May 2024 Product Updates

Marketing Hub™

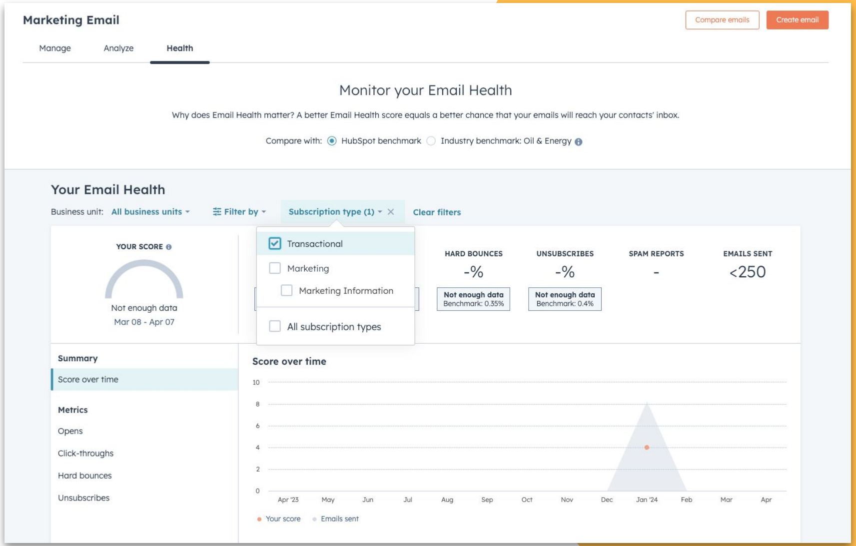
Marketing Hub™

Transactional Email Filter in Email Health

The Subscription type filter on the Email Health tab allows users to view the email health of only their transactional or marketing email subscription types.

Use Case

More granular email health filters allow users to further and gather new insights into email health. Users can now gather new insights into the overall health of their transactional emails.



Free Starter Pro Ent Live

Launch region: Global

Marketing Hub™

New Campaigns Limits

We have increased the Campaigns limit, allowing you and your teams to manage even more campaigns.

You can now scale your marketing efforts without being tied to a maximum limit of 1,000 campaigns.

Use Case

The new limit differs by Marketing Hub tier:

- Marketing Hub Professional users can now create and manage up to 5,000 campaigns
- Marketing Hub Enterprise users can now create and manage up to 10,000 campaigns

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Launch region: Global

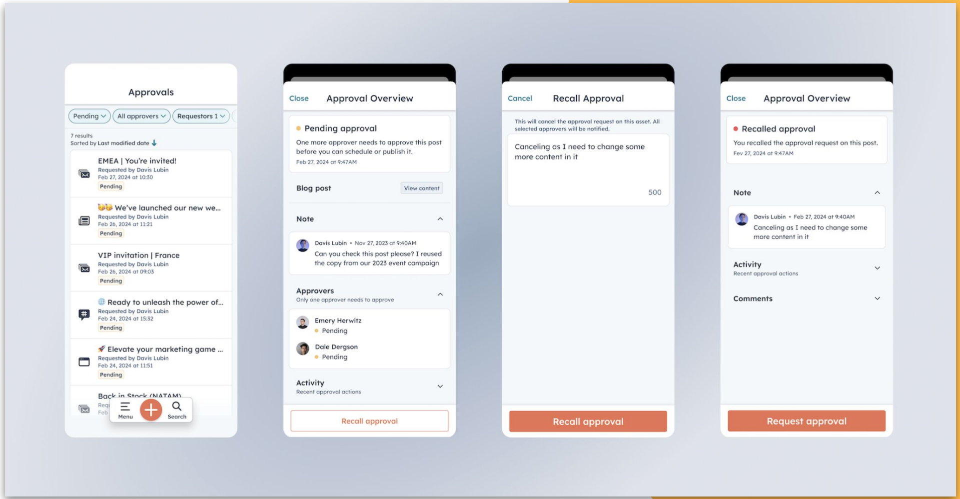
Marketing Hub™

Manage your Approvals on Mobile

Marketers can now manage their approvals in one place. All approvals are visible and centralised, to make the approval process faster and easier, for the requestor and the approver.

Use Case

With Approvals on mobile, this process is centralised and streamlined, making collaboration among marketers significantly easier and reducing the time from content creation to publication.



[Learn More]

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Launch region: Global

Marketing Hub™

New Ads Attribution Filters

HubSpot users now have access to 4 new refreshed ads attribution filters that paint a clearer picture of their contacts' journeys.

Use Case

Viewing the full funnel ROI of advertising campaigns is one of the best parts of the Ads tool. We currently provide ad tracking allowing you to see which customers have an ad interaction on their contact record. We combine this data with analytics data to provide attribution filters that showcase the journey which their contacts took when interacting with your ads. We have completely overhauled our attribution system to make our data faster and our attribution filters easier to understand.

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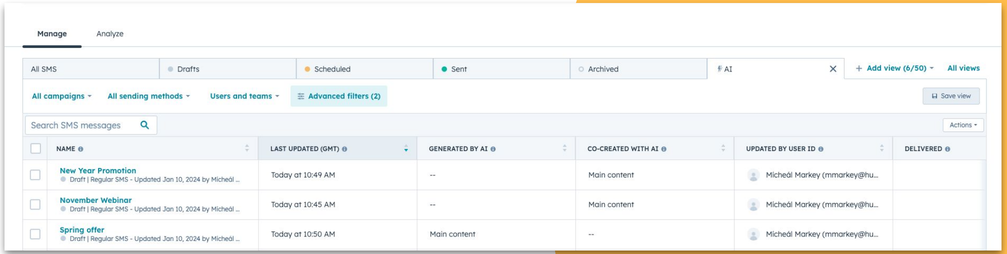
Launch region: Global

Marketing Hub™

AI view and filter available on the SMS Manage page

We are excited to announce the addition of an AI filter and AI view to the SMS manage page. Marketers can now filter and manage their messages based on the AI assistance provided in their SMS content.



Use Case

The new AI view and filter will allow marketers to see quickly view, filter and access their SMS messages that were generated or assisted by AI.

Learn More

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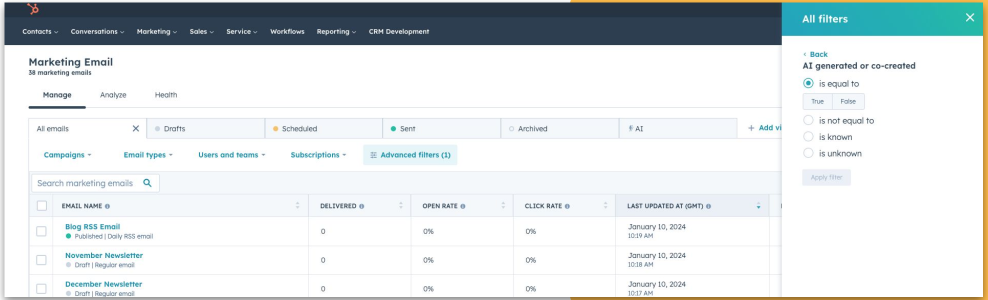
Launch region: Global

HubSpot

Marketing Hub™

AI view and filter available on the Marketing Email Manage page

We are excited to announce the addition of an AI filter and AI view to the Marketing Email manage page. Marketers can now filter and manage their emails based on the AI assistance provided in their Email content.



Use Case

The new AI view and filter will allow marketers to see quickly view, filter and access their Marketing Emails that were generated or assisted by AI.

[Learn More]

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Launch region: Global

HubSpot

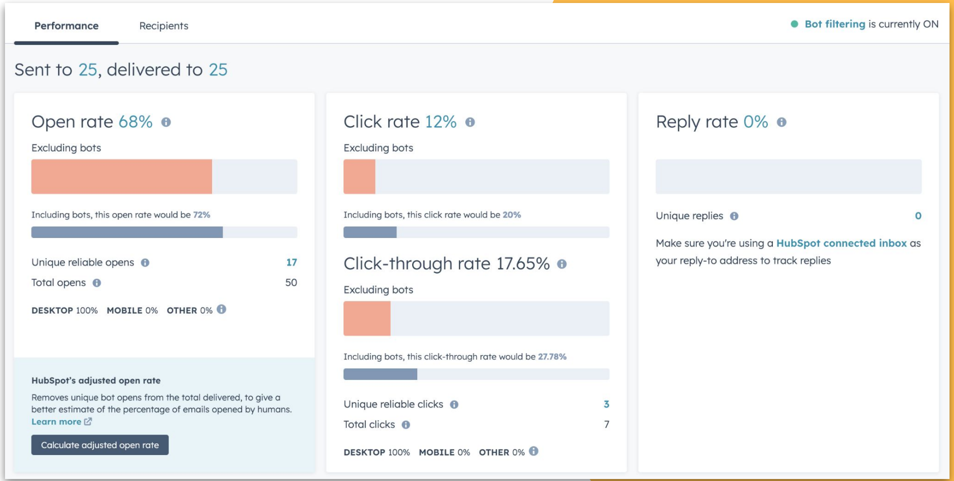
Marketing Hub™

Email - New Bot Open & Click Rate

We are adding visibility on bot-included engagement Rates. On the email post-send page, HubSpot will now show open and click rates which both include and exclude recognizable bots. The bot-included rates may be similar to what some customers see in other marketing softwares which do not use bot filtering at all.

Use Case

This helps provide a more reliable view of human interaction with your emails. Our customers will now have a comparative view between bot-included and excluded rates helping measure the real state of their email campaigns.



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Launch region: Global

Marketing Hub™

SMS Available on Marketing Calendar

It is now possible to view your scheduled and published SMS alongside other marketing assets on the Marketing Calendar.

Use Case

The inclusion of SMS messages on the Marketing Calendar enhances the overall visibility and alignment within marketing teams. By consolidating SMS alongside other marketing channels, users can gain a comprehensive view of all scheduled activities, messaging strategies, and campaign schedules in a single unified calendar view. This update enables marketers to assess and coordinate their multi-channel marketing efforts more effectively, ensuring that they have a holistic view of their marketing activities and can better optimize scheduling and messaging across all communication channels.

[Learn More]

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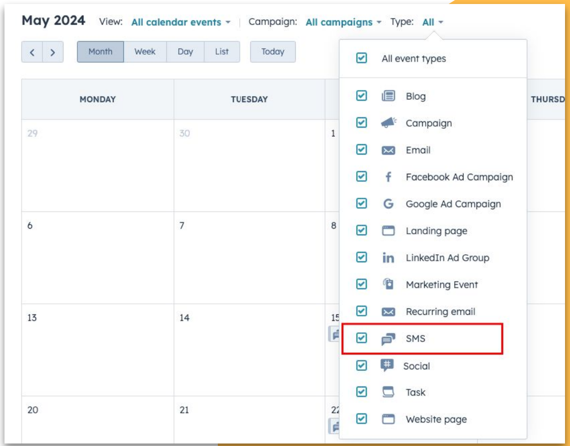
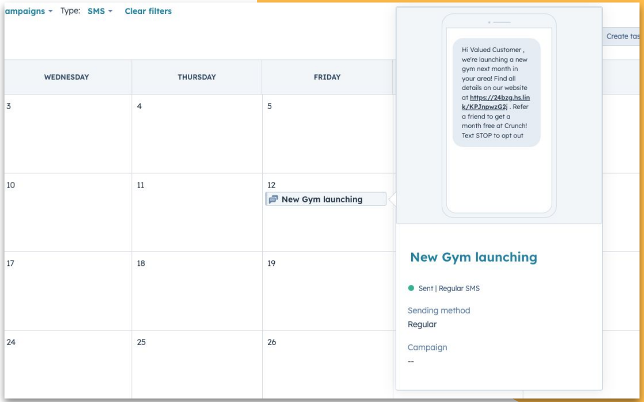


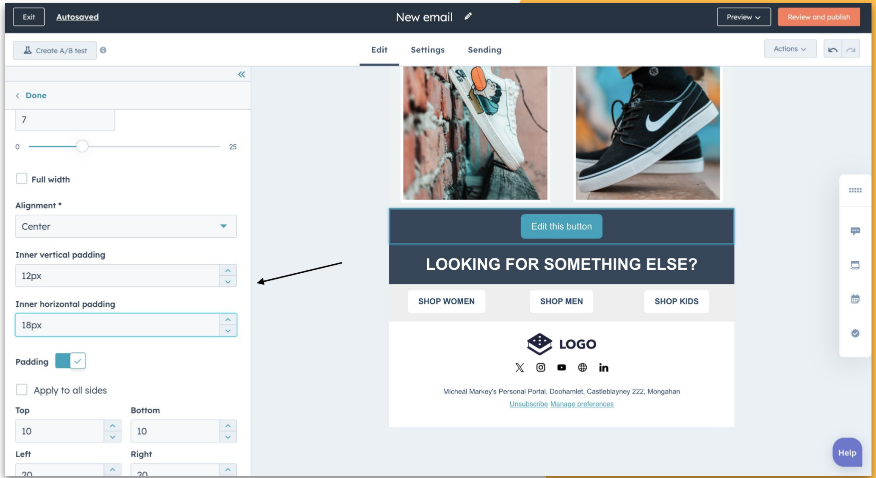


HubSpot

Marketing Hub™

Improved Button Padding in Email

The new inner and horizontal padding options in the Email Editor will allow users to further customise the appearance of the button in their Marketing Email.



Use Case

Styling your Marketing Emails' button is crucial for enhancing visual appeal and readability. Adequate padding ensures buttons are easily clickable and leads to a better and more accessible recipient experience and higher engagement rates.

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Launch region: Global

Content Hub™

Content Hub™

Create folders and organize your files from Mobile on iOS

HubSpot Files on mobile iOS allows users to easily manage and share files from their iOS smartphones. Users can upload, download, and organize files in one place, bringing convenience and efficiency to file management tasks on the go.

Use Case

You will be able to upload photos and videos from your phone library and camera and documents. All files uploaded will be set up by default as Public, but then you will be able to change the file visibility and set it as Public, Public- no index and Private.

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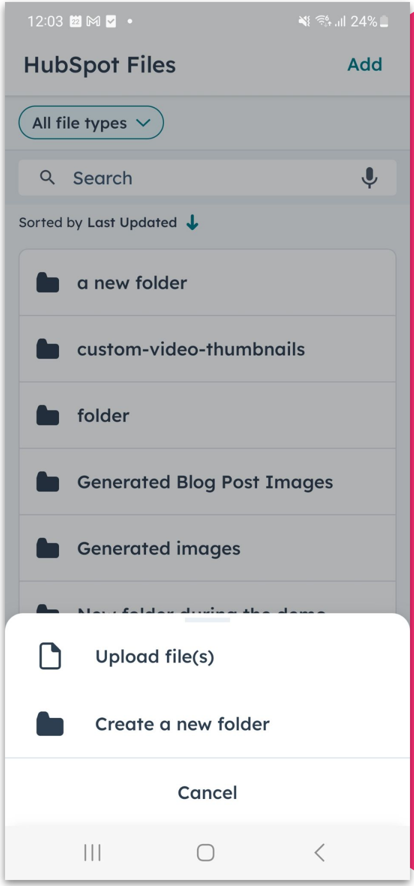
Launch region: Global



Marketing Hub™ + Content Hub™

Marketing Hub™ + Content Hub™

Content Approvals Rating Criteria

Content approvals are one of the best ways to ensure that HubSpot admins are appropriately managing risk in their accounts, as they require sign off from other users before content is published to the web. The Security Health Check will now evaluate whether an account has approvals enabled for the content types that it has access to, including Blog Posts, Landing Pages, Website Pages, and Marketing Email. If not, admins can easily enable approvals for these tools as needed to improve their account's security posture.

Use Case

The Security Health app now encourages users to enable Approvals for content as a security and governance measure.

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

Launch region: Global

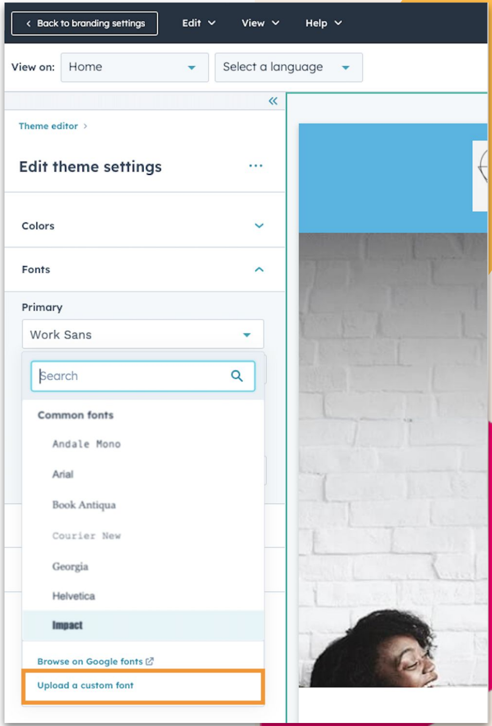
Marketing Hub™ + Content Hub™

Custom Fonts Now Supported in New CTAs

You can now upload and use custom fonts within new CTAs.

Use Case

This update restores the popular custom font capabilities of legacy CTAs, bringing the same option to the improved CTA editor.



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Launch region: Global

Marketing Hub™ + Content Hub™

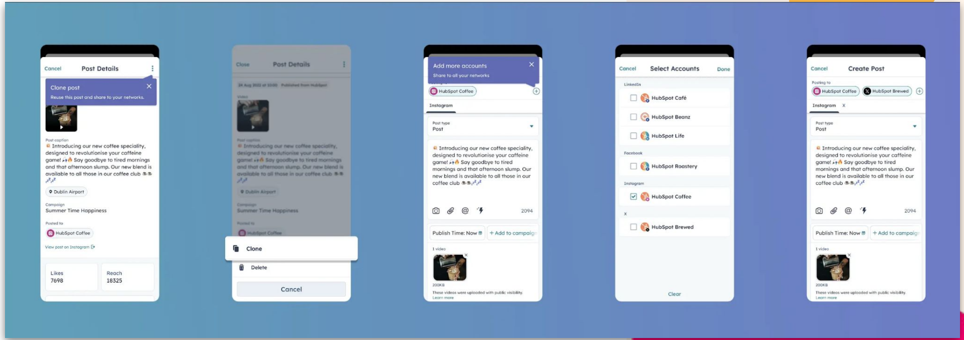
Clone your Social Posts on Android

Marketers can access their Social Posts at any stage (draft/schedules/published) and clone them. This feature will work for posts created and published through the HubSpot Social tool.

Enabling the clone option allows marketers to create their posts including visual content such as images and videos faster on the go.

Use Case

Marketers can now win time and be more efficient with the new cloning capability enabled for their social posts from their Android smartphones.



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Launch region: Global

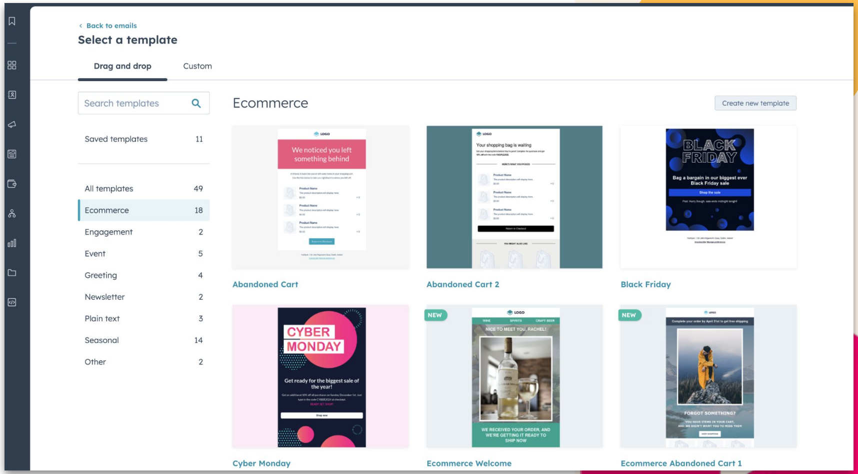
Marketing Hub™ + Content Hub™

New Email Template Selection Page & E-Commerce Templates

The redesign of the Marketing Email Template Selection Page improves segregation of native templates, and comes with five brand new Ecommerce templates.

Use Case

The refreshed Marketing Email Template Selection Page organises HubSpot provided templates by email intent, allowing users to quickly find a template that suits their needs. As part of the redesign launch, five new Ecommerce templates are available to choose from.



Free Starter Pro Ent Public Beta

Launch region: Global

Sales Hub™

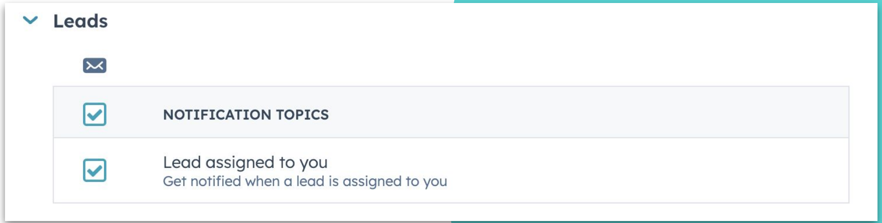
Sales Hub™

Assigned Lead Notifications

Sales reps can now receive email and in-app notifications when a new leads is assigned to them!

Use Case

In sales, we know speed to lead is key and sales reps want to action leads as quickly as possible. Now they can receive in-app and email notifications when a lead is assigned to them.



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

Launch region: Global

Sales Hub™

Leads - Public API

Hubspot's CRM object API now allows you to create and manage lead records in your HubSpot portal, as well as sync lead HubSpot's data between HubSpot and other systems.

Use Case

Many sales organizations rely on HubSpot's robust objects APIs in order to facilitate their businesses processes. Now organizations will be able to create and assign leads in mass for their organizations, update records in bulk, and leverage rich lead data in other systems.

Learn More

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

Launch region: Global

Sales Hub™

Display Labels for Quotes

When creating a customized quote template, we support the addition of personalization tokens, which show data from an object associated with the quote. Previously, for any custom enumeration property, the final quote would show the internal value associated with a given enumeration type property.

Beginning May 21, 2024, we deployed a fix to show the label value on newly published quotes instead of the internal value. During this rollout, we discovered that the fix adversely affected some templates.

We have paused the rollout until August, 21, 2024. If your template was affected by this change and you need time to update it, please submit this form, and we will temporarily revert your account to the previous functionality.

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Launch region: Global

Sales Hub™

Deal Split API

The new Deal Split API will enable customers to read and write deal splits with their respective percentages via API.

Use Case

In many businesses, deals are owned by multiple reps and, if won, the commission is split between the deal owners. It's important for teams to represent that shared deal ownership in HubSpot, including the percentage of commission each rep claims. Customers who are managing some of their deals or forecasting outside of HubSpot want to represent their deal split percentages inside of HubSpot and vice versa. Until now, it was not possible to read or write deal split data via API, leading to data that was incomplete and out of sync across their tech stack. With these changes, customers can have a single source of truth that ensures all of their data is up to date.

Learn More

Free Starter Pro Ent Live

Launch region: Global

Service Hub™

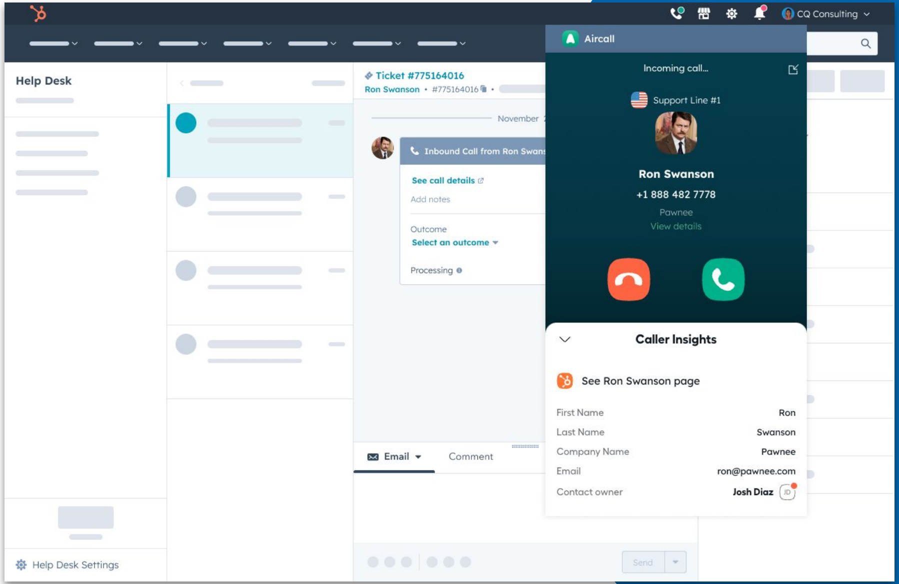
Service Hub™

Calling Apps in Help Desk

With Calling apps in the Help Desk, you can connect your existing calling integration phone lines to the HubSpot Help Desk, directing inbound calls to a group of reps or teams. Inbound calls will ring your selected users or teams simultaneously, creating a new ticket in the connected pipeline. This new calling connection is currently available with the Aircall calling app, other apps are coming soon.

Use Case

This new feature update enhances the omni-channel capabilities by introducing Calling Apps. Connecting your existing calling integration to Help Desk allows users to harness the power of a workspace, accessing the below benefits:



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Launch region: Global

Service Hub™

The New Memberships App for Service Content

We're simplifying the complex process of creating and managing private content by consolidating the tasks into the "Memberships" application. This transition to a new access management feature named "Access Groups" streamlines the creation of static and dynamic groups, providing a more centralized and efficient approach.

Use Case

The new "Memberships" application offers users a unified platform to efficiently manage access groups and private content, eliminating the need to navigate through multiple applications. With the introduction of "Access Groups", featuring static and dynamic group options, users can easily control group membership based on their specific criteria

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

Launch region: Global

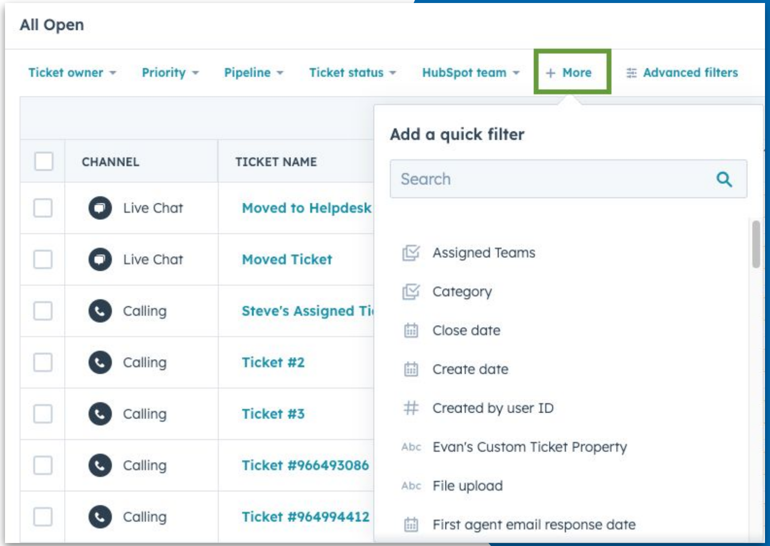
Service Hub™

Customizable Quick Filters in Help Desk

The help desk ticket list quick filters are now customizable! Select up to 5 additional ticket properties to be added to the quick filter bar.

Use Case

With this update, agents now have the flexibility to select up to 5 additional filters of their choice. This enhancement provides agents with easier access to the filters they prefer, streamlining the filtering process so that agents can get to the right tickets even faster.



**Service Seat required*

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Launch region: Global

Service Hub™

Connect HubSpot tickets to Slack and sync replies

The thread toolbar and preview cards in the Conversations Inbox are getting a refresh! The changes we are making focus on foregrounding important ticket and conversation information, making it easier for users to quickly gather context and update key properties like owner, status, and ticket priority.

Use Case

You can configure a connection between your help desk and Slack that comes with out-of-the-box notifications about new tickets (no need to create specific workflows for this) to specific channels, an embedded action to update the ticket from Slack, and the ability to sync ticket comments with Slack threads replies for better collaboration and better customer service.

[Learn More]

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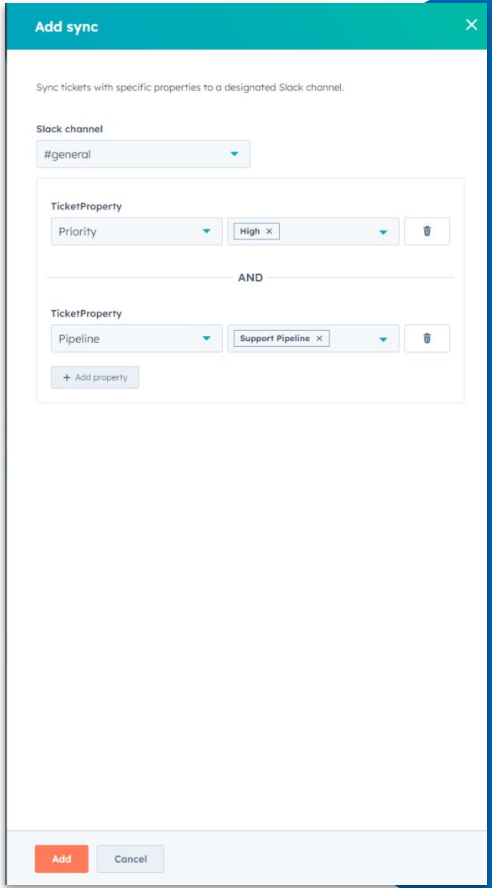
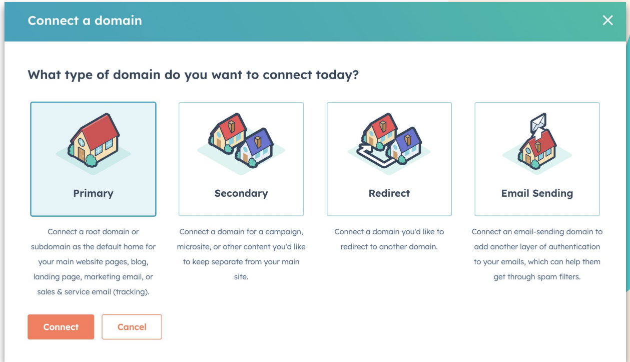


Sales Hub™ + Service Hub™

Sales Hub™ + Service Hub™

Custom Tracking Domains for Sales and Service Email

You can now connect a domain to HubSpot for the "Sales & service email (tracking)" content type. This domain will be used in the open and click tracking links generated for emails sent via personal and team emails in the CRM, or using the Track option with the Sales Extensions, as well as unsubscribe links.



Use Case

The "Sales & service email (tracking)" content type now allows users to connect a domain to HubSpot for generating open and click tracking links in emails sent via personal and team emails in the CRM, Sales Extensions, and unsubscribe links

[Learn More]

Free | Starter | Pro | Ent | Live

Launch region: Global

Sales Hub™ + Service Hub™

Forecasting with Multicurrency

Users can now set their preferred currency in the forecasting app, enabling them to view forecast data and submit manual forecasts in their currency of choice.

Use Case

This feature eliminates the hassle of viewing all data in the default company currency, making forecasting more accessible and efficient for companies dealing with multiple currencies and for sales reps who can now submit forecasts in their preferred currency without manual conversions.

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

Launch region: Global

Sales Hub™ + Service Hub™

Trigger a Workflow from a Playbook Submission

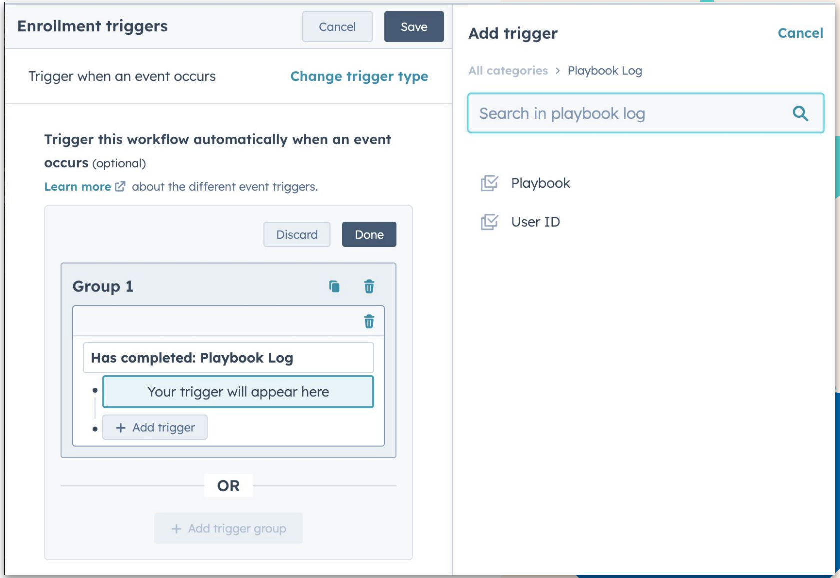
Users can now trigger a workflow associated with a specific object from a playbook submission.

Use Case

- Efficiency: Automation allows for a smoother and quicker workflow process, eliminating manual tasks and reducing the risk of delays or errors. This can save time and effort, enabling reps to focus on more strategic activities.
- Consistency: Automating workflows ensures a consistent process for handling playbook submissions, which helps reps adhere to best practices across the team.
- Task Management: Automated workflows streamline the overall workflow management process.
- Scalability: Automation allows for scaling the playbook submission process effectively as businesses grow.

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

Launch region: Global



Sales Hub™ + Service Hub™

Goals available in the Single Object Report Builder

With this release, Goals data is now available in the Single Object Report Builder.

Use Case

Users can create any Goals-based single object report through the Single Object Builder, and save the report to their report library or a dashboard.

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

Launch region: Global

Sales Hub™ + Service Hub™

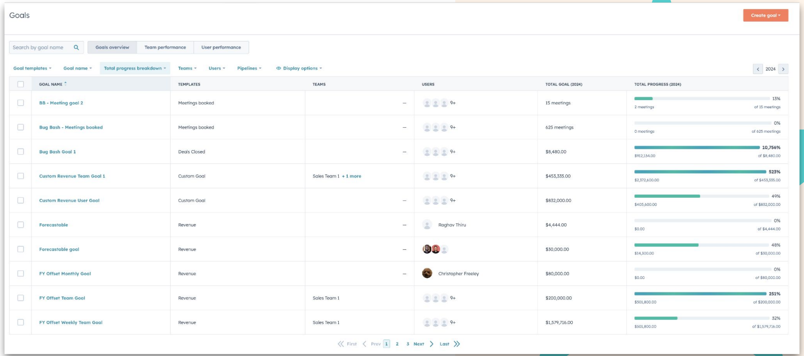
Goals Refresh: A New Manage and Measure Experience

The Goals app has been updated with a number of new features that will help users manage and measure their goals more effectively:

1. A new All Goals viewing experience
2. Transform your data: A frequency filter to view Goal targets and progress in different milestones
3. Goal performance reports available for each goal
4. A Full edit experience: change the definition, targets, or add / remove users and teams in a few clicks

These updates are available to all Goals users.

Please note some features may behave differently for Ads Goals.



Use Case

With this new release users can now see all their Goals and transform goal targets and progress data into different milestones.

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Launch region: Global

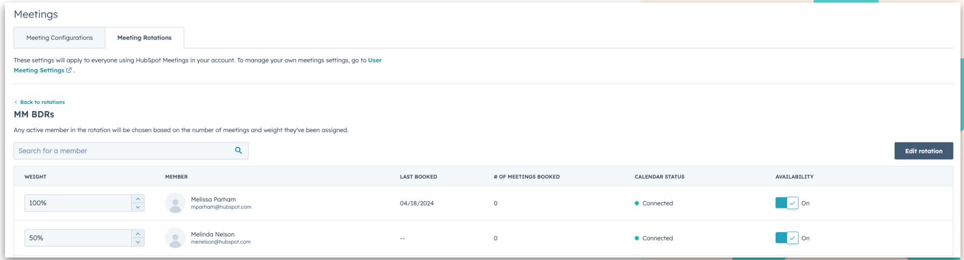
Sales Hub™ + Service Hub™

Weighted Rotation Option in Meeting Rotations

You can now create a weighted rotation for booking meetings through the CRM! Meeting rotations can be created with a weighted distribution so that you can better allocate your meetings to the right team members.

Use Case

Using a weighted distribution means that you can have some members get suggested for more meetings than other members. This could be helpful for rewarding your top performers with more opportunities or onboarding new team members by sending fewer meetings their way. This provides sales teams with more flexibility through meeting rotations, rather than only having the option of the standard even distribution that is available today.



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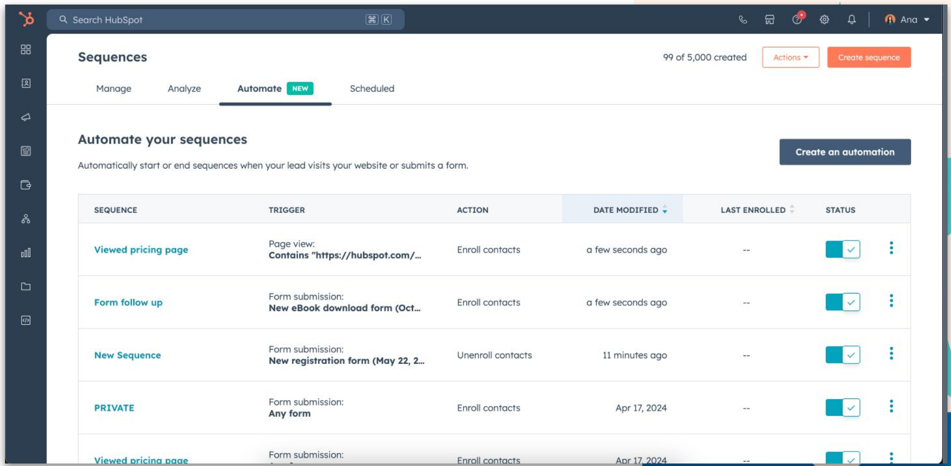
Launch region: Global

Sales Hub™ + Service Hub™

Sequences Embedded Automation

A new 'Automate' tab is being introduced to the Sequences app, enabling you to efficiently create and manage automated enrollment and unenrollment triggers directly within Sequences.



Use Case

Allowing for custom enrollment and unenrollment criteria in sequences allows customers to better automate their sales outreach to match their marketing and sales processes. This update helps sequences dynamically enroll based on marketing intent signals like submitting a form or viewing a website page.

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Launch region: Global

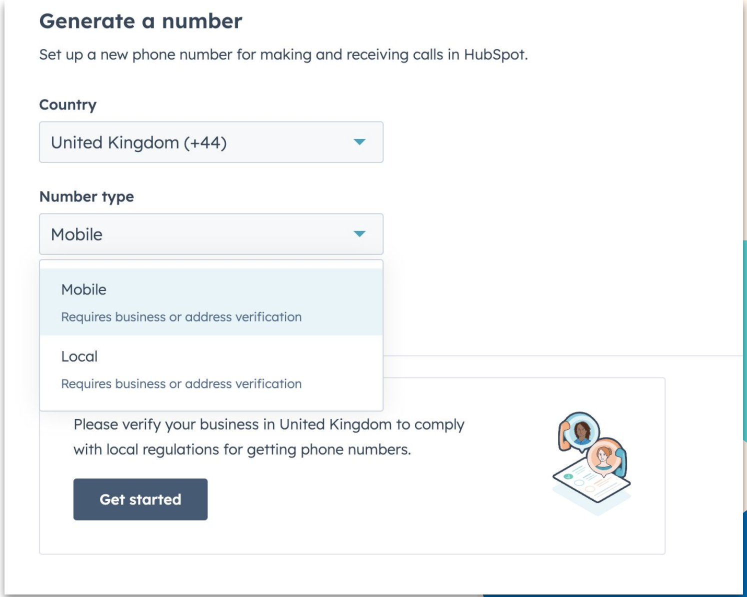
Sales Hub™ + Service Hub™

U.K. Number Acquisition Changes

Now, you can effortlessly submit the necessary regulatory documents to acquire a U.K. mobile or local number.

Use Case

Calling users with global business locations must acquire a number in their locality. In response to evolving regulatory landscapes, many countries are intensifying their enforcement of telecom regulations. This includes mandates for verifying the legitimate users of phone numbers and validating business locations. To streamline this process, HubSpot has updated the documentation flow within its platform to include U.K., allowing you to effortlessly submit the necessary regulatory documents.



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Launch region: Global

Sales Hub™ + Service Hub™

Changing display name of 'Calls' channel to 'Calling' in Ticket and Conversation properties

Previously there was a value called 'Calls' in two properties - 'Originating channel type' for tickets, and 'Source' for conversations. Ticket and Conversation properties can be used in Inbox and Help Desk Views, Reporting, and Automation, amongst other places.

Now, the display name of this value is changing to 'Calling.' You do not need to take any action. Your existing views, reports, and workflows will not break.

Use Case

Renaming these object property values creates consistency with the how the name of the Calling channel appears elsewhere in HubSpot.

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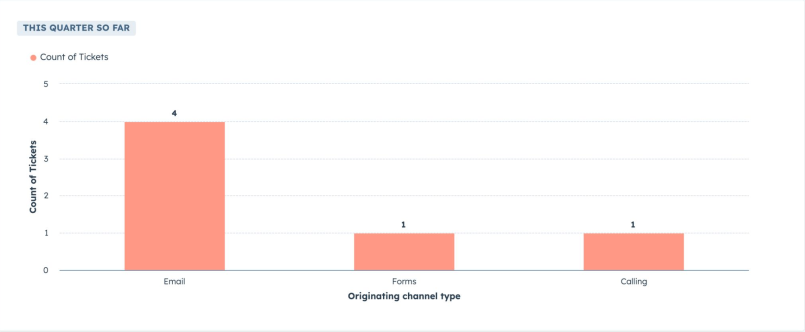
Launch region: Global



THIS QUARTER SO FAR

ORIGINATING CHANNEL TYPE	COUNT OF TICKETS
Email	4
Forms	1
Calling	1
Report Total	**6**

Sales Hub™ + Service Hub™

New UI Component: Icons

We have added an Icon component to our UI Extensions component library. Icons can enhance the usability of experiences by providing visual cues and breaking up text-heavy content. Icons add to a standard visual style and can help developers create more engaging and intuitive experiences.

Please note that Icons should ***always*** be paired with text for accessibility.

Use Case

- For visually indicating actions
- For giving guiding clues to the end-user

[Learn More]

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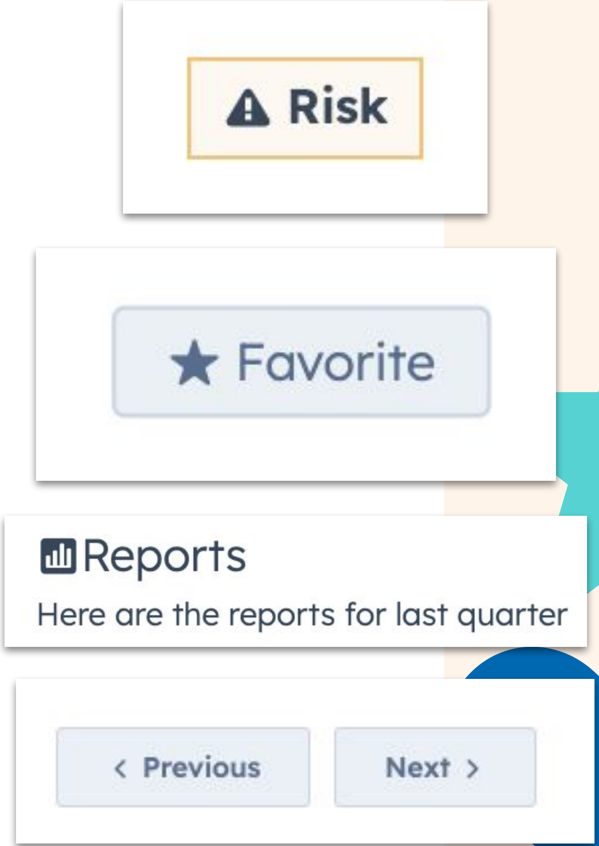
Launch region: Global



Operations Hub™

Operations Hub™

Data Sync - Bulk Recreate Deleted Records through the Record View

We've expanded the functionality to bulk resync deleted records within the Sync Insights tool, now available in both the "Object view" and "Record view" pages. This improvement enhances the user experience by providing increased visibility into the number of restored records and sending notifications upon process completion.

Use Case

For users leveraging Data Sync integrations, the ability to bulk resync deleted records directly from the "Record view" in Sync Insights can save time and streamline the process of restoring important data.

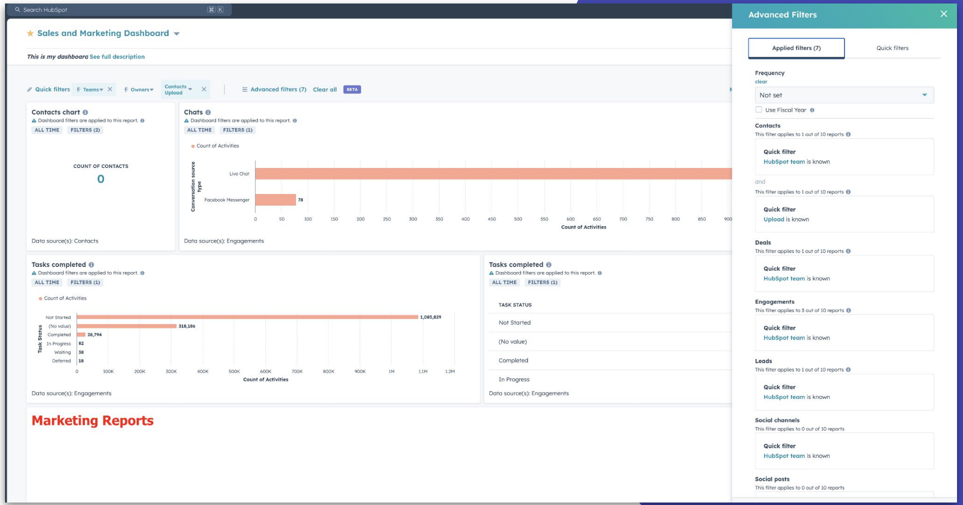
Free Starter Pro Ent Live

Launch region: Global

Operations Hub™

The New Dashboards Filters Experience is Live

The new dashboard experience includes enhancements allowing users to set multiple filter values across multiple reports on a dashboard, now live in all HubSpot portals.



Use Case

The combination of both Quick and Advanced filters gives users the flexibility to pin up to 5 filters (or filter groups) to any dashboard, and add any additional filters through the Advanced filters experience.

[Learn More]

Free Starter Pro Ent Live

Launch region: Global

HubSpot

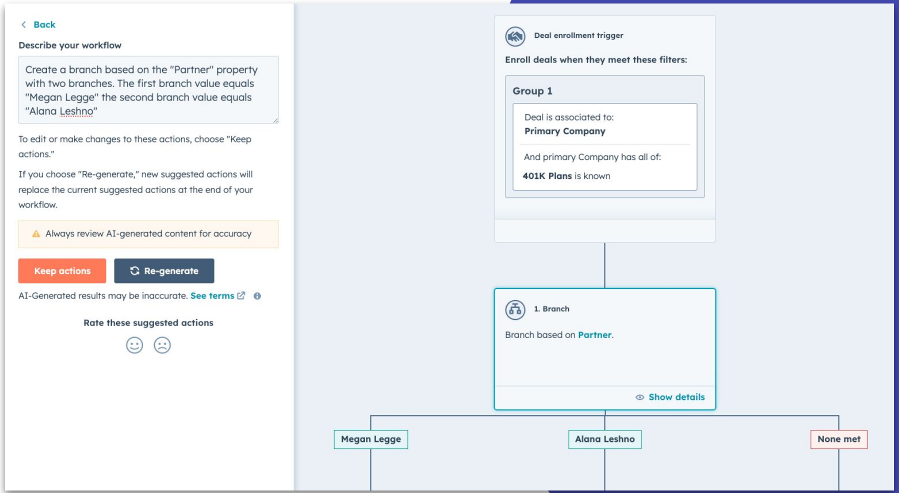
Operations Hub™

AI assistant to create workflow actions

The AI Assistant in Workflows provides enhanced time-saving and efficiency benefits to automation processes, enabling front office teams to easily automate and streamline tasks with just a few clicks while retaining control over the final outcome.

Use Case

This feature reduces the learning curve and assists in building automated processes that users have envisioned but may not know how to configure from scratch.



[Learn More]()

Free | Starter | Pro | Ent | Live

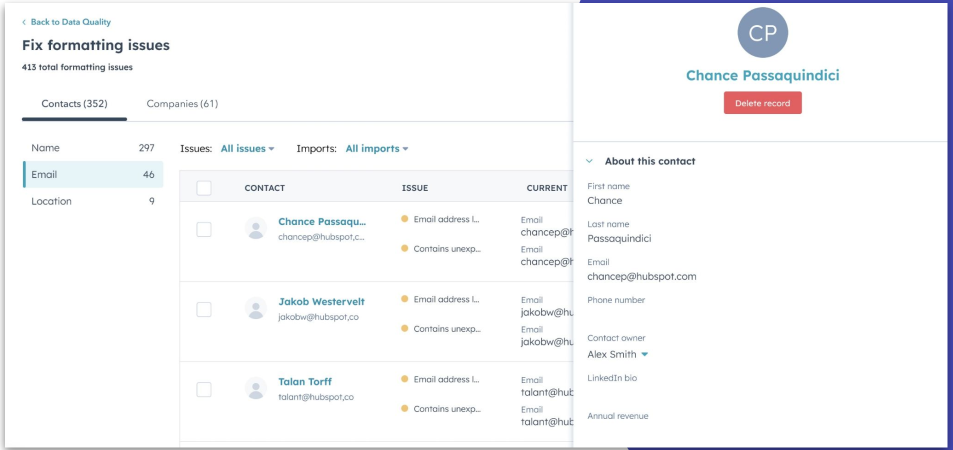
Launch region: Global

HubSpot

Operations Hub™

Delete Option in Fix Formatting Issues Tool

In addition to the existing ability to accept or reject our recommendations in the fix formatting issues tool, you can now delete the record directly within the app.



Use Case

The new delete functionality in our Fix Formatting Issues Tool solves a major pain point by giving you complete control over your data. Instead of being limited to accepting or rejecting our recommendations, you can now remove unnecessary records entirely, all within the same streamlined interface. This enhancement increases user experience, reduces friction, and provides more usability within the Fix Formatting Issues Tool.

Free | Starter | Pro | Ent | Public Beta

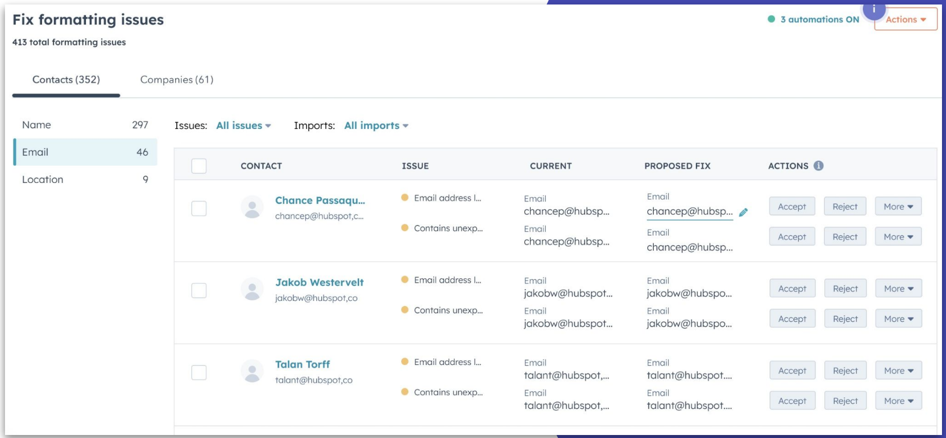
Launch region: Global

HubSpot

Operations Hub™

Edit Option in Fix Formatting Issues Tool

You can now edit records directly within the app in addition to accepting or rejecting recommendations in the Fix Formatting Issues tool.



Use Case

The new edit functionality in our Fix Formatting Issues Tool solves a major pain point by giving you complete control over your data. Instead of being limited to accepting or rejecting our recommendations, you can now make customized edits, all within the same streamlined interface. This enhancement ensures data accuracy, consistency, and integrity while boosting efficiency and flexibility in managing formatting issues.

Free Starter Pro Ent Public Beta

Launch region: Global

Operations Hub™

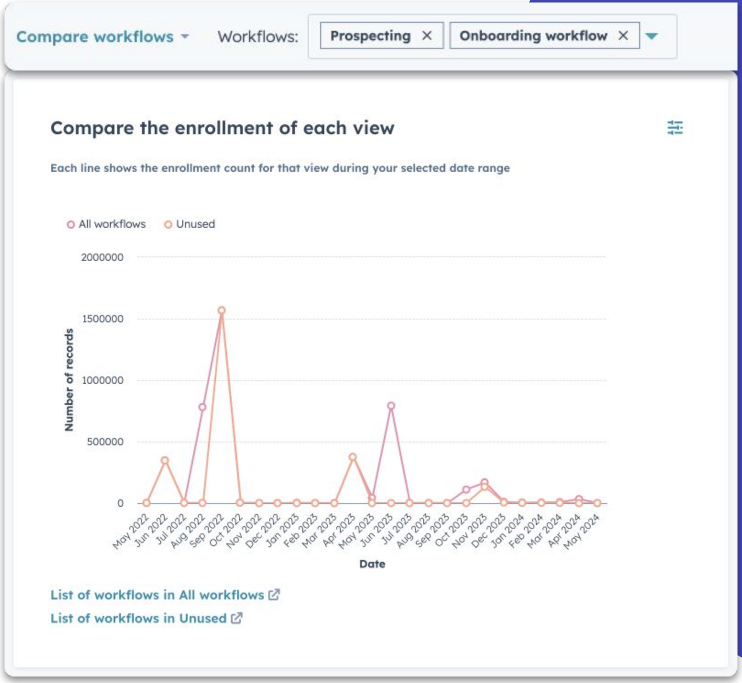
Analyze Automation Performance via the Workflows Analyze Tab

With Automation Analytics, customers will quickly discover the extent of automation employed, and identify potential areas for additional automation to streamline their operations and the performance of existing automation processes.

Use Case

These analytical tools will assist customers in easily identifying:

- The extent to which automation is employed across their business and potential areas for further automation.
- Performance metrics of automations, including changes in enrollment rates, and comparing enrollment of specific workflows or workflow views (groups of workflows).



Free Starter Pro Ent Public Beta

Launch region: Global

Operations Hub™

New options for "One property or action output" branching

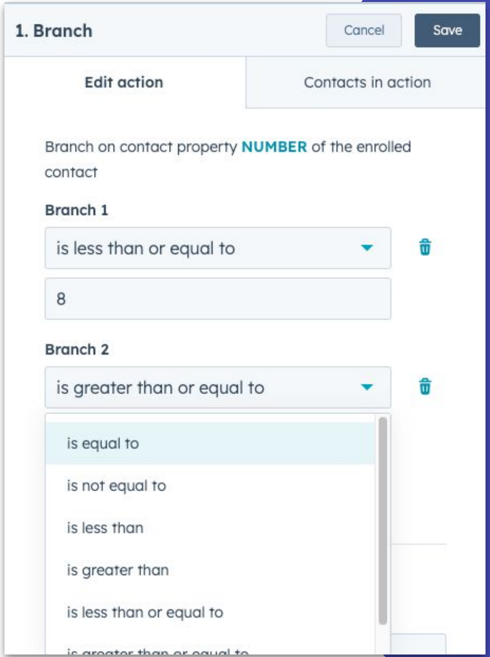
"One property or action output" branching just got more powerful! Don't worry though - it's still quick and easy to use branch actions in the Workflows tool.

Use Case

To expand functionality while maintaining the ease of use of this branch option, we added additional support for the most used filter operators in this branching option. For example, you can now create branches for number values, such as "Amount" is greater than or equal to 100. If you're an Operations Hub customer, this also works with outputs from the custom code and webhook actions.

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

Launch region: Global



Operations Hub™

Trend Lines on Reports

Trend Lines are a new visual option to enhance your reports. You can now add multiple types of trend lines in the Report Viewer.

Use Case

Trend lines offer a clear and concise way to visualize how your data is changing over time. This makes them an ideal choice for answering time-related queries like "How have our sales figures grown over the past year?", "What is the trend in our website traffic over the last six months?", or "How have our customer satisfaction ratings changed quarter over quarter?". Trend lines can be extended to forecast future values based on historical data, allowing for easy predictive analysis.

Free Starter Pro Ent Live

Launch region: Global

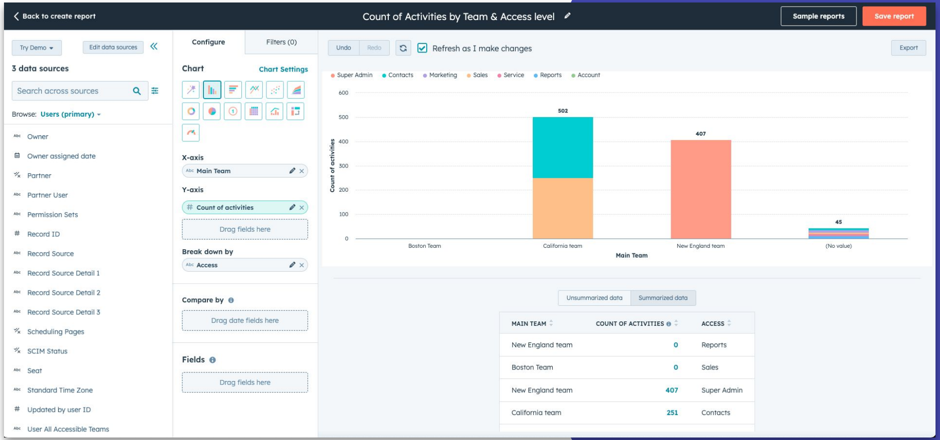
Operations Hub™

User Object available in Reports

As part of our goal to build a solution where Users are fully functioning CRM objects, we are making Users available in single and multi-object Reports..

Use Case

We know that CRM Admins and Managers desire more insights into how their teams are (or are not) interacting with HubSpot in order to make data driven decisions. By enabling reporting on Users, these leaders can now get a more complete understanding of their team's portal usage and help their team focus on improving usage where it matters the most for their business.



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

Launch region: Global

Operations Hub™

Interactive Workflow Diagram Highlighting an Object’s Path through a Workflow

The workflow editor now shows the Enrollment History together with the workflow diagram that matches the version of the workflow that each enrollment experienced. The workflow diagram now highlights what happened to each enrollment, including which branch-paths it followed and which end-point it reached.

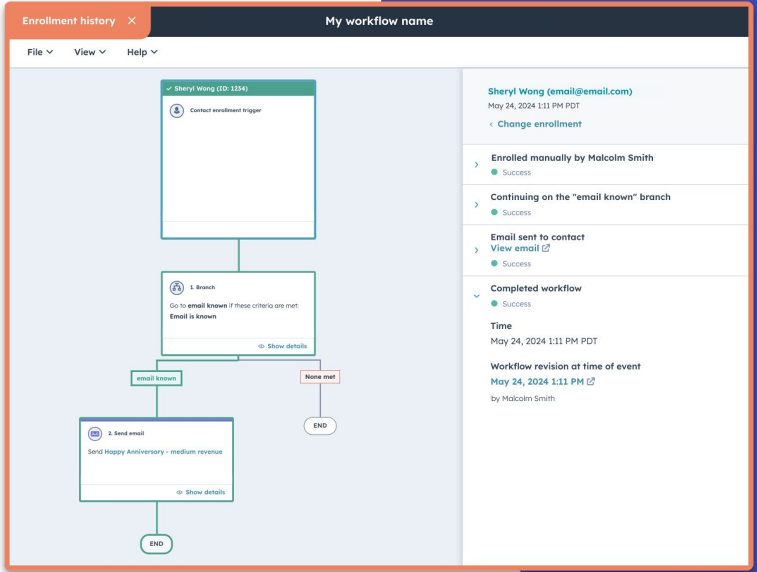
Use Case

Customers can now quickly see visually what happened to each enrollment at every step in a workflow right on the workflow editor. They no longer need to piece together data from the action logs and the version history.

[Learn More]

Free | Starter | Pro | Ent | Public Beta

Launch region: Global



Commerce Hub™

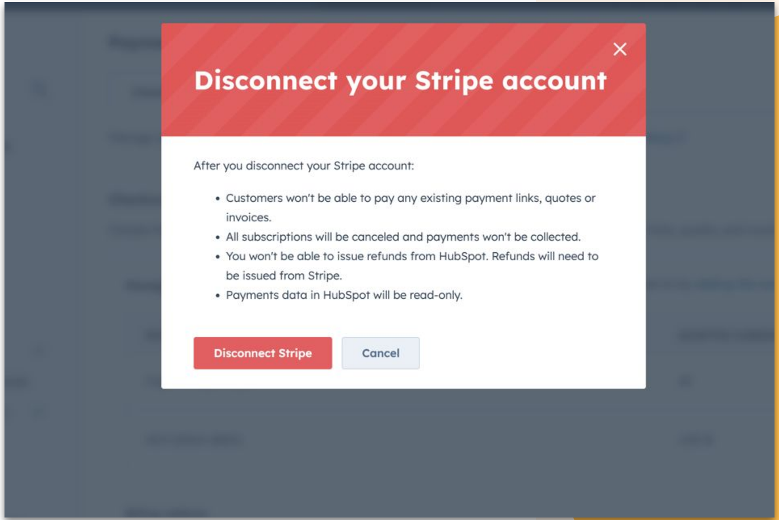
Commerce Hub™

Reconnect with a new payments account in Commerce Hub

You can now disconnect their payments account for Commerce Hub and reconnect it with either Stripe payment processing or HubSpot payments.

Use Case

With the ability to disconnect and reconnect with either a new Stripe account or HubSpot payments, users can easily adapt their payment processing setup to align with their business needs or preferences, enhancing flexibility and convenience in managing payment collections through Commerce Hub..



Free Starter Pro Ent Live

Launch region: Global

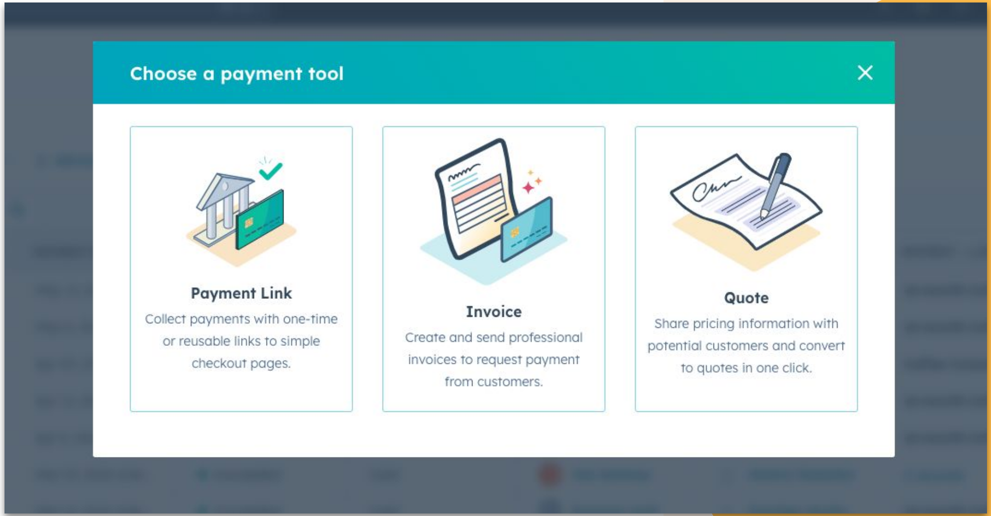
Commerce Hub™

New 'Collect payment' selection in Commerce Hub

Commerce Hub customers need a quick and easy way to get paid. To make finding the right payment tool easier, we've introduced a 'Collect payment' action from the Payments view.

Use Case

Now, you can use the 'Collect payment' action to choose the right payment tool for your sales process, whether that's a payment link, quote, or invoice.



Free Starter Pro Ent Live

Launch region: Global

Commerce Hub™

Custom Invoice Fields now Available in Commerce Hub

Merchants can choose up to 4 additional custom fields to display on their HubSpot invoices. Previously, they were limited to using the basic HubSpot template. This gives users more flexibility and control in configuring the content of their invoices to suit the nature of their business. This functionality is only available to users who are enrolled in HubSpot Payments or Stripe.

Use Case

A merchant wants to have additional information displayed on all of their HubSpot invoices. Examples include alternate mailing address, product information, or internal ID number.

**available to users with super-admin permissions*

Free Starter Pro Ent Live

Launch region: Global

Developer Platform

Lists v3 API

The V3 Lists API replaces the V1 Lists API. It allows developers to manage the memberships of existing lists by viewing, adding, or removing records, as well as to create and delete lists.

Use Case

The evolution of Contact lists to include new filtering criteria and the support for objects beyond Contacts highlights the need for a more advanced API like V3 Lists API, making it essential for developers to effectively handle advanced list management features and support a wider range of objects within HubSpot.

Learn More

Free Starter Pro Ent Live

Launch region: Global

Contact Limit Increase Standard Sandboxes

Starting May 1st, we're increasing the contact limit in Standard Sandboxes from 100K to 200K contacts. This change is reflected in our Product and Services Catalog.

Use Case

We're increasing the contact limit in Standard Sandboxes from 100K to 200K contacts to support users who are testing large numbers of contacts in the following example use cases:

- Data migration script testing (e.g. migration off of Microsoft Dynamics)
- Data flow and segmentation testing to and from HubSpot and other systems (e.g. SQL DB to HubSpot Objects and vice versa)
- Load testing (e.g. to test production threshold limits and API calls to identify edge cases that may break production data, impact end users, and bring inefficiencies to their business processes)

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

Launch region: Global

CRM Platform

CRM Platform

Improvements to Suspicious Login Alerts

Admins will now receive suspicious login alerts based on geolocation and travel time checks, in addition to the existing criteria. These notifications will now be sent to super admins and security admins by default, though admins can opt-out anytime.

Use Case

Earlier this year, we released our first version of Suspicious Login Alerts. We have made some additions to the feature to better detect risky logins by adding geo-velocity checks between events. We have also made them available to users with the new security admin permissions.

Free Starter Pro Ent Live

Launch region: Global

CRM Platform

Sync Property Type

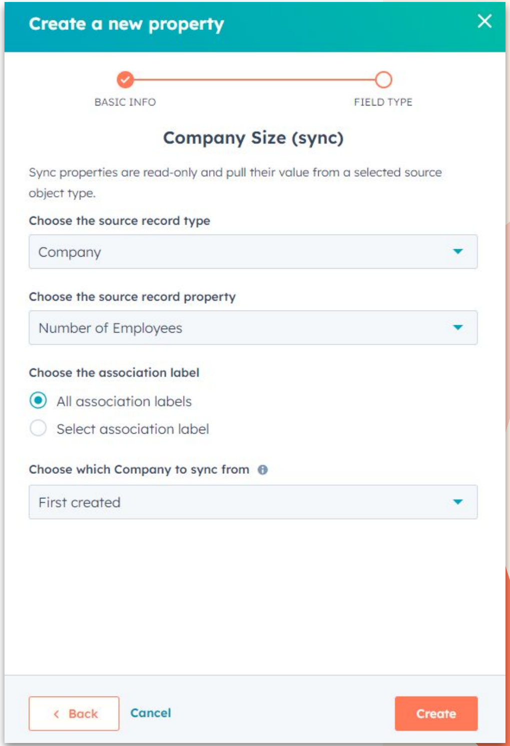
Sync Properties are a new property type that customers can use to copy a property value across objects. This feature eliminates the need for manual entry or workflows to keep two properties in sync across objects. This makes it even easier for customers to have the data they need, when and where they need it.

Use Case

Sync Properties means admins can say goodbye to painful and time-consuming workarounds. This feature eliminates those cross-object data silos and ensures that your data is consistently updated and aligned across objects.

Free Starter Pro Ent Live

Launch region: Global



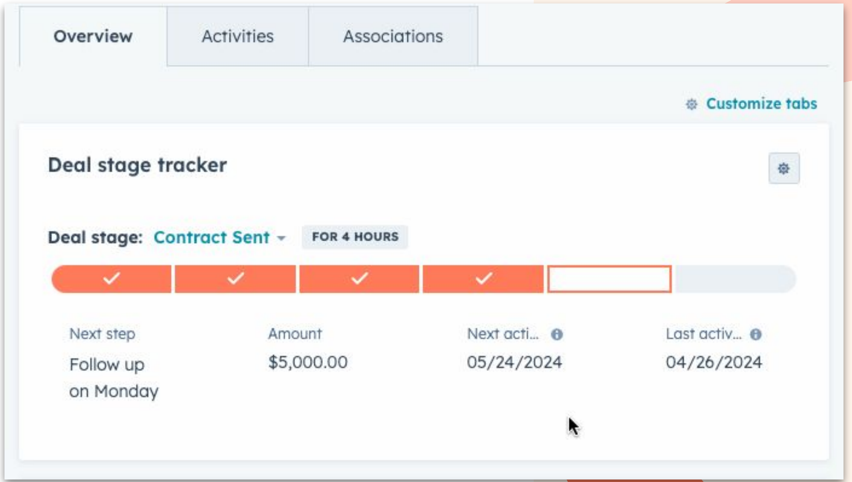
CRM Platform

Deal Velocity & Contact Lifecycle Stage Velocity in Stage Tracker Card

Introducing Deal Velocity & Contact Lifecycle Stage Velocity in the Stage Tracker card for the record middle column.

Use Case

See how long your deal or contact has been in its current stage. Dig deeper to see how quickly your record progressed through prior stages. Also included: get prompted for required properties directly from Stage Tracker and add up to 4 properties to round out your stage tracker.



Free Starter Pro Ent Live

Launch region: Global

**All hubs and tiers get the default version of Stage Tracker.*
***Required properties for Stage changes are available in Starter+ subscriptions*
****Deal Velocity and Contact Lifecycle Stage Velocity use the Latest Time in Stage property from Deal Stage Calculated Properties and Contact Lifecycle Stage Calculated Properties. These properties are available in Pro+.*

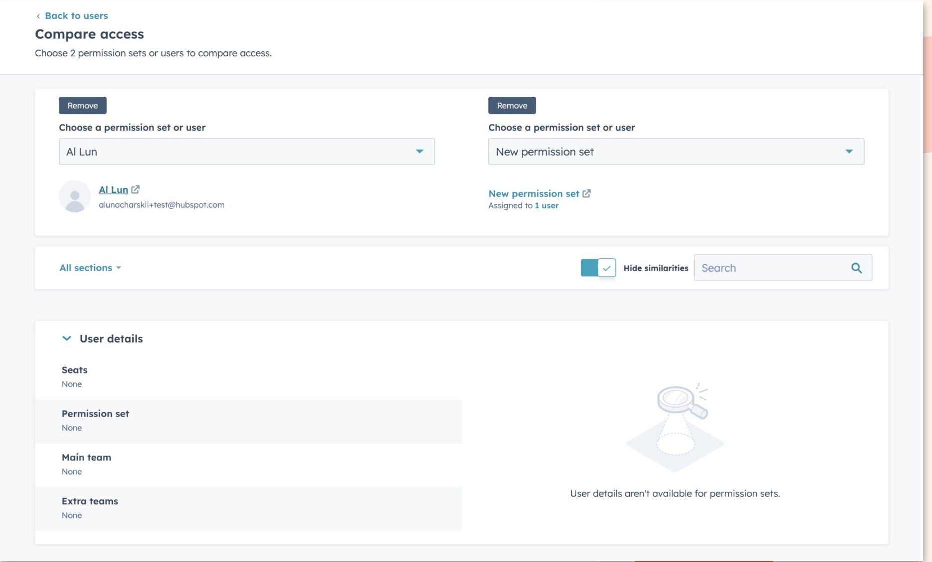
CRM Platform

Compare Permissions

The new Compare Permissions feature allows users to easily compare permissions between different users and permission sets.

Use Case

This feature is essential for admins who need to quickly assess and understand the differences in access levels between users or permission sets.



Free Starter Pro Ent Live

Launch region: Global

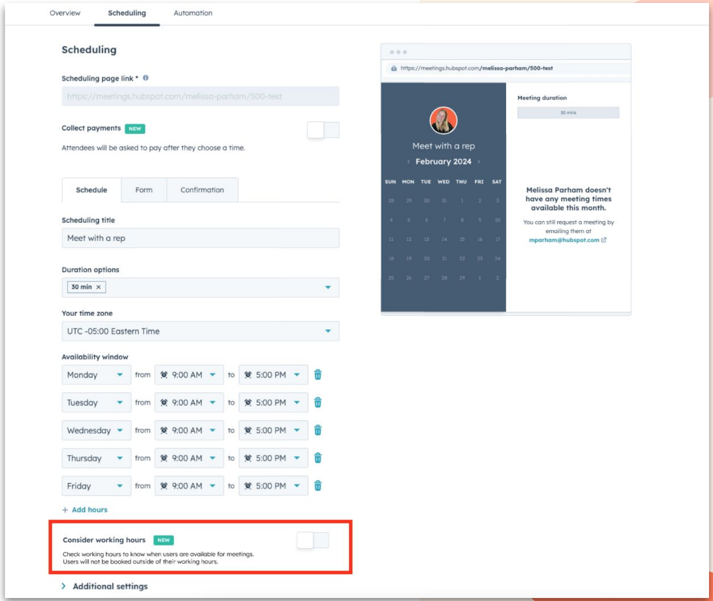
CRM Platform

Consider working hours when booking meetings through scheduling pages

Users can now customize their time zone and working hours in HubSpot at the user level, enabling these preferences to be considered when calculating meeting availability on scheduling pages.

Use Case

By introducing individual time zones and working hours for each user, this enhancement ensures more accurate and personalized scheduling that aligns with users' specific time preferences and availability, ultimately improving the overall scheduling process and customer experience.

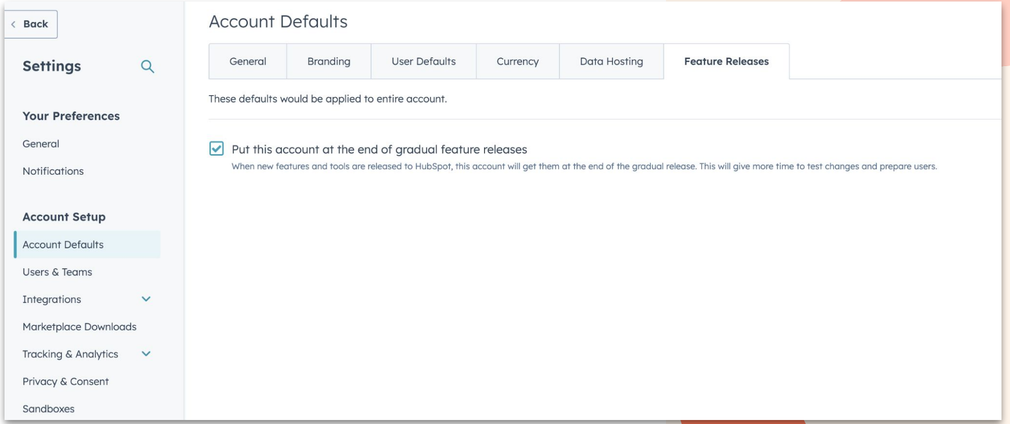


Free Starter Pro Ent Live

Launch region: Global

Place your account at the end of gradual feature releases

Super admins are now able to place their accounts at the end of gradual feature releases in Settings. This will give admins more time to test changes, update documentation, and train their users.



Use Case

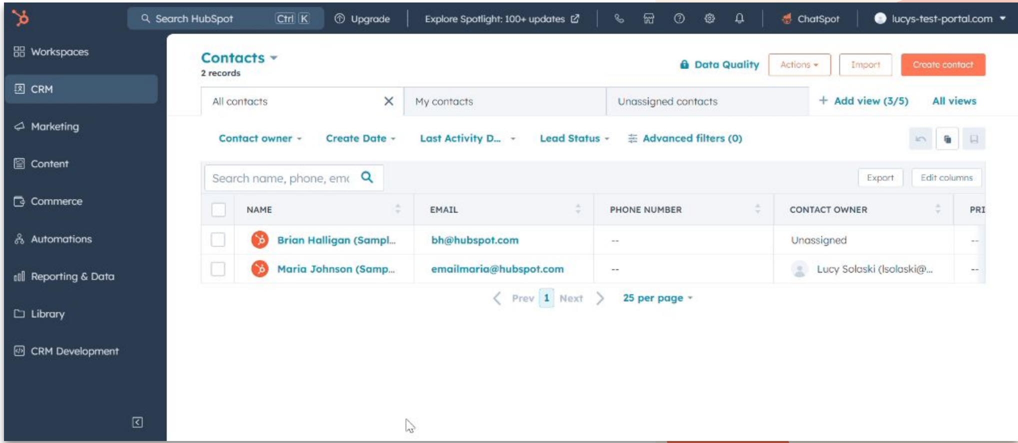
HubSpot's product teams are continually building and shipping new features with the goal of helping our customers grow better. These updates provide lots of value, but some require more time for configuration and training. Our goal is to support admins' change management processes by giving them more time to prepare for upcoming changes that may impact existing setups and users.

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

Launch region: Global

ChatSpot in the global navigation

We're pleased to announce that ChatSpot is now available in the global navigation of the HubSpot app for customers enrolled in the private beta. This means you can access it from anywhere the global navigation is available. Whether you're browsing through pages or checking your dashboard, ChatSpot is just a click away. ChatSpot is now available in the HubSpot app via the global navigation.



Use Case

Having ChatSpot available globally enhances your workflow by providing instant context and assistance no matter where you are in the app. This seamless integration ensures that help is always on hand, so you can work more efficiently and creatively without ever needing to switch contexts. Get ready to boost your productivity and make the most out of every feature.

Free Starter Pro Ent Live

Launch region: Global

CRM Platform

View Record Access

View Record Access is now available in the dropdown of Actions within a CRM Record. Within the feature, you can see what users have access to the specific Record, what access they have, who are the owners of the record, and what is the change history of the owners.

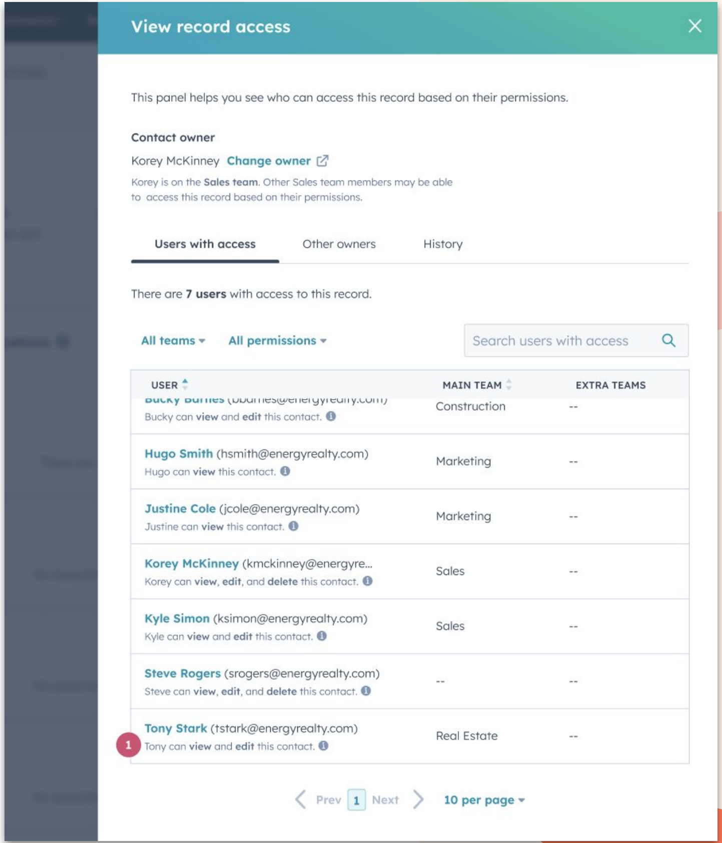
Use Case

The inclusion of the View Record Access feature enhances visibility and transparency for administrators in understanding and managing user access to CRM Records. By offering a consolidated view of user permissions, teams, contact owners, and custom user properties that influence access privileges, this feature streamlines the process of identifying who can communicate with, view, edit, or delete specific CRM Records.

[Learn More]

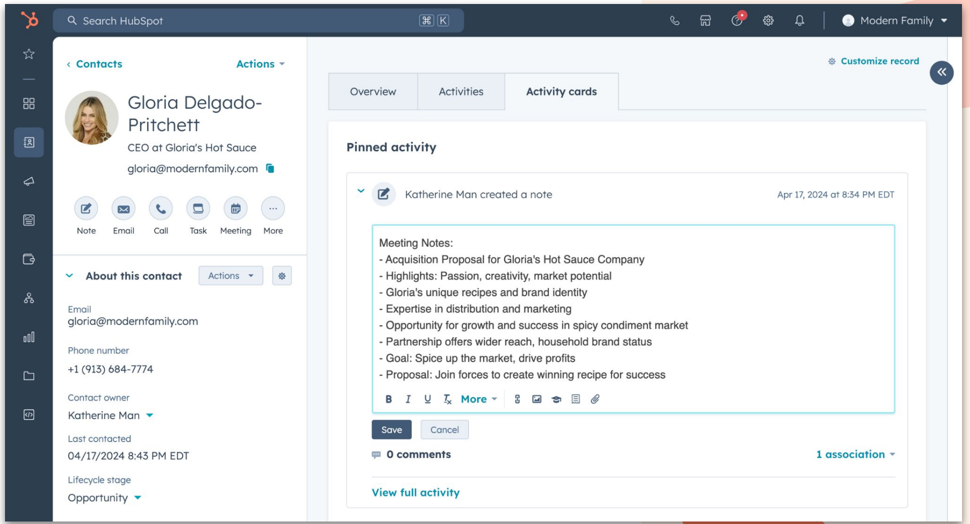
Free Starter **Pro** **Ent** **Live**

Launch region: Global



Expendable and Editable Activity Cards

Now, users can expand and edit activity cards in the record middle column and preview sidebars. Activity cards include pinned activity, recent activities, and upcoming activities.



Use Case

You can expand and edit activities in activity cards without needing to go to the record timeline. This saves valuable time and provides valuable context for your work.

Free Starter Pro Ent Live

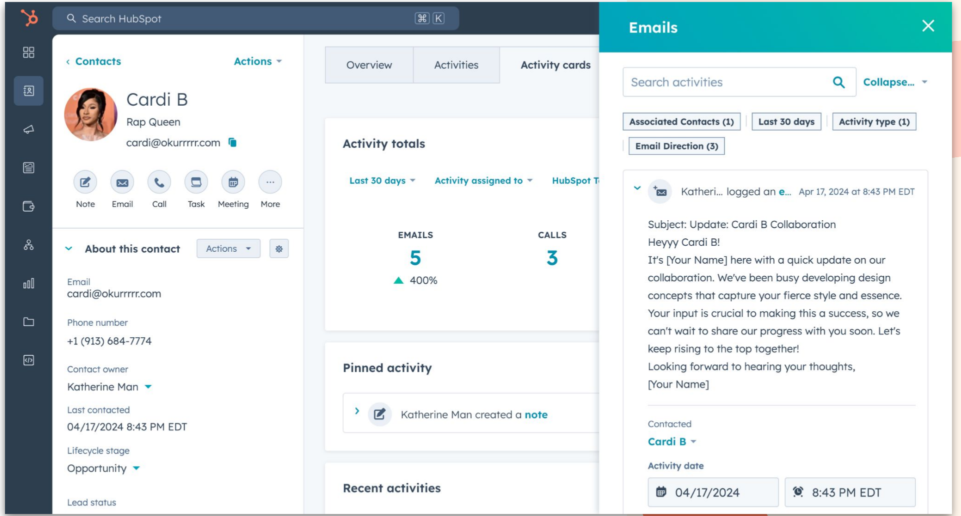
Launch region: Global

Activity Totals Card

The activity totals card is a new card that customers can display in the middle column of record pages that displays an aggregate count of how many emails, calls, meetings, and tasks have been created.

Use Case

Customers are able to get a quick sense of engagement with a record without needing to scan the record timeline. This card is designed to benefit both reps and managers. It offers a concise snapshot of crucial activity data on a record, eliminating the need to toggle between tabs or scroll through the entire timeline.



Free | Starter | Pro | Ent | Live

Launch region: Global

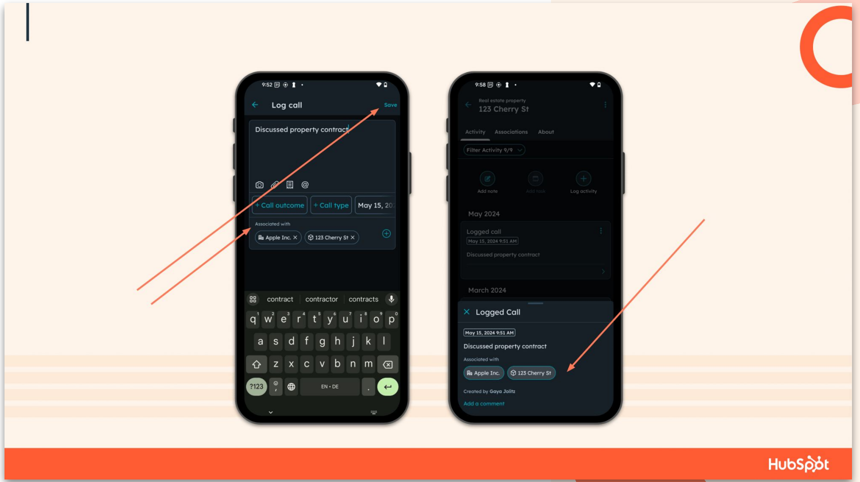
CRM Platform

Create & Associate an Activity with a Custom object record on Android

Users can create and associate Notes, Calls, Emails, Meetings, SMS, WhatsApp, LinkedIn message and Postal mail with a Custom object record.

Use Case

Custom objects are an essential part of the CRM, and users who have Custom objects want the ability to log activities on Custom object records and associate those activities with Custom object records when they use the HubSpot app on the go.

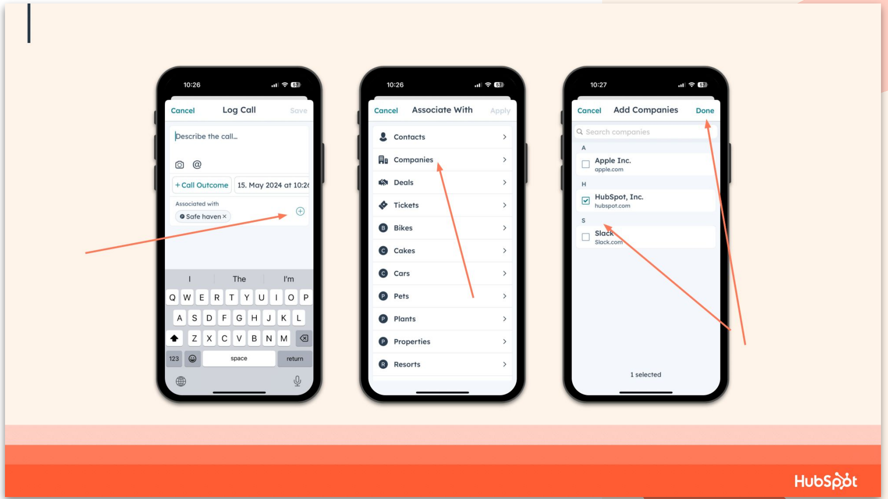


Free Starter Pro **Ent** **Live**

Launch region: Global

Create & associate an activity with a Custom object record on iOS

Users can create and associate Notes, Calls, Emails, Meetings, SMS, WhatsApp, LinkedIn message and Postal mail with a Custom object record. Editing Notes and Activities from the Custom object record, as well as creating Tasks will be made possible in a separate release.



Use Case

Users who have Custom objects want the ability to log activities on Custom object records and associate those activities with Custom object records when they use the HubSpot app on the go.

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

Launch region: Global

CRM Platform

Help has moved to the top navigation

The link to HubSpot Help has moved from the bottom-right corner to a “?” icon in the top navigation menu.

Use Case

This change will enable you to find Help more easily and to solve your questions with our newly-expanded range of self-service resources.

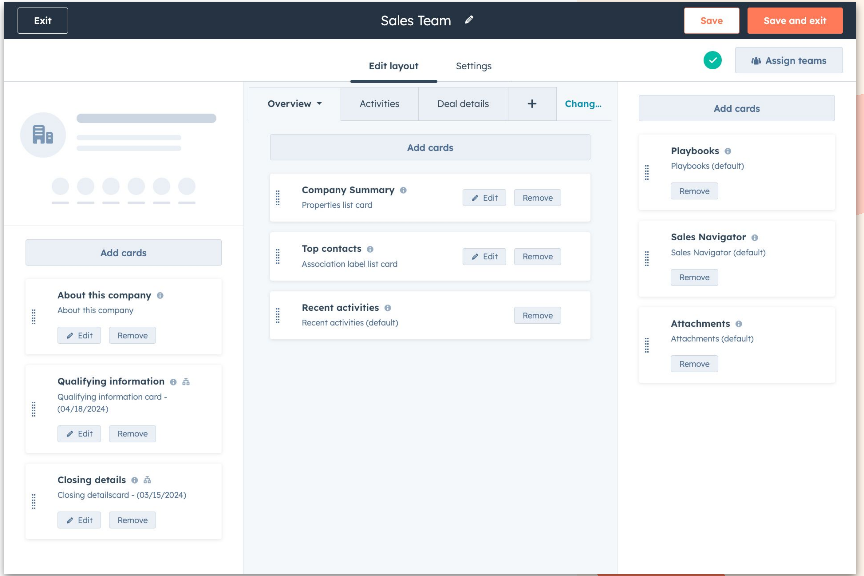
Free Starter **Pro** **Ent** **Live**

Launch region: Global

CRM Platform

Unified record page editor

The unified record page editor allows admins to easily customize the record in one place, giving them a holistic view of what their teams will see.



Use Case

The unified record page editor allows admins to customize the entire record page in one integrated editor so they can provide their teams with the right information at the right time, helping them deliver a better customer experience.

Free | Starter | Pro | Ent | Public Beta

Launch region: Global

CRM Platform

Navigation Bookmarks

There's a way to make the navigation personalized for every user. We're introducing Bookmarks in the navigation that allows each user to personalize their experience based on frequent workflows and preferences.

Use Case

- Streamline access to frequently used apps: you can bookmark key apps you use daily allowing faster access
- Improved workflow efficiency: you can adjust your favorites based on what is relevant to you in your current role, enabling a more focused workflow
- Personalized user experience: you can tailor your navigation experience by bookmarking items that align with your workflows and preferences
- Onboarding and training: during onboarding, new users can be encouraged to bookmark essential menu items, helping them learn the platform more quickly by focusing on core functionalities

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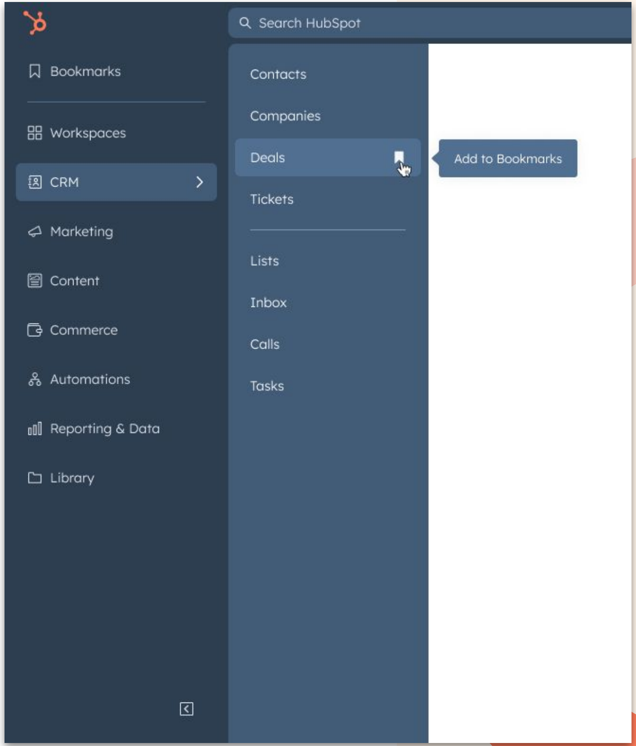
Launch region: Global



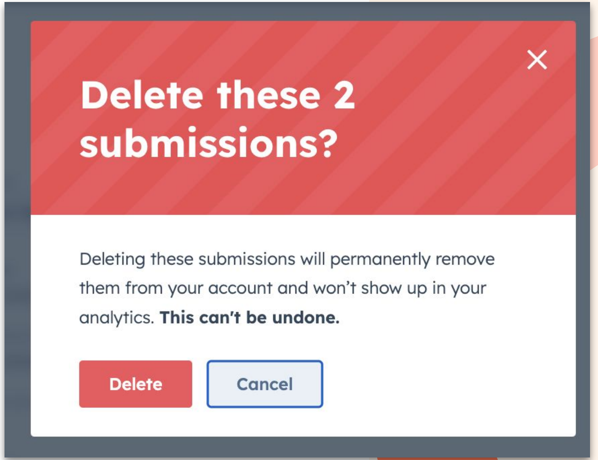
CRM Platform

Delete Form Submissions

Users with appropriate permissions can now delete form submissions. By default the super admins for the HubSpot portal will be granted access to delete form submissions. Any user who needs to delete form submissions should reach to their portal admin to get the necessary permissions.

Use Case

The ability to delete form submissions addresses common challenges faced by users in managing test submissions and unwanted data in their form analytics. This feature empowers users to maintain accurate form submission data, improve reporting precision, and streamline data analysis within HubSpot.



Free Starter Pro Ent Live

Launch region: Global

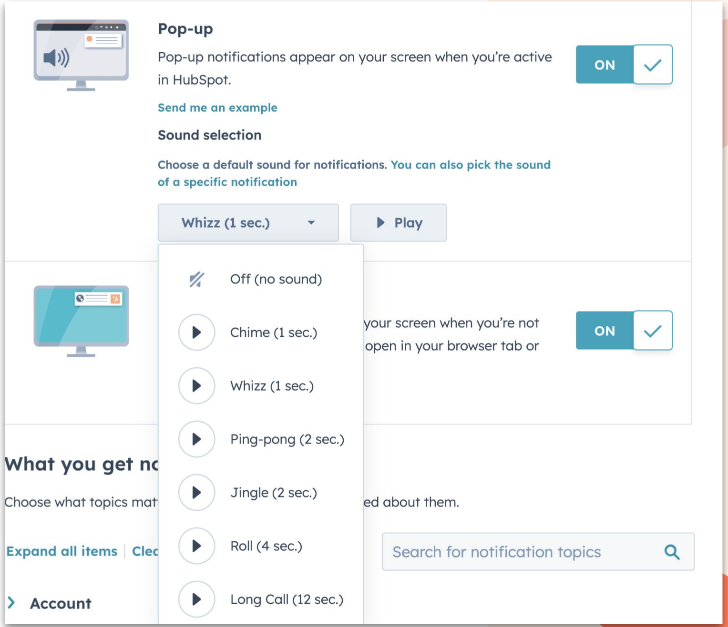
CRM Platform

Set a unique sound for every notification

You now have the option to choose from 6 different sounds for your desktop notifications. These sounds vary in length and tone, allowing you to select the one that best suits your preferences

Use Case

As there was only one default notification sound for desktop notifications, if a specific type of notification mattered more to you, you couldn't tell that it had arrived as every other notification had the same sound. Because of this, it was easy to miss an incoming chat or ticket that was crucial for the business.



Free | Starter | Pro | Ent | Public Beta

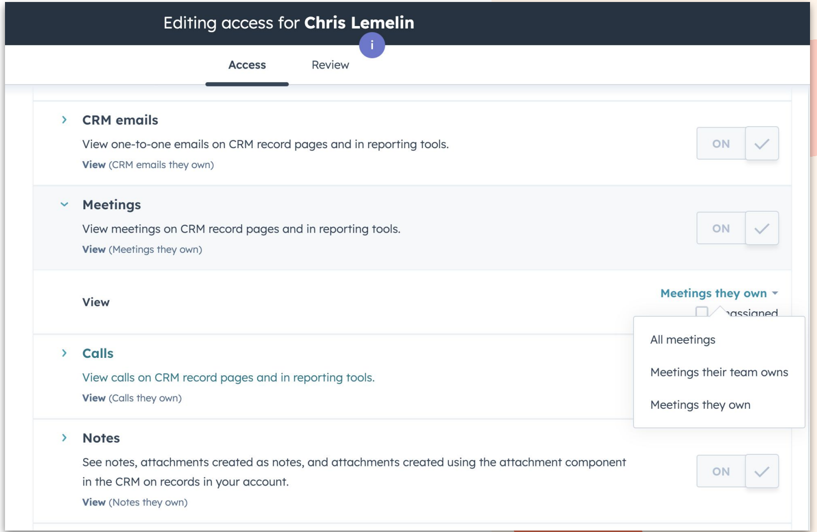
Launch region: Global

CRM Platform

View Meeting Permission

A new permission is being added which can limit the ability for users to view logged Meetings across HubSpot. The permission can be set to the following levels:

- All meetings: The user can see all logged meetings.
- Meetings their team owns: The user can see meetings they or their team members took part in.
- Meetings they own: The user can only see meetings they took part in.
- Unassigned: The user can see meetings without an owner. This is an additional option when access is set to meetings they own or meetings their team owns.



Use Case

Today when a user logs a meeting to HubSpot, any HubSpot user with access to the CRM record (such as the contact where the meeting is logged) can view that meeting. This is an issue for many customers who have different employees meeting with the same Contact or Company.

Free | Starter | Pro | Ent | Public Beta

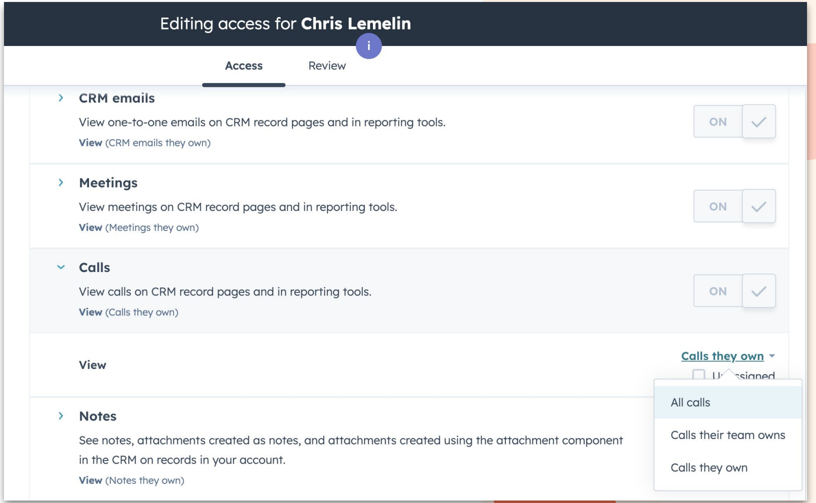
Launch region: Global

CRM Platform

View Call Permission

A new permission is being added which can limit the ability for users to view logged calls across HubSpot. The permission can be set to the following levels:

- All calls: The user can see all logged calls.
- Calls their team owns: The user can see calls they or their team members took part in.
- Calls they own: The user can only see calls they took part in.
- Unassigned: The user can see calls without an owner. This is an additional option when access is set to calls they own or calls their team owns.



Use Case

Today when a user logs a call to HubSpot, HubSpot applies the User's View Contact permission to the owner of the call to validate if a user has access to the call. In practice, this means that admins have less control over whether a User can see a call placed by another User or another Team.

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

Launch region: Global

CRM Platform

Performance improvements to Dashboards on Mobile [iOS and Android]

We have significantly improved the performance and load times of Dashboards on Mobile.

Use Case

Dashboards on Mobile is how our customers keep a pulse on their business - be it how much revenue the sales team is going to bring in next month or how much traffic did the website get last week. Dashboards on mobile allows you to access your metrics in seconds.

Free Starter Pro Ent Live

Launch region: Global

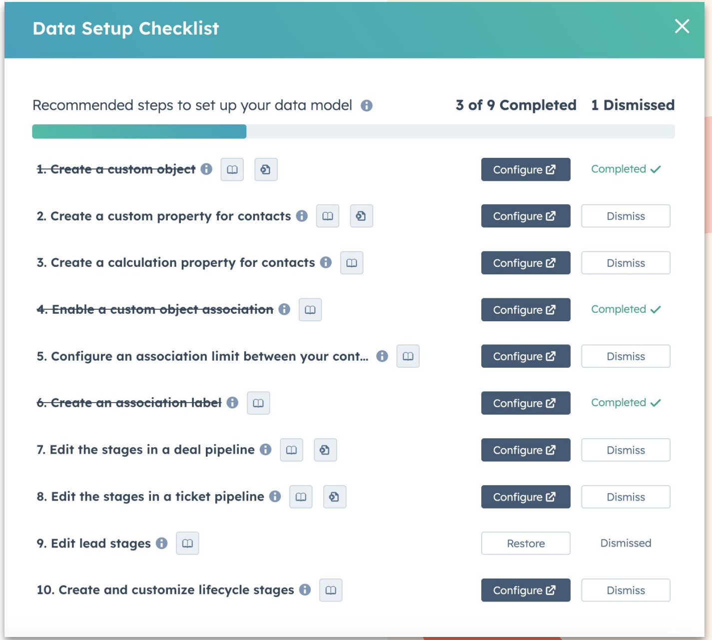
CRM Platform

Data Setup Checklist

A collection of core data model setup tasks that new admins should complete when configuring their data model. This checklist is oriented around new admins in enterprise portals. We plan to provide additional checklists in the future.

Use Case

The checklist is a valuable resource to help new admins streamline the setup process and ensure that essential data model configuration tasks are completed methodically.



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

Launch region: Global

CRM Platform

Property Lists of Associated Data (Association Property List card)

The Association Property List card allows you to view and edit contact properties directly from a company record. This feature enables users to select properties from associated records without the requirement of sync properties or workflows to copy data between properties for visibility on different record types.

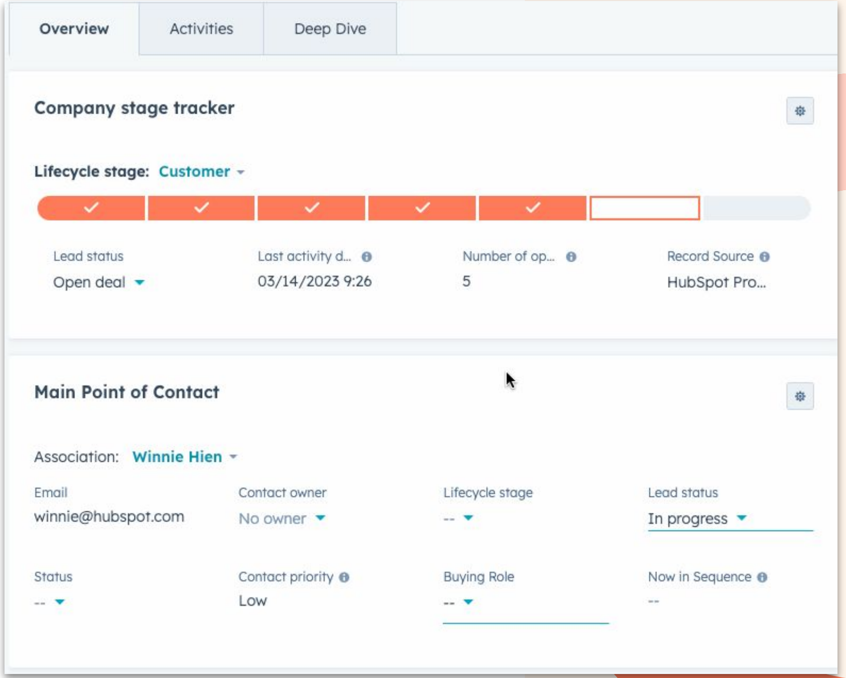
Use Case

This feature eliminates the need for sync properties or workflows to copy data between properties just to see them on other record types. Save your sync properties for reporting and powering your backend data needs.

[Learn More]

Free Starter Pro Ent Live

Launch region: Global



App Marketplace

New Pendo App Features: Bi-directional Sync and Custom Events

The Pendo app for HubSpot now has a bi-directional sync and custom events feature that allows you to:

Use Case

- Pull in Pendo visitor data and account data into HubSpot to help customer-facing teams get a more complete view of their customers.
- Push HubSpot account history and revenue into Pendo to provide additional data points for segmentation, analytics, and guide-targeting.
- Run targeted marketing campaigns based on specific product interactions by pulling custom event data from Pendo into HubSpot.
- Create powerful customer health scores in HubSpot by tracking specific interactions that signal a positive experience.

Explore the app

Free | Starter | Pro | Ent | Live

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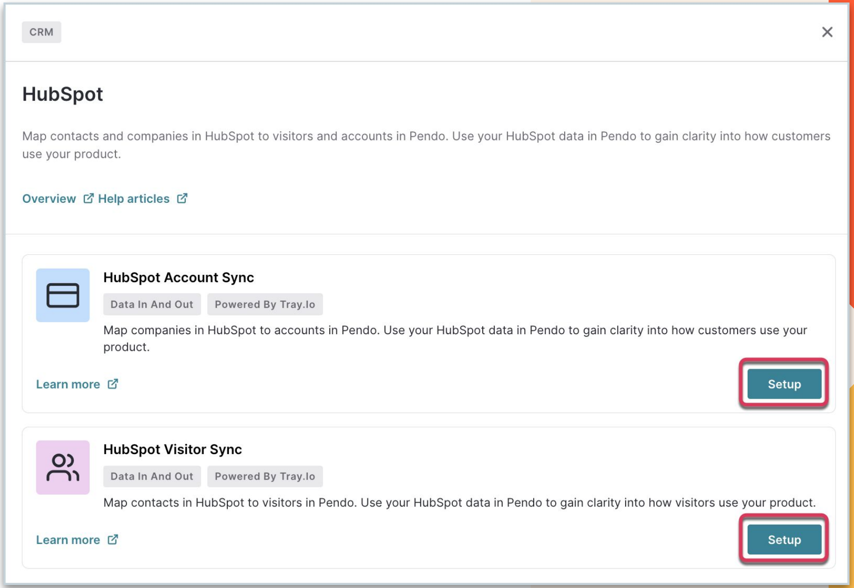


App Marketplace & Integrations

New & Improved Analytics for Marketplace Apps

HubSpot is committed to giving anyone with a listing in the [App Marketplace] the insights they need to understand and grow their performance, discoverability, and adoption.

Use Case

The first phase of these improvements are now available, including:

- A better way to access app analytics. In your partner portal, under App Marketplace Listings, click on the name of your app. That's it!
- A new key resource tab, so you can easily access information about the [App Partner Program], app certification, how to leave feedback and contact the app partner team at HubSpot.

Free Starter Pro Ent Live

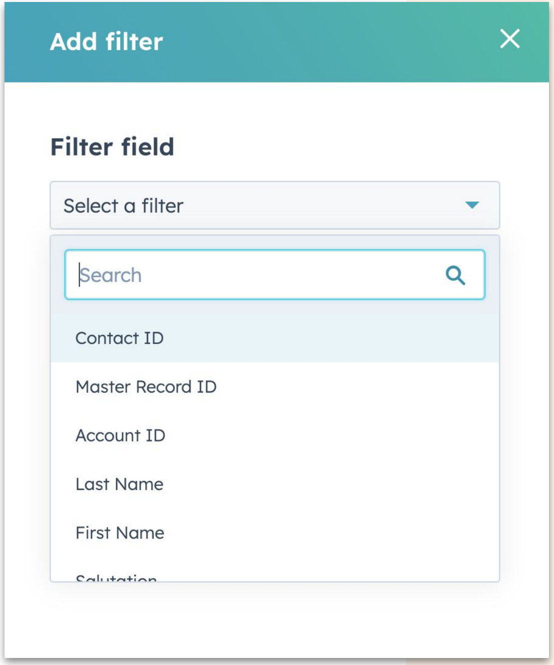
Launch region: Global

New for the Salesforce app: Filter imports by any Salesforce field

The Salesforce app now allows users to filter records by all available Salesforce fields when importing data, enabling specific segments of Salesforce data to be imported into HubSpot.

Use Case

Now, you can better filter records that you'd like to import from Salesforce according to all available Salesforce fields. This means you can better pinpoint exactly which records you want imported and give your customers the best marketing, sales, and service experience.



Free | Starter | Pro | Ent | Live

Launch region: Global

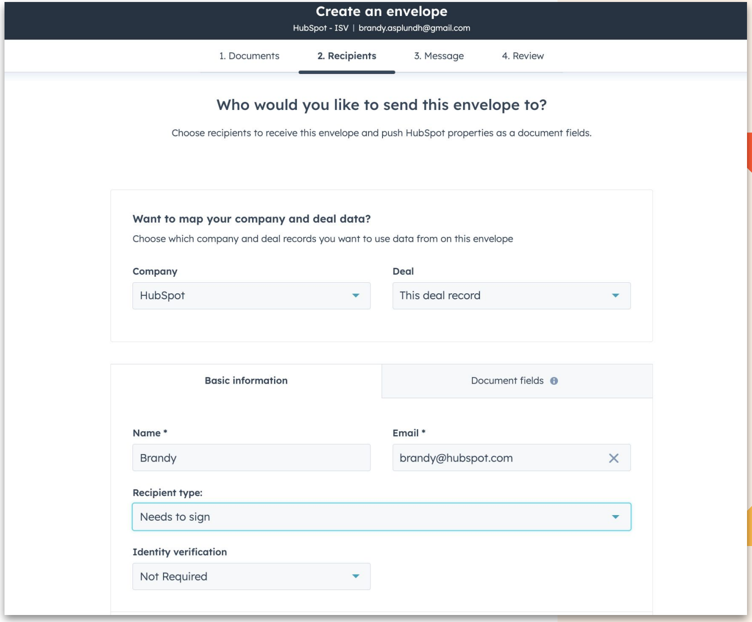
New Docusign envelope editor within HubSpot

A new Docusign envelope editor is now available, so you can seamlessly create and send Docusign envelopes without leaving HubSpot.

Use Case

With this new experience, you can now:

- Modify documents within a template as you're creating envelopes, including the ability to use attachments, delete documents, and upload documents directly from your computer
- Create envelopes from scratch without a template
- Edit envelope sending order (recipient order)
- Pull in contact, company, and deal information from HubSpot into documents



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Launch region: Global

Import Docusign envelopes

You can now seamlessly import historical Docusign envelopes into HubSpot. This gives you a full-picture view of all documents associated with your customers, so you'll have all the context you need right in HubSpot.

Use Case

With the ability to import historical Docusign envelopes seamlessly, users can now access a complete repository of customer documents in HubSpot, enhancing the understanding and context available for improved customer engagement and relationship management.

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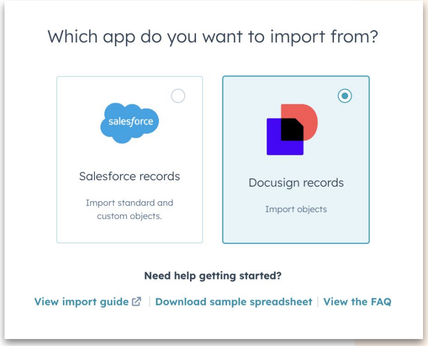
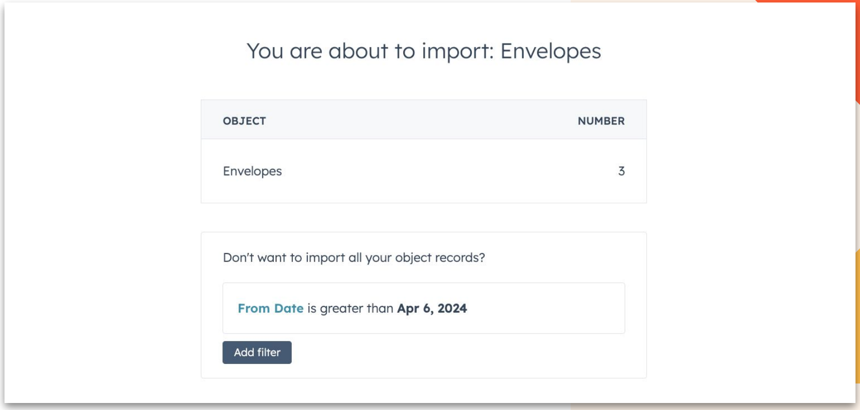




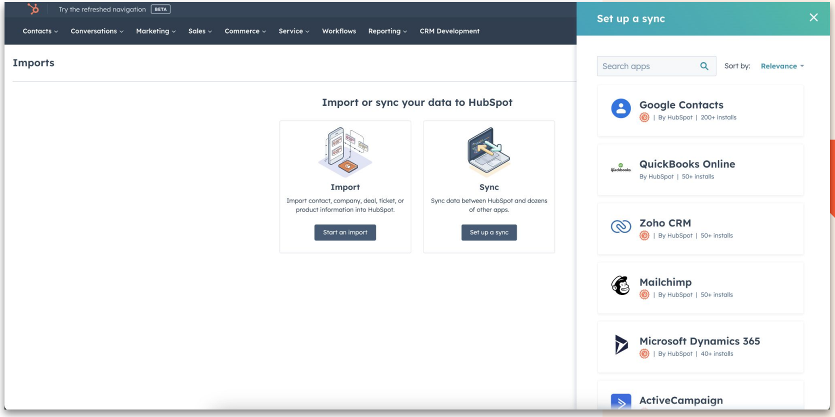
App Marketplace & Integrations

Install apps from new Imports side panel

Starting today, data sync apps are meeting you right where you're most productive – directly in HubSpot. Available in Imports, a new side panel allows you to scroll, search, and sort these apps without the hassle of context switching.

Use Case

By introducing a new side panel for data sync apps in the Imports section, HubSpot has streamlined the data syncing process. Users can now seamlessly set up syncs without leaving the Imports page, saving time and reducing the hassle of navigating between various platforms.



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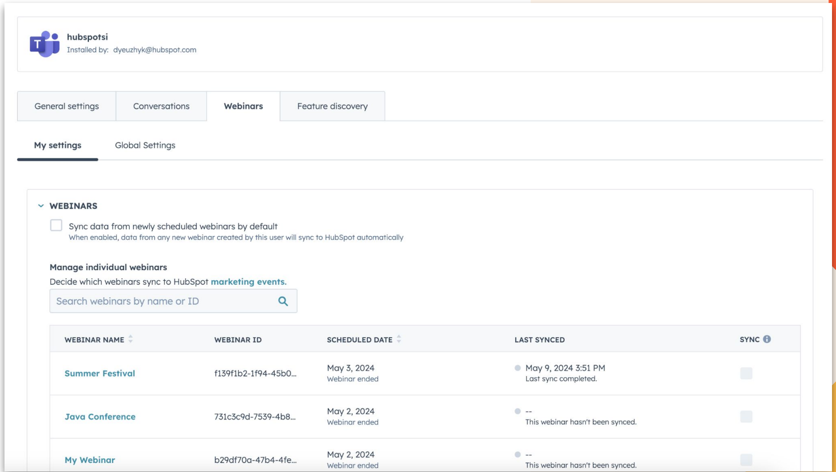
App Marketplace & Integrations

Sync Microsoft Teams Webinars to HubSpot Marketing Events

Now you can sync Microsoft Teams webinar info with HubSpot. With the updated Microsoft Teams integration, you can now:

- Sync webinar data such as event name, date, start time, end time, organizer, status, and description to HubSpot marketing events
- Sync webinar activity data such as registrations, attendees, cancellations, no-shows, attendance duration, etc. and display this activity on contact pages
- Create new contact records for registrants not yet in HubSpot



Use Case

You can sync Microsoft Teams webinar data to HubSpot, making it easier to centralize your marketing efforts, keep your contacts updated, and perform data-driven customer outreach.

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App Marketplace & Integrations

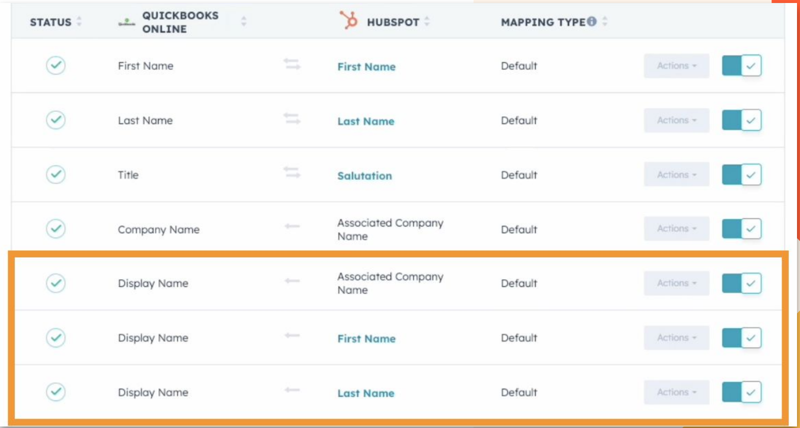
Use "Company Name" as Default Customer Display Name in QuickBooks Online

This functionality changes how Contacts synced to QuickBooks Online (QBO) appear. Starting today, a Contact that is synced into QBO as a Customer will appear with the Contact's Company Name, rather than their First Name and Last Name as their "Display Name".

Use Case

This change adds several new field mappings to the QBO Contact/Customer sync:

- QBO Display Name --> HubSpot Contact Associated Company Name
- QBO Display Name --> HubSpot Contact First Name
- QBO Display Name --> HubSpot Contact Last Name



[Learn More](#)

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New Requirements for App Certification

Starting May 15, new standards for certification will require apps to have at least 60 unique active installs for eligibility. This increase from the previous requirement of six installs applies to all new submissions and existing app partners. Existing certified apps must have an active install count that meets this new minimum requirement by May 15, 2025 to avoid de-certification.

Use Case

This new app certification requirement introduces a more robust threshold of active installs for anyone seeking to certify their listing on the App Marketplace. This change reflects our ongoing commitment to enhance the quality and credibility of certified apps available to customers.

Learn More

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Thank you