



# March (February) 2026 Partner Product Updates.



# What's New for Marketers

HubSpot

# Manage Participant States for Marketing Events

You can now update a contact's registration and participation status for marketing events directly from their contact record in HubSpot, eliminating the need for manual imports.

- Edit registration statuses (Registered, Canceled) and participant statuses (Attended) from the Marketing Events CRM card on any contact record without a bulk import.
- Segment and follow up with contacts based on real-time event attendance data before, during, and after your events.

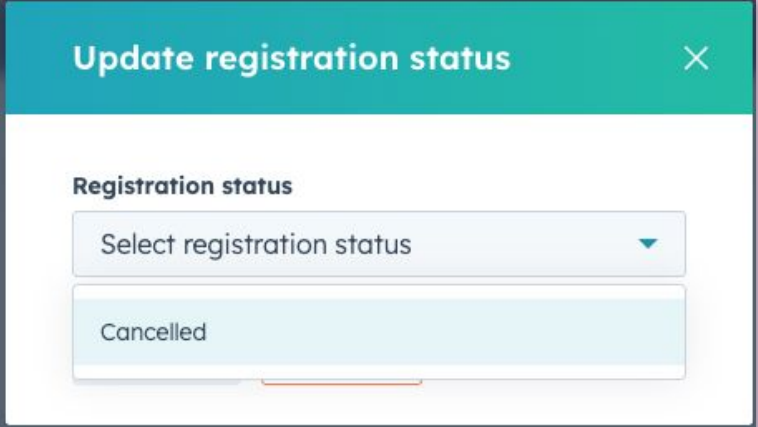
Note: You cannot manually set a status to No Show or change the status of a contact already marked as Attended.

All Products

All Plans

Public Beta

Launch region: Global



Update registration status

Registration status

Select registration status

Cancelled

# New Workflow Action to Register a Contact to a Marketing Event

A new workflow action "Add participant to Marketing Event" lets teams automatically register contacts to manually created HubSpot Marketing Events based on workflow triggers like form submissions.

- Trigger contact registration automatically (e.g., when a form is submitted) by adding the "Add participant to Marketing Event" action under the Marketing section in any contact-based workflow.
- Eliminates the need for manual data imports or custom API solutions to enroll event registrants.

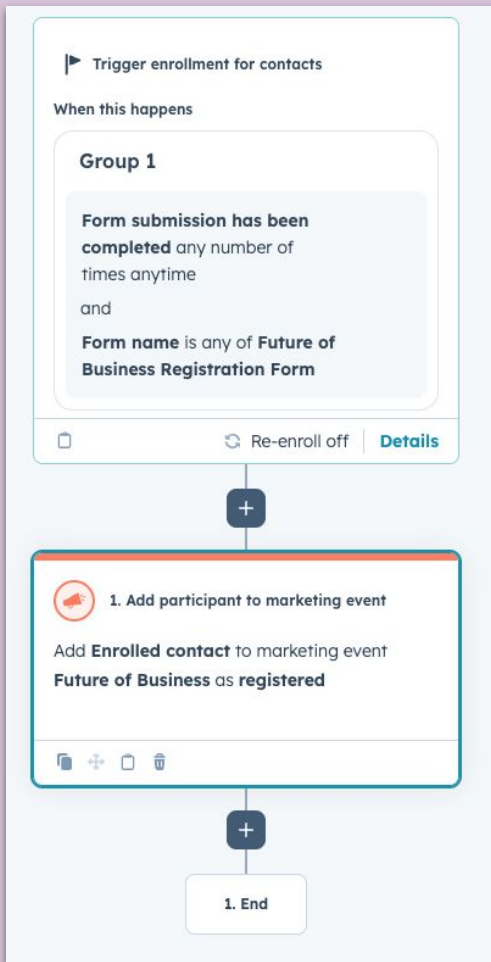
Note: This action only works with events manually created in HubSpot. It cannot be used for events synced via third-party integrations.

All Products

All Plans

Live

Launch region: Global



# Personalization App Supports Website Pages

The Personalization app now supports website pages, letting you create and manage audience-specific page variants in one place.

- Build personalized versions of website pages using variants with either manual setup for full control or AI-assisted setup for a faster start.
- Manage all personalized page experiences from a single location without the overhead of maintaining separate pages.
- Use the Analyze tab within Personalization to track how each page variant performs across audience segments.

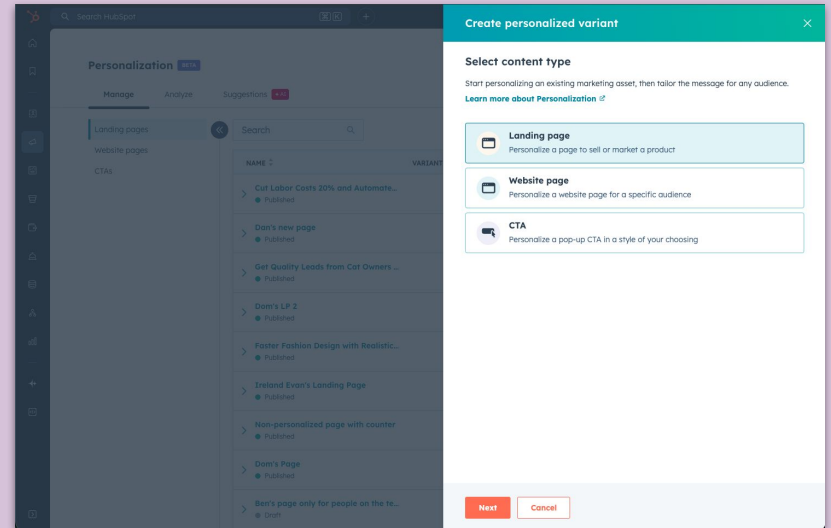
Marketing Hub

Content Hub

Professional+

Live

Launch region: Global



# Conditional Scoring for Lead & Health Scores

Lead and Health Scoring now support multi-criteria conditional rules using "AND" logic, allowing teams to award or subtract points based on a combination of property or event-based conditions.

- Build fit scoring rules that require multiple properties to all be true at once.
- Build engagement scoring rules tied to specific event context.
- Centralizes logic within the Scoring tools, eliminating the need for Customer Success or Marketing teams to create workaround logic via list membership or workflow enrollment.

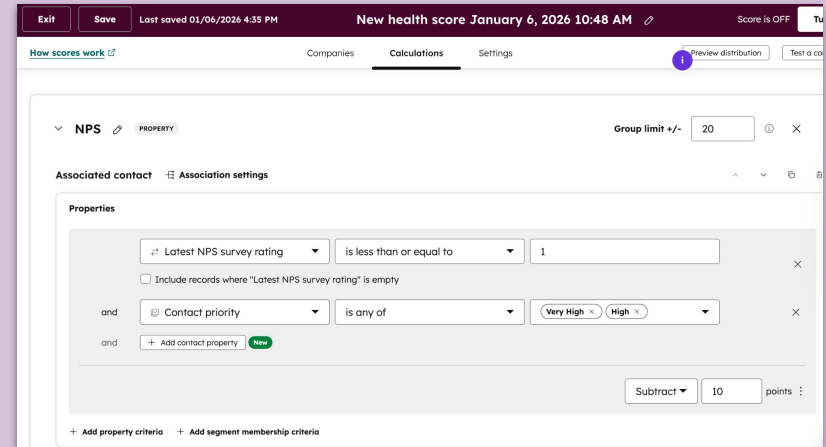
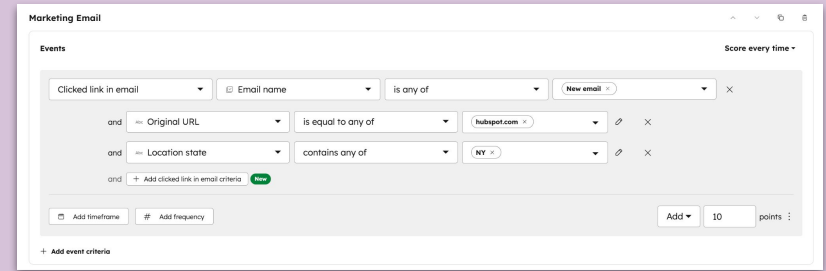
Marketing Hub

Sales Hub

Professional+

Live

Launch region: Global



# UTM Settings Page for Marketing Studio

A new centralized UTM Settings page in Campaigns gives marketing teams more control over how campaign UTMs are generated, standardized, and managed across their HubSpot account.

- A unique identifier is now automatically added to UTM values by default, preventing tracking breaks when campaign names change.
- Reduces manual cleanup work and helps teams standardize UTM conventions as campaign volume grows.

Marketing Hub

Professional+

Live

Launch region: Global



# Upgraded Social Analytics

The Social Analyze tab has been redesigned with a new set of curated, ready-to-use reports organized into four performance categories, making it easier to understand and prove the ROI of your social media efforts.

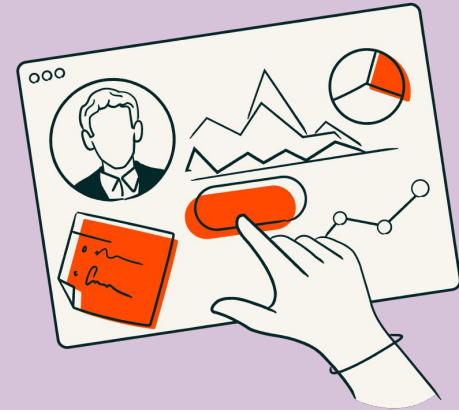
- Access pre-built reports across four categories (Grow Your Brand, Drive Engagement, Track Leads from Social, and Optimize Your Content) without building reports from scratch.
- Filter all reports by social account, network, and time range to get the exact performance view you need.

Marketing Hub

Professional+

Public Beta

Launch region: Global



## Campaign Properties and Events Now Available in Workflows

Campaign properties and events are now available in workflows, allowing you to trigger automations based on campaign-level data or when a contact is influenced by a campaign.

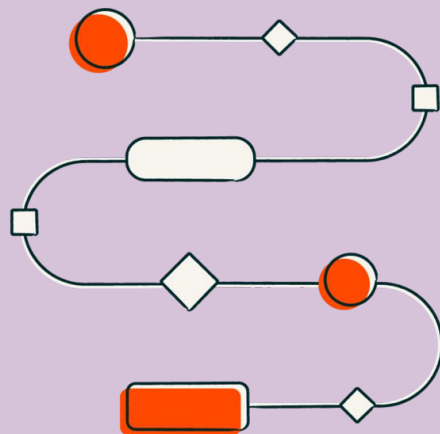
- Set up budget overspend alerts by triggering a workflow when a campaign's spend exceeds its budget, eliminating the need for manual monitoring.
- Automatically enroll influenced contacts into tailored follow-up sequences the moment they're attributed to a campaign.

Marketing Hub

Professional+

Public Beta

Launch region: Global



# Video Capture: Record Videos Directly in HubSpot

You can now record webcam, screen, or combined screen-and-webcam videos natively inside HubSpot and save them directly to your video library — no third-party apps or file uploads required.

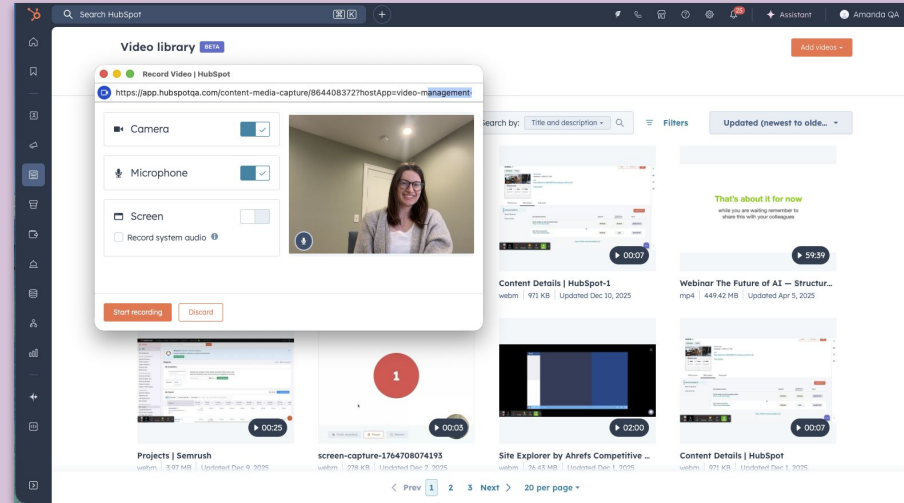
- Choose your recording type (webcam, screen share, or overlay), select audio/camera inputs, and use on-screen controls to pause, stop, save, or delete — all within HubSpot.
- Recorded videos save directly to your HubSpot video library for immediate reuse across other content, keeping sensitive recordings off personal devices.

Content Hub

Professional+

Public Beta

Launch region: Global



# What's New for Sellers



# Additional Company News Signals

Four new Company News signals (Industry Recognition, Office Closure, Physical Expansion, and Regulatory Approval) are now available in Buyer Intent, automatically surfacing key account milestones on the company timeline.

- Reach out to your prospects with timely, relevant outreach. For example, congratulating them on a recent industry award.
- Use Physical Expansion or Industry Recognition as workflow triggers and lead scoring inputs to prioritize accounts with the most momentum.

All Products

All Plans

Live

Requires Credits

Launch region: Global



# Sales Documents Multi-Brand Support Now Live

Sales Documents now supports multi-brand assignment, ensuring each document displays the correct brand logo and colors in the Document Viewer for every buyer interaction.

- Assign a brand to any sales document at upload, or change it later via the Document Details page using the Actions > Change Brand dropdown.
- Filter your document library by brand to quickly find and manage collateral across your portfolio.

Sales Hub

All Plans

Live

Launch region: Global

[TEST] Sales Documents .pdf 

Missing description. [Add it now with Breeze](#) ✦

Brand 



Sub Brand A

Campaign



Branded Campaign



Turn on data privacy  [Learn more](#) 

LINKS CREATED

0

VISITORS

0

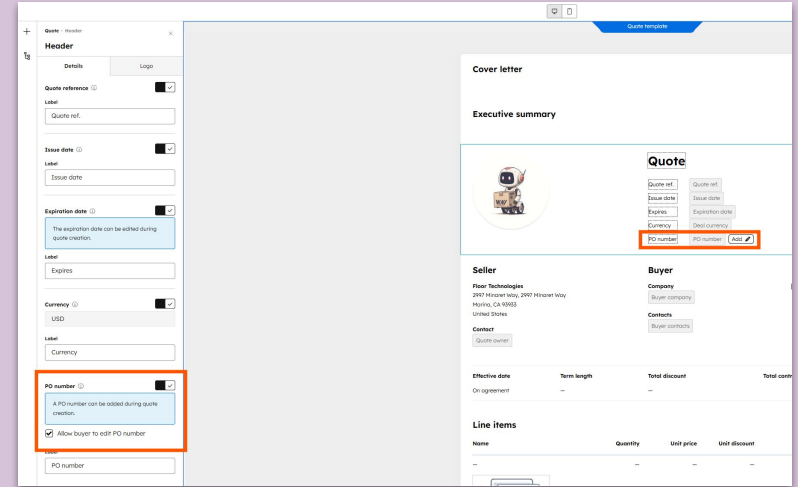
VIEWS

0

# Capture Buyer Details from Quotes

Sellers can now add billing fields including Purchase Order #, Buyer Tax ID, Billing Contact, and Billing Address directly to quotes, with the option to let buyers fill in or edit those fields before accepting.

- Collect PO numbers, tax IDs, and billing details within the quote itself, eliminating back-and-forth after the fact.
- Configure buyer edit permissions at the template level so defaults carry through to every quote created from that template.



Commerce Hub Professional+ Live

Launch region: Global

What's New for  
Support and Success



# Give Instructions to Customer Agent

Expressions let you write natural-language instructions that control how your Customer Agent communicates including tone, response style, scripted responses, and guardrails.

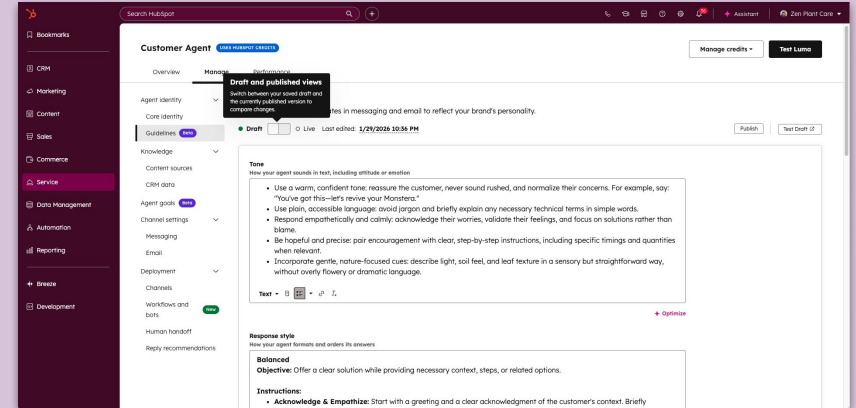
- Write instructions across five categories such as tone and response style to make the agent respond exactly the way your brand intends.
- Use the Optimize button to improve your instructions automatically with clear reasoning provided for any changes made.
- Test instructions in draft mode before publishing; previously published instructions remain live until the new version is approved.

All Products

All Plans

Public Beta

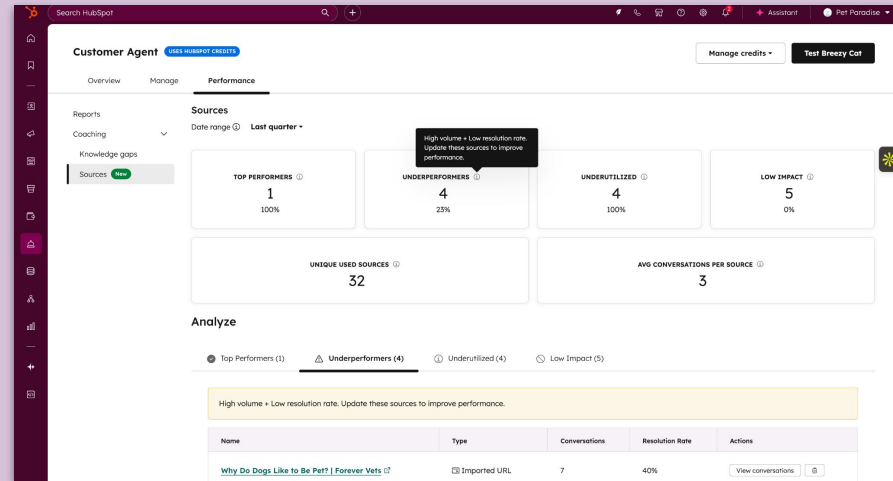
Launch region: Global



# Customer Agent Source Performance Reporting

Source Performance Reporting ties Customer Agent outcomes like resolutions, conversions, and CSAT directly to the knowledge sources that drove them.

- See exactly which articles, files, and help docs are helping or hurting your agent's performance.
- Drill into individual conversations linked to a source, then take direct action to edit or remove content based on performance data without switching tools.
- Make data-driven decisions, prioritize updates, and continuously improve agent effectiveness.



[All Products](#) [Professional+](#) [Live](#)

Launch region: Global

# Rotate Record to Owner Action in Conversation-based Workflows

The existing Rotate Owner action is now available in conversation-based workflows, automatically moving conversations to a target inbox and assigning them to the right user or team while respecting inbox permissions.

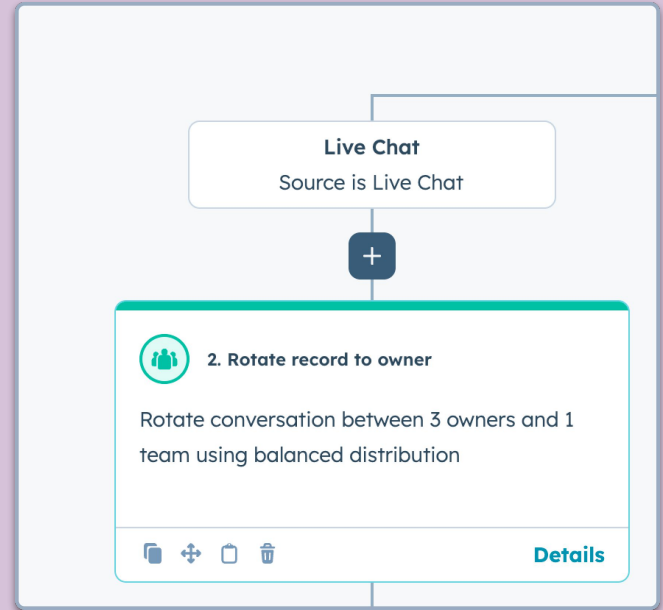
- Automate conversation handoffs between inboxes by selecting a target inbox and assignment method directly from the CRM action list in workflows.
- Conversations are only routed to users who have access to the target inbox, ensuring compliant and accurate ownership assignment.

Service Hub

Professional+

Public Beta

Launch region: Global



# SurveyMonkey App: Sync Data to HubSpot Surveys

The SurveyMonkey integration now syncs survey responses as native HubSpot feedback objects, making that data available across workflows, reporting, segmentation, and AI features.

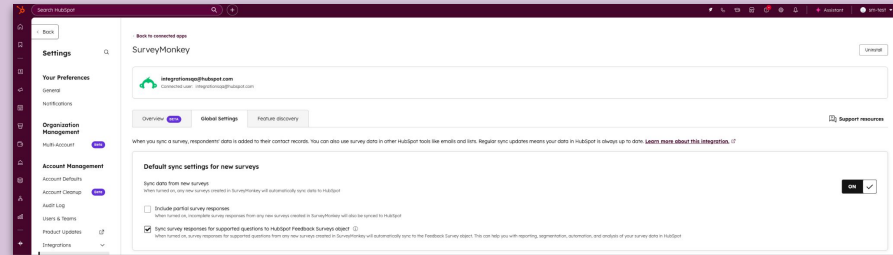
- Analyze your SurveyMonkey response data using Breeze AI, unlocking insights that were previously trapped in activity timelines.
- Trigger HubSpot workflows based on SurveyMonkey survey responses to automate follow-up actions.
- Build reports in HubSpot using SurveyMonkey data.

Service Hub

Professional+

Live

Launch region: Global



# Notes in Help Desk (Replacing Comments)

Help Desk now uses HubSpot notes as the primary way for support teams to communicate internally on tickets, replacing comments.

- Notes created in Help Desk now sync with the ticket record, eliminating the confusion of disconnected "comments" in Help Desk vs. "notes" in the CRM.
- Teams can now add notes on tickets with no customer-facing thread.

Service Hub

Professional+

Live

Launch region: Global

The screenshot displays a HubSpot Help Desk ticket interface. At the top, the ticket title is "Issue with Order #123456" and the customer is identified as "Johnnie McLaughlin". The SLA status is "SLA paused". The main content area shows an email thread from "support-1@servicehub.com" dated January 8, 2026. The email text discusses a custom leather wallet order that was damaged and requests a refund. Below the email, a note is added by "Rose Sail" on January 18, 2026, at 3:04 PM, stating "Refund request submitted to billing team on 1/8. cc @Antoinette Hocbo". The interface includes a "1 comment" link and a "Note" tab. At the bottom, there is a "Create note" button and a section for "Associated with 1 record".

# Segment Membership in Events for Health Scoring

Health Scoring now supports segment membership as an event scoring criterion, letting you build advanced AND/OR logic across properties and events without relying solely on workflow enrollment.

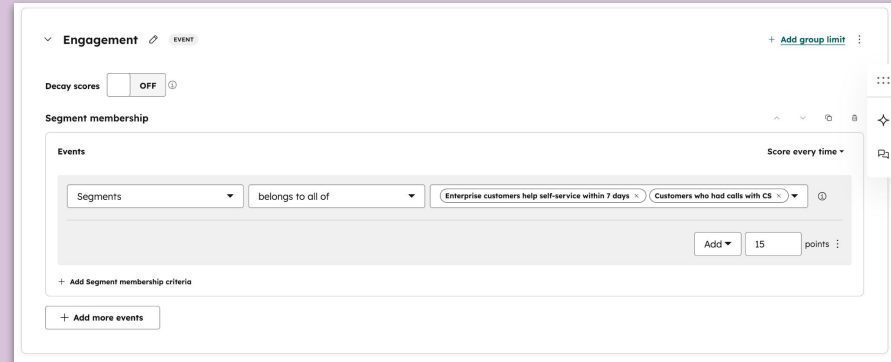
- Build complex scoring rules by combining segment membership with other event criteria using AND/OR logic across properties and events.
- Score integration events and property-based behaviors by treating them as segments within an event group.

Service Hub

Professional+

Live

Launch region: Global



# Transfer Inbound and Outbound Calls Across Workspaces

Reps can now transfer both inbound and outbound calls to individual team members or across workspaces (for example, from Help Desk to Inbox) directly within HubSpot calling.

- Transfer any active call (either inbound or outbound) to the right person without putting the customer through a separate process.
- Route calls between workspaces when a different team is better suited.

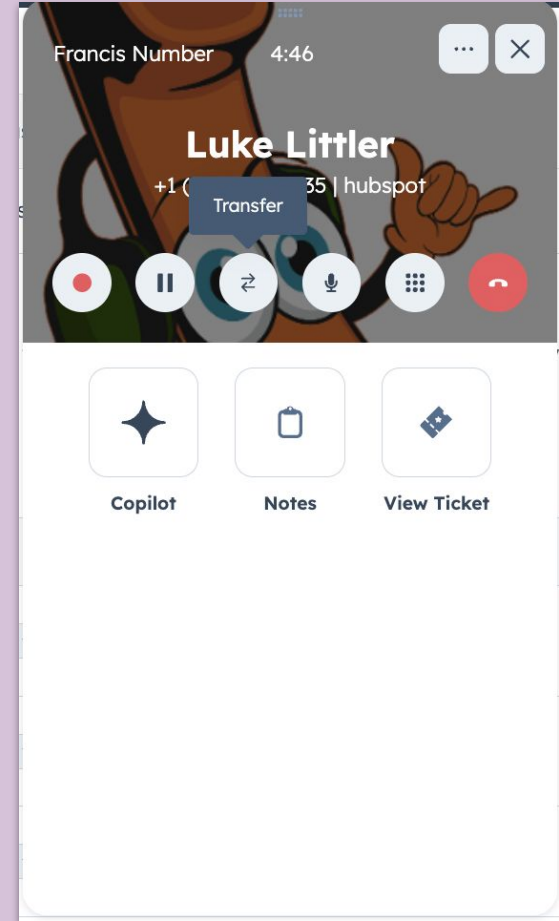
Service Hub

Sales Hub

Professional+

Public Beta

**Launch region:** Global



What's New for  
Admins & Operations



# Team Import for Scalable Org Management

Admins can now bulk-create HubSpot teams and nested team hierarchies by uploading a CSV, replacing the manual one-by-one process that could take days for large organizations.

- Create hundreds of teams and nested hierarchies in minutes by uploading a structured spreadsheet.
- Model complex org structures accurately in HubSpot, overcoming limitations with SCIM and existing user imports that don't support full team hierarchies.

All Products

Professional+

Public Beta

Launch region: Global



# HubSpot Developer MCP Server (Local)

The HubSpot Developer MCP (Model Context Protocol) Server is now generally available, letting developers build, test, and deploy HubSpot integrations and CMS content using natural language prompts inside AI-powered coding tools.

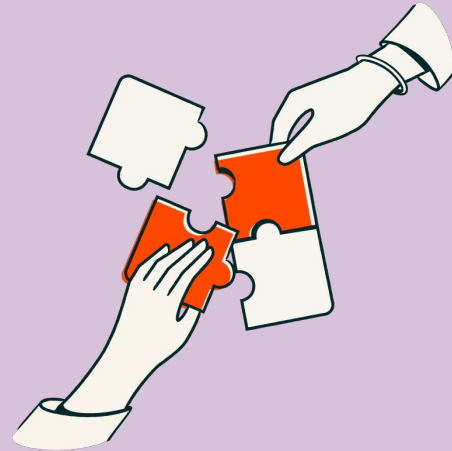
- Scaffold apps, manage CMS content, and troubleshoot serverless functions using natural language inside VS Code, Cursor, Claude Code, Gemini CLI, Codex CLI, or Windsurf without context-switching between tools.
- The MCP server provides your AI copilot with direct access to your HubSpot developer environment, reducing repetitive setup and improving build quality.

All Products

All Plans

Live

Launch region: Global





# Credit Memos QuickBooks Online Data Sync

Credit memo sync for QuickBooks Online now syncs credit memos bidirectionally between HubSpot and QuickBooks Online in near real time.

- Eliminate duplicate data entry. Credit memos created or edited in either HubSpot or QuickBooks Online automatically appear in the other system within minutes.
- Choose your sync direction (bidirectional or one-directional) to match your team's workflow via Data Sync QuickBooks Online settings.
- Includes line items, discounts, automated sales tax, and invoice applications.

All Products

All Plans

Public Beta

Launch region: Global

The screenshot shows the configuration interface for syncing QuickBooks Online Credit Memos with HubSpot. It is divided into four steps: 1. Configure, 2. Limit, 3. Organize, and 4. Review. The 'Sync direction' section shows a bidirectional sync between QuickBooks Online Credit Memos and HubSpot Credit Memos. The 'Data conflict resolution' section is set to 'Use QuickBooks Online data'. The 'Mapped fields' section shows a table of field mappings.

**Sync direction**

QuickBooks Online Credit Memos ↔ HubSpot Credit Memos

**Data conflict resolution**

Choose which app will overwrite the other when it's unclear which app has the most up-to-date information.

Use QuickBooks Online data

Data conflicts most often happen during the first sync. If there are no conflicts, we'll use your field mapping rules to decide what data should sync. [Learn more](#)

**Mapped fields**

Field mappings connect individual fields with matching information from each app. You can turn off the default mappings we've created for you, or create new custom mappings that are unique to your business. [Learn more](#)

Search All mappings

STATUS	QUICKBOOKS ONLINE	HUBSPOT	MAPPING TYPE	ACTIONS
✓	No.	Number	Default	Actions ✓
✓	Status	Credit memo status	Default	Actions ✓
✓	Discount	Order level discounts total	Default	Actions ✓
✓	Currency	Currency *	Default	Actions ✓
✓	Remaining Credit	Amount remaining	Default	Actions ✓
✓	Total	Amount excluded <a href="#">See more</a>	Default	Actions ✓

+ Add a mapping

# What's New for All Teams



## Email Object in Workflows

HubSpot Workflows now supports the 1:1 Email object as a trigger and action source, allowing teams to automate internal processes based on email creation events and properties.

- Trigger workflows directly from email events (e.g., when an email is created) by selecting the Email object when creating a workflow from scratch.
- Use standard workflow actions after the trigger to build repeatable internal email management processes.
- The Email object can also be accessed from within another object-based workflows, not just standalone email workflows.

Marketing Hub

Sales Hub

Service Hub

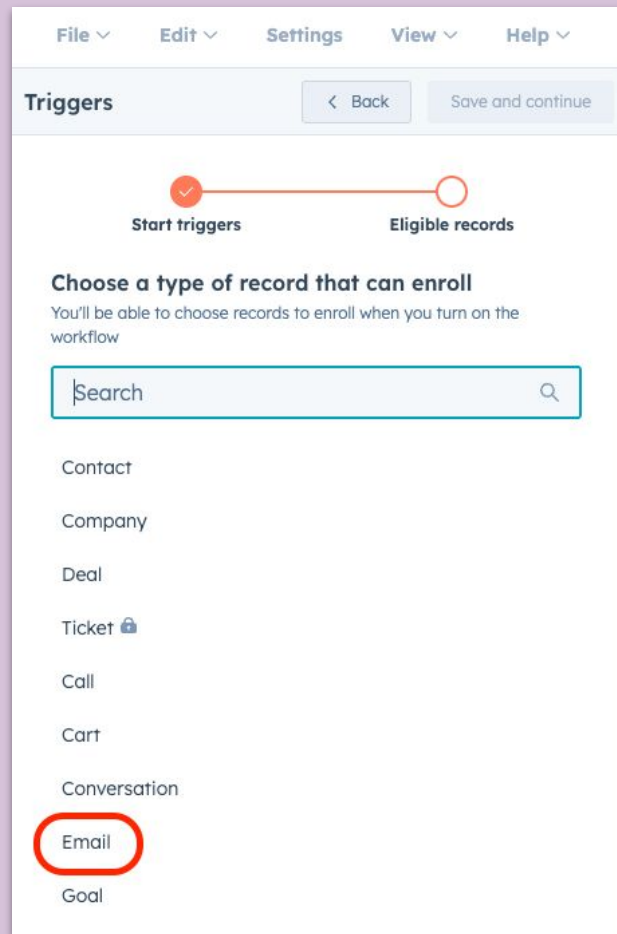
Content Hub

Data Hub

Professional+

Live

Launch region: Global



# HubSpot Connector for Claude: CRM Write Access and Engagement History

The HubSpot connector for Claude can now create and update CRM records, log activities, and surface insights from your full engagement history (emails, calls, meetings, tasks, and notes).

- Create contacts and deals, update deal stages, log call notes, and assign tasks using natural language prompts without switching back to HubSpot.
- Access complete engagement history so Claude can provide context-aware recommendations.
- All create and update actions are attributed in your HubSpot Audit Log; Claude cannot delete records. Bulk actions support up to 10 records per request.

All Products

All Plans

Live

Launch region: Global

Perfect! I've successfully completed all the tasks for your deal with Redwood Precision Components:

✅ **Deal Created:** [Redwood Precision Components - Boston Office](#)

- Amount: \$3,000
- Stage: Appointment Scheduled
- Associated with Olivia Chen and Redwood Precision Components

✅ **Notes Added:** Documented your successful call discussing the Boston office requirements

✅ **Line Items Added:**

- 10 × Motion Sensor (PoE) @ \$100 each = \$1,000
- 10 × Wall Thermostat Pro @ \$200 each = \$2,000

✅ **Follow-up Task Created:** High-priority task due January 18, 2026 to follow up with Olivia Chen on next steps and timeline

Everything is now set up in HubSp



# Updated Breeze Assistant Prompts

Breeze Assistant now includes @Mentions for CRM object search, a saved prompts library with reusable templates and placeholders, and categorized prompt suggestion buttons, making it faster to write effective prompts and discover what Breeze can do.

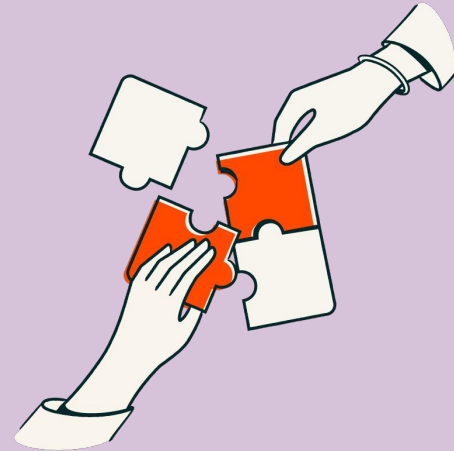
- Reduces time wasted on retyping effective prompts.
- Helps you discover Breeze capabilities through intelligent suggestions.

All Products

All Plans

Live

Launch region: Global



## HubSpot Link Previews in Slack

When a HubSpot record link is pasted into Slack, it now automatically unfurls into a structured, context-rich preview showing key CRM fields with no extra clicks required.

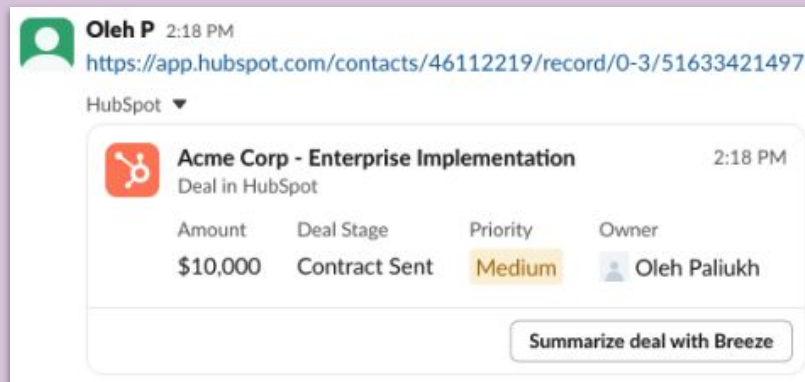
- Previews are automatically generated for Deals, Tickets, Companies, Contacts, Emails, Blog Posts, Reports, and Dashboards.
- Clicking the preview opens a pane in Slack that displays full record details and related threads so teams can get context without switching tools.
- Note: Requires the HubSpot Slack integration to be connected.

All Products

All Plans

Live

Launch region: Global



The screenshot shows a Slack message from a user named 'Oleh P' at 2:18 PM. The message contains a HubSpot link: <https://app.hubspot.com/contacts/46112219/record/0-3/51633421497>. Below the link is a HubSpot preview card. The card has a 'HubSpot' label with a dropdown arrow. The main title is 'Acme Corp - Enterprise Implementation' with a timestamp of '2:18 PM'. Below the title is the subtitle 'Deal in HubSpot'. The card displays a table of deal details:

Amount	Deal Stage	Priority	Owner
\$10,000	Contract Sent	Medium	Oleh Paliukh

At the bottom right of the preview card is a button that says 'Summarize deal with Breeze'.

Want to Learn More?



## What's New at HubSpot?

Your go-to place to learn all about HubSpot's newest releases!

## Community

Visit our Community to read our Product Updates blog and join our top discussions with other customers!



Thank You

HubSpot