# September 2024
# Product Updates

## RECAP

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# Marketing Hub®

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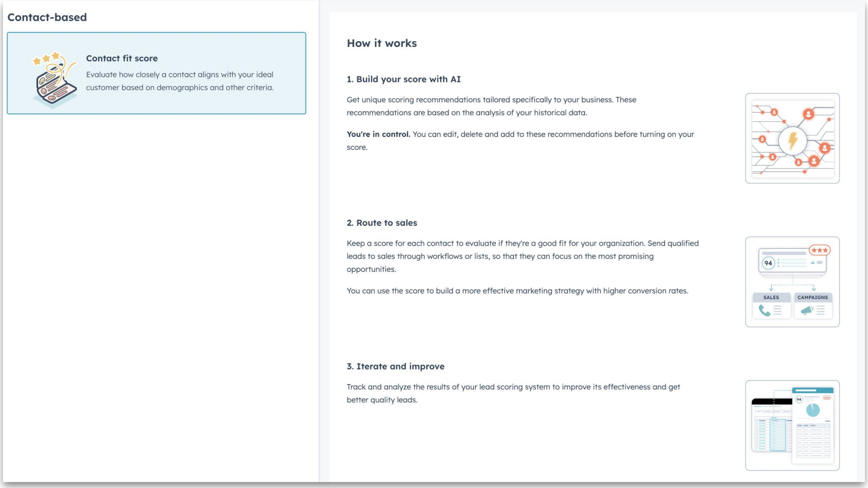
Marketing Hub®

# 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.

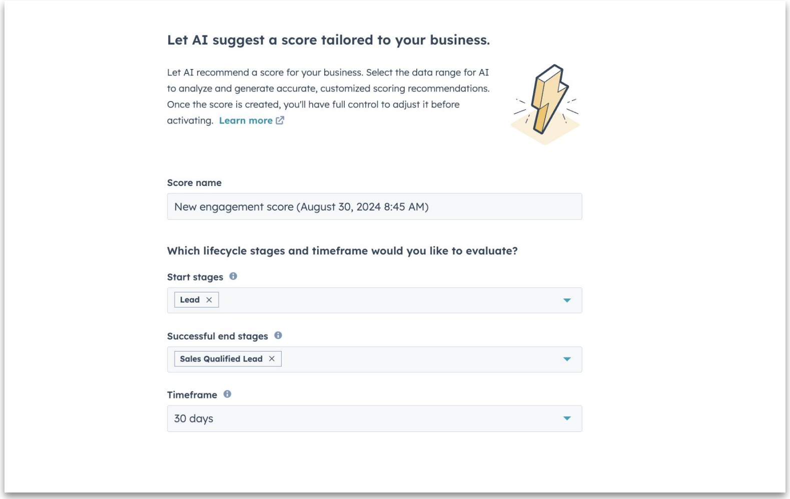
**Launch region:** Global

Free | Starter | Pro | Enterprise | Public Beta

HubSpot

# 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

Free | Starter | Pro | **Enterprise** | **Public Beta**

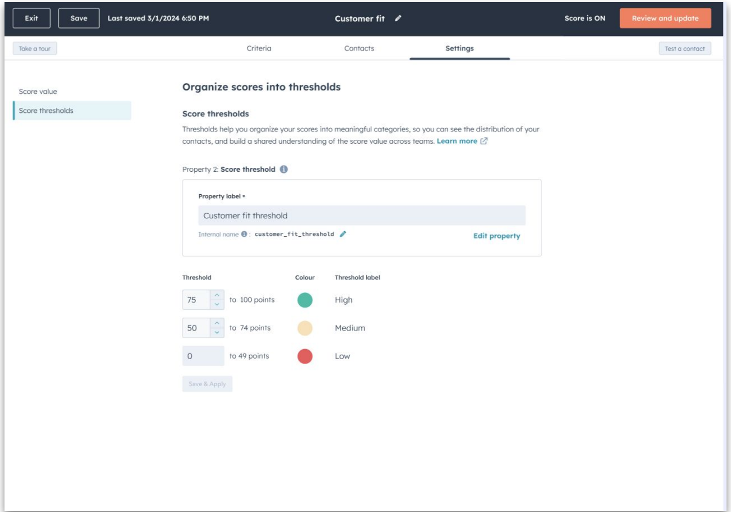
Marketing Hub®

# 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

Free Starter Pro Enterprise **Public Beta**

HubSpot

Marketing Hub®

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

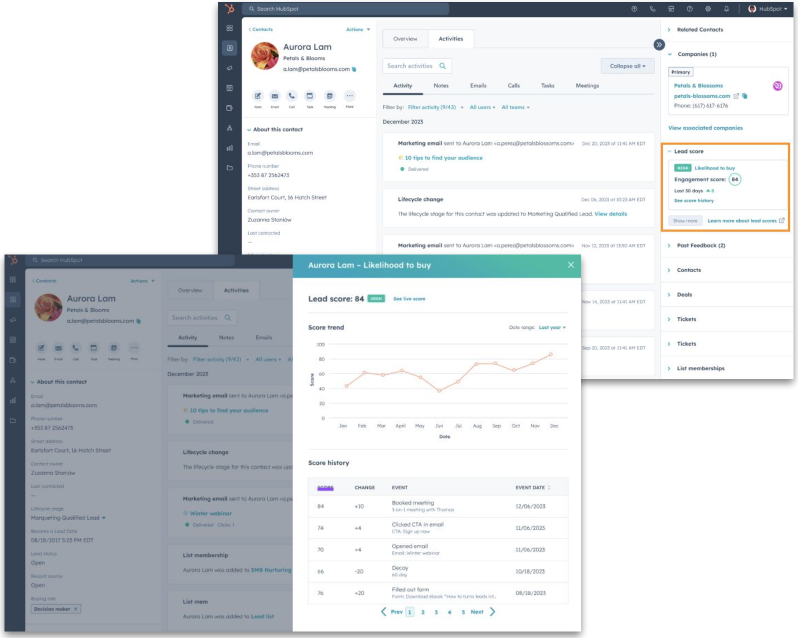
The new contact lead score CRM card and score history panel provide marketers and salespeople with an easy way to view a contact's lead score and its history directly on the contact record, including recent activities that influenced the score.

## 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

Free   Starter   Pro   Enterprise   Public Beta

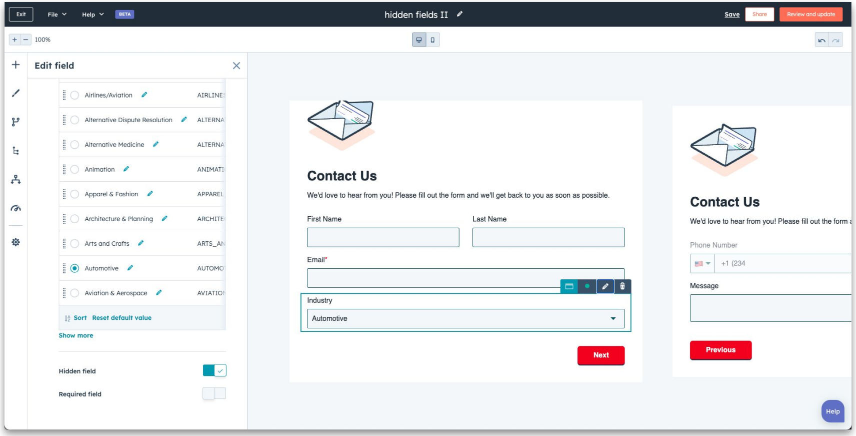



HubSpot

Marketing Hub®

# 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.

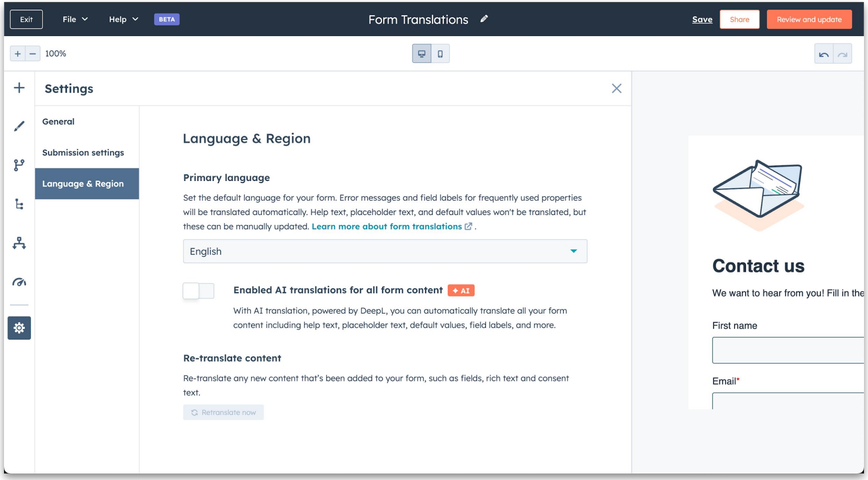
**Launch region:** Global

Free Starter Pro Enterprise Live

Marketing Hub®

# 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

Free | Starter | Pro | Enterprise | Public Beta

HubSpot

# Conditional Redirects in the New Forms Editor

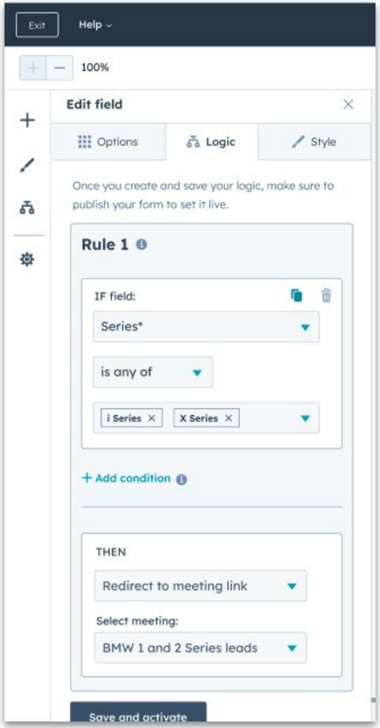
Conditional Redirects allows you to re-direct visitors to Hubspot Pages, External Pages or Meeting Scheduling Pages based on their responses and streamlines the journey from lead capture to conversion.

**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

Free Starter Pro Enterprise **Public Beta**



Marketing Hub®

# AI suggested tasks from comments

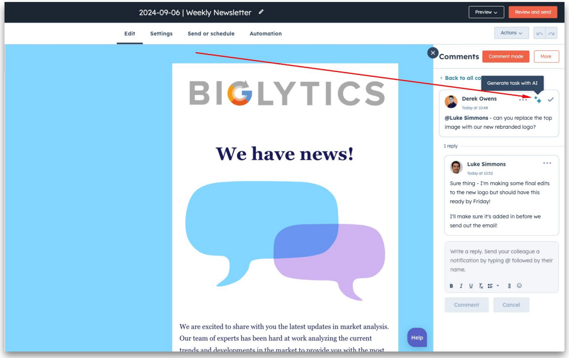
You can now generate tasks directly from comment threads in HubSpot, powered by AI, making it easy to track action items and follow up on collaborative work. This feature streamlines the process of managing tasks within busy comment threads.

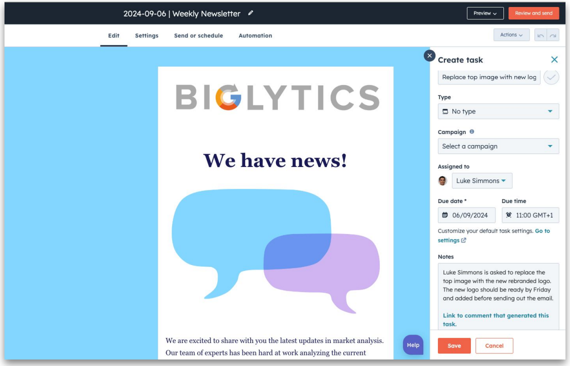
## Use Case

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

Free Starter Pro Enterprise **Public Beta**

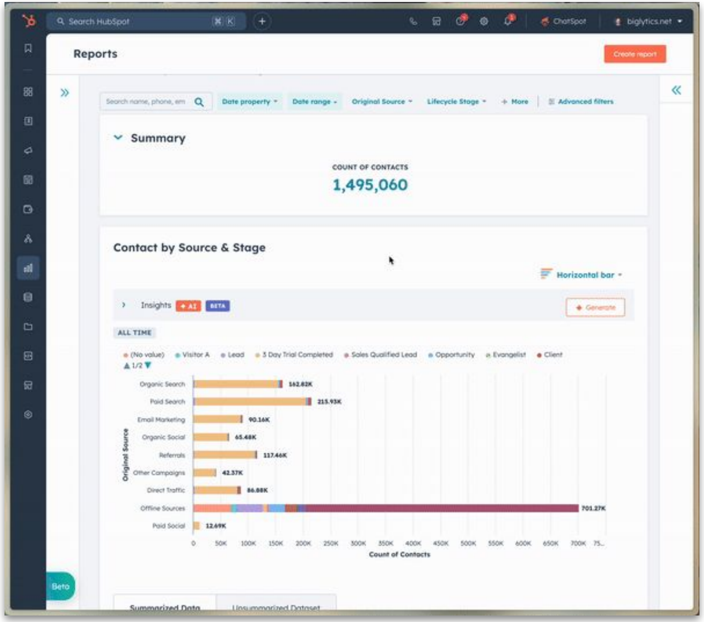



HubSpot

# 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.

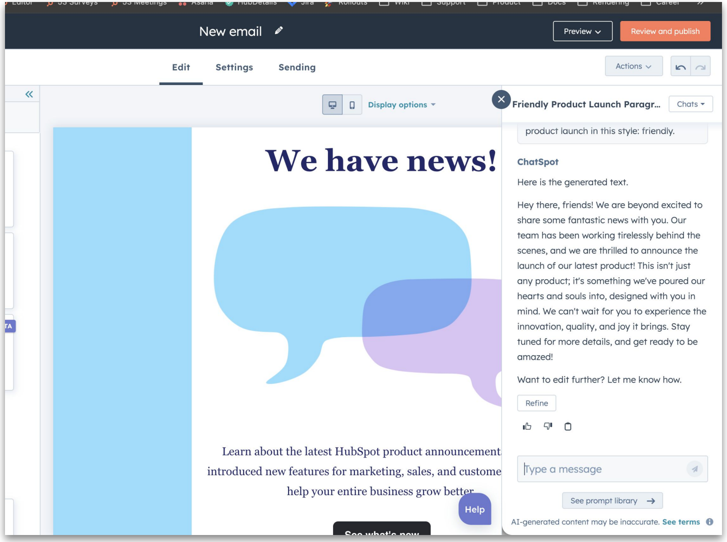
**Launch region:** Global

Free Starter Pro Enterprise Live

Marketing Hub®

# 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

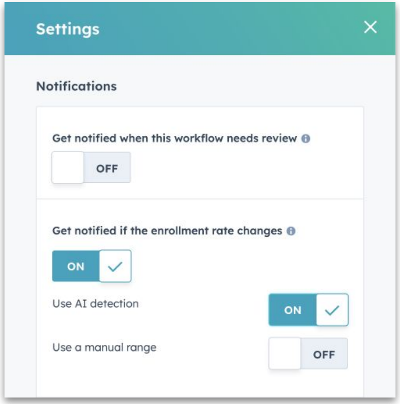
Free Starter Pro Enterprise **Public Beta**

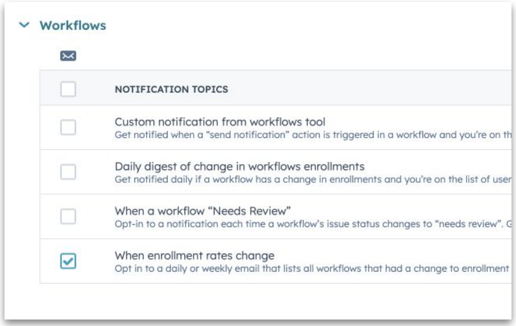
HubSpot

Marketing Hub®

# 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

Free | Starter | Pro | Enterprise | **Public Beta**

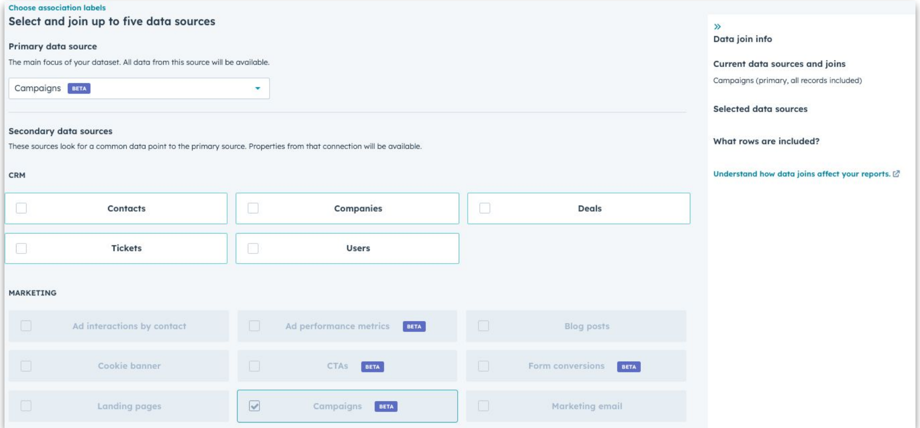
HubSpot

Marketing Hub®

# 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

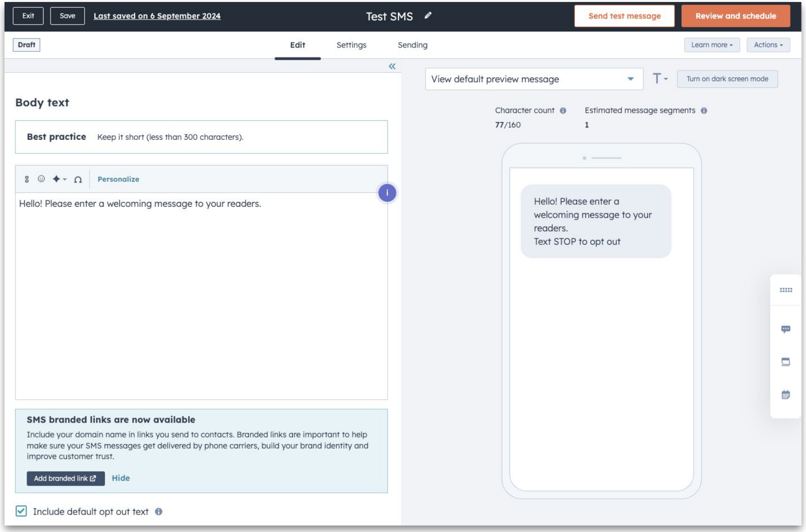
Free Starter Pro Enterprise **Public Beta**

HubSpot

Marketing Hub®

# 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.

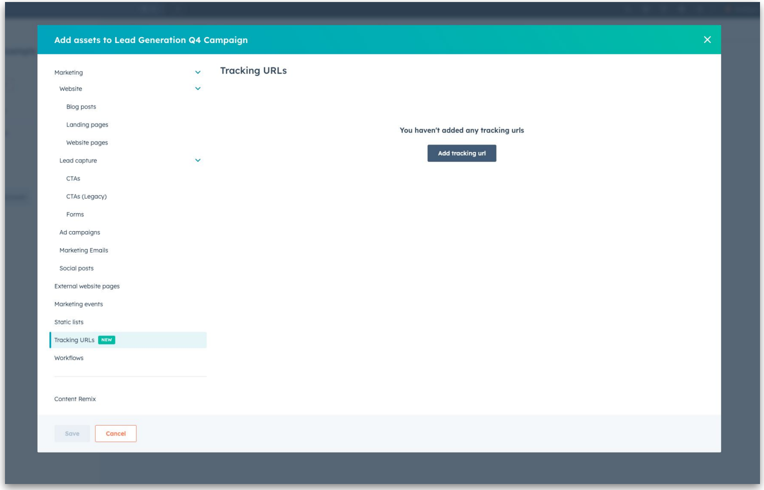
**Launch region:** Global

Free Starter Pro **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

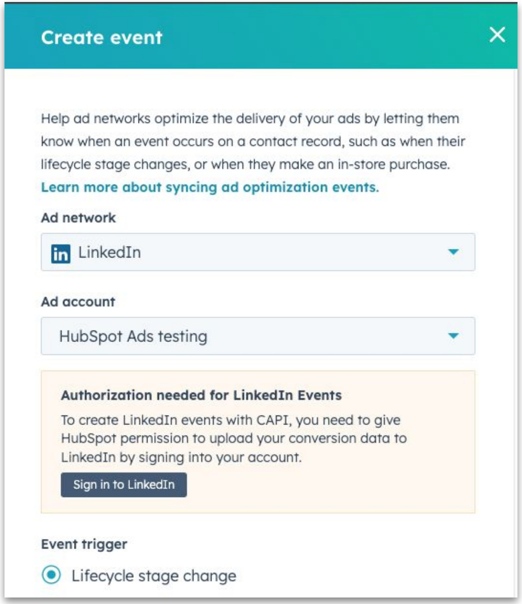
Free Starter Pro Enterprise **Public Beta**

Marketing Hub®

# 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**

HubSpot

Marketing Hub®

# AI powered Gibberish Spam Detection in form submissions

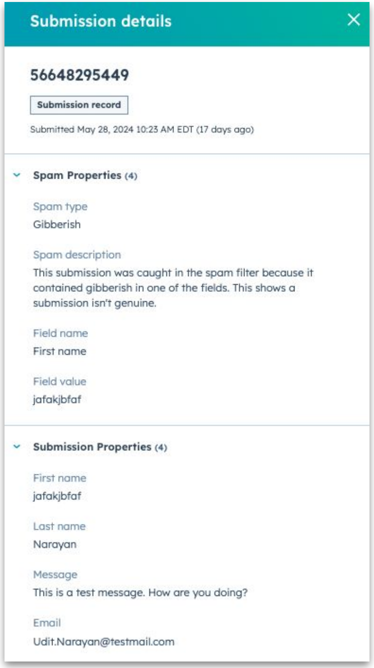
AI-powered gibberish detection identifies incoming form submissions with gibberish data in the contact first name, last name, and message properties.

## 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

Free Starter Pro Enterprise Public Beta




HubSpot

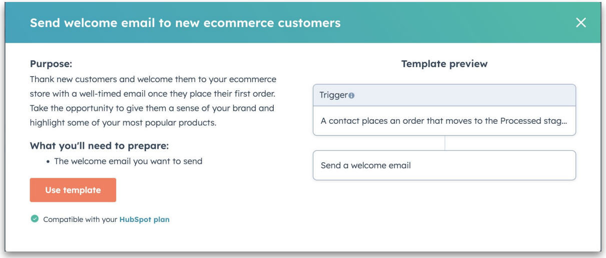
Marketing Hub®

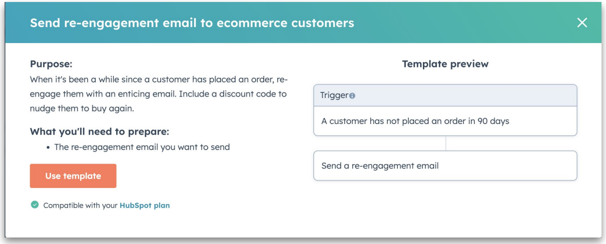
# New order- and cart-based workflow templates available

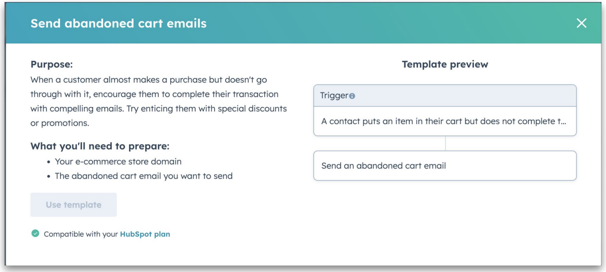
Three new order- and cart-based workflow templates are now available in beta in the workflow template library: Ecommerce Welcome Workflow, Abandoned Cart Workflow, and Re-engagement Workflow.

## 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**

HubSpot

# 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

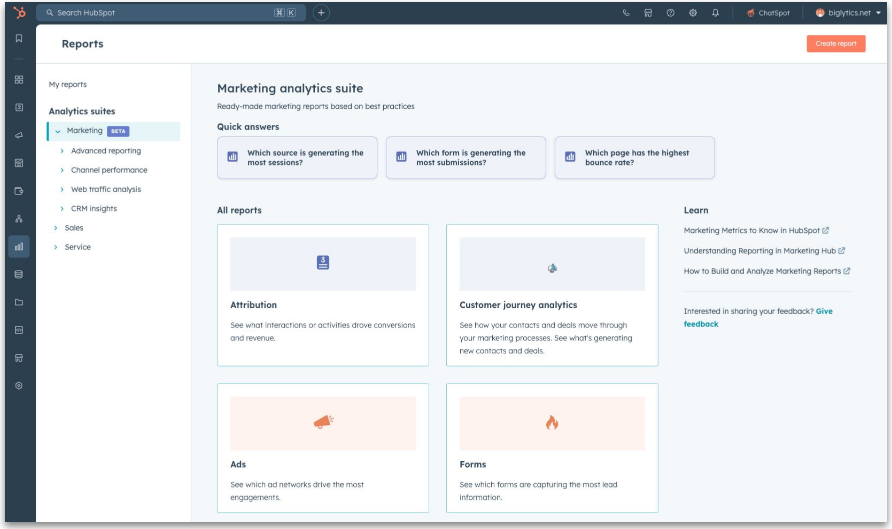
Marketing Hub®

# 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 | Pro | 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

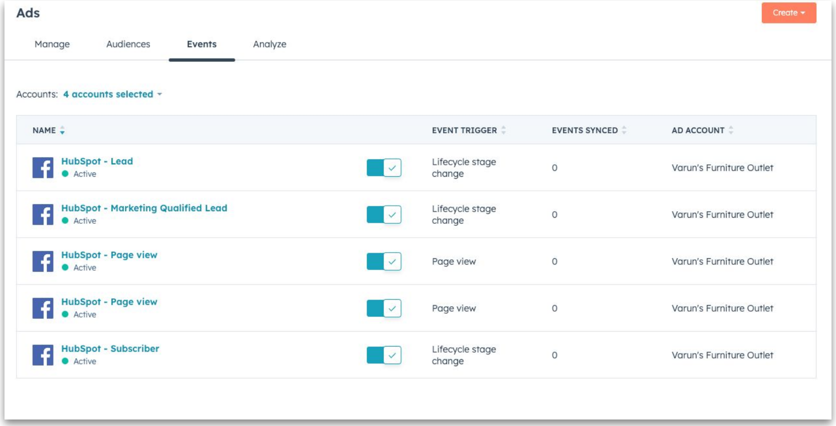
Free Starter Pro **Enterprise** **Live**

Marketing Hub®

# 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

Free Starter Pro **Enterprise** **Public Beta**

HubSpot

# Content Hub™

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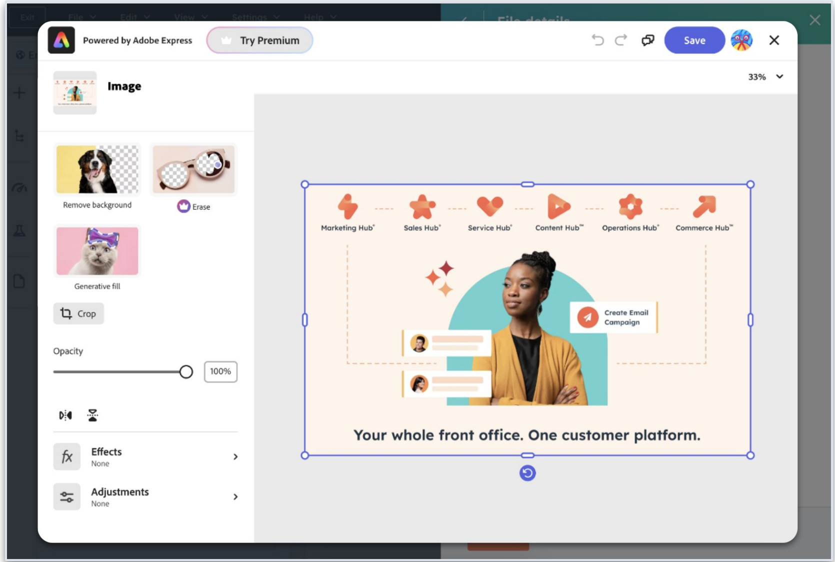
# Adobe Express

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

Free Starter Pro Enterprise Public Beta

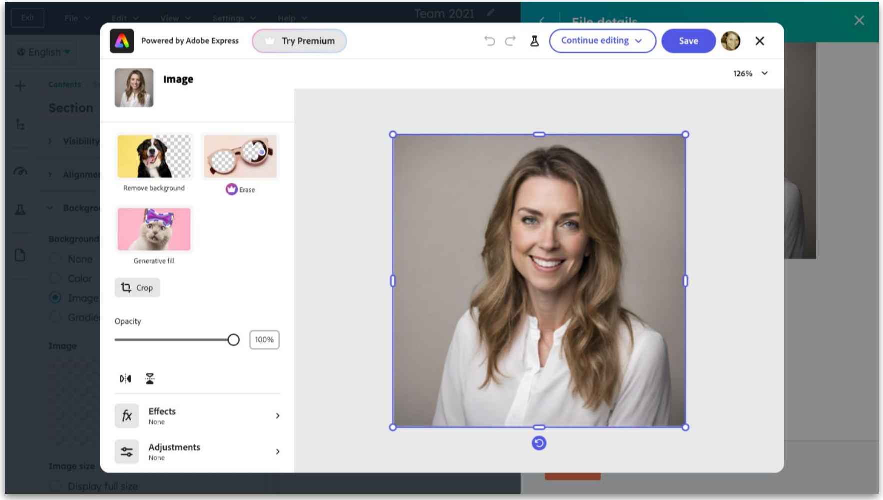
Content Hub™

# 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

Free Starter **Pro** **Enterprise** **Live**

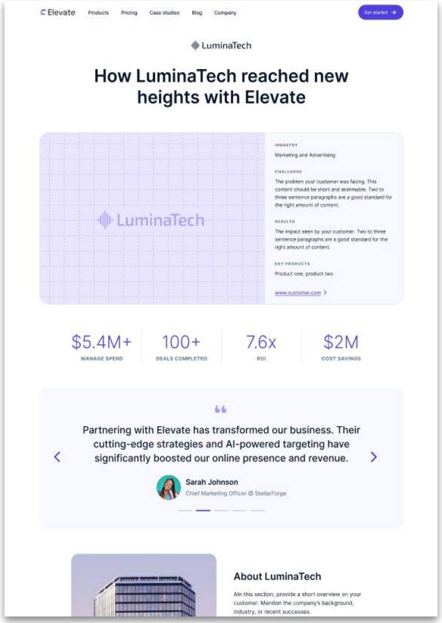
HubSpot

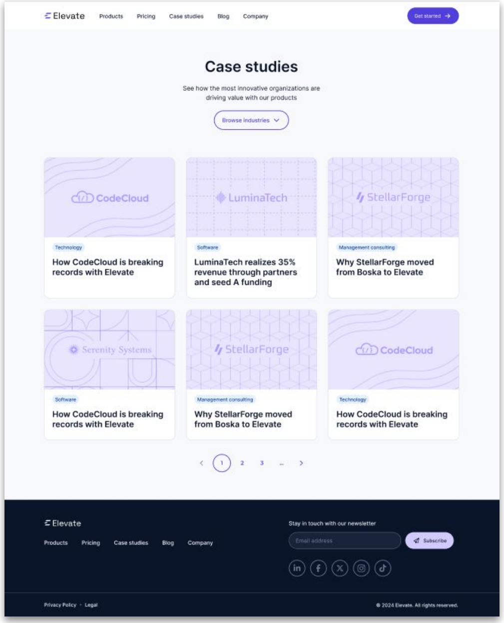
# Case studies content type

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

HubSpot

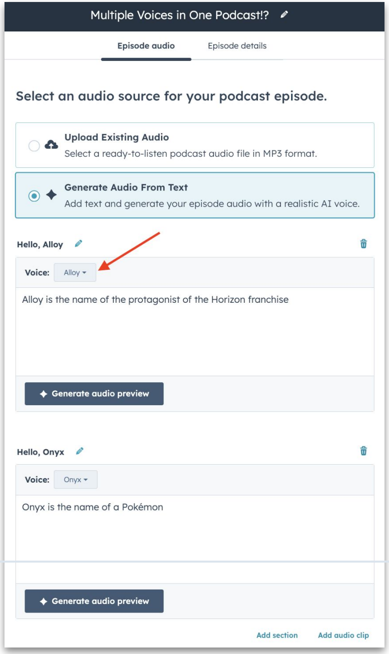
Content Hub™

# 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

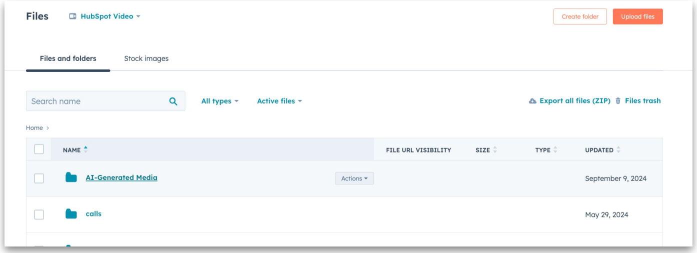
Free Starter Pro Enterprise Live

Content Hub™

# AI-Powered File & Image Search

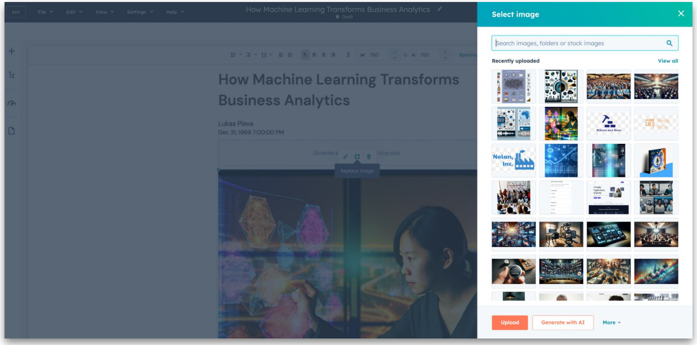
Learn More

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

Free Starter Pro Enterprise Public Beta

HubSpot

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+

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Marketing Hub® Content Hub™

# 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.

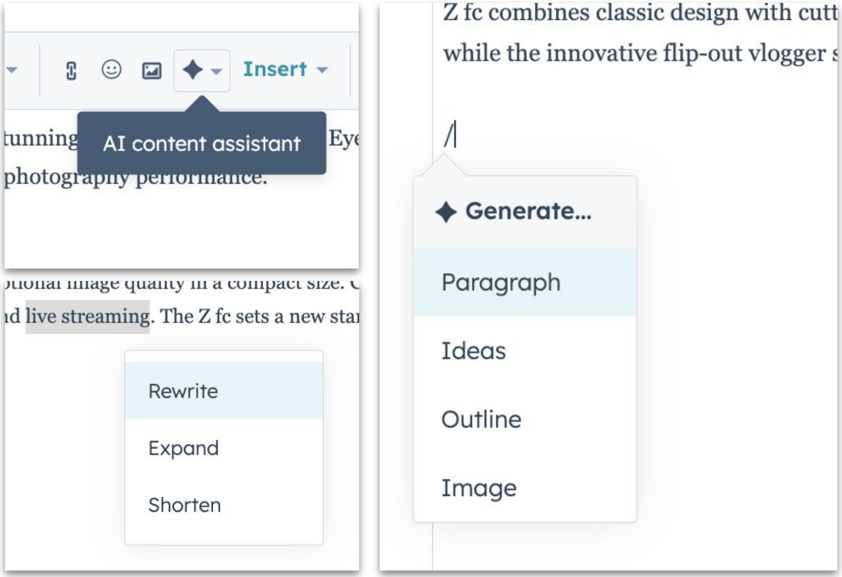
**Launch region:** Global

Free Starter Pro Enterprise Live

HubSpot

# 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

Free Starter Pro Enterprise 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.

**Launch region:** Global

Free Starter Pro Enterprise Live

# Sales Hub®

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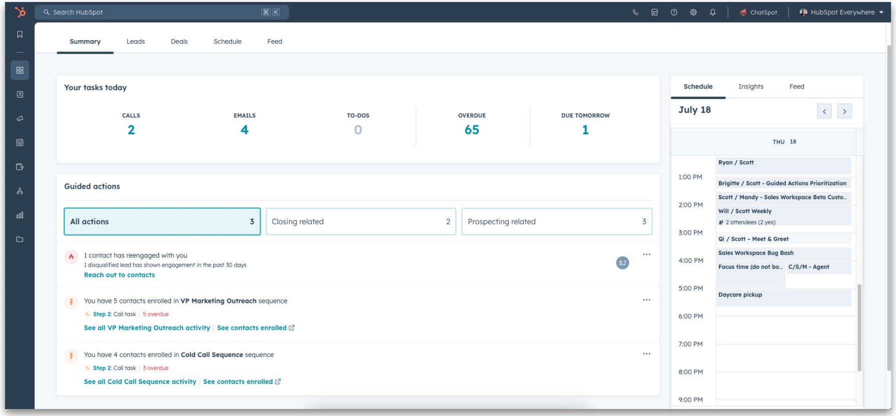
Sales Hub®

# 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.

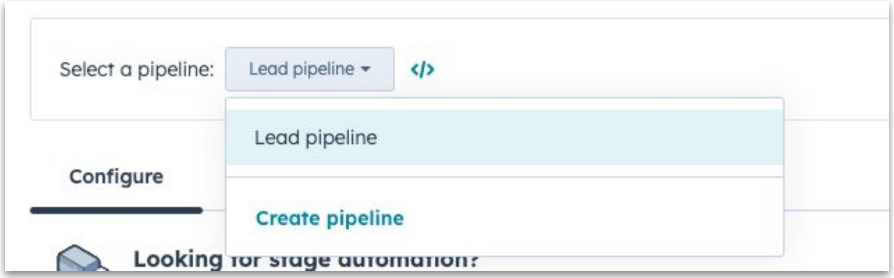
**Launch region:** Global

Free | Starter | Pro | Enterprise | Public Beta

HubSpot

# 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

Free Starter Pro Enterprise **Public Beta**

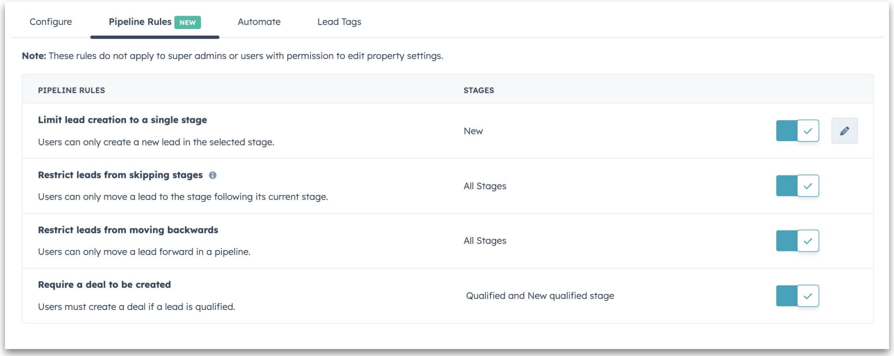
Sales Hub®

# 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.




**Launch region:** Global

Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

Sales Hub®

# Leads Summary Public Beta

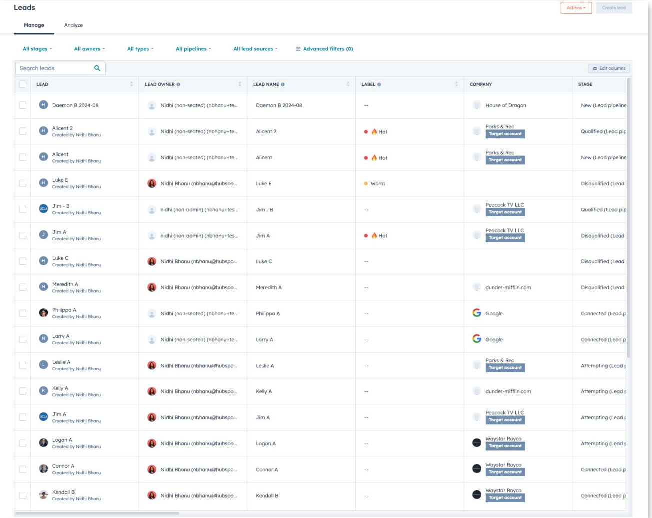
Introducing the new Leads Summary feature, designed for admins to effortlessly view and manage lead data at scale while gaining valuable insights into lead performance through embedded funnel reporting.

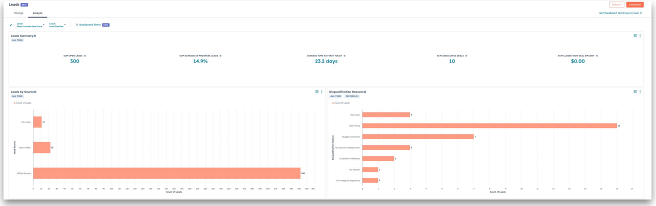
## Use Case

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 Starter Pro Enterprise **Public Beta**

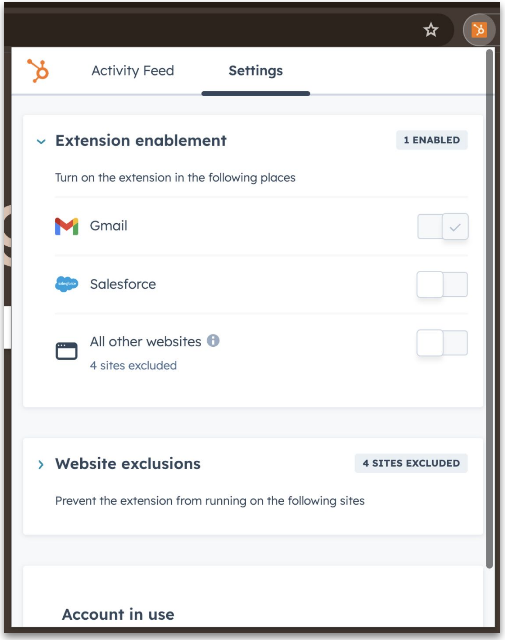


HubSpot

# 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.

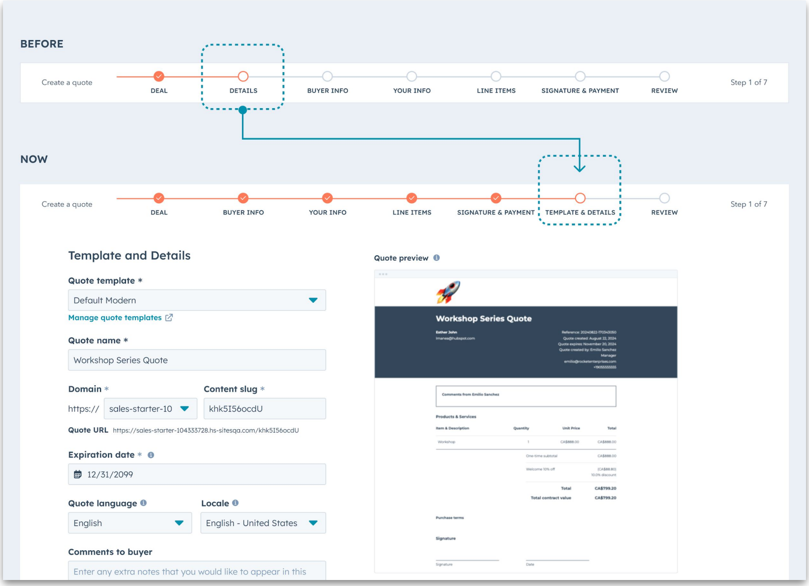
**Launch region:** Global

Free Starter Pro Enterprise Live

Sales Hub®

# 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

Free Starter Pro Enterprise Live

HubSpot

# 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

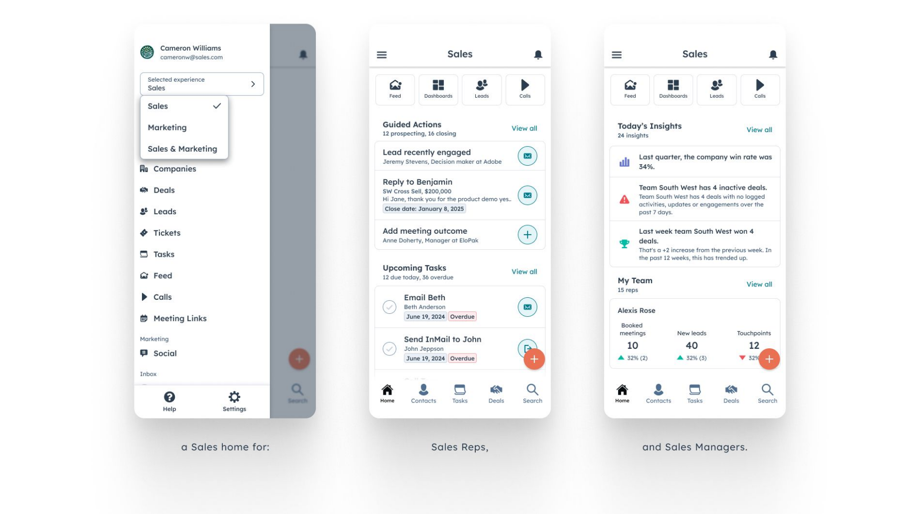
Free Starter Pro Enterprise Live

Sales Hub®

Mobile

# 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 Starter Pro Enterprise **Public Beta**

HubSpot

Sales Hub® Mobile

# 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

Free Starter Pro Enterprise **Public Beta**

HubSpot

# Service Hub®

Powered by Breeze

# 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

Free Starter Pro Enterprise **Public Beta**

Service Hub®

# 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.

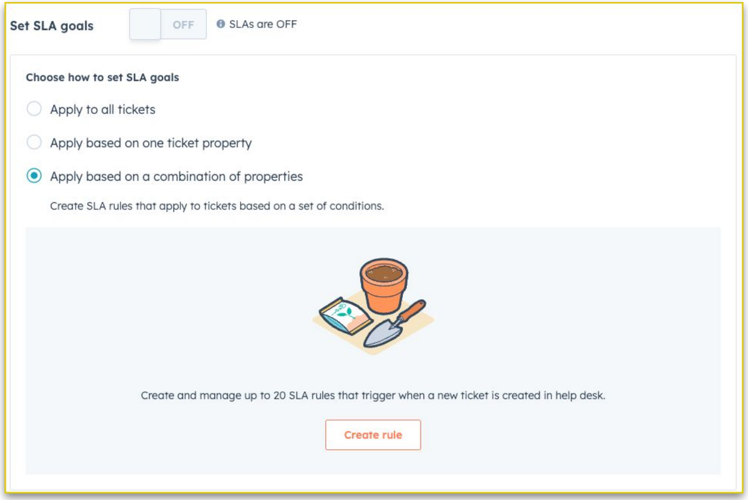
**Use Case**

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

Free Starter Pro Enterprise **Public Beta**



# Skill-based Ticket Routing for Live Chat

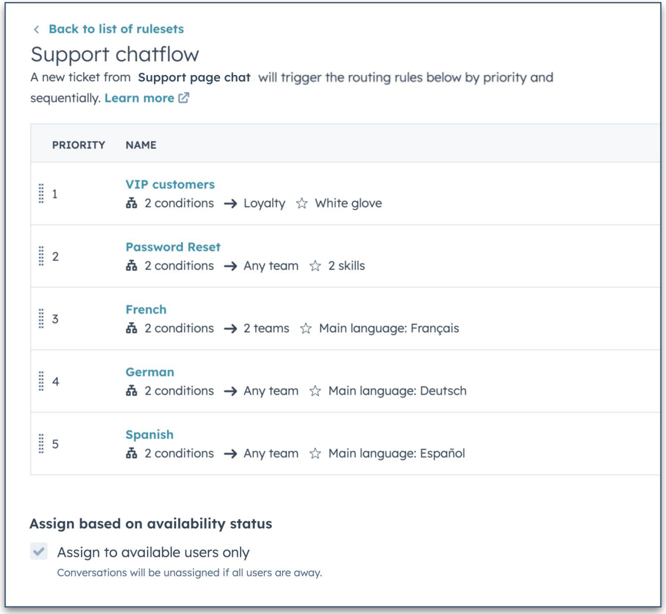
Learn More

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.



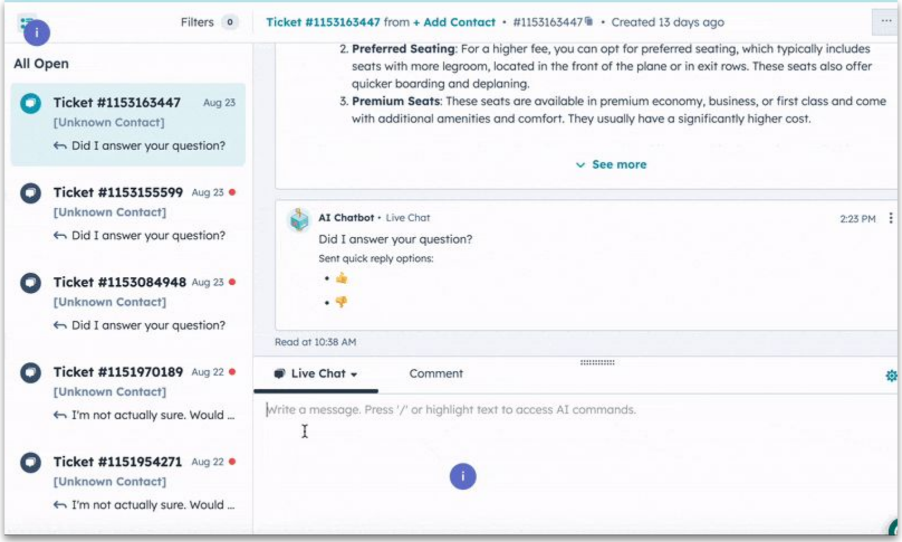

**Launch region:** Global

Free Starter Pro Enterprise **Public Beta**

Service Hub®

# 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

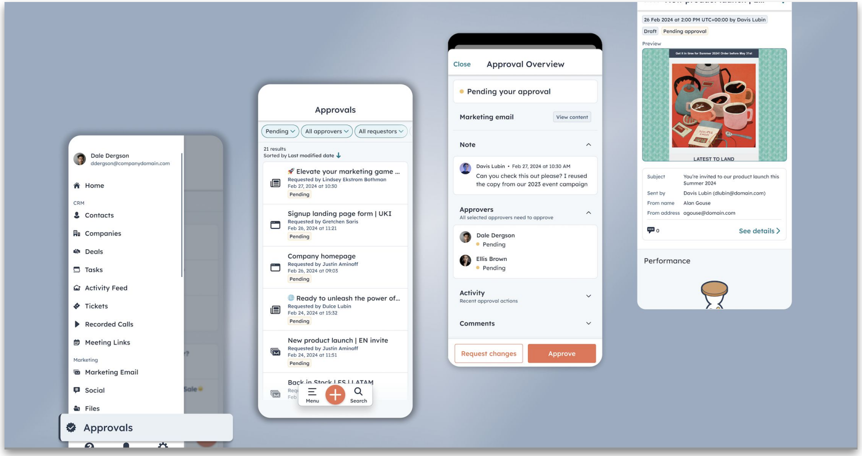
Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

Service Hub®

# 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

Free Starter Pro Enterprise Live

HubSpot

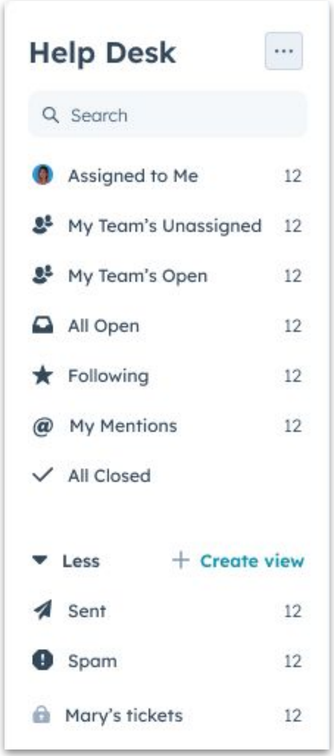
Service Hub®

# 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.



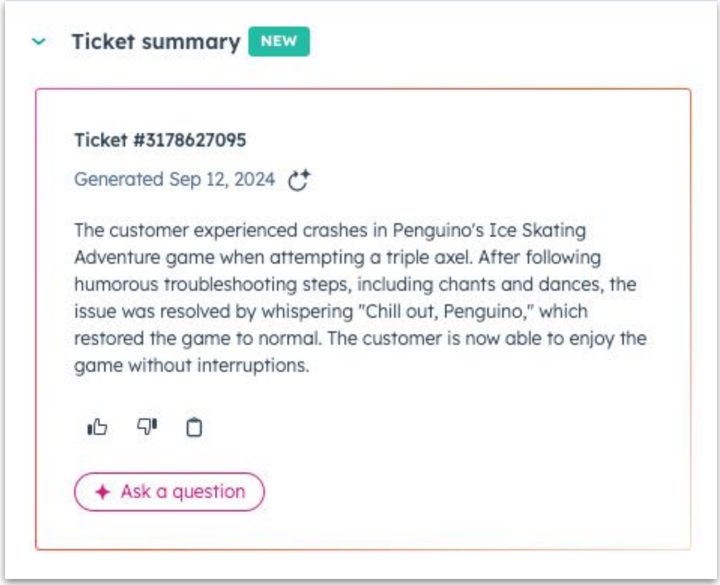

**Launch region:** Global

Free Starter Pro Enterprise Live

Service Hub®

# 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).

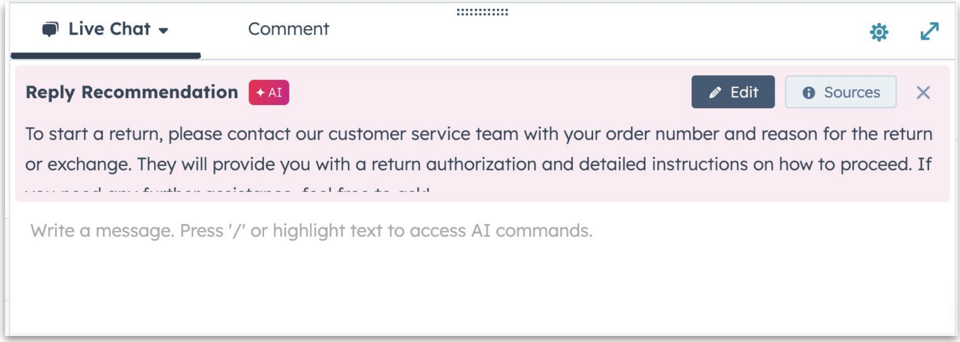
**Launch region:** Global

Free Starter Pro Enterprise Live

Service Hub®

# 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

Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

Service Hub®

# 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**

HubSpot

Sales Hub®

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Service Hub®

Powered by Breeze

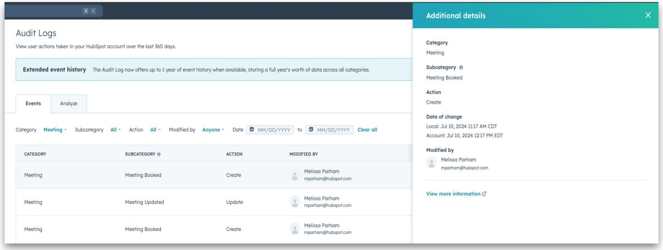
Sales Hub® Service Hub®

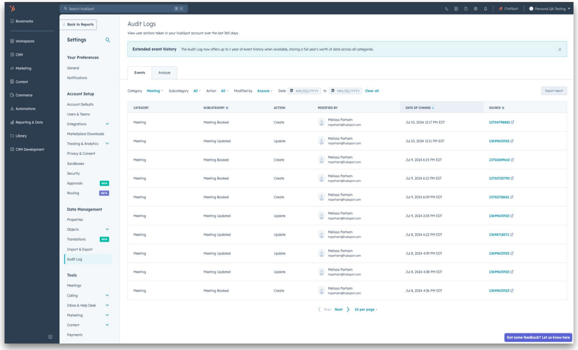
# User changes to a meeting are now surfaced in the Audit Log

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 Pro Enterprise Live

HubSpot

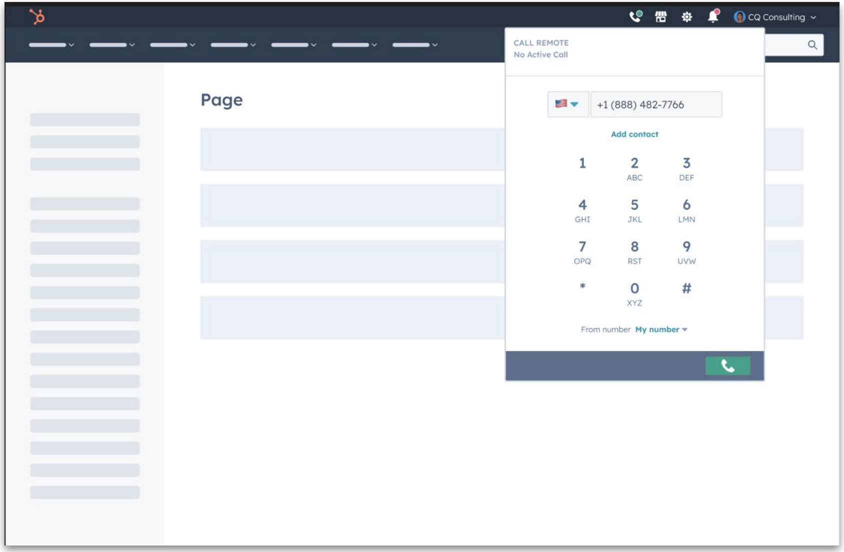
Sales Hub® Service Hub®

# 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

Free Starter Pro Enterprise Live

HubSpot

Sales Hub® Service Hub®

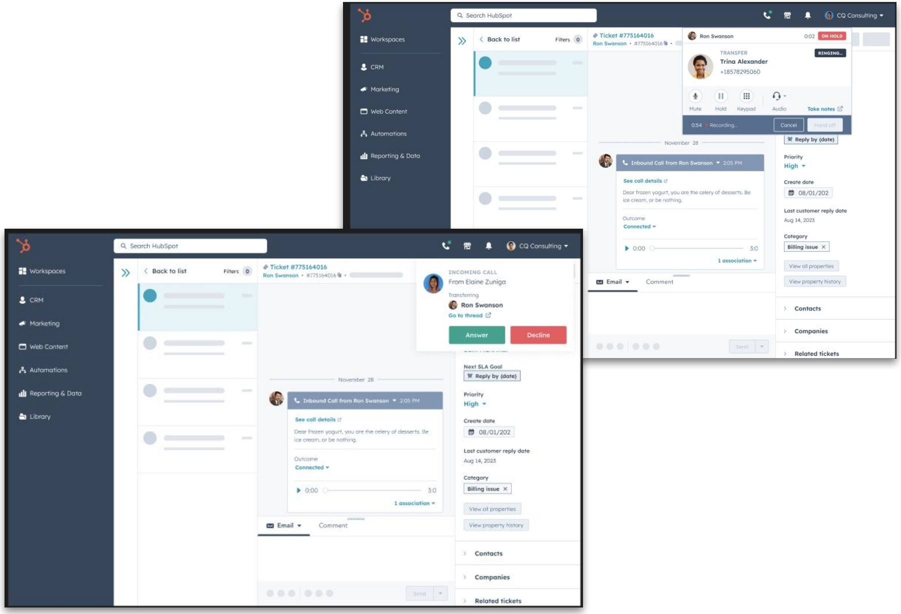
# Transfer Calls Inbound Calls in Inbox & Help Desk

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

Free Starter Pro Enterprise Live

HubSpot

Sales Hub®

Service Hub®

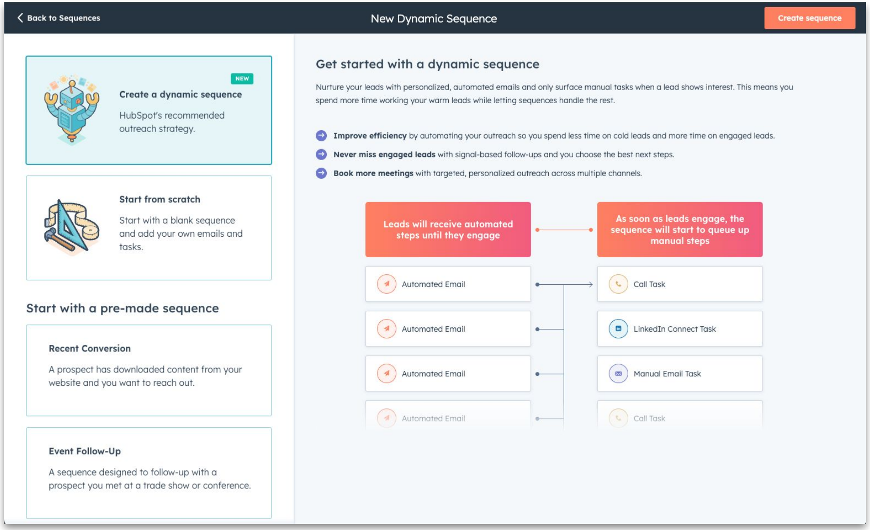
# Dynamic Sequences

[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.



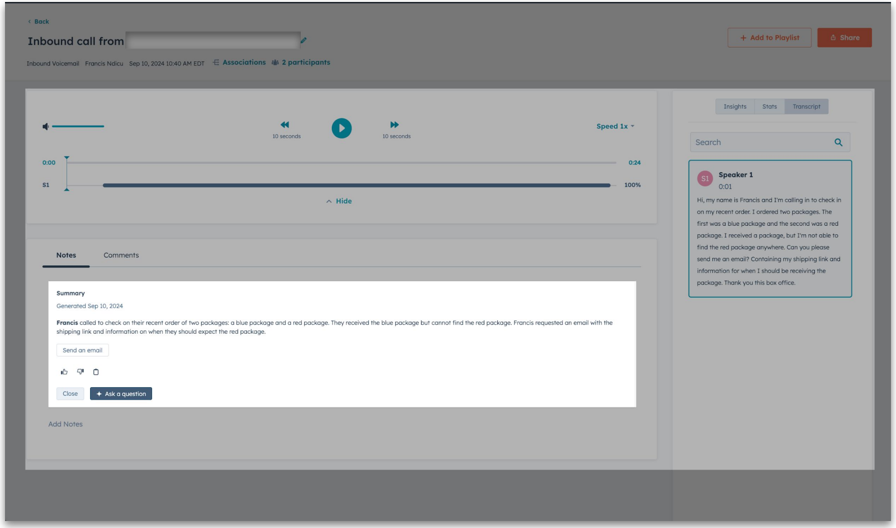

**Launch region:** Global

Free | Starter | Pro | Enterprise | Public Beta

Sales Hub® Service Hub®

# 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.

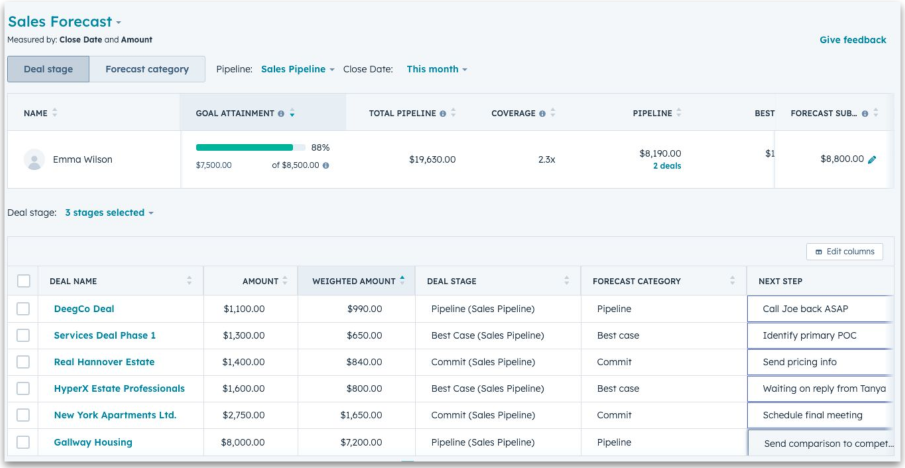
**Launch region:** Global

Free Starter Pro Enterprise Live

Sales Hub® Service Hub®

# 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

Free Starter Pro Enterprise Live

HubSpot

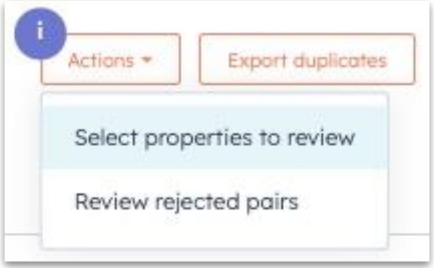
# Operations Hub®

Powered by Breeze

Operations Hub®

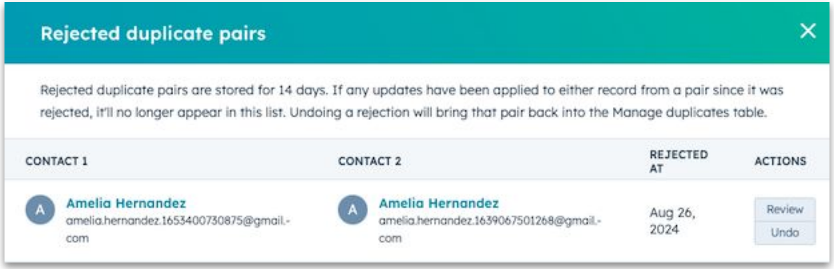
# Undo Reject in Duplicate Management Tool

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.



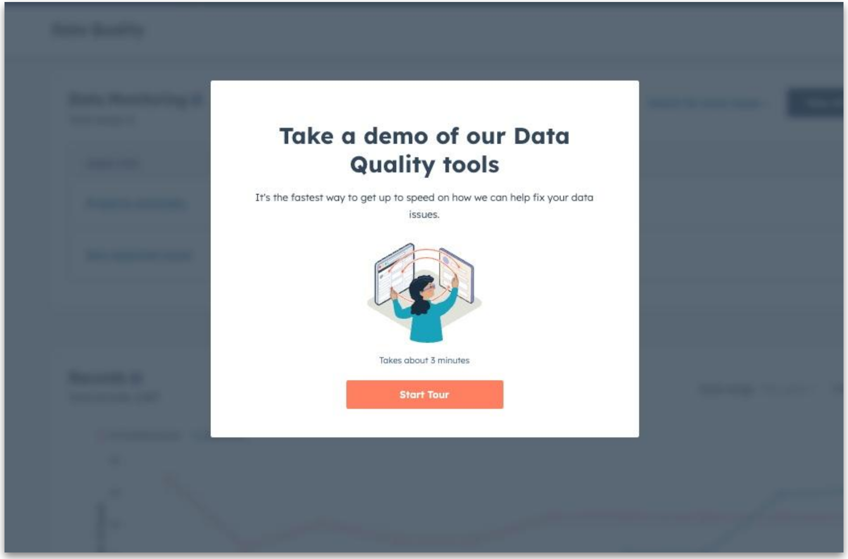

**Launch region:** Global

Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

# 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

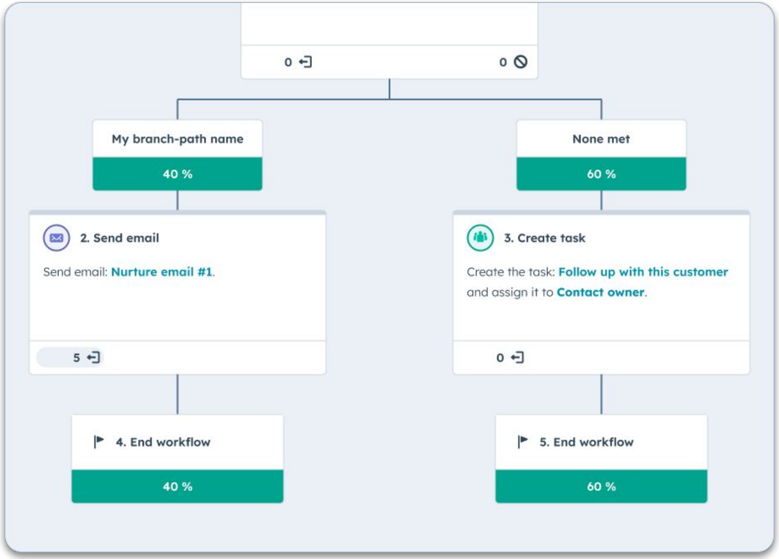
The workflow editor now shows aggregate conversion and performance data, which is visualized directly on each workflow's diagram.

## 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

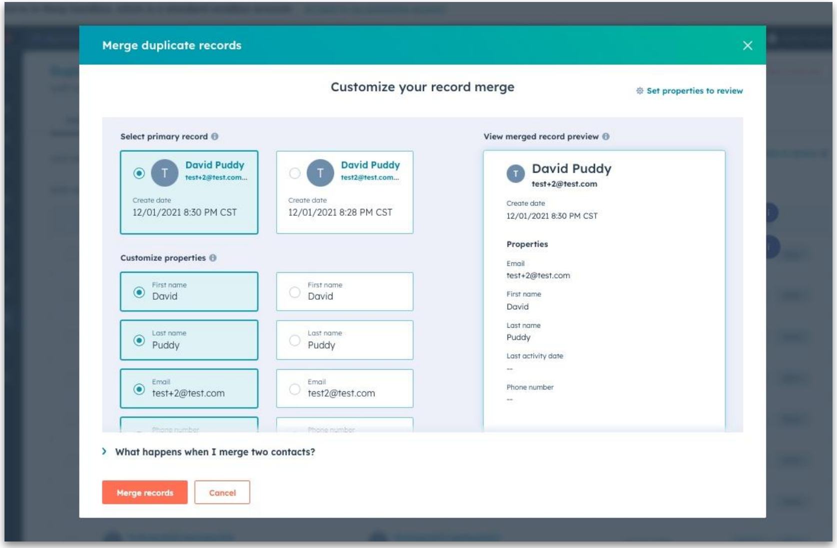
Free Starter Pro Enterprise Live



Operations Hub®

# 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

Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

Operations Hub®

# 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 Pro Enterprise Live

HubSpot

# 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

Operations Hub®

# 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**

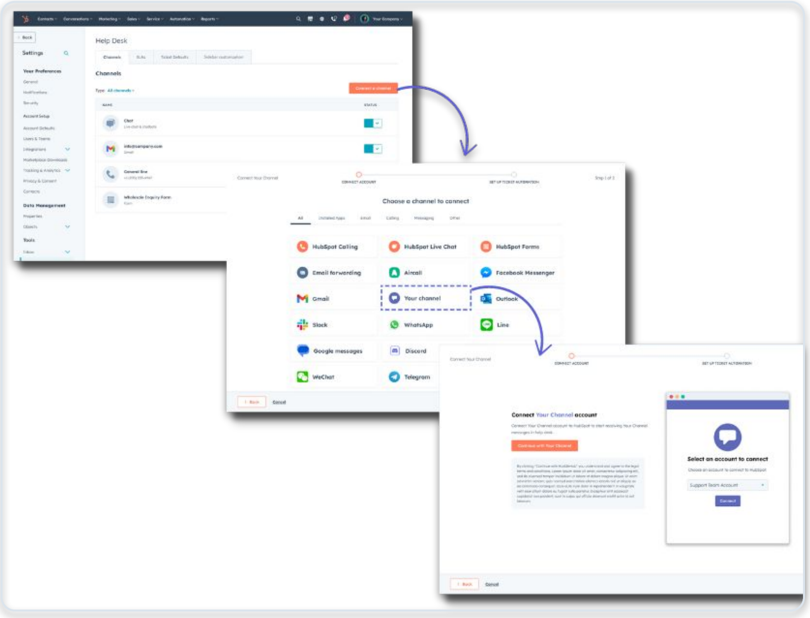
HubSpot

# 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

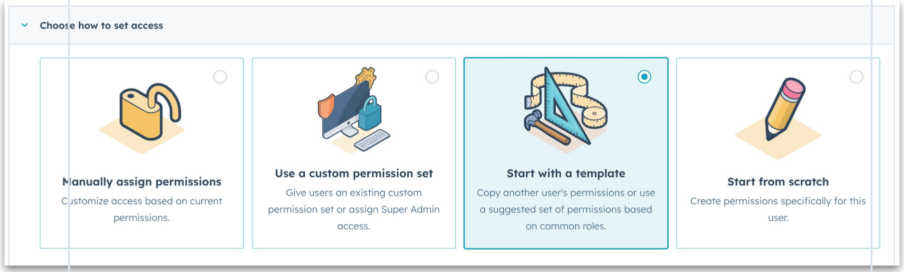
# Developer Permission Template

Learn More

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.



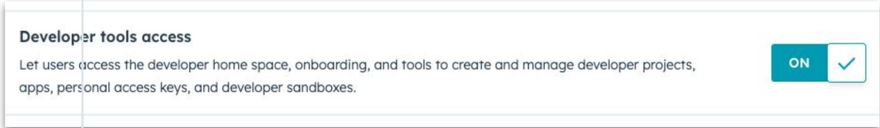

**Launch region:** Global

Free Starter Pro Enterprise Public Beta

# New Developer Permission Set

[Learn More]

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

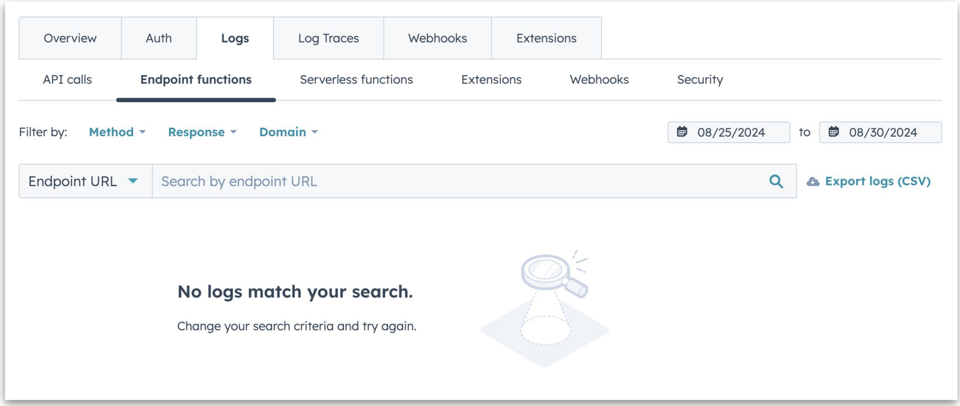
Previously, developers often required Super Admin access to use these tools, which posed security risks. This update provides admins with greater control, enabling them to grant necessary access without compromising the overall security of the HubSpot instance.

**Launch region:** Global

Free | Starter | Pro | Enterprise | **Public Beta**

# 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**

Developer Platform

# 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:

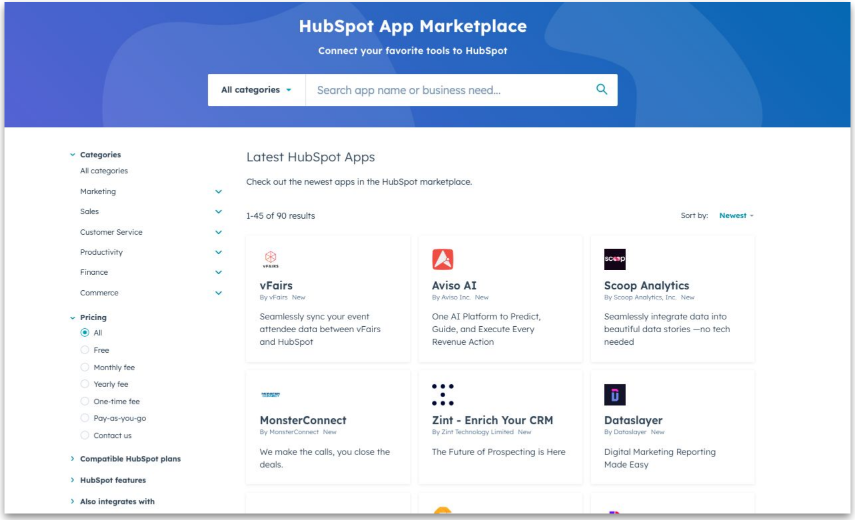
- Daily:
  - Pro: 500k
  - Enterprise: 500k
  - Capacity Pack: 1M total
- Burst:
  - Free / Starter: 100 requests per 10 seconds
  - Pro: 150 per 10 seconds
  - Ent: 150 per 10 seconds
  - Capacity Pack: 200 per 10 seconds

HubSpot

# 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

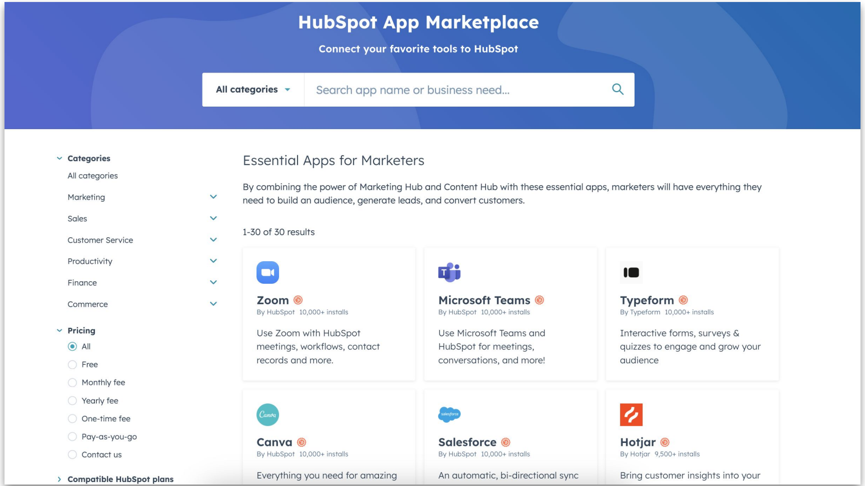
With over 1,700 apps now available, HubSpot’s App Marketplace empowers you to seamlessly integrate new capabilities into your workflows. These updates enable your teams to optimize operations, enhance collaboration, and drive growth more effectively.

**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

Free Starter Pro Enterprise Live

# 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

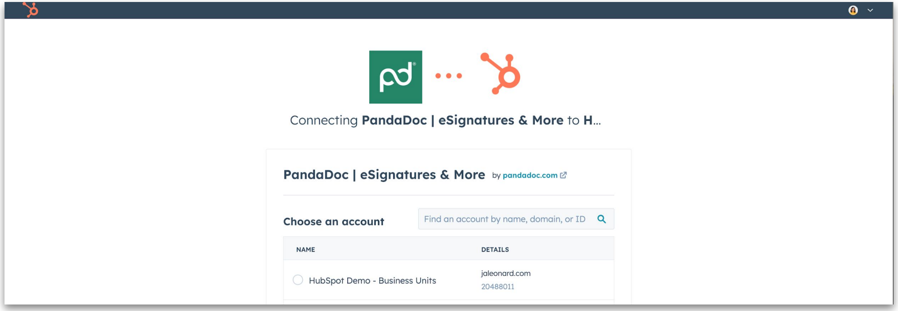
Free Starter Pro Enterprise Live

# 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.

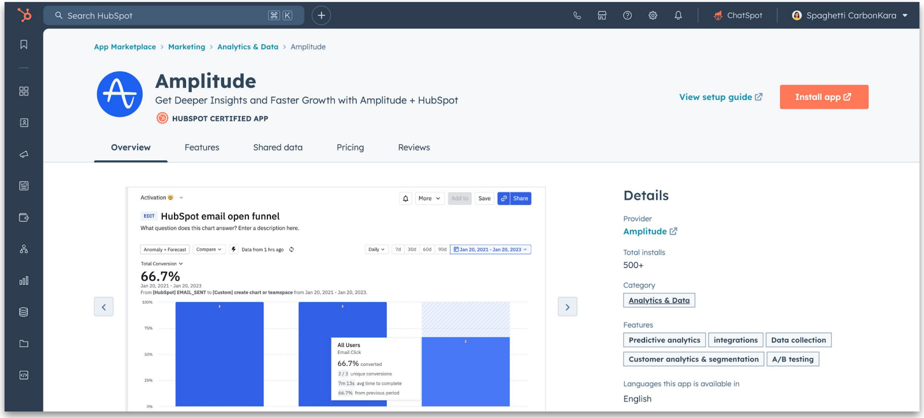



**Launch region:** Global

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

HubSpot

# 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.

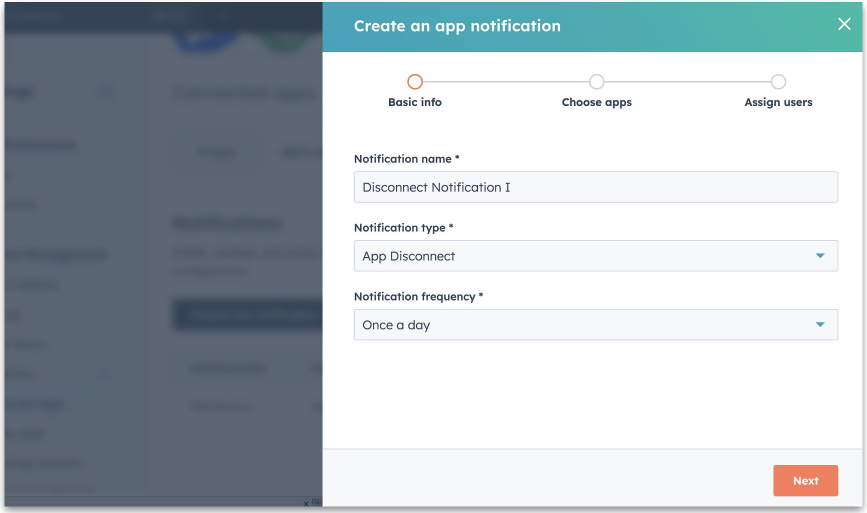
**Use Case**

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

Free Starter Pro Enterprise Live



# Smart CRM™

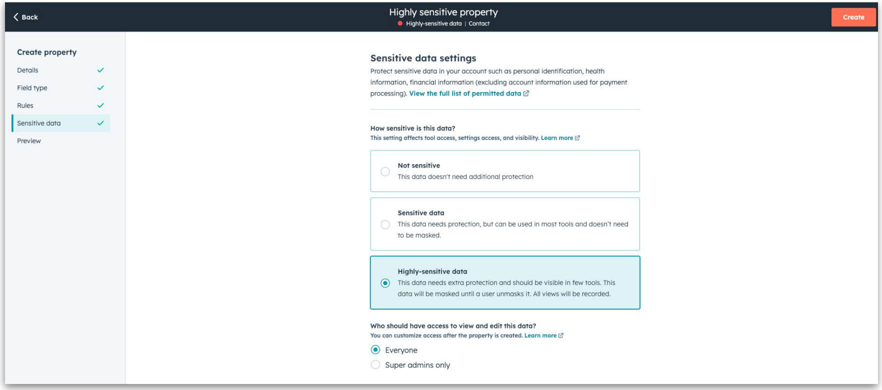
Powered by Breeze

Smart CRM™

# 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

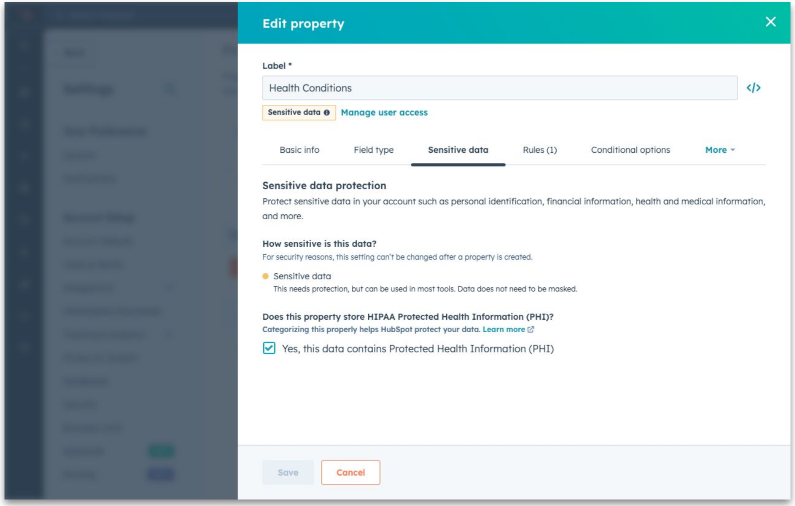
Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

# 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

Smart CRM™

# 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.

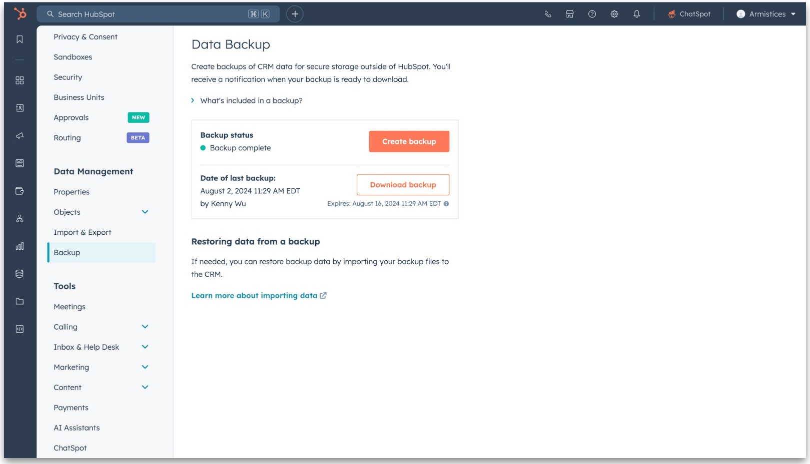
## Use Case

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

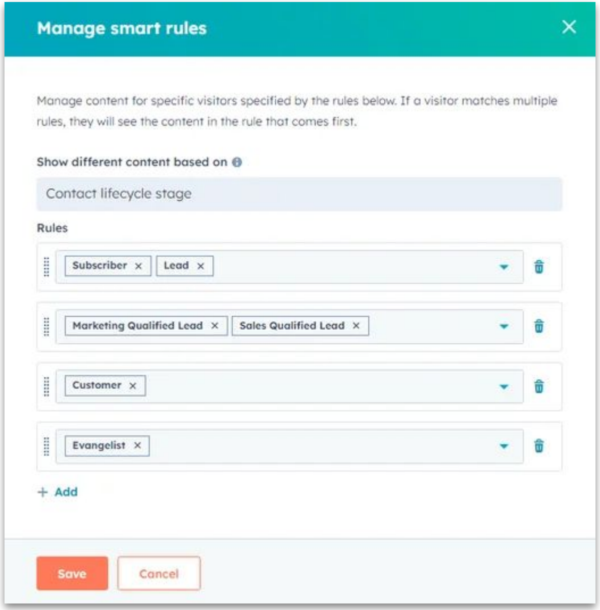



HubSpot

# 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

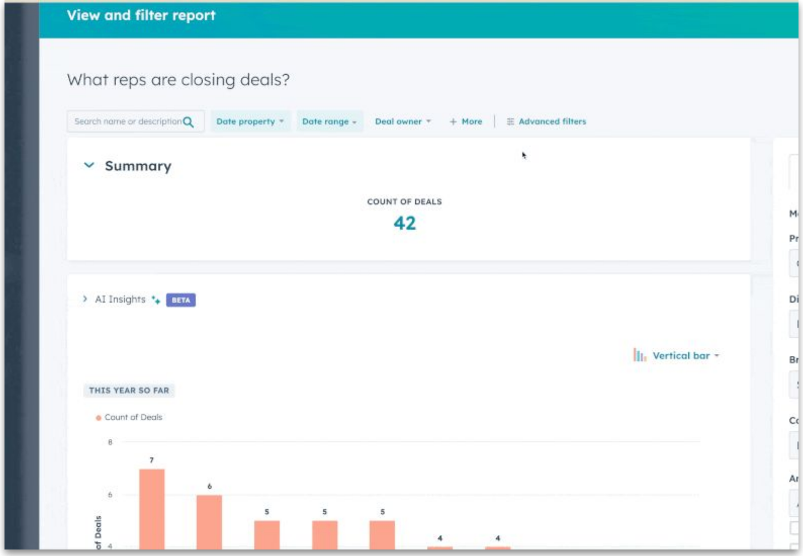
Smart Content in HubSpot has become even more powerful with the new CTA editor, allowing you to create and manage variations of your embedded assets and pop-up CTAs. You can now fine-tune your CTAs' relevance by customizing them for categories like Ad Source, Device Type, and Language.

**Launch region:** Global

Free Starter Pro Enterprise **Public Beta**

# 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 | Pro | 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.

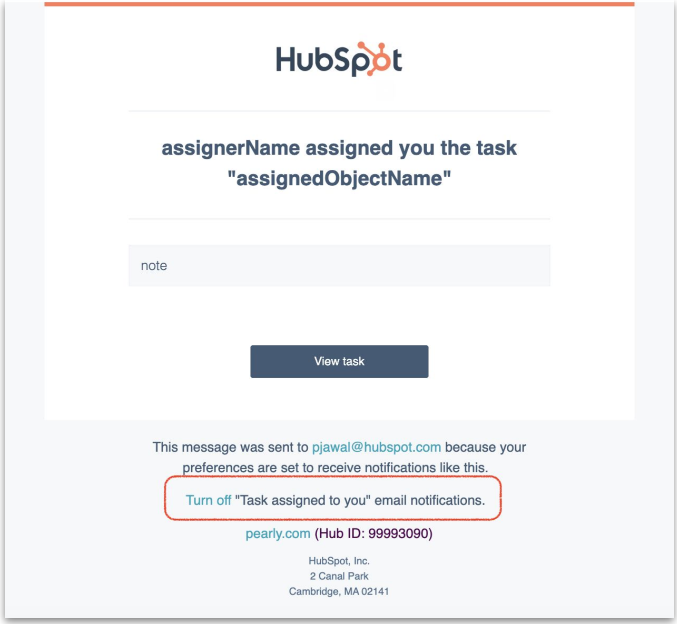
### Use Case

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

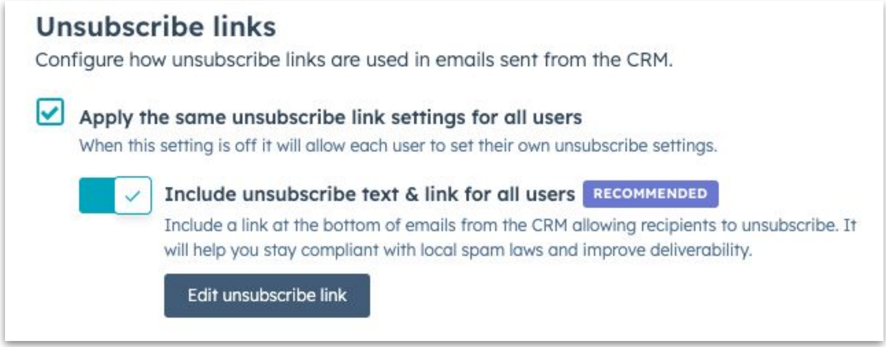
Free Starter Pro Enterprise Live



# 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**

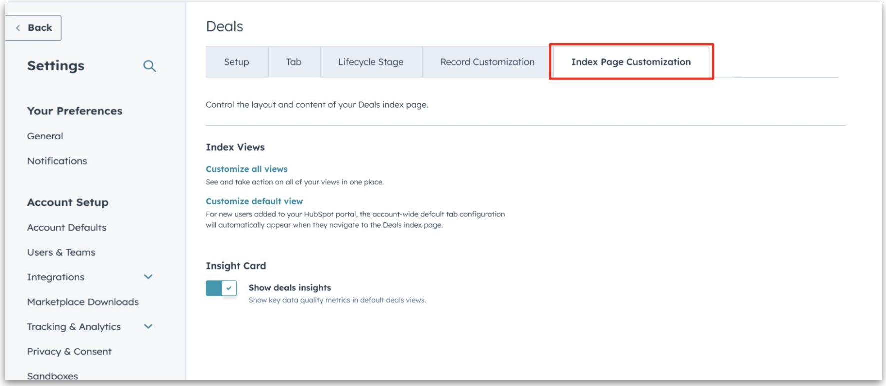
Adding unsubscribe links to emails is crucial for deliverability, and now, new portals will automatically include this feature to ensure you meet industry standards from the start. This change simplifies your onboarding process and helps you avoid potential issues down the line, setting you up for success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

**Launch region:** Global

Free Starter Pro Enterprise Live

# 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 Pro Enterprise Live

# Summarize Contacts Directly from Global Search

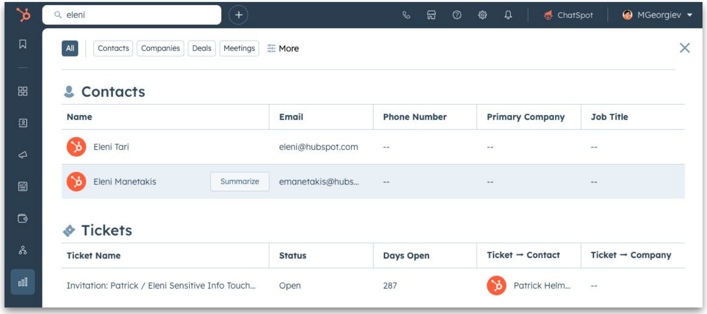
When you search for Contacts in Global Search, a new "Summarize" option appears when you hover over each row, providing a quick overview of each contact record powered by ChatSpot.

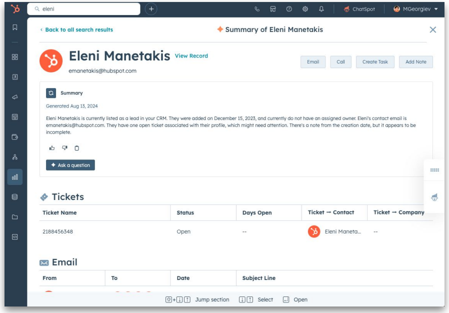
## Use Case

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

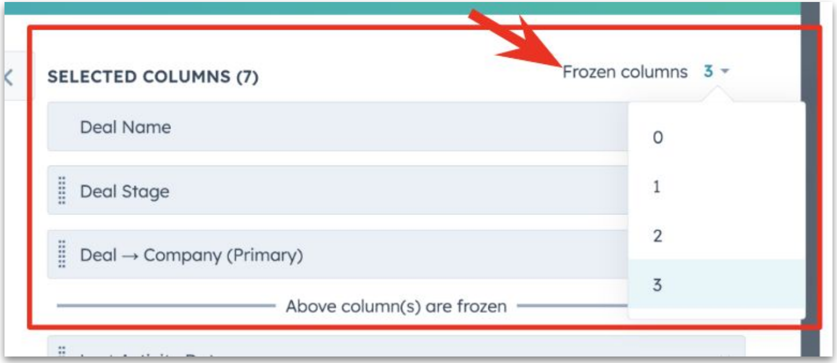
Free | Starter | Pro | Enterprise | **Public Beta**



# "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**

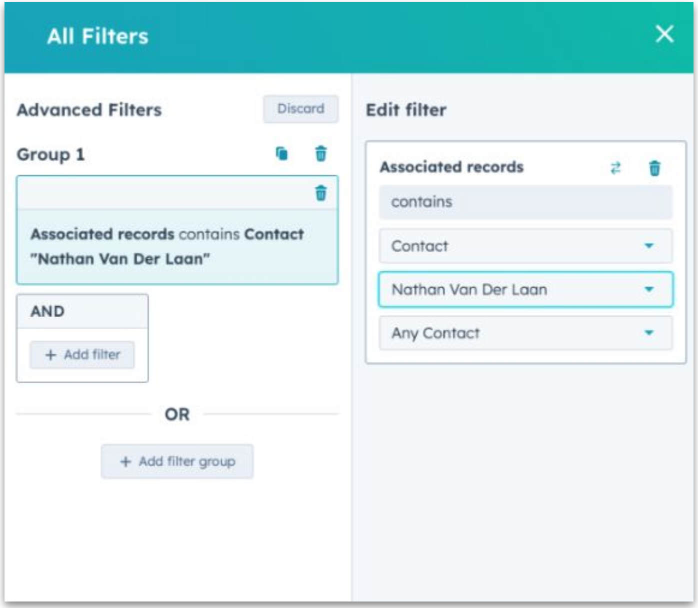
By customizing logging rules, you can reduce the occurrence of irrelevant activities appearing on records, saving your reps time and ensuring that logged activities are meaningful and aligned with their workflows. This streamlined process improves efficiency and enhances the overall user experience within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

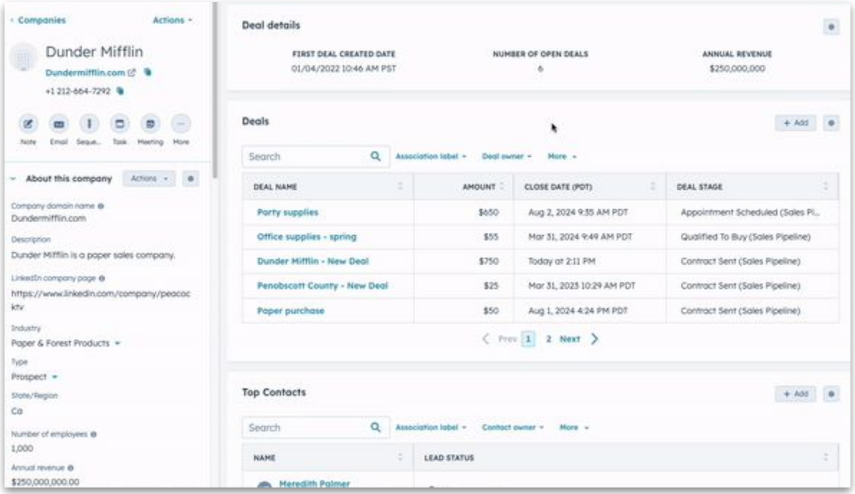
Free Starter Pro Enterprise Live

# 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.

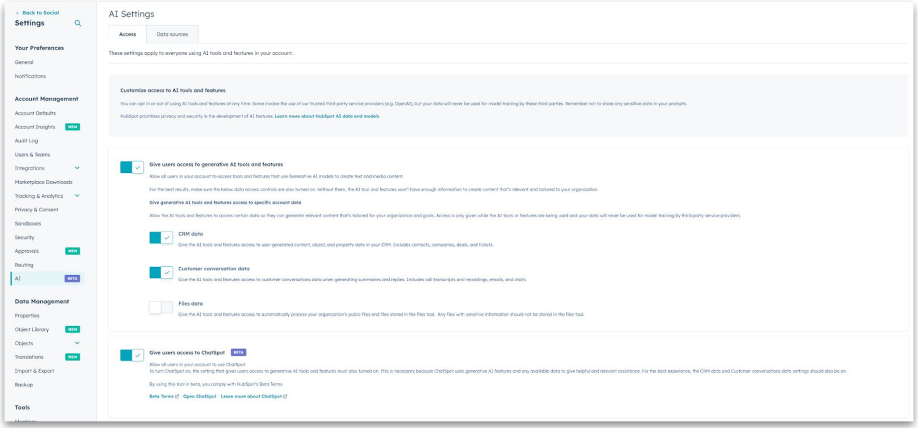



**Launch region:** Global

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

HubSpot

# 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

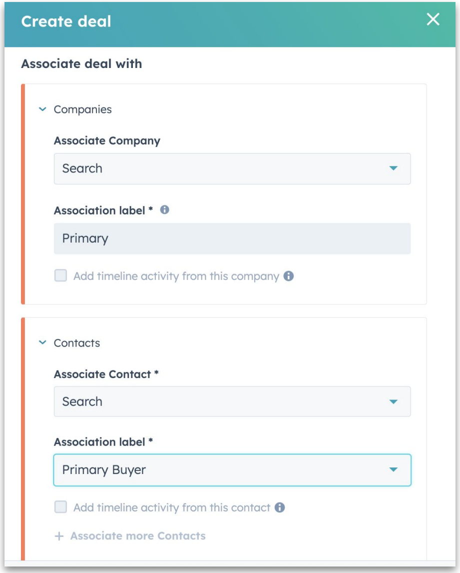
This card allows you to quickly monitor upcoming deadlines, making it easier to assess progress and determine necessary actions for activities like contract renewals. With a clear view of start dates, end dates, and the current date, you can stay on top of critical timelines and ensure timely follow-ups.

**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**

# 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**

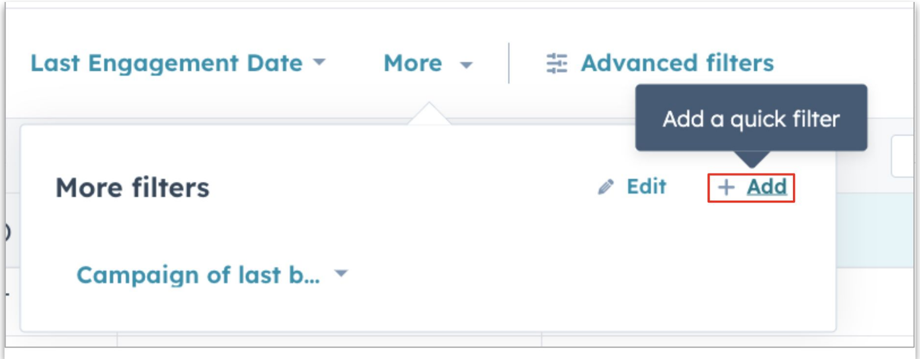
With the ability to adjust filters and columns across all views, you can ensure that your team has access to the most relevant data and insights. This streamlines data management and helps improve overall efficiency in your reporting processes.

**Launch region:** Global

Free | Starter | Pro | 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

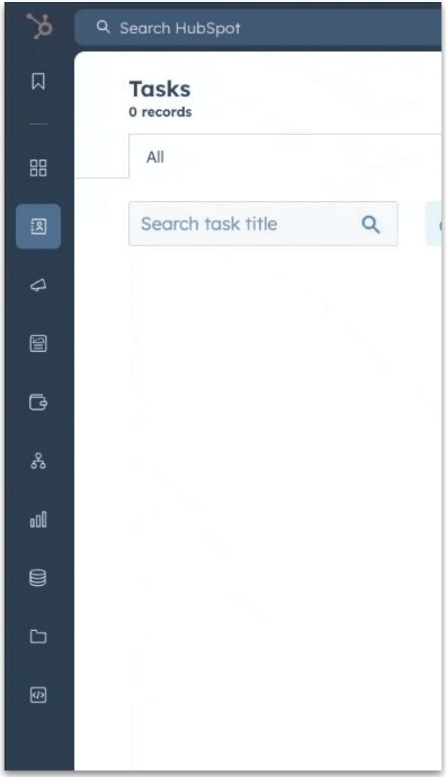
The global navigation UI has been enhanced to improve efficiency and usability by reducing clicks, decreasing mouse movement, and adjusting sensitivity to prevent accidental openings.

**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.

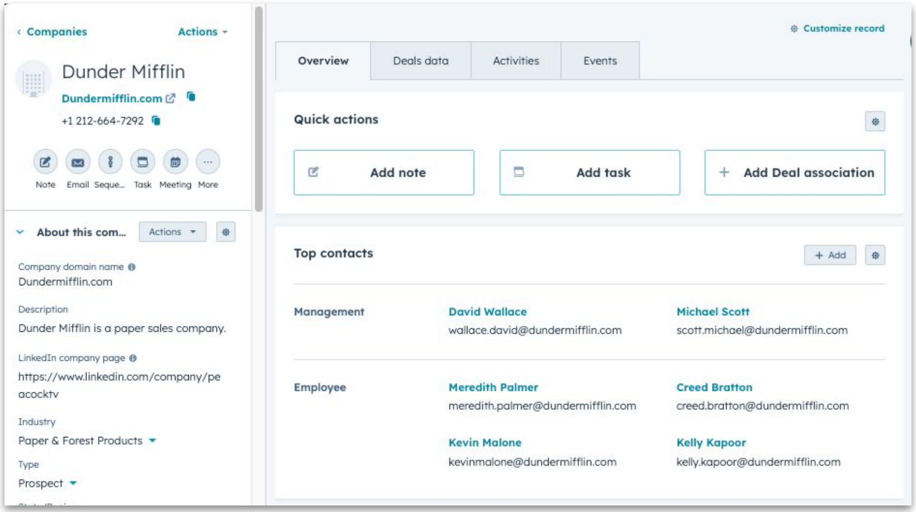
**Launch region:** Global

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

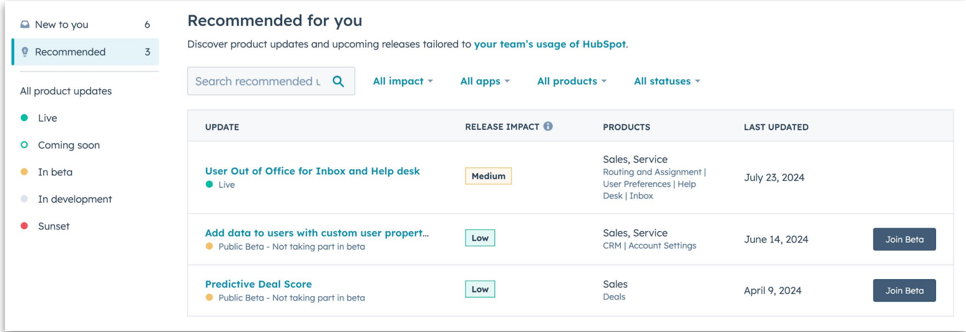
Free Starter Pro Enterprise Live

# 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

Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

# Orders and Cart object Enhancements

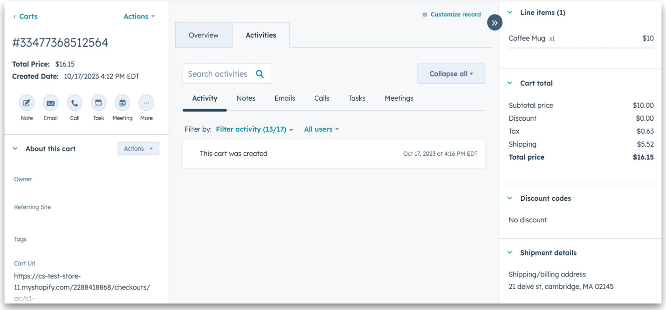
New features for carts and orders in HubSpot include record pages for these objects, association cards to view related orders and carts on record pages like deals and contacts, and enhanced object data management accessible from the settings tab.

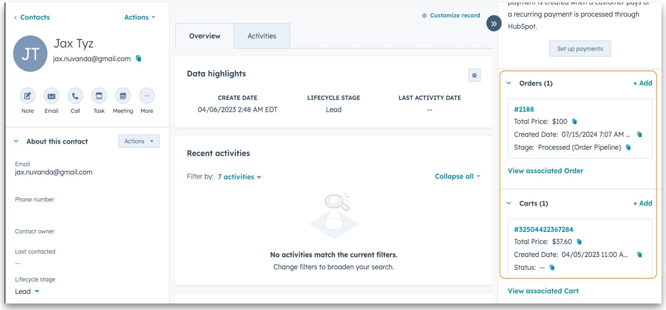
## Use Case

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

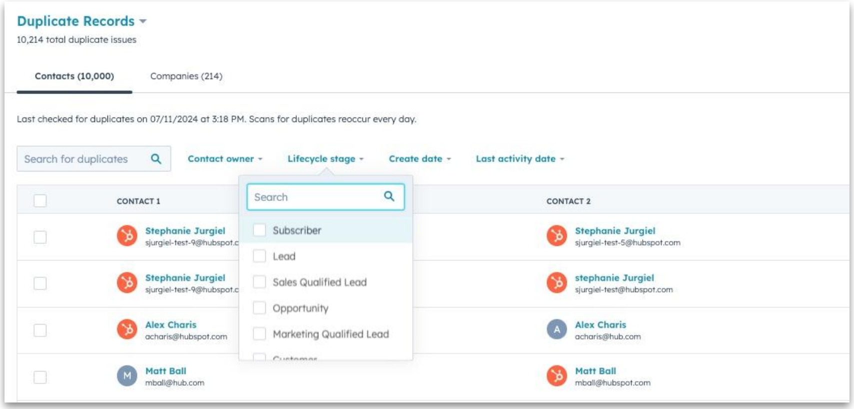
Free Starter Pro Enterprise Live



# 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

Free Starter Pro Enterprise Live

Breeze™

AI Powered

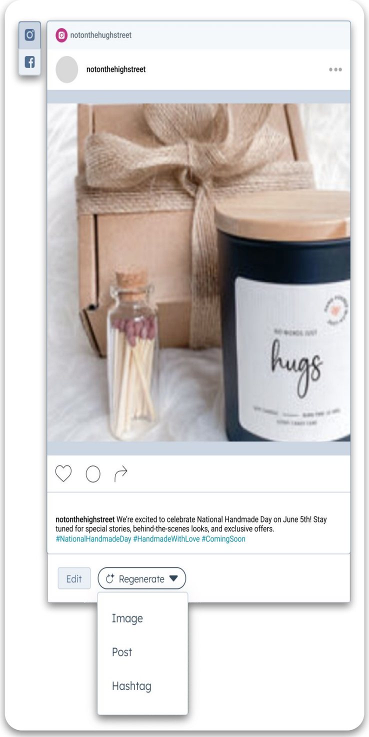
Breeze™

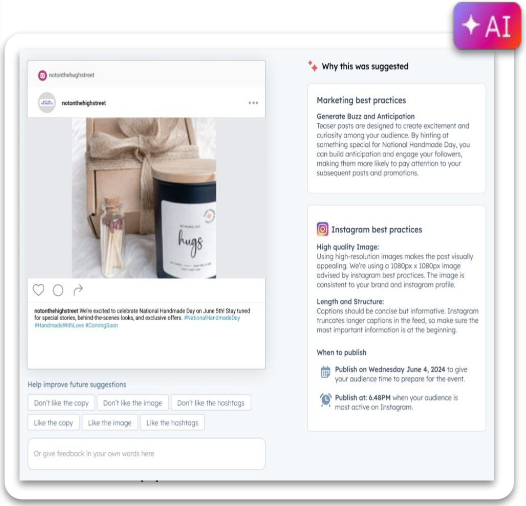
# Social Media Agent

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

Free | Starter | Pro | Enterprise | Private Beta

HubSpot

Breeze™

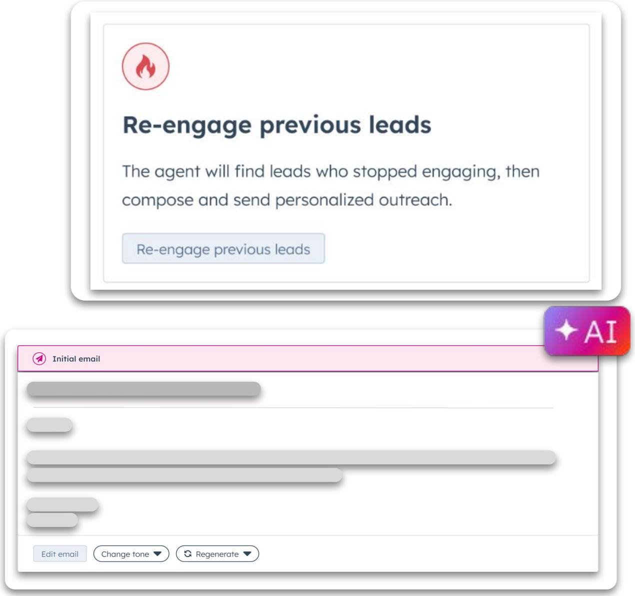
# Prospecting Agent

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

Breeze™

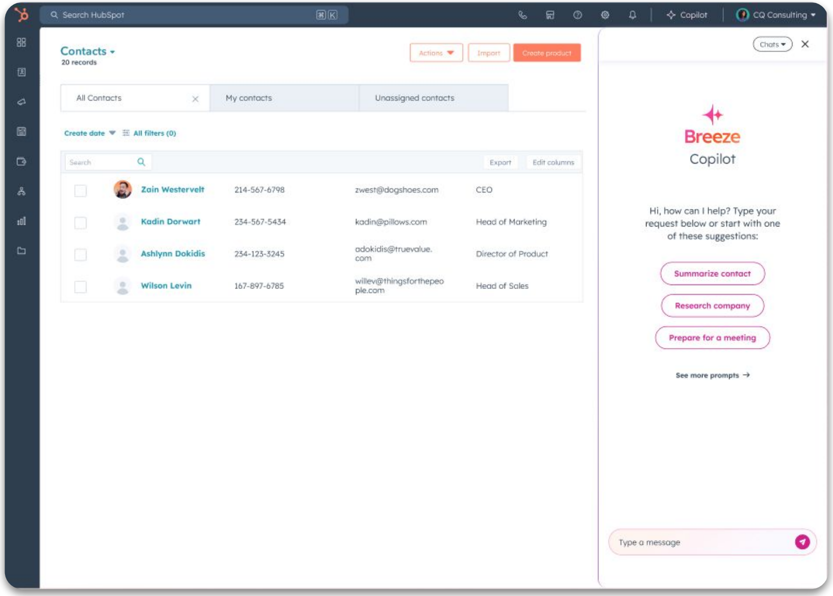
# Copilot

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

Free | Starter | Pro | Enterprise | Public Beta

HubSpot

Breeze™

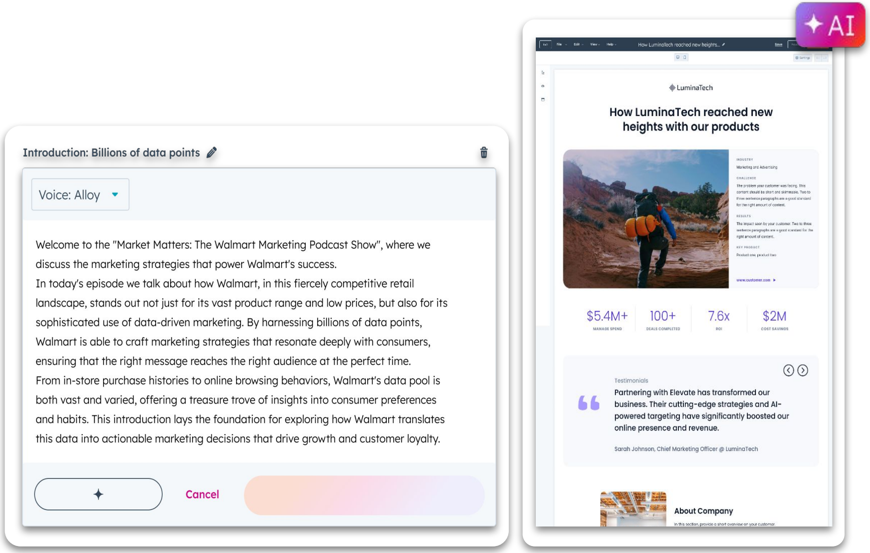
# Content Agent

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

Free | Starter | Pro | Enterprise | Public Beta

HubSpot

Breeze™

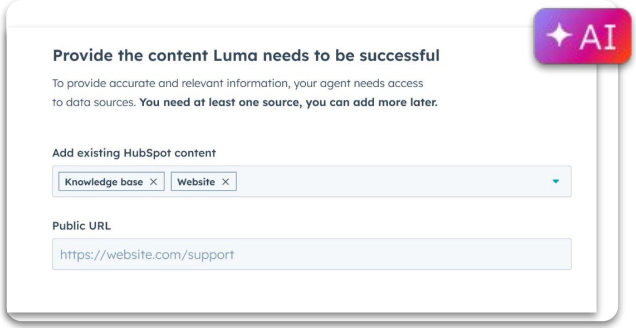
# Customer Agent

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 Starter Pro Enterprise Live

HubSpot

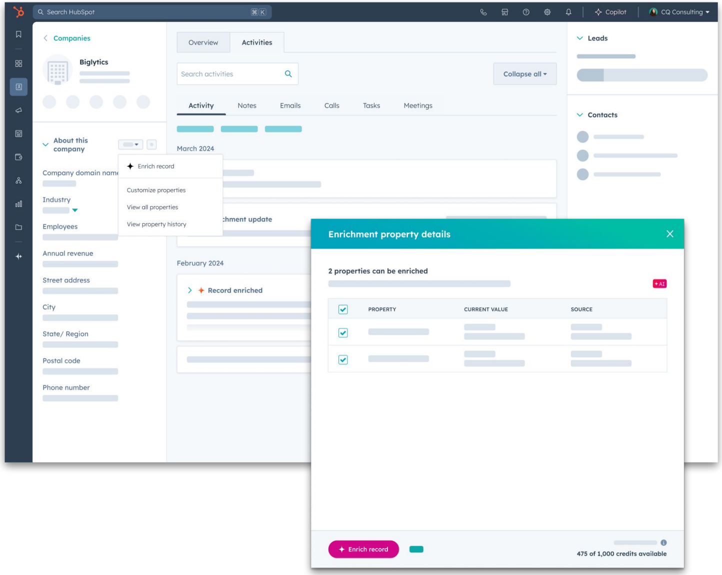
Breeze™ Intelligence

# 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

Free Starter Pro Enterprise Public Beta

IN 24

Data Enrichment

# 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.

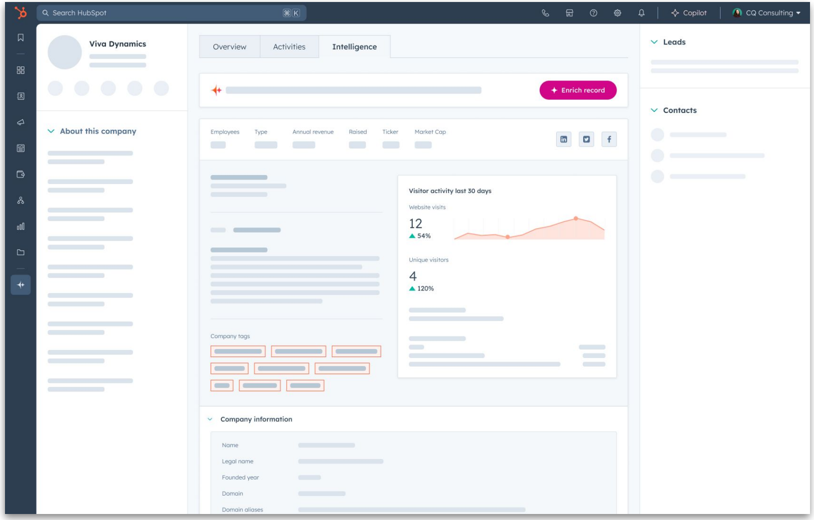
Breeze™ Intelligence

# 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 and conveniently understand the visit activity and data hygiene of any company in your CRM directly within the company record.




**Launch region:** Global

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HubSpot

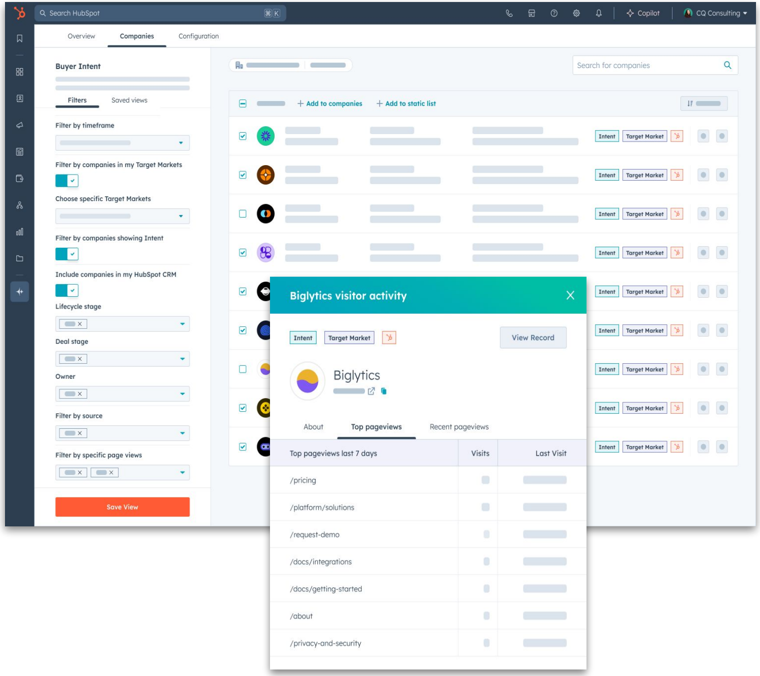
Breeze™ Intelligence

# 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

Free | Starter | Pro | Enterprise | **Public Beta**

HubSpot

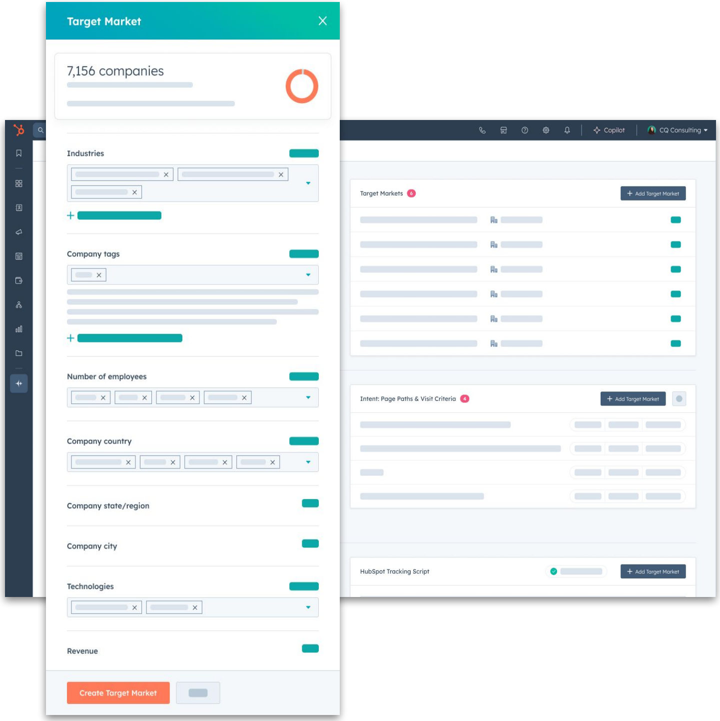
Breeze™
Intelligence

# 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

Free Starter Pro Enterprise **Public Beta**

HubSpot

Breeze™ Intelligence

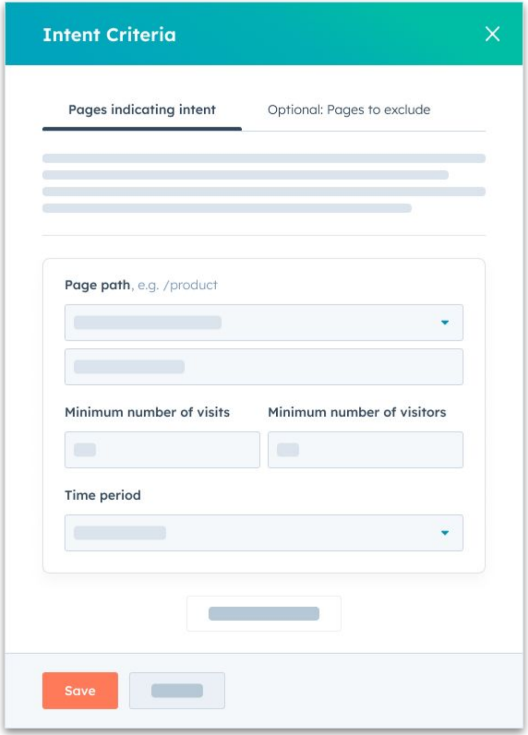
# Set Intent Criteria

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

Free | Starter | Pro | Enterprise | **Public Beta**




HubSpot

Breeze™ Intelligence

# Company Keywords

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

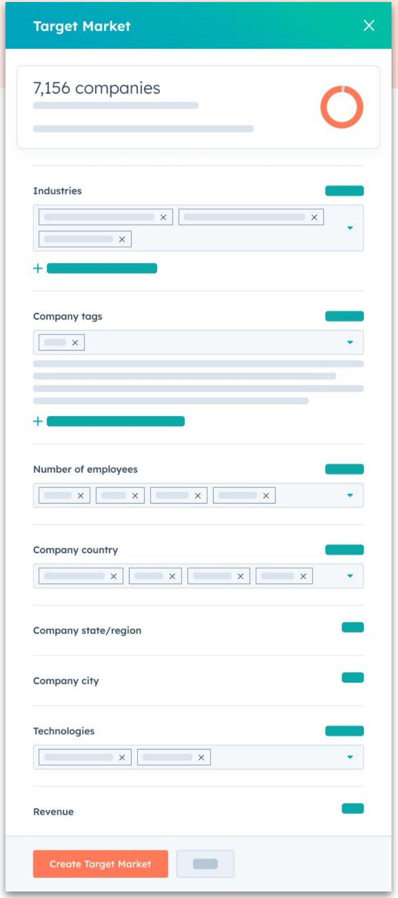
**Use Case**

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 | Pro | Enterprise | **Public Beta**




HubSpot

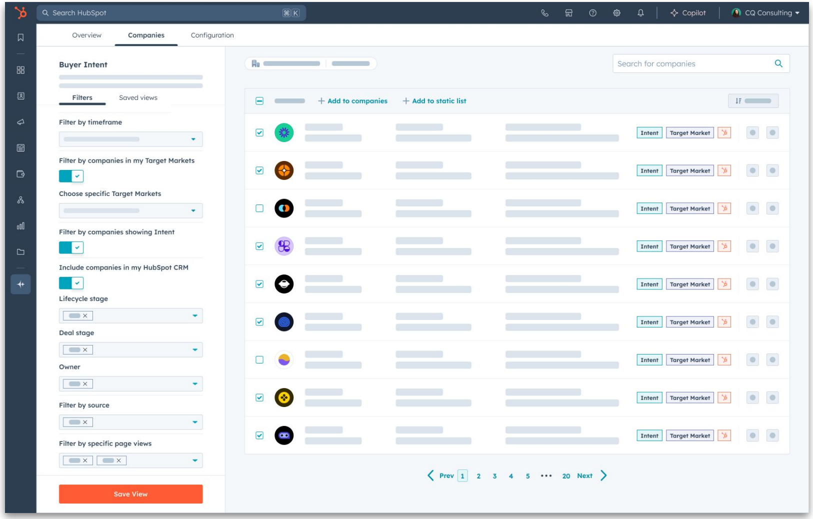
Breeze™
Intelligence

# 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

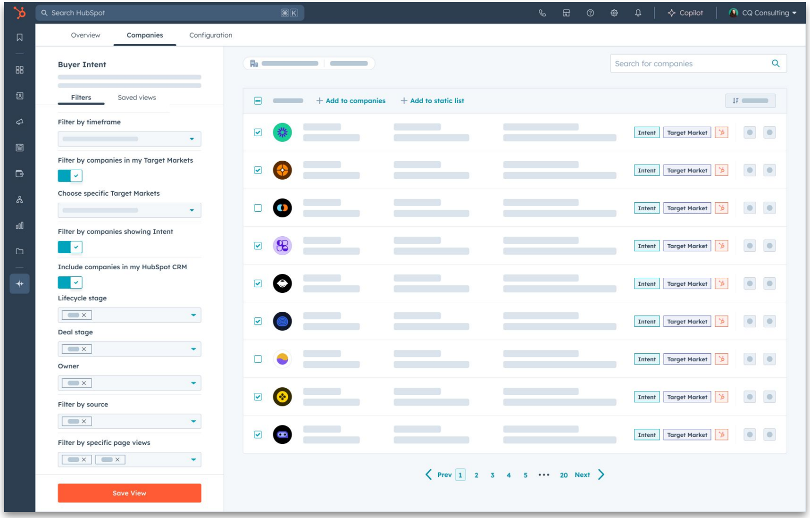
Free Starter Pro Enterprise **Public Beta**

HubSpot

Breeze™ Intelligence

# 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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HubSpot

Breeze™ Intelligence

# Form Shortening

Capture more leads without sacrificing data.

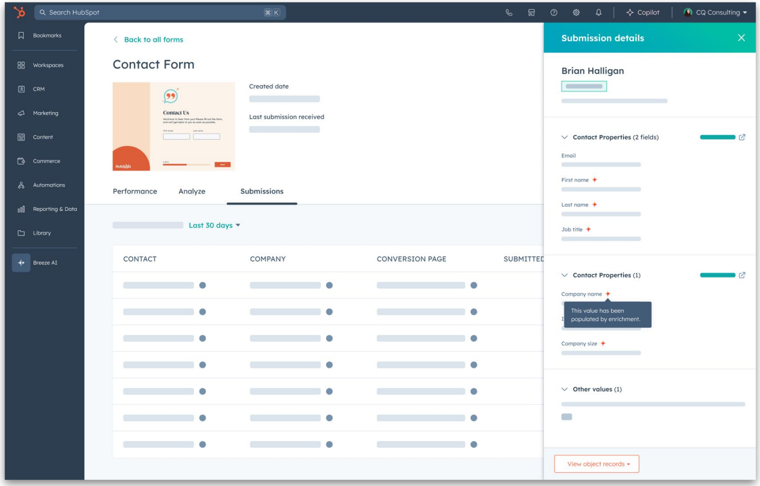
## Use Case

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

Free | Starter | Pro | Enterprise | **Public Beta**




HubSpot

# 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. |
| • Recurring<br>• Limit term is monthly<br>• CTU mechanics for overages<br>• No re-enrichment | • Recurring<br>• Limit term is monthly<br>• CTU mechanics for overages<br>• Free re-enrichment | • Recurring<br>• Limit term is monthly<br>• CTU mechanics for overages<br>• Free re-enrichment | • Backfills all contacts and companies, up to 1 million records<br>• Executes immediately upon purchase<br>• Assisted purchase only<br>• One time only per portal |

# Feature Comparison

| | Breeze Intelligence | ZoomInfo | Apollo | 6Sense | Cognism | Clay | Lusha | LeadFeeder |
|---|---|---|---|---|---|---|---|---|
| Data Enrichment | ✅ | ✅ | ✅ | ✅ | ✅ | ✅ | ✅ | ✅ |
| Buyer Intent | ✅ | ✅ | ✅ | ✅ | ✅ | ✅ | ✅ | ✅ |
| Form Shortening | ✅ | ✅ | ✅ | ✅ | ❌ | ❌ | ❌ | ❌ |
| Powered by Smart CRM? | ✅ | ❌ | ❌ | ❌ | ❌ | ❌ | ❌ | ❌ |

# Thank You