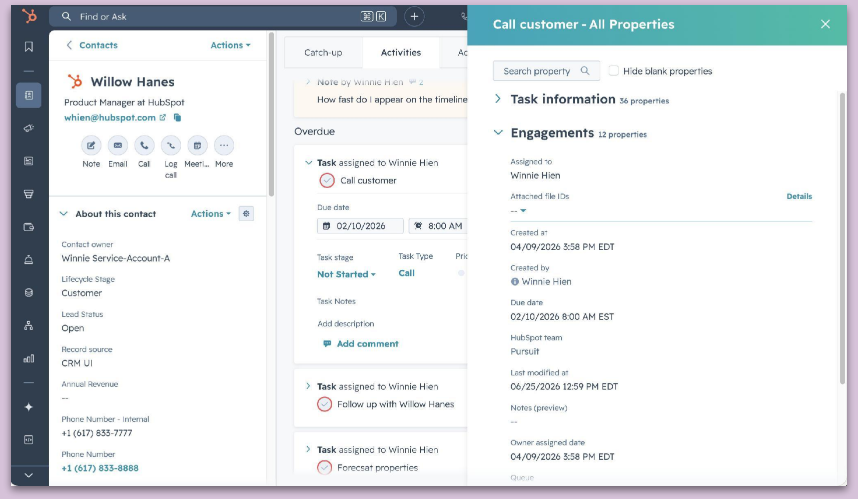
View All Properties on the Activity Timeline

You can now view all properties, including custom ones, directly from a task, call, or meeting on the activity timeline, without navigating away from the record page.

- Open any task, call, or meeting from the timeline and access the View all properties panel via Expand > Actions.
- See all standard and custom properties for the activity in one place, including previously inaccessible custom fields.
- Works across all record types, including contacts, companies, and deals.

All Products | All Plans | Live

Launch region: Global



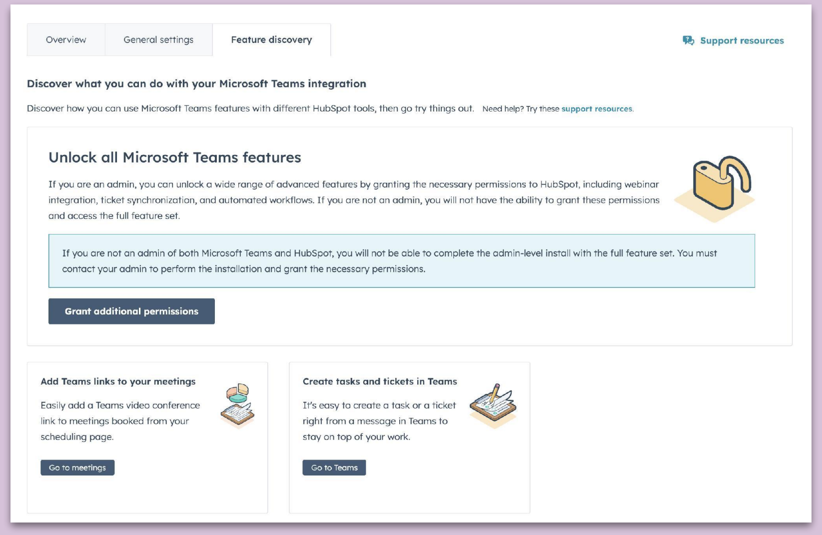
Microsoft Teams Integration Updates

Three updates to the HubSpot-Teams integration expand workflow notifications, improve call logging accuracy, and simplify app setup, reducing manual steps for both admins and reps.

- Send workflow notifications to individual Teams users, not just channels, across any HubSpot object type.
- Log multi-participant Teams calls to all relevant contacts in HubSpot, not just a single contact.
- Upgrade from user-level to admin-level installation directly from integration settings without reinstalling.

All Products | All Plans | Live

Launch region: Global



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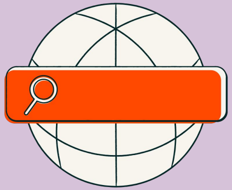

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