

# HubSpot Product Updates

September 2023 (July & August 2023 Updates)

## Product Update of the Month

# Support Assistant

We're excited to announce the release of content assistant for the Conversations Inbox composer in all channels! With content assistant, users can do everything from generating responses to customer inquiries to editing existing or generated text by opting to rewrite, shorten, expand, or change the tone of the text they select.

Conversations across all channels, except for WhatsApp, in active threads can also be summarized in the comment section. This feature creates a conversation summary so any inbox user can quickly get the context of a conversation without reading every message.

Free

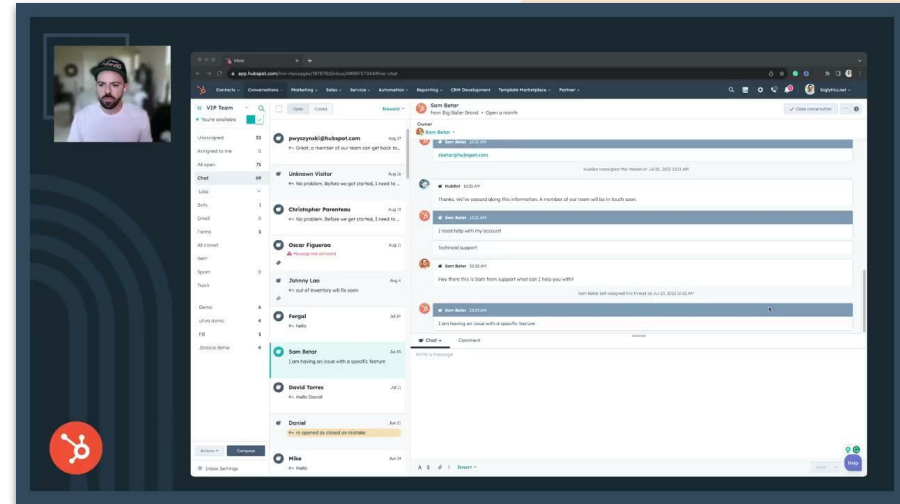
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Public Beta

Launch region: Global



 Marketing Hub™ +  CMS Hub®





# AI Content Assistant for Social on mobile

Creating social post captions from HubSpot's mobile app has never been SO EASY!

iPhone and Android users can now boost their efficiency in publishing social media on the go by leveraging AI to help them compose post captions easier and faster.

## Use Case

Using the AI content assistant will enable you to write social posts more quickly and with ease on the go. AI content assistant automates the tedious parts of writing, leaving you with more time to shape your own thoughts, opinions, and creativity into your content.

[Learn More](#)

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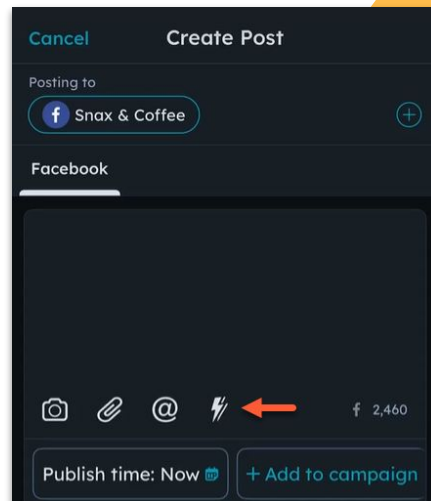
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# Ad Tracking for LinkedIn Carousel Ads

HubSpot can now track LinkedIn carousel ads - this means if a contact clicks on your LinkedIn carousel ad, an ad interaction will go on the contact record, allowing you to create specific email follow ups to close that lead. It also enables you to see full ROI reporting if that contact goes on to have a deal.

## Use Case

Previously due to API limitations, HubSpot could not track LinkedIn carousel ads. But now that limitation is gone and you should start to see your live LinkedIn carousel ads start tracking within the Ads app. This change enables you to see all the great reporting you can see for your other tracked LinkedIn ads (Cost Per Lead, Number of Contacts, etc) as well as have the Ad Interaction on the Contact Timeline allowing you to create lists, emails, workflows, etc based on this ad interaction.

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# New email templates available for ecommerce

You can now access three newly updated email templates, uniquely designed for ecommerce – a welcome email, re-engagement email, and new product launch email. These templates can be accessed by all customers in the marketing email template library.

## Use Case

- A **welcome email** to greet new customers. Customize the template with branding, discount codes, product recommendations, and more! Use this email template with a workflow or send it to a segmented list of customers.
- A **re-engagement email** reminds a customer about your brand, product, or offer, especially if you haven't interacted in a while.
- A **product launch email** serves as an announcement or notification to your customers about a new offering, feature, or update.

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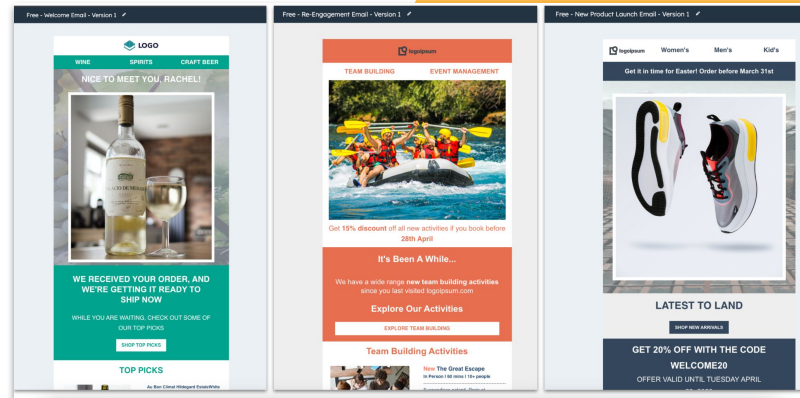
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# Drag and Drop Version of the Collaboration Sidebar in Marketing Email

Following the release of the drag and drop version of the collaboration sidebar in Workflows and Dashboards, we are now adding this drag and drop version into the Marketing Email tools.

## Use Case

This new moveable version gives users the ability to choose where on the screen the sidebar should be placed.

Additionally, the sidebar took up the full height of the screen. We wanted to optimize how we use the space by introducing a smaller, draggable version of the sidebar, which can be placed on any edge of the screen.

[Learn More](#)

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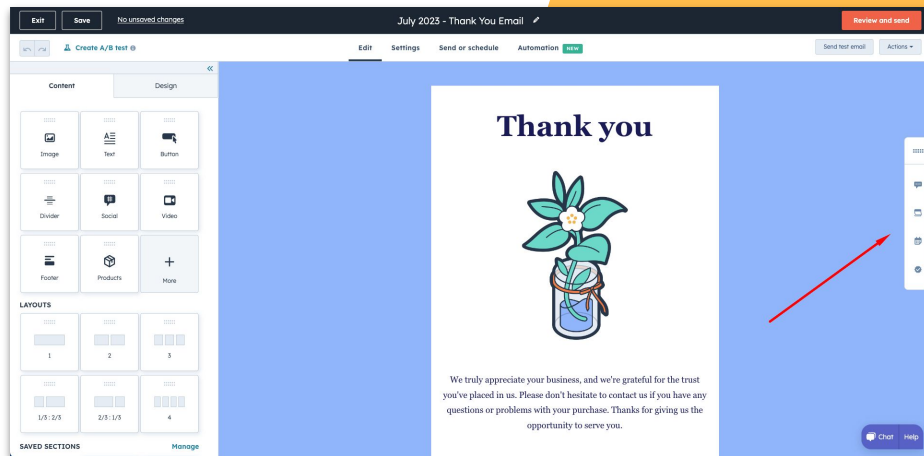
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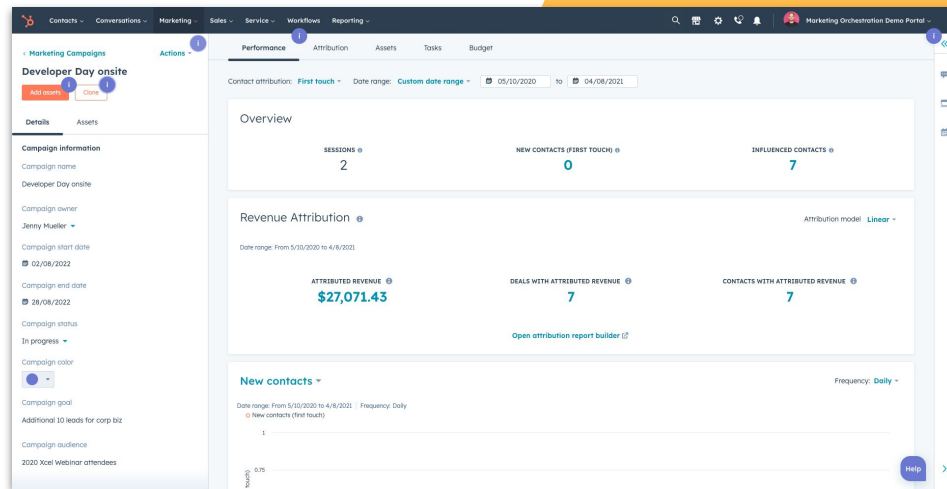


# New Campaign Details Page Layout

A new page layout for the details page for individual campaigns taking better advantage of the screen real-estate, providing more information on screen at any time and introducing inline editing of campaign properties.

## Use Case

With this update you can now access all your properties, both default and custom, from the left-hand sidebar and edit them inline quick and easy.



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# Timeline of Changes Made to a Marketing Campaign

You can now visualise a chronological timeline of all changes made to a marketing campaign using the new "Activity" tab in the marketing campaigns tool. This tab displays a list of changes, including edits to the campaign itself, assets associated to the campaign, and more, in order from newest to oldest. Similar to the Activity tab on a contact, company or deal, you can view the author of the change and filter by the type of activity to drill down to find exactly what you're looking for.

## Use Case

With this update, starting in Marketing Campaigns, we're providing much more transparency into what's changing and by who giving marketers a much deeper understanding into what their peers are working on and visibility into workloads.

[Learn More](#)

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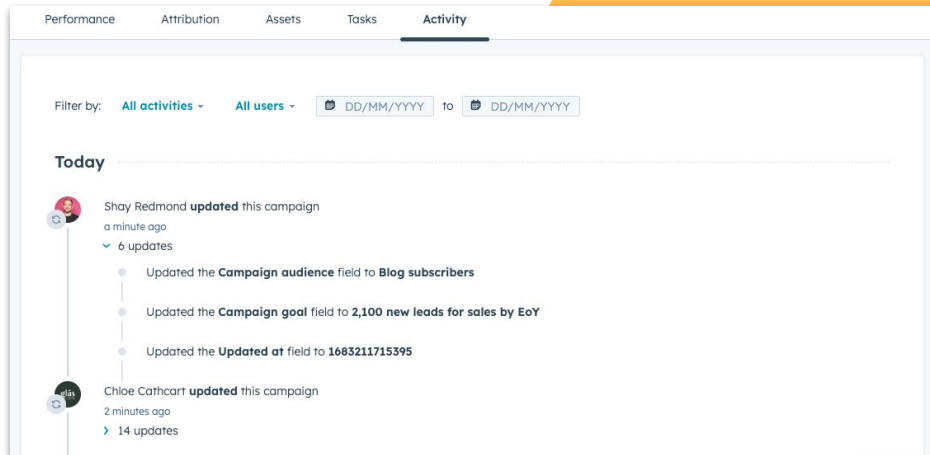
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# AI Assistant: Highlight Commands in Social

Highlight commands is an AI assistant feature that helps marketers edit and create social captions with ease. It allows marketers to rewrite, summarize, expand on, or change the tone of voice of social captions. By selecting specific portions of the text, marketers can effortlessly rephrase sentences, condense information, add context, or adapt the tone to suit different audiences.

## Use Case

We added highlight commands to rewrite, shorten, expand and change the tone of voice of social media posts to help marketers save time and improve efficiency.

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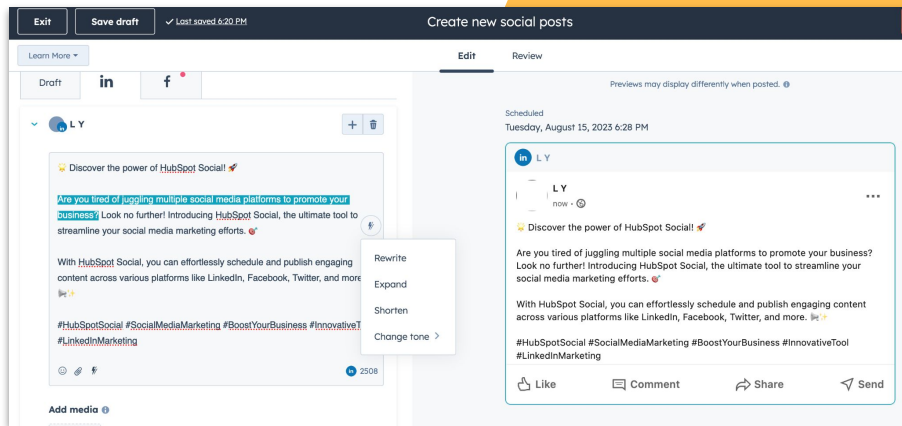
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# AI Assistant: Create Social Posts from Blogs

Introducing AI-assisted blog summarization into social posts. Marketers can now summarize blog content into social media posts across all networks.

## Use Case

Content creation is key part of the social marketers day to day process, however teams often struggle to create new and exciting content that engages audiences, while still maintaining their brand messaging across various marketing channels. This feature enables customers to create social posts based on blog content with ease.

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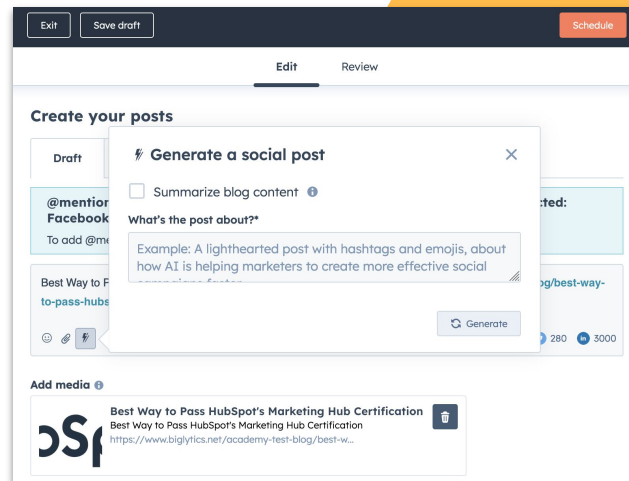
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# New Module Categories Now Available in Website Editor

In the HubSpot drag-and-drop website editor, modules are now organized by functionality – categories like text, media, commerce, forms and buttons, and more. Modules are a simple way to stand out with reusable building blocks that add more custom functionality to your website, landing page, or blog.

## Use Case

This more organized way of building content will help you create engaging web designs, from modules that support interactive videos to seamless payments, and everything in between.

[Learn More](#)

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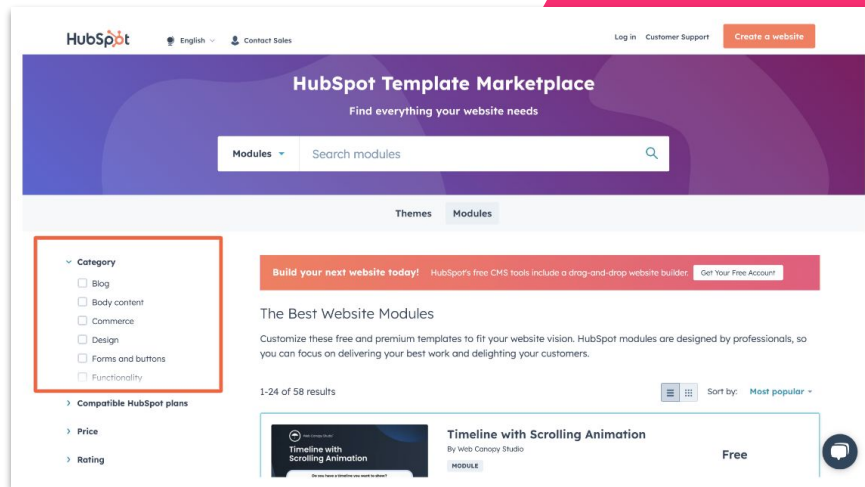
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# Improved H1 Recommendation Fixes

We improved the SEO recommendation "Page has a single H1 tag" to make it easier than ever to resolve SEO issues. Now, you can automatically delete extra H1 tags or convert them to H2 tags with just a few clicks.

## Use Case

With this new update, you can easily review each of your H1 tags on a page if you have more than one, delete excess H1 tags, or convert them to H2s.

*\*Note: this feature is only available inside of the new Patagonia editor (beta)*

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### ✔ Page has a single H1 tag

A single H1 tag makes it easier for search engines and readers to understand your content. Your page has 4 H1 tag(s). [Learn more about H1 tags](#)



#### These are the H1 elements in the page:

- Micro-Influencers: The Secret Weapon of Social Media Marketing. *in page title*
- The Role of Micro-Influencers in Social Media Marketing. [Change to H2](#)
- What are Micro-Influencers? [Change to H2](#)

# New Growth Theme Sections

We've made an update to the Growth Theme with the addition of seven new sections. These sections have been carefully crafted to simplify your experience by allowing you to seamlessly drag and drop pre-designed, full-width sections directly onto your page. With options like gallery, products, services, newsletter, and about, these new sections offer unparalleled flexibility and convenience for creating stunning, user-friendly websites.

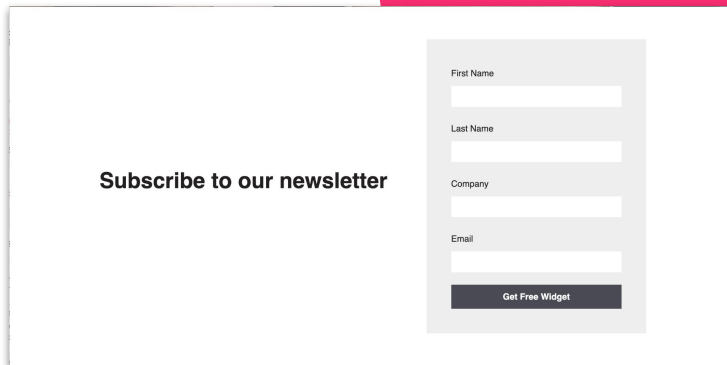
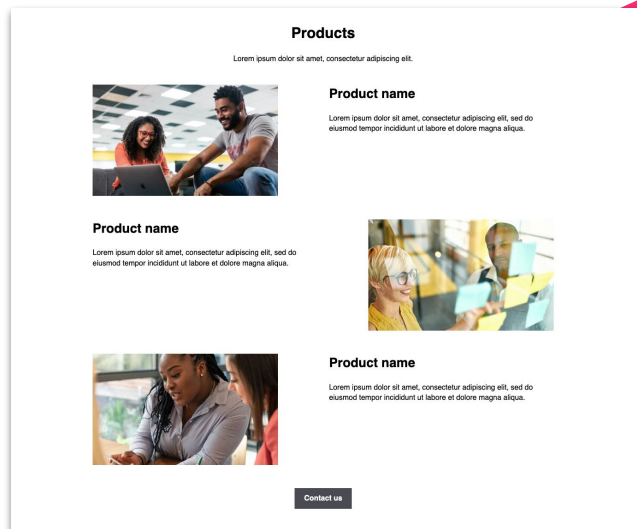
## Use Case

Whether you are looking to showcase your products, promote your services, or engage with your audience through a captivating newsletter, these new sections will empower you to create impactful web pages easily. We believe that this update will not only save you time and effort but also enable you to take your website design to the next level.

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*\*Users need to have the Growth set as their “active” theme to see the sections on their Website Builder*



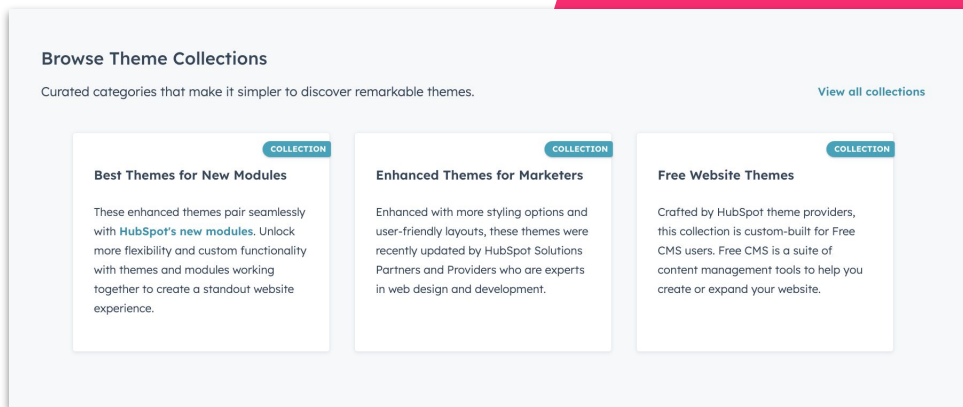


# A new way to discover featured themes on the Template Marketplace

Exploring recommended themes on the [Template Marketplace](#) just got a whole lot easier! You can now view all featured themes on both the Template Marketplace homepage and a new page dedicated to all theme collections.

## Use Case

Before redesigning the Template Marketplace, collections were hard to find and limited in their display. Now, with a carousel added to the Template Marketplace homepage and a new page dedicated to viewing all collections, you can quickly browse featured themes in just a few clicks.



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## Save SEO Table Report to Dashboards

Users can now save the table report in the "Analyze" tab in HubSpot's SEO tool to their custom reporting dashboards. This report shows how pages are performing for Google Search Console metrics (average position, clicks, clickthrough rate, impressions) over time

### Use Case

This change allows users to keep all of their web reporting reports inside of one convenient dashboard.

*\*available for all portal editions with access to SEO Analytics*

Date

**Pages** Save report

Date range: From 6/1/2023 to 8/7/2023

	URL	IMPRESSIONS ↕	CLICKS ↕	POSITION ↕	CLICKTHROUGH RATE ↕
<input type="checkbox"/>	<a href="https://www.amandadanielson.us/">https://www.amandadanielson.us/</a>	88	6	6.47	6.82%
<input type="checkbox"/>	<a href="https://blog.amandadanielson.us/?hsLang=en">https://blog.amandadanielson.us/?hsLang=en</a>	5	0	5	0%

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## Add Google as Domain Connect Provider

HubSpot currently supports two Domain Connect providers: GoDaddy and IONOS (used by ~27% of users). We will be focusing on adding Google Domains as a Domain Connect provider. Google Domains is our customers' fourth most commonly used domain registration service, used by ~6.4% of customers.

This will make it easier for customers who have Google domains to connect them in HubSpot.

### Use Case

We want to offer a Domain Connect integration with Google as a domain connect provider on top of GoDaddy, and IONOS to increase the percentage of CMS Free users who connect a custom domain.

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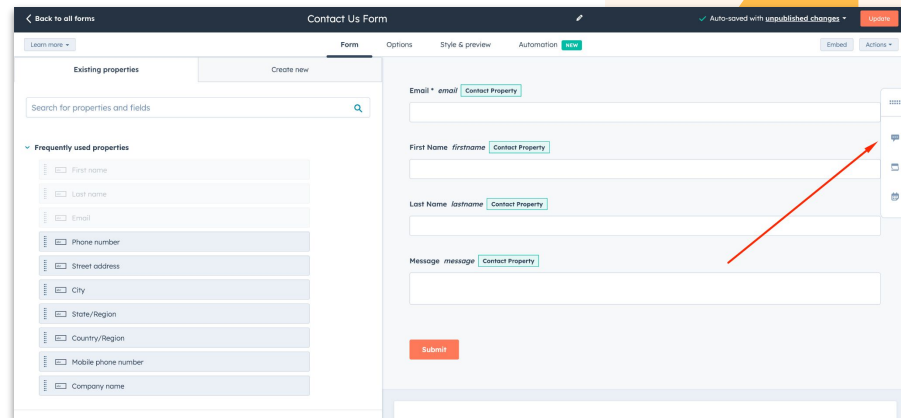
# Drag and Drop Version of the Collaboration Sidebar in Forms

Following the release of the drag and drop version of the collaboration sidebar in Workflows, Dashboards and Marketing Email, we are now adding this drag and drop version into Forms.

## Use Case

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Additionally, the sidebar took up the full height of the screen. We wanted to optimize how we use the space by introducing a smaller, draggable version of the sidebar, which can be placed on any edge of the screen.



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# Update the Approvers in Active Approvals

Admins and the user who made the request can now update the approvers of an active approval. That's available for portals that have turned on approvals for marketing emails, website pages, landing pages, or blog posts.

## Use Case

HubSpot users want to make sure an approval request doesn't get blocked when an approver is unavailable. This new feature brings more flexibility, letting admins and the user who made the request choose other approvers to review and approve the request.

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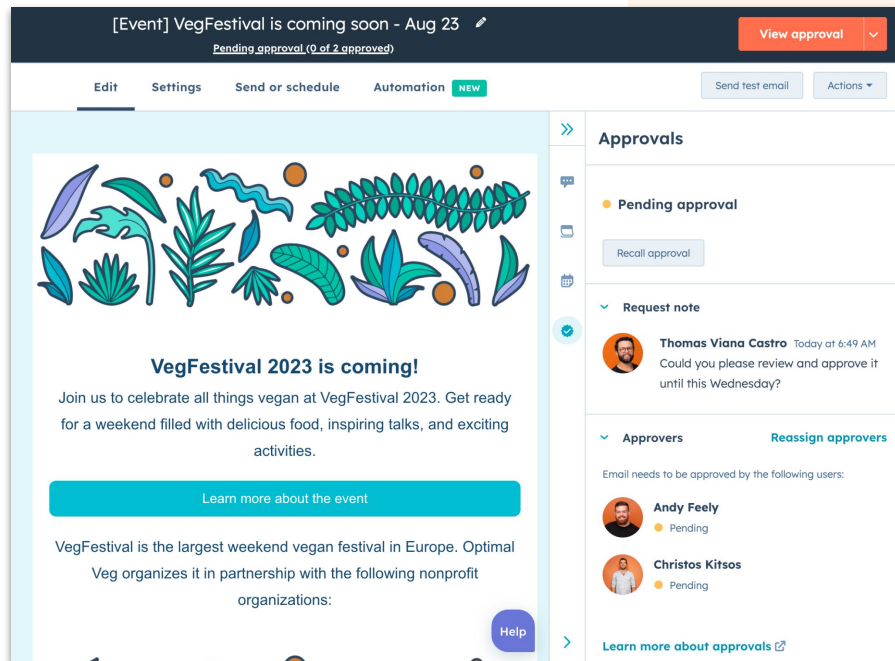
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## Logo Grid Default Module

HubSpot's new default module enables customers to add logos of various dimensions in a grid format on their pages and blogs.

### Use Case

This is the first default module that allows customers to easily size and display multiple logos of different dimensions in a grid format. It helps create professional-looking content more quickly.

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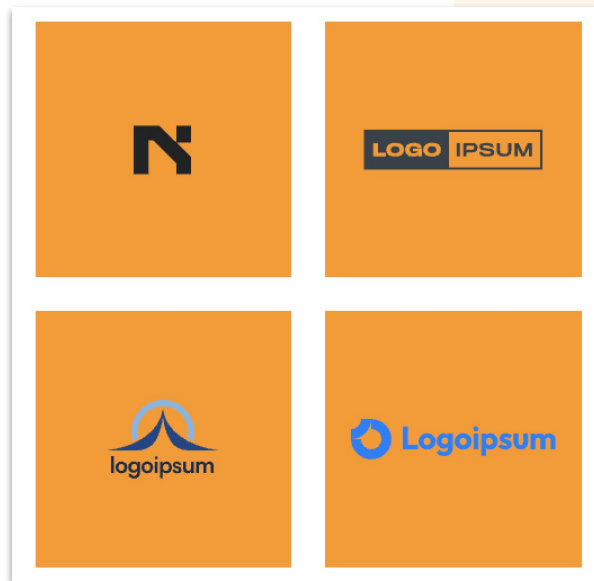
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# The Campaign Template Library Now Offers 10 New HubSpot Templates

The campaign templates library now features 10 new out-of-the-box HubSpot campaign templates, making it even easier for you to create successful multi-channel campaigns in HubSpot:

- |    |                           |     |                      |
|----|---------------------------|-----|----------------------|
| 1. | Abandon cart              | 6.  | Nurture              |
| 2. | Email drip campaign       | 7.  | Onboarding & welcome |
| 3. | In-person event promotion | 8.  | Product launch       |
| 4. | Internal newsletter       | 9.  | Product sale         |
| 5. | Loyalty program           | 10. | Re-engagement        |

[Learn More](#)

Free

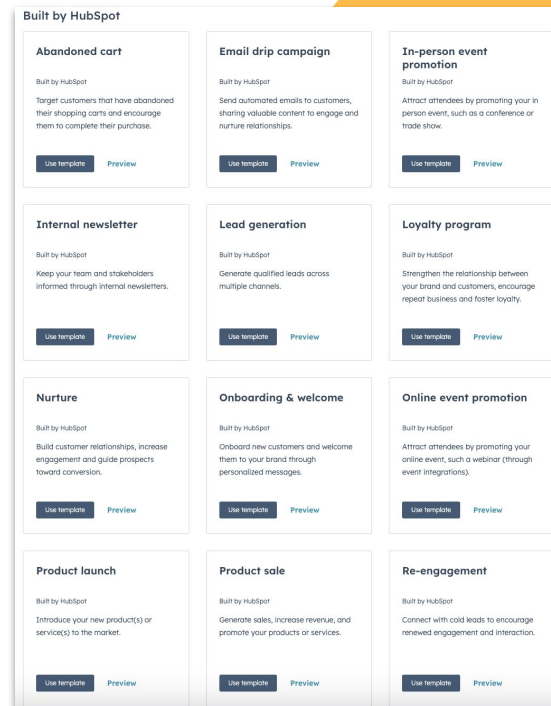
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# Google Enhanced Conversions

Google enhanced conversions is an ad conversion events feature that can improve the accuracy of your conversion measurement and unlock more powerful bidding. It supplements your existing conversion tags by sending hashed first-party conversion data from your website to Google in a privacy-safe way. The feature uses a secure one-way [hashing algorithm](#) called [SHA256](#) on your first-party customer data, such as email addresses, before sending to Google.

## Use Case

With enhanced conversions, HubSpot will send onsite form fill submission data back to Google server side. This will:

- Recover conversions that otherwise wouldn't have been measured
- Improve bidding optimization through better data
- Be privacy safe with hashing of first-party customer data

[Learn More](#)

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Create event

Help ad networks optimize the delivery of your ads by letting them know when an event occurs on a contact record, such as when their lifecycle stage changes, or when they make an in-store purchase.  
[Learn more about syncing ad optimization events.](#)

Ad network

Google Ads

Ad account

HubSpot Ads testing (678-461-6772) X

Event trigger

☐ Lifecycle stage change ⓘ

☒ Form submission NEW  
[Using Enhanced Conversions](#) ⓘ

**To create this event, you must accept Google's customer data terms.**

[Sign in to Google Ads](#) ⓘ then read and accept the terms.

By using this feature, you also agree to comply with [Google's Customer Data Policies](#). ⓘ

# Create Ad Goals within Ads

Introducing the ability to create ad goals from within the Ads tool! You can now create four different ad goals and track their progress from the Analyze tab within Ads:

1. Contacts from first form submission
2. Cost per contact in a lifecycle stage
3. Network conversions
4. Number of contacts in a lifecycle stage

## Use Case

Keep track of these important Ad goals right beside all of your important reporting within HubSpot.

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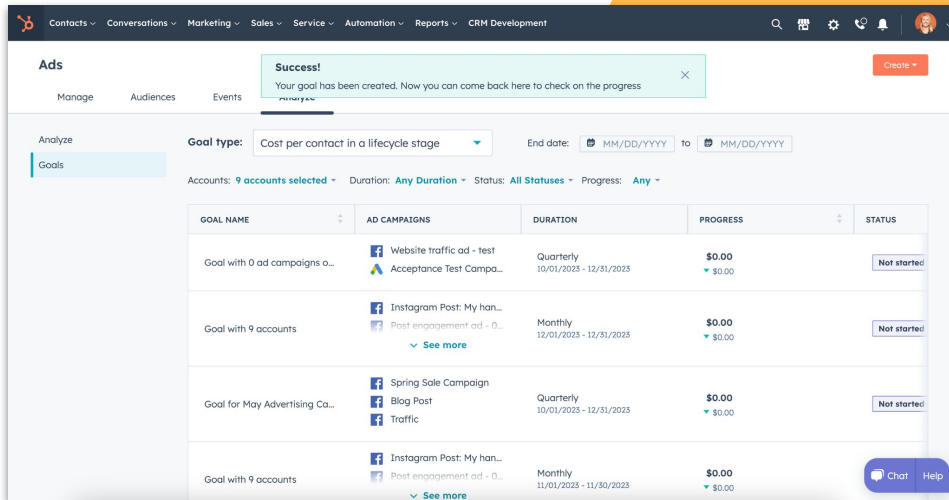
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*\*recently released as Public Beta in May*



Success! Your goal has been created. Now you can come back here to check on the progress

Goal type: Cost per contact in a lifecycle stage

End date: MM/DD/YYYY to MM/DD/YYYY

Accounts: 9 accounts selected Duration: Any Duration Status: All Statuses Progress: Any

GOAL NAME	AD CAMPAIGNS	DURATION	PROGRESS	STATUS
Goal with 0 ad campaigns o...	Website traffic ad - test Acceptance Test Campa...	Quarterly 10/01/2023 - 12/31/2023	\$0.00 ▼ \$0.00	Not started
Goal with 9 accounts	Instagram Post: My han... Post engagement ad - 0... <a href="#">See more</a>	Monthly 12/01/2023 - 12/31/2023	\$0.00 ▼ \$0.00	Not started
Goal for May Advertising Ca...	Spring Sale Campaign Blog Post Traffic	Quarterly 10/01/2023 - 12/31/2023	\$0.00 ▼ \$0.00	Not started
Goal with 9 accounts	Instagram Post: My han... Post engagement ad - 0... <a href="#">See more</a>	Monthly 11/01/2023 - 11/30/2023	\$0.00 ▼ \$0.00	Not started



## A New Set of Default System Pages and an Easier Way to Preview Them

There's a new, consistent and modern set of default system pages and emails for CMS Hub, Marketing Hub and Service Hub users, along with an easier way to view the system pages users have set.

### Use Case

This new set of consistently styled and neutrally branded set of system templates and emails are set automatically for users that way, users can get their website up and running quickly while being confident that their system pages look professional.

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# New CTAs Available in Marketing Email

You can now add new CTAs to your Marketing Emails.

## Use Case

With the addition of the new CTAs to marketing email, you can now track the effectiveness of your offer across multiple touchpoints in a scalable way without having to worry about rendering issues (new CTAs are rendered in HTML and not as an image).

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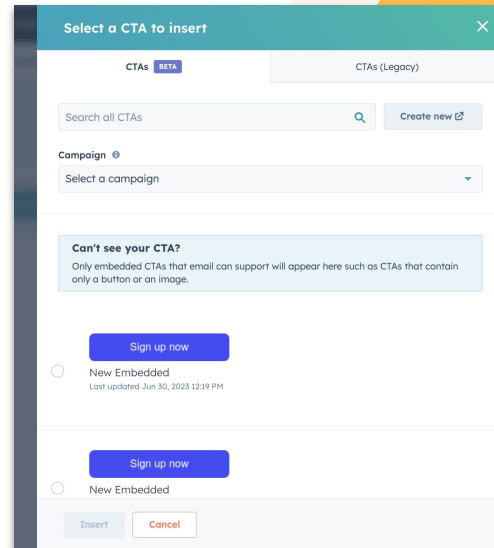
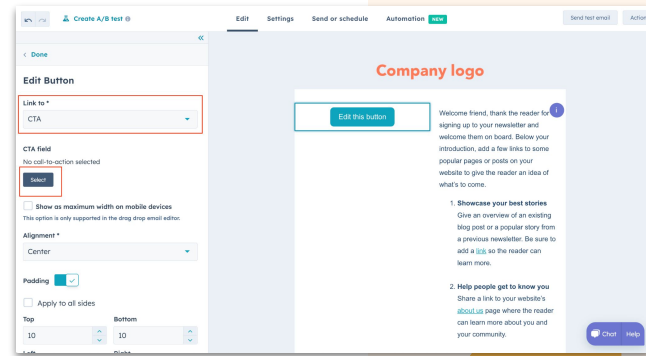
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# Content Approvals

The ability for marketers to request approval before publishing a landing page, blog post or website page.

## Use Case

Easily collaborate with other stakeholders in one place to develop content without having to go back and forth through multiple external platforms.

*\*Content Approvals for website pages are only available to CMS Hub Enterprise customers.*

[Learn More](#)

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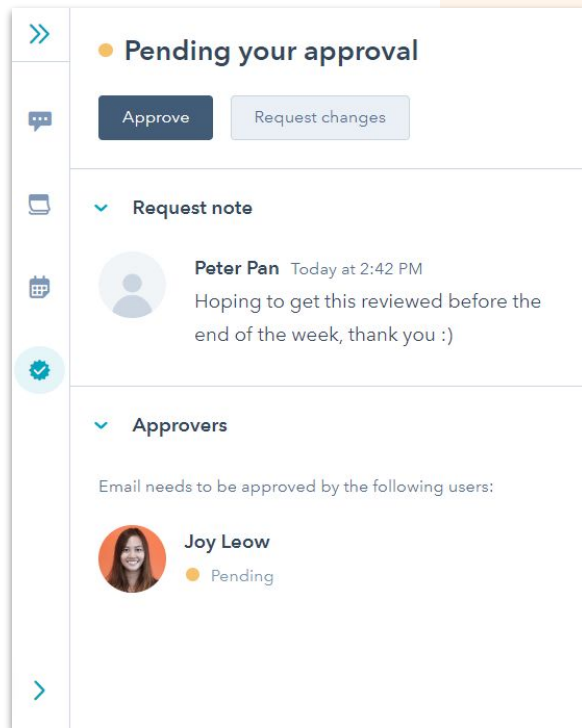
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 Sales Hub™ +  Service Hub™





# E-sign now available for Sales Hub Starter Plans

We're introducing a packaging change by providing E-Signature to our Sales Hub Starter customers.

## Use Case

Previously, Sales Hub Starter customers only had the capability to either use no signature, or "include a space for a written signature". This means they could not sign a quote digitally, which led to using offline methods to capture a signature.

The screenshot displays the 'Edit a quote' interface in Sales Hub. At the top, a progress bar shows steps: DEAL, DETAILS, BUYER INFO, YOUR INFO, LINE ITEMS, SIGNATURE & PAYMENT (current step), and REVIEW. The 'Signature and Payment' section is active, showing 'Signature options' with three radio buttons: 'No signature' (selected), 'Include space for a written signature', and 'Use e-signature' (highlighted with a green box). Below this, 'Payment options' include 'No payment' (selected), 'HubSpot Payments', and 'Stripe'. To the right, a preview of the 'Goods and Services' section is visible, showing a table with columns for Name, Quantity, Unit Price, and Total. The table contains one row for 'HubSpot Payments' with a quantity of 1 and a unit price of \$100.00. Below the table, there are fields for 'Signature' and 'Printed Name', and a 'Submit' button.

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# Deal Insights

You can now see insights on pipeline health when managing Deals. Taking a look at these insights on a weekly basis will give you an 'at a glance' view of the status of your sales pipeline and sales process.

## Use Case

To manage deals and track sales performance effectively, sales teams need visibility into the pipeline. We made deal management easier with valuable metrics on pipeline health embedded right where reps close deals. Reps can track how deals are aging and managers can see how much pipeline was created in the last week. With an improved view of your overall pipeline, you can identify valuable insights to inform team meetings, weekly 1:1's, and forecast calls.

[Learn More](#)

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The screenshot displays the 'Deals' section of the Sales Hub interface. At the top, there's a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. Below this, a summary card shows key pipeline metrics: Total Deal Amount (\$30.2M), Open Deal Amount (\$26.3M), Closed Won (\$17.5M), New Deal Amount (352), and Average Deal Age (63 days). The main table lists individual deals with columns for Deal Name, Deal Score, Close Date, Labels, Amount, Deal Stage, and Deal Owner. Each deal row includes a score bubble, a close date, a label (e.g., 'Urgent', 'In Development', 'Large deals'), an amount with a trend indicator, a deal stage with a timeline, and the assigned owner.

Deal owner	Create date	Last activity date	(1) Close date	All filters (0)	Hide insights	Save View
<strong>TOTAL DEAL AMOUNT</strong> \$30.2M Avg \$12,000 per deal						
<strong>OPEN DEAL AMOUNT</strong> \$26.3M Avg \$8,400 per deal						
<strong>CLOSED WON</strong> \$17.5M Avg \$8,400 per deal						
<strong>NEW DEAL AMOUNT</strong> 352 Avg \$6,900 per deal						
<strong>AVERAGE DEAL AGE</strong> 63 days						
DEAL NAME	DEAL SCORE	CLOSE DATE	LABELS	AMOUNT	DEAL STAGE	DEAL OWNER
Rand Enterprises	87	Jul 15, 2024	Urgent In Development	\$3,050.00 ▲ 10%	Presentation scheduled 7 days in stage	Unassigned
Dunder Mifflin	82	Jul 15, 2024	In Development Out there	\$2,000.00 ▼ -12%	Appointment scheduled 4 days in stage	Beverly Rae
Bamboo HRD	87	Jun 15, 2024	Large deals	\$8,900.00	Appointment scheduled 4 days in stage	Joe Huang
Duke and Duke	91	Jul 15, 2024		\$4,000.00	Contract sent 12 days in stage	Kate Bradley
PolyCon	81	Aug 30, 2024	In Development	\$3,800.00 ▲ 32%	Closed lost 3 days ago	Kate Bradley
Wayne Enterprises	67	Jul 15, 2024	Needs attention	\$5,900.00 ▼ -14%	Decision maker bought-in 4 days in stage	Joe Huang
Hoopers Store	82	Jul 15, 2024	Urgent	\$5,900.00 ▼ -14%	Contract sent 4 days in stage	Joe Huang
Los Pollos Hermanos	71	Jul 15, 2024		\$5,900.00 ▼ -14%	Contract sent 4 days in stage	Joe Huang
Gregarious Simulation Systems	89	Jul 15, 2024	Urgent	\$5,900.00 ▼ -14%	Contract sent 4 days in stage	Joe Huang
Macmillan Toys	73	Jul 15, 2024	Large deals Out there	\$5,900.00 ▼ -14%	Contract sent 19 days in stage	Joe Huang

# Sequences Deal Reporting

We are introducing two new metrics to help Sales Hub Enterprise customers analyze their sequence performance:

- Deal Rate - the percentage of contacts enrolled in a sequence that resulted in a deal being created
- Total Revenue - the amount of revenue from closed won deals influenced by the sequence shown in company currency

## Use Case

Sequences Deal Reporting will allow teams to tie pipeline generation and revenue to sequences. This means managers can identify what content leads to more conversions to coach reps and adjust tactics to optimize sales effectiveness.

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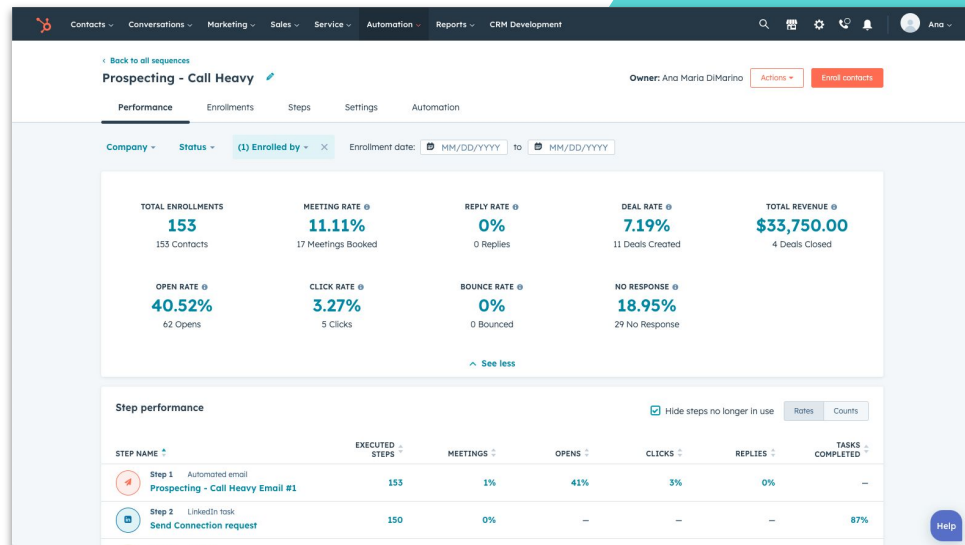
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# Deal Journey Analytics: A new report for Sales Hub Enterprise

We're adding deals to customer journey analytics. Sales Hub Enterprise customers will be able to use journey analytics to see how different deals are moving through the pipeline.

## Use Case

We have expanded the customer journey analytics app by introducing additional features, filters, and new types of data for use in journey or funnel reports. We now allow you to track deal progression across multiple pipelines.

With deal journey analytics, you can now utilize Sankey charts to visualize instances where deals bypass certain stages. This enables you to gain insights into the duration it takes for deals to move from one stage to another.

[Learn More](#)

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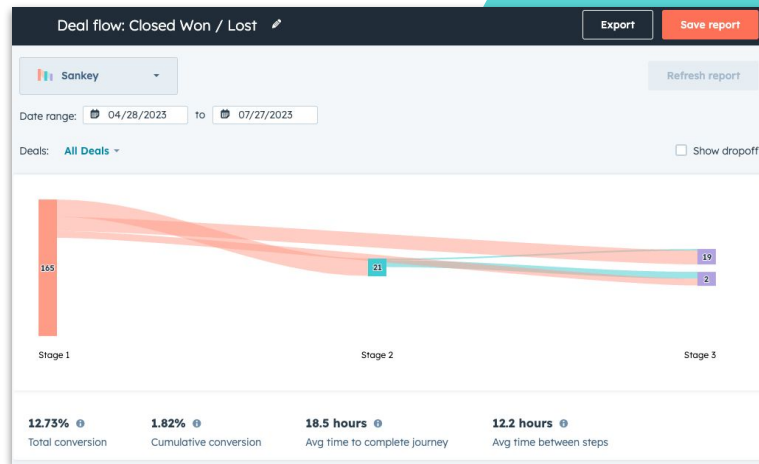
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# New Sales Report - Sales Velocity

The sales velocity report gives an overview of how well a sales team is doing. This report shows key metrics such as the number of leads generated, conversion rates, and the time it takes to close deals.

## Use Case

By measuring sales velocity, teams gain valuable insights into their performance and can make informed decisions to optimize their sales strategies. Moreover, sales velocity empowers teams to look ahead by predicting future sales revenue and customer acquisition. Understanding the conversion rate and the time it takes to convert leads into customers allows sales teams to set realistic goals and allocate resources effectively. This predictive ability enables them to plan for growth and stay competitive in a dynamic market environment, making sales velocity an indispensable tool for driving revenue growth and success.

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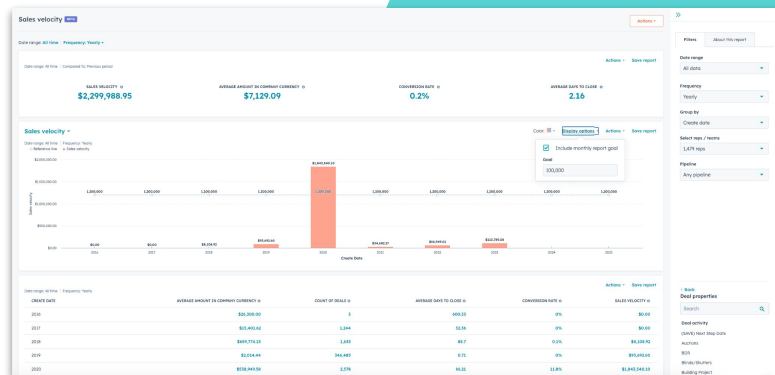
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Launch region: Global





# Forecast Accuracy Tracking

Measure the reliability of your forecasts and the effectiveness of your forecasting process with forecast accuracy tracking. With forecast accuracy tracking, you can identify trends, patterns, and factors to improve the performance of your forecasts.

## Use Case

Now with this update, we enable customers to track their forecast accuracy at the rep and team levels to make informed decisions based on data-driven insights.

Free

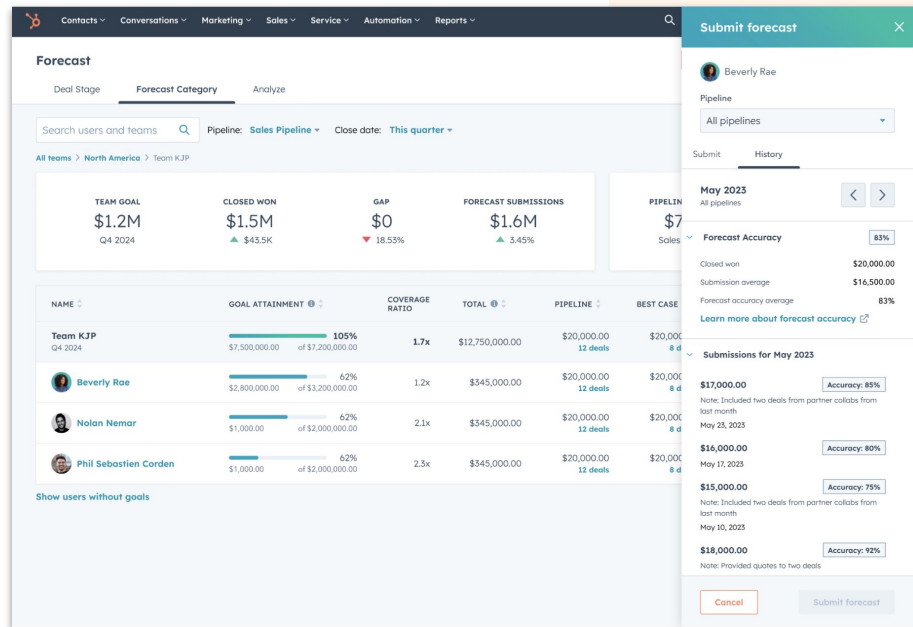
Starter

Pro

Ent

Live

Launch region: Global





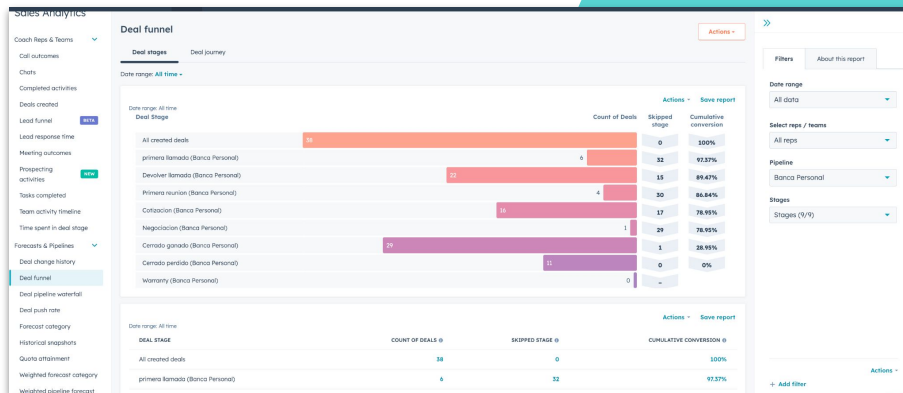
# Sales Report - Deal Funnel

We made significant changes to our funnel reporting.

1. Deal stages (previously called 'Any' funnel) got updated with skips, conversions & time in stage.
2. 'All stages in order' funnels got replaced with Deal journey and provides skips, conversions, time in stage.

## Use Case

Skips, conversions, and time in stage are essential to help sales teams make data-driven decisions and implement more targeted sales strategy improvements to increase their overall conversion rates.



Free

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Public Beta

Launch region: Global

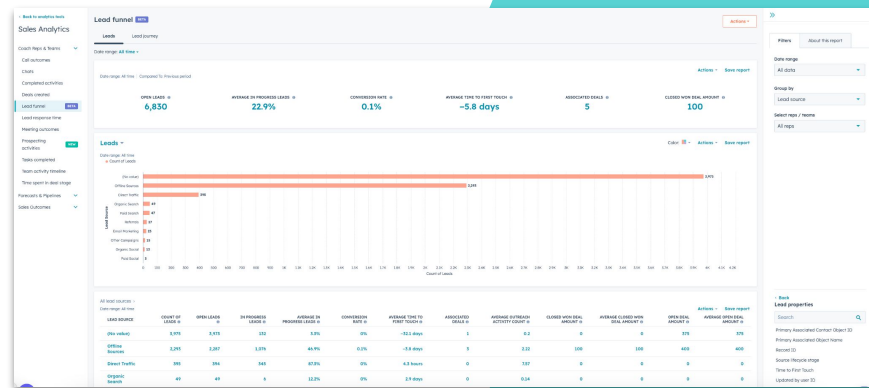


# New Sales Report - Lead Funnel

The Leads report empowers sales teams to track lead activity comprehensively, from initial contact to deal conversion, and analyze lead conversion rates to optimize lead nurturing strategies. It also enables businesses to evaluate lead source effectiveness and assess sales reps' performance, driving data-driven decisions for revenue growth and sales success.

## Use Case

Having a lead report equips sales teams with the necessary data and insights to optimize their lead management process, improve performance, and drive revenue growth.



Free

Starter

Pro

Ent

Public Beta

Launch region: Global



# Email and Form Assignment Based on Availability

With this release, emails and forms will only be assigned to agents who are available. If no agents are available, the email or form will be Unassigned, consistent with assignment in Live Chat and Facebook Messenger. Admins and Availability Management users can manage their agents' availability status even if the Inbox or Help Desk doesn't have a Live Chat channel enabled.

## Use Case

HubSpot Admins will see a new 'Assign to available users only' checkbox if they have automatic assignment and Specific users and teams selected when they connect a new email or form channel or edit their current email and form channel configurations under Inbox or Help Desk settings.

*\*Note: Starter customers cannot change the default setting*

Free

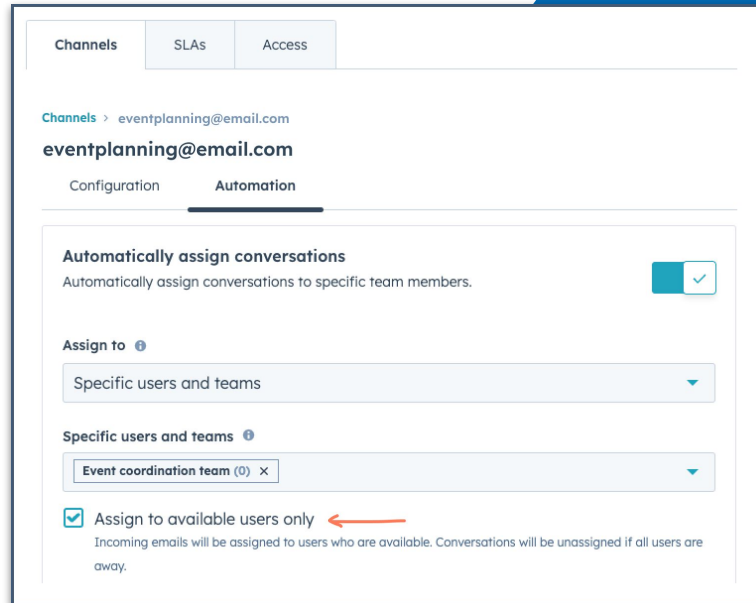
**Starter**

Pro

Ent

Public Beta

Launch region: Global



Channels SLAs Access

Channels > eventplanning@email.com

eventplanning@email.com

Configuration Automation

**Automatically assign conversations** ☒

Automatically assign conversations to specific team members.

Assign to ⓘ

Specific users and teams ▼

Specific users and teams ⓘ

Event coordination team (0) × ▼

☒ Assign to available users only ←

Incoming emails will be assigned to users who are available. Conversations will be unassigned if all users are away.



# Lead Form Routing

Introducing lead form routing to meetings, a new way to streamline your meeting booking process. With this latest update, we're making appointment scheduling a breeze. No more one-size-fits-all redirects! This feature empowers you to harness the information collected in your forms to customize the visitor's journey ensuring they are directed to the most relevant meeting link for their needs.

## Use Case

Customers can harness the information collected in their Forms to customize the visitor's journey, ensuring they're directed to the most relevant meeting link for their needs.

[Learn More](#)

Free

Starter

Pro

Ent

Public Beta

Launch region: Global

A screenshot of the HubSpot form configuration interface, specifically the 'Options' tab. The interface has a top navigation bar with 'Form', 'Options' (selected), 'Style & preview', and 'Automation'. Below the navigation bar, the main heading is 'What should happen after someone submits this form?'. Under this heading, there is a sub-heading 'Choose between displaying a thank you message or redirecting people to a website or scheduling page.' followed by three radio button options: 'Display a thank you message', 'Redirect to another page', and 'Redirect to a Meetings scheduling page'. The third option is selected, and a red arrow points to it. Below the radio buttons is a dropdown menu with the text 'Redirect everyone to the same scheduling page'. Further down, there is another section titled 'Redirect to a single meeting scheduling page' with a dropdown menu showing '60 min, 30 min, and 15 min meeting'.



# Announcing the Goals Template Library

Discovering and Creating Goals is easier than ever before with the new Goals Template Library!

Goals help customers enable teams and users to focus and align on the metrics that matter most to the growth of their business. With the new template library in the Goals app, you can now easily browse through the various Goals available, understand what is being measured and how, and quickly set them up with the newly optimized creation wizard, in just a few clicks.

## Use Case

The Goals template library enables an easy-to-understand browsing experience, allowing for better discovery and planning and an optimized creation wizard leading to quicker Goal setup.

Free

Starter

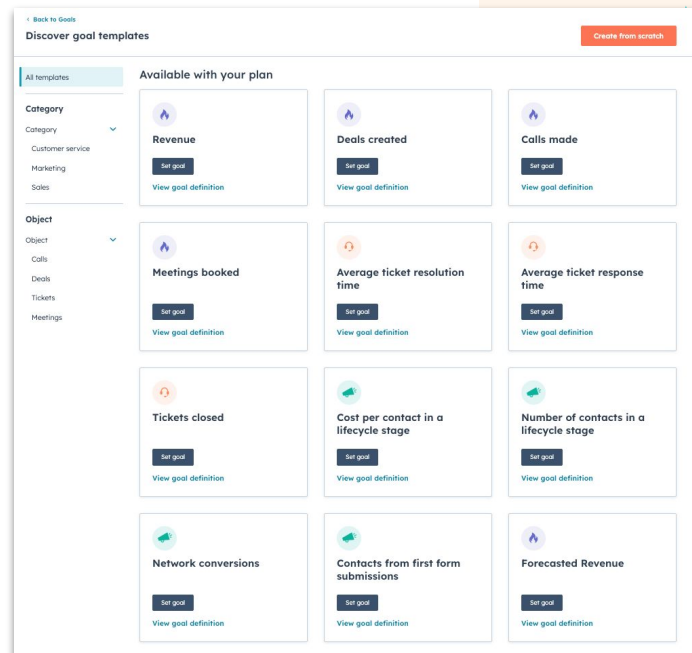
Pro

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Live

Launch region: Global

*\*available to Marketing and Service Pro+ and Sales Starter+ users*



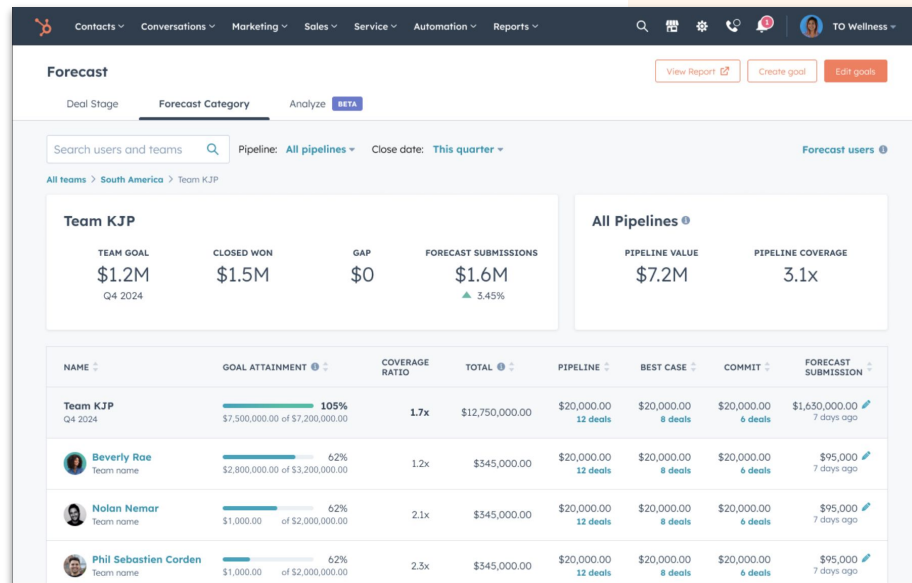


# Forecast Across All Pipelines

You can now manage goals and forecasts across all your pipelines.

## Use Case

Previously, customers could only manage forecasts per pipeline. Some businesses don't operate their forecasting process by pipeline, so we added the flexibility to manage forecasts across all pipelines (i.e. selling motions)



Free

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Launch region: Global



# AI-Powered Automatic Associations for Calls - Tickets

Customers can now participate in the public beta that automatically associates calls with tickets in HubSpot.

## Use Case

When a call record is created, HubSpot AI will look for relevant tickets and associate them with the call.

To identify relevant ticket records, HubSpot AI looks at multiple fields, including contact and company associations, call owner, ticket owner, ticket name, and ticket creation time.

[Learn More](#)

Free

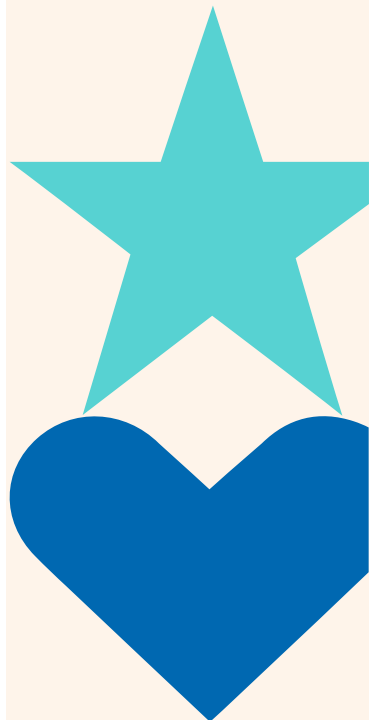
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Public Beta

Launch region: Global





# AI-Powered Automatic Associations for Calls - Meetings

You can now sign up for the public beta that lets HubSpot AI automatically associate calls with relevant meeting records.

## Use Case

When a call record is created by an integration, HubSpot AI will look for the relevant meeting record and associate it to the call.

Associated meetings will be visible in the associations sidebar on the recording review page. Like other automatic associations, these will be labeled with the HubSpot AI icon and hint.

[Learn More](#)

Free

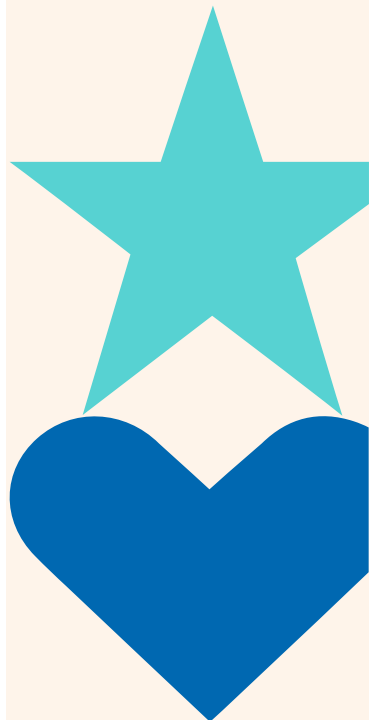
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Public Beta

Launch region: Global



## A/B Testing Sequence Steps

A/B testing allows you to experiment with different versions of your content to determine what performs better with your audience. Within sequences, you can now test different templates within any email step and report on performance to quickly iterate and optimize outreach.

### Use Case

With the ability to A/B test sequence steps, teams can quickly experiment and iterate to improve their outreach efforts and boost conversion rates.

[Learn More](#)

Free

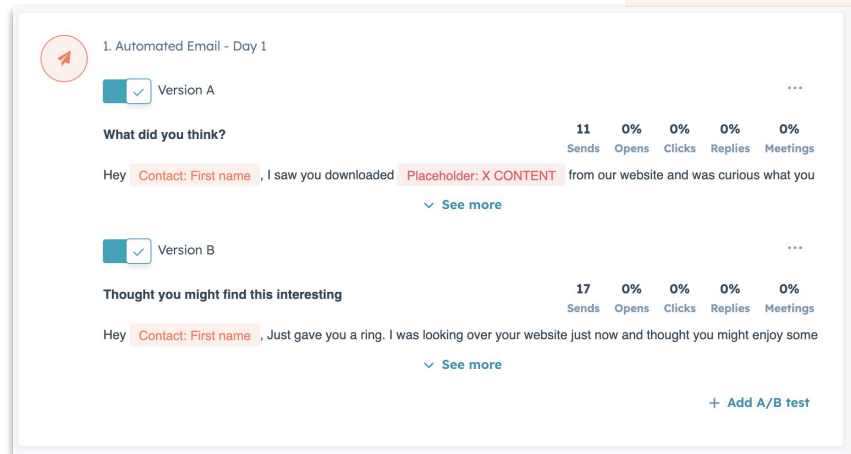
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Launch region: Global





## New Goals Permission

The new Goals permission allows customers to have more control over who can view and edit goals in a simple and effective way.

We have replaced the previous permissions experience, where each goal template's permissions were governed by other apps and didn't follow a consistent behavior. The new goals permissions will make it easy for customers to understand, define, and change goal permissions as needed.

### Use Case

This new permission will allow customers to set View (Everything, Team only, Owned only) and Edit (Everything, Team only, View only, None) Goal permissions, for each user.

[Learn More](#)

Free

Starter

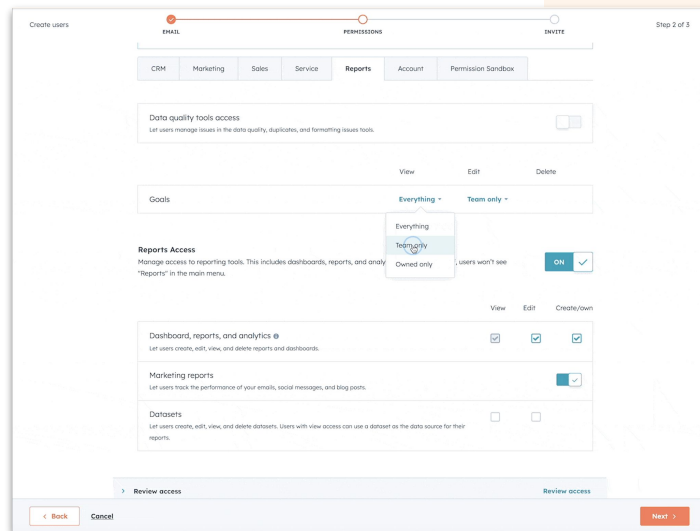
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Launch region: Global

*\*available to Marketing and Service Pro+ and Sales Starter+ users*







# Make Call Outcomes Required

Administrators now have the capability to enable a portal-wide functionality, requiring representatives to log a call outcome prior to saving outbound browser calls or logged calls within HubSpot. Call Outcome is a property for HubSpot users to better detail the results of their calling activity. This custom property includes preset fields such as "connected," "left voicemail," or "wrong number," and offers the flexibility to incorporate personalized options.

## Use Case

Adding a new requirement setting forces more consistency in call outcomes being logged, creating great workflow behaviors on calls for reps, and syncing more call data to reports for admins to analyze.

Free

Starter

Pro

Ent

Live

Launch region: Global

## Calling

Phone Numbers

Call Configurations

Transcription and Analysis

These settings will apply to everyone using HubSpot calling in your account. To manage your integrations, go to [Connected Apps](#).



### Place calls using HubSpot calling

Allow HubSpot calling as a provider for making calls. When turned off, other calling integrations can still be used.



### Track call and meeting types [Edit options](#)

Organize how your team logs activities by providing custom meeting and call types. Use these custom activity types to report on which calls and meetings are most successful in your sales process.

### Track call outcomes [Edit options](#)

Organize how your team logs activities by providing custom call outcomes. Report on this to track call patterns.



### Make call outcome required

Requires users to select the outcome of a call when it is completed or logged on a record.

## Log Call

Contacted

Brian Halligan (Sample Co...

Call outcome

Select an outcome

Direction

Select call direction

Date

08/21/2023

Time

3:18 PM

Describe the call...

B I U T More



Associated with 1 record

Log activity



Create a To-do task to follow up  
In 3 business days (Thursday)



## Sequences on Mobile

iOS and Android Apps will support enrolling, un-enrolling, pausing and resuming contacts from a sequence.

### Use Case

Sequences are a key part of a sales reps prospecting workflow - it's how you qualify leads and get them into your calendar as quickly and efficiently as possible. Being able to do this on mobile brings Sequences to the next level, untethering the prospecting sales rep from their desks.

Free

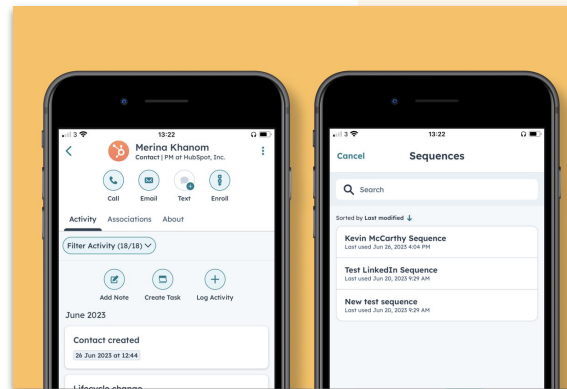
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Public Beta

Launch region: Global





# Improvements to filtering Lists by Sequence properties

We're adding two new properties to the Sequence enrollment filters in Lists:

**Sequence** - this filter allows you to filter by a particular sequence enrollment

**Status** - this filter allows you to filter by the contact's current status in the sequence. Status options include error, finished, in progress, paused, and scheduled.

## Use Case

Filter by the specific sequence or a contact's status within the sequence.

Free

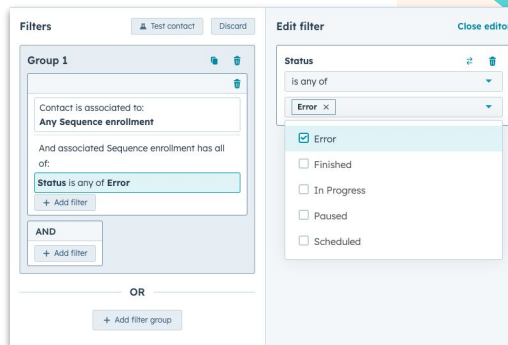
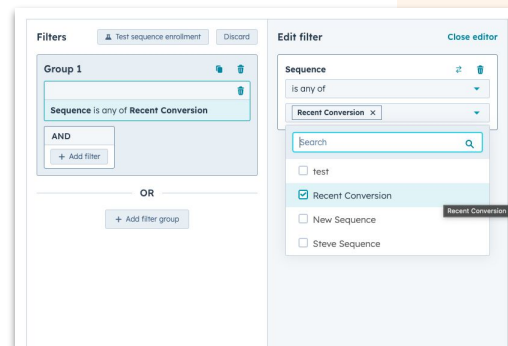
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Launch region: Global





# Log Emails to Custom Objects from Gmail & O365

The ability to log emails to HubSpot custom objects from within Gmail and web-based Office 365.

## Use Case

Save time and streamline your workflow by logging emails directly from your inbox to custom objects, eliminating the need to switch between screens and ensuring accurate email tracking within HubSpot.

Free

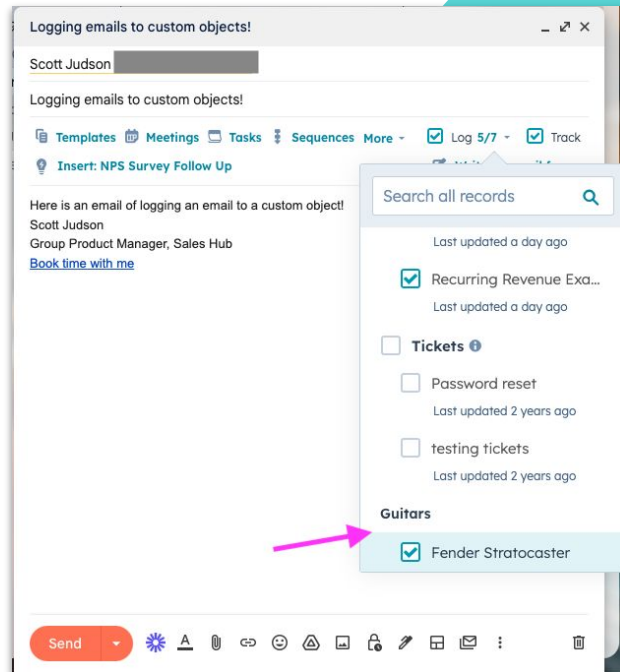
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Public Beta

Launch region: Global



# WhatsApp Improvements in the Conversations Inbox

We recently released the following updates to WhatsApp in the Inbox:

**Read Receipts, Message Metadata, Message Quarantining,**  
and **Move between inboxes**

## Use Case

Supporting message reactions, replies to direct messages on the conversation thread.

Free

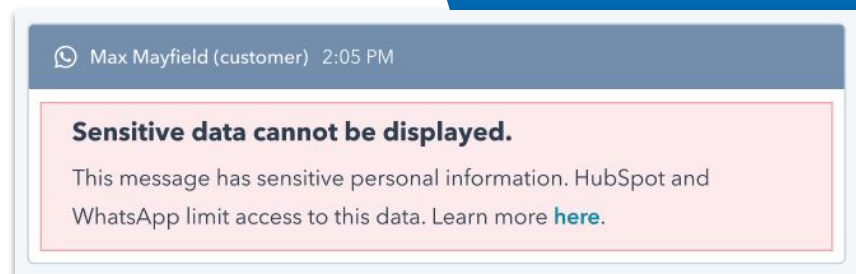
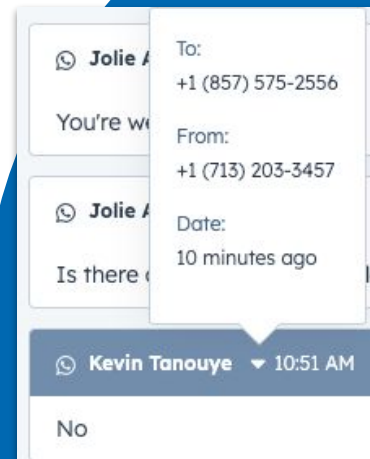
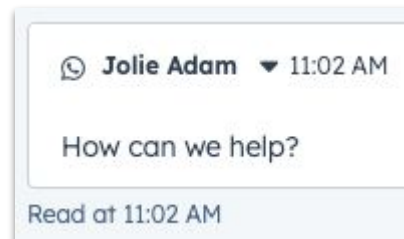
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Launch region: Global





# Book Meetings on Behalf of Other Users in Service Hub

We recently introduced a new feature that enables users to schedule meetings for their peers within the meeting scheduling flow - making it easier for teams to understand who is booking meetings and for whom. In addition to currently being available to Sales Hub Pro and Enterprise users, this is now available for Service Hub Professional and Enterprise paid users!

## Use Case

This update helps teams streamline the meeting booking process, providing a one-stop shop for all scheduling needs. No longer will reps have to use scheduling pages to book meetings on behalf of others. Instead, with just one click, users can now schedule meetings for the right representative directly from the contact record.

Free

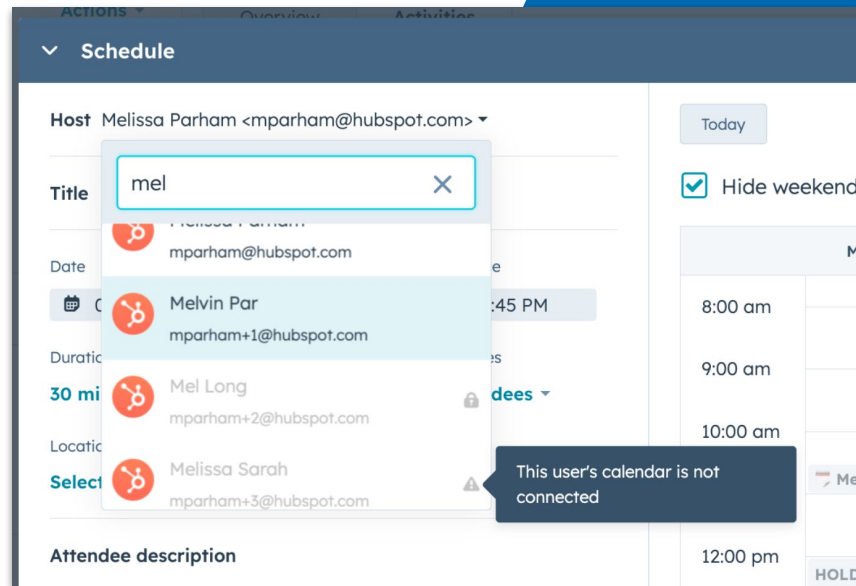
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Launch region: Global





# Working Hours + Custom Voicemail

**Working Hours** allows you to set user availability in HubSpot. For admins, having calling reps set their working hours enables you to plan staff coverage more efficiently, ensuring that there are enough reps available to handle incoming calls.

**Custom Voicemails** allows your teams to add a personalized touch to voicemail messages so your customers and prospects can connect directly to with your brand.

## Use Case

Set working hours for HubSpot users and set custom voicemail for your HubSpot numbers.



Launch region: Global

### 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 setup.

Day	Starting time	End time	Timezone
Sat - Sun	from 9:00 AM	to 5:00 PM	UTC -04:00 New York
Mon - Fri	from 10:00 AM	to 3:00 PM	UTC -04:00 New York

+ Add hours

### HubSpot calling

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

Add phone number

PHONE NUMBER	NUMBER TYPE
Test Me +1 (404) 689-1504	HubSpot number Inbound and outbound calling
TOP PROSPECTS CALIFORNIA +1 (213) 528-4896	HubSpot number Inbound and outbound calling

Actions

Edit

Delete



# Inbound Calling Tab Now Has a Dedicated Window

Now, the Inbound Calling tab opens in a dedicated browser window.

## Use Case

The *Call tab* page enables you to receive inbound calls in your HubSpot browser. The page must remain open to receive inbound calls.

Free

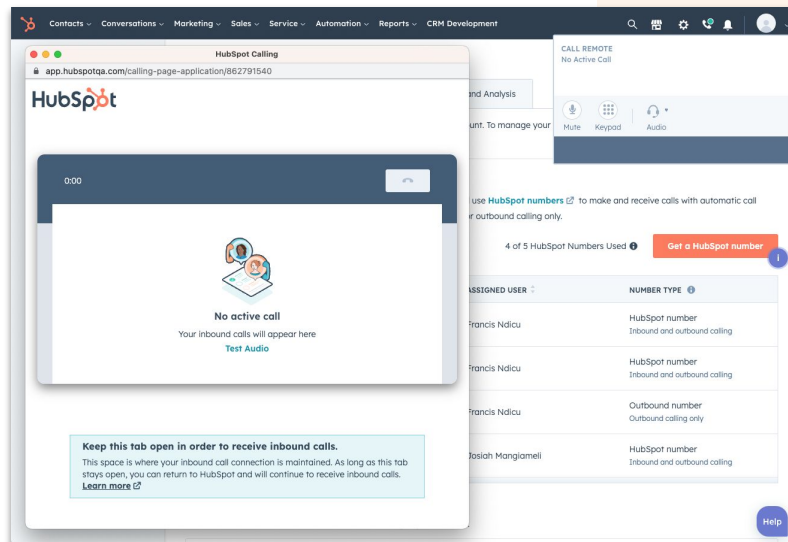
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Launch region: Global







# Meeting Rotations in CRM Scheduling

You can now book meetings on behalf of others through a round-robin rotation right from the contact, company, deal, or ticket record in the CRM.

## Use Case

In addition to booking meetings on behalf of other specific individuals, Sales Hub Pro+ paid users can select a meeting rotation through the CRM, allowing HubSpot to tell the booking rep which sales rep is "up next" to receive the meeting. The result is that sellers no longer have to struggle with workarounds to schedule meetings or keep track of which reps are booking meetings for other team members.

Host

AEs

Search users and meeting rotations

Meeting Rotations (2) NEW

AEs

Meetings Engineers

Users

Melissa Parham  
mparham@hubspot.com

Melvin Par  
mparham+1@hubspot.com

Attendee description

Send a description to your attendees...

B I U T L More Associated with 1 record

Save Cancel

Today

Jun 19 - Jun 23, 2023

Hide weekends

UTC -04:00 Eastern Time

	MONDAY - 19	TUESDAY - 20	WEDNESDAY - 21	THURSDAY - 22	FRIDAY - 23
8:00 am	Out of office				
9:00 am					
10:00 am			Tim / Melissa	Rolling dates reqs 9:00 AM - 10:00 AM	Gym 9:00 AM - 10:00 AM
11:00 am		testing doc prep Meetings Team ... lunch 11:00 AM - 12:00 PM	OPTIO... 10:00 AM - 11:00 AM [Option... lunch 11:00 AM - 12:00 PM	Rotatio... 10:00 AM - 11:00 AM 10:30 A... Walkthrough the Ba...	
12:00 pm		Onboarding Loans 12:00 PM - 1:00 PM	Melissa / Scott 1.1 12:00 PM - 1:00 PM	lunch 12:00 PM - 1:00 PM	Test rotation booking
1:00 pm			Melissa / Pranav 1.1 Melissa / Ana Melissa / Jolene (R...	Melissa/Alex Intro	
2:00 pm					
3:00 pm			Onboarding Docs 3:00 PM - 4:00 PM	Rolling dates and r... 4:00 PM - 5:30 PM	Testing Booking CO...
4:00 pm		Rotations Testing D...	Melissa / Emma		

Free

Starter

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Live

Launch region: Global



# Lists Team Permissions Security Updates

For customers enrolled in the Beta for Asset Permissioning - Lists, two security updates ensure the right individuals can access the right lists:

**1. Consistency in filtering outside the lists tool:** Users who see a limited set of lists, based on their team assignment, will only see those same lists across tools where lists can be filtered on. These include e-mail, workflows, reports, and the Contacts and Companies page.

**2. Only Super Admins can assign a list back to All Teams.** When a list is assigned to a team, members of that list are limited to records that have an owner inside that team (learn more about record ownership here). We have limited this functionality to super-admins because assigning a list back to All Teams enrolls all members who meet the list criteria, regardless of the owner.

## Use Case

As an admin, be able to assign lists that users only see and use the data that are relevant to their role.

Free

Starter

Pro

Ent

Live

Launch region: Global

### Assign lists to a team

Select a team

Marketing EMEA

You're about to assign: **3 lists**

- Petrol Price Change Notice - POC upda... (used in 1 asset)
- Red Health Checks (cloned) (used in 1 asset)
- Academy list (used in 0 assets)

The results in these lists will only include records assigned to this team. Unassigned records will be removed.

This can impact workflows, reports, emails, and other assets.

Assign lists

Cancel

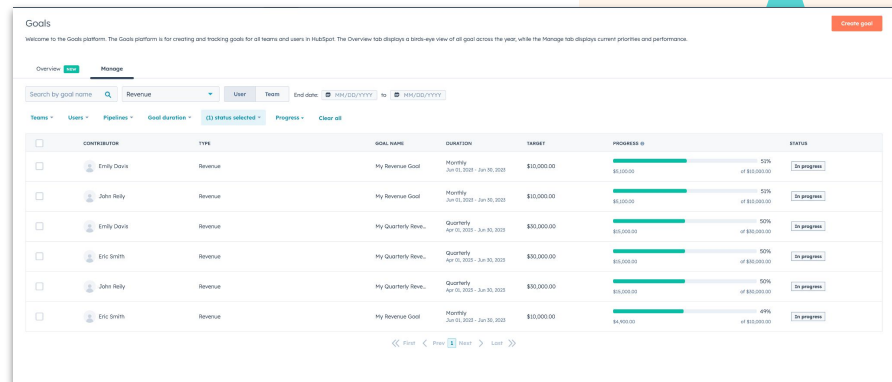


## Goals Overview Tab

The goals console now has a brand new Overview Tab. This view gives users a birds-eye view of all goals, associated targets, progress, and status for the full year, without losing any context between goals and targets. You can now identify trends, view and edit targets, and see a year's snapshot, all in the same tab!

### Use Case

A snapshot view of all goals, targets, and progress across the whole year.



Free

Starter

Pro

Ent

Live

Launch region: Global



Operations Hub™



# Easily Review Data Model Adoption & Usage

The Data Model Overview now enables users to quickly get an understanding of their data completeness and adoption.

## Use Case

1. What percent of companies have the owner property filled out?
2. Are there any custom properties that look unused and can be archived?
3. How many workflows do I have that are contact based?

[Learn More](#)

Free

Starter

Pro

Ent

Live

Launch region: Global

## Contacts

Use the contact object to track the people who interact with your business.

[2 Contact records created](#) | [View Contact settings](#)

Usage

Properties

Associations

Used In

Total records created

2

Property insights



22% (35 of 156) of your properties have a value on at least 1 Contact

You have **121 properties** with **No Data.** ⓘ

You have **155 properties** that are **Unused.** ⓘ

# Anomaly Monitoring on Property Updates

Introducing the ability to proactively monitor properties for anomalies in update volume across the CRM using HubSpot AI. This includes a new section of the data quality command center that monitors properties and takes action. Users will also have the ability to subscribe themselves, and other users, to notifications triggered by the anomaly issues.

## Use Case

With anomaly monitoring, you can select the properties you care about most and HubSpot AI insights will help you to stay on top of changes to data in your CRM.

Free

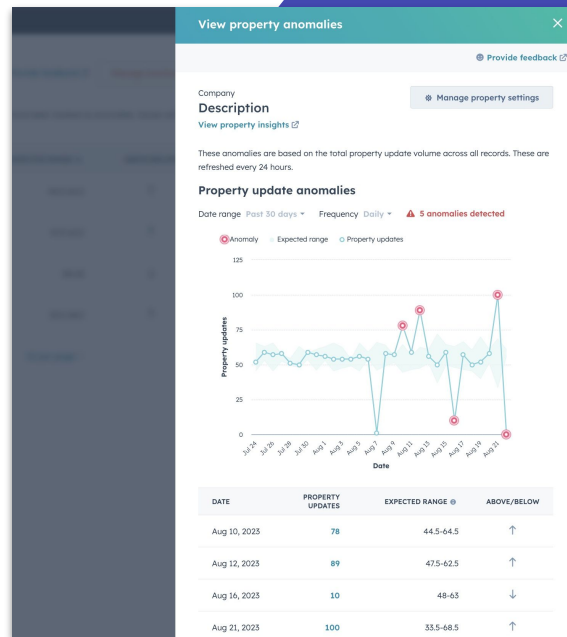
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Public Beta

Launch region: Global



# HubSpot AI Location Formatting Suggestions for Contacts

HubSpot AI searches for contacts with missing data or mismatches in location properties like Country, Zip Code and provides clean-up suggestions. **Note:** This is a re-release after making feature improvements based on customer feedback.

## Use Case

Location data (Country, State/Region, Zipcode, Timezone) comes into the CRM in a variety of formats including full-length and abbreviated. Without standardization on these fields, it can be difficult to create reports, lists or trigger automation. With this feature, HubSpot AI automatically suggests the correct format for your business to make it easy to detect, review and resolve potential issues.

[Learn More](#)

Free

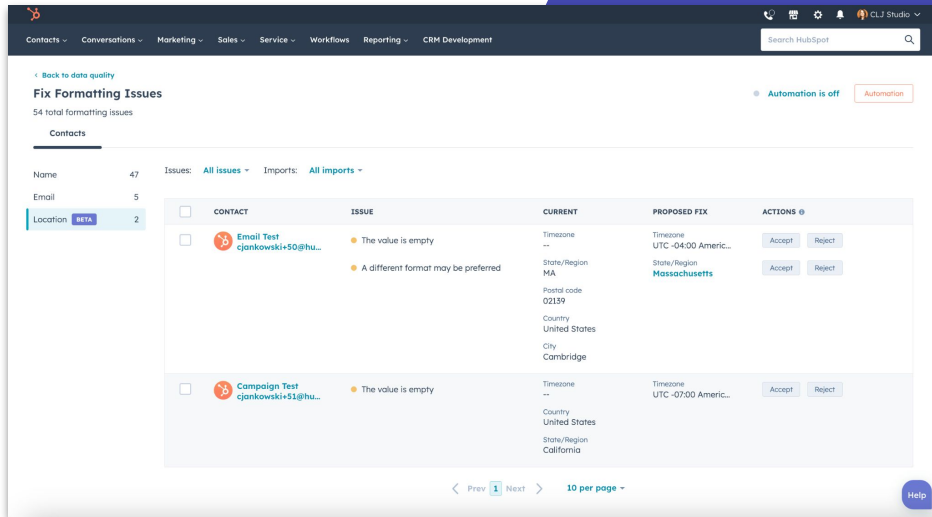
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The screenshot shows the HubSpot AI 'Fix Formatting Issues' interface. At the top, there's a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Service, Workflows, Reporting, and CRM Development. A search bar is on the right. Below the navigation, the title 'Fix Formatting Issues' is displayed, along with a toggle for 'Automation is off' and a button for 'Automation'. A summary indicates '54 total formatting issues'. A sidebar on the left shows filters for Name (47), Email (5), and Location (9876, with 2 issues highlighted). The main table lists issues for two contacts: 'Email Test' and 'Campaign Test'. Each issue entry shows the current value, the proposed fix, and buttons to 'Accept' or 'Reject'.

CONTACT	ISSUE	CURRENT	PROPOSED FIX	ACTIONS
<input type="checkbox"/> Email Test cjanowski+50@hu...	The value is empty	Timezone --	Timezone UTC -04:00 Americ...	Accept Reject
	A different format may be preferred	State/Region MA Postal code 02139 Country United States City Cambridge	State/Region Massachusetts	Accept Reject
<input type="checkbox"/> Campaign Test cjanowski+51@hu...	The value is empty	Timezone -- Country United States State/Region California	Timezone UTC -07:00 Americ...	Accept Reject

# Daily AI-Powered Duplicate Checks for Contacts and Companies

Daily AI-powered duplicate checks automatically scan for new duplicate contacts and companies and show potential matches to merge within the manage duplicates tool.

## Use Case

You can now see a refreshed list of potential duplicate contacts and companies daily. It was previously every two weeks so this is a huge improvement for data management and cleanup.

[Learn More](#)

Free

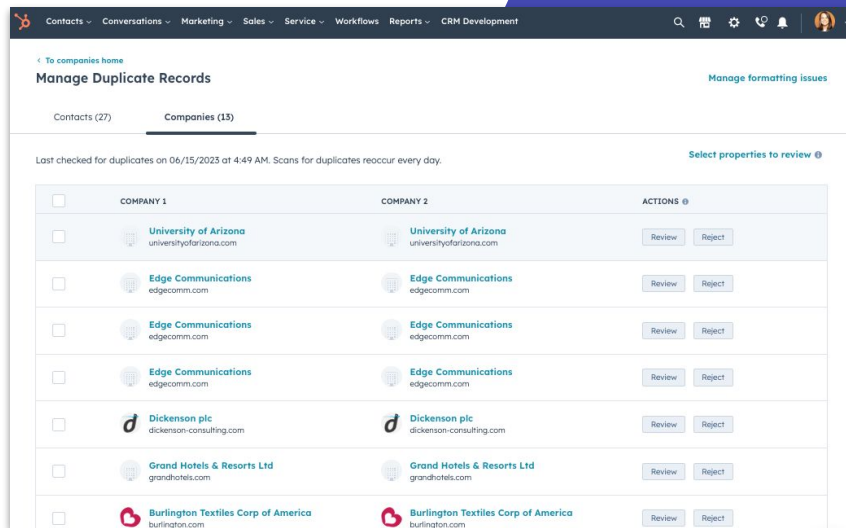
Starter















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Launch region: Global



	COMPANY 1	COMPANY 2	ACTIONS @
<input type="checkbox"/>	 University of Arizona universityofarizona.com	 University of Arizona universityofarizona.com	<button>Review</button> <button>Reject</button>
<input type="checkbox"/>	 Edge Communications edgecomm.com	 Edge Communications edgecomm.com	<button>Review</button> <button>Reject</button>
<input type="checkbox"/>	 Edge Communications edgecomm.com	 Edge Communications edgecomm.com	<button>Review</button> <button>Reject</button>
<input type="checkbox"/>	 Edge Communications edgecomm.com	 Edge Communications edgecomm.com	<button>Review</button> <button>Reject</button>
<input type="checkbox"/>	 Dickenson plc dickenson-consulting.com	 Dickenson plc dickenson-consulting.com	<button>Review</button> <button>Reject</button>
<input type="checkbox"/>	 Grand Hotels & Resorts Ltd grandhotels.com	 Grand Hotels & Resorts Ltd grandhotels.com	<button>Review</button> <button>Reject</button>
<input type="checkbox"/>	 Burlington Textiles Corp of America burlington.com	 Burlington Textiles Corp of America burlington.com	<button>Review</button> <button>Reject</button>





# Link to Data Quality Formatting Issues Post-Import

After running an import, customers will now be able to see any potential formatting issues and have a direct link to resolve them within the formatting issues tool. This update also adds the ability to filter by import in the formatting issues view.

## Use Case

Imported data can update the CRM without the need for quality checks. This feature helps customers have real-time, immediate insights into the quality of key properties (First Name, Last Name, Email) and AI-powered suggestions to fix issues.

[Learn More](#)

Free

Starter

Pro

Ent

Live

Launch region: Global

HubSpot import - Contacts and companies import file - HubSpot example - Contacts and companies import file.csv.csv

Learn more about import  
[Import records and activities](#)  
[Setup your import files](#)  
[Troubleshoot import errors](#)

Contacts  
Tuesday, June 20, 2023 3:57 PM  
Cara Jankowski cjankowski@hubspot.com

Summary

IMPORT ROWS	NEW RECORDS	UPDATED RECORDS	NEW ASSOCIATIONS
5	2	3	--

[View Contacts](#) [More](#)

Clean up imported data

CONTACT FORMATTING ISSUES

2

Import completed with no errors

Fix Formatting Issues

Automation is off

Contacts (2) Companies (0)

Name 2 Issues: All issues Imports: HubSpot import - Contacts and companies import file - HubSpot example - Contacts and companies import file.csv.csv

CONTACT	ISSUE	CURRENT	PROPOSED FIX	ACTIONS
JORDAN Schilfhaus jordan@xxw.com	Missing or unexpected capitalization	First name JORDAN	First name Jordan	<a href="#">Accept</a> <a href="#">Reject</a> <a href="#">Automate</a>
Alex SMITH asmith@wesleya...	Missing or unexpected capitalization	Last name SMITH	Last name Smith	<a href="#">Accept</a> <a href="#">Reject</a> <a href="#">Automate</a>

10 per page

# Trigger Workflows with Events and Custom Behavioral Events

You can now trigger workflows when an event happens! This allows for more timely and personalized automation and better matches the way in which customers think of automation.

Additionally, there are some new exciting updates to triggers below!

- Form interaction and form viewed events
- Property value changed
- Custom Behavioral Event trigger
- Object creation events
- Sales document events
- Sequence engagement events
- Calling events (call started and call ended)
- Meeting events (contact booked meeting + contact changed meeting outcome)

## Use Case

The ability to trigger a workflow when a property value changes.

Free

Starter

Pro

Ent

Live

Launch region: Global

*\*available to all Workflow users with Pro+ plans*

Enrollment triggers

CancelSave

Trigger when an event occurs

[Change trigger type](#)

Select the event that will trigger this workflow:

Ads

**Ad interaction**

Triggers when an ad is interacted with

Calls

**Call ended**

Triggers when a call initiated through HubSpot comes to an end

**Call started**

Triggers when a call is initiated through HubSpot

CRM

**Object created**

Triggers when an object is created in the CRM

**Property value changed**

Triggers when a property value is changed



# Increased Limit of Contact and Company Duplicate Pairs for Ops Hub Pro

You can now see up to 5,000 potential duplicate contact and companies respectively in the manage duplicates tool, powered by AI. This is an increase from the current limit of 2,000.

## Use Case

Customers will find it easier to surface more opportunities to merge potential duplicates. Streamlining the process and saving time.

[Learn More](#)

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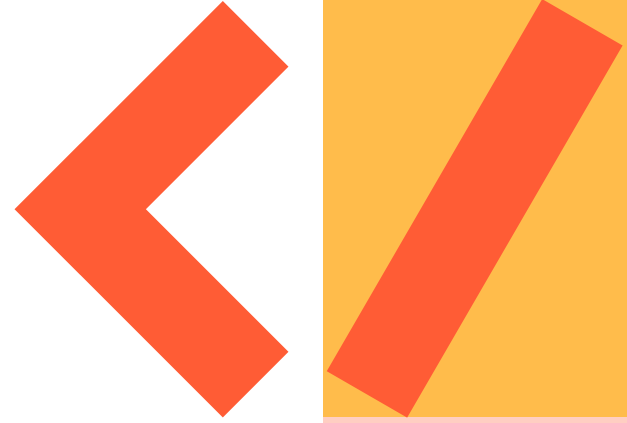
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Launch region: Global

# Developer Platform



## Developer Platform

# Users can now create contacts with associations using the Contacts API

With this update to our Contacts API, you can now create contacts and associate them with [existing records](#) or [activities](#) in the same request.

### Use Case

This optional feature enhances the flexibility of our Contacts API by streamlining and optimizing the creation and management of Contact associations.

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Launch region: Global

#### Associations

When creating a new contact, you can also associate the contact with [existing records](#) or [activities](#). In the associations object, include the following fields:

PARAMETER	DESCRIPTION
toObjectId	The ID of the record or activity that you want to associate the contact with.
associationTypeId	A unique identifier to indicate the association type between the contact and the other object or activity. Default association types are listed <a href="#">here</a> , or you can retrieve the value by making a GET request to <code>/crm/v4/associations/{fromObjectType}/{toObjectType}/labels</code> . Learn more about the <a href="#">associations API</a> .

You can also include the `label` field to assign a [defined association label](#) that describes the association. Learn more about associating records via the [associations API](#).

For example, to associate a new contact with an existing company and email, your request would look like the following:

#### JSON

```
11 },
12 "associations": [
13   {
14     "to": {
15       "id": 123456
16     },
17     "types": [
18       {
19         "associationCategory": "HUBSPOT_DEFINED",
20         "associationTypeId": 279
21       }
22     ],
23     {
24       "to": {
25         "id": 556677
26       },
27       "types": [
28         {
29           "associationCategory": "HUBSPOT_DEFINED",
30           "associationTypeId": 197
31         }
32       ]
33     }
34   ]
35 }
```

## CRM Platform

# Property Validation Rules Now Enforced via APIs and Integrations

Property Validations allow admins to prevent data quality issues before they start. By setting up property validation rules, admins can control what data can be entered into their system ensuring the entry of clean, reliable, and accurate data.

Previously, these validation rules were only enforced in the UI and on mobile with manual entry but not on integrations. Starting today, when you set property validation rules in your system these rules will also be enforced via APIs and integrations.

### Use Case

With this update, you can ensure that the data being entered into your system meets the specific criteria you have established and avoid errors caused by manual and automated data entry. This will lead to improved data quality, streamlined workflows, and more accurate reporting.

[Free](#)[Starter](#)[Pro](#)[Ent](#)[Live](#)

Launch region: Global

## Developer Platform

# Ability to hide all HubSpot default modules

With this update, developers now have the ability to easily filter out all default modules at once using the "hide\_all\_default\_modules" property. To use it, simply set "hide\_all\_default\_modules: true" in theme.json and publish your changes.

### Use Case

For customers working with developers to create and use a custom theme, theme modules are typically preferred for content creation since they are custom-made. In order to prevent content marketers from using non-custom modules, developers often choose to "hide" all HubSpot default modules that are not part of the theme. However, manually hiding each module can be time-consuming, and developers have to constantly check for newly added modules to filter them out as well.

[Free](#)[Starter](#)[Pro](#)[Ent](#)[Live](#)

Launch region: Global

# CRM Platform





# CRM Platform

## Access associated record data in workflows with Data Panel

The new Data Panel in workflows gives you access to more of your CRM data, which ensures your team can work quickly and effectively, to provide a delightful customer experience.

### Use Case

Now, with the new data panel, you can access data from enrolled records and their associated objects and use it all in your workflow actions.

- Power a new customer kick-off process by sending payment alerts to Slack, that include the customer's name, payment status, and subscription details.
- Set your customer success managers to have effective calls by sending them robust pre-meeting notifications that include key details about the point of contact's recent activity, their most recently opened support ticket, and the latest feedback score.

[Learn More](#)

Free

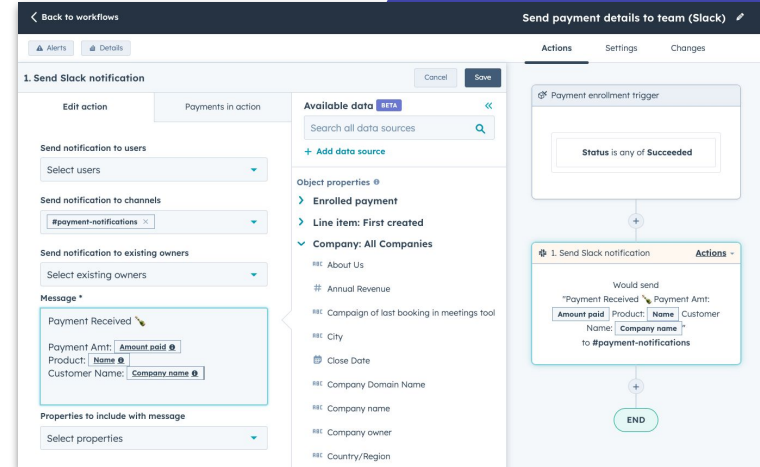
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Launch region: Global



## CRM Platform

# Workflow Email Cancellations

We will now be canceling workflow emails for underperformance. Additionally, we are adding visibility of cancellations on the email manage and post-send screen with clear reasoning and details. We are also adding messaging in the workflow tool to indicate that emails are dropped due to cancellations

### Use Case

In order to limit the risk workflow emails pose to our network health and to prevent customers from damaging their own reputation, we need to ensure we can apply similar rules to workflow emails as we do to Marketing Emails.

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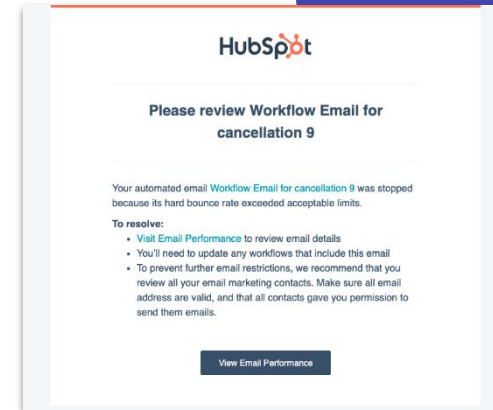
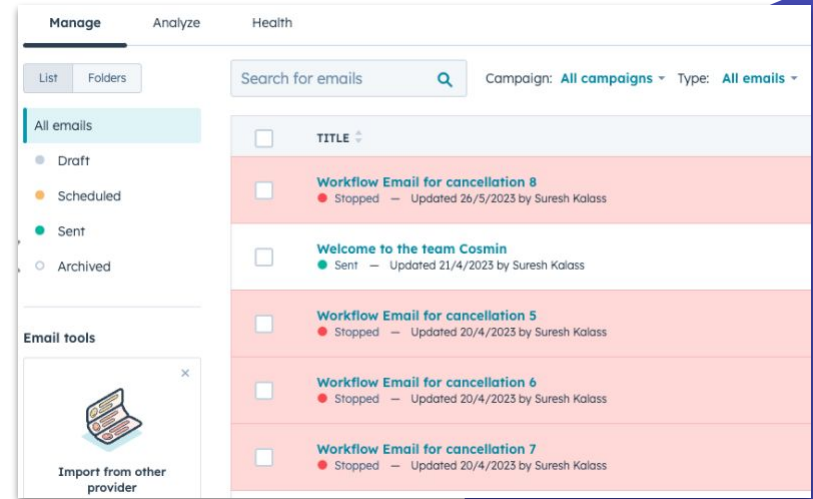
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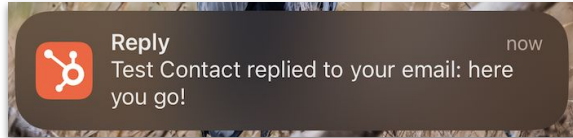
## CRM Platform

# Email Reply Notifications on Mobile

You can now be notified via the HubSpot mobile app if a contact replies to an email sent from your personal connected inbox.

### Use Case

Simply click the notification to be brought directly to the email thread in HubSpot where you can reply and continue the conversation.



[Learn More](#)

Free

Starter

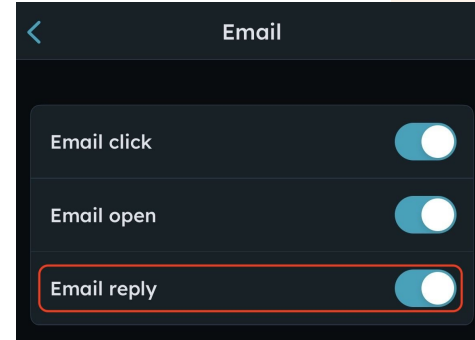
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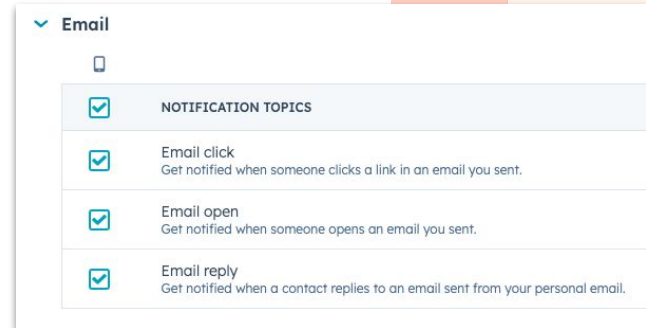
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Launch region: Global

From [the mobile app](#):



From your computer:



# CRM Platform

## List Limits Increase

We've increased the number of static and active lists across all HubSpot subscriptions.

### Use Case

As your business grows, so does the need to further segment and engage with your audiences. Having additional lists can help you run highly personalized campaigns without worrying about getting closer to your list limits.

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Launch region: Global

### New Limits Overview:

#### Marketing Hub, Service Hub, Sales Hub Enterprise

- Previous Limit
  - 1500 Active Lists
  - 1500 Static Lists
- New Limit
  - 2000 Active Lists
  - 2000 Static Lists

#### Marketing Hub, Service Hub, Sales Hub Professional

- Previous Limit
  - 1000 Active Lists
  - 1000 Static Lists
- New Limit
  - 1200 Active Lists
  - 1200 Static Lists

#### Marketing Hub, Service Hub, Sales Hub Starter

- Previous Limit
  - 25 Active Lists
  - 1000 Static Lists
- New Limit
  - 50 Active Lists
  - 1000 Static Lists

### Free Tier and All CMS Hub Tiers

- Previous Limit
  - 5 Active Lists
  - 1000 Static Lists
- New Limit
  - 10 Active Lists
  - 1000 Static Lists

### Operations Hub Tiers

- Previous Limit
  - 100 more active and 100 more static lists
- New Limit
  - No changes

### Business Unit Add-Ons\*

- Previous Limit
  - Any number of Business Units gets 500 active and 500 static lists
- New Limit
  - 100 active and 100 static lists per each additional Business Unit. There will be a limit of 5,000 total active and static lists.

## CRM Platform

# Increased Editing Functionality for Custom Objects

Users will now be able to add and remove secondary display properties after creating their custom object. Additionally, we've made minor copy improvements to make it clearer what can be changed while in edit mode.

### Use Case

Create new properties to add as secondary display properties while editing your custom objects.

### Edit the secondary display properties

Secondary properties appear just below the primary property. They add context to a record.

[See an example](#)

Secondary

Once this property has been set, it can't be changed.

Example: Pet type

Address

Property type

Single-line text



[Edit property label](#)

[+ Add property](#)

Free

Starter

Pro

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Live

Launch region: Global

*\*This feature is available to all super admins in portals that have at least one Enterprise subscription*

# CRM Platform

## Deal Lists

You can now create lists of deals!

### Use Case

Previously, in the lists tool, you could only create lists of contacts and companies. Now you can create a list of your most important deals using any data from the Deals object or its Associated Objects.

Free

Starter

Pro


Ent


Live


Launch region: Global

[← Back to lists](#)

Create a list

**Contact-based**  
Create a list of Contact records

**Company-based**  
Create a list of Company records

**Deal-based** NEW  
Create a list of Deal records

List name \*

What kind of list are you creating?  
☒ Active list  
Active lists automatically update over time. Records will join or leave the list as their properties change.  
☐ Static list  
Static lists do not automatically update as your records change. A static list represents a single moment in time.

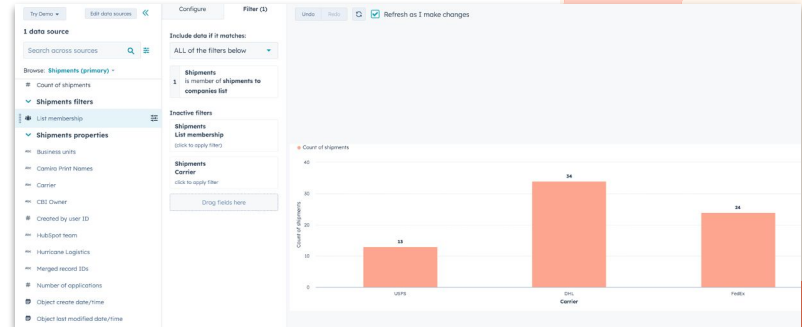
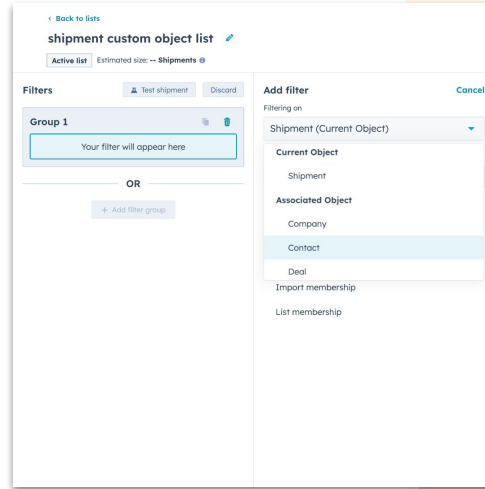
# CRM Platform

## Custom Object Lists

You can now create lists of Custom Objects!

### Use Case

Previously, in the lists tool, you could only create lists of contacts, companies, and deals. Now you can create a list of your most important data using any Custom Object you have created.



Free

Starter

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Launch region: Global

## CRM Platform

# Use Any List as a Filter in the Custom Report Builder

We have made it even easier to create a report using only the members of a specific list as a filter.

### Use Case

Understanding the breakdown of your most important lists can be critical when deciding how to engage with that segment next. Getting a head start on building your report saves you time and helps you easily focus on the list you need.

*\*only available to Marketing Hub, Sales Hub and Service Hub Pro+ users*

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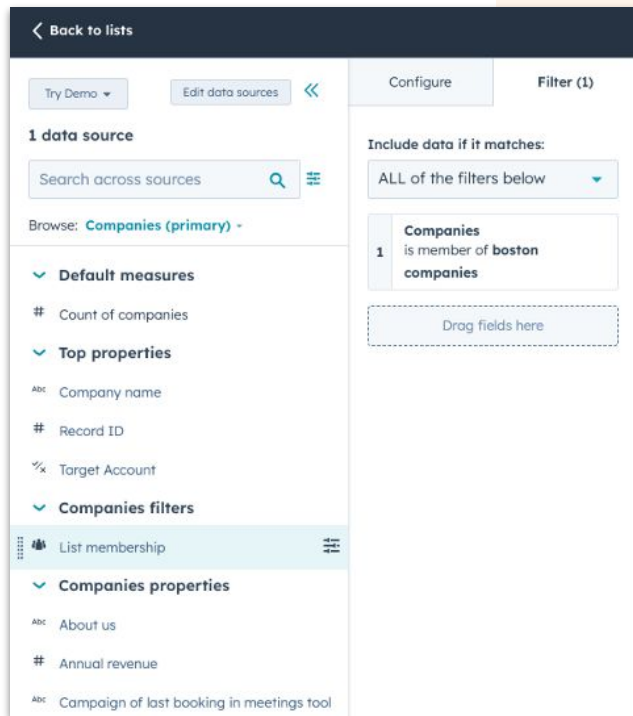
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## CRM Platform

# Referencing Company Lists in Contact Lists

Arriving at the Contacts associated with a Company list usually involves:

1. Exporting the Company list data
2. Doing some magic in a spreadsheet to arrive at your associated contacts
3. Then importing those contact records back into HubSpot.

This update reduces that process down to a few clicks inside of the Lists tool, while also supporting the reverse: referencing existing Contact lists in Company list filters - supercharging both list types.

### Use Case

This update makes creating a list of Contacts associated with a Company List as easy as a few clicks within the Lists tool.

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Launch region: Global

The screenshot displays the HubSpot Lists tool interface for configuring a filter for 'Group 1'. The filter is set to 'City is equal to any of Boston'. Below this, an 'AND' condition is shown, where 'Contact is associated to: Primary Company'. Underneath, it states 'And primary Company has all of:'. A red box highlights a nested 'AND' condition with two list membership filters: 'is member of May email to local target companies' and 'is not member of Company Suppression List'. At the bottom, there are '+ Add filter' buttons for the main condition and the nested condition.

## CRM Platform

# Conditional Stage Properties for Custom Objects

You can now set conditional stage properties for your custom object pipelines. If you're using a custom object pipeline, you can ensure the appropriate information is collected at each stage of your business process by setting conditional or required properties by pipeline stage.

### Use Case

This allows you to customize which properties are presented to users when a custom object moves to a specific stage in your pipeline for better data collection at the right time.

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Launch region: Global



## CRM Platform

# Advanced Formula Editor for Calculated Properties

The advanced formula editor for calculated properties is a powerful tool that allows you to take your data and turn it into vital business context with ease. You can now create custom calculations to suit your specific business needs.

### Use Case

Whether you're analyzing sales data, tracking customer behavior, or measuring the effectiveness of your marketing campaigns, the Advanced Formula Editor can help you gain deeper insights and make informed decisions.

[Learn More](#)

Free

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Launch region: Global

The screenshot shows the 'Edit property' dialog box in HubSpot CRM. The 'Field type' tab is selected, and 'Equation' is chosen. The formula bar displays the following logic: `if (First Name == "Yes", Total Revenue + 4567, 23)`. The result type is set to 'NUMBER'. The dialog also includes a 'Label' field with the text 'Test calculation property 3', an 'Assign Users & Teams' button, and 'Save' and 'Cancel' buttons at the bottom.

## CRM Platform

# Improved Notification Emails for Comments left in the CRM

Email notifications for comments have been upgraded to provide customers with more details and context directly in the received notification emails.

**Subject lines:** We have updated the subject lines for the emails to support better threading. The subject line for these emails now includes details of the records where comments are placed which ensures comment notifications related to the same record are grouped together in email clients such as Gmail.

**More detail:** The notifications now include up to the 5 most recent comments on a thread, along with details of the comment authors and timestamps each comment was posted. The notification will specify what type of activity the comment was posted on and the name of the record where the comment appears.

**Notification logic:** We notify the creator of the activity being commented on, any users who previously commented on the thread will be notified of new comments, and any user at-mentioned in a comment. We do not send notifications to the author of a comment.

[Learn More](#)

Free

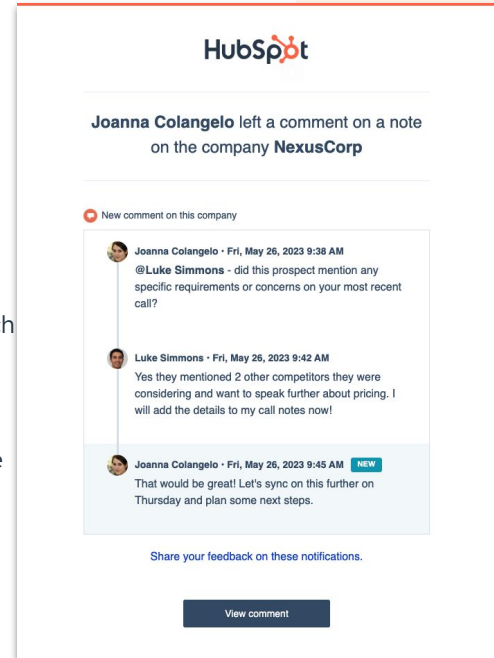
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## CRM Platform

# Curate Your Own Educational Playlists in HubSpot Academy

HubSpot Academy Playlists allow you to curate HubSpot Academy lessons and courses into playlists and share them with other users. Playlists can even be shared with users outside of your HubSpot account.

### Use Case

HubSpot Academy Playlists is for:

- Managers onboarding large teams to HubSpot
- New hires familiarizing themselves with HubSpot software and terminology
- Admins curating HubSpot best practices and sharing them with their team
- Students and professionals looking to change roles or learn new job responsibilities
- Power users looking to share their favorite content with users outside of their organization

[Learn More](#)

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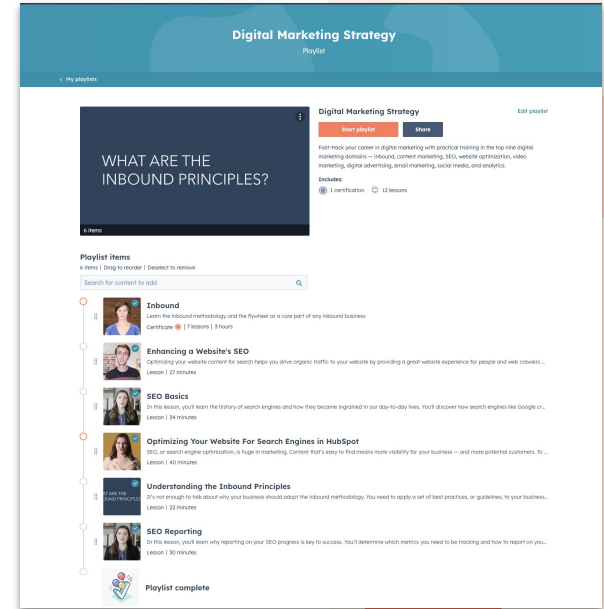
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Launch region: Global



## CRM Platform

# Updated Conditional Stage Property Modal Experience

An update to the modal that is surfaced when you edit deal stage, ticket status, or custom object pipeline stage properties in the record page.

**View All Properties:** When you edit the stage or pipeline in the 'View all properties' section of the record page, a modal surfaces to prompt you to fill in additional property information based on Conditional Stage Properties that have been set in Pipeline Settings.

**Highlight Card and Association Card:** When you edit the stage or pipeline in the highlight card or association card on the record page, a modal surfaces to prompt you to fill in additional property information based on Conditional Stage Properties that have been set in Pipeline Settings.

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Launch region: Global

**Inline Editing on Index Pages:** When you inline edit the stage or pipeline on the index page, a modal surfaces to prompt you to fill in additional property information based on conditional stage properties that have been set in pipeline settings.

**Index Page Board View:** When you edit the stage on the board view, a modal surfaces to prompt you to fill in additional property information based on Conditional Stage Properties that have been set in Pipeline Settings.

## CRM Platform

# CRM Development Tools to Build UI Extensions with React as Front-End

Developers with access to Sales or Service Hub Enterprise can now use CRM development tools to build UI extensions (custom cards) based on a new technology stack with React as frontend. These extensions can be displayed on the middle column tab or the sidebar of the record page.

### Use Case

This allows developers to build custom cards that are flexible, dynamic, and interactive. The choice of this technology stack makes it so that customers can have entirely custom yet immersive user interfaces built on top of HubSpot and that matches cohesively with the the UX that HubSpot is known for. They can build complex integrations, multi-step business processes on top of HubSpot to solve their unique business needs and scale their businesses.

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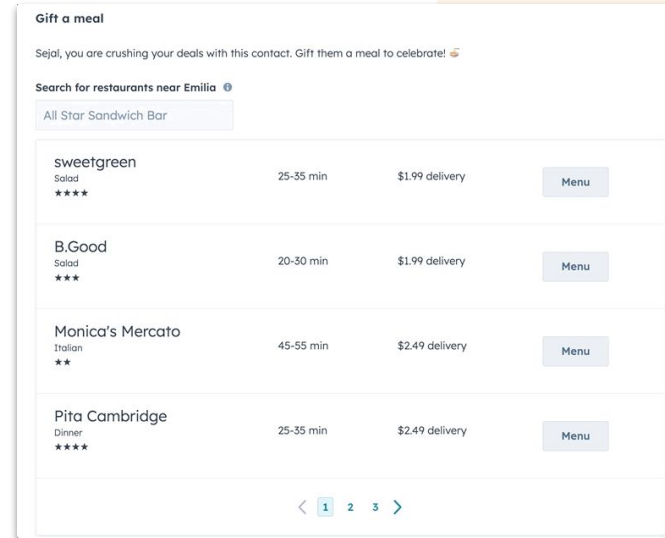
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# CRM Platform

## CRM Record Page Editor

The CRM record page editor allows admins to easily customize the middle column of a record to match their business' needs. Admins can now add new cards and tabs to the record page, so their teams have access to the right information at the right time.

### Use Case

HubSpot customers use the record page to display information that's critical to their business. The page editor allows admins to customize the content and layout of the record. Through this customization admins can provide their teams with the right information at the right time, helping them be more efficient, effective, and deliver a better experience for their customers.

[Learn More](#)

Free

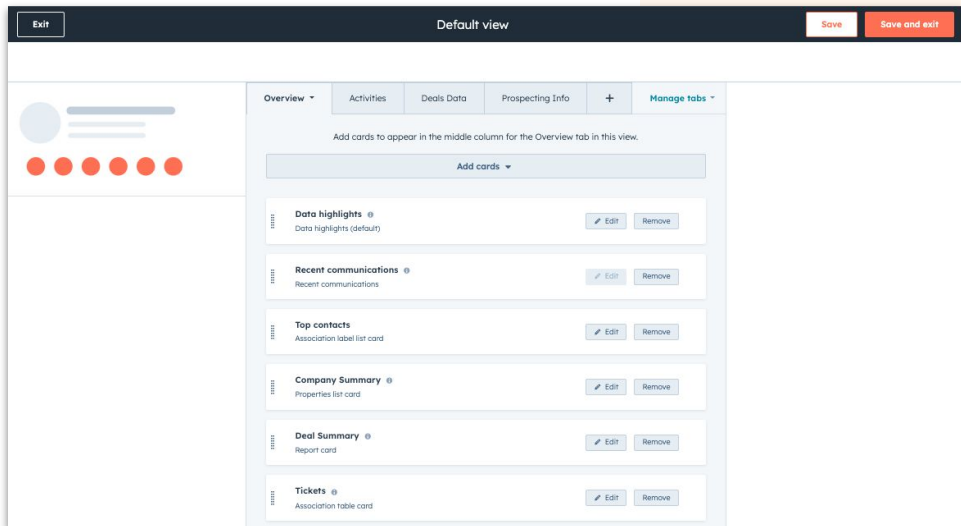
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Launch region: Global





## CRM Platform

# Property Source Information is now available in property history exports

We've added additional information to the property history export to tell you which user and tool triggered a property change within the CRM. Previously, this export only provided you with the different values that records in the CRM have had for that property, and the date at which that value changed.

### Use Case

By including property source information in this export, you'll now have all the information at your fingertips to understand what users and tools within HubSpot are making changes to your data. This will increase confidence in the quality of your data, and help you take proactive steps to prevent unexpected changes from impacting your data again.

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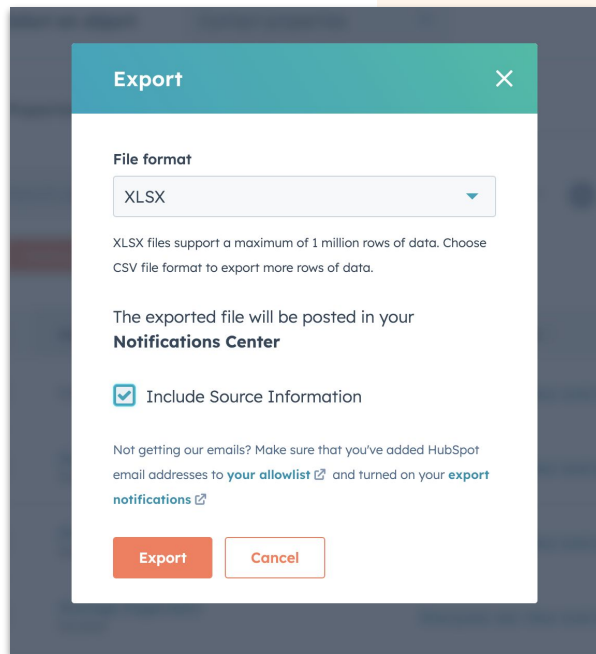
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## CRM Platform

# Global Toolbar Above HubSpot Nav, with a more discoverable Search

A new toolbar on top of the current nav will pave the way to enable persistent access to utility items like Calling & Help, and increase discoverability to an expanded Global Search box that replaces the previous search icon.

### Use Case

In order to pave the way to enabling the persistence of actions like Calling and Help that customers may need to stay open as they navigate across HubSpot, we're adding a horizontal bar on top of the nav's primary menu.

Also, up until now customers have struggled to find and harness the power of a HubSpot-wide Global Search. With the utility items and profile dropdown moving to a new toolbar, Global Search has become more discoverable as an expanded bar in the primary navigation menu.

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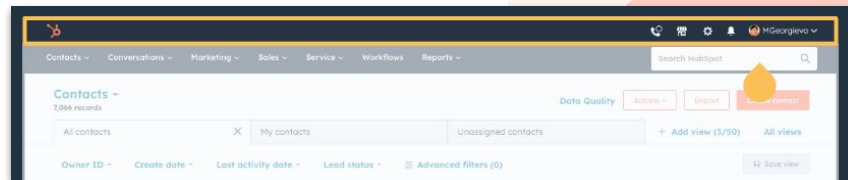
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## CRM Platform

# New “Personal email access” permission

You can now restrict the ability of a user to connect a personal email to HubSpot.

### Use Case

For users, being able to connect your email to HubSpot is a critical part of onboarding. However, it's not necessary for everyone. Previously, every user had access to connect. It's essential that administrators know how to prevent users from connecting when needed because connecting results in users logging email data, which can result in contact creation and property updates.

[Learn More](#)

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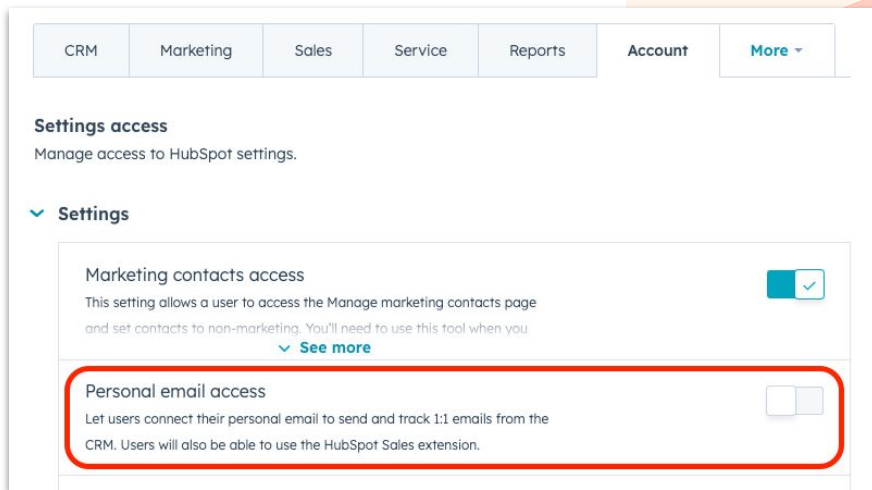
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Launch region: Global



## CRM Platform


# Surfacing Account Limit for Lists


We previously announced an increase to all subscriptions' list limits. Unfortunately, it has never been easy to tell what that limit actually is, or how close an account is to reaching that limit.

Now, when a user selects which list type they want to create, they will see the number of lists available to them.

[< Back to lists](#)

Create a list

**Contact-based**  
Create a list of Contact records

**Company-based**  
Create a list of Company records

List name \*

What kind of list are you creating?

☒ **Active list** 2,051 of 2,500 used

Active lists automatically update over time. Records will join or leave the list as their properties change.

☐ **Static list** 552 of 2,500 used

Static lists do not automatically update as your records change. A static list represents a single moment in time.

What kind of list are you creating?

☒ **Active list** 10 of 10 used

Active lists automatically update over time. Records will join or leave the list as their properties change.

☐ **Static list** 9,001 of 1,000 used

Static lists do not automatically update as your records change. A static list represents a single moment in time.

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Launch region: Global

## CRM Platform

# Log Emails to the CRM Retroactively

The ability to log an individual email from your inbox with the click of a button.

### Use Case

Salespeople sometimes forget to log their emails to the CRM or feel the need to log them without having to wait for replies from prospects. This feature solves these issues by enabling retroactive email logging, meaning users can log emails to the CRM even after they have been sent, without relying on replies or existing email threads.

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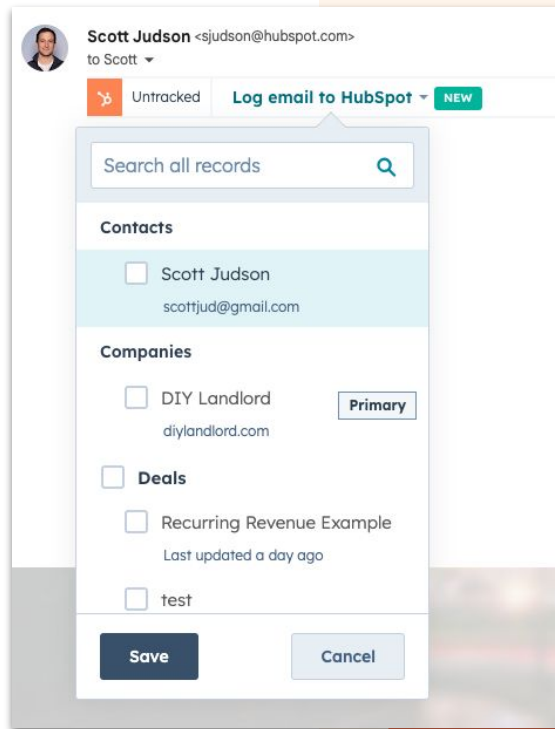
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## CRM Platform

# Support for “OR” Filtering On Many Marketing Assets

Following on from the [release in CRM earlier this year](#), we're excited to share that it is now possible to use "OR" filtering in several marketing tools. This makes it possible to create far more customisable and more useful filtering to drill in to find the exact records you're looking for.

This is supported in Marketing Campaigns, Lists, Workflows, Forms, the new CTAs tool, and Feedback Survey responses.

### Use Case

With this update it's now possible to filter by several different sets of filters to find marketing assets where "A" OR "B" is true.

Free

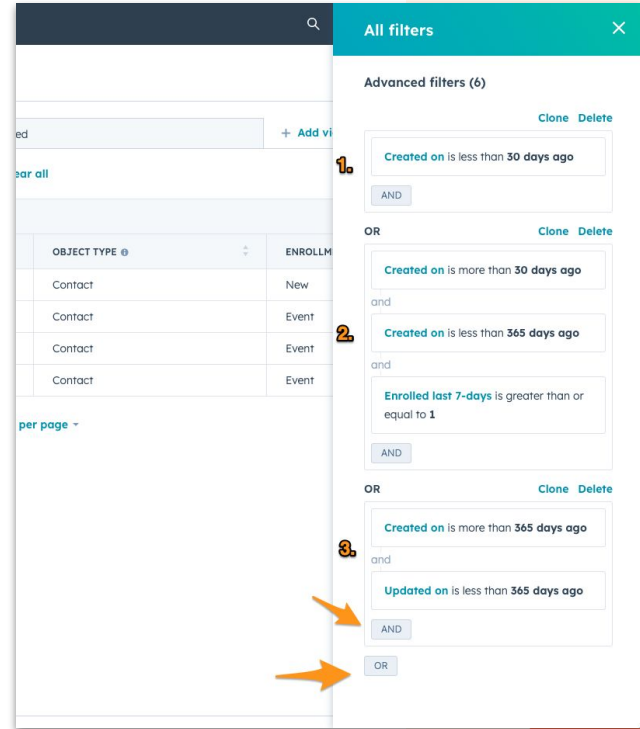
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# CRM Platform

## Side Panel with Metadata - Centralized Audit Log of User Actions

New functionality in the existing [Audit Log UI](#) with additional information (metadata) about the user action event.

### Use Case

This update enables you to view more details about changes made to the data without having to navigate to another part of the account.

[Learn More](#)

Free

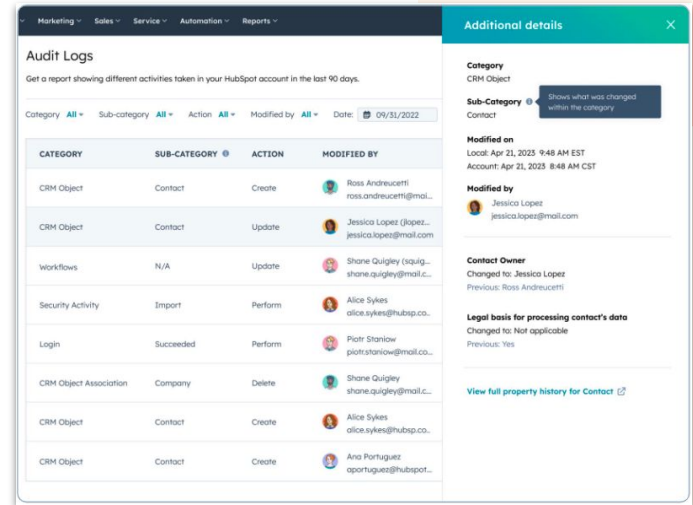
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## CRM Platform

# Centralized Audit Log of Security and Login Activity

With this new tool, Super Admins can view a centralized real-time audit log of their users' login activity, and security-related actions that users have taken in the account.

### Use Case

With this new UI, Super Admins can view a centralized real-time audit log of their users' login activity, and security-related actions that users have taken in the account.

**Audit Logs**  
Get a report showing different activities taken in your HubSpot account in the last 90 days.

Category: **All** Subcategory: **All** Action: **All** Modified by: **Alice Sykes** Date: **01/05/2023** to **11/07/2023** [Clear filters](#) [Export report](#)

Category	Subcategory	Action	Modified By	Date of Change	Source
Property		Succeeded	Perform	Alice Sykes asyles@hubspot.com	17 May 2023 06:21 EDT <a href="#">Account Login History</a>
Login		Succeeded	Perform	Alice Sykes asyles@hubspot.com	21 Jun 2023 11:04 EDT <a href="#">Account Login History</a>
CRM Object		Succeeded	Perform	Alice Sykes asyles@hubspot.com	10 Jul 2023 06:37 EDT <a href="#">Account Login History</a>
CRM Object Association		Succeeded	Perform	Alice Sykes asyles@hubspot.com	11 Jul 2023 12:10 EDT <a href="#">Jessica Lopez Herrera</a>
Security Activity		Succeeded	Perform	Alice Sykes asyles@hubspot.com	11 Jul 2023 12:11 EDT <a href="#">Ross Andreucetti</a>
Security Activity		Succeeded	Perform	Alice Sykes asyles@hubspot.com	11 Jul 2023 12:12 EDT <a href="#">2669850</a>

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Launch region: Global



## CRM Platform

# Find Custom Objects by Partially Typing Custom Property Value

Custom objects can now be found through their custom properties by only partially typing the value in the custom property. You can either type the text you remember from the beginning OR from the end of the custom property and Global Search will try to match with custom properties that have that keyword in their prefix or suffix and return the relevant custom objects.

### Use Case

Type the text you remember from the beginning OR from the end of the custom property and Global Search will find the custom object before you are done typing.

Free

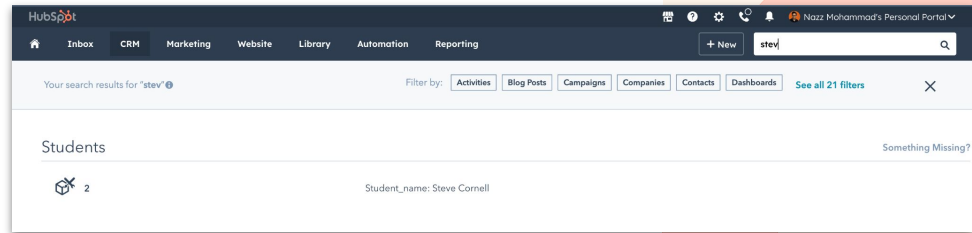
Starter

Pro

Ent

Live

Launch region: Global



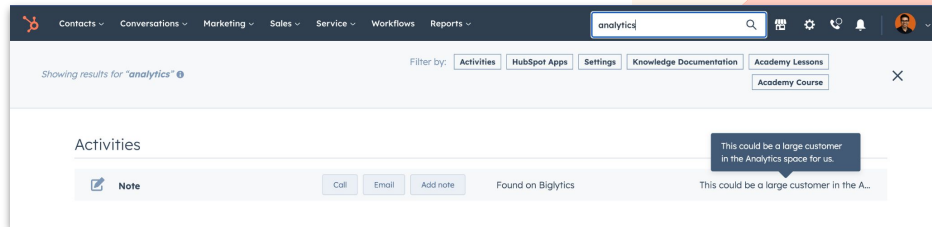
## CRM Platform

# Find Notes by the Note Content

Now, you can find notes on any CRM record (contacts, companies, deals, tickets) by searching on the content of the note as you can see below.

### Use Case

Type the name of the feature or a part of the bug summary and be able to find the note on that ticket instantly using Global Search.



Free

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Live

Launch region: Global

## CRM Platform

# Rounding for Custom Calculated Properties

Rounding for custom calculated properties allows you to now round number values to the nearest whole number or decimal place.

### Use Case

With this update, you can now have more accurate results and streamline your workflows. Whether you're working with financial data, statistical analysis, or any other calculations, our rounding options provide the flexibility and precision you require without the need for any painful workarounds.

Free

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Live

Launch region: Global

Create a new property

✓

BASIC INFO

○

FIELD TYPE

### Rounding Total Revenue

Calculation properties allow you to set up custom equations calculating the min, max, count, sum or average between values for properties on associated records. [Learn more](#)

Calculated property type

Round to nearest

The result will round up or down to the specified decimal.

**Top tip:**

if any of the number properties used in a custom equation have no value, the calculated property value will be empty. The value will be empty even if there is a constant number included in the equation.

Number format

Formatted number

Choose the record property

Total Revenue

Decimal places to round to

0

Additional Condition

If this condition is true, we will calculate this property.

< Back

Cancel

Create

## CRM Platform

# New Totals for Quotes

We're introducing a new streamlined totals experience for both merchants and buyers in Quotes.

### Use Case

The new public Quotes equally simplifies the buying experience for our merchant's customers by breaking down each line item by cost, billing frequency, unit price, and notating any discounts, taxes, and fees associated with that transaction, empowering the buyer to quickly and easily note discrepancies or raise questions to their sale rep before signing and payment.

Free

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Live

Launch region: Global

## CRM Platform

# Users with Export Permissions Can Now Only Download the Original Files of Imports They Initiated

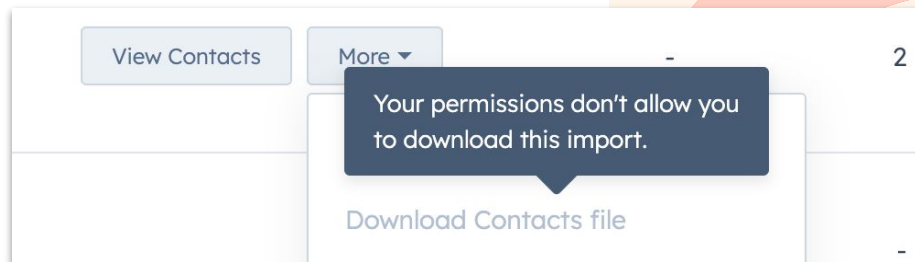
In the past, users with export permissions could download any import file from the import history table. We've recently made a change so that only super admins and the user who initiated the import in the first place are able to download these files.

### Use Case

Limiting who can download these import files will provide admins with more governance and ensure there aren't any backdoor methods reps can use to access and edit data that isn't assigned to them.

[Free](#)[Starter](#)[Pro](#)[Ent](#)[Live](#)

Launch region: Global



## CRM Platform

# HubSpot User Interface & Knowledge Base Now Available in Danish & Norwegian

The HubSpot user interface and knowledge base are now available in Danish & Norwegian.

### Use Case

Native speakers can improve their speed and productivity by switching their UI to their native language. Additionally, collaboration between Danish & Norwegian-speaking customers and teams becomes easier when they have the option to work in HubSpot more comfortably using their native language.

Free

Starter

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Live

Launch region: Global

The screenshot displays two side-by-side panels for the Danish and Norwegian versions of the HubSpot interface. Each panel includes a language dropdown menu (Sprog/Språk) with 'Dansk' and 'Norsk' selected, both marked as 'I BETA'. Below the language menu is a date, time, and number format dropdown (Dato-, klokkeslæt- og talformat / Dato-, tids og nummerformat) set to 'Danmark' and 'Norge' respectively. A format string is shown below each dropdown: 'Format: 27. juni 2023, 27.06.2023, 11:22 BST, and 1.234,56' for Denmark and 'Format: 27. juni 2023, 27.06.2023, 11:23 BST, and 1.234,56' for Norway. At the bottom of each panel is a 'Telefonnummer' (Phone number) section with a text input field containing a Danish flag icon and '+45' for Denmark, and a Norwegian flag icon and '+47' for Norway. Each phone number section also contains a paragraph of text in the respective language explaining how to use the number for contact and security events, with a link to the privacy policy ('læs mere' / 'les mer').

## CRM Platform

# Support for Global Privacy Control

Global Privacy Control (GPC) is a signal that informs a website of visitors' preferences when it comes to selling or sharing personal data. You can now use HubSpot to process GPC signals from your website visitors, which will be used to prevent cookie tracking without requiring visitors to decline your cookie banner.

### Use Case

Comply with new CCPA regulations by allowing website visitors to automatically indicate their preferences when it comes to selling or sharing personal data. The GPC signal is used to prevent cookie tracking without requiring visitors to decline the cookie consent banner.

[Learn More](#)

Free

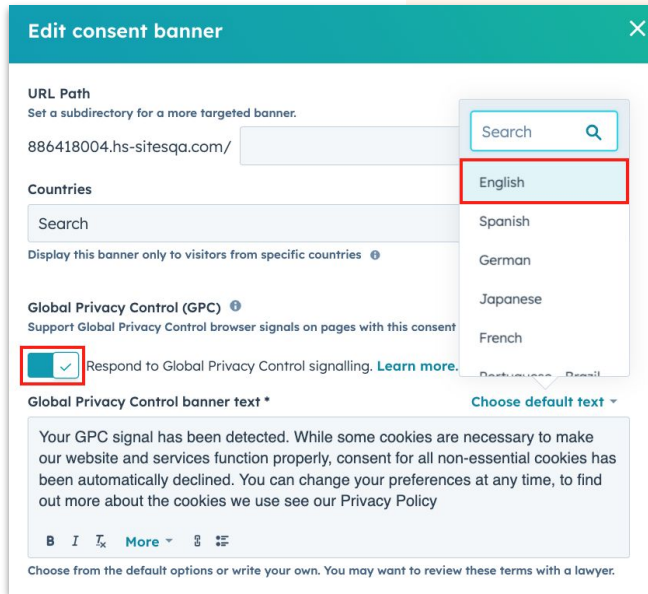
Starter

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Ent

Live

Launch region: Global



**Edit consent banner**

**URL Path**  
Set a subdirectory for a more targeted banner.  
886418004.hs-sitesqa.com/

**Countries**  
Search  
Display this banner only to visitors from specific countries ⓘ

**Global Privacy Control (GPC)** ⓘ  
Support Global Privacy Control browser signals on pages with this consent

☒ Respond to Global Privacy Control signalling. [Learn more.](#)

**Global Privacy Control banner text \*** [Choose default text ▾](#)

Your GPC signal has been detected. While some cookies are necessary to make our website and services function properly, consent for all non-essential cookies has been automatically declined. You can change your preferences at any time, to find out more about the cookies we use see our [Privacy Policy](#)

Choose from the default options or write your own. You may want to review these terms with a lawyer.

## CRM Platform

# Updates to Deleting a Contact

Email confirmation for permanent deletions will now only be sent to the HubSpot user who deleted the contact. This confirmation will be sent automatically.

The names for the two types of contact deletions have also been made more clear – restorable delete or permanent delete – with short explanations for each choice.

### Use Case

To follow data privacy best practices, deletion confirmation emails should come from your business, not a third party such as HubSpot. This change sends you the information you need, so you can send the details to the contact from a business email or related email address.

With more clarity around the names and functionality for each type of deletion, you'll also be able to delete contacts according to the needs of your business.

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Launch region: Global



# CRM Platform

## Filtering Page Views by UTM Parameters in Lists

As a marketer, you rely on UTM parameters to easily track and identify the original source of your website visitors. Creating lists based on who interacted with your UTM-based links allows you to understand performance and engage with those contacts in the best way.

### Use Case

All contacts who have visited the page with or without UTM parameters would be pulled into the list.

[Learn More](#)

Free

Starter

Pro

Ent

Live

Launch region: Global

The screenshot displays the HubSpot CRM interface for configuring a filter. The main heading is "UTM Parameters Page Views". Below it, there's a section for "Active list" with details: "Estimated size: -- contacts" and "Last contact added: June 14, 2023 11:30 AM". The interface is divided into two main panels: "Filters" and "Edit filter".

**Filters Panel:**

- Group 1:** Contains a "Page View" filter with the condition: "has at least one Page View of a URL equal to https://biglytics.com?utm\_source=ppc&utm\_medium=google&utm\_campaign=HubSpotCampaign&utm\_term=example&utm\_content=example". Below this, it specifies "Number of views at least 2 times".
- AND:** A section for adding more filters.
- OR:** A section for adding more filter groups.

**Edit filter Panel:**

- Page view status:** A dropdown menu showing "Contact has viewed at least one URL equal to".
- Standard:** A radio button option.
- UTM only:** A radio button option, which is selected.
- URL:** A text input field containing "https://biglytics.com".
- Source:** A dropdown menu with "ppc" selected.
- Medium:** A dropdown menu with "google" selected.
- Campaign:** A dropdown menu with "HubSpotCampaign" selected.
- Term:** A dropdown menu with "example" selected.
- Content:** A dropdown menu with "example" selected.
- Number of views:** A section with a dropdown menu showing "At least" and a text input field containing "2".

## CRM Platform

# Renaming Prospects to Website Visits

With the addition of the prospecting workspace (currently still in public beta) to Sales Hub, we're renaming the prospects tool to "Website Visits" to better distinguish the purpose of the two tools and the functionalities they provide.

Over the coming months, we will be working on integrating the data in the prospects tool (now website visits tool) into the prospecting workspace to help sales teams better source and engage target accounts. Stay tuned.

This is purely a name change. We have made no functional changes to this tool.

Free

Starter

Pro

Ent

Live

Launch region: Global

## App Marketplace & Integrations



## App Marketplace & Integrations

# Automatic Dropdown Mapping in NetSuite Integration

You can now sync dropdown fields between HubSpot and NetSuite. This opens up a variety of use cases for marketers, who use dropdown fields to segment email campaigns, and sales teams, who use dropdown fields to assign leads and report. Want to map HubSpot lifecycle stage to a NetSuite list field? That's now possible.

### Use Case

Previously, you were only able to sync from a dropdown field to a text field. Now, dropdown fields can be synced two-ways and created as truly custom fields in NetSuite.

*\*Operations Hub Starter+ required*

Free

Starter

Pro

Ent

Live

Launch region: Global

✓	Billing Postal Code	One-way sync	Postal Code	Default	Actions ▾	✓
✓	Billing State	One-way sync	State/Region	Default	Actions ▾	✓
✓	Billing Country	One-way sync	Country/Region	Default	Actions ▾	✓
✓	HubSpot Lifecycle Stage	One-way sync	Lifecycle Stage_	Custom	Actions ▾	✓
+ <a href="#">Add a mapping</a>						

## App Marketplace & Integrations

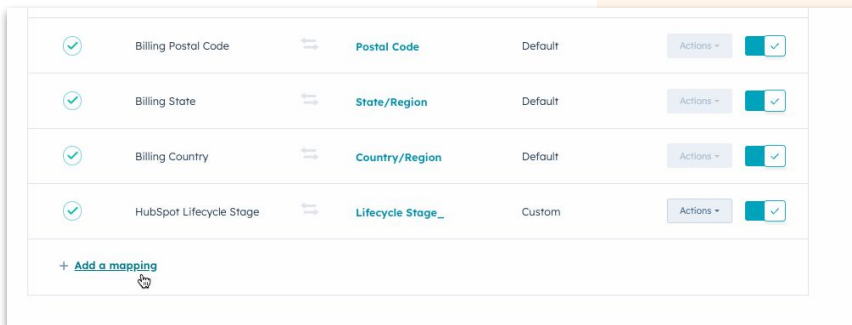
# Automatic Dropdown Mapping in Microsoft Dynamics 365 Integration

Two-way dropdown field sync is now live. Want to map HubSpot Lifecycle stage to a Dynamics choice field? That's now possible.

### Use Case

Marketers use dropdown fields to segment email campaigns and sales teams use dropdown fields to assign leads and report.

*\*Operations Hub Starter+ required*



The screenshot displays a table with four rows of field mappings. Each row includes a green checkmark icon, a HubSpot field name, a Dynamics field name, a mapping type, and an 'Actions' button with a toggle switch. The mappings are: Billing Postal Code to Postal Code (Default), Billing State to State/Region (Default), Billing Country to Country/Region (Default), and HubSpot Lifecycle Stage to Lifecycle Stage\_ (Custom). Below the table is a '+ Add a mapping' link with a mouse cursor pointing to it.

✓	Billing Postal Code	Postal Code	Default	Actions - <input checked="" type="checkbox"/>
✓	Billing State	State/Region	Default	Actions - <input checked="" type="checkbox"/>
✓	Billing Country	Country/Region	Default	Actions - <input checked="" type="checkbox"/>
✓	HubSpot Lifecycle Stage	Lifecycle Stage_	Custom	Actions - <input checked="" type="checkbox"/>
<a href="#">+ Add a mapping</a>				

Free

Starter

Pro

Ent

Live

Launch region: Global

## App Marketplace & Integrations

# Sync Activities One-Way from Microsoft Dynamics 365 to HubSpot

Activities are the newest object to be added to the Microsoft Dynamics 365 integration, alongside Contacts, Companies, Deals, Invoices and the Product library.

You can now sync calls, tasks, emails and notes from Microsoft Dynamics 365 to HubSpot.

### Use Case

The newly added activities appear as object syncs that can be configured separately, in the very same way that syncs are setup for companies, contacts, etc.

Free

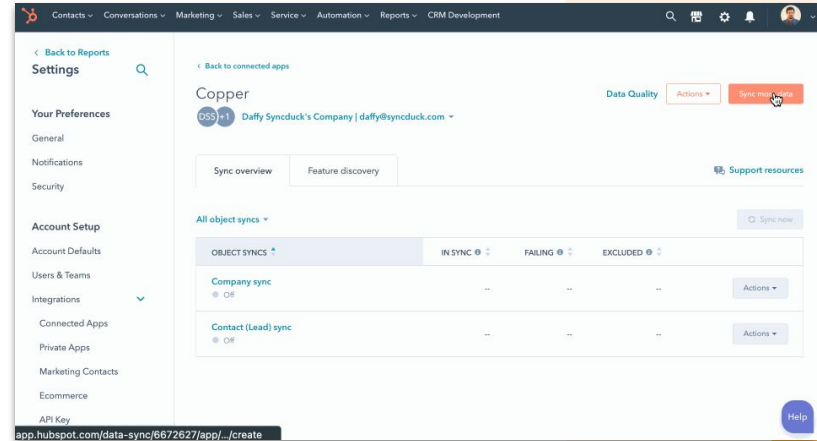
Starter

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Live

Launch region: Global



## App Marketplace & Integrations

# Sync NetSuite Assembly and Kit/Package Items with Product Sync

The ability to sync Assembly Items and Kits/Packages from NetSuite to the HubSpot product library - two way.

### Use Case

Wait, I thought we already synced NetSuite Items to HubSpot's Product Library?

We do but we only supported Inventory Items, Non-Inventory Items, and Service Items. With this release we've added two more types: Assembly Items and Kit/Package Items.

[Learn More](#)

Free

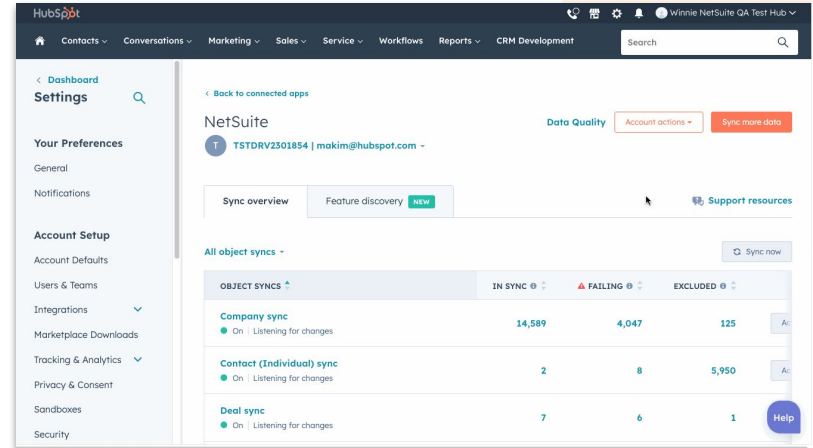
Starter

Pro

Ent

Live

Launch region: Global



## App Marketplace & Integrations

# A new way to share HubSpot reports and dashboards in Slack

HubSpot allows you to export reports in a few different ways. With recent enhancements to the [Slack app for HubSpot](#), you can now share HubSpot reports, dashboards, and recurring updates to a specific Slack channel.

### Use Case

Slack is where teams are most productive. Sharing HubSpot reports and dashboards in Slack keeps teammates connected and informed without disrupting their flow of work.

[Learn More](#)

Free

Starter

Pro

Ent

Live

Launch region: Global



## App Marketplace & Integrations

# Aircall Conversation Intelligence Integration

Aircall has officially launched [their integration](#) with HubSpot's Conversation Intelligence and coaching tools. Now, Aircall customers can listen to their Aircall recordings, view call transcripts, create playlists, and coach their team right within HubSpot.

### Use Case

Now, teams can review calls, offer coaching, and receive coaching, all within HubSpot.

This will also unlock the power of features like snippet sharing (all Sales and Service plans) and tracked terms, which enable teams to analyze conversation topic trends over time and skip right to the most important moments of calls (Sales and Service Enterprise only). With this change, team members who do not have an Aircall account will be able to review recordings associated with contacts that they have permission to view, fostering cross-team collaboration.

Free

Starter

Pro

Ent

Live

Launch region: Global

## App Marketplace & Integrations

# Create Tasks and Tickets with the Microsoft Teams integration

You can now create HubSpot tasks and tickets via [HubSpot's Microsoft Teams integration](#) and seamlessly associate them with HubSpot records--all from within Microsoft Teams.

### Use Case

Customers can quickly turn Microsoft Teams conversations into follow-up actions in HubSpot all from within Microsoft Teams. Customers collaborating in Microsoft Teams can quickly create a HubSpot task to follow up with a customer or create a HubSpot ticket about an issue a customer is facing without skipping a beat.

[Learn More](#)

Free

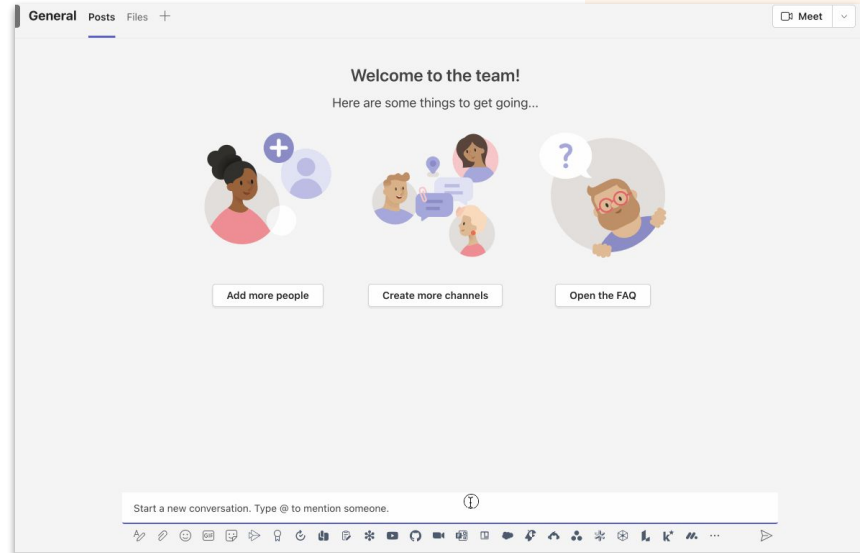
Starter

Pro

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Live

Launch region: Global



## App Marketplace & Integrations

# Associate multiple HubSpot Deals & Companies with one Slack Channel

Associating HubSpot company/deal records with a Slack channel helps teams create a dedicated space to collaborate over key accounts and sync activity-related alerts to provide meaningful insights across stakeholders. Now, teams can create associations between multiple deal/company records and one Slack channel, consolidating activity updates and collaboration.

### Use Case

Now, users can associate multiple records with the same Slack channel.

[Learn More](#)

Free

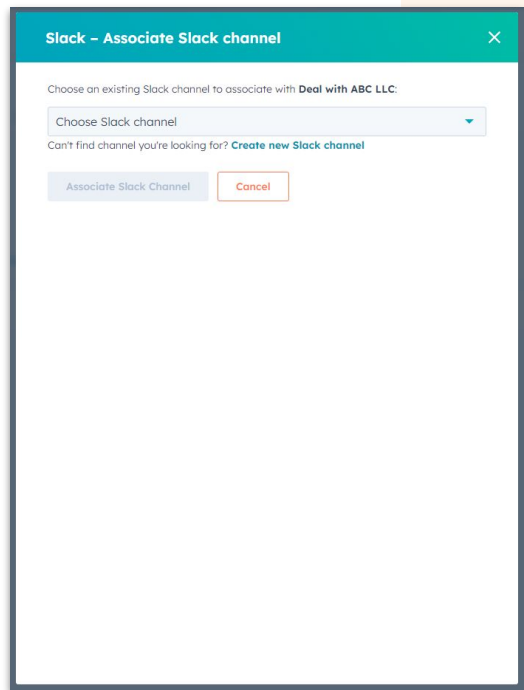
Starter

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Launch region: Global



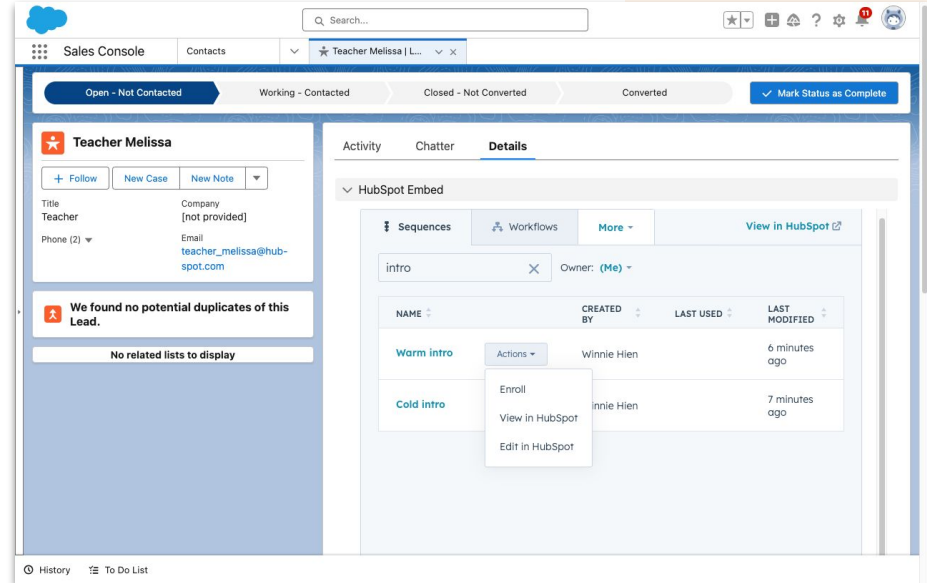
## App Marketplace & Integrations

# Enroll in a HubSpot Sequence from Salesforce

You can now enroll in a HubSpot sequence directly from within Salesforce.

### Use Case

If you're using Salesforce as your CRM and HubSpot for prospecting, you can now enroll in a sequence directly from Salesforce through the HubSpot Visualforce window. No need to jump back and forth between HubSpot and Salesforce.



Free

Starter

Pro

Ent

Public Beta

Launch region: Global

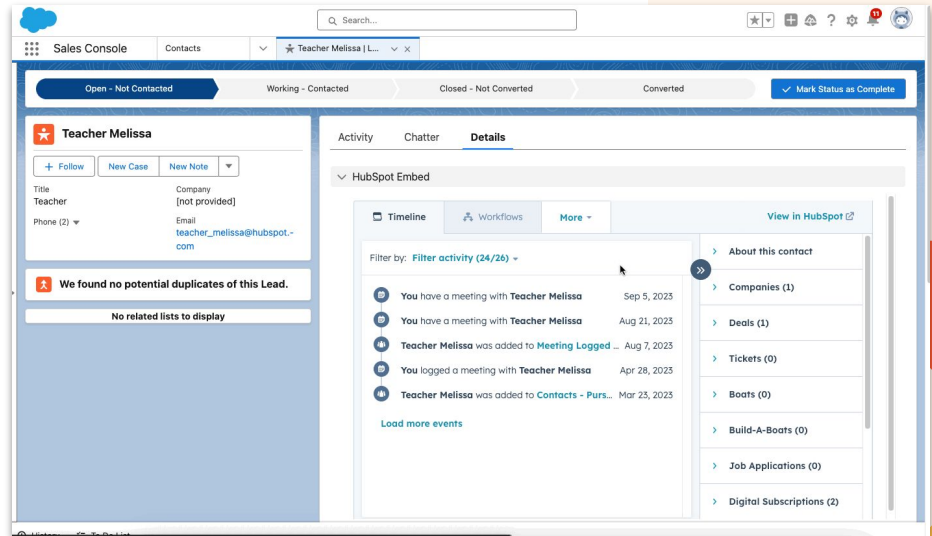
# App Marketplace & Integrations

## A new way to book HubSpot meetings from Salesforce

If you're a Salesforce and HubSpot customer, you can now schedule a HubSpot meeting directly from a contact or record without leaving Salesforce.

### Use Case

We work across so many tools, and connecting those tools is essential to our productivity! Skip all the back-and-forth between HubSpot and Salesforce, and stay in your work flow by simply booking a HubSpot meeting without leaving Salesforce.



Free

Starter

Pro

Ent

Public Beta

Launch region: Global

## App Marketplace & Integrations

# Bulk Import NetSuite & Dynamics 365 Users

Import NetSuite or Dynamics 365 users in bulk into HubSpot.

### Use Case

Getting started with HubSpot for the first time? Say goodbye to entering emails one by one or exporting a CSV to upload users into HubSpot.

There's an easy way to add all of your sales reps into HubSpot to get them up and running faster - import your users in bulk.

Free

Starter

Pro

Ent

Live

Launch region: Global

Create users

EMAIL PERMISSIONS INVITE

Step 1 of 3

### Create a bunch of new users at the same time

Add a new user to your HubSpot account with an email address.

Add email address(es) ⓘ

Or create multiple users at once.

Create multiple users at once. Import their info from your integration app records.

Cancel Next >

## App Marketplace & Integrations

# Associate HubSpot Deals with Microsoft Teams Channels

[Microsoft Teams app](#) users can now associate HubSpot company and deal records with channels, creating a dedicated space to share information and collaborate with teammates on key accounts.

### Use Case

Boosting account details visibility and aligning cross-functionally drives strategic growth in both sales and marketing. With these recent enhancements to the Microsoft Teams app for HubSpot, teams can create dedicated channels and sync information between systems to stay in the loop and sell better.

Free

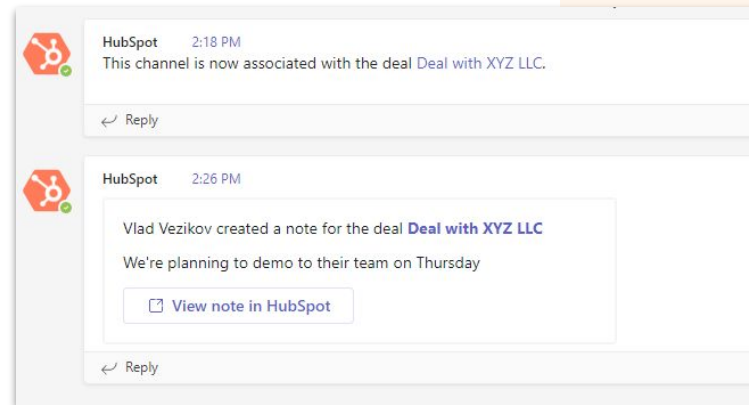
Starter

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Launch region: Global



## App Marketplace & Integrations

# Sales Playbooks in the HubSpot App for Zoom Meetings

The HubSpot App for Zoom Meetings now has playbooks. This gives your sales team the ability to do all of the following within a Zoom call:

- Use any available playbooks in HubSpot
- Log and track data to the HubSpot contact record
- Search for and view existing HubSpot contacts
- Associate the playbook with the contact record in HubSpot

### Use Case

Reps can access their playbooks within the Zoom app and read or update all the relevant CRM information while keeping their attention pointed at the buyer.

Free

Starter

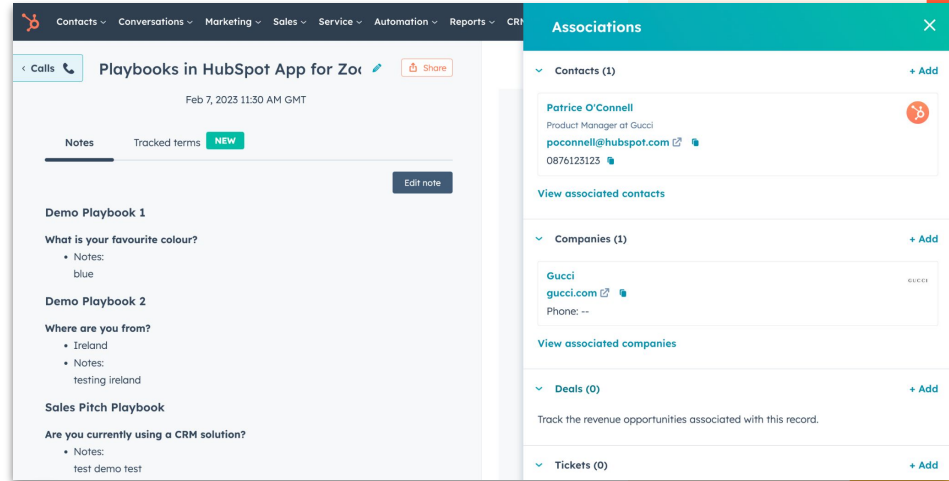
Pro

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Live

Launch region: Global

*\*\*[HubSpot App for Zoom Meetings](#) is available to all HubSpot users. Playbooks are only available in Sales Hub Professional or higher and Service Hub Professional or higher.*







# Thank you