

# September 2024 Product Updates

RECAP



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# Marketing Hub<sup>®</sup>



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# AI assisted Lead Scoring (fit scores)


[Learn More](#)

With new AI assisted fit scoring you can now even more accurately identify your most promising leads by combining the power of AI with your unified data.

## Use Case

As a marketer, you need effective scoring to identify your most promising leads, whether they're ready for a sales call or need nurturing. With the new Lead Scoring app, powered by AI and unified data, you can easily create accurate fit scores that help you pinpoint the leads most likely to convert into customers.

### Contact-based




**Contact fit score**  
Evaluate how closely a contact aligns with your ideal customer based on demographics and other criteria.

### How it works

- 1. Build your score with AI**


Get unique scoring recommendations tailored specifically to your business. These recommendations are based on the analysis of your historical data.

**You're in control.** You can edit, delete and add to these recommendations before turning on your score.



- 2. Route to sales**

Keep a score for each contact to evaluate if they're a good fit for your organization. Send qualified leads to sales through workflows or lists, so that they can focus on the most promising opportunities.

You can use the score to build a more effective marketing strategy with higher conversion rates.


- 3. Iterate and improve**

Track and analyze the results of your lead scoring system to improve its effectiveness and get better quality leads.



Launch region: Global

Free

Starter

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Enterprise

Public Beta

# AI assisted Lead Scoring (engagement scores)

AI-assisted engagement scoring now empowers you to identify your most promising leads by merging your intuition with AI analysis. The model examines past interactions of successful leads, providing tailored recommendations for a more accurate lead engagement score.

## Use Case

This feature eliminates guesswork in your lead scoring process, replacing bias with data-driven insights on which interactions truly drive engagement. You retain control over the scoring criteria, ensuring a precise and personalized approach to nurturing your leads.

**Launch region:** Global

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**Let AI suggest a score tailored to your business.**

Let AI recommend a score for your business. Select the data range for AI to analyze and generate accurate, customized scoring recommendations. Once the score is created, you'll have full control to adjust it before activating. [Learn more](#)



**Score name**

New engagement score (August 30, 2024 8:45 AM)

**Which lifecycle stages and timeframe would you like to evaluate?**

**Start stages** ⓘ

Lead ×

**Successful end stages** ⓘ

Sales Qualified Lead ×

**Timeframe** ⓘ

30 days

# Lead Scoring - Score Thresholds

Lead Scoring now allows you to easily identify and prioritize your most promising leads by categorizing scores as high, medium, and low. This enhancement simplifies the scoring process, making it clear which leads warrant attention.

## Use Case

By setting specific threshold values for each category, you can ensure consistent communication across Marketing and Sales about what each score means. This clarity helps your team effectively focus on high-value leads, streamlining your scoring strategy and improving conversion rates.

**Launch region:** Global

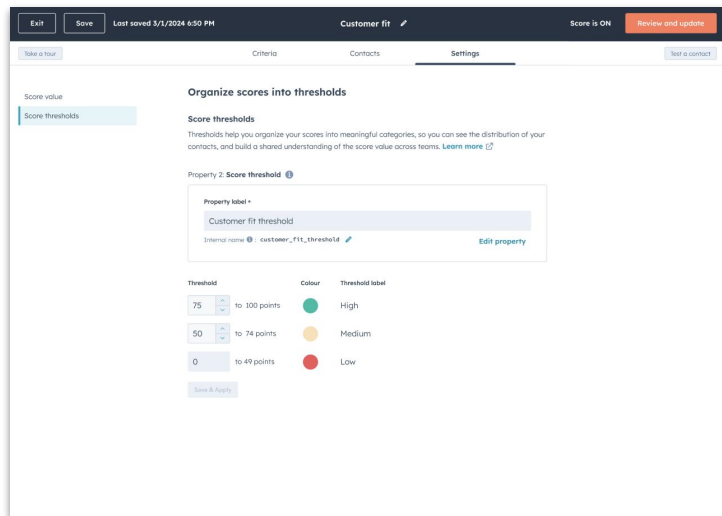
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# Lead Scoring - Contact lead score CRM card and score history

The new contact lead score CRM card and score history panel provide marketers and salespeople with an easy way to view a contact's lead score and its history directly on the contact record, including recent activities that influenced the score.

## Use Case

By accessing this detailed overview, you can effectively communicate valuable leads between Marketing and Sales, ensuring both teams understand the scoring strategy. For instance, if you see that a contact recently downloaded a case study that boosted their score, you can personalize your outreach by referencing that action, enhancing your engagement efforts.

Launch region: Global

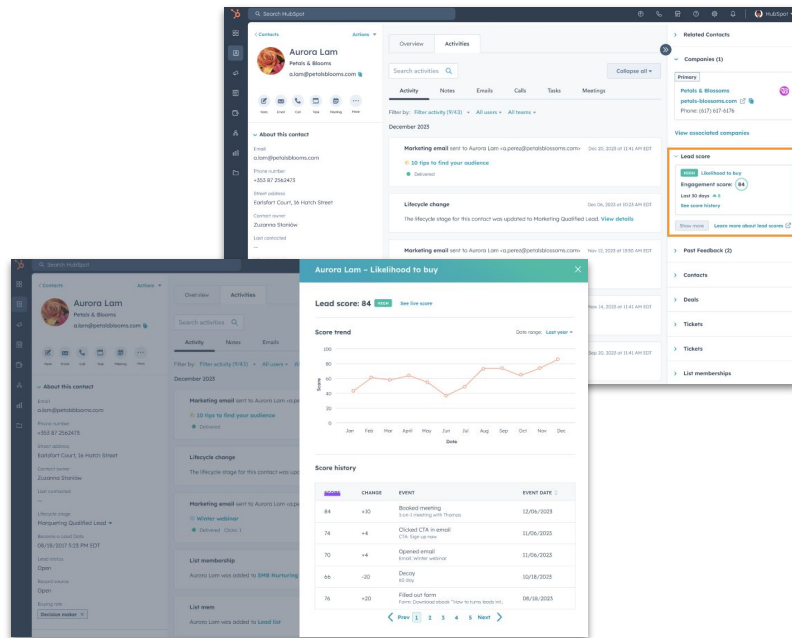
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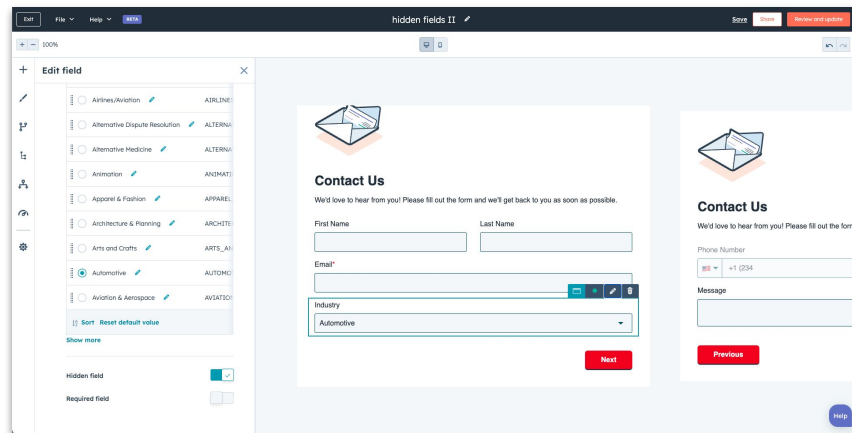


# Hidden Fields in the New Forms Editor

You can now use hidden form fields to automatically pass values into properties without requiring contacts to fill in those fields themselves.

## Use Case

For instance, when a contact submits a "Request a Quote" form, you can set their Status to "Open" using a hidden field, streamlining your process and ensuring accurate tracking without adding extra steps for the user. This feature enhances your data management and improves user experience by simplifying the form submission process.



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# Translations in the New Forms Editor

Set a default language for your forms, automatically translating error messages, field labels, help text, placeholder text, and default values. Additionally, AI Translations enable seamless translation of all form content, including custom labels and consent text, with easy updates for any new content.

## Use Case

This feature allows for the creation of forms tailored to your audience's preferred language, ensuring clarity and comprehension for all users. By offering forms in multiple languages, you enhance the user experience and boost conversion rates among diverse visitor

**Launch region:** Global

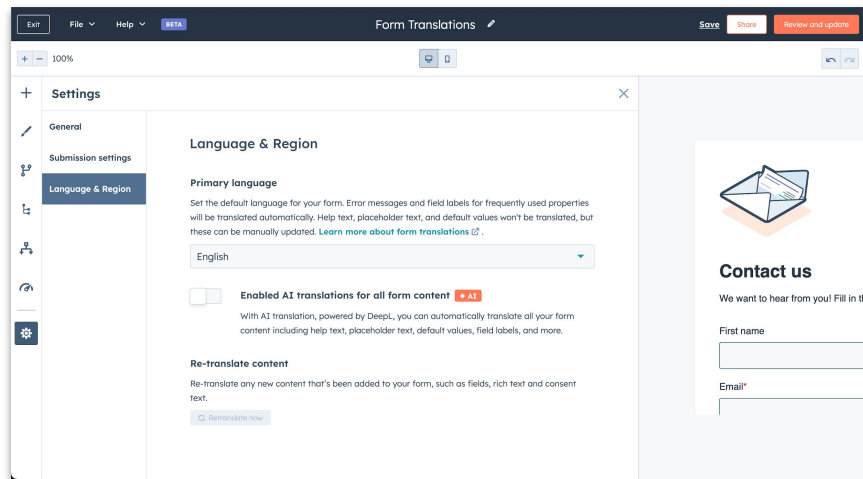
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# Conditional Redirects in the New Forms Editor

Conditional Redirects allows you to re-direct visitors to Hubspot Pages, External Pages or Meeting Scheduling Pages based on their responses and streamlines the journey from lead capture to conversion.

## Use Case

This capability allows you to efficiently direct visitors based on their interests or needs, ensuring they receive relevant information or actions—like booking a meeting or accessing further details—making it easier for them to engage with your brand and increasing the chances of conversion.

**Launch region:** Global

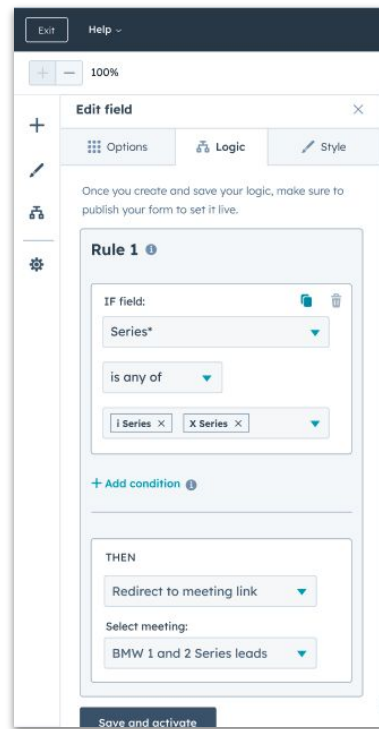
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# AI suggested tasks from comments

You can now generate tasks directly from comment threads in HubSpot, powered by AI, making it easy to track action items and follow up on collaborative work. This feature streamlines the process of managing tasks within busy comment threads.

## Use Case

By turning comments into actionable tasks with dedicated assignees and due dates, you can ensure that nothing falls through the cracks. This not only enhances visibility into your team's activities but also helps you stay organized and on top of your marketing efforts, improving overall productivity.

Launch region: Global

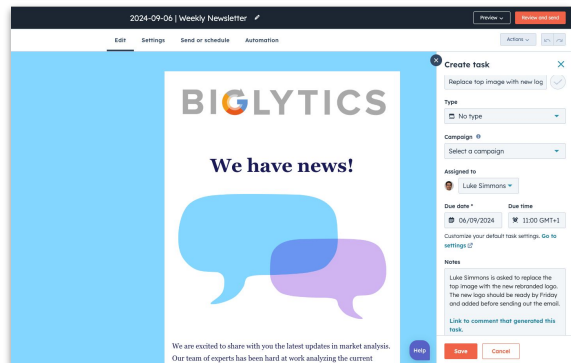
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# AI-assisted Insights for Reports

Introducing AI-assisted Insights for Reports built to provide quick, data-backed insights for your Reports so you spend less time interpreting and more time taking action. AI Insights for Reports enables you to get concise summaries and takeaways for your report with just one click.

## Use Case

In today's data-driven world, the ability to quickly interpret reports is more important than ever. By evaluating your report's configuration and data, HubSpot AI assists you in uncovering the data-backed takeaways you need to make informed decisions.

**Launch region:** Global

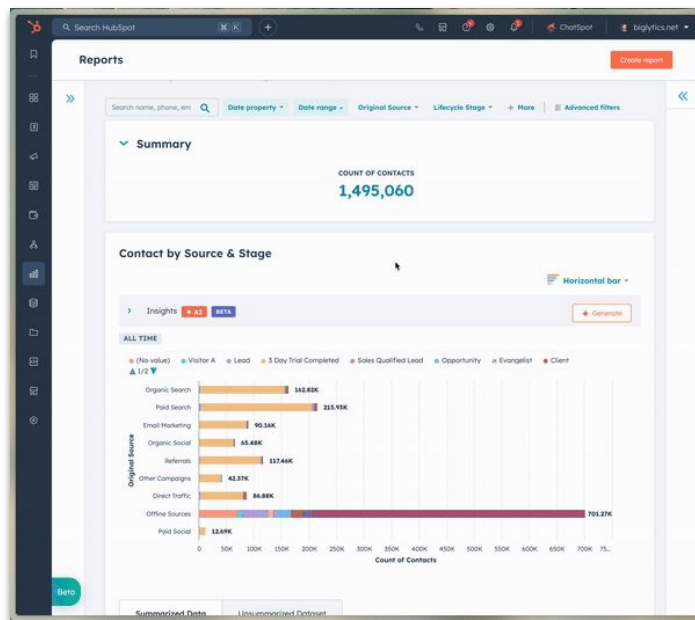
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# ChatSpot in the Marketing Email Editor

Collaborate mode is a new ChatSpot feature that lets you generate and edit text using AI through conversational interactions, replacing the previous slash and highlight commands. This gives you a more personalized and flexible content creation experience directly within the app.

## Use Case

With collaborate mode, you can quickly generate and refine text for your marketing emails without needing to switch to external tools. This streamlined process enhances your productivity, making it easier to create tailored content that meets your specific needs efficiently.

**Launch region:** Global

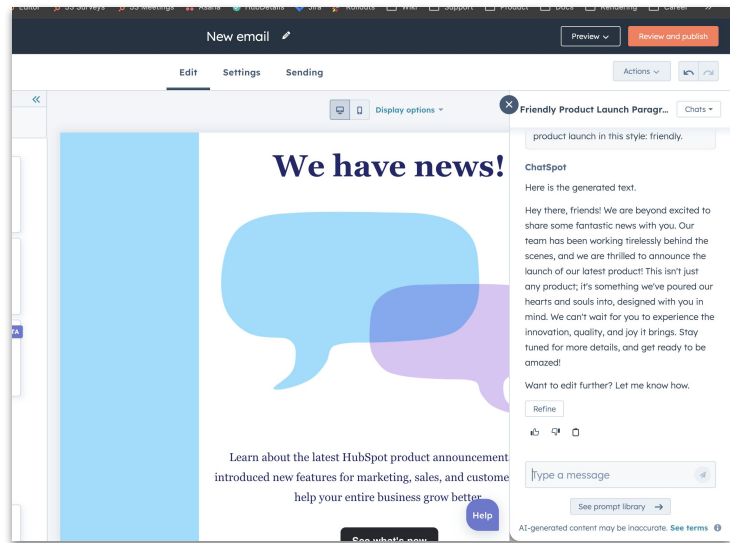
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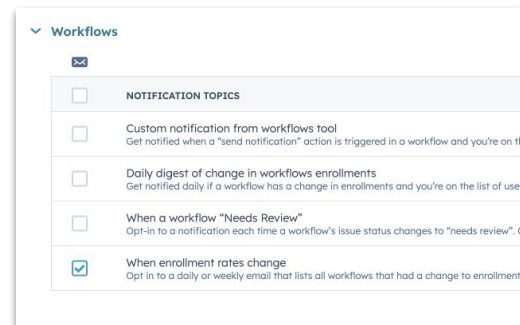
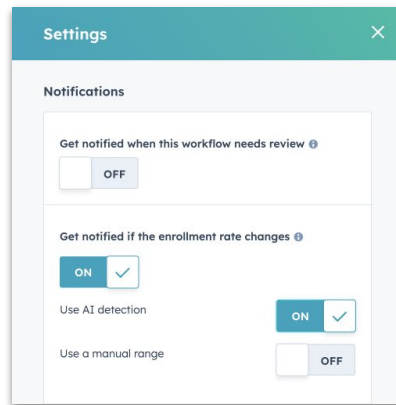


# Workflow Enrollment Anomalies Identified by HubSpot AI

HubSpot now uses AI to automatically detect unusual changes in workflow enrollment rates, allowing you to receive notifications when these rates fluctuate for specific workflows. This feature streamlines monitoring and enhances responsiveness.

## Use Case

Enabling AI-powered notifications keeps you informed about significant dips or spikes in enrollment rates without the need for manual calculations. This proactive approach ensures quick action on potential workflow issues, optimizing their effectiveness and improving overall business performance.



Launch region: Global

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# Primary Campaigns data source now available in the Custom Report Builder

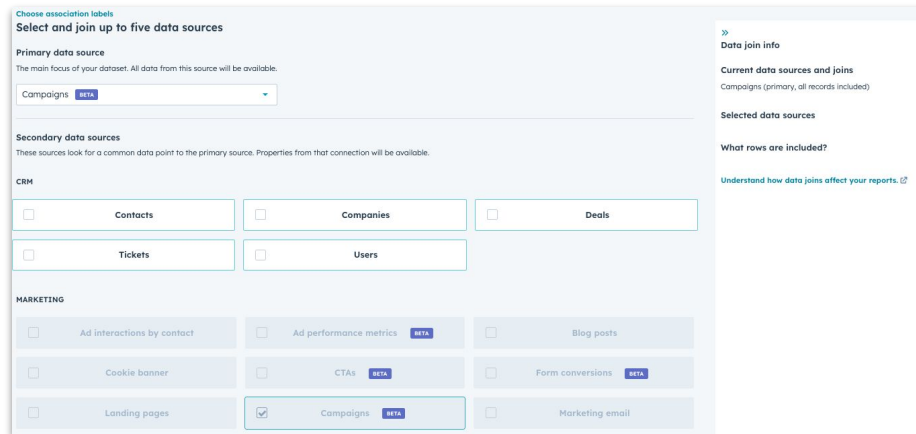
[Learn More](#)

Create custom campaign reports in HubSpot's Custom Report Builder using the new 'Campaigns' data source. This feature combines various campaign properties and the 'influenced contacts' event for streamlined reporting.

## Use Case

This functionality allows you to analyze key metrics, such as the number of influenced contacts and companies per campaign, as well as total spend versus budget. It helps you evaluate campaign success by identifying which campaigns generate the most page views or use the widest variety of channels.

**Launch region:** Global

[Free](#)[Starter](#)[Pro](#)[Enterprise](#)[Public Beta](#)

# Marketing SMS Short Codes

HubSpot now supports Short Codes for SMS messaging, allowing US-based customers to use 5-6 digit numbers for high-volume communication. These Short Codes offer consistent messaging throughput, unlimited volume, and minimal carrier filtering, making them ideal for promotional campaigns, alerts, and emergency notifications.

## Use Case

This feature allows businesses to scale their SMS marketing efforts, ensuring timely delivery for high-impact campaigns like flash sales or urgent alerts. With improved deliverability and speed, you can connect with your audience more effectively than ever.

**Launch region:** Global

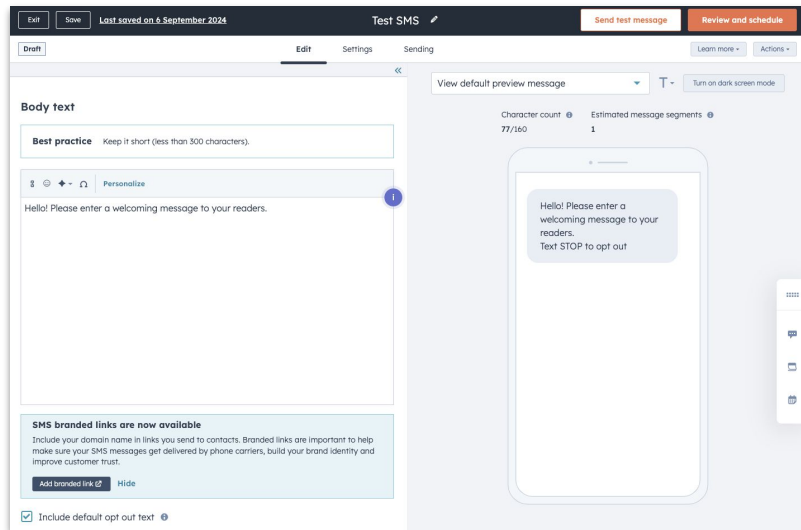
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Enterprise

Public Beta





# Usability improvements for Tracking URL Builder

[Learn More](#)

This update introduces essential usability improvements to the Tracking URL Builder, enhancing its responsiveness, defaulting URLs to HTTPS, and improving error handling. Tracking URLs are now more accessible within Campaigns, included in the "Add Assets" experience, and visible in the "Assets" tab for easier management.

## Use Case

With these enhancements, you can create and manage tracking URLs more efficiently, ensuring your links are properly formatted and secure. This streamlines your marketing campaigns by allowing you to easily track performance across channels, helping you make data-driven decisions and optimize your strategies.

**Launch region:** Global

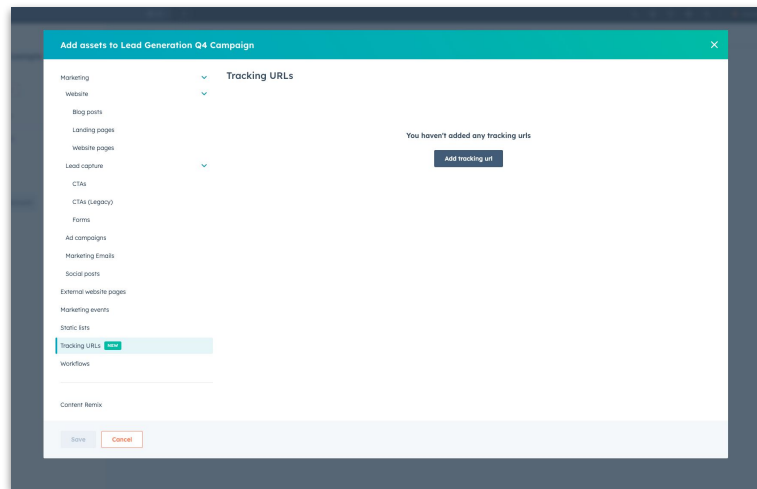
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# LinkedIn CAPI for Lifecycle Stage Change Events

[Learn More](#)

HubSpot has enhanced its integration with LinkedIn's Conversions API, allowing you to send lifecycle stage change event data directly to LinkedIn as conversions. This update simplifies the process of replacing existing lifecycle stage change events with the new API, ensuring seamless data flow.

## Use Case

By integrating your HubSpot data with LinkedIn, you can optimize ad targeting and improve campaign performance by sharing valuable insights about customer interactions. This connection helps you better understand how your campaigns influence actions, leading to more effective lead generation and conversion strategies.

**Launch region:** Global

Free

Starter

Pro


Enterprise

Public Beta

### 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**

 LinkedIn ▼

**Ad account**

HubSpot Ads testing ▼

**Authorization needed for LinkedIn Events**

To create LinkedIn events with CAPI, you need to give HubSpot permission to upload your conversion data to LinkedIn by signing into your account.

[Sign in to LinkedIn](#)

**Event trigger**

Lifecycle stage change

# AI powered Gibberish Spam Detection in form submissions

AI-powered gibberish detection identifies incoming form submissions with gibberish data in the contact first name, last name, and message properties.

## Use Case

Spam Form Submissions are a pain for marketers. One of the common types of spam is junk data entered into form fields that do not mean anything. These junk form submissions not only pollute CRM data but also create a lot of overhead for already stretched marketing teams, but not any more.

Launch region: Global

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### Submission details

**56648295449**

Submission record

Submitted May 28, 2024 10:23 AM EDT (17 days ago)

Spam Properties (4)

Spam type  
Gibberish

Spam description  
This submission was caught in the spam filter because it contained gibberish in one of the fields. This shows a submission isn't genuine.

Field name  
First name

Field value  
jafakjbaf

Submission Properties (4)

First name  
jafakjbaf

Last name  
Narayan

Message  
This is a test message. How are you doing?

Email  
Udit.Narayan@testmail.com

# New order- and cart-based workflow templates available

Three new order- and cart-based workflow templates are now available in beta in the workflow template library: Ecommerce Welcome Workflow, Abandoned Cart Workflow, and Re-engagement Workflow.

## Use Case

If you're using HubSpot's orders and carts objects, you can now set up workflows using these out-of-the-box workflow templates to provide your ecommerce customers a seamless customer experience.

Launch region: Global

Free

Starter

Pro

Enterprise

Live

### Send welcome email to new ecommerce customers

**Purpose:**  
Thank new customers and welcome them to your ecommerce store with a well-timed email once they place their first order. Take the opportunity to give them a sense of your brand and highlight some of your most popular products.

**What you'll need to prepare:**

- The welcome email you want to send

[Use template](#)

Compatible with your HubSpot plan

**Template preview**

Triggered

A contact places an order that moves to the Processed stag...

Send a welcome email

### Send re-engagement email to ecommerce customers

**Purpose:**  
When it's been a while since a customer has placed an order, re-engage them with an enticing email. Include a discount code to nudge them to buy again.

**What you'll need to prepare:**

- The re-engagement email you want to send

[Use template](#)

Compatible with your HubSpot plan

**Template preview**

Triggered

A customer has not placed an order in 90 days

Send a re-engagement email

### Send abandoned cart emails

**Purpose:**  
When a customer almost makes a purchase but doesn't go through with it, encourage them to complete their transaction with compelling emails. Try enticing them with special discounts or promotions.

**What you'll need to prepare:**

- Your e-commerce store domain
- The abandoned cart email you want to send

[Use template](#)

Compatible with your HubSpot plan

**Template preview**

Triggered

A contact puts an item in their cart but does not complete t...

Send an abandoned cart email

# Messaging Insights

Messaging insights provide marketers with quick, informative insights and actionable recommendations to enhance their email marketing strategies. This feature alerts users to performance deviations, enabling them to make informed adjustments based on both positive and negative trends.

## Use Case

Understanding messaging performance can be time-consuming, and knowing the next steps can be challenging. With HubSpot's proactive insights, users can save time and streamline their strategies, ensuring they respond effectively to changes in email performance and improve overall engagement.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta

# Marketing Analytics Suite in Public Beta

The Marketing Analytics Suite is HubSpot's first dedicated solution that centralizes key marketing metrics and reports in one user-friendly platform.

## Use Case

This suite streamlines insights from various channels—like ads, lead capture, and web traffic—making it easier for you to evaluate performance and identify what's working. With a consistent interface and customizable reporting options, you can quickly navigate through data and integrate these insights into your dashboards for a comprehensive view of your marketing effectiveness.

**Launch region:** Global

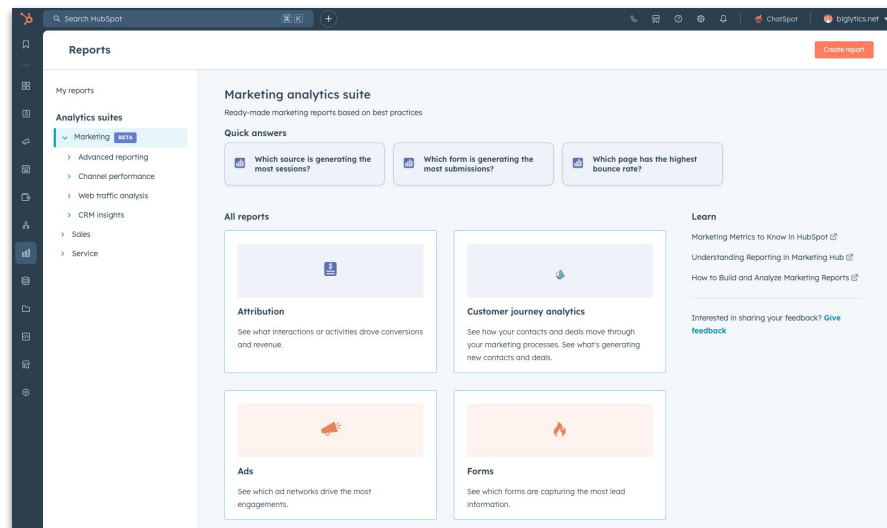
Free

Starter

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Enterprise

Public Beta



# Updated Email Subscription APIs

The updated Email Subscription APIs enhance flexibility for managing contact subscriptions across various tools, enabling businesses to tailor solutions to their specific needs. Key features include the ability to manage subscriptions for multiple types and support for Business Units.

## Use Case

These enhancements empower you to seamlessly integrate subscription management with external tools, ensuring compliance and improving customer engagement. Whether creating custom preference centers or syncing contact statuses, companies can drive more effective email communications and elevate your marketing strategies.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Live

# Migrating Facebook Page View Events from Settings to Events Tab

[Learn More](#)

HubSpot has revamped the integration with Facebook's Conversions API to create a more consistent experience across our ad conversion event offerings.

## Use Case

This update enhances the reliability of your marketing data connection to Meta, leading to better ad targeting and reduced cost per action. By using the Conversions API alongside the pixel, you gain improved measurement and increased control over your data, ultimately optimizing your advertising efforts across Meta technologies.

**Launch region:** Global

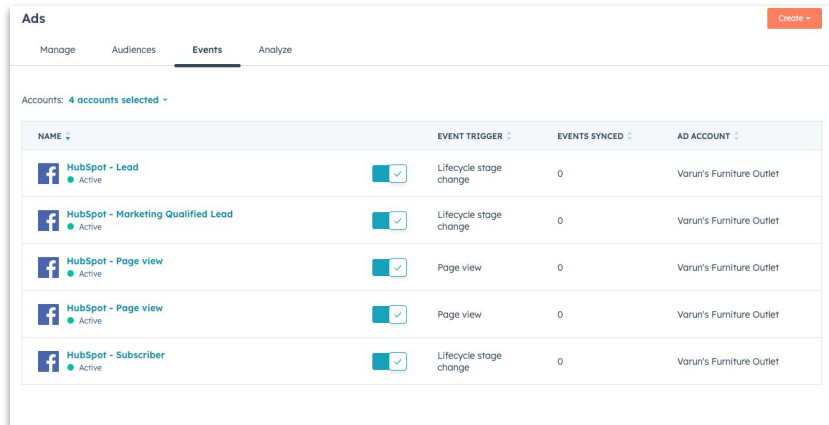
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The screenshot shows the HubSpot Ads interface with the 'Events' tab selected. It displays a table of Facebook events with columns for Name, Event Trigger, Events Synced, and Ad Account. All events are marked as 'Active' and have 0 events synced.

NAME	EVENT TRIGGER	EVENTS SYNCED	AD ACCOUNT
HubSpot - Lead Active	Lifecycle stage change	0	Varun's Furniture Outlet
HubSpot - Marketing Qualified Lead Active	Lifecycle stage change	0	Varun's Furniture Outlet
HubSpot - Page view Active	Page view	0	Varun's Furniture Outlet
HubSpot - Page view Active	Page view	0	Varun's Furniture Outlet
HubSpot - Subscriber Active	Lifecycle stage change	0	Varun's Furniture Outlet





**Content Hub™**



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# Adobe Express

[Learn More](#)

Now, you can use Adobe's AI content creation app directly within HubSpot when editing content.

## Use Case

Create high-quality assets effortlessly with the Adobe Express integration, allowing you to design and edit graphics before seamlessly inserting them into your HubSpot social posts, ads, pages, or emails. You can also enhance both AI-generated and uploaded images by cropping, removing backgrounds, and applying edits, all without draining your resources.

**Launch region:** Global

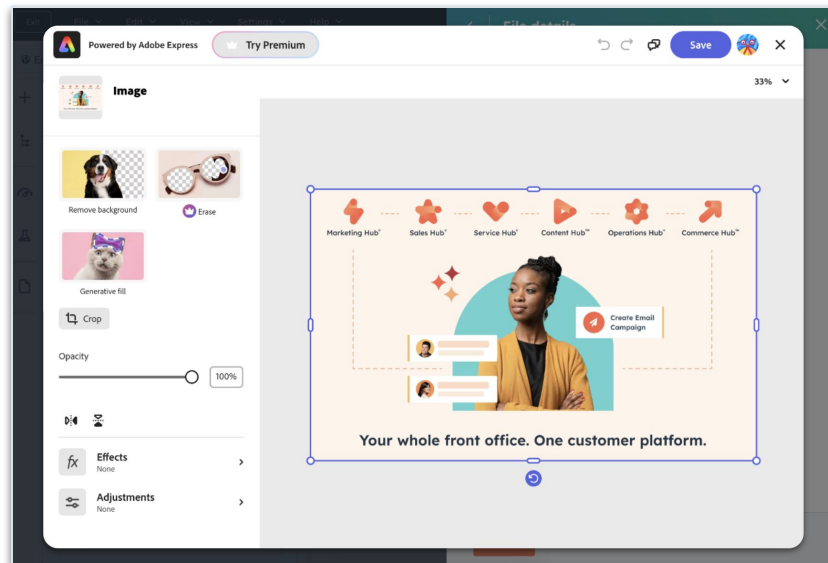
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Public Beta



# Special Offer for Adobe Express Premium Plan for Teams (Get Complimentary Four Months)

HubSpot customers can now enjoy a complimentary four-month access to the Adobe Express Premium plan for teams, allowing them to utilize Adobe's AI-driven content creation tools.

## Use Case

With the recent integration between HubSpot and Adobe Express, this limited-time offer empowers you to create stunning visuals for social media, marketing materials, and emails—enhancing your marketing efforts and streamlining your creative process.

**Launch region:** Global

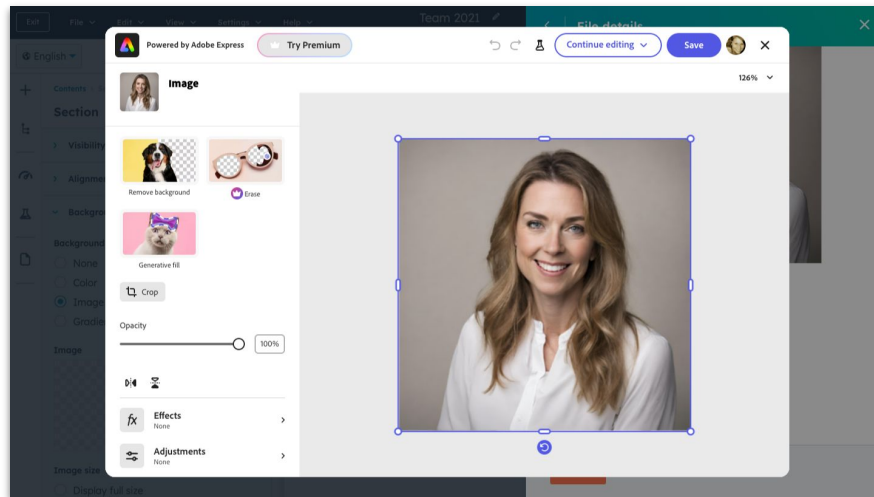
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# Case studies content type

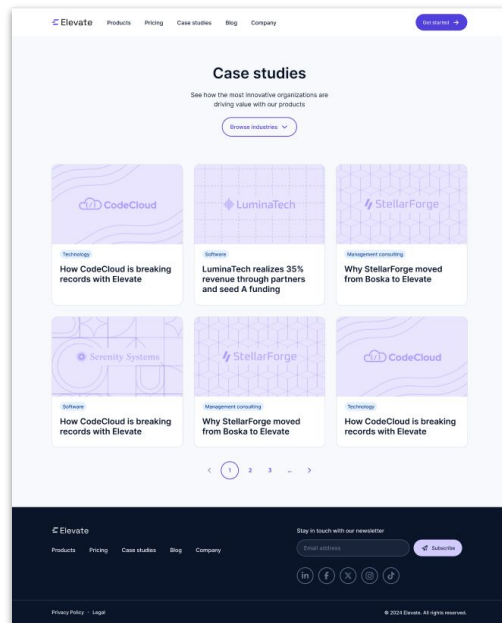
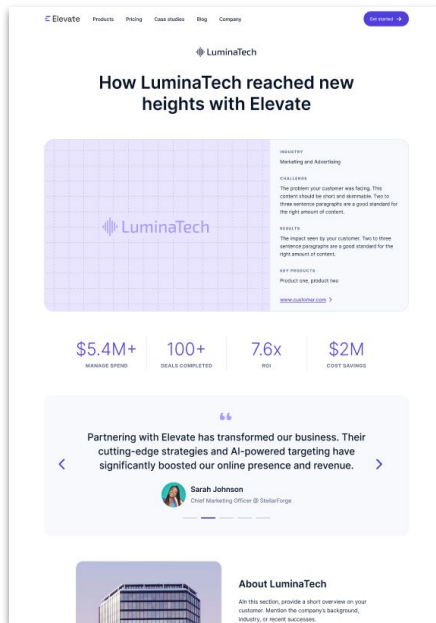
Our new case studies content type allows you to effectively showcase client success stories, making it easier to manage drafts and published studies. You can use a WYSIWYG editor to create visually appealing case studies and build a library on your website that can be filtered by industry or services.

## Use Case

Marketers can quickly produce and publish impactful case studies to enhance their website, helping to capture leads and close deals. With AI support, you can effortlessly consolidate notes and transcripts into ready-to-go drafts, streamlining the creation process.

Launch region: Global

- Free
- Starter
- Pro
- Enterprise
- Public Beta



# Use multiple AI voices in a podcast episode

In the podcast editor, you can now assign unique AI voices to different sections, allowing for a more dynamic and engaging listening experience.

## Use Case

This feature enables you to create conversational podcasts or multi-host narrations, enhancing the storytelling aspect. By using distinct voices, you can keep your audience more engaged and make your content stand out.

**Launch region:** Global

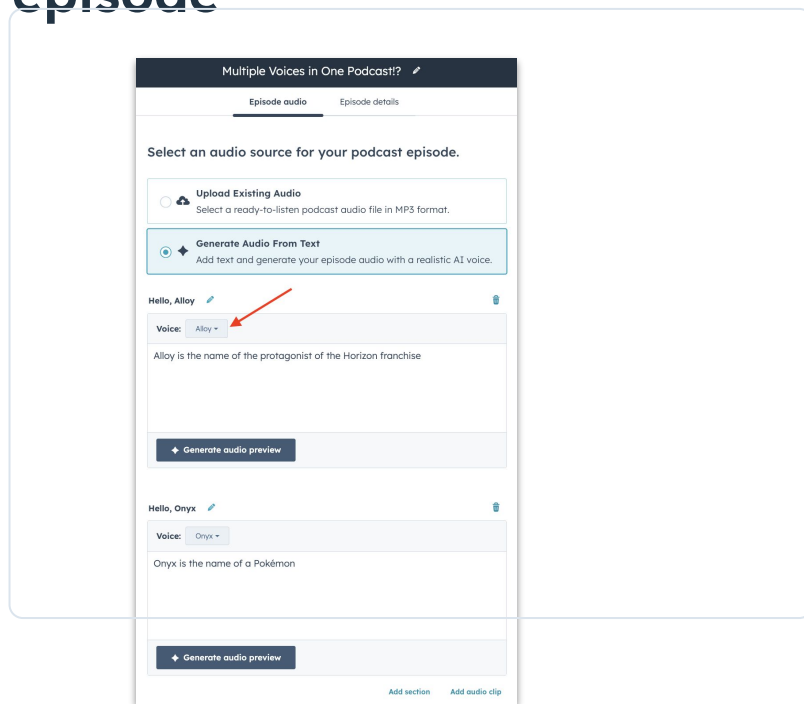
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# AI-Powered File & Image Search

[Learn More](#)

Finding files and images previously used in your content is now easier than ever.

## Use Case

By leveraging AI to analyze your public files, descriptions and keyword tags are automatically generated, making it easy for you to search using natural language and find relevant content quickly. This enhancement simplifies the process of locating and reusing your uploaded files and images, saving you valuable time and effort.

**Launch region:** Global

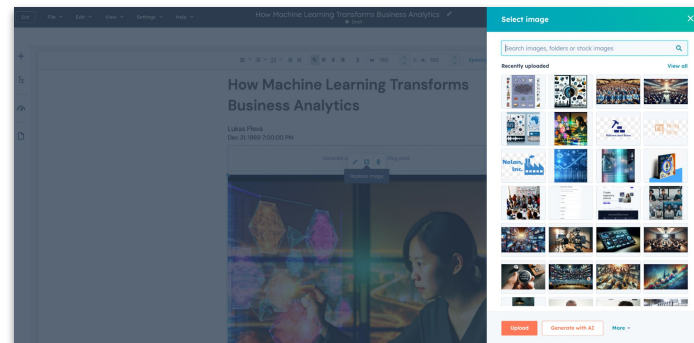
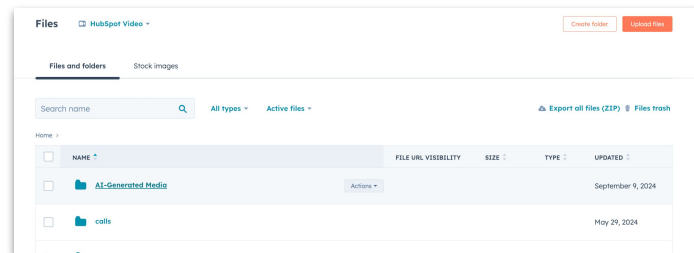
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**Marketing Hub<sup>®</sup>**

+



**Content Hub<sup>™</sup>**



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# Better Quality AI-Generated Images

HubSpot's AI Image Generator will now produce better images, even faster than before.

## Use Case

With enhancements to our AI Image Generator, the quality of images meets and exceeds your expectations, addressing previous concerns from marketers and content creators. These improvements ensure that you can rely on AI to produce high-quality visuals for your projects, enhancing your overall content.

**Launch region:** Global

Free

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## Content assistant in HubDB rich text fields

You can now leverage the AI content assistant within rich text cells in HubDB, allowing for the generation and enhancement of content directly through AI. This integration streamlines the content creation process, making it easier to publish high-quality materials.

### Use Case

By using the AI content assistant, you can quickly generate ideas or refine your content, significantly speeding up your workflow and enhancing the overall quality of your HubDB content. This feature helps you maintain a competitive edge by facilitating efficient and effective content creation.

**Launch region:** Global

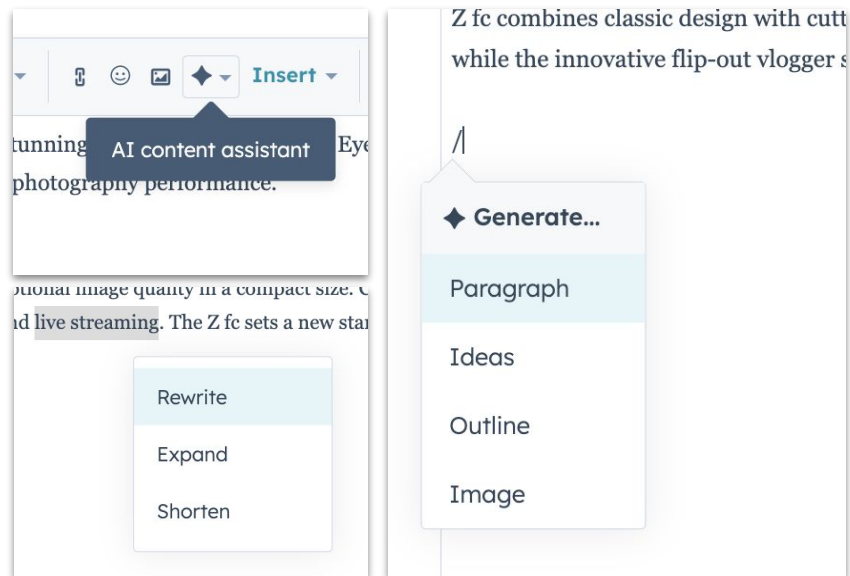
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Public Beta



## Easier collaboration with ChatSpot in CTAs

ChatSpot is now powered by collaborate mode and works within CTAs. This new functionality allows you to interact conversationally with AI to write and edit text within your CTAs. Previously, you were limited to the options in the dropdown menu, but now you can draft and edit text with open-ended prompts directly within ChatSpot.

### Use Case

Collaborate mode provides a more interactive and flexible CTA creation and editing experience. It saves you time by allowing you to generate and refine text directly within the CTA app, without requiring a switch to external AI tools or starting to draft your CTA manually from scratch.

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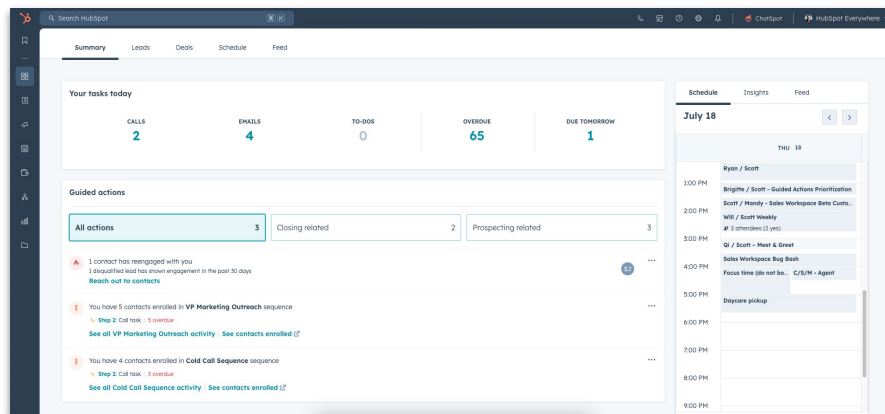


# Introducing the Sales Workspace

The prospecting workspace has been reimagined as the sales workspace, allowing you to manage pipeline generation and deal closure from a single platform.

## Use Case

With the sales workspace, you can seamlessly prioritize and execute essential tasks for both generating pipeline and closing deals, eliminating the need to switch between different tools. This integration enhances your productivity and helps you focus on achieving your sales goals more effectively.



Launch region: Global

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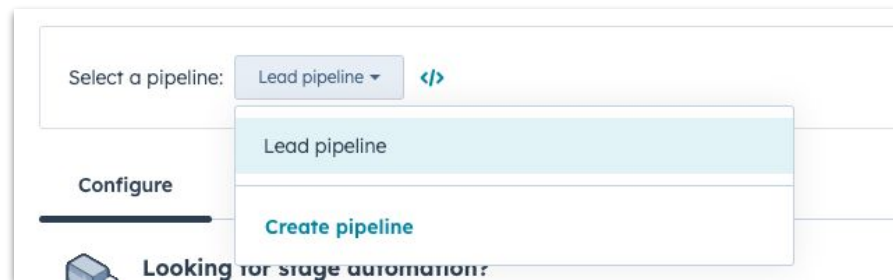


## Multiple Lead Pipelines

You can now utilize multiple lead pipelines in HubSpot, allowing you to represent distinct qualification processes for your leads. This enhancement provides greater flexibility in managing your lead qualification without compromising data quality.

### Use Case

If your organization has different qualification workflows for various lead types, you can create separate pipelines to streamline the process. This ensures that each lead is tracked and managed according to its specific journey, improving overall efficiency and clarity.



**Launch region:** Global

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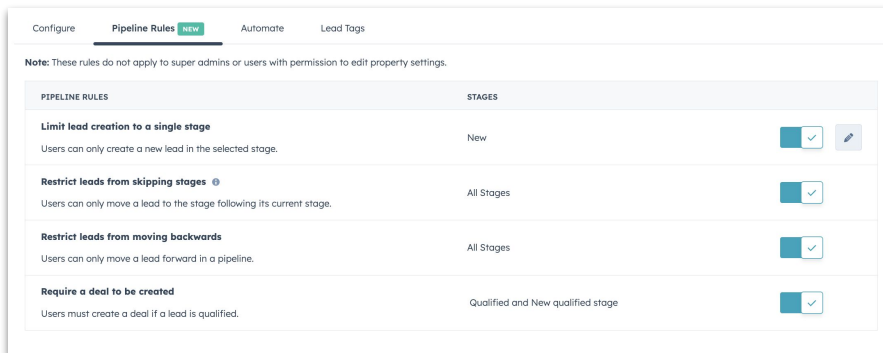


# Pipeline Rules for Leads


You can now join the public beta to set and manage rules for your lead pipelines, enhancing your control and ensuring the integrity of your data.

## Use Case

By implementing these pipeline rules, you can streamline your lead management process and maintain accurate reporting, ensuring your team follows the correct workflow. This helps you protect data integrity and optimize your lead conversion efforts effectively.



The screenshot shows the 'Pipeline Rules' configuration page. At the top, there are tabs for 'Configure', 'Pipeline Rules' (which is active and has a 'NEW' badge), 'Automate', and 'Lead Tags'. Below the tabs is a note: 'Note: These rules do not apply to super admins or users with permission to edit property settings.' The main content is a table with two columns: 'PIPELINE RULES' and 'STAGES'. There are four rows of rules, each with a description, a stage selection, and a toggle switch.

PIPELINE RULES	STAGES	
<b>Limit lead creation to a single stage</b> Users can only create a new lead in the selected stage.	New	<input checked="" type="checkbox"/> 
<b>Restrict leads from skipping stages</b> ⓘ Users can only move a lead to the stage following its current stage.	All Stages	<input checked="" type="checkbox"/>
<b>Restrict leads from moving backwards</b> Users can only move a lead forward in a pipeline.	All Stages	<input checked="" type="checkbox"/>
<b>Require a deal to be created</b> Users must create a deal if a lead is qualified.	Qualified and New qualified stage	<input checked="" type="checkbox"/>

Launch region: Global

Free

Starter

Pro

Enterprise

Public Beta



# Leads Summary Public Beta

Introducing the new Leads Summary feature, designed for admins to effortlessly view and manage lead data at scale while gaining valuable insights into lead performance through embedded funnel reporting.

## Use Case

With the Leads Summary feature, you can quickly assess the health of your lead pipeline, identify trends, and make data-driven decisions to optimize your strategies—all in one centralized space. This means more efficient lead management and enhanced visibility into your sales performance, empowering you to drive growth effectively.

**Launch region:** Global

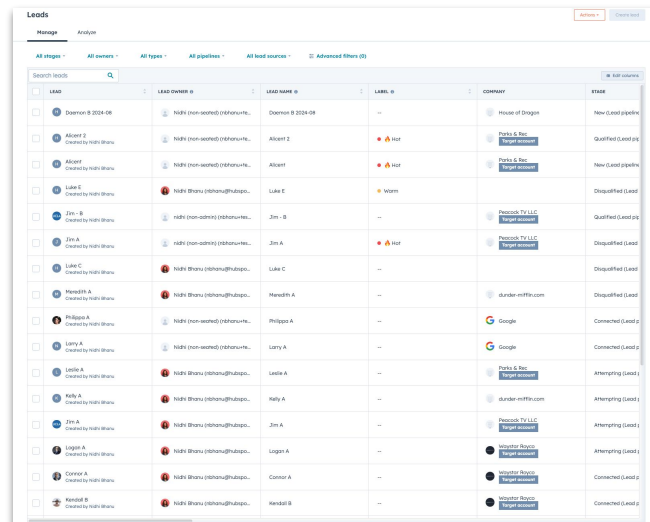
Free

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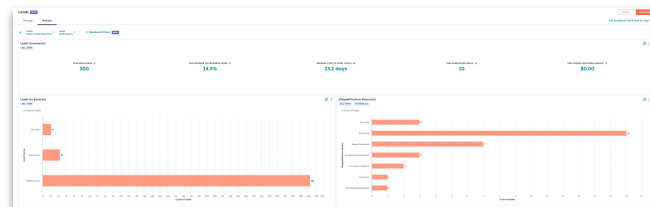
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Public Beta



The screenshot shows a 'Leads' management interface with a table of lead records. The table has columns for 'LEAD ID', 'LEAD OWNER ID', 'LEAD NAME ID', 'LABEL ID', 'COMMENT', and 'STATE'. The 'STATE' column includes various lead statuses such as 'New Lead pipeline', 'Qualified Lead pipeline', 'Disqualified Lead', 'Connected Lead pipeline', and 'Attempting Lead pipeline'. Some rows have red warning icons and labels like 'Hot' or 'Warm'.





# Sales Hub Everywhere with the HubSpot Sales Chrome Extension

Sales teams can now use the HubSpot Sales Chrome extension and ChatSpot from anywhere on the web. You can research prospects, enroll contacts in sequences, send emails, make calls, and view CRM records, while ChatSpot provides additional insights into companies and contacts.

## Use Case

To build pipeline and drive revenue, salespeople need to start contextual conversations efficiently and at scale. The enhanced HubSpot Sales Chrome extension now lets you research prospects and use Sales Hub's engagement tools directly from their websites, eliminating the need to switch between windows for research and CRM tasks.

**Launch region:** Global

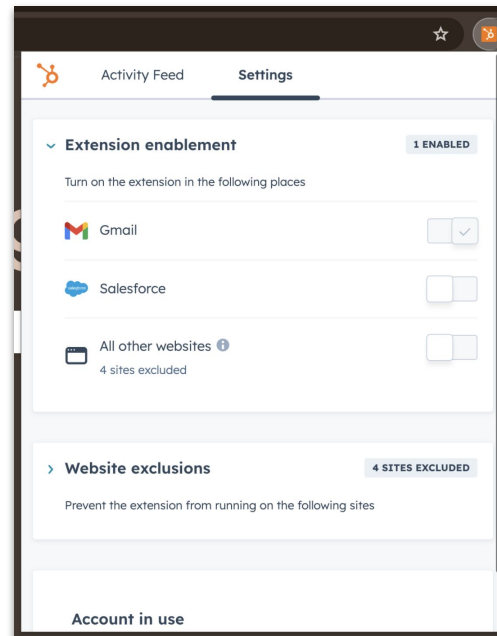
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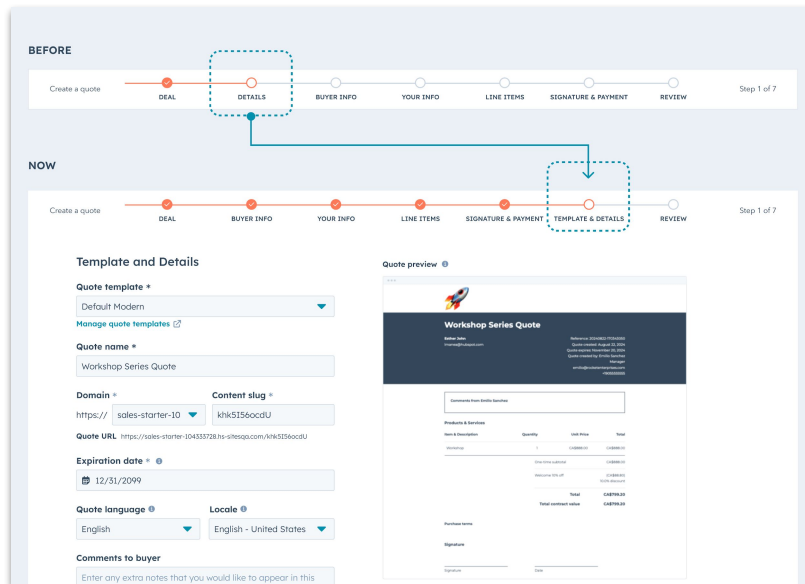
# Updated Quote Setup Wizard Order

The updated Quote Setup Order introduces a redesign that allows you to enter essential data for a quote before selecting the quote template. The "Details" step has been renamed to "Template & Details" and moved later in the setup wizard for a more logical flow.

## Use Case

This new order helps you create a more accurate and tailored quote by ensuring all relevant information is entered first, resulting in a clearer and more effective template selection. The streamlined process enhances your overall efficiency and improves the quality of your quotes.

**Launch region:** Global



The screenshot illustrates the change in the Quote Setup Wizard flow. In the 'BEFORE' state, the steps are: Create a quote, DEAL, DETAILS, BUYER INFO, YOUR INFO, LINE ITEMS, SIGNATURE & PAYMENT, REVIEW. In the 'NOW' state, the steps are: Create a quote, DEAL, BUYER INFO, YOUR INFO, LINE ITEMS, SIGNATURE & PAYMENT, TEMPLATE & DETAILS, REVIEW. A dashed blue box highlights the 'DETAILS' step in the 'BEFORE' flow and the 'TEMPLATE & DETAILS' step in the 'NOW' flow, with an arrow indicating the move.

**BEFORE**

Create a quote → DEAL → DETAILS → BUYER INFO → YOUR INFO → LINE ITEMS → SIGNATURE & PAYMENT → REVIEW (Step 1 of 7)

**NOW**

Create a quote → DEAL → BUYER INFO → YOUR INFO → LINE ITEMS → SIGNATURE & PAYMENT → TEMPLATE & DETAILS → REVIEW (Step 1 of 7)

**Template and Details**

Quote template +  
Default Modern

Manage quote templates ?

Quote name +  
Workshop Series Quote

Domain +  
https://sales-starter-10

Content slug +  
khk5T56ccdu

Quote URL <https://sales-starter-104333728.hs-sitesqa.com/khk5T56ccdu>

Expiration date +  
12/31/2099

Quote language +  
English

Locale +  
English - United States

Comments to buyer  
Enter any extra notes that you would like to appear in this

**Quote preview**

Workshop Series Quote

Item & Description	Quantity	Unit Price	Total
Product A	1	\$100.00	\$100.00
Product B	2	\$50.00	\$100.00
<b>Total</b>			<b>\$200.00</b>

Free

Starter

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Enterprise

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## Expanded Invoice Creation

You can now create invoices in any HubSpot-supported currency, expanding beyond just those that support online payments. This allows for seamless conversion of Deals and Quotes into Invoices in a wider range of currencies.

### Use Case

If you're working with international clients or using currencies not supported for online payments, you can now generate invoices in the appropriate currency. This flexibility ensures that you can manage your billing processes efficiently while still adhering to HubSpot's payment processing capabilities.

**Launch region:** Global

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# Mobile Sales Home

We're introducing a revamped Sales Home in the HubSpot mobile app, designed to serve as the central hub for sales reps and managers. This tailored homepage addresses the specific needs of each user based on their role, helping them effectively generate pipeline and close deals.

## Use Case

Sales reps can now seamlessly continue their work on mobile, quickly prioritize tasks, and engage more effectively with customers. By providing the right insights at the right time, we enhance productivity and empower teams to consistently return to Sales Home to drive results.

**Launch region:** Global

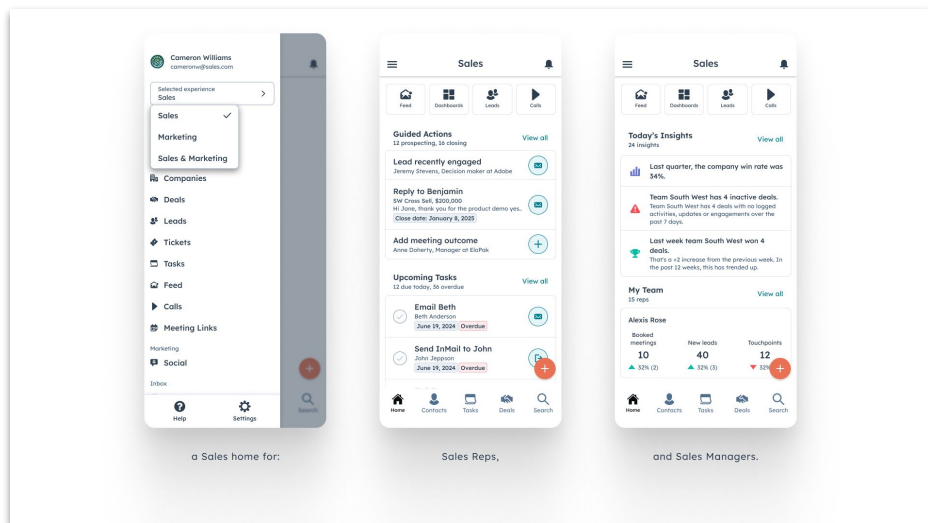
Free

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Enterprise

Public Beta





# Mobile AI-powered Guided Actions

Mobile sales reps can now access guided actions through HubSpot, allowing them to receive suggested next steps for building pipeline and closing deals while on-the-go.

## Use Case

This feature helps you quickly identify and prioritize leads and deals that need immediate attention, eliminating the guesswork in your decision-making process. For instance, you'll be alerted if a previously disqualified lead re-engages, enabling you to act promptly and maximize your sales opportunities.

Note: This initial mobile release will only support a subset of existing guided actions. More guided actions will be added to mobile in the upcoming weeks.

**Launch region:** Global

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# Company Health Score Builder

The Company Health Score tool allows you to weight properties and activities related to your contacts, resulting in a comprehensive score for each company record. This score will be displayed directly on the company record for easy reference.

## Use Case

Customer success teams want to uncover trends and opportunities in their customer base but often struggle to utilize their engagement data effectively. By automating the aggregation and evaluation of data, you can quickly identify high-value customers and potential churn risks, enabling proactive action for greater success!

**Launch region:** Global

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Starter

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Enterprise

Public Beta

## Health Score

NEUTRAL

Health Score

65

Last 30 days 15 ▲

Recent score change

+ 15 Company: , Property updated: CSM ..

[See score history](#)

[See score calculations](#) ↗

[Learn more about health scores](#) ↗



## Conditional SLA Rules

In Help Desk, you can now create conditional SLAs for new tickets from connected channels, tailoring response times based on ticket properties and associated objects.

### Use Case

As a B2B business, you can set specific SLAs for customers requiring faster responses, ensuring your support agents prioritize urgent tickets effectively. This helps you meet customer needs while optimizing your team's efficiency and maintaining high service standards.

Note: Conditional SLAs only apply to tickets created by Help desk-connected channels. Conditional SLAs only apply at ticket creation and do not update if ticket or associated properties are updated after ticket creation. Only users with a service seat will see SLAs on their tickets.

**Launch region:** Global

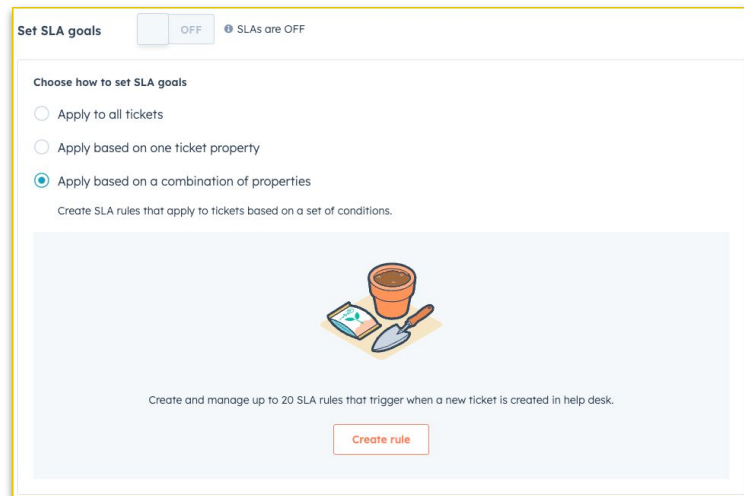
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The screenshot shows the 'Set SLA goals' configuration page. At the top, there is a toggle switch for 'OFF' and a status indicator 'SLAs are OFF'. Below this, the section 'Choose how to set SLA goals' contains three radio button options: 'Apply to all tickets', 'Apply based on one ticket property', and 'Apply based on a combination of properties'. The third option is selected. Below the radio buttons, there is a text prompt: 'Create SLA rules that apply to tickets based on a set of conditions.' This is followed by an illustration of a smartphone, a coffee cup, and a shovel. At the bottom of the illustration area, there is a text prompt: 'Create and manage up to 20 SLA rules that trigger when a new ticket is created in help desk.' and a red 'Create rule' button.



# Skill-based Ticket Routing for Live Chat

[Learn More](#)

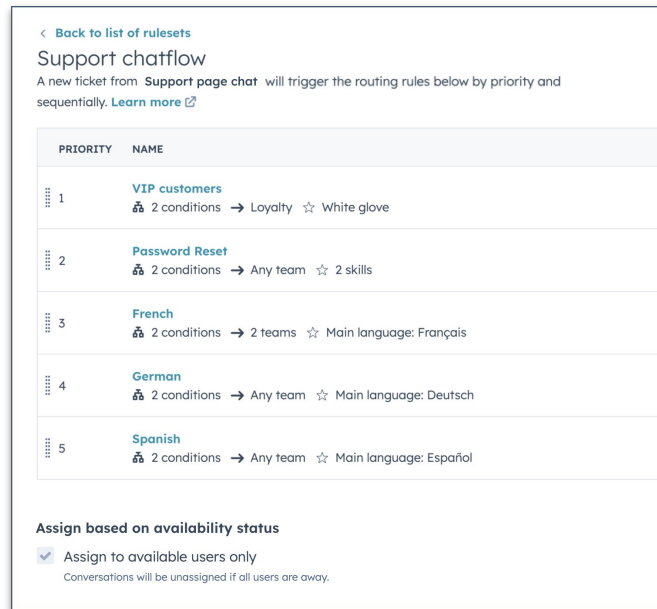
With skill-based ticket routing, you can quickly match incoming customer inquiries to the best-suited agent, ensuring efficient issue resolution.

## Use Case

Admins can now route live chats based on ticket properties, making it quicker to connect customers with the right agent. By focusing on skills for routing, you can easily maintain rules even as your workforce changes, ensuring consistent support.

Note: This feature is only available with Help Desk. Skill-based assignment requires the target teams and/or users to have a Service Hub paid seat. If a user does not have a service seat, they will not be considered in the routable pool of agents even if they have the skills and availability to take the ticket.

**Launch region:** Global

[Free](#)[Starter](#)[Pro](#)[Enterprise](#)[Public Beta](#)

< [Back to list of rulesets](#)

### Support chatflow

A new ticket from **Support page chat** will trigger the routing rules below by priority and sequentially. [Learn more](#)

PRIORITY	NAME
1	<b>VIP customers</b> 2 conditions → Loyalty ☆ White glove
2	<b>Password Reset</b> 2 conditions → Any team ☆ 2 skills
3	<b>French</b> 2 conditions → 2 teams ☆ Main language: Français
4	<b>German</b> 2 conditions → Any team ☆ Main language: Deutsch
5	<b>Spanish</b> 2 conditions → Any team ☆ Main language: Español

**Assign based on availability status**

Assign to available users only  
Conversations will be unassigned if all users are away.





# New AI writing tools in Conversations Inbox and Help Desk: proofreading, shortcut commands, regenerating, and more!

We're excited to introduce new AI writing tools for the Conversations Inbox composer, available across all channels. This update includes time-saving AI shortcuts, a popover modal for better control over generated responses, a Proofreading feature, and an enhanced Summarize feature to help you respond faster and more effectively.

## Use Case

By utilizing these AI tools, you can quickly draft, proofread, and summarize responses, making it easier to handle customer inquiries with high-quality, personalized support. This streamlined workflow allows you to enhance your efficiency and improve customer satisfaction in less time.

**Launch region:** Global

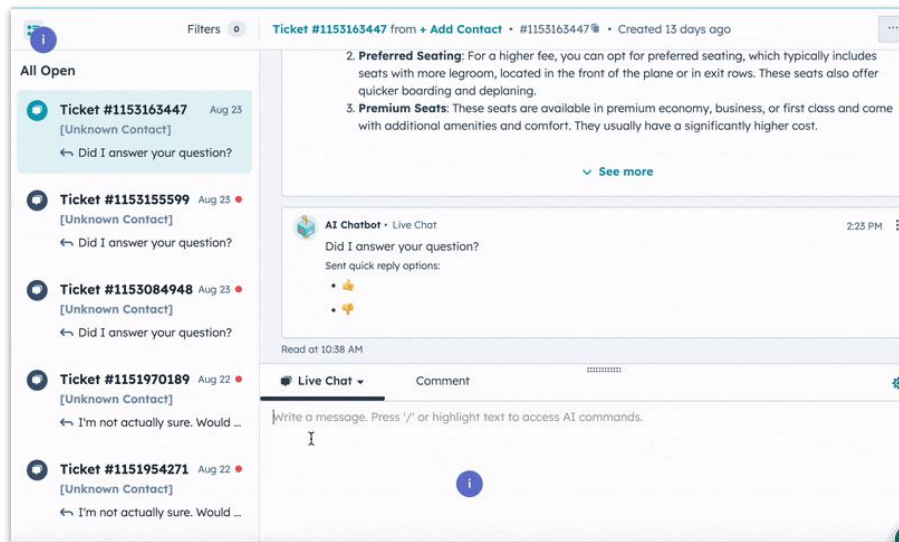
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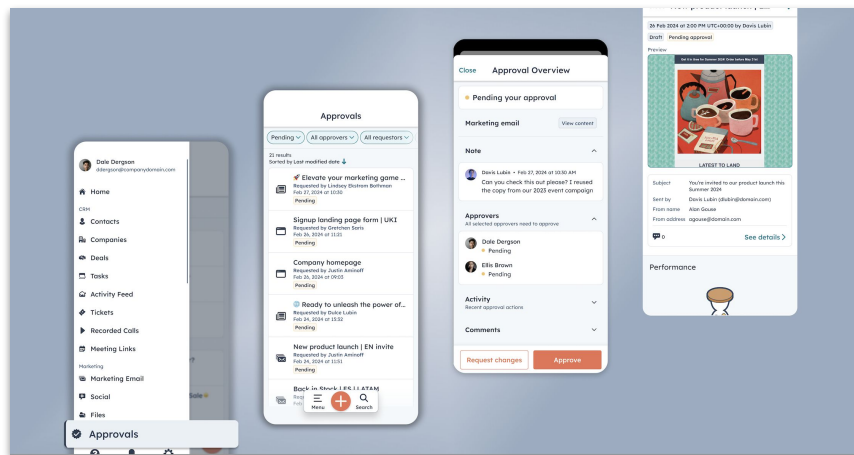


# Manage your Knowledge Base articles approvals on mobile

Knowledge base articles can now be approved directly from your mobile device, with all approvals visible and centralized in the HubSpot app. This enhancement streamlines the approval process, making it quicker and more efficient for both requestors and approvers.

## Use Case

When you're on the go and need to approve a knowledge base article, you can do so effortlessly from your mobile device. This capability ensures that content moves swiftly from creation to publication, enhancing collaboration between marketing and service teams.



**Launch region:** Global

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## Customizable Views Sidebar

You can now customize your views sidebar in the help desk! Blend default and custom views, rearrange views, and hide undesired views from sight in a collapsible "More" section.

### Use Case

This customization helps you streamline your workspace by focusing only on the most relevant views, reducing clutter in fast-paced support environments. For instance, support reps can quickly access critical views while keeping less relevant options out of sight, enhancing their efficiency in delivering exceptional customer service.

**Launch region:** Global

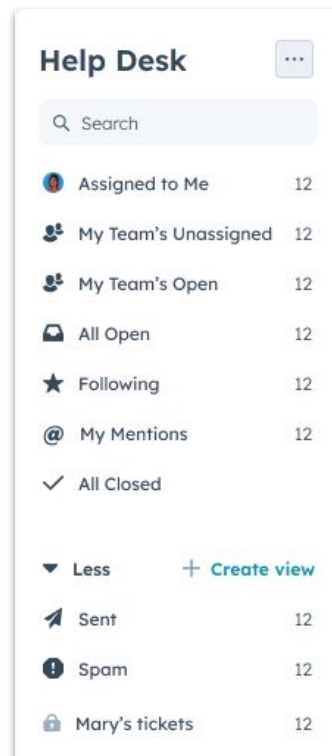
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The screenshot shows a sidebar titled "Help Desk" with a search bar and a list of views. The views are: "Assigned to Me" (12), "My Team's Unassigned" (12), "My Team's Open" (12), "All Open" (12), "Following" (12), "My Mentions" (12), "All Closed", "Less" (with a dropdown arrow), "+ Create view", "Sent" (12), "Spam" (12), and "Mary's tickets" (12).



# Copilot-Generated Ticket Summaries in Help Desk

The new "Ticket Summary" card, available in the help desk sidebar, provides an AI-generated overview of a ticket's conversation history, powered by Breeze Copilot.

## Use Case

Effective handoffs are essential for delivering a smooth support experience. By offering concise, AI-generated summaries, team members can easily catch up on ticket histories, enabling them to maintain a high level of service.

Note: For ticket summaries to work, "Generative AI > Standard CRM properties", "Generative AI > Customer conversation data" and "Copilot" all must be turned on in AI settings (which can be found under Account Management > AI).

**Launch region:** Global

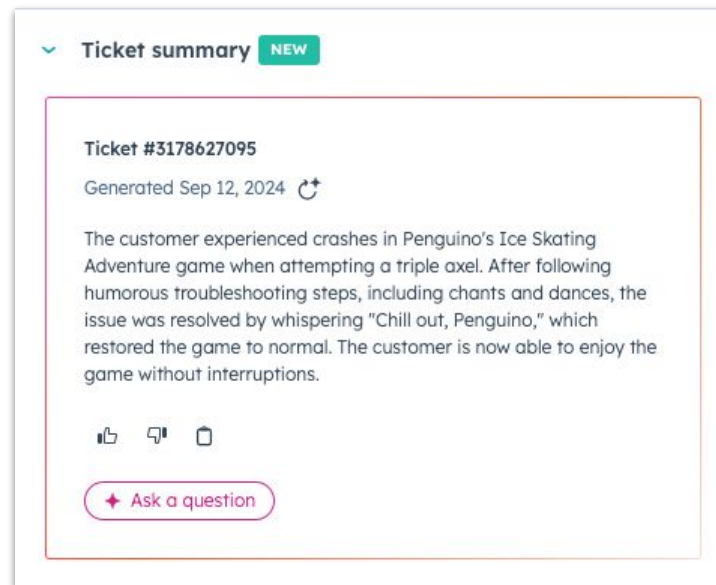
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Enterprise

Live



Ticket summary **NEW**

**Ticket #3178627095**  
Generated Sep 12, 2024 ↻

The customer experienced crashes in Penguin's Ice Skating Adventure game when attempting a triple axel. After following humorous troubleshooting steps, including chants and dances, the issue was resolved by whispering "Chill out, Penguino," which restored the game to normal. The customer is now able to enjoy the game without interruptions.

📄 🗒️ 📄

[+ Ask a question](#)



# Boost Support Team Efficiency with Reply Recommendations in Help Desk

Reply Recommendations in Help Desk is an AI-driven tool that helps service reps respond quickly across all channels (excluding WhatsApp). By suggesting tailored responses from your knowledge base and providing citations, agents can verify and reference their sources effortlessly.

## Use Case

Support teams often face the challenge of managing multiple inquiries while crafting personalized responses. With Reply Recommendations, agents save time on repetitive questions, ensuring accurate and trustworthy replies, which ultimately enhances customer satisfaction and trust.

**Launch region:** Global

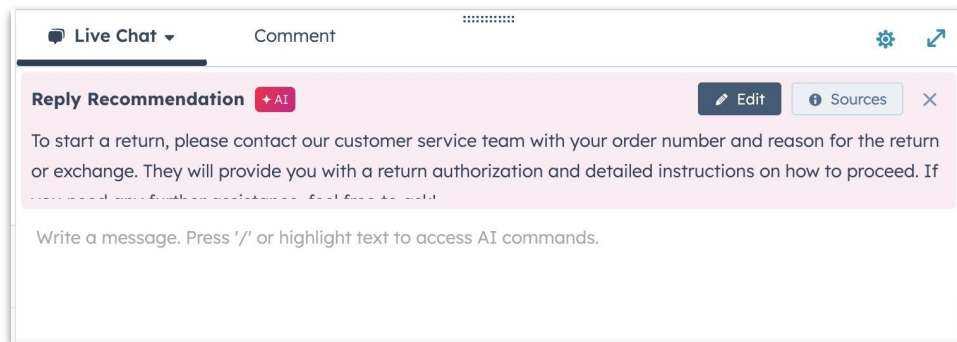
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# Streamlining self-service support and 24/7 availability

From September 25 to October 6, you'll have access to self-service support through the 24/7 Help widget, featuring tailored bot messaging and visibility into agent availability for live support options.

## Use Case

This enhancement offers you flexible, on-demand support even when live representatives are offline, while also providing clear information about when to expect direct assistance—empowering you to choose the best support channel for your needs.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta



**Sales Hub<sup>®</sup>**

+



**Service Hub<sup>®</sup>**



Powered by Breeze

# User changes to a meeting are now surfaced in the Audit Log

Tracking and auditing when you create, update, or delete a meeting or a meeting scheduling page is now surfaced in the Audit Log.

## Use Case

This information is valuable for answering questions such as who created, updated, or deleted a scheduling page, who booked a meeting, and who updated or deleted a meeting. These insights provide transparency on the user activities related to scheduling pages and meetings and help track user actions accurately.

Launch region: Global

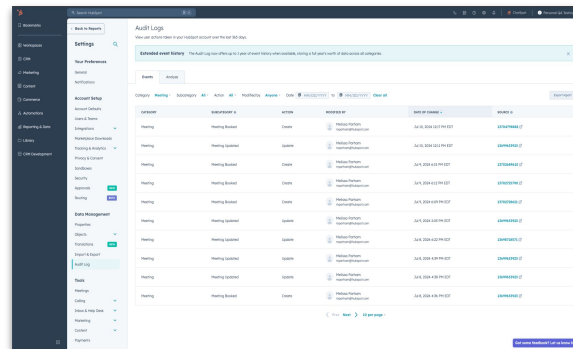
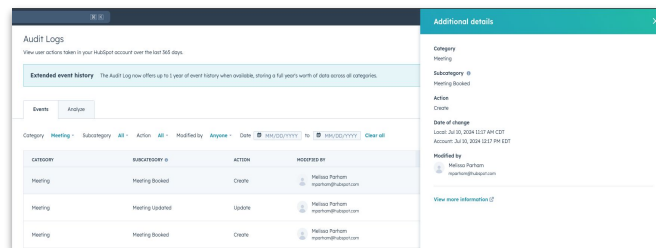
Free

Starter

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Enterprise

Live





# Make outbound calls using the Calling icon in the navigation

Easily make outbound calls by clicking the Calling icon in the navigation and entering the recipient's phone number. This new functionality simplifies the calling process within HubSpot.

## Use Case

Initiating calls from anywhere in the CRM means you can quickly reach out to contacts without being tied to specific pages, making your outreach more efficient and responsive. This flexibility enhances your ability to connect with leads and customers seamlessly.

**Launch region:** Global

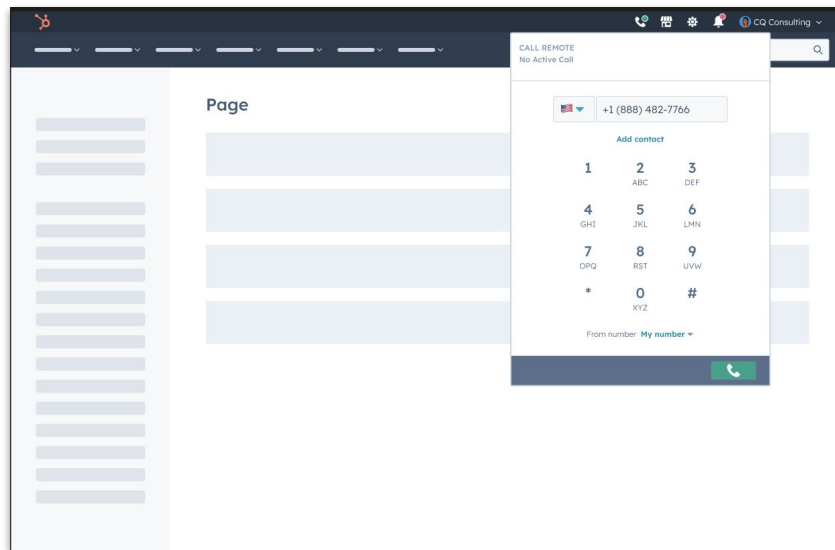
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# Transfer Calls Inbound Calls in Inbox & Help Desk

[Learn More](#)

If you are assigned to the same calling channel in Inbox or Help Desk, you can now easily transfer inbound calls to each other.

## Use Case

Enhance your call management by seamlessly transferring inbound calls within the same calling channel in Help Desk or Inbox. Simply put the caller on hold, choose an available rep from the list, and initiate the transfer. The new rep can then pick up where you left off, ensuring a smooth and efficient customer experience. Transfers are available for inbound calls only and within the same phone number channel, streamlining your support process.

**Launch region:** Global

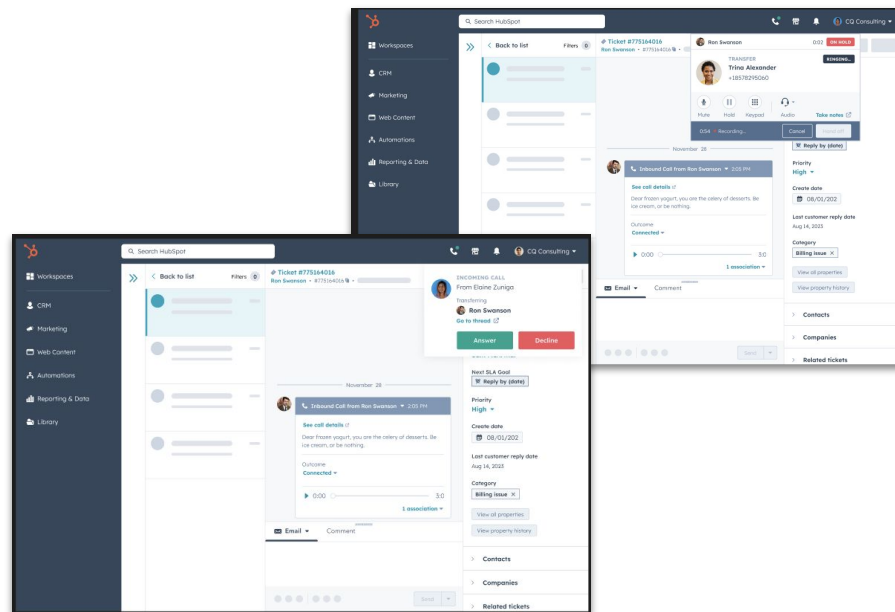
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# Dynamic Sequences

[Learn More](#)

Dynamic sequences introduce a new automated approach that prioritizes manual tasks only for contacts engaging with your initial outreach, allowing for more personalized interactions. This feature transforms traditional sequencing from a static model into a more adaptive one.

## Use Case

By using dynamic sequences, you can automate personalized emails and focus your manual outreach efforts on engaged contacts, ensuring that your sales team spends time on prospects most likely to convert. This not only boosts efficiency but also enhances the overall effectiveness of your outreach strategy.

**Launch region:** Global

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The screenshot displays the HubSpot interface for creating a new dynamic sequence. On the left, there are three options: 'Create a dynamic sequence' (marked as new), 'Start from scratch', and 'Start with a pre-made sequence'. The 'Start with a pre-made sequence' section includes three templates: 'Recent Conversion', 'Event Follow-Up', and 'Start with a pre-made sequence'. On the right, the 'New Dynamic Sequence' editor shows a flow diagram. It starts with 'Leads will receive automated steps until they engage', followed by a list of tasks: 'Automated Email', 'Call Task', 'LinkedIn Connect Task', 'Manual Email Task', and 'Call Task'. A second box indicates 'As soon as leads engage, the sequence will start to queue up manual steps'.

# AI Assistant | Suggested next actions post call

This update enhances call summaries by providing AI-generated suggested next steps for reps to take after a call, based on the conversation context. Suggested actions may include booking a meeting or sending a follow-up email, and reps can also launch ChatSpot for further inquiries.

## Use Case

After a call, you can quickly see tailored recommendations on what to do next, saving you time on deciding your follow-up actions. This feature streamlines your workflow, allowing you to focus on what matters most—engaging with your prospects and customers effectively.

**Launch region:** Global

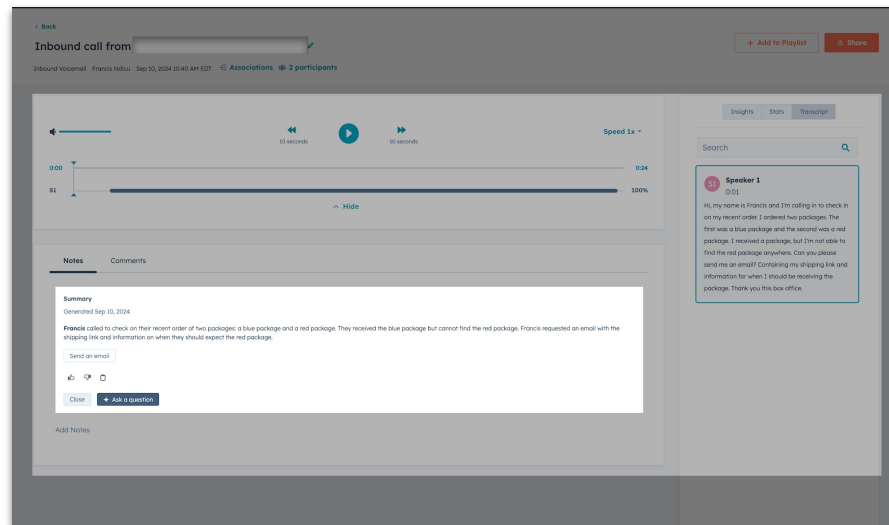
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# Set default columns for forecasting deal table

You can now configure the default columns displayed in the forecasting deal table for individual reps, ensuring that relevant information is prioritized.

## Use Case

This feature streamlines your sales team's viewing experience, fostering more productive 1:1 conversations between reps and managers. By eliminating clutter and ensuring consistency, you can save time and reduce the need for extensive setup guidance, allowing your reps to focus on updating deal information efficiently.

**Launch region:** Global

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**Sales Forecast** -  
Measured by: Close Date and Amount [Give feedback](#)

Deal stage: Forecast category Pipeline: Sales Pipeline Close Date: This month

NAME	GOAL ATTAINMENT	TOTAL PIPELINE	COVERAGE	PIPELINE	BEST	FORECAST SUB.
Emma Wilson	<div style="width: 88%;"><span>88%</span></div> \$7,500.00 of \$8,500.00	\$19,650.00	2.5x	\$8,190.00 2 deals	\$1	\$8,800.00

Deal stage: 3 stages selected

<input type="checkbox"/>	DEAL NAME	AMOUNT	WEIGHTED AMOUNT	DEAL STAGE	FORECAST CATEGORY	NEXT STEP
<input type="checkbox"/>	DeegCo Deal	\$1,100.00	\$990.00	Pipeline (Sales Pipeline)	Pipeline	Call Joe back ASAP
<input type="checkbox"/>	Services Deal Phase 1	\$1,300.00	\$650.00	Best Case (Sales Pipeline)	Best case	Identify primary POC
<input type="checkbox"/>	Real Hannover Estate	\$1,400.00	\$840.00	Commit (Sales Pipeline)	Commit	Send pricing info
<input type="checkbox"/>	HyperX Estate Professionals	\$1,600.00	\$800.00	Best Case (Sales Pipeline)	Best case	Waiting on reply from Tanya
<input type="checkbox"/>	New York Apartments Ltd.	\$2,750.00	\$1,650.00	Commit (Sales Pipeline)	Commit	Schedule final meeting
<input type="checkbox"/>	Gallway Housing	\$8,000.00	\$7,200.00	Pipeline (Sales Pipeline)	Pipeline	Send comparison to compet...



# Operations Hub<sup>®</sup>



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# Undo Reject in Duplicate Management Tool

You can now undo the rejection of a surfaced duplicate pair in the Duplicate Management Tool.

## Use Case

HubSpot's duplicate management tool helps identify and resolve duplicate records in your database, allowing you to reject incorrect suggestions. With the new feature, you can easily undo mistaken rejections, ensuring your data remains accurate and reliable.

**Launch region:** Global

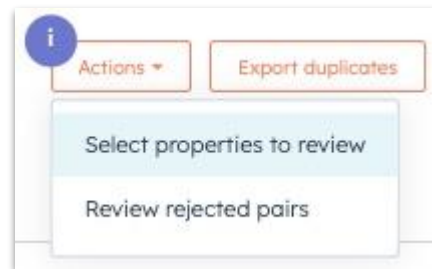
Free



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Public Beta



Rejected duplicate pairs				✕
<p>Rejected duplicate pairs are stored for 14 days. If any updates have been applied to either record from a pair since it was rejected, it'll no longer appear in this list. Undoing a rejection will bring that pair back into the Manage duplicates table.</p>				
CONTACT 1	CONTACT 2	REJECTED AT	ACTIONS	
 <b>Amelia Hernandez</b> amelia.hernandez.1653400730875@gmail-	 <b>Amelia Hernandez</b> amelia.hernandez.1639067501268@gmail-	Aug 26, 2024	<a href="#">Review</a> <a href="#">Undo</a>	



## Data Quality Demo Mode

Introducing the Data Quality Demo Mode in HubSpot. You can now take a guided tour through your data management tools, including data monitoring, duplicate management, formatting issue detection, and property insights.

### Use Case

Your HubSpot account has a lot of useful features — it can be hard to keep track. This new interactive walkthrough helps you understand the data quality tools in HubSpot quickly and easily, so you can use them to clean and curate your data.

**Launch region:** Global

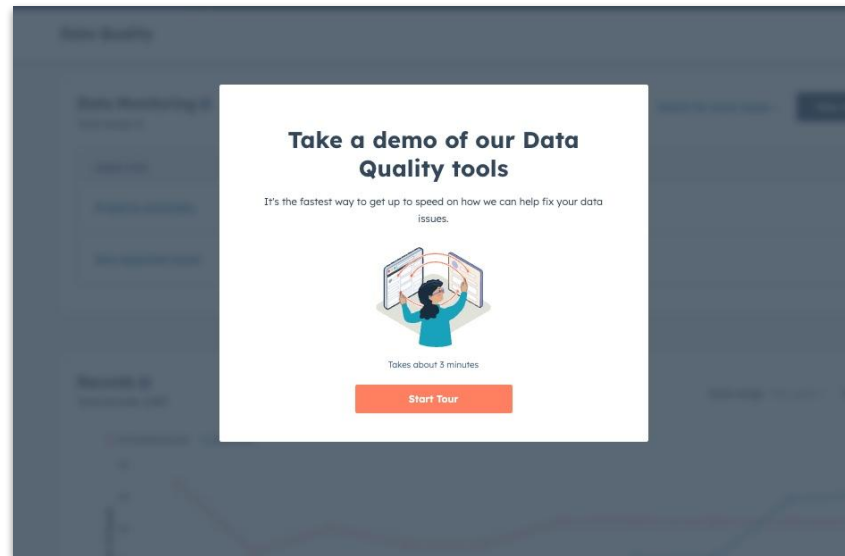
Free

Starter

Pro

Enterprise

Live







# Workflows Conversion Reporting

[Learn More](#)

The workflow editor now shows aggregate conversion and performance data, which is visualized directly on each workflow's diagram.

## Use Case

These new insights empower you with data to help you understand the effectiveness and impact of your workflows. Gaining an understanding of your workflows' performance will, ultimately, help you optimize your automation strategies and improve your business outcomes tied to automation.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Live



# Merges with Property Control in Duplicate Management Tool

You can now select which properties will be retained on the final record when merging duplicate records, giving you unprecedented control over your data consolidation process.

## Use Case

When merging duplicates, you can select the most relevant properties to retain, ensuring that critical information is preserved. This flexibility helps maintain data integrity and aligns the merge process with your organization's specific needs.

**Launch region:** Global

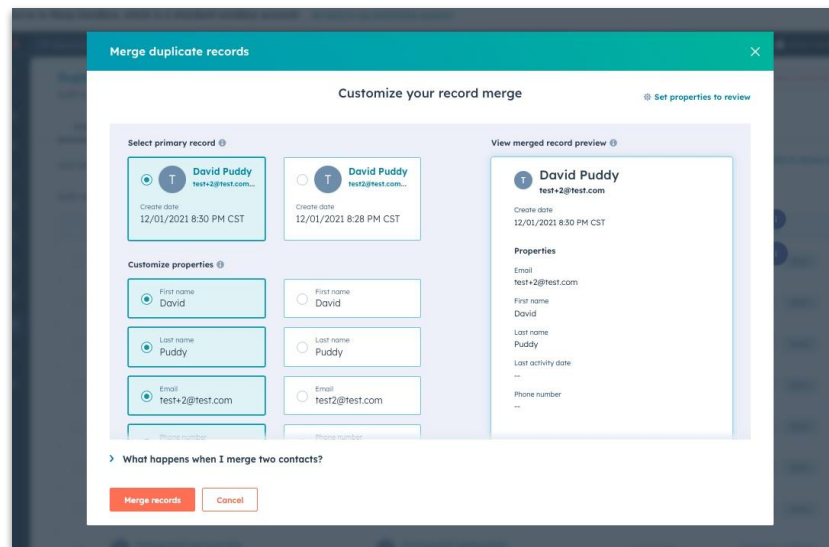
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Enterprise

Public Beta





# Datasets moving to Operations Hub Professional and the Professional Platform

HubSpot is expanding access to datasets, its data preparation and curation tool, now available in Operations Hub Professional.

## Use Case

Datasets empower users to transform data for more effective reporting and create streamlined templates for building reports, saving time and enhancing accuracy. By making these tools more widely available, HubSpot enables customers to unlock better insights and improve their reporting experience, driving informed decision-making across teams.

**Launch region:** Global

Free

Starter

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Enterprise

Live



# Access HubSpot data in AWS S3

You can now access their HubSpot data as a daily upload in their AWS S3 bucket.

## Use Case

With your HubSpot data readily accessible in S3, you can seamlessly integrate it with other tools and data sources, unlocking valuable insights across your entire ecosystem. This enhances your ability to make informed decisions and drive your business forward with a comprehensive view of your data.

Note: The user setting up the S3 sync does need to either have access to S3 admin role at or may need to collaborate with their data admin team.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta



# Access HubSpot data in Google BigQuery

You can now receive daily uploads of your HubSpot data directly into Google BigQuery, enhancing your data accessibility.

## Use Case

With HubSpot data in BigQuery, you can easily integrate it with other data sources, unlocking powerful insights that drive informed decision-making. This flexibility empowers your business to connect and analyze data across platforms, maximizing your strategic potential.

Note: This integration needs information that may require collaborating with your Google BigQuery admin.

**Launch region:** Global

Free

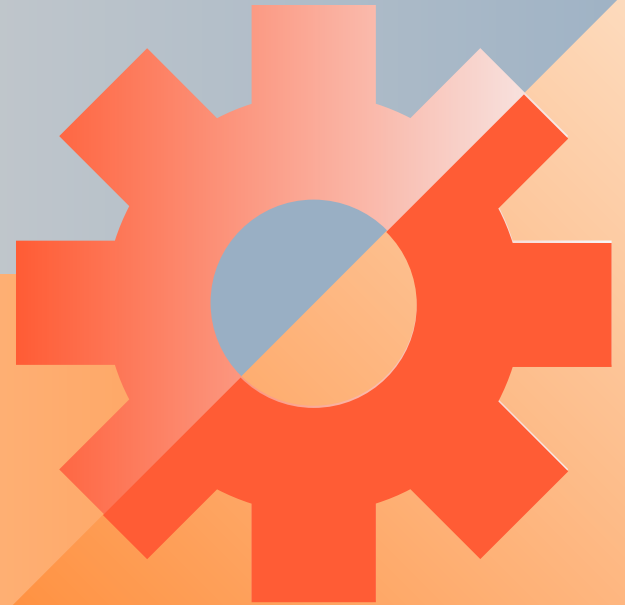
Starter

Pro

Enterprise

Public Beta

# Developer Platform





## Custom Channels API

[Learn More](#)

The Custom Channels API allows developers and partners to integrate any text-based, two-way messaging channel into HubSpot's Help Desk and Inbox workspaces. This means channels like LINE, Telegram, WeChat, and more can function similarly to HubSpot's existing integrations, enhancing your communication capabilities.

### Use Case

With the ability to connect niche or proprietary messaging platforms, you can provide truly omni-channel customer service tailored to your customers' preferences. This integration enables your support team to manage all communications from a single platform, ensuring a seamless experience backed by a comprehensive view of customer interactions.

**Launch region:** Global

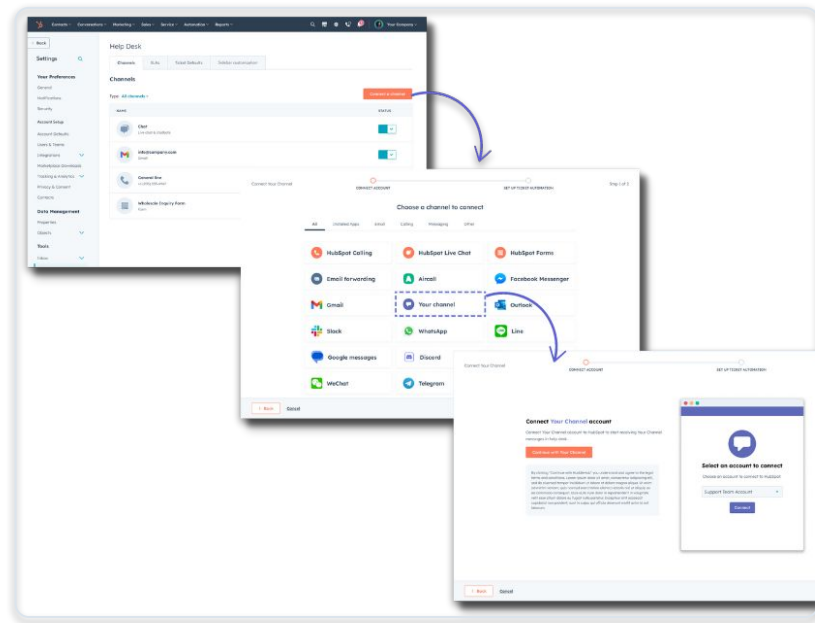
Free

Starter

Pro

Enterprise

Public Beta





## Developer Permission Template

The new 'Developer' permission template is now available in Starter+ portals, allowing admins to easily grant users access to essential developer tools without needing Super Admin privileges.

### Use Case

This update streamlines the process for granting developers the necessary permissions, ensuring they have the right tools to work efficiently. Admins can quickly apply the 'Developer' template while still retaining the flexibility to adjust permissions as needed.

**Launch region:** Global

Free

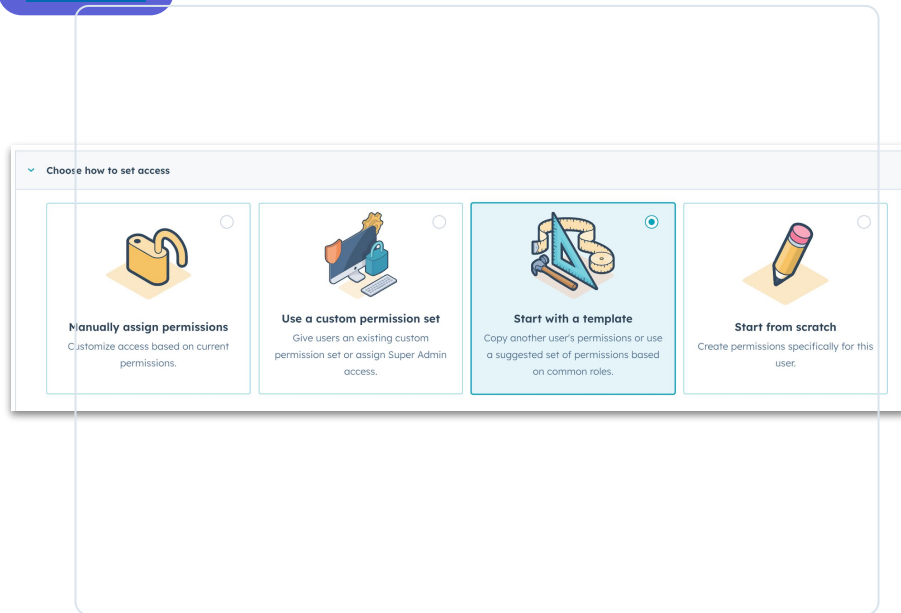
Starter

Pro

Enterprise

Public Beta

[Learn More](#)







## New Developer Permission Set

A new permission toggle allows admins to customize access for developers to HubSpot CRM development tools, including projects, private apps, sandboxes, and the developer home space with in-app documentation.

### Use Case

Previously, developers often required Super Admin access to use these tools, which posed security risks. This update provides admins with greater control, enabling them to grant necessary access without compromising the overall security of the HubSpot instance.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta

[Learn More](#)

#### Developer tools access

Let users access the developer home space, onboarding, and tools to create and manage developer projects, apps, personal access keys, and developer sandboxes.

ON



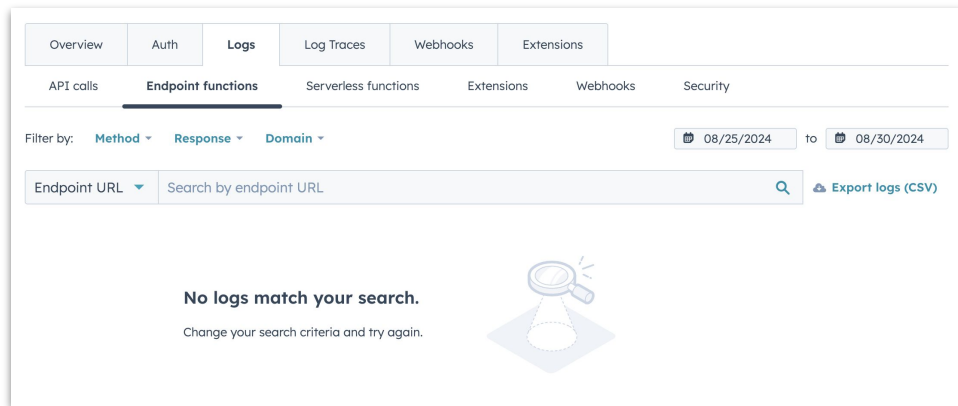


# Serverless Endpoint Function Logs

Private app developers can now access log information for requests made to their serverless endpoint functions through a new sub-tab in the App details UI. This feature allows you to filter logs by Method, Domain, and HTTP status response code, and export the results as a CSV file for deeper analysis.

## Use Case

With this enhanced logging capability, you can easily track and analyze requests to your serverless functions, improving troubleshooting and performance monitoring. This insight allows you to optimize your private apps more effectively, ensuring they run smoothly and efficiently.



**Launch region:** Global

Free

Starter

Pro

Enterprise

Live



# Meetings API

The Meetings API now empowers partners and developers to seamlessly integrate HubSpot meeting links into third-party tools, allowing for quick access without the hassle of switching between systems. This means you can save valuable time and enhance collaboration by having your meeting links right where you need them.

### Use Case

Imagine effortlessly sharing HubSpot meeting links within your favorite collaboration tools like Slack or Asana, streamlining your scheduling process. With just a click, you can pull in the relevant link, keeping your team connected and focused on what matters most—closing deals and driving results.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta



# Sequences API

[Learn More](#)

The new Sequences API enables partners and developers to integrate HubSpot Sequences directly into third-party tools, allowing you to enroll customers seamlessly without switching platforms. This integration enhances efficiency, saving you time and effort while streamlining your outreach process.

### Use Case

Picture enrolling a customer into a follow-up sequence directly from your CRM or project management tool, leveraging existing data without the hassle of toggling between applications. With the Sequences API, you can ensure timely and personalized communication, helping you close deals faster and maintain strong customer relationships.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta

# API Limit Increase & Capacity Pack Changes

API limits for Pro+ customers are being increased, enhancing reliability and scalability of the HubSpot platform. This update raises daily call limits and burst limits, allowing for better data integration and performance.

### Use Case

As the HubSpot ecosystem has evolved, many users now require higher data and integration capacities. By increasing API limits, HubSpot empowers customers to handle larger volumes of data and more complex integrations, ensuring they can fully leverage the platform's capabilities to drive business success.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Live

#### Daily call limits:

- Free & Starter: 250k (*no change*)
- Pro: 500k --> 650k
- Enterprise: 500k --> 1M
- Capacity Pack: 1M total --> additional +1 million on top of the base subscription limit.

#### Burst limits - # of requests per 10 seconds:

- Free & Starter: 100 requests per 10 seconds (*no change*)
- Pro: 150 requests per 10 seconds --> 190 per 10 seconds
- Enterprise: 150 requests per 10 seconds --> 190 per 10 seconds

#### CRM Search API:

- 4 requests per second per authentication token --> 5 requests per second per authentication token
- 100 records per page request --> 200 records per page request

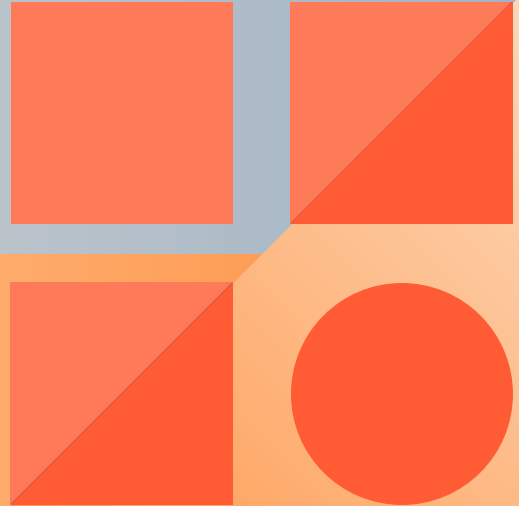
#### Dev Burst (public app):

- 100 per 10 seconds --> 110 per 10 seconds

#### Associations API will keep the previous limits:

- Daily:
  - Pro: 500k
  - Enterprise: 500k
  - Capacity Pack: 1M total
- Burst:
  - Free / Starter: 100 requests per 10 seconds
  - Pro: 150 per 10 seconds
  - Ent: 150 per 10 seconds
  - Capacity Pack: 200 per 10 seconds

# App Marketplace



# App Marketplace

## 95+ new and 35+ updated apps in HubSpot's App Marketplace

Over 95 new apps have joined [HubSpot's App Marketplace](#), including powerful tools like [Adobe Express](#) and [HeyGen](#), alongside [35+ updated apps](#) featuring enhanced functionalities.

### Use Case

With over 1,700 apps now available, HubSpot's App Marketplace empowers you to seamlessly integrate new capabilities into your workflows. These updates enable your teams to optimize operations, enhance collaboration, and drive growth more effectively.

**Launch region:** Global

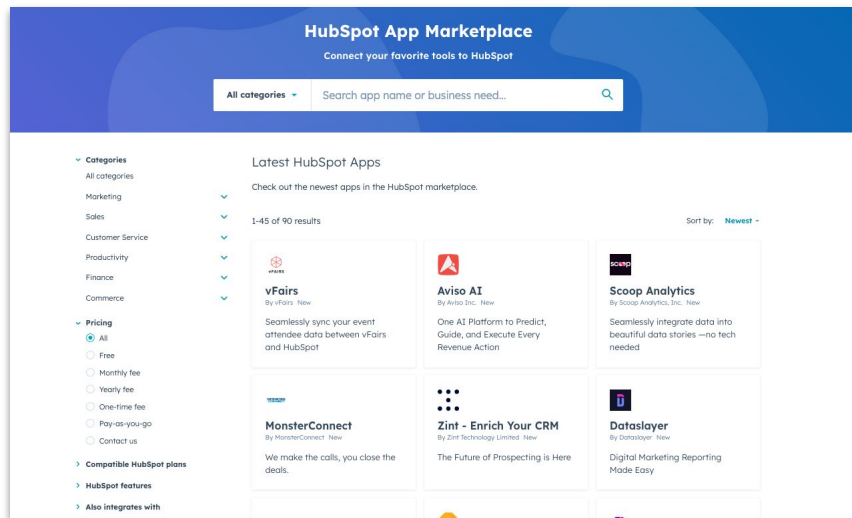
Free

Starter

Pro

Enterprise

Live



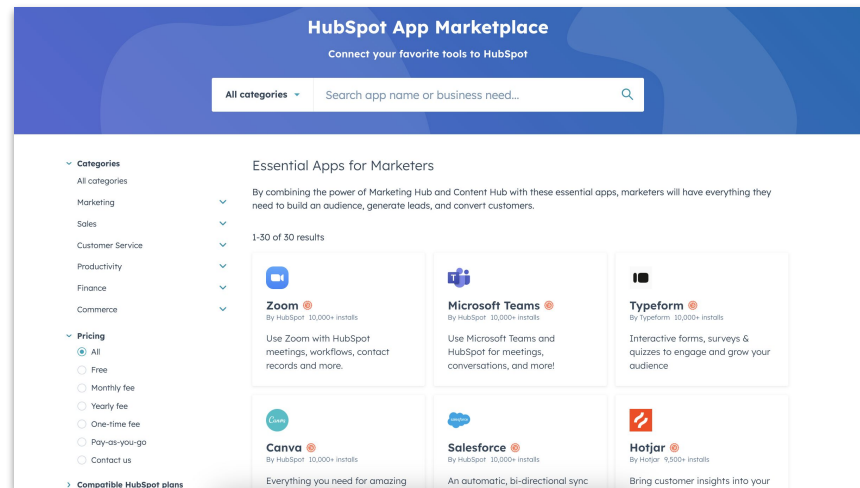
## Essential Apps for Marketers (Content Hub & Marketing Hub)

Discover an updated collection of essential marketing apps in the HubSpot App Marketplace, featuring tools like Adobe Express for creating stunning visuals and Amplitude for enriching your CRM data with product insights.

### Use Case

With the new essential apps in the HubSpot App Marketplace, you can easily integrate tools like Adobe Express and Amplitude into your marketing workflows. This streamlines content creation and personalization, helping your team deliver impactful campaigns that drive conversions.

**Launch region:** Global





# Introducing App Cards Powered by UI Extensions in the App Marketplace

[Learn More](#)

App cards offer a customizable way to display, sync, and interact with data from your third-party tools directly within HubSpot, replacing classic CRM cards with richer experiences.

### Use Case

By integrating app cards, you can streamline workflows, reduce context-switching, and enhance collaboration across your tools, all from one central hub. This empowers your team with actionable insights and tailored features, driving productivity and organizational growth while keeping everything you need at your fingertips.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Live

# New PandaDoc CPQ for HubSpot

The PandaDoc app for HubSpot now features integrated end-to-end CPQ functionalities, allowing you to create accurate quotes and manage your entire sales cycle directly within HubSpot.

### Use Case

Previously, sales teams faced challenges with inconsistent quotes due to switching between HubSpot and PandaDoc, leading to errors. With the new integration, you can streamline document creation, eSignatures, and payments all in one place, enhancing efficiency and accuracy without the need for complex setups or external consultants.

**Launch region:** Global

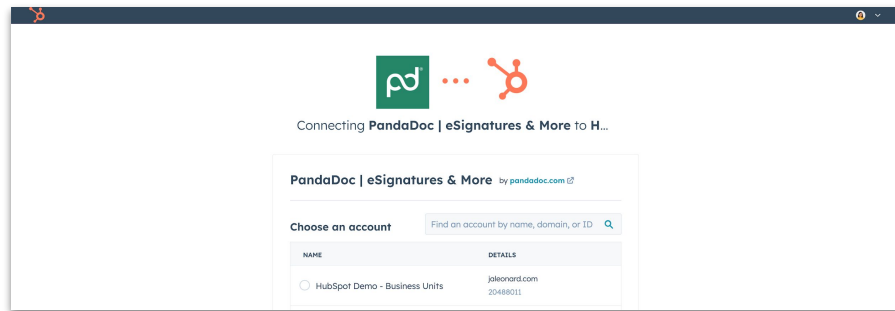
Free

Starter

Pro

Enterprise

Live



## Improvements to the Amplitude app for HubSpot

The Amplitude app for HubSpot now enables GTM teams to leverage product usage insights alongside customer data. Key features include easy sign-up, integrated lead and customer health scoring, embedded reports in HubSpot dashboards, and real-time tracking.

### Use Case

Previously, syncing Amplitude's insights with HubSpot was complex, limiting GTM teams' ability to engage effectively with leads and create targeted campaigns. Now, with seamless integration, marketers can harness product behaviors to identify top leads, while sales and customer success teams can optimize their strategies based on comprehensive customer insights, enhancing overall performance.

**Launch region:** Global

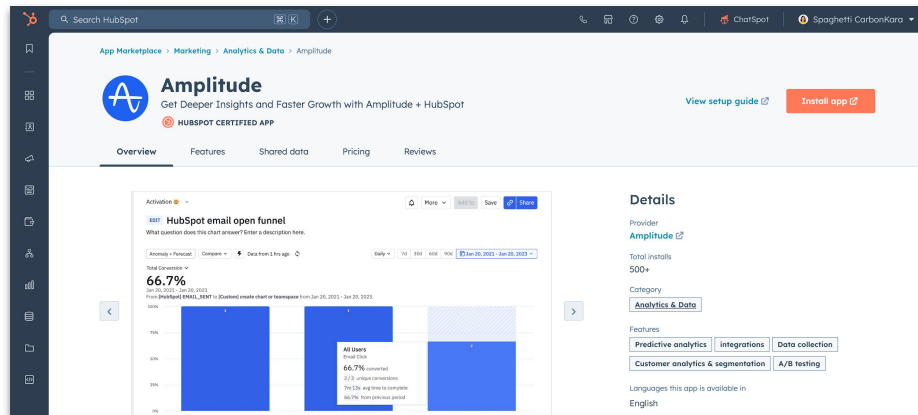
Free

Starter

Pro

Enterprise

Live



# Set up notifications for disconnected apps

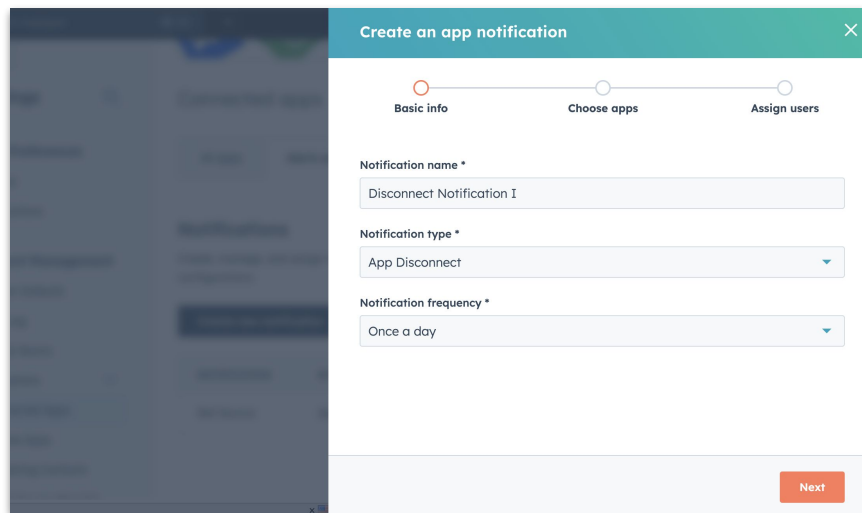
Notifications for disconnected apps can now be set up, allowing you to configure alerts for specific applications and choose who to notify and when.

### Use Case

When a password change causes an app to disconnect, your designated team members will receive instant notifications, eliminating the need for manual checks on the Connected Apps page. This proactive approach ensures that any disconnection is addressed quickly, keeping your HubSpot apps running smoothly.

Note: This feature is currently available only for public apps built by app partners.

**Launch region:** Global



**Create an app notification** ✕

Basic info      Choose apps      Assign users

Notification name \*  
Disconnect Notification I

Notification type \*  
App Disconnect

Notification frequency \*  
Once a day

Next

Free

Starter

Pro

Enterprise

Live



**Smart CRM™**



Powered by Breeze

# Store highly sensitive data in HubSpot Smart CRM

[Learn More](#)

HubSpot Super Admins can now create custom properties for storing highly sensitive information, such as Social Security Numbers or full bank account details. These properties feature click-to-decrypt functionality, strict access restrictions, and enhanced encryption for added security.

## Use Case

This capability enables organizations to maintain a comprehensive and unified customer profile while safely managing sensitive data. With the right permissions, teams across sales, marketing, and service can access and utilize this information to deliver more personalized and effective customer experiences.

**Launch region:** Global

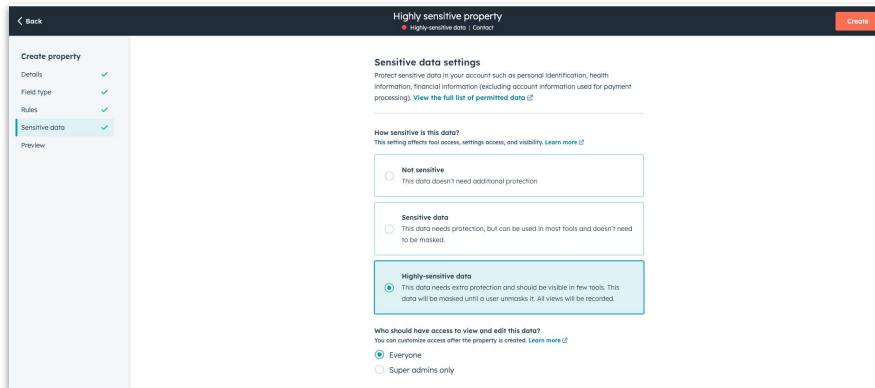
Free

Starter

Pro

Enterprise

Public Beta



Highly sensitive property

Back

Create property

- Details ✓
- Field type ✓
- Rules ✓
- Sensitive data ✓
- Preview

Sensitive data settings

Protect sensitive data in your account such as personal identification, health information, financial information (excluding account information used for payment processing). [View the full list of permitted data.](#)

How sensitive is this data?  
This setting affects tool access, settings scores, and visibility. [Learn more.](#)

Not sensitive  
This data doesn't need additional protection.

Sensitive data  
This data needs protection, but can be used in most tools and doesn't need to be masked.

Highly sensitive data  
This data needs extra protection and should be visible in few tools. This data will be masked until a user unmarks it. All views will be recorded.

Who should have access to view and edit this data?  
You can customize access after the property is created. [Learn more.](#)

Everyone

Super admins only

Create

# Store HIPAA data in HubSpot

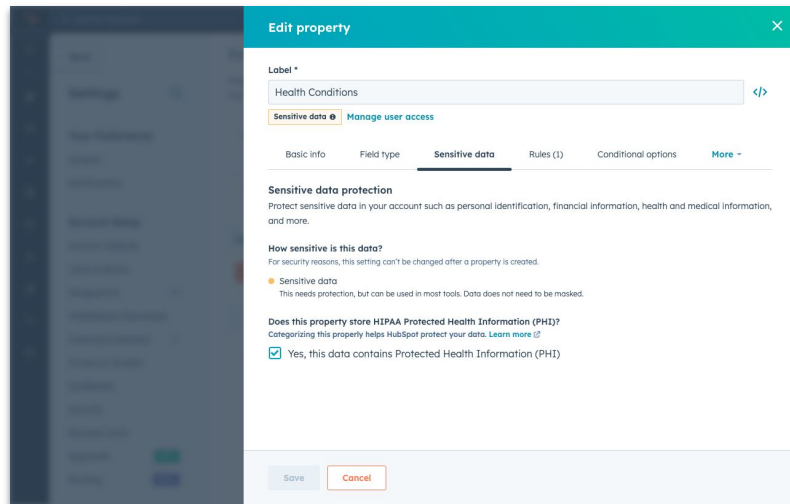
[Learn More](#)

With this update, organizations that are HIPAA covered entities or business associates and need a business associate agreement (BAA), can store personal, protected health information (PHI) in HubSpot and operate their portal in compliance with HIPAA regulations.

## Use Case

The Health Insurance Portability and Accountability Act (HIPAA) ensures the protection of health information for U.S. organizations, and HubSpot offers tools and technical infrastructure to safeguard sensitive health data, enabling you to store and utilize HIPAA information for improved sales and service. By securely storing HIPAA data, you can enhance contact tracking, segmentation, automation, and gain comprehensive insights into customer interactions.

**Launch region:** Global

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

# CRM Data Backup

[Learn More](#)

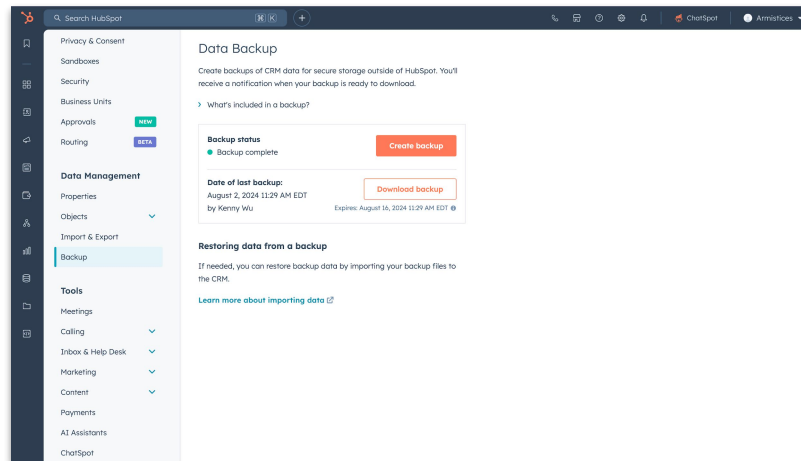
CRM Data Backup introduces an important mechanism to protect your data. You now can take a manual export of all contacts, companies, deals, tickets, custom objects, products, calls, tasks, and conversations in a CSV zip file.

## Use Case

While you could export objects individually, a full data backup option was previously missing. Regular backups now provide business continuity and peace of mind, ensuring you can easily restore your data if integrations or automations make unwanted changes.

Note: Enterprise tier can create a backup every 24 hours, while other tiers can create a weekly backup.

**Launch region:** Global

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



# Smart Content for CTAs

[Learn More](#)

You can now create Smart Content variations for CTAs directly within the new CTA editor, enabling more personalized experiences for your website visitors.

## Use Case

Smart Content in HubSpot has become even more powerful with the new CTA editor, allowing you to create and manage variations of your embedded assets and pop-up CTAs. You can now fine-tune your CTAs' relevance by customizing them for categories like Ad Source, Device Type, and Language.

**Launch region:** Global

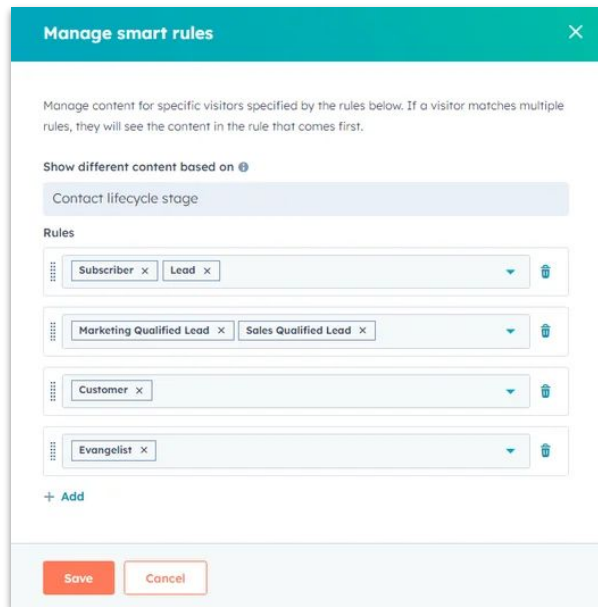
Free

Starter

Pro


Enterprise

Public Beta



**Manage smart rules** ✕

Manage content for specific visitors specified by the rules below. If a visitor matches multiple rules, they will see the content in the rule that comes first.

Show different content based on 

Contact lifecycle stage

**Rules**

- Subscriber x Lead x
- Marketing Qualified Lead x Sales Qualified Lead x
- Customer x
- Evangelist x

+ Add

Save Cancel

# Unsummarized Dataset in Report Viewer

You can now easily see the unsummarized Dataset behind your reports from within the Report Viewer.

## Use Case

Accessing the record level data behind your Reports is critical to help find problems and answer questions, the unsummarized “Dataset” tab makes this as easy as a single click. This view is responsive to your filters and makes it simple to see all the record level data within your Report without needing to Edit or Export.

**Launch region:** Global

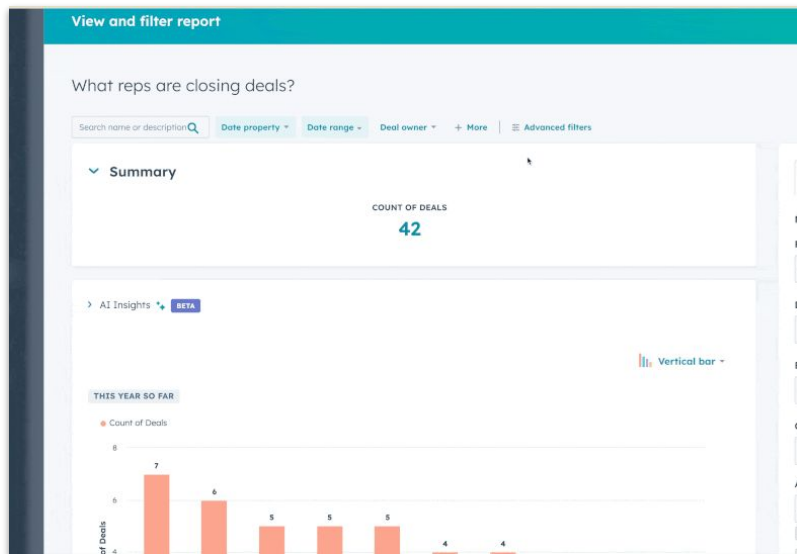
Free

Starter

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Enterprise

Public Beta



# CRM Platform



## Turn-off email notifications from the footer

You can now easily turn off unwanted email notifications directly from the email's footer, eliminating the hassle of navigating to the notifications preferences page.

### Use Case

You often receive irrelevant notifications and may not have time to navigate the preferences page to disable them. Now, you can easily turn off unwanted notifications contextually, simplifying the process and helping you focus on what matters most.

Note: This option is available for user-settable notifications. Non-optional notifications cannot be turned off.

Launch region: Global

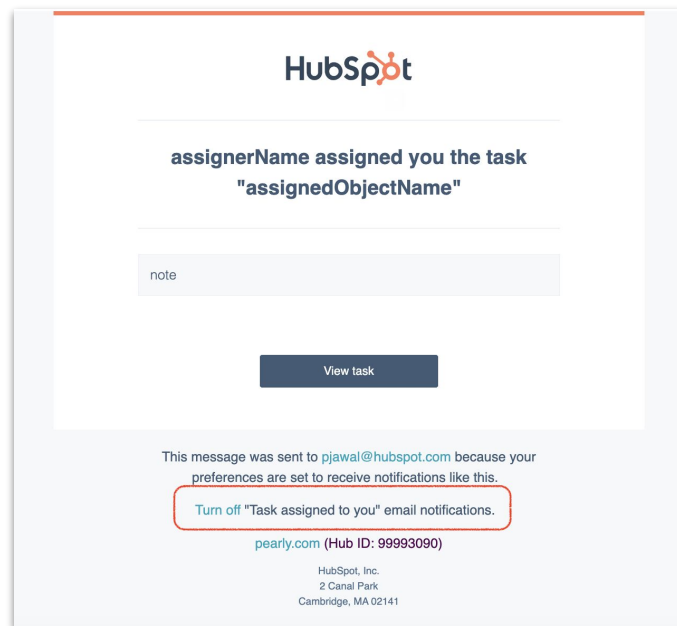
Free

Starter

Pro

Enterprise

Live



# Unsubscribe links on by default for new portals

[Learn More](#)

Starting September 4, all newly created portals will automatically have unsubscribe links enabled in 1:1 emails, ensuring compliance and enhancing your email management.

### Use Case

Adding unsubscribe links to emails is crucial for deliverability, and now, new portals will automatically include this feature to ensure you meet industry standards from the start. This change simplifies your onboarding process and helps you avoid potential issues down the line, setting you up for success right away.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Live

### Unsubscribe links

Configure how unsubscribe links are used in emails sent from the CRM.

**Apply the same unsubscribe link settings for all users**

When this setting is off it will allow each user to set their own unsubscribe settings.

**Include unsubscribe text & link for all users** **RECOMMENDED**

Include a link at the bottom of emails from the CRM allowing recipients to unsubscribe. It will help you stay compliant with local spam laws and improve deliverability.

[Edit unsubscribe link](#)

## Index Settings Tab

You can now access Index Page setup options directly from the Settings pages, making it easier to customize 'All Views' and set default views for your team. Additionally, you can toggle the Deal Insights Card on or off for all Deal Index views.

### Use Case

By centralizing these setup options, you can streamline the onboarding process for new teammates, ensuring they quickly access relevant views without disruption. This enhances your team's efficiency and consistency in managing data across HubSpot.

**Launch region:** Global

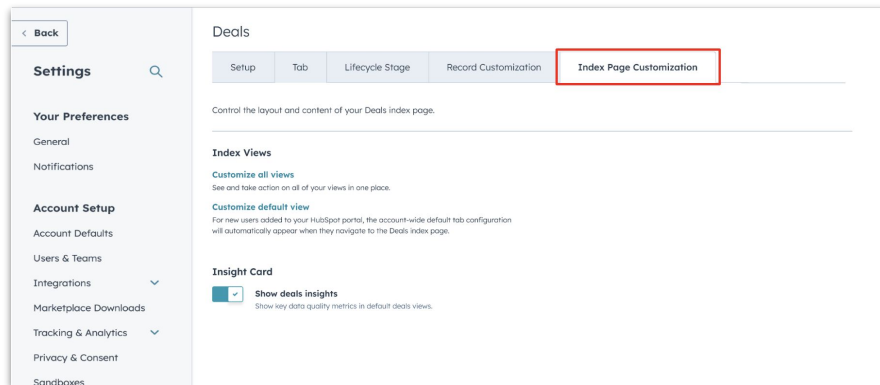
Free

Starter

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Enterprise

Live



## Summarize Contacts Directly from Global Search

When you search for Contacts in Global Search, a new "Summarize" option appears when you hover over each row, providing a quick overview of each contact record powered by ChatSpot.

### Use Case

By using the Summarize button, you can quickly assess contact details and make informed outreach decisions, saving you time and improving your efficiency when connecting with potential leads. This streamlined process helps you engage the right contacts promptly, enhancing your productivity.

Launch region: Global

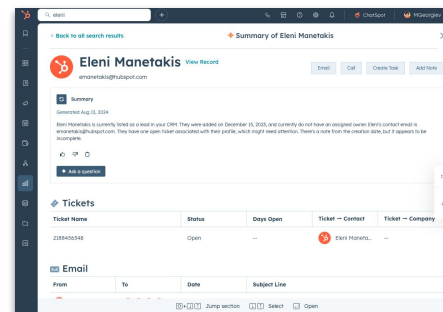
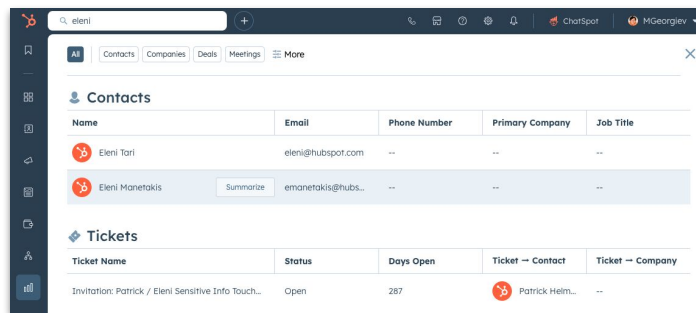
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Starter

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Enterprise

Public Beta



## "Freezing" Multiple Columns

You can now freeze up to three columns in an Index table, enhancing your ability to interact with and analyze your data more easily. This added flexibility allows you to keep important information visible while scrolling through large datasets.

### Use Case

Keeping key metrics or identifiers visible as you navigate through your data makes it simpler to compare information and make informed decisions without losing context. This improvement enhances your efficiency and effectiveness in data management.

**Launch region:** Global

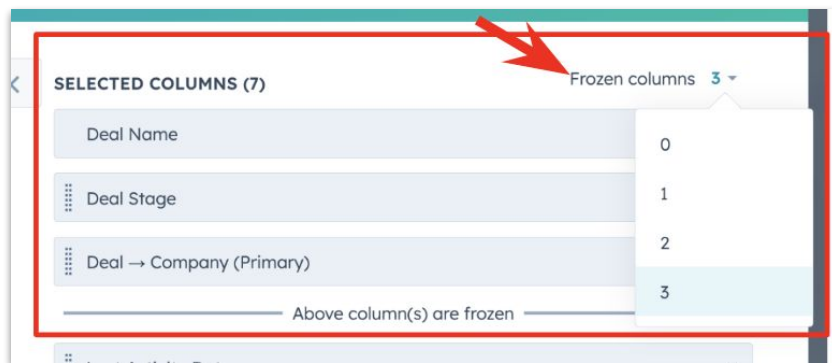
Free

Starter

Pro

Enterprise

Live





# Configure Activity Association Defaults

[Learn More](#)

Admins can now configure default logic for logging activities across contacts, companies, deals, tickets, and custom objects, setting rules based on the original logging location, activity type, and associated records.

### Use Case

By customizing logging rules, you can reduce the occurrence of irrelevant activities appearing on records, saving your reps time and ensuring that logged activities are meaningful and aligned with their workflows. This streamlined process improves efficiency and enhances the overall user experience within your CRM.

**Launch region:** Global

[Free](#)[Starter](#)[Pro](#)[Enterprise](#)[Public Beta](#)

# Associated Record Labels for Objects in CRM Index Page Filters

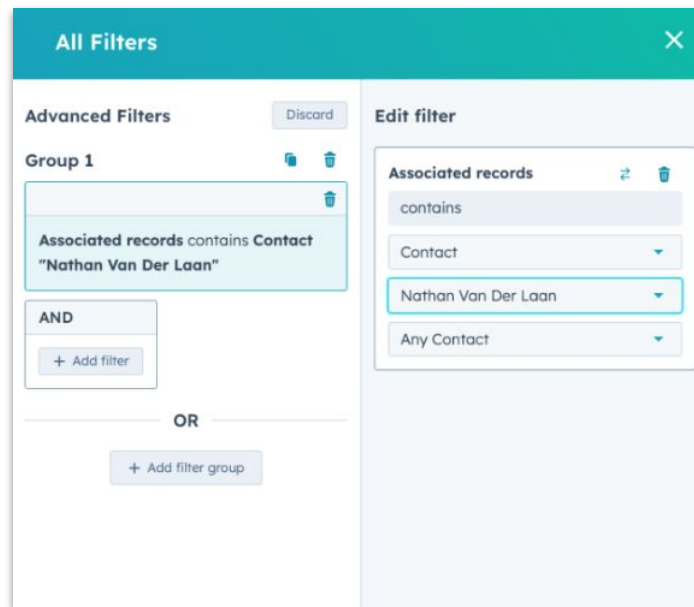
You can now select association labels for associated records while creating filters on the index page, providing clearer insights into how records are connected. This enhancement allows for more precise filtering based on the specific relationships between records.

### Use Case

This added clarity helps you avoid errors in data management by making the connections between records explicit. By leveraging association labels in your filters, you can more effectively analyze and organize information, streamlining your workflow within the CRM.

Note: If you don't choose any label, it defaults to "Any Contact"

**Launch region:** Global



Free

Starter

Pro

Enterprise

Live

## Inline editing on Association tables

Association tables in the middle column of record pages now support inline editing, allowing you to make changes directly within the table. This update enhances your workflow by enabling quicker updates to associated records without needing to navigate to multiple pages.

### Use Case

With inline editing, you can efficiently manage your associated records all in one place, saving time and reducing the complexity of record management. This streamlined process helps you stay organized and enhances your overall productivity within the CRM.

**Launch region:** Global

The screenshot displays a CRM interface for a company profile. On the left, the 'About this company' section for 'Dunder Mifflin' is visible, including details like domain name, LinkedIn page, and annual revenue. The main area shows 'Deal details' with summary statistics: 'FIRST DEAL CREATED DATE' (01/04/2022 10:46 AM PST), 'NUMBER OF OPEN DEALS' (6), and 'ANNUAL REVENUE' (\$250,000,000). Below this is a 'Deals' table with columns for DEAL NAME, AMOUNT, CLOSE DATE (PDT), and DEAL STAGE. The table contains five rows of deal records. At the bottom, there is a 'Top Contacts' section with a search bar and a table listing contacts, including Meredith Palmer.

DEAL NAME	AMOUNT	CLOSE DATE (PDT)	DEAL STAGE
Party supplies	\$50	Aug 2, 2024 9:35 AM PDT	Appointment Scheduled (Sales Pl...
Office supplies - spring	\$55	Mar 31, 2024 9:49 AM PDT	Qualified To Buy (Sales Pipeline)
Dunder Mifflin - New Deal	\$750	Today at 2:11 PM	Contract Sent (Sales Pipeline)
Penobscott County - New Deal	\$25	Mar 31, 2023 10:29 AM PDT	Contract Sent (Sales Pipeline)
Paper purchase	\$50	Aug 1, 2024 4:24 PM PDT	Contract Sent (Sales Pipeline)

Free

Starter

Pro

Enterprise

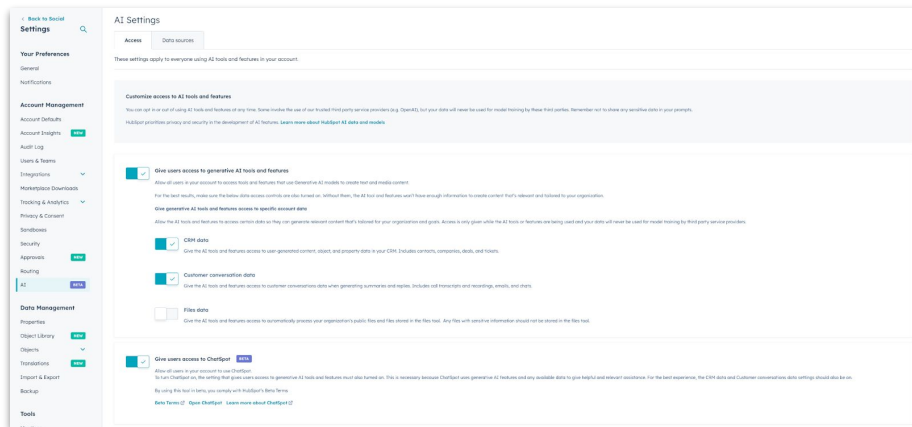
Live

## Upcoming changes to AI settings

A centralized "AI" settings page will be introduced, allowing you to manage your organization's access to Generative AI features and control the types of data these features can utilize. This new page will replace the existing "AI Assistants" and "ChatSpot" settings.

### Use Case

With this updated settings page, you gain enhanced control over how your organization's data is used by Generative AI, ensuring that you can tailor its functionality to meet your specific needs. This streamlining not only simplifies management but also helps you leverage HubSpot's AI capabilities more effectively.



**Launch region:** Global

Free

Starter

Pro

Enterprise

Live

# Expand your data model: new objects and data templates

The new Object Library and Data Templates expand your CRM setup by providing pre-built objects and templates tailored for industries like Real Estate, Education, and Healthcare. These templates include new objects, recommended custom properties, association labels, and pipeline stages, allowing for immediate use and seamless integration with HubSpot tools.

### Use Case

By utilizing these industry-specific templates, you can quickly customize your CRM to fit your business needs without the time-consuming process of building from scratch. This not only streamlines your setup but also ensures your team can start working efficiently right away, enhancing overall productivity and data management.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Live

# Property date tracker

The property date tracker now displays the progress of date-based properties as a middle column card, providing a clear visual representation of key dates.

### Use Case

This card allows you to quickly monitor upcoming deadlines, making it easier to assess progress and determine necessary actions for activities like contract renewals. With a clear view of start dates, end dates, and the current date, you can stay on top of critical timelines and ensure timely follow-ups.



**Launch region:** Global

Free

Starter

Pro

Enterprise

Live

# Required Association Labels for Manual Record Creation

Admins can now enforce the use of association labels during the creation of contact, company, deal, ticket, or custom object forms by requiring either any label or a specific label (e.g., "primary buyer"). This ensures that reps must fill out all required information, including labels, before creating a new record.

### Use Case

By implementing this functionality, you can enhance data quality and ensure that important association labels are consistently applied during record creation. For example, if every deal must have an associated contact labeled as "primary buyer," this requirement helps streamline the process, making it easier for your team to maintain accurate and organized data.

**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta

**Create deal** [Close]

**Associate deal with**

▼ Companies

Associate Company

Search

Association label \* ⓘ

Primary

Add timeline activity from this company ⓘ

▼ Contacts

Associate Contact \*

Search

Association label \*

Primary Buyer

Add timeline activity from this contact ⓘ

+ Associate more Contacts

# Admins editing filters for "unowned" Index Views

Admins can now modify and save filters or columns across any view, rather than being restricted to only the views they created. This update enhances flexibility and usability for managing data.

### Use Case

With the ability to adjust filters and columns across all views, you can ensure that your team has access to the most relevant data and insights. This streamlines data management and helps improve overall efficiency in your reporting processes.

**Launch region:** Global

Free

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Enterprise

Public Beta

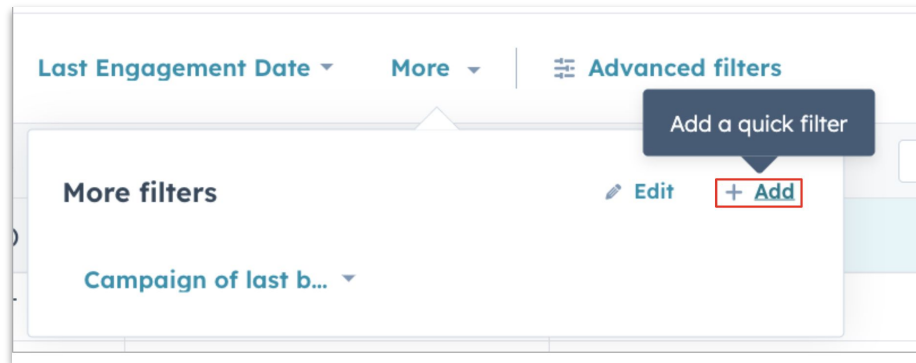


# Customizable Quick Filters for Index Pages

This update allows you to create and save custom quick filters for contact, company, deal, ticket, and custom object views, enhancing your data management capabilities.

### Use Case

By saving custom quick filters, you can easily access the most relevant data for your needs in future sessions, allowing you to gain insights faster and focus on what matters most without having to reapply filters each time.



**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta

# Navigation UI Update

The global navigation UI has been enhanced to improve efficiency and usability by reducing clicks, decreasing mouse movement, and adjusting sensitivity to prevent accidental openings.

### Use Case

These updates allow you to navigate HubSpot more smoothly, enabling you to access tools and information faster without the frustration of accidental triggers. For example, you can quickly find what you need with fewer clicks, making your workflow more efficient and enjoyable.

**Launch region:** Global

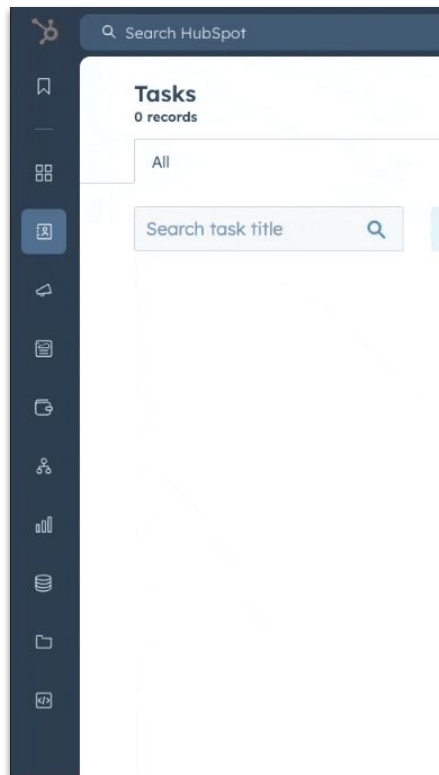
Free

Starter

Pro

Enterprise

Live



## Quick actions card

You can now customize the quick actions card, giving your team easy access to essential tasks like adding notes, creating tasks, and making new associations. This streamlined feature enhances user experience by placing critical actions at your fingertips.

### Use Case

When managing numerous contacts, you can quickly update properties and capture notes without navigating away from the main dashboard. This efficiency allows you to focus on closing deals and maintaining relationships, ultimately boosting your productivity.

**Launch region:** Global

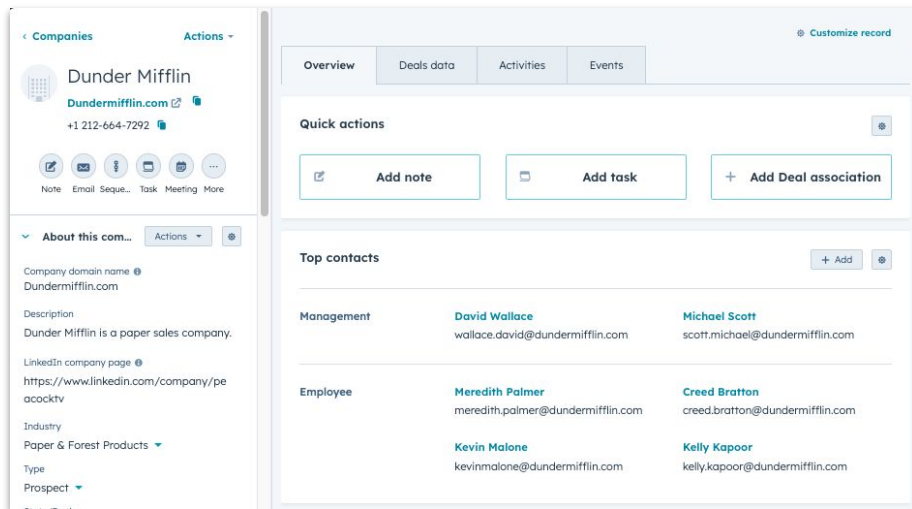
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## Recommended Product Updates

You can now access a curated list of product updates tailored to your team's usage of HubSpot.

### Use Case

With over 800 updates released in the past year, this feature helps you easily identify the most relevant changes that can enhance your workflows. By focusing on impactful updates, you can effectively manage change and optimize your team's performance within HubSpot.

Launch region: Global

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**Recommended for you**  
Discover product updates and upcoming releases tailored to [your team's usage of HubSpot](#).

Search recommended  **All impact** **All apps** **All products** **All statuses**

UPDATE	RELEASE IMPACT	PRODUCTS	LAST UPDATED
<b>User Out of Office for Inbox and Help desk</b> ● Live	Medium	Sales, Service Routing and Assignment   User Preferences   Help Desk   Inbox	July 23, 2024
<b>Add data to users with custom user propert...</b> ● Public Beta - Not taking part in beta	Low	Sales, Service CRM   Account Settings	June 14, 2024 <a href="#">Join Beta</a>
<b>Predictive Deal Score</b> ● Public Beta - Not taking part in beta	Low	Sales Deals	April 9, 2024 <a href="#">Join Beta</a>

## Orders and Cart object Enhancements

New features for carts and orders in HubSpot include record pages for these objects, association cards to view related orders and carts on record pages like deals and contacts, and enhanced object data management accessible from the settings tab.

### Use Case

Previously, orders and carts lacked parity with other CRM objects, limiting ecommerce data management. These improvements now enhance data management, allowing you to integrate order and cart data into marketing campaigns and reports.

**Launch region:** Global

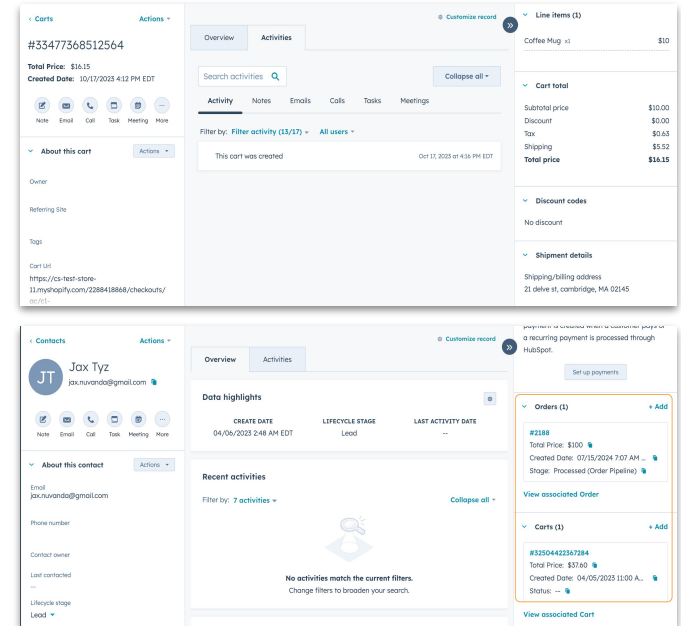
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## Search & Filter Duplicate Records

Our duplicate management tool now features advanced search and filtering options, allowing you to target duplicates by attributes like contact owner, lifecycle stage, and company creation date. These enhancements streamline data cleansing and make it easier to find specific records quickly.

### Use Case

The new search and filtering features transform duplicate management, allowing you to quickly focus on the most relevant duplicates. This boost in efficiency and accuracy saves time, enhances data quality, and optimizes workflows for better decision-making and productivity.

**Launch region:** Global

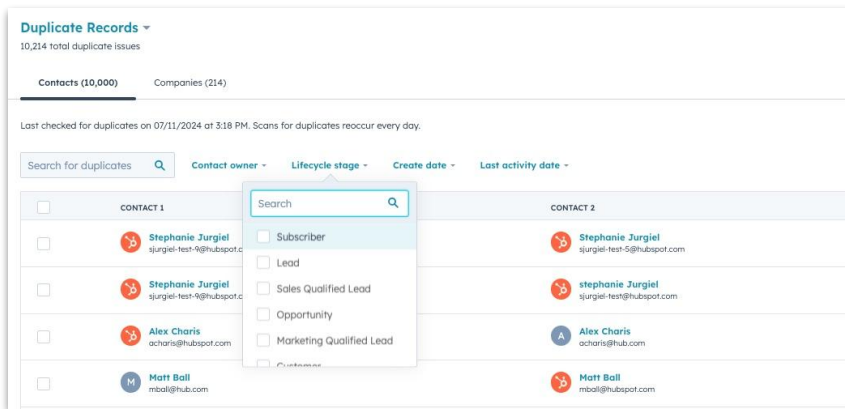
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 AI Powered



# Social Media Agent

Produces effective social posts tailored to your business, audience, brand voice, and social media accounts.

## Use Case

Content creation is a crucial part of a social marketer's daily tasks. The Breeze Social Media Agent saves time and resources by producing consistent, quality social content that engages the audience.

Launch region: Global

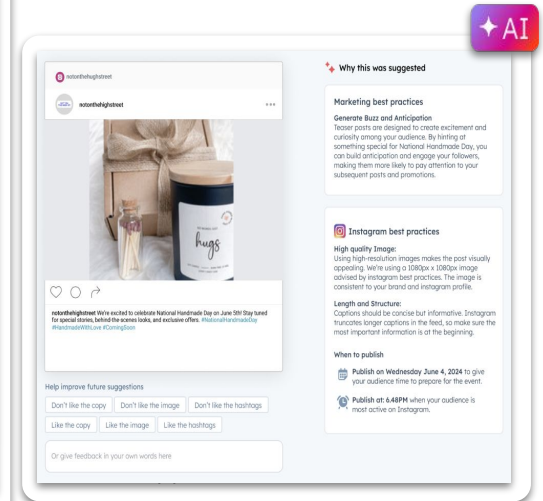
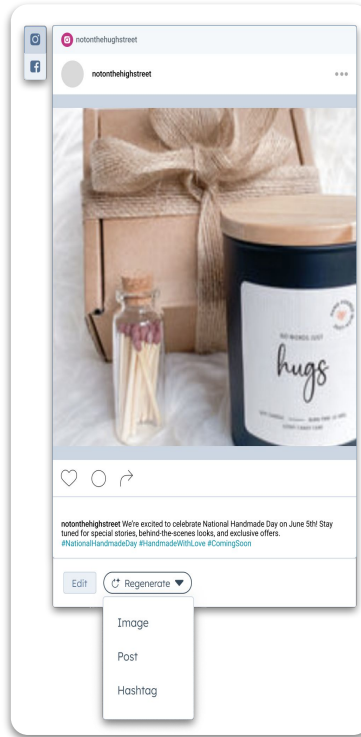
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Enterprise

Private Beta





# Prospecting Agent

[Learn More](#)

Engages your leads for you by researching and personalizing comms, and automating the outreach process - either review and approve before it begins, or let it run on its own.

## Use Case

Enroll companies and contacts in your CRM to the prospecting agent. The agent can then research each company and contact to develop an understanding of your business and needs. It saves time and works 24/7 to drive pipeline with engaged leads for sales.

Launch region: Global

Free

Starter

Pro

Enterprise

Private Beta

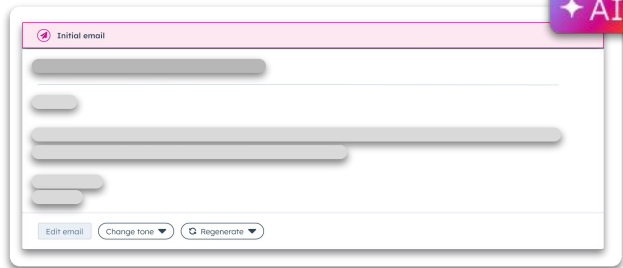


## Re-engage previous leads

The agent will find leads who stopped engaging, then compose and send personalized outreach.

[Re-engage previous leads](#)

AI



# Copilot

[Learn More](#)

Breeze Copilot (formerly ChatSpot) is a powerful AI chat assistant that works with users to get things done in HubSpot. With Copilot, users can gain insights on prospects, generate content across all their marketing channels, prepare for upcoming customer meetings, and talk to the data in their CRM.

## Use Case

Copilot helps all users work more efficiently by giving them a smart assistant that knows about everything in their portal and can quickly accomplish basic tasks across HubSpot.

**Launch region:** Global

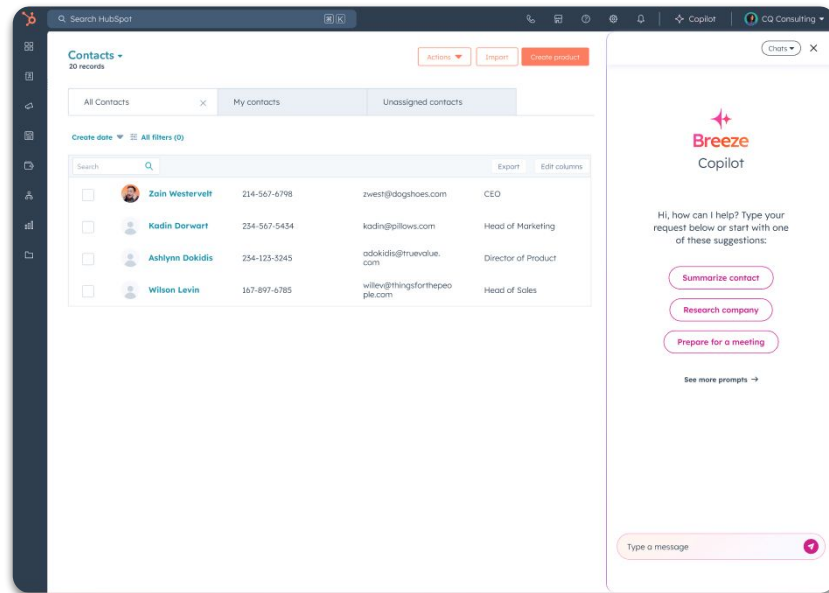
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Public Beta





# Content Agent

[Learn More](#)

Generates high-quality content for you using your existing content, brand voice, and CRM - taking you through a guided flow.

## Use Case

Content marketing is more important than ever. However, 50% of B2B marketers report that creating high-quality content consistently is challenging and resource-intensive. The content agent streamlines the creation of high-quality content, saving time and effort.

Launch region: Global

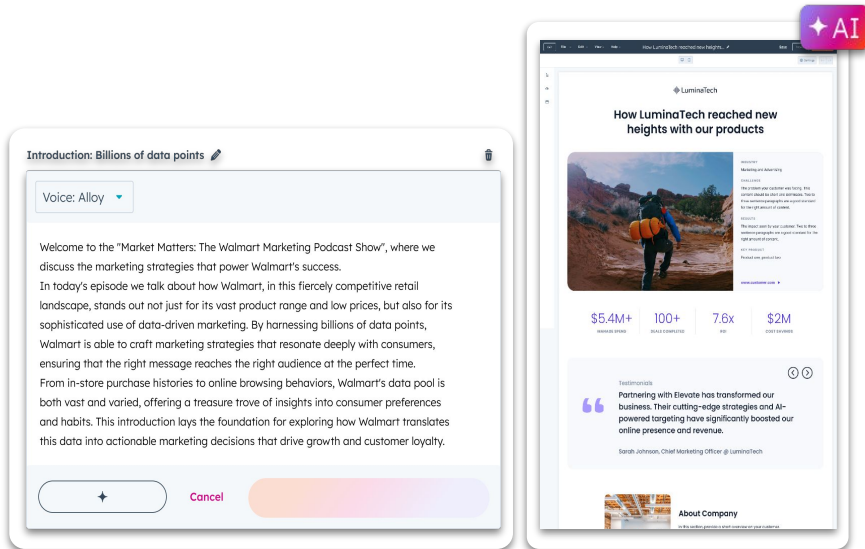
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# Customer Agent

[Learn More](#)

Train your agent using your approved content to then instantly resolve customer questions for you.

## Use Case

Through an AI Chatbot, businesses can now deliver personalized responses to their visitors within minutes. It helps resolve issues quickly, scale support, and increase customer satisfaction.

Launch region: Global

Free

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Enterprise

Live

### Conversations Deflected

Number of conversations deflected by the agent over time, showing how effectively it reduces the workload on human agents.



### Provide the content Luma needs to be successful

To provide accurate and relevant information, your agent needs access to data sources. **You need at least one source, you can add more later.**

Add existing HubSpot content

Knowledge base × Website ×

Public URL

https://website.com/support



# Data Enrichment

[Learn More](#)

Under settings there is a new, Enrichment section. This allows you to configure and control settings for both Contact and Company enrichment. Additionally you can see the available contact and company attributes on individual records as well as manage enrichment actions and credit spend within the Smart CRM.

- Enrich company and contact records automatically.
- Manually enrich or re-enrich a company or contact from an existing record.
- Bulk enrich company or contact records.

## Use Case

Enrich your contact and company records with precise, standardized data that your team needs to successfully go-to-market. With over 40+ firmographic, demographic, and technographic attributes across contacts and companies that are continually refreshed, the breadth and depth of the data offered through Breeze Intelligence has what you need to keep your CRM fresh.

**Launch region:** Global

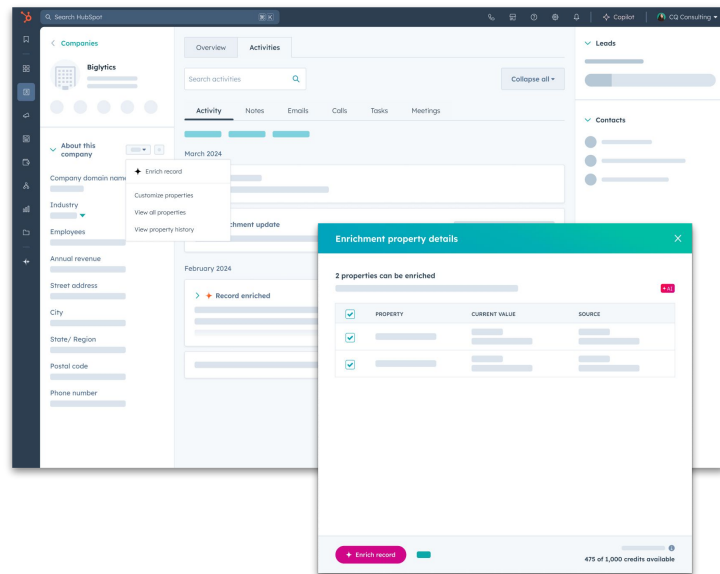
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## Supporting Features

### ✦✦ Contact Enrichment

Enrich contact records with key attributes like role, employer, location, social media links, and many more in a snap. Remove the headaches of manual data research and entry.

### ✦✦ Company Enrichment

Enrich company records with key attributes like annual revenue, industry, employee count, address, social media links, and more.

### ✦✦ Automated Enrichment

Automatically enrich companies and contacts when you add them to your CRM with key attributes like location, role, seniority, employee count and revenue.

### ✦✦ Bulk Enrichment

Enrich entire lists or single records in your CRM with key attributes like location, roles, and social media links using simple controls to ensure you get verified data at the right time.

### ✦✦ Enrichment Settings

Enable automatic enrichment of new records, continuous re-enrichment of existing records, or allow records to be manually enriched (or not).

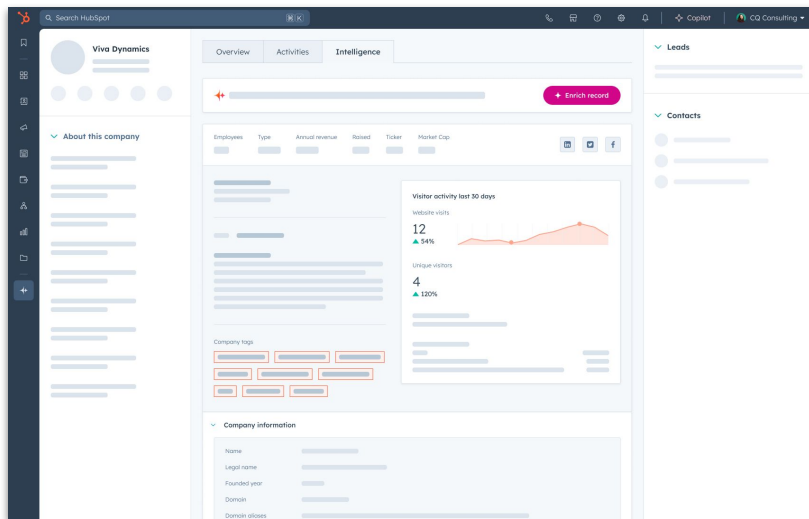
*\*Note: This is only available for 1,000 and 10,000 credits SKUs, not the 100 credits SKU.*

# Intelligence Tab

Get both company enrichment and visit-based data insights directly on the company record in a new “Intelligence” tab

## Use Case

Use the intelligence tab to quickly and conveniently understand the visit activity and data hygiene of any company in your CRM directly within the company record.



**Launch region:** Global

Free

Starter

Pro

Enterprise

Public Beta

# Buyer Intent

Know what high-fit accounts are visiting and showing intent on your website.

## Use Case

Powered by reverse-IP and enrichment data sources and your own HubSpot Smart CRM data, buyer intent tells you which companies in your target market(s) are ready to buy—regardless if they're already in your CRM or not.

**Launch region:** Global

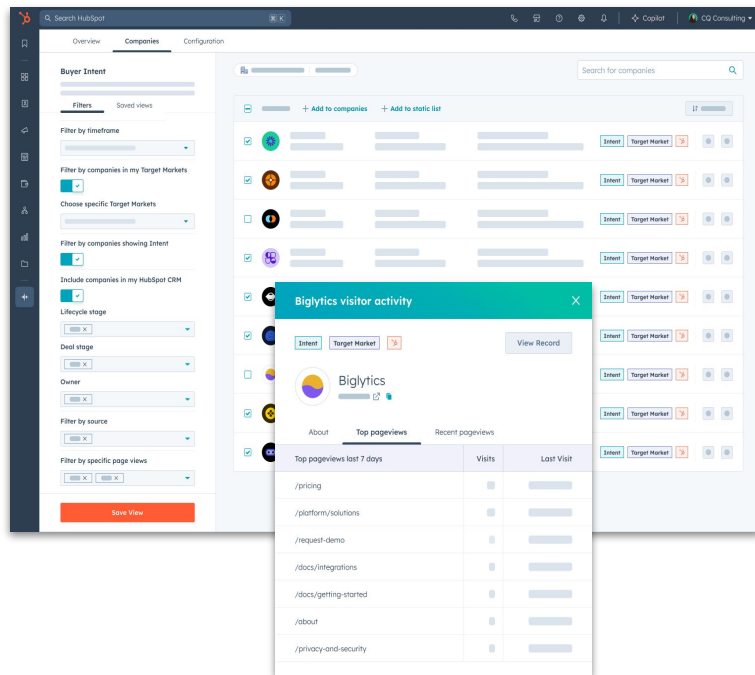
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The screenshot displays the Breeze Intelligence interface within a HubSpot environment. On the left, a sidebar contains various filters for refining the data, such as 'Filter by timeframe', 'Filter by companies in my Target Markets', 'Choose specific Target Markets', 'Filter by companies showing Intent', 'Include companies in my HubSpot CRM', 'Lifecycle stage', 'Deal stage', 'Owner', 'Filter by source', and 'Filter by specific page views'. The main area shows a list of companies with columns for 'Intent', 'Target Market', and other metrics. A modal window titled 'Biglytics visitor activity' is open, showing a table of page views for the company Biglytics.

Top pageviews last 7 days		
Page	Visits	Last Visit
/pricing	1	10/24/2023
/platform/solutions	1	10/24/2023
/request-demo	1	10/24/2023
/docs/integrations	1	10/24/2023
/docs/getting-started	1	10/24/2023
/about	1	10/24/2023
/privacy-and-security	1	10/24/2023



# Set Target Markets

See how many companies are in your target market(s) and total addressable market, and your percentage of market penetration. Edit, clone, save, or delete target markets to adapt with evolving business strategies.

## Use Case

Identify your target markets using key company attributes like industry, company location, number of employees, technologies used by the company, and annual revenue. Get deeper with company keywords that bring further specificity to your search.

**Launch region:** Global

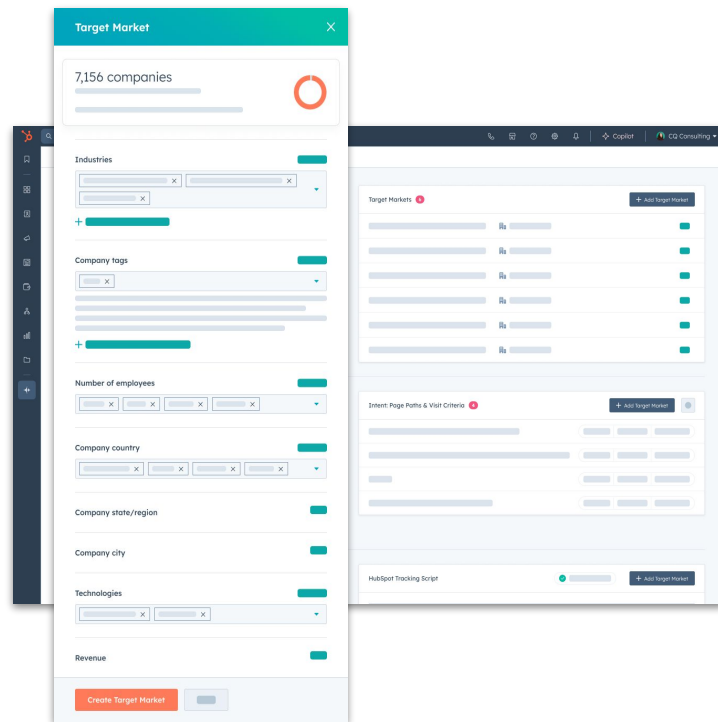
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# Set Intent Criteria

Choose which pages on your site are most important to you for signaling intent. For example, your pricing page, use case library, or demo request page. Complete your criteria by specifying the minimum required number of visits and visitors from accounts, as well as the recency of that visit activity.

## Use Case

Launch region: Global

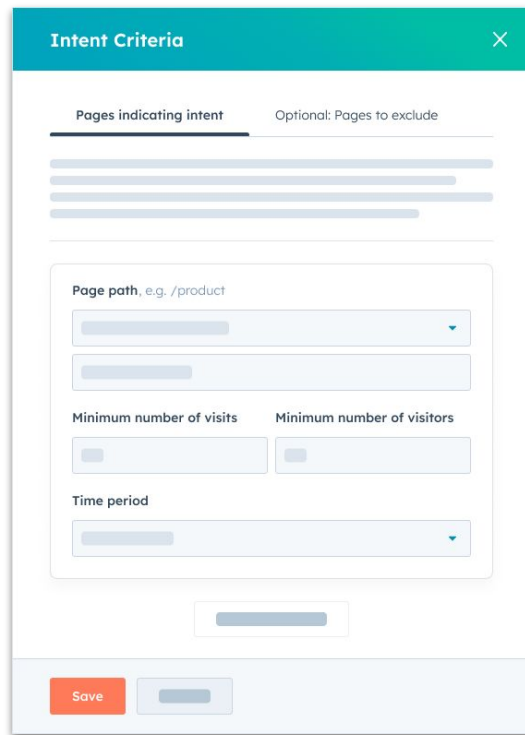
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A screenshot of the "Intent Criteria" configuration modal. The modal has a teal header with a close button (X). Below the header, there are two sections: "Pages indicating intent" and "Optional: Pages to exclude". The "Pages indicating intent" section contains three horizontal bars representing selected pages. The "Optional: Pages to exclude" section is currently empty. Below these sections is a form for defining criteria. It includes a "Page path, e.g. /product" dropdown menu, a text input field, and two sliders for "Minimum number of visits" and "Minimum number of visitors". There is also a "Time period" dropdown menu. At the bottom of the modal, there is a "Save" button and a greyed-out button.

# Company Keywords

Use company keywords to uncover company types within industries, or match them to a specific keyword or term.

## Use Case

Use 1,500+ company keywords to narrow in on specific types of companies within industries, like “Bean Farming” within “Agricultural Products”.

Company keywords can also be used on their own to identify companies that match a specific keyword or term. For example, “B2G”, “3D Printing”, “Zoos”, etc.

**Launch region:** Global

Free

Starter

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Enterprise

Public Beta

### Target Market

7,156 companies

Industries

Company tags

Number of employees

Company country

Company state/region

Company city

Technologies

Revenue

Create Target Market

# Intent Orchestration

With customizable filters tailored to your target markets, you can pinpoint companies that matter most—whether they're new prospects or existing accounts—right from your HubSpot Smart CRM.

## Use Case

Imagine effortlessly sifting through potential leads to find companies that have recently shown interest in your offerings. You can filter results by specific pageviews or traffic sources, then quickly add promising companies to your CRM and automate follow-up workflows to maximize engagement and conversions.

**Launch region:** Global

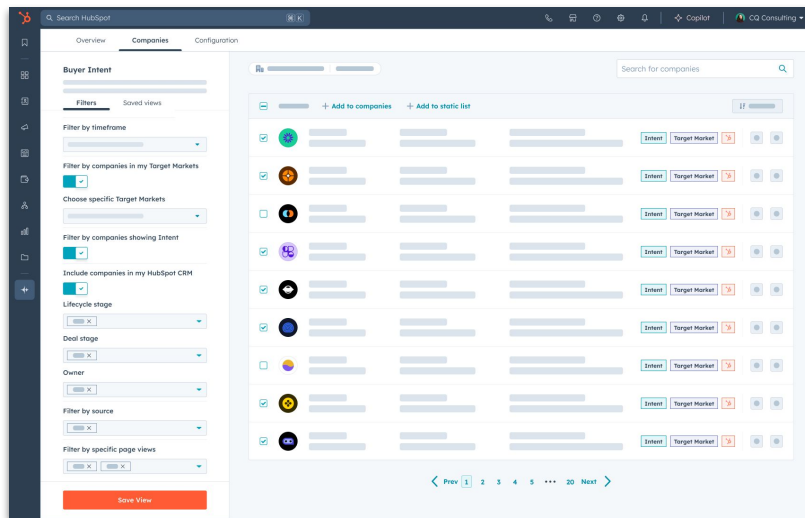
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# Automate Actions from Buyer Intent

Trigger workflows by adding companies identified in buyer intent to HubSpot lists. Prime examples include automatically assigning high-fit, high-intent accounts you discover to your reps to take next actions, and creating notifications to stay in-the-know of new promising opportunities.

## Use Case

**Launch region:** Global

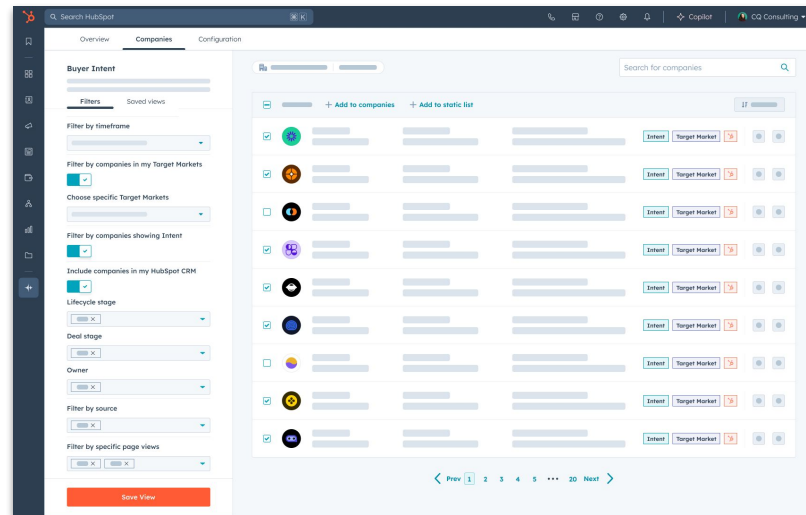
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# Form Shortening

Capture more leads without sacrificing data.

## Use Case

Extra form fields mean fewer qualified leads. Get the best of both worlds by dynamically shortening your forms with HubSpot's global enrichment database while still collecting the data you need to understand, score, and route your leads with speed and precision.

*Note: Form shortening is only available in the new forms editor. If you aren't using the new forms editor yet, simply opt-into the public beta in the "Product Updates" section of your HubSpot portal.*

**Launch region:** Global

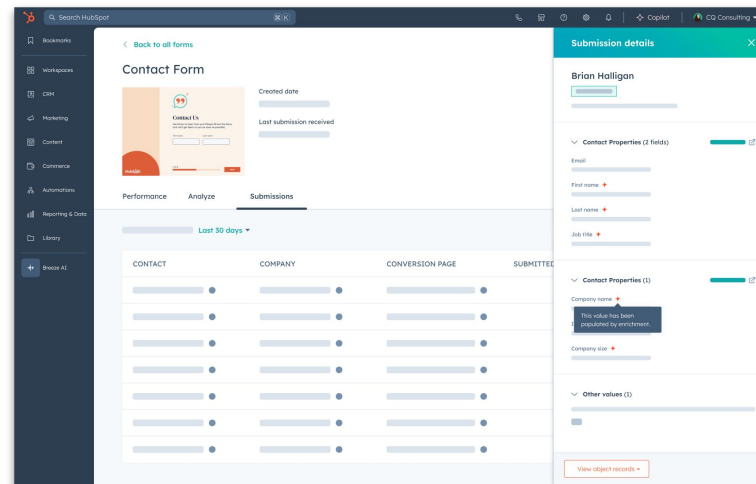
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# Additional Details for Pricing and Packaging

Pick one recurring SKU Type			Temporary SKU
100 Breeze Intelligence Credits	1,000 Breeze Intelligence Credits	10,000 Breeze Intelligence Credits	Breeze Intelligence Backfill Enrichment
Starts at \$30/month	Starts at \$150/month	Starts at \$700/month	One time \$5,000 payment
Get started in a snap and grow as you go.	The top choice for growing companies looking for fast impact.	Maximize your team's efficiency with data at scale.	Set your foundation up for success swiftly and at a remarkable value.
<ul style="list-style-type: none"><li>• Recurring</li><li>• Limit term is monthly</li><li>• CTU mechanics for overages</li><li>• No re-enrichment</li></ul>	<ul style="list-style-type: none"><li>• Recurring</li><li>• Limit term is monthly</li><li>• CTU mechanics for overages</li><li>• Free re-enrichment</li></ul>	<ul style="list-style-type: none"><li>• Recurring</li><li>• Limit term is monthly</li><li>• CTU mechanics for overages</li><li>• Free re-enrichment</li></ul>	<ul style="list-style-type: none"><li>• Backfills all contacts and companies, up to 1 million records</li><li>• Executes immediately upon purchase</li><li>• Assisted purchase only</li><li>• One time only per portal</li></ul>

# Feature Comparison

	Breeze Intelligence	ZoomInfo	Apollo	6Sense	Cognism	Clay	Lusha	LeadFeeder
Data Enrichment	✓	✓	✓	✓	✓	✓	✓	✓
Buyer Intent	✓	✓	✓	✓	✓	✓	✓	✓
Form Shortening	✓	✓	✓	✓	✗	✗	✗	✗
Powered by Smart CRM?	✓	✗	✗	✗	✗	✗	✗	✗





**Thank You**