HubSpot Product Updates

(October 2023 Updates)

HubSpot

Product Update of the Month

Associate Records of the Same Object Type

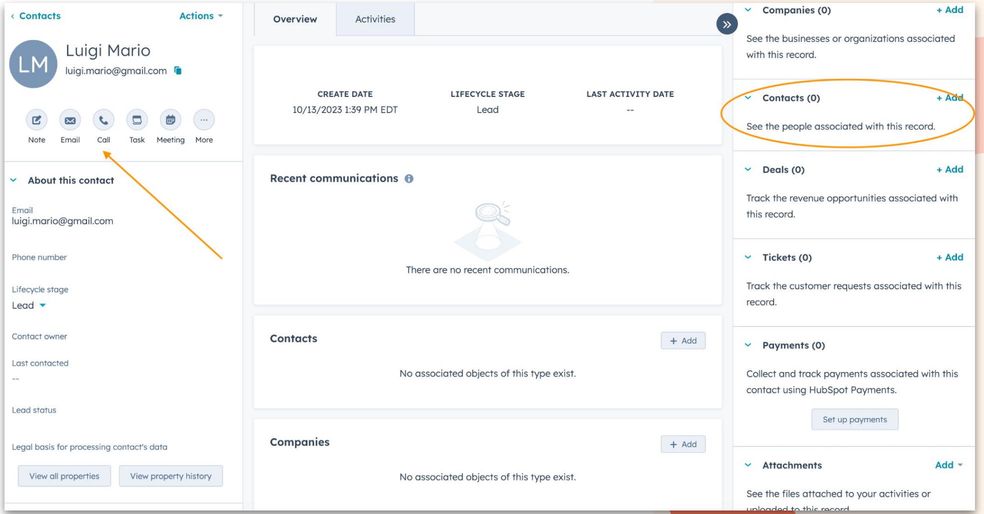
Same object associations give customers the ability to associate a CRM record to another record of the same object type e.g. a contact to a contact or a deal to a deal. These new associations are available for contacts, companies, deals, tickets and custom objects and can be leveraged across core HubSpot tools.

Use Case

Create associations between records of the same type for contacts, companies, deals, tickets and custom objects. For example, a customer may raise a ticket with a Support team, and then the Support team would need to raise a ticket internally in a different Ticket pipeline to action the Customer's request. Now, you can associate the customer Ticket with the internal Ticket to ensure full visibility to resolution.

Free | Starter | Pro | Ent | Public Beta

Launch region: Global



Marketing Hub™

Marketing Hub™

Manage subscription types and statuses across Business Units

Manage subscription types and statuses across business units is now finally live! You can manage your subscription types separately across your business units, so contacts unsubscribing from one business unit are still subscribed to the others in your portal.

Use Case

Manage and communicate across multiple brands inside the same portal

Free Starter **Pro** **Ent** **Live**

Launch region: Global

Marketing Hub™

Assign Business Units to Workflows

With business units, customers can manage multiple brands in one HubSpot account. The feature ‘business units’ is only available for Marketing Hub Enterprise customers with the Business Unit add-on.

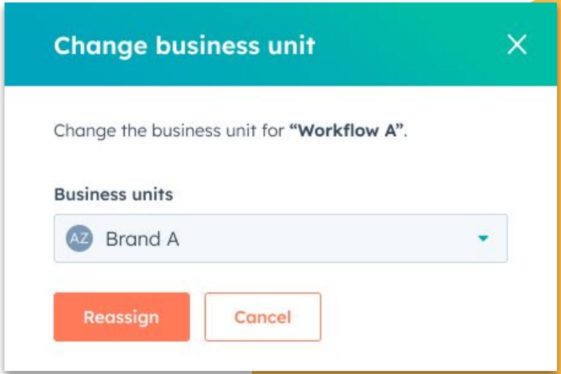
Use Case

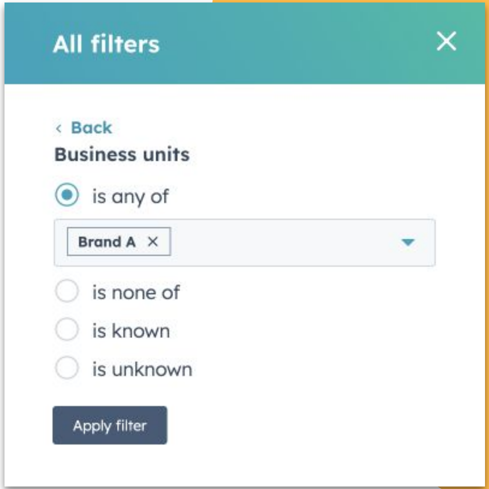
This is a more streamlined way to filter and organize your workflows based on different business units. This simplifies the process of distinguishing and managing your marketing automation efforts across multiple business units or brands, making it easier to maintain clarity and efficiency in your workflow management.

[Learn More]

Free Starter Pro Ent Live

Launch region: Global





Marketing Hub™

Marketing Single Send API

The Marketing Single Send API will enable customers to integrate externally hosted data with marketing emails designed and maintained directly in HubSpot.

Use Case

Now customers can effortlessly integrate external data with HubSpot's email marketing, leverage HubSpot's content creator and sending infrastructure while incorporating customizations from external databases. Plus, automatically trigger personalized emails based on actions from externally hosted websites or blogs, opening a new world of data possibilities within HubSpot's platform.

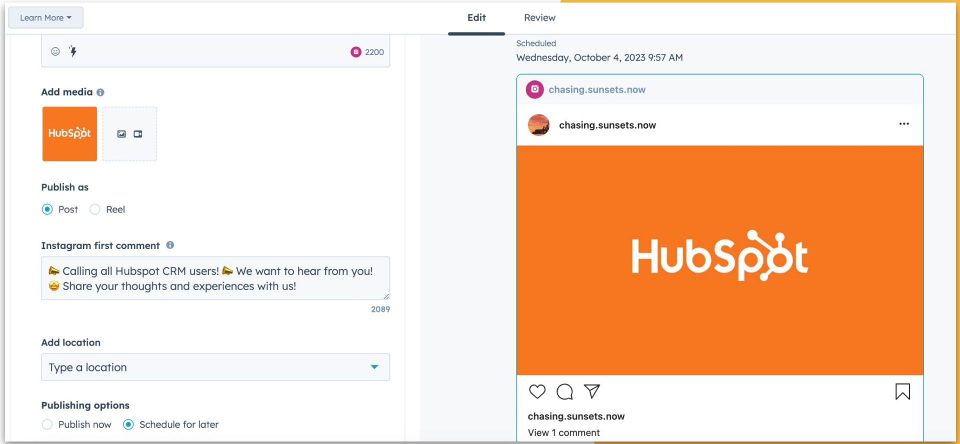
Free Starter Pro **Ent** **Public Beta**

Launch region: Global

Marketing Hub™

Instagram First Comment Support

With First Comment Support, you can now schedule the first comment on your Instagram posts. A successful Instagram post includes a strong caption and relevant hashtags but space is limited. You can use the first comment to interact with users directly, improve engagement with further hashtags and grow your reach on Instagram.



Use Case

- You provide further description about your product or service
- ask your audience questions and encourage conversation in the comment section
- include further hashtags that do not crowd your post caption and will help you optimize reach.

Free Starter Pro Ent Live

Launch region: Global

Marketing Hub™

Facebook CAPI for Instant Forms Migration

HubSpot has expanded our integration with Facebook's Conversions API. The Conversions API is designed to create a direct connection between your marketing data and the systems which help optimize ad targeting, decrease cost per action and measure results across Meta technologies. Now you can send any HubSpot lifecycle stage change event data back to Meta as a conversion in an easy to use integration.

Use Case

- Reduce your cost per action as a result of improved connectivity
- Improve measurement
- Reduce your cost per action as a result of increased event matching

Learn More

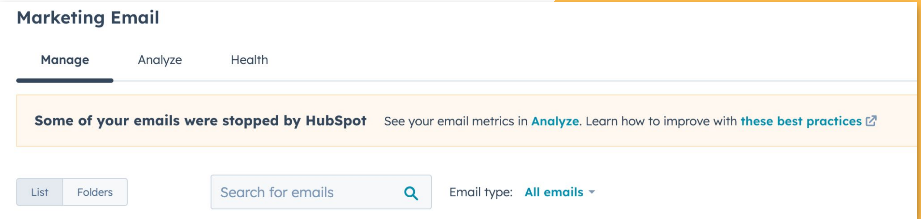
Free Starter **Pro** **Ent** **Public Beta**

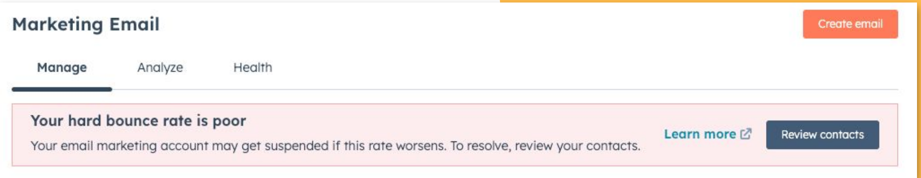
Launch region: Global

Marketing Hub™

Email Probation Redesign

We have redesigned the Probation banners, enhancing their wording, offering a clear indication of the severity of the situation, and providing more guided support on how to resolve this state. Furthermore, the redesigned feature explicitly communicates its purpose, which is to safeguard a portal's health and serve as an early warning sign of deterioration.





Use Case

This ensures that customers gain a thorough understanding of their deliverability performance and the implications of not improving it.

[Learn More]

Free | Starter | Pro | Ent | Live

Launch region: Global

Marketing Hub™

Customer Journey Analytics now supports Campaign Filtering

Customer journey analytics now includes a campaign filter, which will lets you hone in on touchpoints that came from a certain campaign. For example, if you only want to include page views, form submissions, and email clicks that are associated with a campaign, you can select that campaign in the event filter when you are creating your report.

Use Case

Customer journey analytics filtering now supports campaign filtering to help you better understand how your specific marketing efforts are helping you achieve your goals.

[Learn More]

Free Starter Pro **Ent** **Live**

Launch region: Global

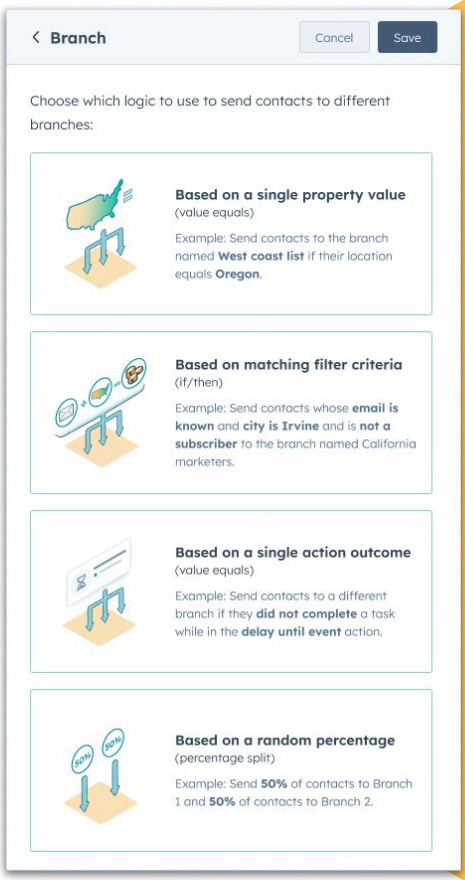
Marketing Hub™

Random Split Branch in Workflows

Customers can now use workflows to randomly split enrolled records into evenly sized groups for workflow experimentation.

Use Case

This new functionality opens up a world of possibilities for marketers to experiment with different channels and tactics. For example, marketers looking to encourage leads to sign up for an event, could send half of the eligible attendees an email and half of them an SMS, to see which strategy results in more registrations.



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Launch region: Global

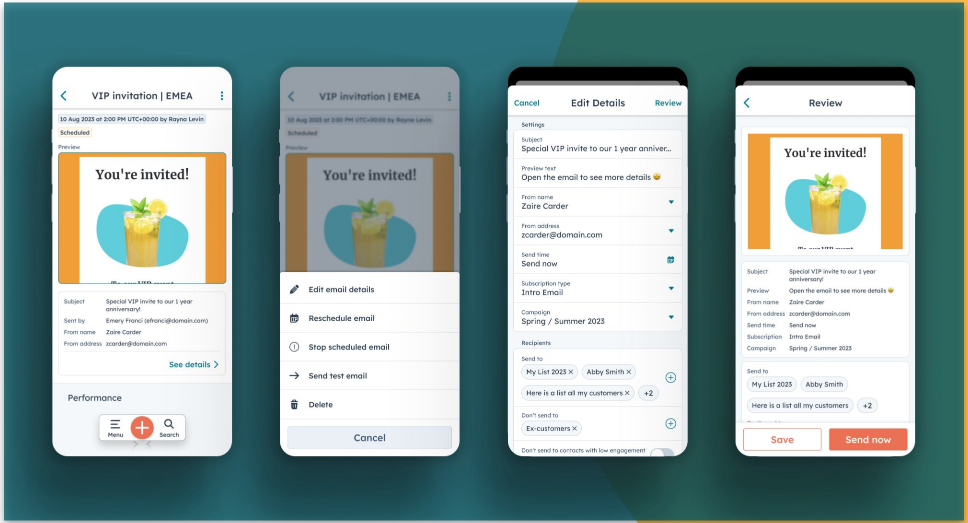
Marketing Hub™

Edit Your Marketing Emails on Mobile

Marketers can go a step further and edit, schedule and send their Regular, Automated, Blog, RSS, Follow-up and Timezone marketing emails.

Use Case

By enabling Marketing Email on the app, we empower marketers with a cross-platform experience that helps them to control and manage their communications.



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Launch region: Global

Marketing Hub™

Merging Task data in Activity reports

We are making some updates to start including Publishing Task (aka Campaign Task) data under Activity Type = Tasks in Activity Reports. Given the low discoverability of the Publishing Task option and low volumes of created Publishing Tasks, we plan to remove this as a filter option in Activity Reports and merge Publishing Tasks into the Tasks dataset.

This will give us a single source of truth for task data within a HubSpot portal and allow all tasks to be retrieved through the Activity Type = Task filter regardless of where they were created in HubSpot. (Note: any tasks created through the separate Projects tool in HubSpot are not available for reporting)

These changes will apply in both the single-object report builder and the custom report builder.

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Launch region: Global

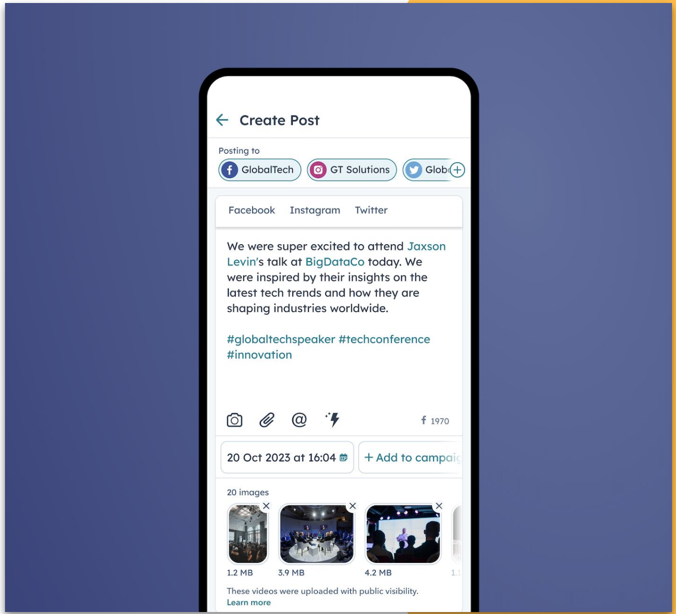
Marketing Hub™

Publish richer Facebook posts on Mobile

Marketers can now include 20 images in their Facebook social media posts from mobile.

Use Case

Removing the old limitation of four images allows marketers to create richer content on the social network and share more compelling stories.



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Launch region: Global

Marketing Hub™

Create better LinkedIn posts, with videos and more images from mobile

In this last Mobile Social update, you can publish videos to your personal LinkedIn accounts and create posts with more than 4 images.

Use Case

Video content is a great way to increase brand awareness, site traffic and ultimately generate leads. You can now plan and schedule all video content for LinkedIn company and personal pages.

And the same applies when it comes to social posts with visual content. The richer the content is visually, the higher engagement it gets. Now, you can include more than 4 images in your posts to share more compelling stories.

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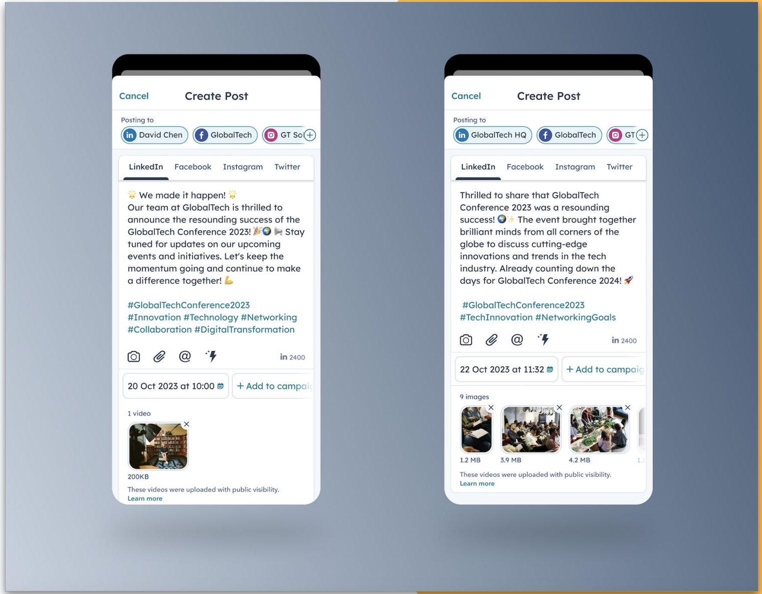
Launch region: Global



Marketing Hub™

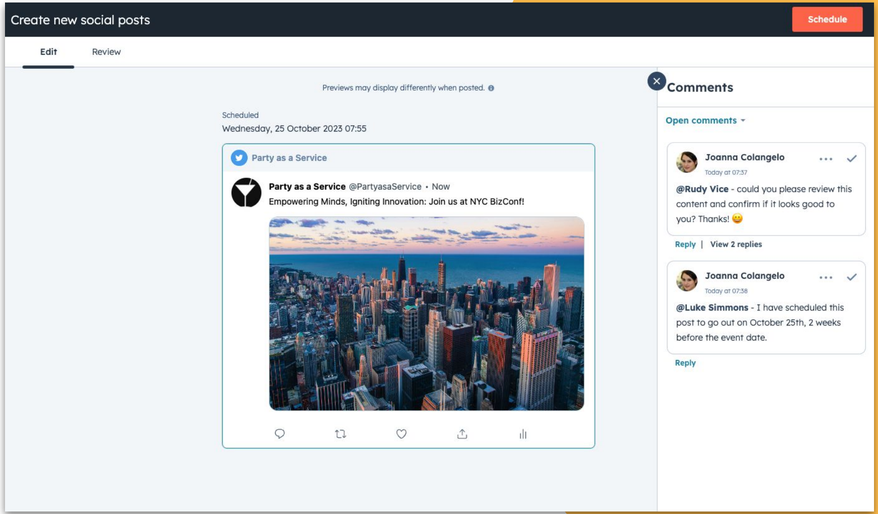
Collaboration sidebar in the Social tool

The Collaboration sidebar is now part of the Social tool.

Customers can now comment on individual draft Social posts within HubSpot, create tasks for themselves or colleagues and view their Marketing Calendar all while editing a Social post.

Use Case

Adding the collaboration sidebar into the Social tool allows these conversations to happen seamlessly within HubSpot while holding all relevant context easily accessible when needed.



[Learn More]

Free Starter Pro Ent Public Beta

Launch region: Global

Marketing Hub™

Build lists filtered by a WhatsApp subscription status

Customers can create static or dynamic lists based on WhatsApp subscription status (opted in, not opted, opted out).

This is at parity with current email list segmentation experience.

Use Case

Create a list of all of your opted-in (not opted, or opted out) WhatsApp contacts to use as part of workflows, to create WhatsApp campaigns, and to help build business insight.

**also available to Service Hub Pro+ customers*

Free Starter Pro Ent Live

Launch region: Global

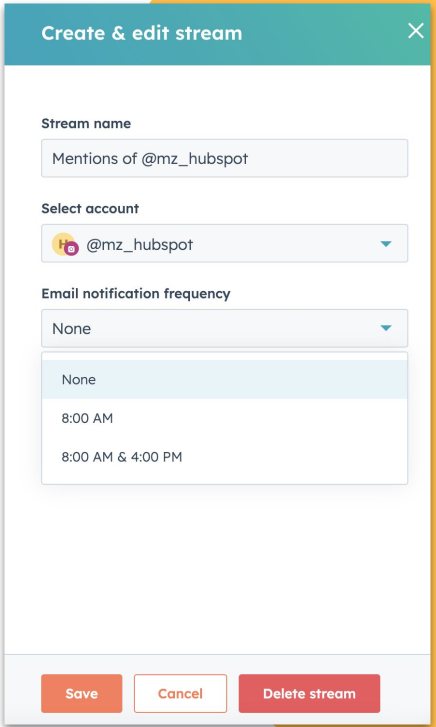
Marketing Hub™

Email notifications for Instagram @mentions

Customers can now set up email notifications for when their brand is @mentioned on Instagram.

Use Case

Users will receive daily email notifications whenever they're mentioned in an Instagram post or comment. This feature ensures they will never miss a moment and allows them to engage more effectively with their Instagram audience.



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Launch region: Global

Marketing Hub™

Add Static Lists to your Campaigns directly from Lists

We have added a new 'Add to campaign' functionality to the Lists tool (more specifically: contact-based static lists) allowing you to speed up your processes. This new option allows you to add your lists to new and existing campaigns in HubSpot.

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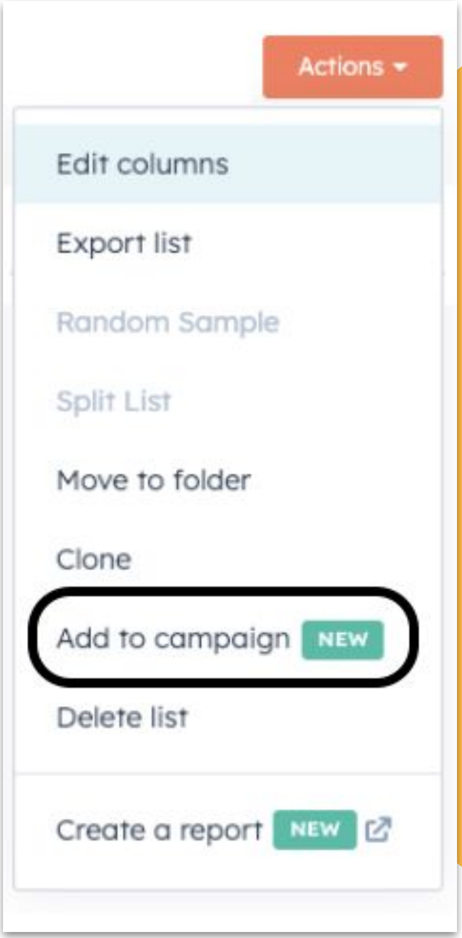

Marketing Hub™

Rolling date ranges & new card design in Journey Analytics

When you are building a report in Journey Analytics, you now have two date range options. You can choose a static range, where the date range will be fixed, or you can choose a rolling date range.

Additionally, we're bringing more insights into how your report is constructed with our re-designed staging cards.

Use Case

You can now use a rolling date range for Customer Journey reports. This is helpful for ongoing analysis of a particular journey, as it also means you won't have to go into the report and update the date range.

[Learn More]

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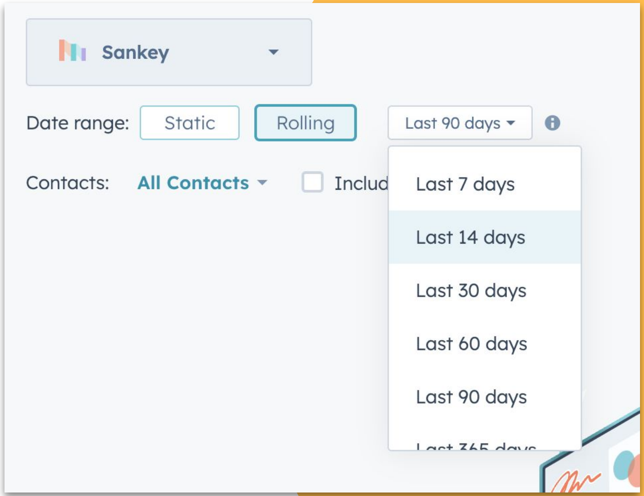
Launch region: Global



Marketing Hub™

Build lists filtered by an SMS subscription status

Customers can create static or dynamic lists based on SMS subscription status (opted in, not opted, opted out).

Use Case

Create a list of all of your opted-in (not opted, or opted out) SMS contacts to use as part of workflows, to create SMS campaigns, and to help build business insight.

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Launch region: Global

CMS Hub®

HubSpot

CMS Hub®

Automated Registration Email Follow-Up for Private Content

In private content settings, HubSpot users will now be able to set an automated registration email follow-up, which will automatically send emails to contacts who have not completed account registration. This is important because until the contact's registration is completed, the contact will be unable to access private content.

Use Case

By enabling this setting, users will no longer have to manually resend registration emails to contacts that have not registered. This new setting is an automated way to ensure that more contacts are able to complete registration, boosting engagement with private content and reducing support time.

Learn More

Free Starter Pro **Ent** **Live**

**also available to Service Hub Pro+ customers*

Launch region: Global

CMS Hub®

Options for Contacts to Download or Delete their Data

You can now add modules so contacts can request to download or delete their personal data stored by you in HubSpot. When added, information about how to request a download or deletion of personal data will appear on a contact's email subscription preferences page. You can decide whether to make these choices available to your contacts.

Use Case

Businesses can now provide a centralized place for contacts to proactively manage their data and consent for communications. This helps you to follow data privacy laws and best practices, streamline processes, and build trust with your contacts and customers.

Free Starter Pro Ent Live

Launch region: Global

CMS Hub®

Stage Detached Clone

With the content staging tool, you can redesign and relaunch your website and landing pages in a staging environment. You can redesign and replace existing HubSpot-hosted pages, or create new pages from scratch. Now, you'll also be able to clone existing HubSpot-hosted pages, and publish them as brand new pages.

Use Case

Be able to more quickly create new pages as a clone from an existing page and publish them as brand new pages.

Learn More

Free Starter Pro Ent Live

Launch region: Global

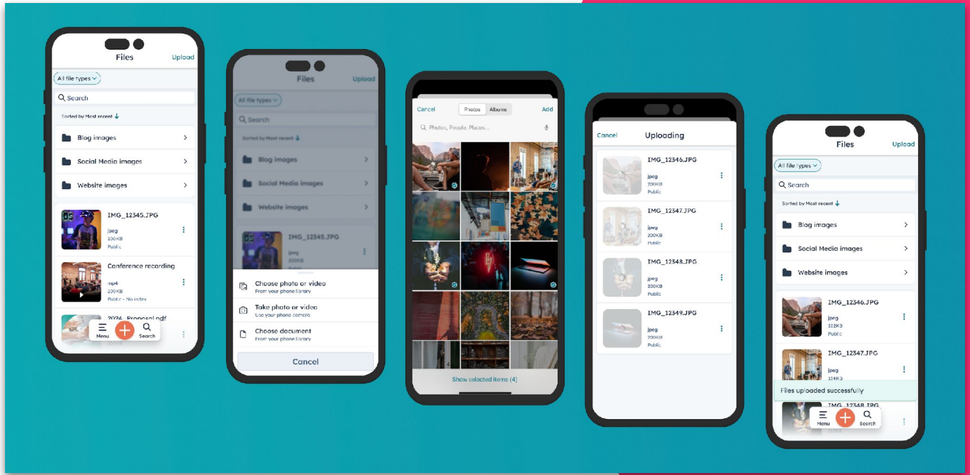
CMS Hub®

Access and Manage Your Files on Mobile

In this first iteration, you are able to upload, preview, save, download, share and move to trash your files plus upload your content in Files.

Use Case

By enabling Files on the app, we empower you, our users, to upload, download and manage your files in one place and on the go.



Free Starter Pro Ent Live

Launch region: Global

CMS Hub®

Blog Posts Default Module

We're excited to announce the launch of our new Blog Posts module, designed to enhance your blogging experience. This upgraded version replaces the existing Blog Listing module and brings a whole new level of functionality.

Use Case

This new module modernizes development by leveraging Javascript and React technologies, resulting in improved website and module performance. With the module's code being rendered on the server, you can expect a smoother and more efficient blogging experience.

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Launch region: Global

Marketing Hub™ + CMS Hub®

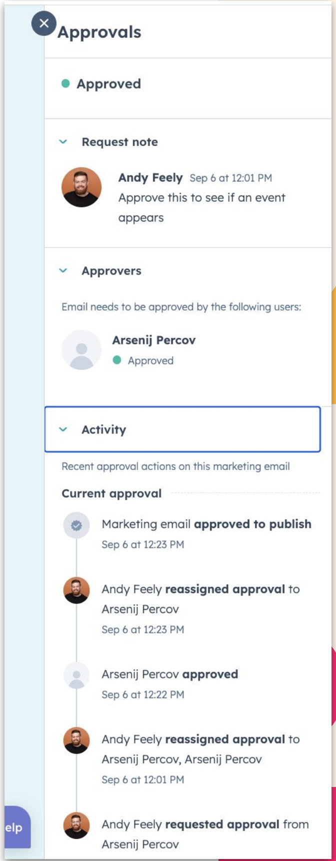
Marketing Hub™ + CMS Hub®

Approvals Activity in Collaboration Sidebar

You can now keep track of approvals activity in the collaboration sidebar. In the approvals tab of the collaboration sidebar, the activity section describes any activity related to approvals. This feature is automatically available to all customers who have approvals enabled in their portal.

Use Case

Optimize collaboration when working on content



[Learn More]

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Launch region: Global

Marketing Hub™ + CMS Hub®

Drag and Drop Version of the Collaboration Sidebar

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

This includes:

- Ads
- Blog
- Campaigns
- Landing pages
- SMS
- Website pages

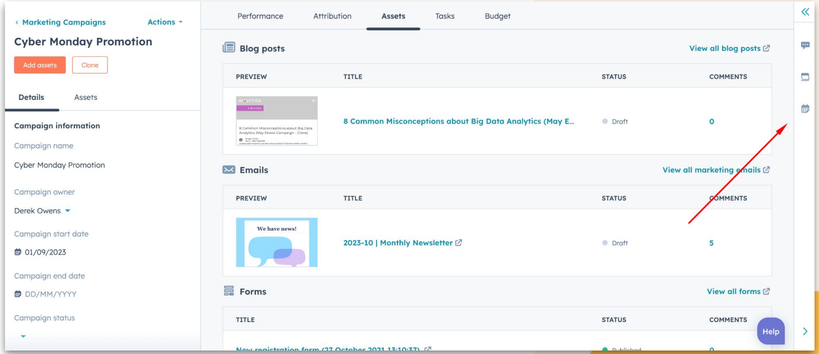
Use Case

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

Free Starter **Pro** **Ent** **Live**

Launch region: Global

BEFORE:



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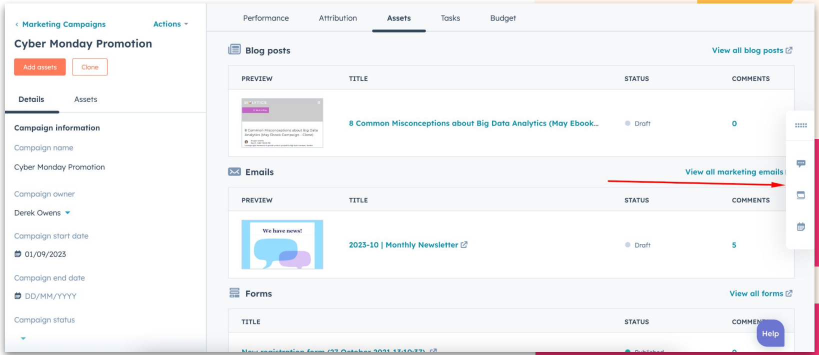


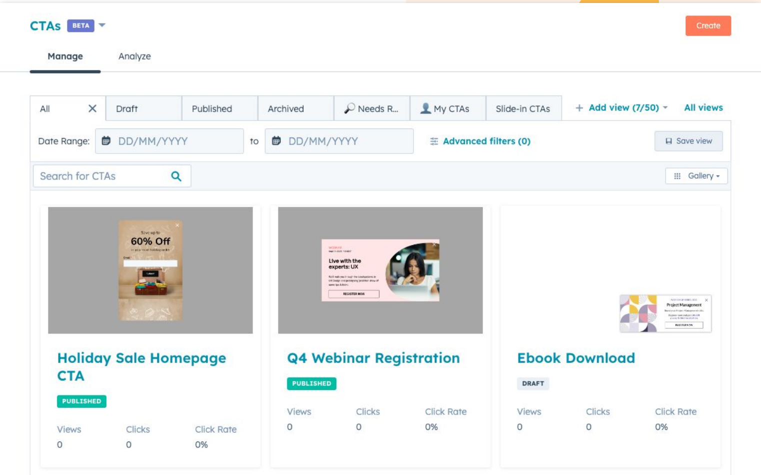
HubSpot

Marketing Hub™ + CMS Hub®

Saved Views and a new Gallery mode for CTAs

Saved Views provides a quick way to drill down to the exact CTAs you're looking for and focus on your draft CTAs, recently published, CTAs you created, and any sort of grouping you can think of. CTAs brings the most up-to-date set of features for filtering/views too including AND/OR filtering, improved view management and a brand new "Gallery" mode.

Gallery mode takes the standard table layout and creates a more visual layout focusing on the preview images of CTAs, alongside the standard name, status and performance information.



Use Case

Saved views for CTAs enables customers to filter all their CTAs by the "Advanced filters" available, and save that set of filters as a view for themselves, their team or for everyone in their portal.

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Launch region: Global

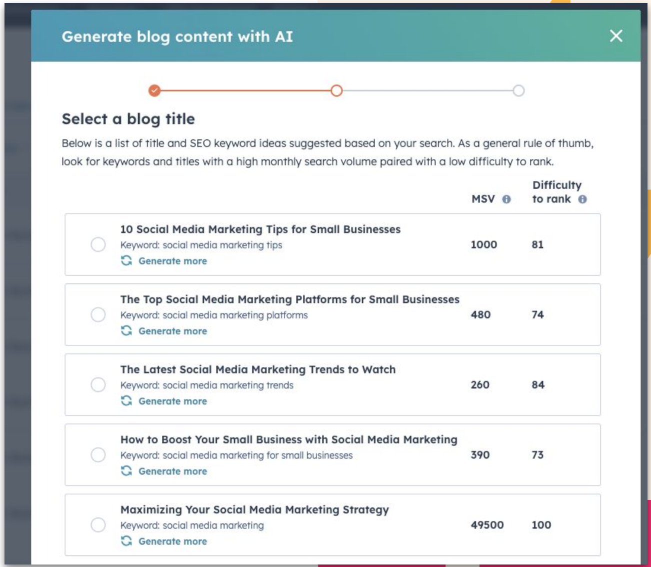
Marketing Hub™ + CMS Hub®

AI Assistant: Blog Post Generator

A new content idea generation tool for blog designed to bust blank page syndrome and help you get started with blogging. Powered by ChatGPT (and keyword data from Semrush for Pro+ customers), this tool makes it easy to generate full blog posts. Simply enter a description of a broad topic you are interested in getting more ideas about, and HubSpot will provide more specific ideas and blog titles that may resonate with your audience. We will show SEO data for the titles and their target keywords in Marketing and CMS Professional and Enterprise portals to indicate how popular they are on Google and how hard to rank for to help you maximize results.

Use Case
This tool aims to accomplish a few things:

- Help content creators save time on getting started with blog posts
- Act as a brainstorming tool and help overcome writer's block by providing fresh ideas
- Make it easier to select content ideas that have a higher chance of performing and resonating with your target audience



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Launch region: Global

***All tiers have access to generate blog posts with AI. Only Marketing Hub and CMS Hub Pro+ have access to Semrush keyword data inside of the tool.*

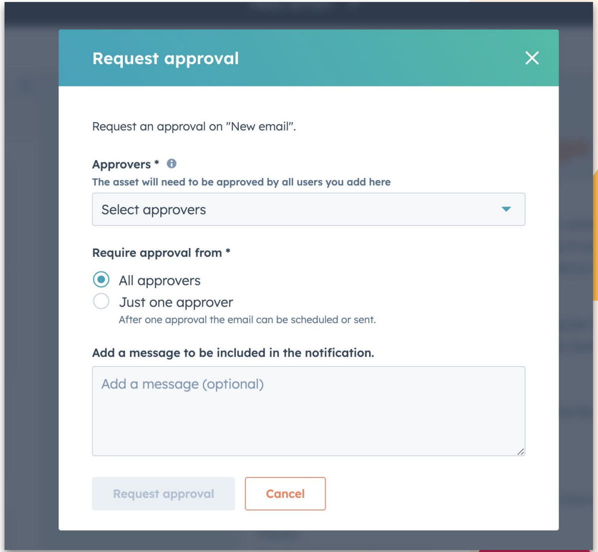
Marketing Hub™ + CMS Hub®

“ANY/ALL” Approvers Rule

Requesters can indicate whether "ALL" or "ANY" approver needs to approve the approval request. If "ANY" rule is selected, then the approval request will be approved after the first approver approves. If "ALL" rule is selected then the approval request will be approved after all approvers approve.

Use Case

Decrease the time to approve by eliminating bottlenecks of some approvers taking too long or being unavailable.



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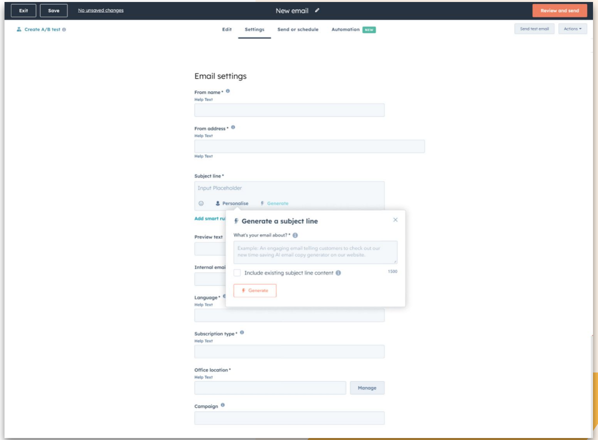
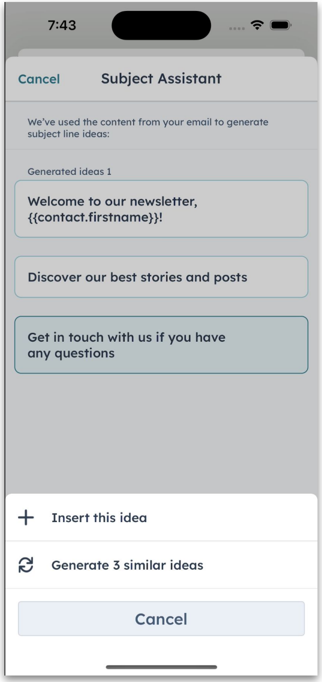
Launch region: Global

Marketing Hub™ + CMS Hub®

AI Assistant: Subject Line Generation

We are excited to announce the release of a HubSpot AI Subject Line Assistant for Marketing Email. Content creators can now easily generate an email subject line for their campaign, complimenting the ability to generate and edit email copy within the Email Editor. Subject line generation will be available on desktop and the HubSpot mobile app for last minute or on-the-go adjustments to your marketing email.





Use Case

The Subject Line Assistant jumpstarts the writing process, helping generate email subject lines in a flash. By automating this process with HubSpot AI, you can focus on other critical tasks and scale and optimise your content creation efforts.

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Launch region: Global

Marketing Hub™ + CMS Hub®

Improved module experience in the blog post editor

The improved module insertion experience in the blog post editor allows you to:

- Drag custom HubL modules
- Clone modules
- Reposition modules
- Copy/paste modules across blog posts

Use Case

Better flexibility with the modules in the editor for quick and easy updates such as repositioning and cloning modules.

Free Starter Pro Ent Live

Launch region: Global

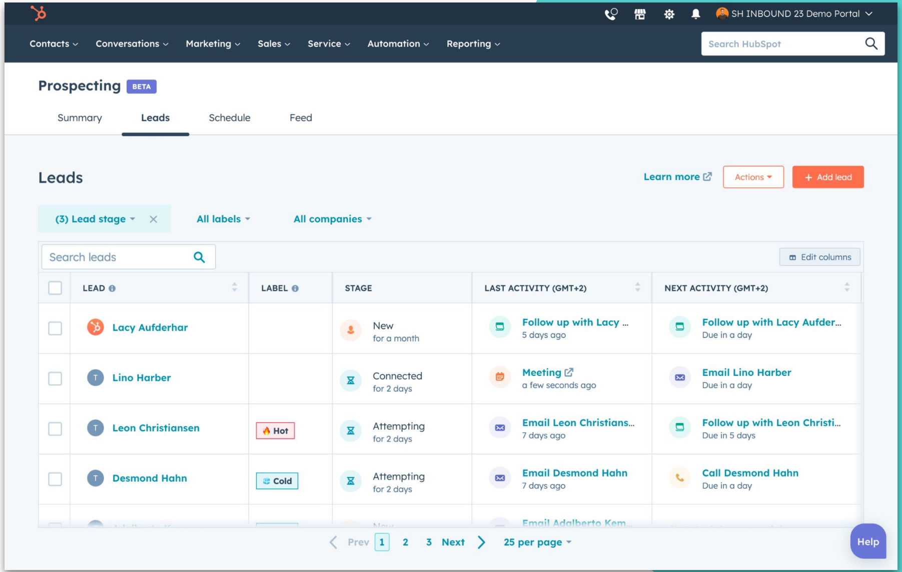
Sales Hub™

Sales Hub™

Lead Management in Prospecting Workspace

HubSpot is adding a new object to Sales Hub called ‘Leads’. Leads transform how sellers can manage prospecting and qualification efforts for both inbound and outbound demand gen motions inside of HubSpot. Managing leads happens from the ‘leads’ tabs inside the prospecting workspace.

Note: Leads do **NOT** replace contacts. Instead, leads are secondary objects (like deals or tasks) that can be associated with contact and/or company records.



Use Case

By adding a leads object to HubSpot, prospecting reps can now organize, prioritize, and engage their leads efficiently all in one place. This leads to a more effective workflow, better connections with prospective customers, and ultimately more pipeline.

Free Starter Pro Ent Live

Launch region: Global

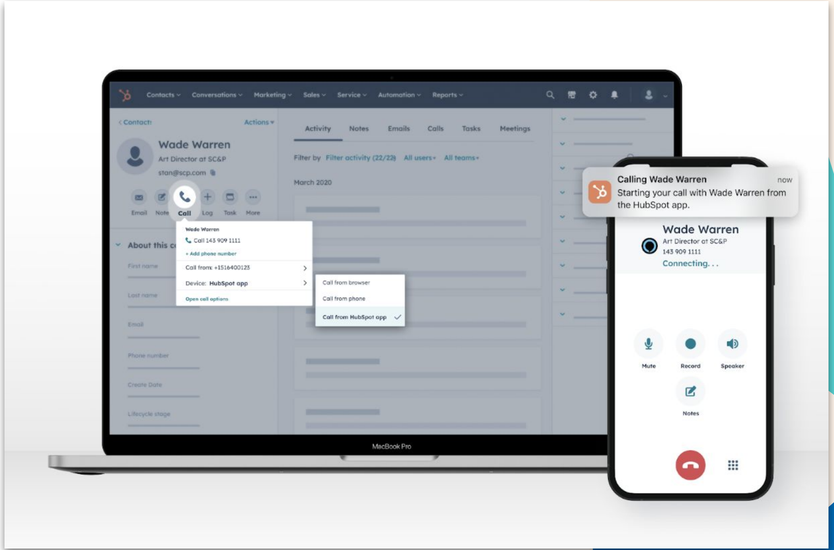
Sales Hub™ + Service Hub™

Call from HubSpot Mobile app

A new third option is now available for reps to initiate calls from HubSpot. "Call from HubSpot app" allows reps to initiate outbound calls through the HubSpot mobile app from any CRM record while working on desktop.

Use Case

The new 'Call from HubSpot app' option now enables reps to directly send the call over to the HubSpot mobile app, enabling the rep to take advantage of the full mobile calling experience from their desk.



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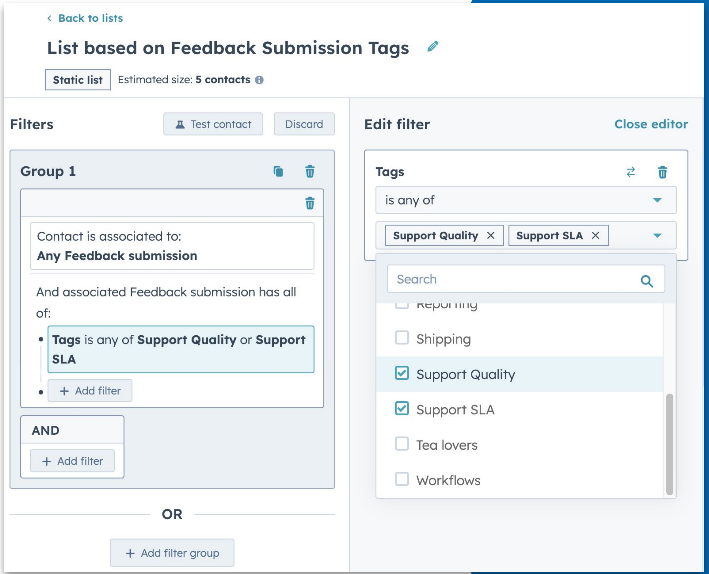
Launch region: Global

Service Hub™

Service Hub™

Feedback Submissions Tagging

With the new tagging feature, you can now create and manage your categories/themes for feedback comments right from within your HubSpot portal. Once you have created your tags, you can apply up to 10 tags to each feedback comment. You can build your own views in the feedback tool using tags as filters. This will also allow you to create lists based on specific tags and you can use those lists to follow up with your customers to address their concerns.



Use Case

Feedback Submissions Tagging allows you to easily categorise your customer feedback so that you can identify the common themes and act on them to address your customers' concerns.

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Launch region: Global

Service Hub™

Sharing a link to Messages in the Conversations Inbox & Help Desk

No more wasted time scrolling through a long conversation to find a specific message!

Introducing message deep linking. You can now copy and paste the link to any message in the Conversations Inbox or Help Desk, and share it with your team for easy reference.

Use Case

Currently, you can only copy and paste a specific thread or conversation in the inbox and help desk, however, you cannot do the same with a specific message. We want to promote better collaboration between teams by enabling an easier path to find a specific message within a conversation.

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Launch region: Global

Sales Hub™ + Service Hub™

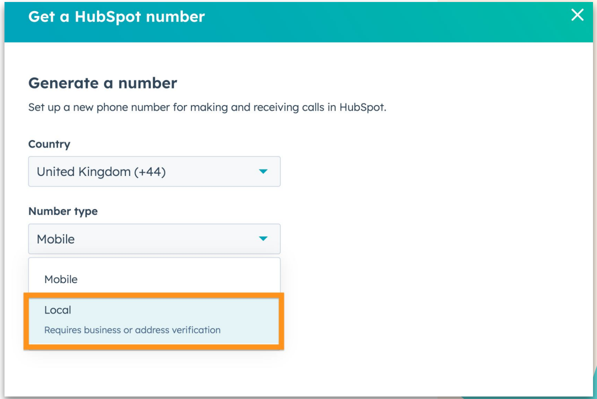
Sales Hub™ + Service Hub™

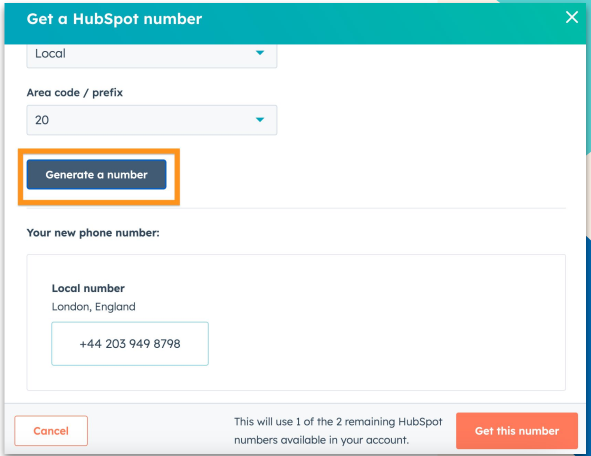
U.K. Local Numbers

Now you can easily acquire local phone numbers for the United Kingdom. This feature is part of our continuous efforts to broaden our global outreach and deliver comprehensive calling features

Use Case

By offering local numbers in the U.K., we empower you to establish a stronger local presence, improve communication with prospects and customers, and ultimately enhance your CRM strategies.





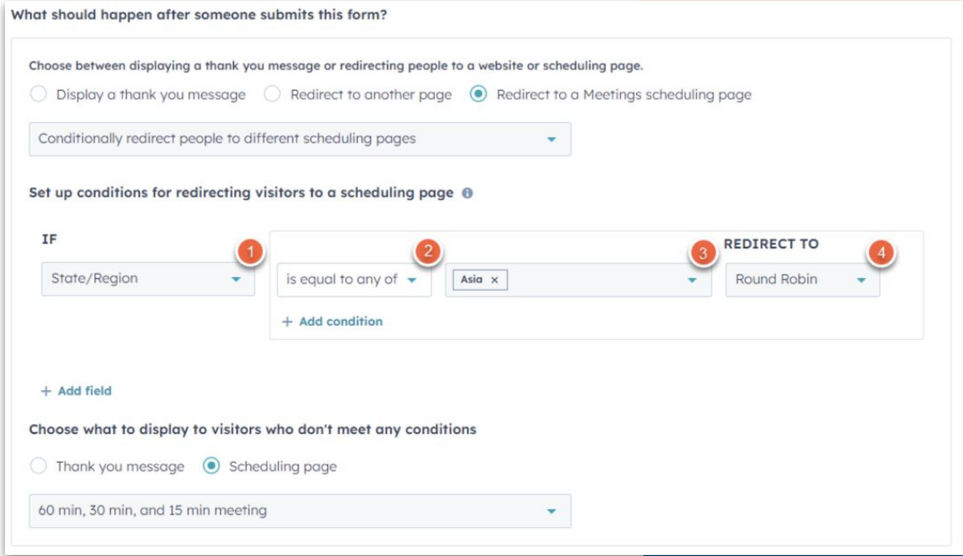
Free Starter Pro Ent Public Beta

Launch region: Global

Sales Hub™ + Service Hub™

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

Lead form routing unlocks the potential of conditional redirects, elevating your meeting booking process by providing the most fitting and tailored options for your visitors. Embrace this powerful feature and enhance your appointment scheduling today!

[Learn More]

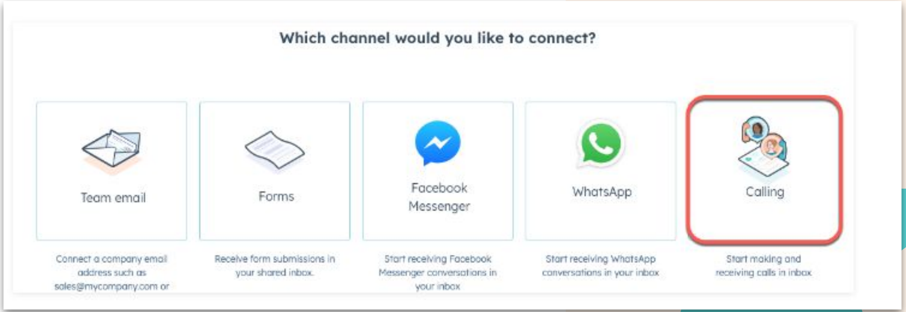
Free Starter Pro **Ent** **Live**

Launch region: Global

Sales Hub™ + Service Hub™

Calling as a channel in Inbox

Calling is now a channel in the Inbox. You can now connect a HubSpot-provided phone number to your Inbox, and route inbound calls to a group of reps. Once connected, Inbound calls will ring up to 10 available users at a time, and create a new thread in the connected inbox.



Use Case

- **Increased efficiency:** Inbound calls will ring up to 10 reps at a time. You can share context in threads, configure working hours, custom voice mail messages, and easily switch channels, resolving conversations faster.
- **Improved Caller experience:** By providing a single number to call, this feature will streamline the caller experience and make it easier for them to get the help they need.

Free Starter **Pro** **Ent** **Public Beta**

Launch region: Global

Sales Hub™ + Service Hub™

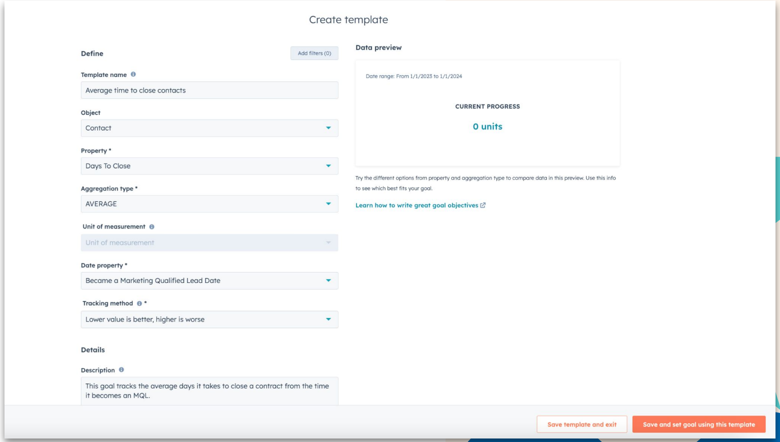
Create your own Goal templates

With this new release, the effort of defining custom goals is no longer lost! Now you can save the definition as a Goal Template. These templates are going to be available in the Goals template library within the section 'My templates'.

This significantly diminishes the administrative overhead of having to re-define custom goals every month, quarter, or year. You can easily revisit the Goal definition at a later time to ensure that the Goal is still relevant and defined correctly. Additional capabilities like 'Copy template' and 'Delete template' helps keep templates organized and relevant to your business.

Use Case

The Goals app now helps customers shift focus to defining the right goals for their business, and continue to use them easily in subsequent months, quarters, and years.



Free Starter Pro **Ent** **Live**

Launch region: Global

Operations Hub™

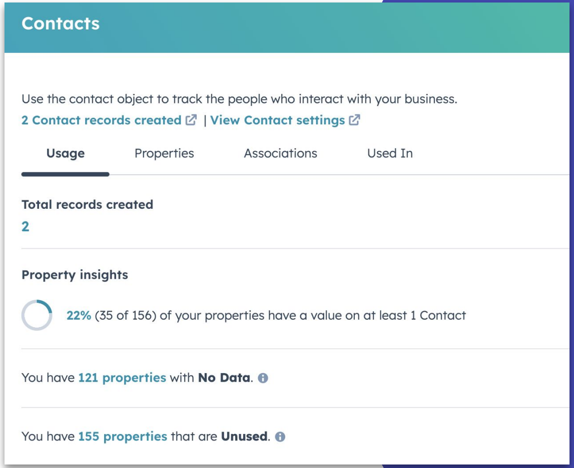
Operations Hub™

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

The new HubSpot Video feature allows you to upload a .vtt file to accompany video content, and it allows you to choose from several different languages in order to make sure your viewers are being served in the language they prefer.



[Learn More]

Free Starter Pro Ent Live

Launch region: Global

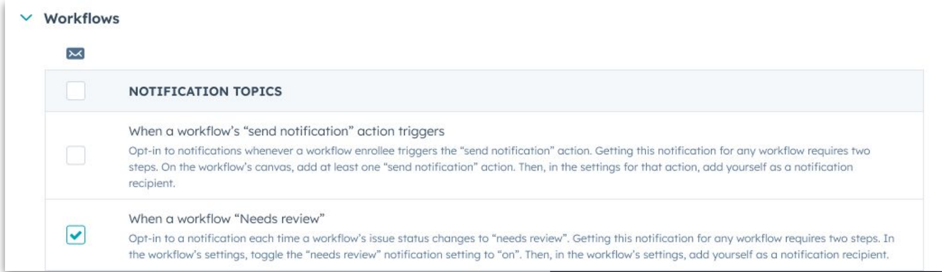
Operations Hub™

Notifications for Workflow Issues

Users can now be notified of workflow issues via Slack, Email, Facebook Workplace, MS Teams, Mobile, Browser, or with In-app notifications on a per workflow basis. As a result, less business-critical workflows can continue to be managed through the workflows Needs Review tab, but users can receive notifications for higher priority workflow issues every time they occur, or after a set period of time defined by the user.

Use Case

With workflow issue notifications, customers now have the tools to quickly respond to workflow issues, and minimize the unexpected impact, as soon as they occur.



Free Starter Pro **Ent** **Live**

Launch region: Global

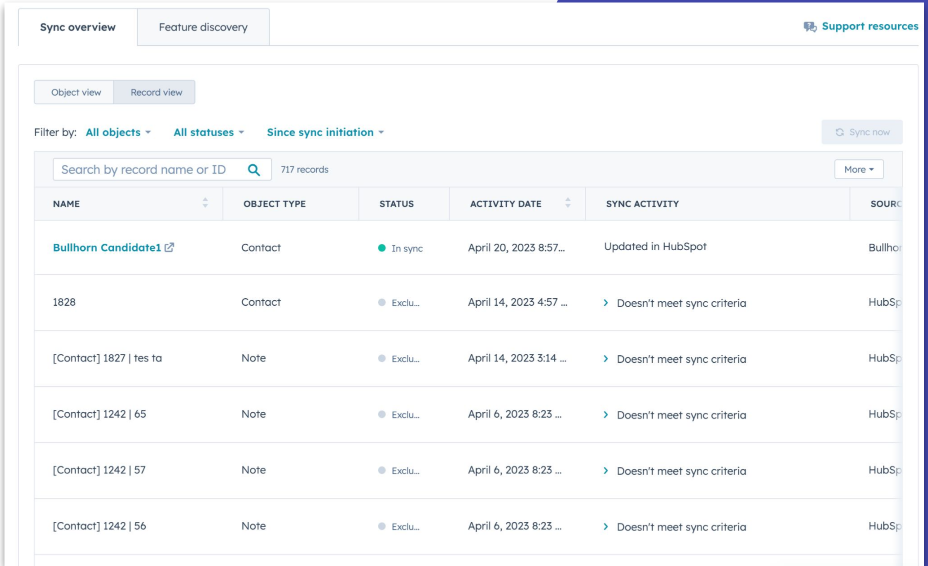
Operations Hub™

Data Sync Inspect by Record View

Inspect by Record View is the fully revamped place to go for all your Data Sync insights. After setting up a Data Sync integration for HubSpot, you can now supercharge your own analysis of what's happening with your data.

Use Case

With Inspect by Record View you can now search across objects and records, find sync errors faster, and customize the columns in your Sync Insights view. In short, you'll have a more complete and actionable overview of what's going on with your Sync.



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Launch region: Global

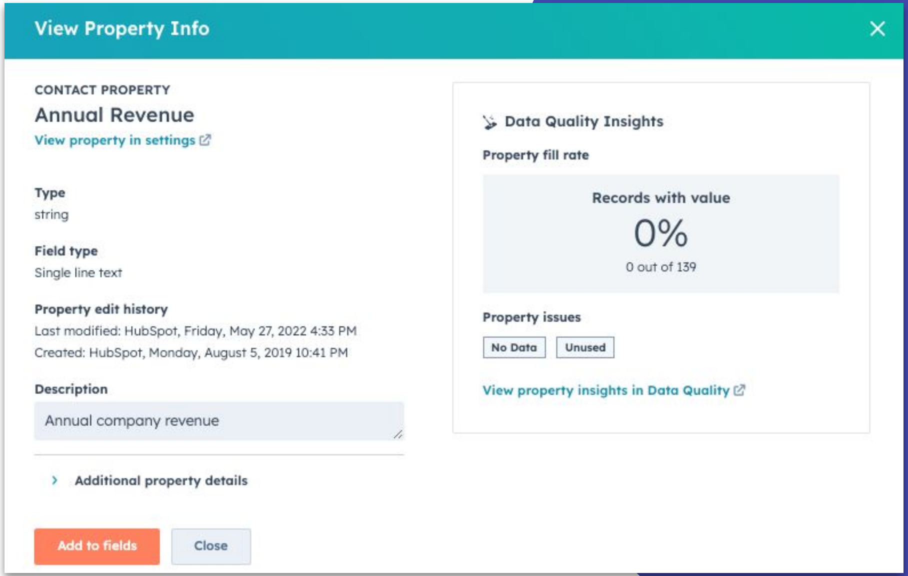
Operations Hub™

Data Quality Property Insights in Custom Report Builder

This update introduces data quality property insights into the custom report builder property info modal. It is available for contact, company, deal, and ticket objects.

Use Case

Data quality tools offer useful context to help understand properties, where data is coming from as well as how much data is available.



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Launch region: Global

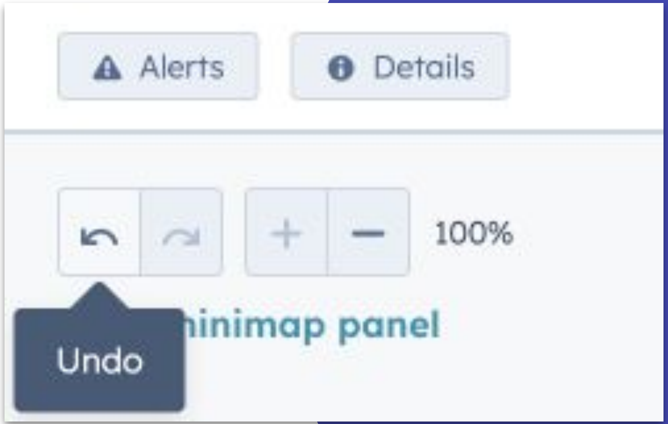
CRM Platform

Undo or Redo Changes on the Workflows Canvas

An undo/redo button on the workflows canvas will undo and redo most action changes on the workflows canvas during a single session. Undo/redo won't work for workflows that have extension actions or custom code actions, and won't work for moving or cloning of actions.

Use Case

With this new addition, customers can now quickly undo and redo changes inside the workflow canvas, and get right back to work as if nothing happened.



Free Starter **Pro** **Ent** **Live**

Launch region: Global

Set a contact's SMS or WhatsApp subscription status using workflows

You can now set or update your contacts' SMS or WhatsApp subscription type using a contact-based workflow.

Use Case

Set enrollment criteria to automatically enroll contacts and automate setting their WhatsApp or SMS subscription status.

**only available to Marketing Hub and Service Hub Pro+ customers*

Free Starter **Pro** **Ent** **Live**

Launch region: Global

Gauge Visualizations in Custom Report Builder

The custom report builder now supports gauge visualizations. Gauges make it easy to understand how your data is performing compared to defined ranges!

Use Case

Gauges make it easy to understand if your metric is above or below where you want it to be.

In a glance you can answer questions like "How close are we to meeting our quarterly sales target?", "How close are we to achieving our monthly lead generation target?", "How are we performing in terms of our target for customer satisfaction scores?", and many many more!

[Learn More]

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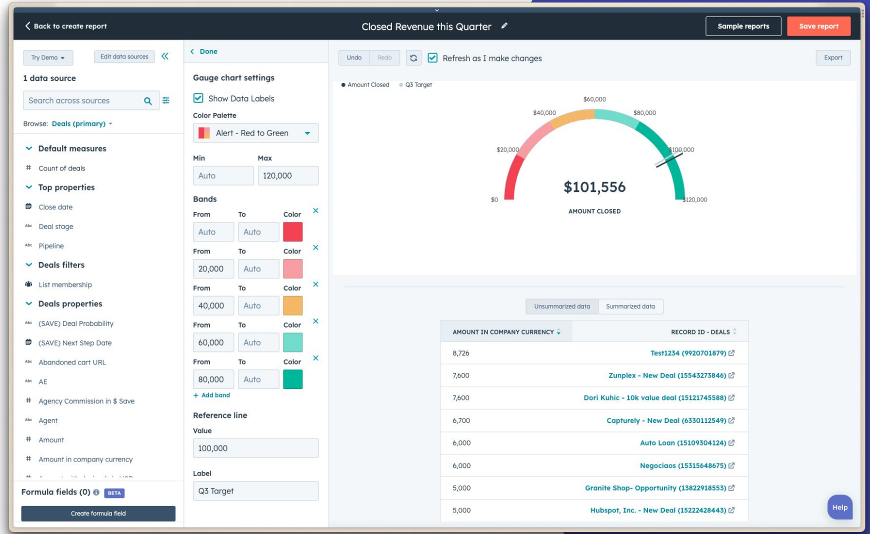
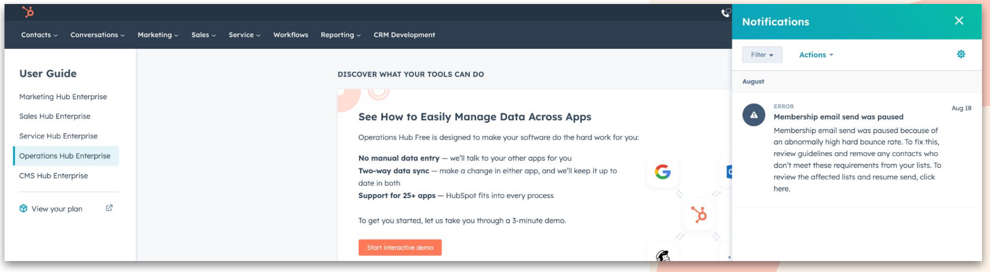
Launch region: Global



Membership Email Cancellations

We will now be canceling membership registration emails for underperformance. Additionally, we are adding visibility of cancellations in the private content settings and notifications in the HubSpot app to indicate when registration emails are canceled.



Use Case

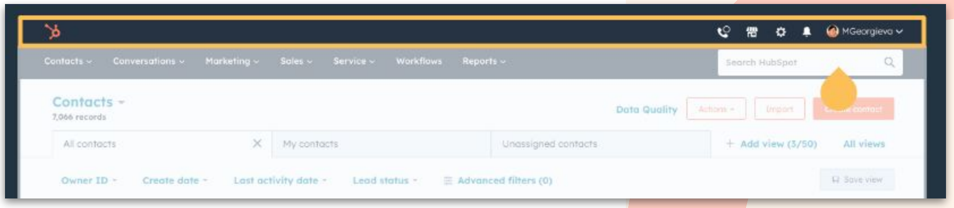
Our system will now flag poorly performing lists and cancel membership registration emails to those lists, to ensure best-in-class deliverability. Lists with poor deliverability may also be quarantined.

Free Starter Pro Ent Live

Launch region: Global

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

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.

Free Starter Pro Ent Live

Launch region: Global

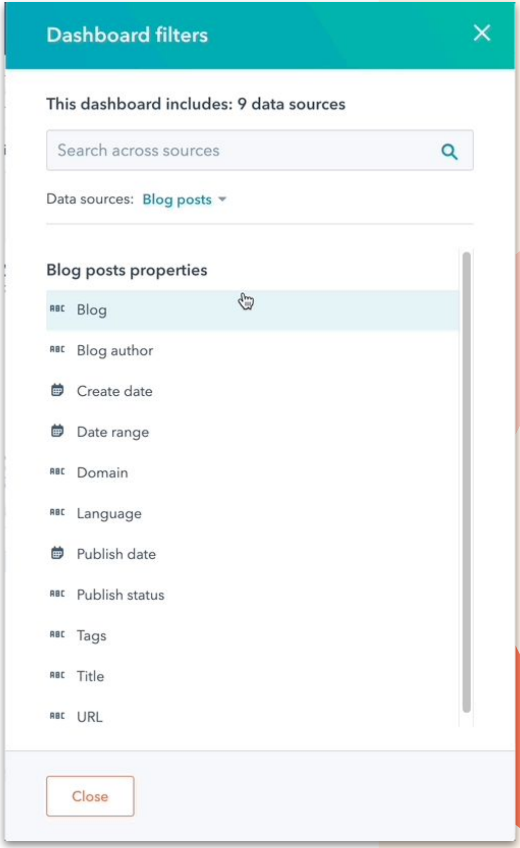
CRM Platform

Dashboard Filters

The new and improved dashboard filters experience. Customers will be able to apply dashboard filters using a wider variety of properties to single object and cross object reports.

Use Case

Dashboard filters can be applied to any report on a dashboard and users have the ability to filter by more properties.



[Learn More]

Free Starter Pro Ent Public Beta

Launch region: Global

CRM Platform

API Exposes User Activity from Centralized Audit Log

A new feature is available for those with an Enterprise tier hub subscription and Super Admin role: a centralized audit log of user account activity accessible through the Account Activity API.

Use Case

Exposing this same information contained in the centralized audit log via an API allows customers greater flexibility to use this information in third-party systems and processes such as security organizations who may wish to pull this information into their SEIM.

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Launch region: Global

CRM Platform

New Data Privacy Dashboard

Now, a new privacy-centric dashboard will display six reports about contact engagement and behavior, contact region, legal basis for processing contact data, and more. This data is a starting point to track and better manage contacts in your accounts, and to drive processes that address privacy risks.

Use Case

This data helps you make better decisions to reduce risk, follow data privacy laws and best practices, and manage contacts' communications preferences.

Free Starter Pro Ent Live

Launch region: Global

HubSpot

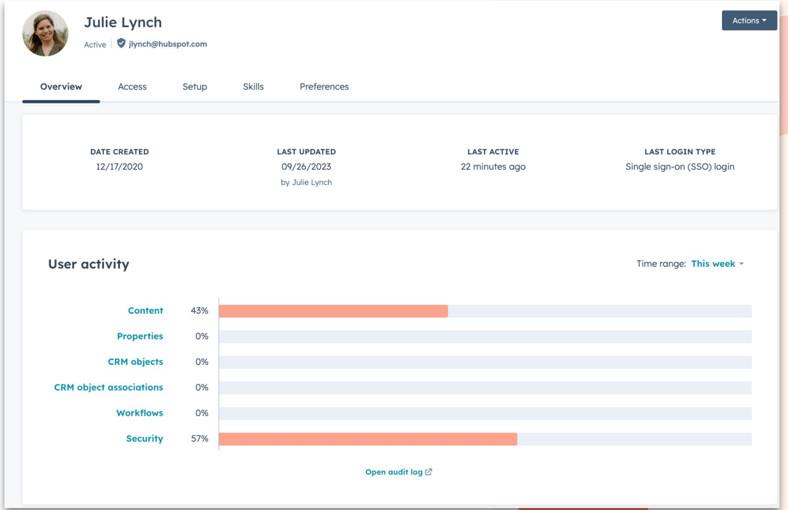
CRM Platform

Overview of Users and New User Properties on User Record

With this update, admins can now view more granular portal usage (enterprise tiers only), connected account, security, and association data on a user-by-user basis by viewing the new "Overview" tab of the user record to help make sure that users are making use of HubSpot tooling in the best way for their business.

Use Case

From the "Overview" tab, admins can get a quick understanding of key user stats related to activity and login, including a visual from the audit log showcasing apps recently used by the viewed user (enterprise tiers only)



Free Starter Pro Ent Live

Launch region: Global

HubSpot

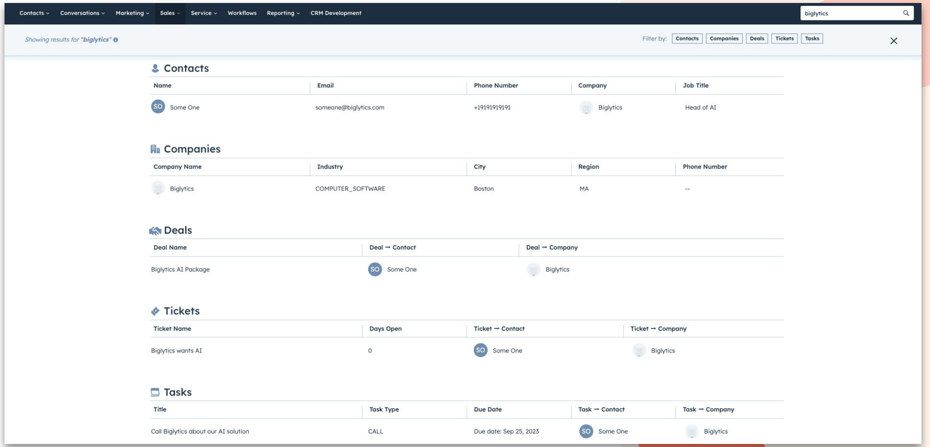
CRM Platform

More details and labels on each Global Search result

Now, you can see additional details about a contact, company, deal, ticket, or task, when looking for them in Global Search. Also, every detail in the result is now labeled to help you understand what it is.

Use Case

This will help you quickly identify the result that you were looking for even if they have similar names or properties.



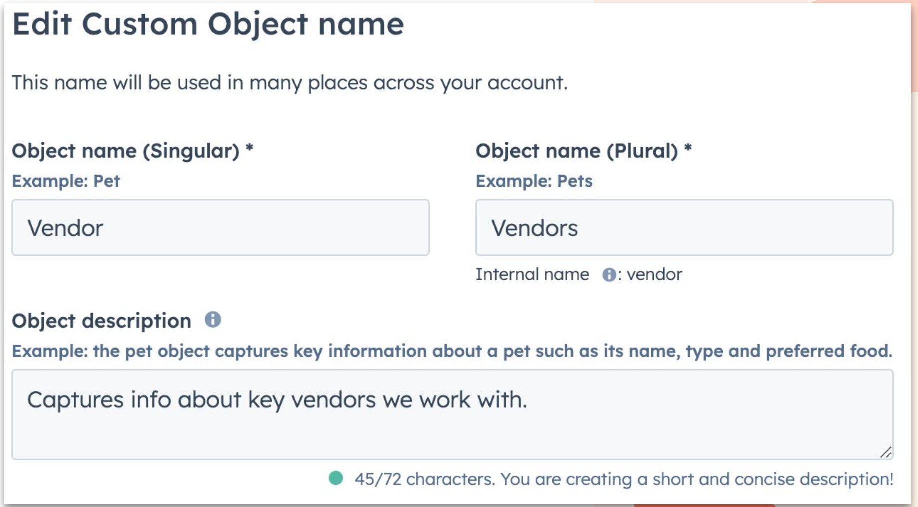
Free Starter Pro Ent Live

Launch region: Global

Create Custom Object Descriptions

Admins will be able to provide a short description of a custom object type to provide additional clarity to everyone who interacts with it. To start, the description will be visible in custom object settings, the data model overview and import.

Note: this release also includes the ability to select an existing property and set it as the secondary display property while editing.



Free Starter Pro **Ent** **Live**

Launch region: Global

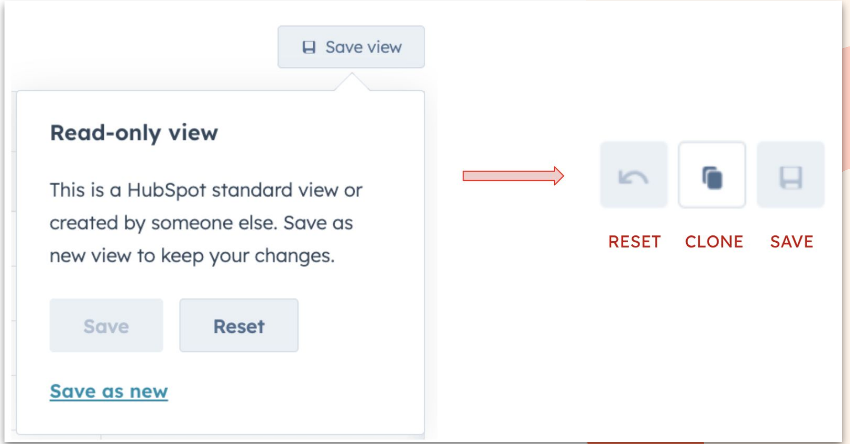
CRM Platform

Improved 'Save' Experience for Index Page Views

The current save options are nested behind the 'Save view' button, so that you must click the button to see that you can 'save', 'reset, or 'save a view as 'new'' (clone).

This release exposes the three save options directly above the table, and uses color to let you know when there are unsaved changes.

Use Case
Making it more obvious that there are unsaved changes for views, as well as removing one extra click to save a view.



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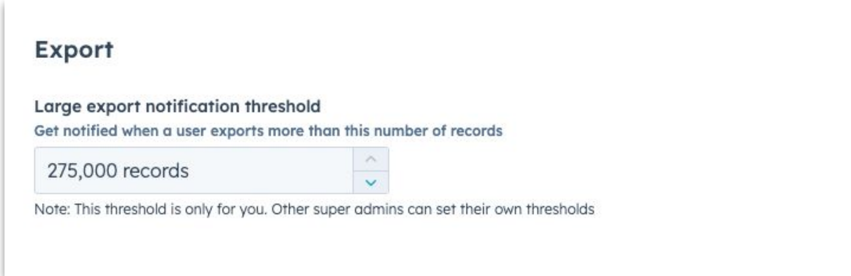
Launch region: Global

A more precise large export warning notification

We've updated our large export warning notification to give super admins more control over how they're notified of large exports from their portal. Super admins can now specify that they want to be notified every time an export occurs over a specific threshold of records that they set. Previously, super admins could only opt in to receive a notification if more than 50% of the records in their portal were exported.

Use Case

This update gives super admins the option to set up a large export warning notification that works best for them, ensuring they feel like they're in control of how data is taken out of their CRM.



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Launch region: Global

CRM Platform

Calls, Notes & Logged Activities Now Associated with the Correct Records on Mobile

Create a note, log an activity, or start a call on a contact, company, deal or ticket on the mobile app. Records that are associated to the record you started from will be pre-selected for you. You can remove associations or add new ones before you save.

Use Case

When a user starts logging an activity with a contact for example, their primary company and recent open deals will be "pre-selected" as associations. The user can add or remove any other associations they like.

Learn More

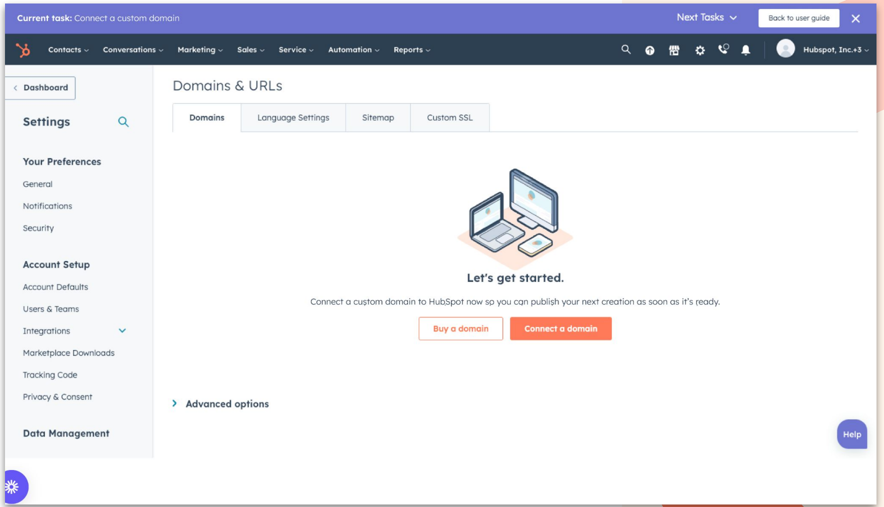
Free Starter Pro Ent Live

Launch region: Global

CRM Platform

Simplified Apex Redirect Setup

When connecting a custom domain, both the www and non-www versions of customers' sites will be set to redirect by default. Users can opt-in to this behavior or choose to "opt-out" if they don't want automatic redirects. Our aim is to simplify the domain connection process, eliminating potential confusion for website owners.



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Launch region: Global

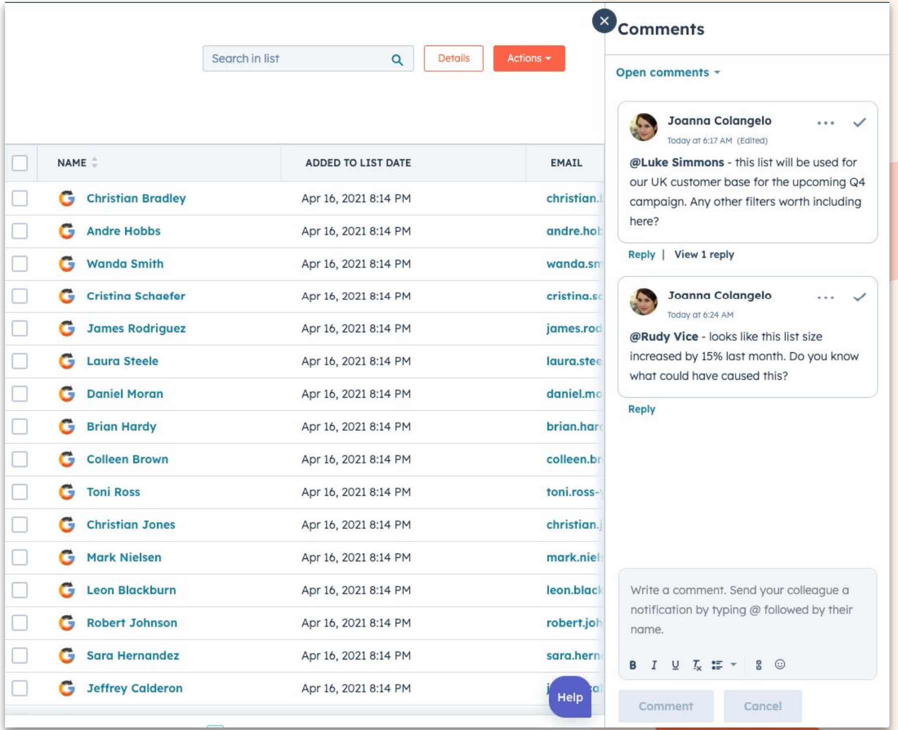
CRM Platform

Commenting in Lists

Customers can now comment inside individual Lists within HubSpot.

Use Case

Adding the collaboration sidebar into Lists allows these conversations to happen seamlessly within HubSpot while holding all relevant context easily accessible when needed.



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Launch region: Global

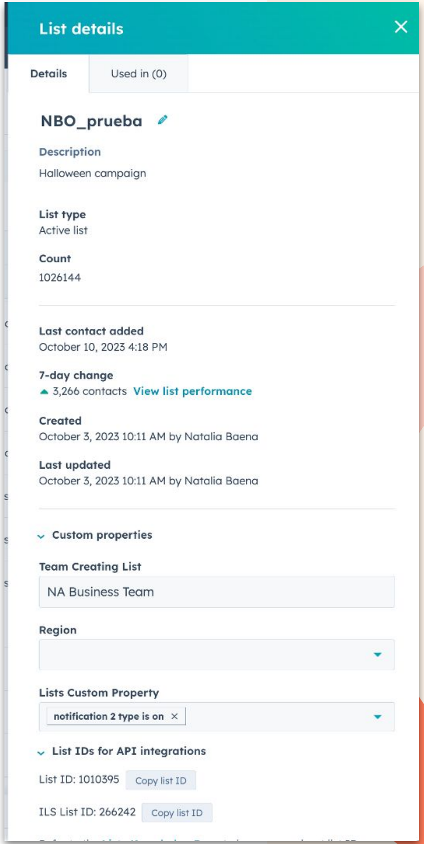
CRM Platform

Custom Properties and a Description field for Lists

Custom properties can now be created to better manage and organize Lists! Additionally, we've now added an optional Description field inside every list.

Use Case

Now, admins will be able to define a set of custom properties to help teams better organize lists during and after list creation.



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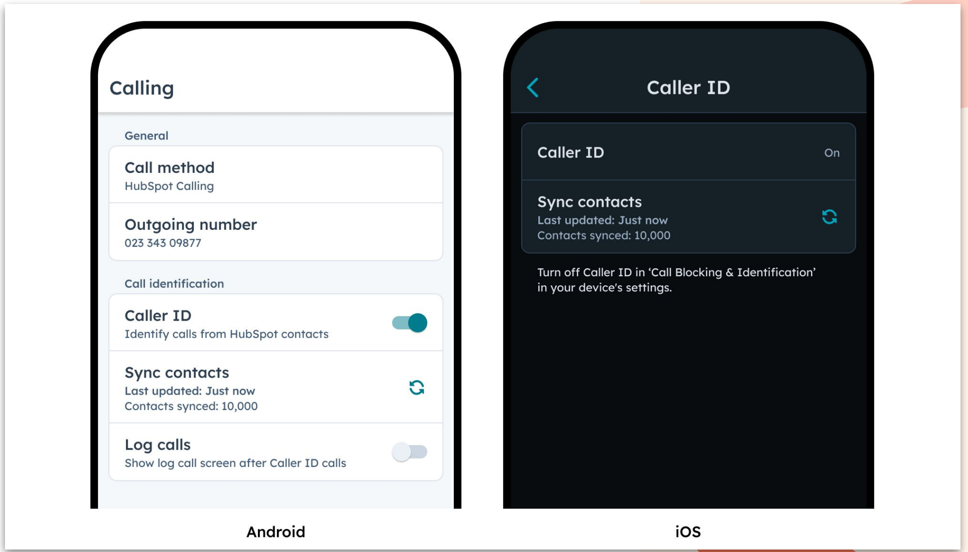
Launch region: Global

Mobile Caller ID Enhancements

Mobile HubSpot customers can now enjoy an enhanced Caller ID experience for both Android and iOS platforms. We have revamped the CallerId solution and added a set of improvements and optimisations to ensure customers have the best experience when matching incoming call numbers to existing CRM contacts.

Use Case

- Improved ability to match many more contacts - optimized the contact and cache storage strategy only making use of required contact data
- Improved the contact syncing experience



Learn More

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Launch region: Global

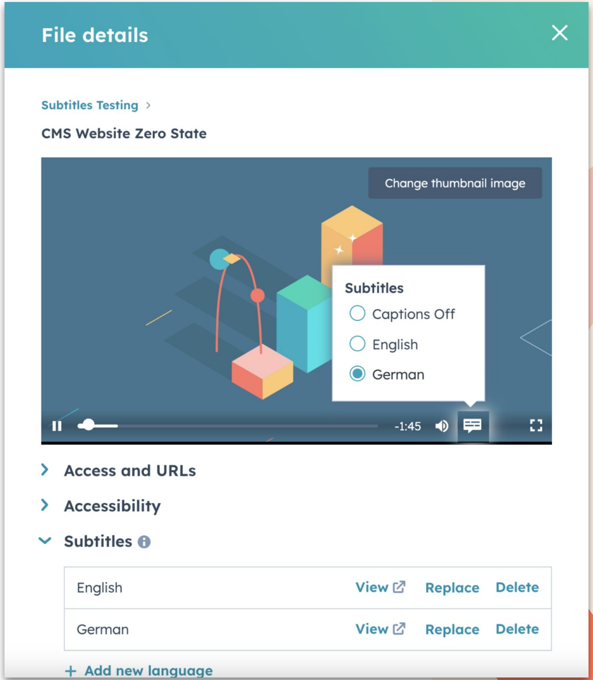
CRM Platform

Multi-language Subtitles for HubSpot Video

Customers will be able to select multiple subtitles files in specific languages to be uploaded. When a user watching the video selects the subtitles CTA in the player, they will see a list of the available subtitle language options.

Use Case

We will allow HubSpot Video users to upload multiple subtitle files in various languages, instead of supporting just a single file as we currently do.



Free Starter Pro Ent Live

Launch region: Global

CRM Platform

Comment Notification Bundling

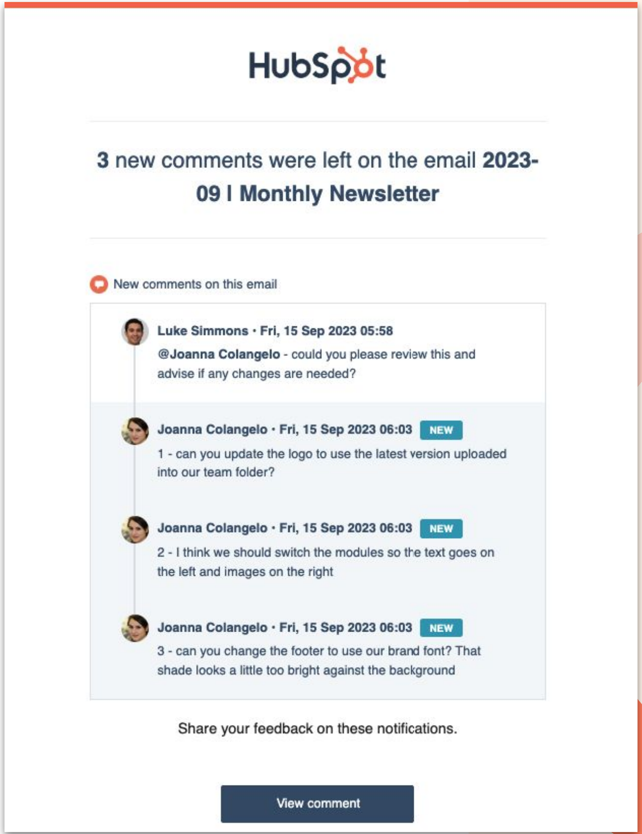
As part of this update, we will now bundle comments left in quick succession on the same thread.

Use Case

Users will receive less notifications and crucially when we do notify, we can provide more clarity and context helping our customers to get the full context on the ongoing work.

Free Starter **Pro** **Ent** **Live**

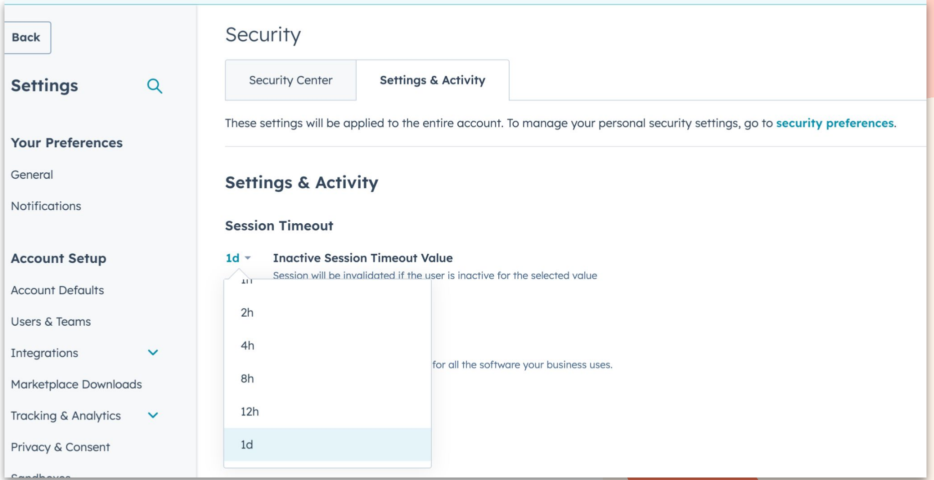
Launch region: Global



CRM Platform

Customizable Options for Session Timeout due to User Inactivity

HubSpot's session timeout for web browser sessions forces a user to log in again to the HubSpot account if a user is inactive for a certain amount of time. The default inactivity timeout value is 24 hours but with this update administrators will have the option to configure the inactivity timeout value for all the users in the entire account.



Use Case

This rollout will improve your security posture and will help to prevent any unauthorized access.

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Launch region: Global

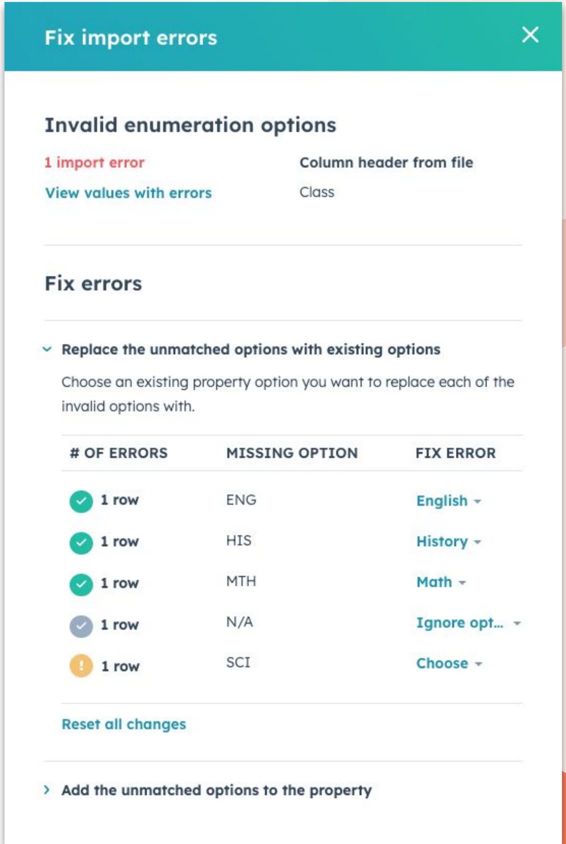
CRM Platform

Remap Incorrect Values on Dropdown Select Properties

Users can now remap an invalid enumeration option on a dropdown select property to a valid property option, without quitting the import flow.

Use Case

With invalid enumeration option remapping for dropdown select properties, users can reduce the number of errors present in their imports, while moving quickly through the import flow.



[Learn More]

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Launch region: Global

CRM Platform

Property Source Information now available in Property History Exports

Historically, exporting a property's history has shown you the different values that records in the CRM have had for that property, and the date at which that value changed. Now, we've added additional information to this export to also tell you which user and tool triggered a property change within the CRM.

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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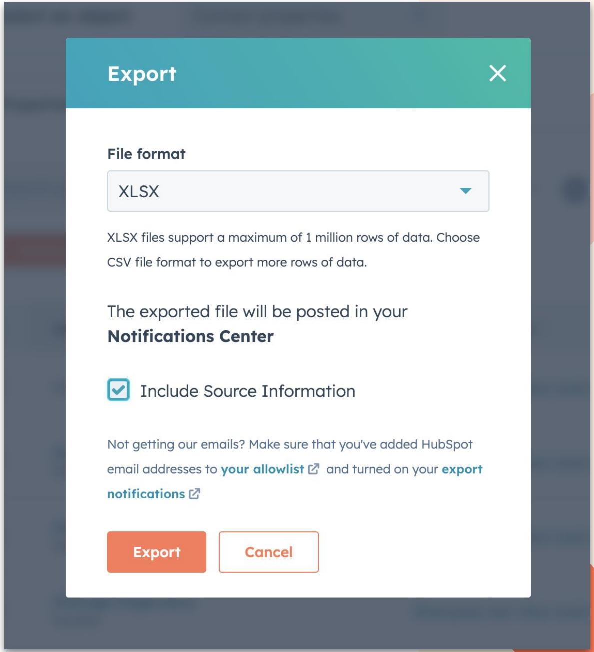


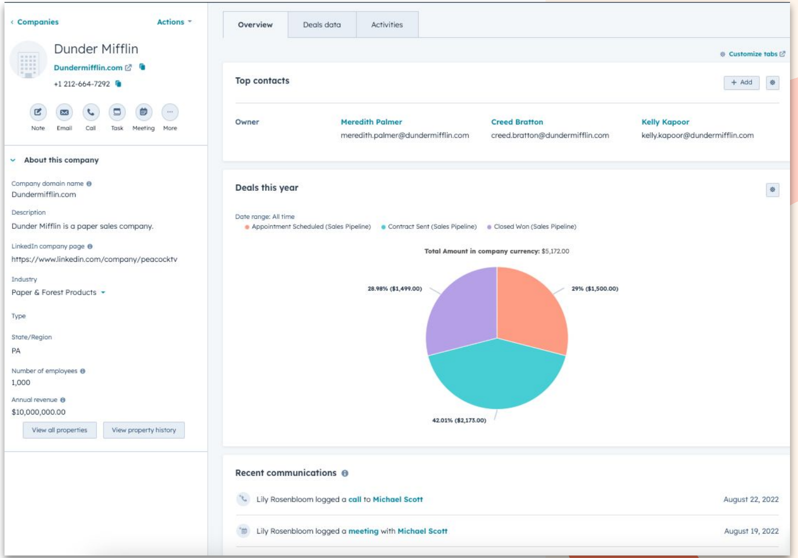
CRM Platform

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

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]

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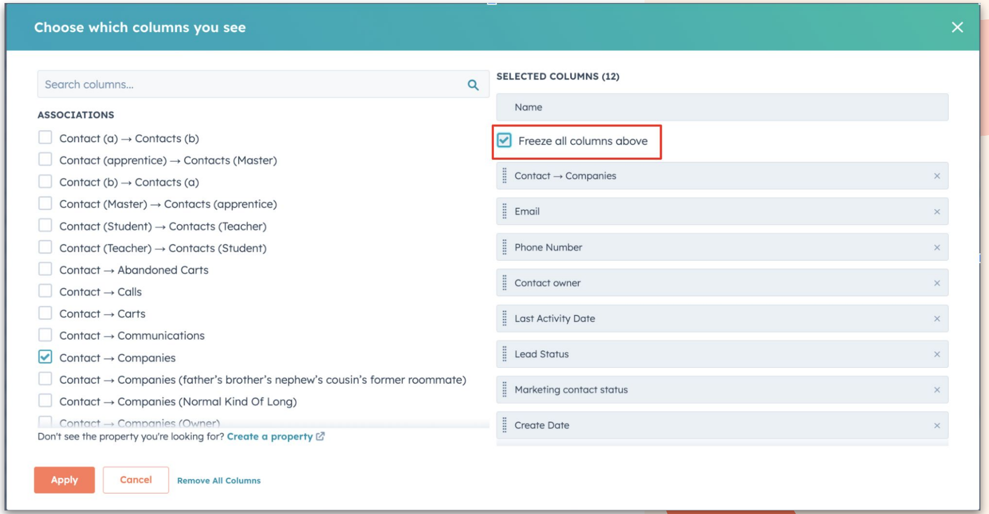
Launch region: Global

CRM Platform

"Freezing" the First Column on Index Page

The updated frozen column setting allows you to quickly freeze the first column on a view so that you can view your table data without losing sight of which record you're working on



Use Case

Freezing the first column gives users a setting to make the 'Name' column sticky on a table so that its visible as you scroll to the right - regardless how many columns you may need!

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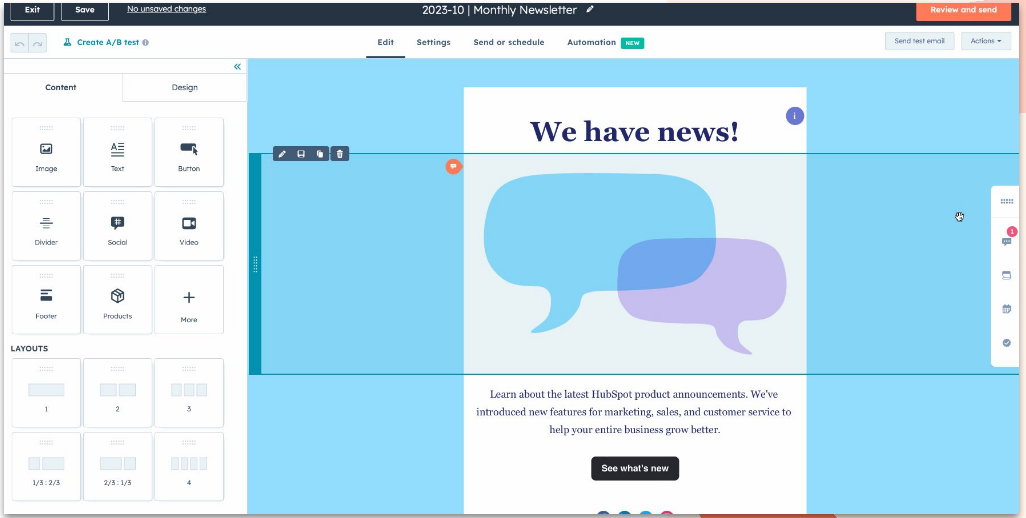
Launch region: Global

CRM Platform

Unread Comment Improvements

We are releasing a number of updates to the collaboration sidebar to make it easier to find new and unread comments. The updates include:

- Unread comment counter
- Preview of unread comments
- Link directly to new comments from email notifications



Use Case

With these updates, we can steer the user directly to the latest comments they need to action and address, allowing them to catch up faster and get the latest context.

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Launch region: Global

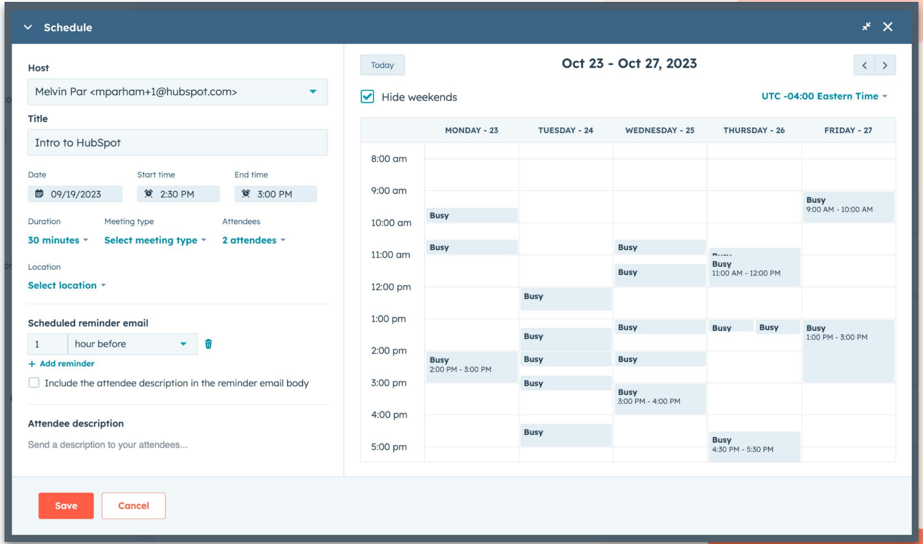
CRM Platform

Reminder Defaults & Reminders for CRM bookings and Proposed Times bookings

You can now configure default reminder intervals, send reminders for meetings booked through the CRM, and send reminders for meetings booked through the proposed times feature in Meetings! Previously, reminder emails could only be configured automatically through scheduling pages.

Use Case

Users will have the ability to configure reminder emails to send prior to meeting time through all scheduling flows (meetings booked via scheduling pages, meetings booked via CRM records, and meetings booked via the insert proposed times functionality).



Free | Starter | Pro | Ent | Live

Launch region: Global

CRM Platform

Timezone Switcher for Date and Datetime Properties

This update exposes more information around the timezone that a date or datetime property is being evaluated in. The backend system that powers lists stores properties for date and datetime in different timezone formats. By default dates and datetimes are stored and evaluated based on the following timezones:

- Dates: UTC
- DateTime: Portal Time Zone

Use Case

This change both exposes the underlying evaluation logic, while also giving users power to modify the evaluation on a filter by filter basis.

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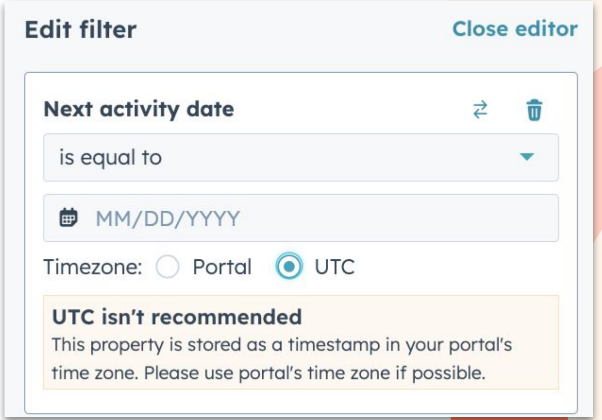
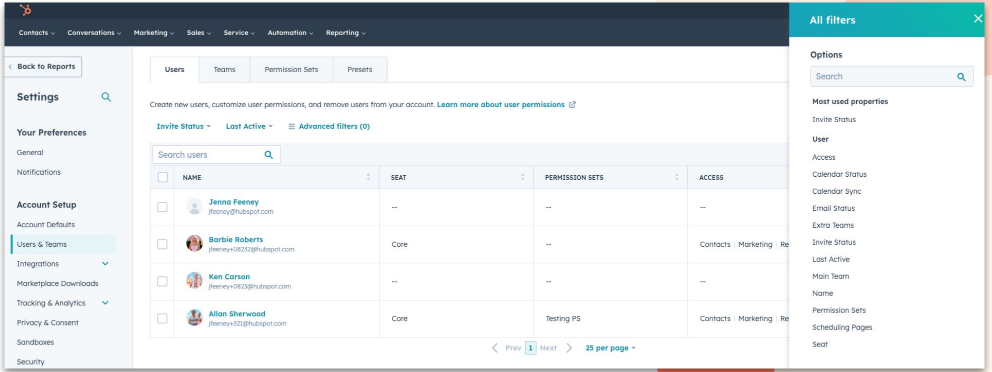


CRM Platform

Updated User Table with Additional Data and Filtering

Introducing a new version of the user table showing additional information about the users in a given portal. Viewers are now able to easily scroll through the newly surfaced properties on users to get a more holistic view of where a user is in their setup, how they are configured, and when they were last active.



Use Case

Updating the table to utilize the framework will help bring consistency to user settings. This will also make it easier for other teams to build off and continue to scale the user table to add value to our customers.

Free | Starter | Pro | Ent | Live

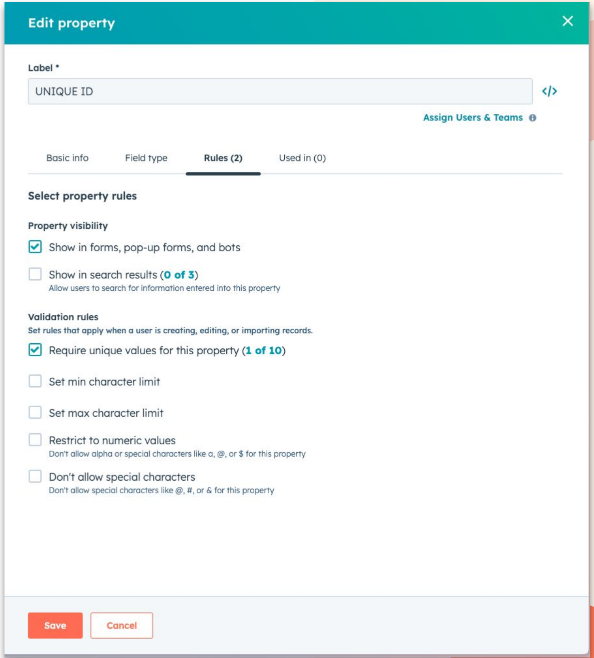
Launch region: Global

Custom Unique IDs for Contacts in Import

We now support custom unique IDs for contacts within import. This means that you can now upsert and dedupe your data across contacts, companies, deals, tickets, and custom objects -- leveraging a unique ID of your choosing.

Use Case

Be able to easily migrate from a different CRM to HubSpot by enabling custom unique IDs across various imported objects.



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Launch region: Global

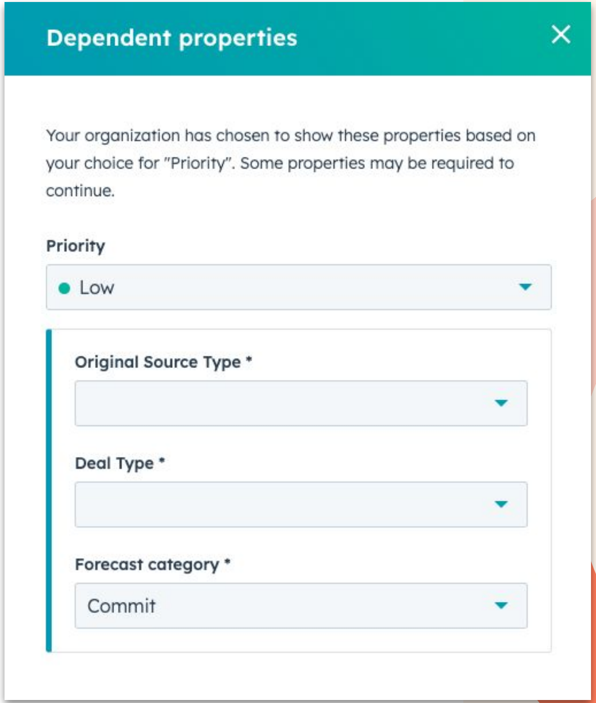
CRM Platform

Conditional Property Logic

Admins will be able to set conditional logic for enumeration properties regardless of whether they have been added to the ‘create record’ form. This logic will be triggered when reps make edits to properties across the CRM.

Use Case

Conditional property logic is a powerful tool to help you safeguard data quality and create a streamlined experience for reps interacting with records. This data management tool will help CRM admins lay the foundations for clean data and a smooth rep experience by guaranteeing that required information isn’t missing.



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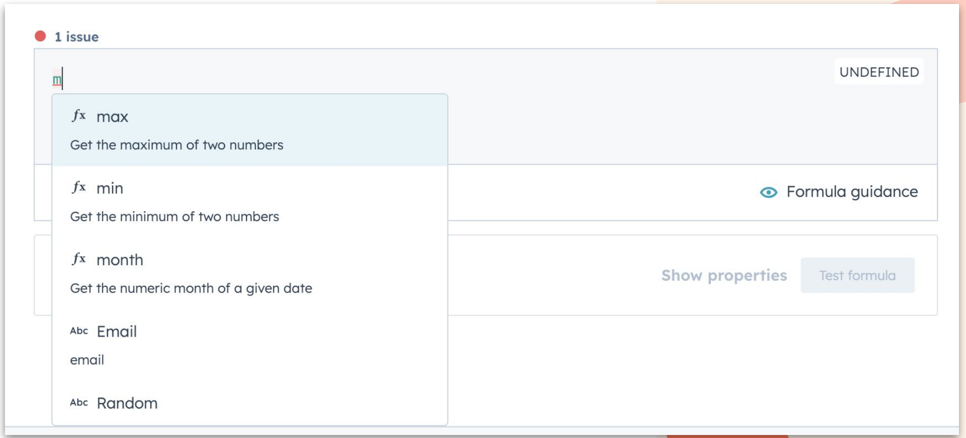
Auto-complete for the Advanced Formula Editor

With the release of auto-complete, we can now predict and automatically complete or suggest options for the property or function as it is being entered. Auto-Complete will streamline the process, reduce errors, and enhance your experience with the advanced formula editor.



Use Case

Auto-complete will speed up formula writing and reduce syntax errors by suggesting properties and functions as the user is typing.

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CRM Platform

Easily move users from super admin to lower levels of permissions in Security Center

The Security Center currently recommends that users limit the number of Super Admins on their accounts, and suggests removing Super Admins if you have too many. This new wizard lets you easily select a permission set or permission template from your list of portal permission sets to change a Super Admin's permissions quickly, and even do so in bulk.

Use Case

Ensure the users in your account have the right permissions to do their job.

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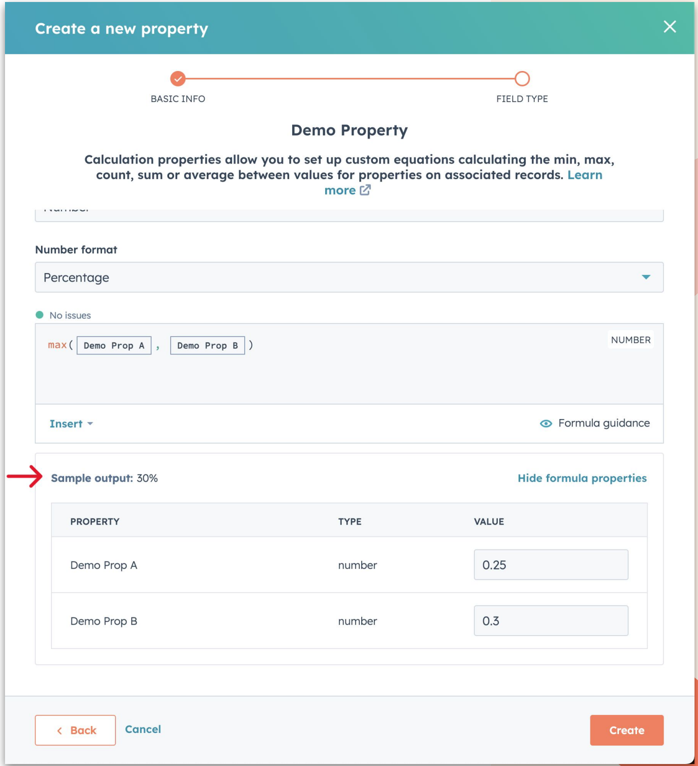
CRM Platform

Formula Preview for the Advanced Formula Editor

You can now preview the output of a formula before saving it.

Use Case

With the formula preview, say goodbye to repetitive edits and formula adjustments. There will be no more guessing or trial and error - you get instant feedback, ensuring your formulas are accurate from the start saving you both time and frustration.



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Launch region: Global

App Marketplace & Integrations

App Marketplace & Integrations

New and Improved Apps in the App Marketplace

Using the HubSpot App Marketplace, you can integrate your existing tools or discover new apps to help your business grow – including the newly certified Webflow app, which makes it simpler for marketers to connect their Webflow creations directly to HubSpot and configure mission critical automations.

Since July, 71+ new apps joined the App Marketplace and 17+ apps were enhanced with new features. Read on to learn more about these detailed improvements.

Use Case

HubSpot's App Marketplace has 1,500+ apps, with new additions and updates made regularly. These recently enhanced apps help customers connect their tools to the systems they know and use every day.

Learn More

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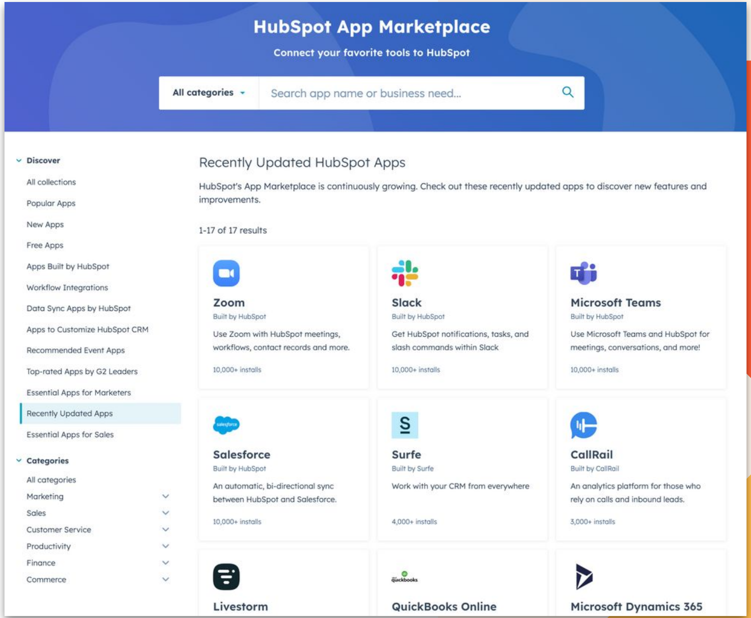
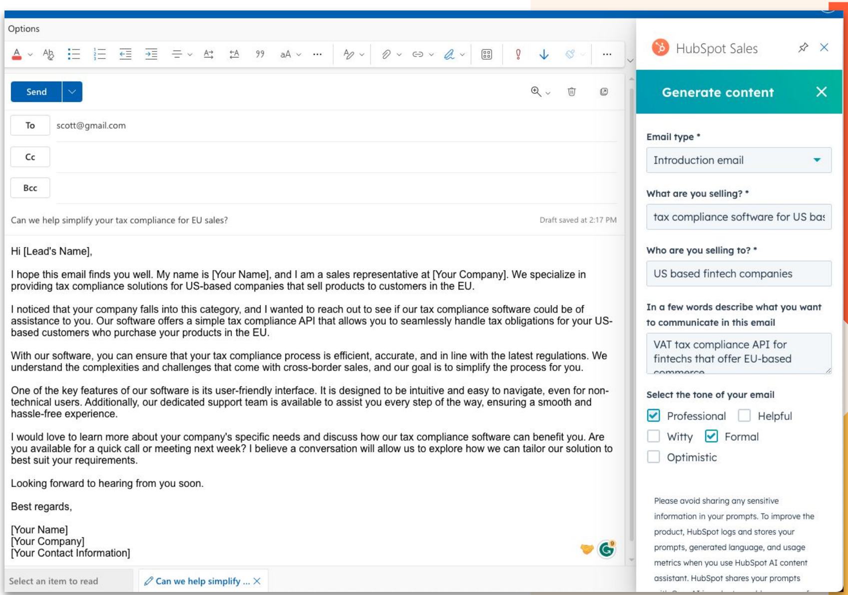


App Marketplace & Integrations

AI Assistant for Generating Sales Emails in the HubSpot Office 365 Add-in

We are excited to announce the release of AI Assistant for the HubSpot Sales Office 365 add-in. Content creators can now generate sales introduction emails, cold outreach emails, and follow-up emails in seconds.



Use Case

The tool jumpstarts the writing process, generating sales emails in a flash and helping reps scale their efforts while still writing high quality emails that generate leads.

Free | Starter | Pro | Ent | Public Beta

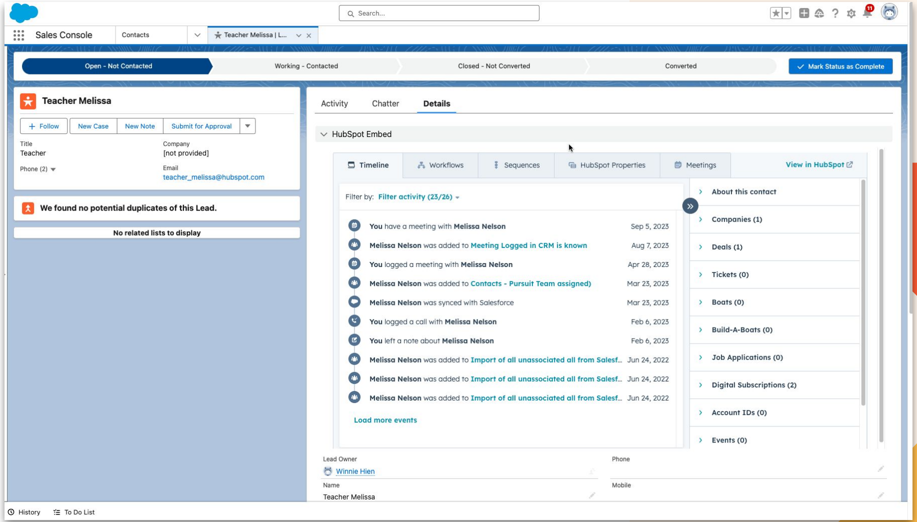
Launch region: Global

Enroll in a HubSpot Sequence from Salesforce

You can now enroll your contacts in a Sequence directly from Salesforce to automate your outreach.

Use Case

If you're a Salesforce and HubSpot customer, you can now enroll in a Sequence directly from Salesforce through the HubSpot Visualforce window without jumping back and forth between tools.



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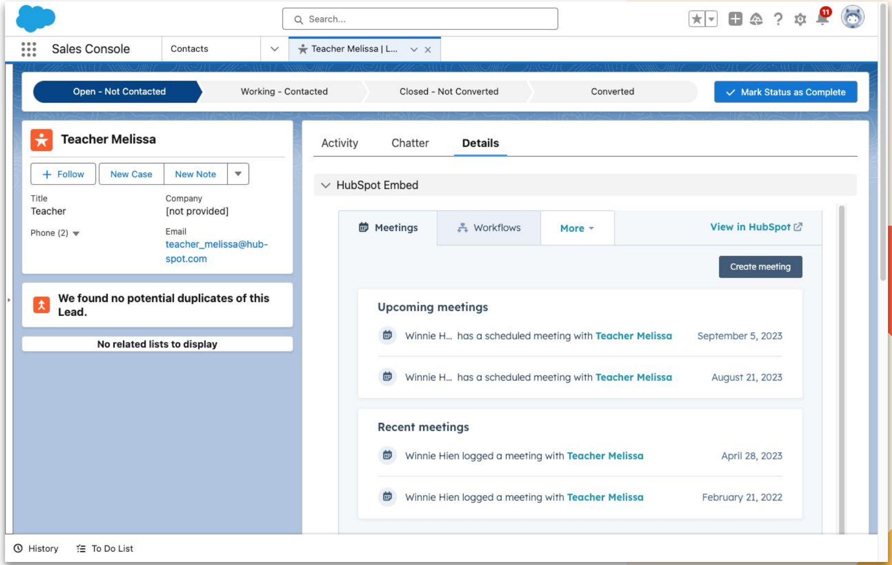
Launch region: Global

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

If you're using Salesforce as your CRM and HubSpot for prospecting, you can now book meetings from a contact or lead record in Salesforce using the Visualforce window. No need to jump back and forth between HubSpot and Salesforce.



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Launch region: Global

New Permission Requirements for Installing Public Apps from Third-Party Websites

The **App Marketplace Access** permission will be required in addition to any other permissions required to install the app, based on the access being requested by the app.

Use Case

Admins want full control over who is allowed to install apps in their HubSpot account whether from the HubSpot App Marketplace or from third-party websites. This change ensures that the permissions required to install an app are the same regardless of where the install was initiated.

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Launch region: Global

Integrations Sync Card for Data Sync: Zoho CRM, Pipedrive, Copper, Odoo & Shopify

The Integration Sync card is rolling out to 5 more Data Sync Integrations:

- Zoho CRM
- Pipedrive
- Copper
- Odoo
- Shopify (integration is in private beta)

Use Case

Seeing the sync status directly linked to a HubSpot record gives you a more accurate view of your data.

Learn More

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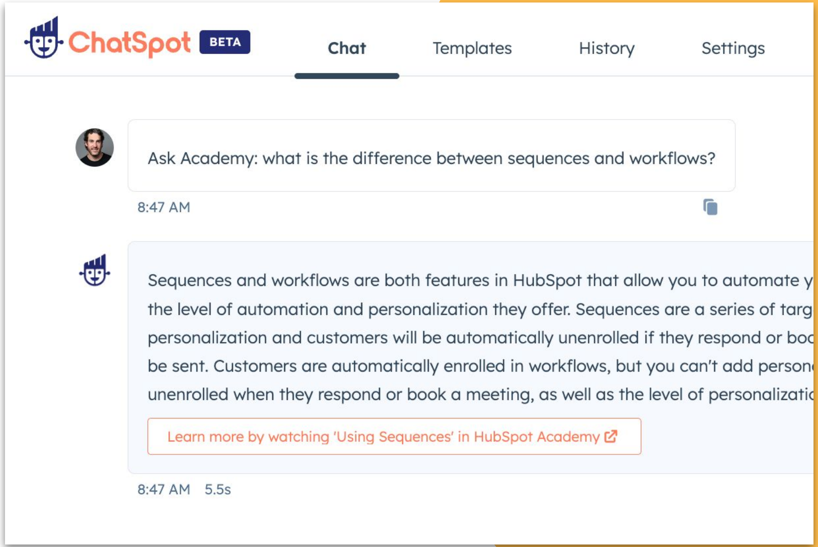
Launch region: Global

Ask HubSpot Academy in ChatSpot

HubSpot Academy is now a source for answers in ChatSpot. That means users of ChatSpot can now get their questions answered through 600 hours of HubSpot-approved educational content. Responses in ChatSpot link back the video that the response came from, should the user wish to learn more or get more context. Users can either mention 'Academy' in their prompt to guarantee an Academy response, or if ChatSpot decides that Academy is the best source of information, it will pull its response from Academy.



[Try it out in ChatSpot!]

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Launch region: Global

New Webflow App for HubSpot

The newly certified and updated Webflow app allows you to connect your Webflow site to HubSpot and harness the power of both platforms. Customers can now:

- Embed and style HubSpot forms in the Webflow Designer
- Connect and map Webflow forms to HubSpot forms in the Webflow Designer
- Add HubSpot assets to your Webflow site
- Embed HubSpot chatbots to your site
- Add the HubSpot tracking code to your site

Use Case
By embedding HubSpot forms and chatbots into your Webflow site, you can seamlessly collect contacts to your HubSpot CRM and send automated emails to those leads and customers.
Get Started

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Thank you