HubSpot Product Updates

February 2024 (January 2023 Updates)

New Seats-based Pricing

View-Only Seat

View HubSpot features without edit access.

Core Seat

Edit access to purchased Hubs and connection to HubSpot Smart CRM.

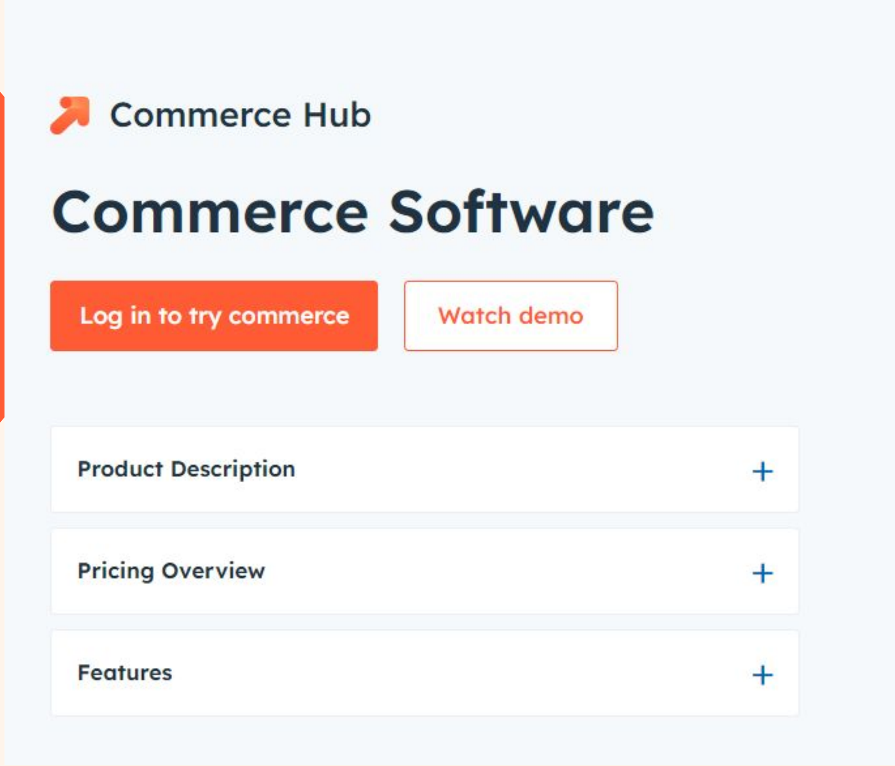
Sales & Service Seats

Everything included in a Core Seat plus additional Sales and Service features.

New Seats-based Pricing resources

- Introducing HubSpot's New Pricing Model
- Upcoming changes to HubSpot's pricing
- Partner Academy Training on Seats Pricing
- Manage paid seats and permissions

Commerce Hub



Commerce Hub resources

- Commerce Hub
- Commerce Hub goes International
- Commerce Hub Youtube Playlist
- Connect your Stripe account as a payment processor in HubSpot (BETA)
- Commerce Hub Pitch Deck
- Introduction to Commerce Hub

Marketing Hub™ + CMS Hub®

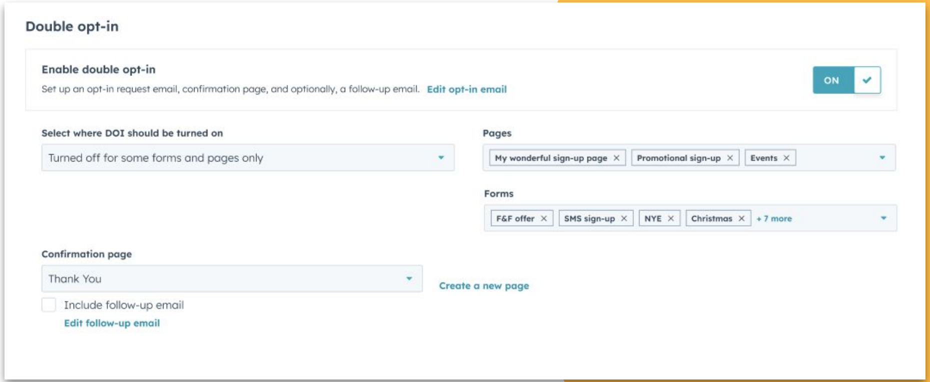
HubSpot

Marketing Hub™

Enable Double Opt-In for Forms

Historically, it was only possible to enable/disable double opt-in for select pages created in HubSpot.

With this change, you may choose to enable/disable double opt-in for select pages AND select forms of your preference. There are also some updates to action descriptions/copy to make it clearer.



Use Case

You have flexibility to apply double opt-in selectively, per form. For example, if it is mandatory in certain countries but not in others, you can choose which HubSpot forms use double opt-in and which ones do not.

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

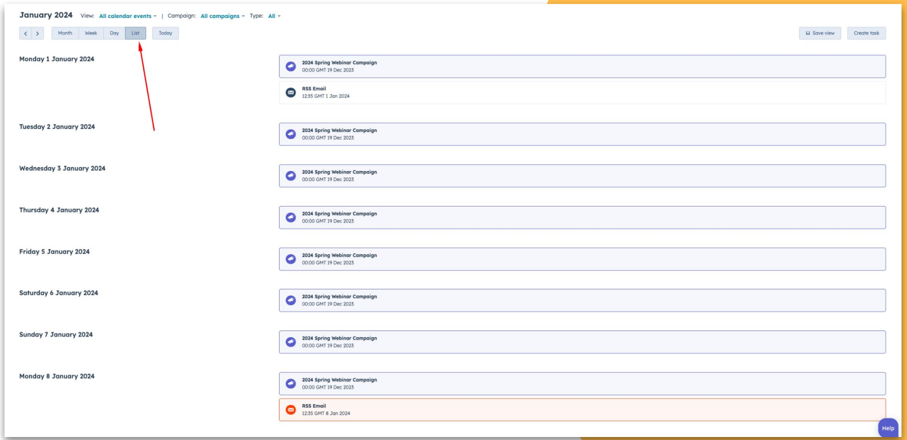
Launch region: Global

Marketing Hub™

Marketing Calendar Usability Improvements

We're introducing a handful of usability improvements to the Marketing Calendar. These updates include:

- A new "List view" to provide an overview of events across an entire month
- Increasing the minimum height of the Marketing Calendar allowing more events to be viewed at once
- Re-arrangement of some of the buttons to improve usability



Use Case

The marketing calendar enables marketing teams to stay aligned on the messaging going out, the channels being used (or overused), and generally help keep on top of what the whole team is working on.

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Launch region: Global

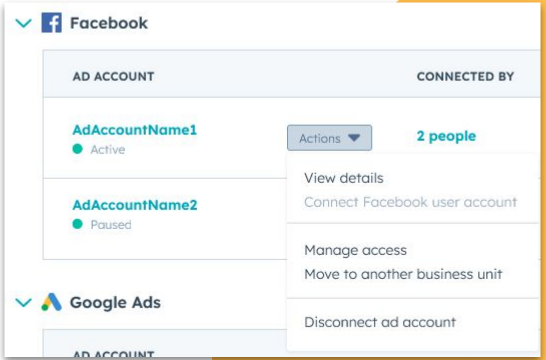
Marketing Hub™

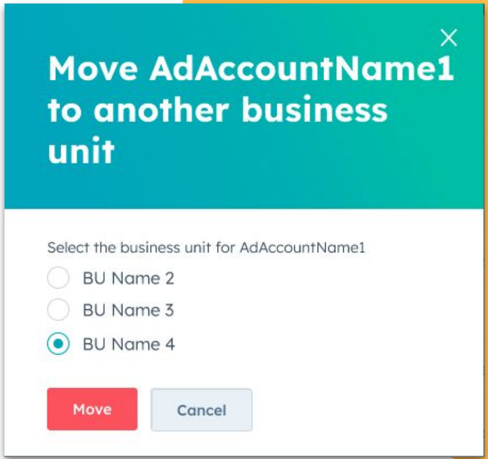
Associate Ad Accounts to Business Units

HubSpot users can now associate their ad accounts with a Business Unit and filter ad assets (including campaigns, audiences, events, lead syncing, etc.) by Business Unit.

Use Case

You can now associate and filter your ad accounts by Business Unit which will enable you to better organize your ad assets per brand.





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

Launch region: Global

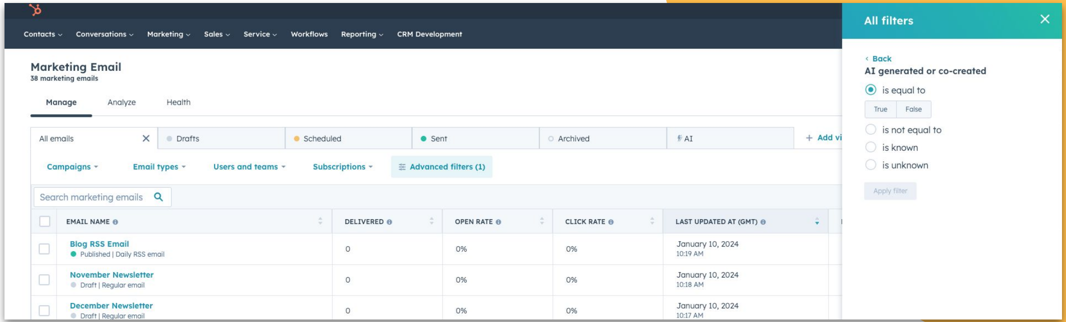
Marketing Hub™

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.



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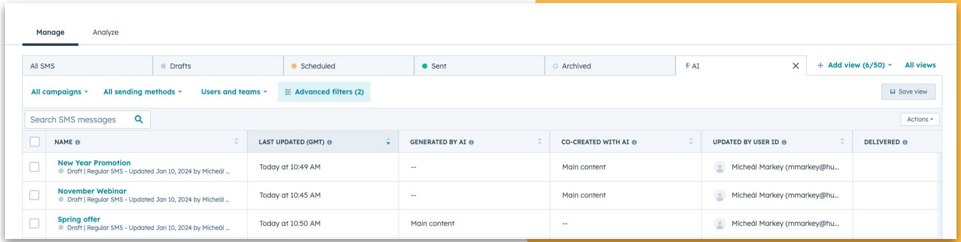
Launch region: Global

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.

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

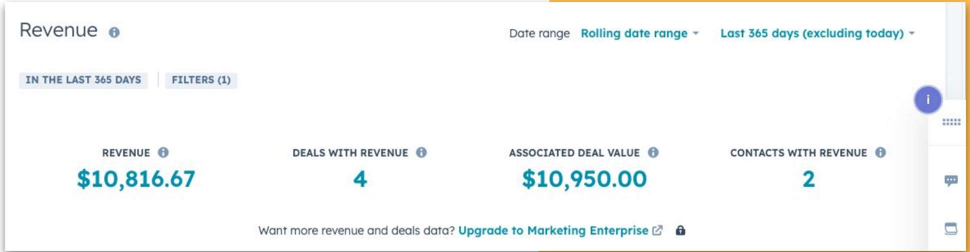
Launch region: Global

Marketing Hub™

Associated deal value: A new metric rolling out for Marketers

Today, we're giving Marketing Pro customers additional insights into the impact of their campaigns on revenue.

Introducing 'Associated deal value' a new metric that sums the total deal value of all the closed-won deals associated with a campaign.



Use Case

We are rolling out our latest metric, associated deal value, to provide further context around the total amount of revenue that is associated with your campaigns.

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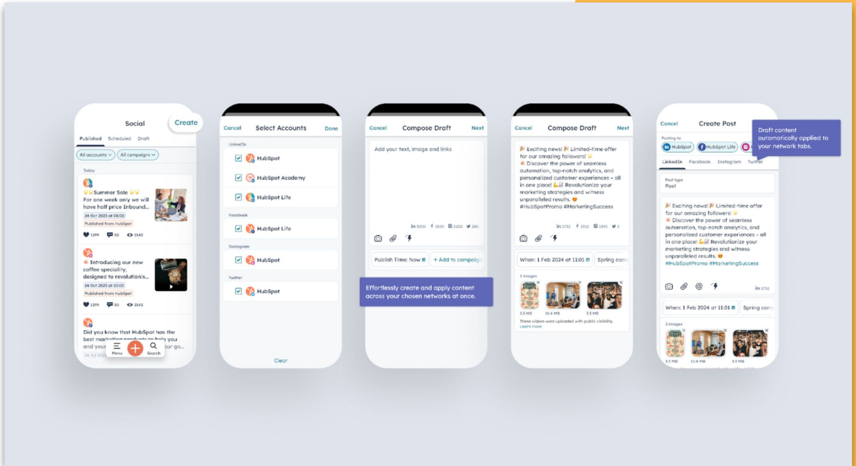
Launch region: Global

Marketing Hub™

Social Composer Draft Experience

Marketers can now create their social posts faster than ever, with the new draft option on iOS and Android. Creating content simultaneously for all your social networks, now it's possible!



Use Case

1. more quickly create and edit posts for all your network, including the publish time and campaign
2. more clearly see existing features and new features at your fingertips for social post creation
3. more easily learn how to create social media posts on mobile, as the new experience follows a familiar pattern & UI in other content creation tools within HubSpot's ecosystem and desktop Social.

[Learn More]

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

Launch region: Global

Linkedin Documents Support

You can now publish and report on Linkedin documents (PDFs).

Use Case

As marketers continue to expand their organic social strategy, creating and distributing various pieces of content is a great way to reach larger audiences and increase engagement. Publishing documents on Linkedin, enables businesses to share pertinent information in a format that is more easily digestible for their audiences. Whether these are reports, case studies or sales information, documents are a great way for marketers to share more informative long form content.

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Launch region: Global

Marketing Hub™

Linkedin Polls Support

This feature enables customers to publish and report on Linkedin Polls.

Use Case
As marketers continue to expand their organic social strategy, creating and distributing various pieces of content is a great way to reach larger audiences and increase engagement. Publishing polls enables businesses to interact with their audiences in a different yet more authentic way, resulting in higher engagement.

Linkedin Polls can be used to ask for feedback, gain valuable market research and analyze trends, understand your customer, and nurture leads.

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Launch region: Global

Marketing Hub™

SPF/DMARC for All

'SPF & DMARC for All' will add SPF and DMARC records to the 'Connect an Email Sending Domain' flow, and expose connection status directly in HubSpot. Customers will now be able to:

- Copy DMARC and SPF records directly from HubSpot to their DNS
- Check the connection status for DMARC, DKIM, and SPF directly in HubSpot

Use Case

Starting February 2024, Google and Yahoo will be requiring DMARC, DKIM and SPF for all bulk senders. Moving forward, any bulk sender who does not have all three authentication measures in place will be blocked or directed to spam. By adding SPF and DMARC to the connection flow, customers will now be able to manage their email authentication directly in HubSpot.

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Launch region: Global

Email Variable Domains

Moving forward, all marketing and transactional emails sent out of HubSpot that do not use a Connected Email Sending Domain will be subject to a variable domain managed by HubSpot. This enables the automatic detection and removal of your unauthenticated domain without canceling the send (though it may negatively affect how your recipients engage with your emails).

Use Case

Starting February 2024, Google and Yahoo will be requiring email authentication for all bulk senders. Emails that are not properly authenticated will be automatically blocked or directed to spam. Our HubSpot managed domains will be fully authenticated with DKIM, SPF, and DMARC. In the event that you are sending with an unauthenticated domain, we can ensure that your email will pass the necessary authentication checks through the variable domain process.

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Launch region: Global

Marketing Hub™

One Click Unsubscribe

Updating email headers to be compliant with one-click unsubscribe requirements.

Use Case

Google / Yahoo have announced that starting February 2024, they will be enforcing one-click unsubscribe. To ensure our emails are compliant we need to make updates to our current email header format. You may see a spike in unsubscribe rates once this is released.

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Launch region: Global

Marketing Hub™

New HubSpot Subdomains

HubSpot is now sending email from subdomains of '@hubspot.com'.

Use Case

Many recipients have inbox routing rules configured to help manage their email. Moving forward, HubSpot emails will come from a variety of subdomains, and we encourage you to be on the lookout for incoming mail.

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Launch region: Global

Marketing Hub™ + CMS Hub®

Add, remove, and regenerate outline subheadings in AI Blog Post Generator

On the third step of the HubSpot AI blog post generator wizard, you can now add additional paragraph headings (up to 10), regenerate outline headings, and remove paragraph headings (minimum of 1) from the outline builder.

Use Case

To give you more control and flexibility over the blog posts you co-create with, AI, we have now added the ability to add up to 5 additional subheadings in the outline step of AI Assistant: AI Blog post generator. Sometimes we don't get it quite right the first time, so you can now use AI to rewrite any of the paragraph headings on the outline builder. You can also remove subheadings from your outlines if you would like fewer than five.

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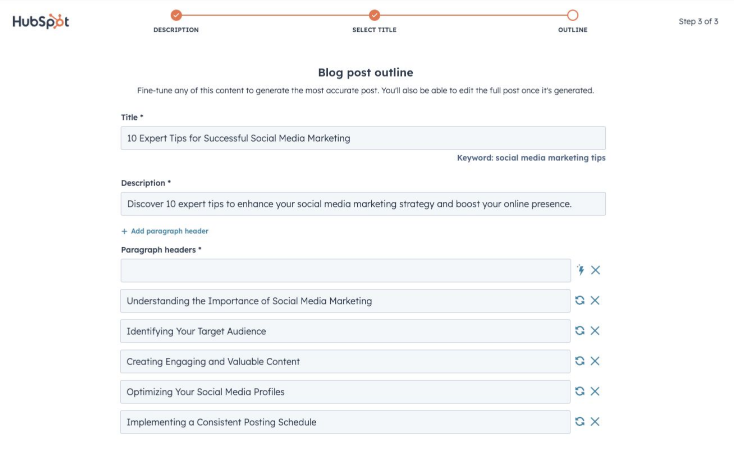
Launch region: Global



Marketing Hub™ + CMS Hub®

Audio Module in Pages & Blog

You can now add an audio module to their website, landing pages, or blog post content and upload any audio file.

Use Case

Adding an audio module to your website, landing pages, or blog post content allows for you to bring both inclusive and interactive content!

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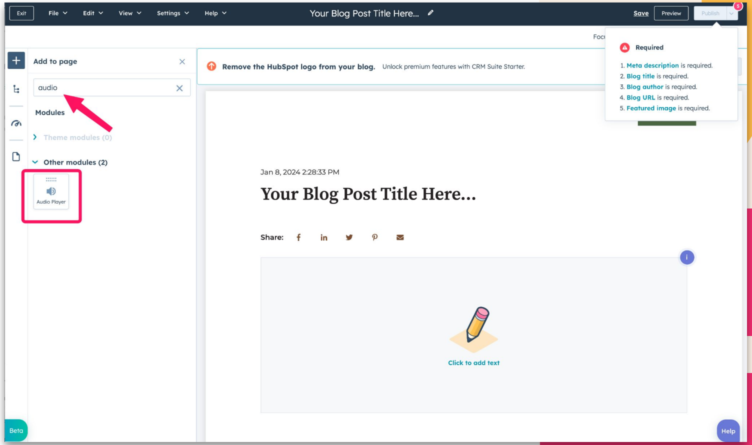
Launch region: Global



Marketing Hub™ + CMS Hub®

Semrush keyword intent data now available in AI Blog wizard

Keyword intent labels are now available in AI Blog post generator. On the second step of the wizard, where we show suggested titles and keywords, we will now show the keyword intents associated with that SEO keyword in addition to the monthly search volume (MSV) and difficulty to rank. It is possible for a keyword to have multiple intents associated with it.

Use Case

Google's goal is to answer searcher's queries as efficiently as possible. So, if your content answers a keyword's search intent, you're more likely to rank for that keyword.

This is why it's important to identify keyword intent before you create a piece of content to target a specific keyword. Surfacing the user intents of keywords we suggest in AI blog post generator can help marketers make more informed decisions about what they want to target.

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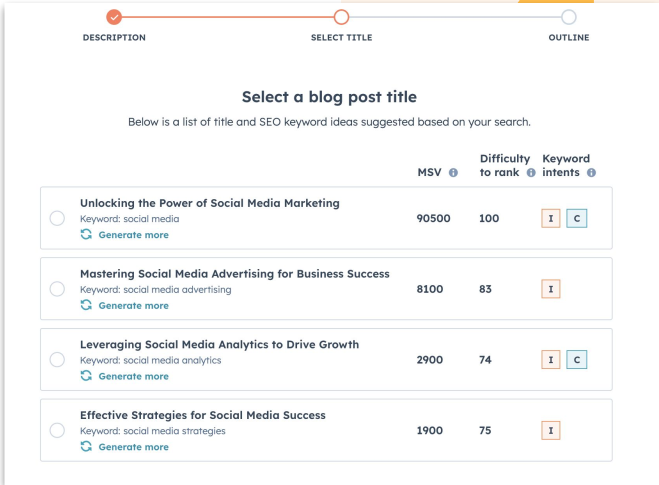
Launch region: Global



Sales Hub™ + Service Hub™

Sales Hub™

Deal Pipeline Rules

You can now set and manage rules for your deal pipelines, allowing you to better manage controls of your pipelines and protect the integrity of your data.

Use Case

Admins can use these rules to manage controls of their pipelines, for improved reporting, stage-driven workflows, and most importantly--data integrity.

The new pipeline rules include:

- **Limit the creation of new deals to a single deal stage.** Once you enable this rule, all new deals will only be created in the selected deal stage.
- **Restrict skipping stages.** Enabling this rule forces each deal to move through every deal stage sequentially in the pipeline. *Exception:* Deals can still be moved directly to "Closed lost."
- **Restrict backward movement.** Enabling this rule will prevent deals from moving backwards.

Learn More

Free Starter Pro Ent Live

Launch region: Global

Sales Hub™

Currencies API

The currencies API is now live and available for use, offering you a new way to manage your multicurrency experience in HubSpot. With the currencies API, you can manage the currencies used in your HubSpot account, including setting your account's company currency, creating additional currencies, and updating currency exchange rates.

Use Case

This API provides HubSpot customers with more options to managing currencies, rather than having to manually enter and update the exchange rates in "Currency Settings". Using the API, you can link to a trusted source for exchange rate updates, and schedule updates, in order to reflect market rates without manual intervention--reducing room for human error or missed updates.

Free Starter Pro Ent Live

Launch region: Global

Sales Hub™

A new experience for the Deals Board on iOS

We're rebuilding the Deals screen in the HubSpot iOS app to make it much more powerful and easy to use.

Use Case

It should be effortless to work in even the largest portals by number of records in the HubSpot mobile app. However, our existing implementation of our "index" screens, i.e. the List or Board presentation of Deals, has a frustrating limitation for portals with more than 10,000 Deals.

Now, we can resolve this limitation with a performant online screen.

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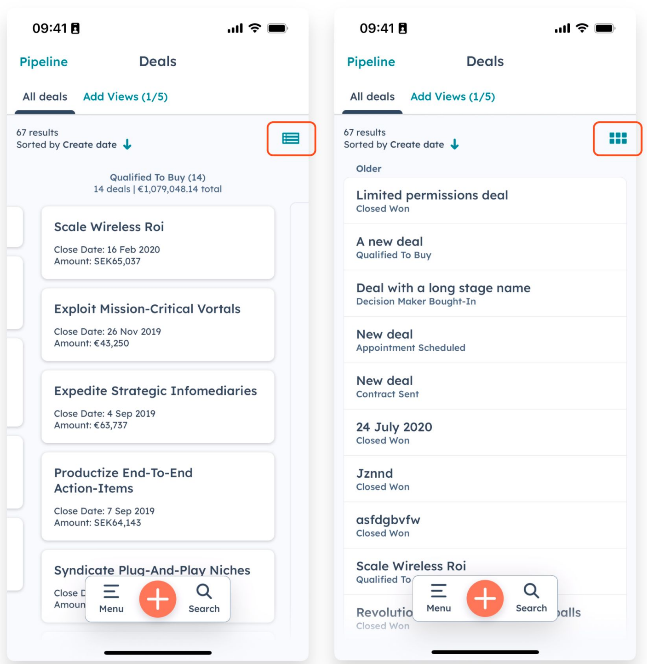
Launch region: Global



NEW
Switch Deals presentation from Board to List on iOS, and sort by any property

Sales Hub™

Mobile Sales Email Enhancements

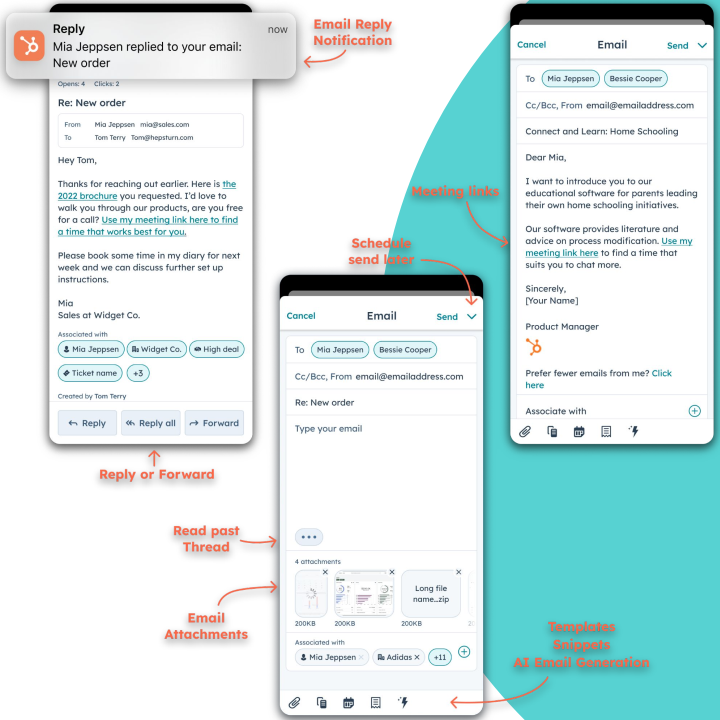
Mobile sales reps can now enjoy an enhanced mobile sales email experience from the HubSpot mobile app when prospecting and selling from anywhere. Early this year we added the ability to reply and reply-all to contacts. Since then we have added many more features to bring the mobile sales email experience to a high standard for our mobile sales reps to benefit from communicating directly with the HubSpot mobile app.

Use Case

Mobile sales reps can enjoy this new enhanced sales email experience by composing and replying/forwarding emails directly from any mobile CRM record (contact, deal, company, ticket or custom object) or from the '+ > email floating menu from the HubSpot mobile app both from iOS and Android platforms.

Free | Starter | Pro | Ent | Live

Launch region: Global



Service Hub™

Skill-based Ticket Routing for Help Desk Emails

Skill-based ticket routing allows matching incoming customer inquiries to the best-skilled agent to resolve the issue quickly. By using associated customer and ticket information, admins can create a set of rules to route to teams and/or users with matching skills. Only available to Help Desk and Service Hub Enterprise customers.

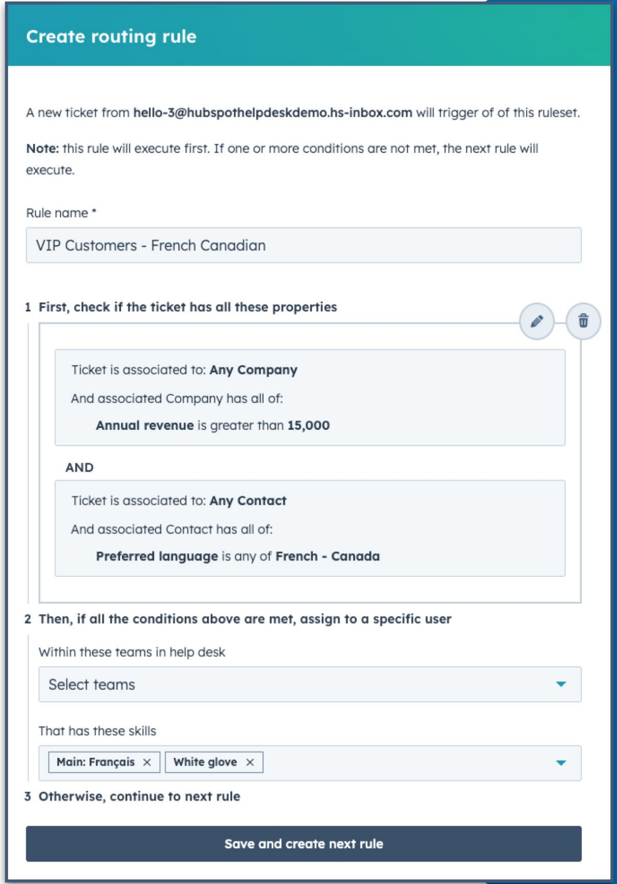
Use Case

HubSpot customers can route more granularly based on the customer, company, email body, etc, than ever before. This also reduces the creation of multiple email domains (support-europe, support-spanish, etc) to shoehorn routing across teams. With this functionality, customers will find it easier to maintain routing rules because even if their workforce changes, routing rules are oriented on skills instead of a list of specific users.

Learn More

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

Launch region: Global



Service Hub™

Move inbox channels and conversations to Help Desk

Admins can now move an existing email or form channel from the inbox to help desk. They can also choose to move historical conversations and associated tickets to help desk when moving the channel.

Use Case

Super Admins can select an email or form channel to move to help desk and whether they would like to move the historical conversations and tickets to that inbox.

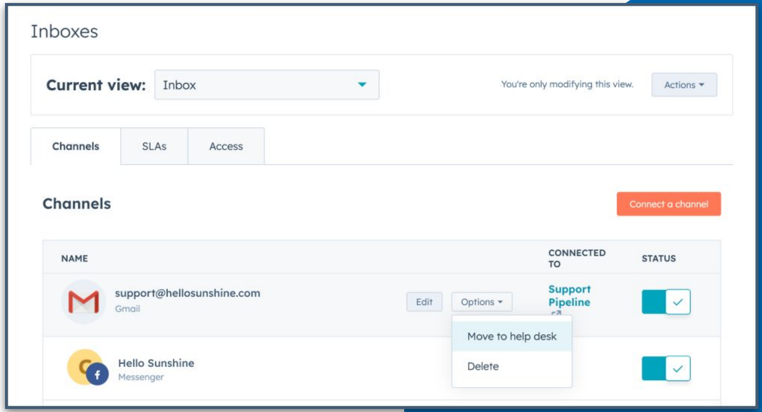
**This feature is available for existing Help Desk customers ONLY*

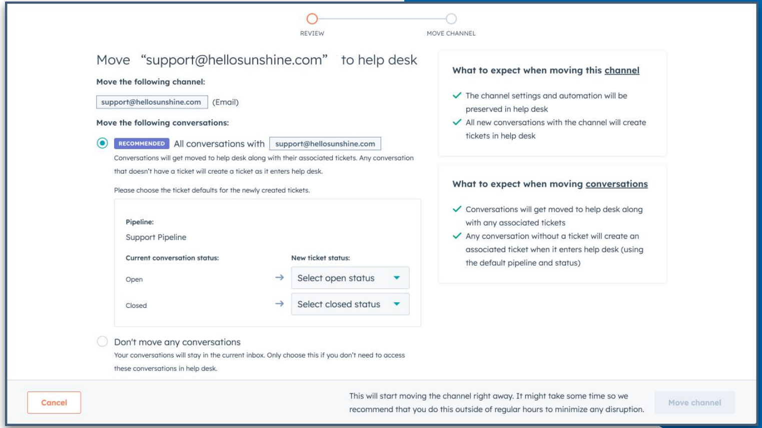
***Only connected email and form channels can be moved from inbox to help desk*

[Learn More]

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

Launch region: Global

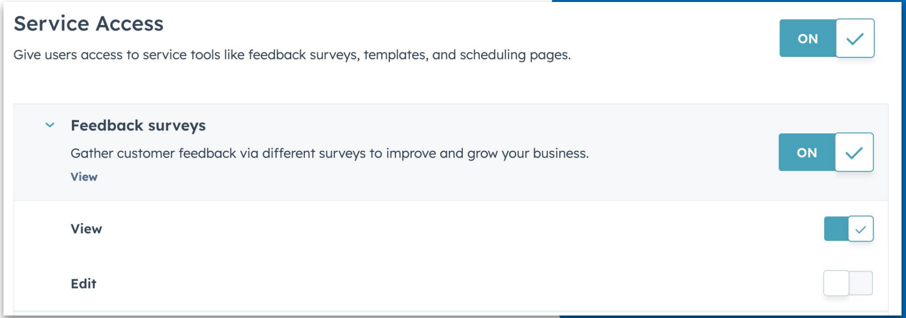




Service Hub™

Explicit View/Edit Permissions for Feedback Surveys

With this change, Admins can control whether a user who has "Service Access" should be able to access "Feedback Surveys" or not. This change also enables Admins to grant explicit permissions for Viewing and Editing feedback surveys.



Use Case

Customers would like to offer permissions to create, edit, publish feedback surveys to only certain team members rather than providing access to all service team members. This could ensure that only the right team members reach out to customers to collect feedback.

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Launch region: Global

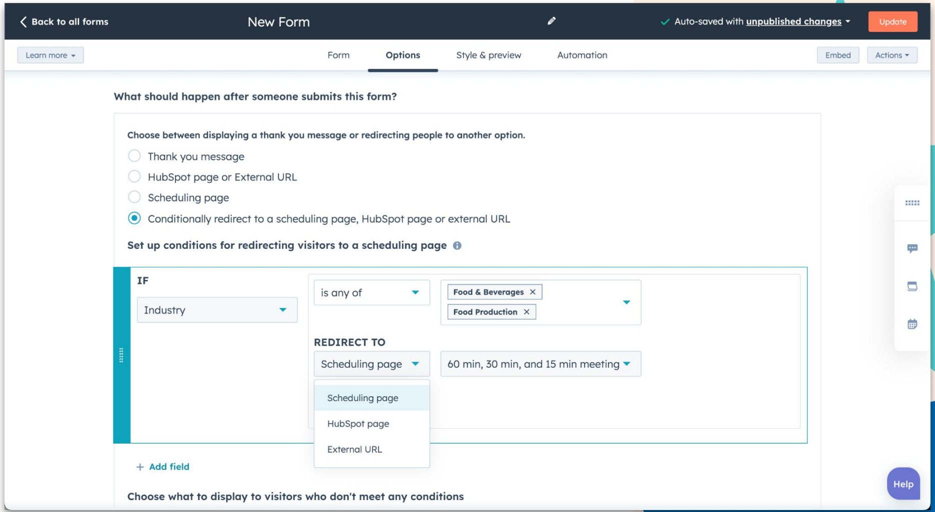
Sales Hub™ + Service Hub™

Conditional Form to URL Routing

After form submission, redirect visitors to a meeting scheduling page, a HubSpot page or an external URL. You can either redirect all visitors to the same destination, or set up conditions for redirecting visitors to specific destinations based on any form fields (e.g. region, company size, revenue etc.).

Use Case

Like routing prospects to the right scheduling page based on any form fields (regions, company size, revenue, etc.), automate rules to decide who gets to book time immediately on a calendar, you can now do the same for HubSpot pages and external URLs giving you the tools to personalise your prospects experience.



[Learn More](#)

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Launch region: Global

HubSpot

Sales Hub™ + Service Hub™

Customized Reminder Emails in Meeting Scheduling Pages

Previously, all reminder emails were sent as the same basic template leading up to a meeting. Now, HubSpot users are able to provide more customization and personalization in reminders for meetings booked through scheduling pages.

Use Case

Prior to an upcoming meeting booked through a scheduling page, attendees can receive a customized reminder email with important information needed for the meeting, links to join the meeting, and anything else that might be important to call out or share in advance.

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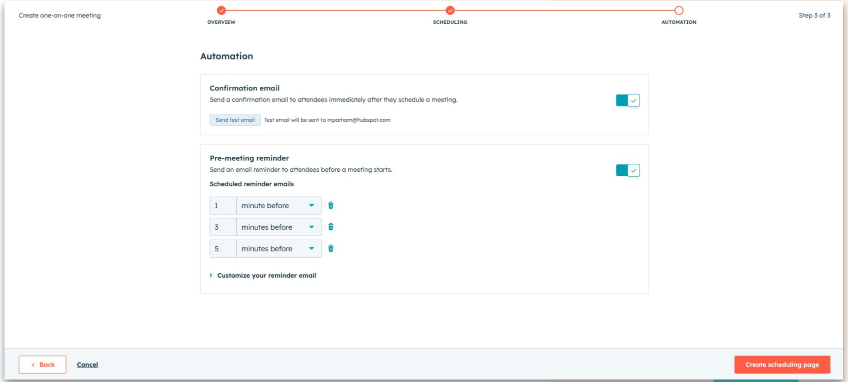

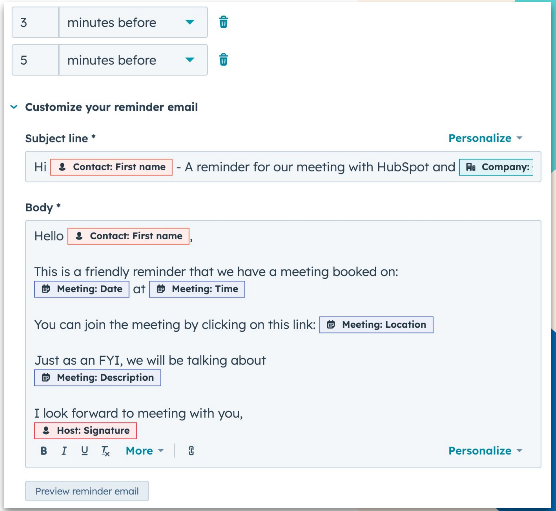

HubSpot

Sales Hub™ + Service Hub™

Enroll contacts into a sequence from a company or deal on the HubSpot Mobile App [iOS and Android]

You are now able to enroll contacts into a sequence from the company or deal record.

Use Case

Not every company engages from the contact. You might be doing ABM selling, where you focus on companies. Your sales reps solely work deals, in which case all customer communication happens on the deal record.In these circumstances, one had to find the right company or deal, navigate to associations, tap on the contact AND THEN engage with the contact.

Not anymore. With this change, we have streamlined you sequence enrollment and meeting you where you work.

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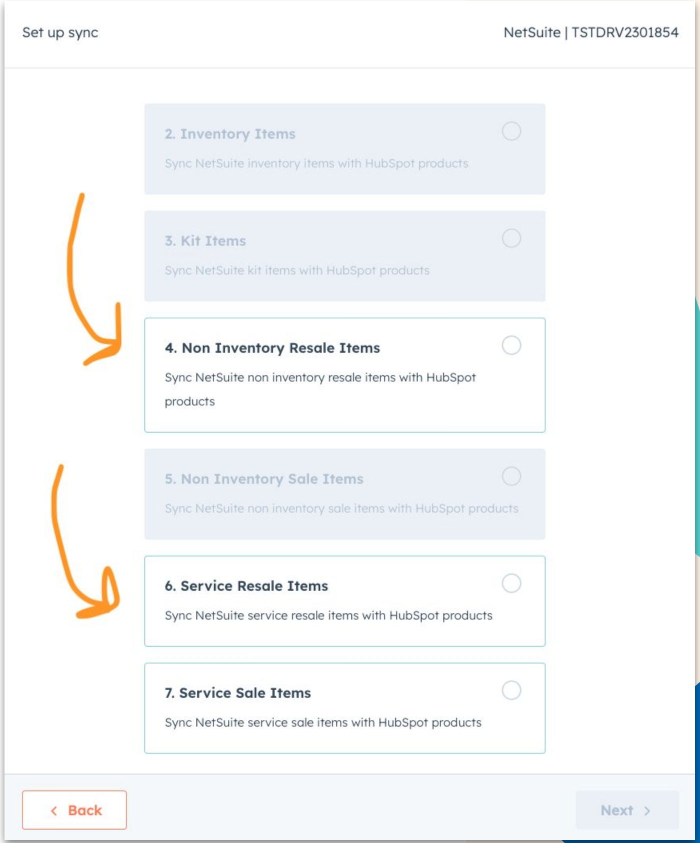
Launch region: Global



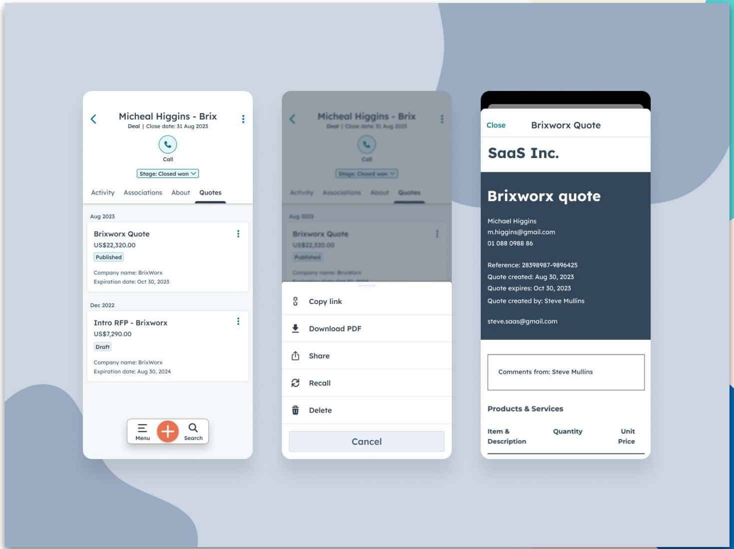
Sales Hub™ + Service Hub™

View, Delete, Share and Recall Quotes on Mobile [iOS and Android]

Customers on mobile now have the ability to view, delete and recall quotes from the HubSpot Mobile apps. The feature can be accessed from the Deal record.

Use Case

Quotes fulfill a key part of this sales journey. With this update, you have access to all of the quotes that you have created on desktop visible on mobile for easy access.



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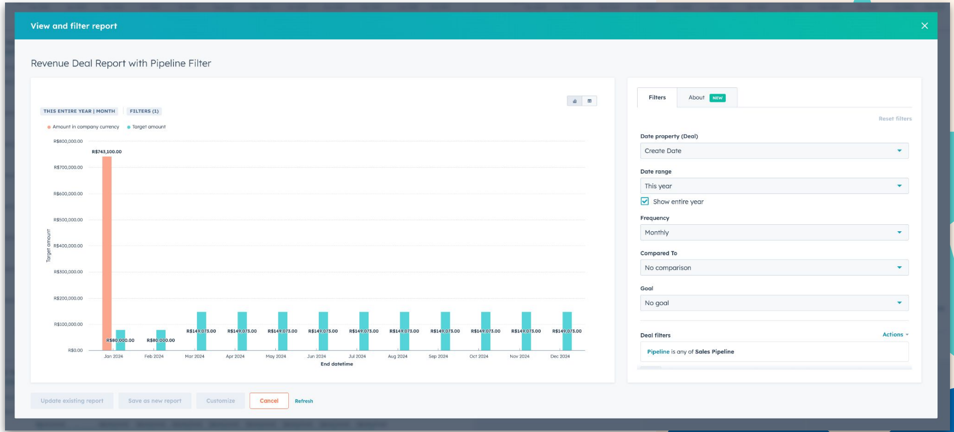
Launch region: Global

Sales Hub™ + Service Hub™

Deal Goals available in the Report Viewing Experience

Goal Target data for all Deal based goals is now available in Deal-based, time series reports, with a single dimension (y-axis). Report users can add Deal based Goal target data to their report via a new Goal selection drop down available when a deal based report is viewed in the “View and filter report” experience. Bar, Column, Line, and Area charts are supported.



Use Case

Goals provide valuable context to reports, and help build accountability and ownership. While the Goals app allows users to track all their Goals, we frequently heard from customers that viewing Goal Targets in Dashboard Reports would enrich reports in a meaningful way, providing better contextual insights into progress, and the ability to take action on it.

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This feature is available to all reporting users; however, please note, Goal templates are available at Pro+, and Custom goals are available at Ent tiers.

Launch region: Global

Sales Hub™ + Service Hub™

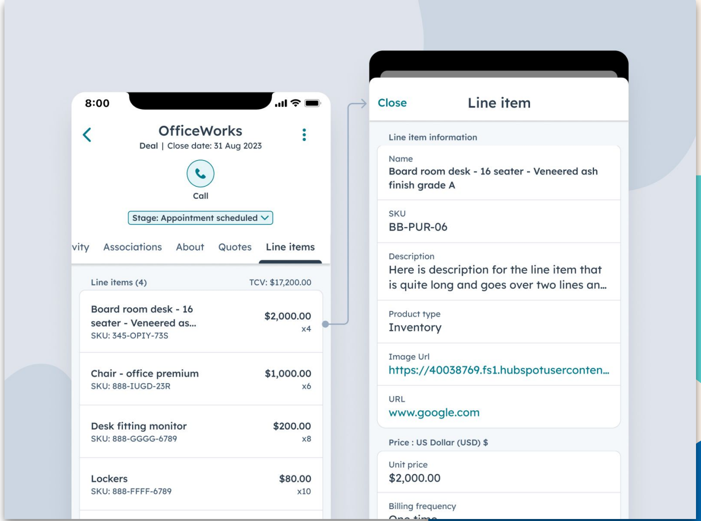
View Line Items on the HubSpot Mobile app [iOS and Android]

Once you update your HubSpot Mobile App to the latest version, you will have access to the Line Items tab within the Deal record.

Use Case

Sales reps on mobile now have visibility into any line items they have associated with their deals.Selling doesn't happen while you are seated at your desk with the laptop open. Sales reps are constantly on the move and opportunity knocks when you least expect it. This means that having complete visibility into your sales cycle is crucial to gain context or prepare.

If you don't have that visibility, that's a missed quota for you and lost revenue for your company. Line items play a crucial role in the sales cycle, providing reps with visibility into the state of their deal, no matter where they are.



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Launch region: Global

Sales Hub™ + Service Hub™

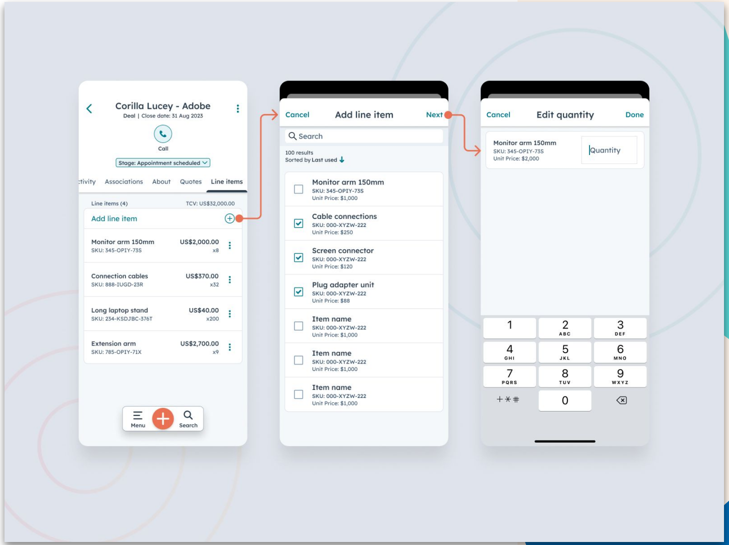
Add, remove or delete line items from Deals and Quotes on Mobile [iOS and Android]

Customers can add or remove line items from the Deal record as well as add or remove line items from Quotes.

Use Case

Line items are a critical part of the sales process and our customers expect to have flexibility in how they can manipulate line items no matter where they are.

At a customer meeting, you might want to increase the quantity of line items on a quote. Or, you might want to add line items from your product library based on requirements from the customer.



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Sales Hub™ + Service Hub™

Channel Accounts now listed as Conversation property in the Inbox

Companies with enough business complexity offer and segment support across multiple email addresses, multiple chat flows, and multiple WhatsApp numbers. Their support reps and admins might want more granularity in filtering conversations at the channel account level. Customers can now access their full conversation data to serve their needs.

Use Case

Today customers can view Channel data on the Conversation object (e.g. Email, LiveChat, Facebook Messenger, WhatsApp).

The Channel Account property is available anywhere throughout the platform where it is possible to filter by conversation properties including:

- In reporting
- In custom view filters

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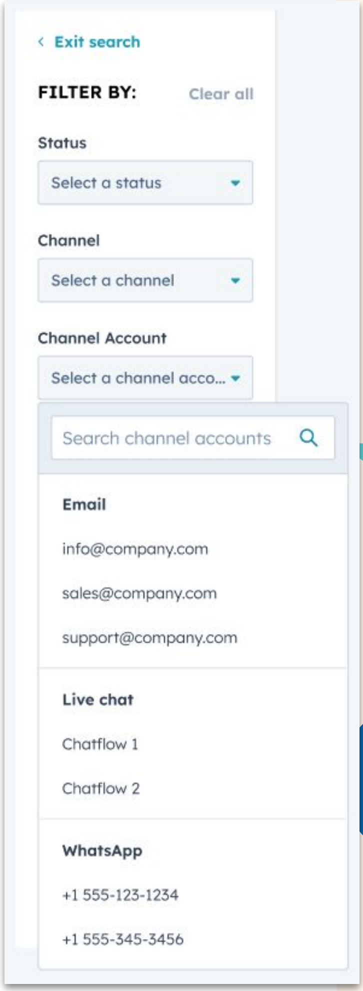

Operations Hub™

Operations Hub™

Proactive Alerts for New Duplicates

Introducing the ability to proactively monitor new duplicates and receive notifications. This includes an addition to data monitoring in the data quality command center. Users will also have the ability to subscribe themselves and other users to notifications triggered by the new duplicate alerts.

Use Case

The new customizable duplicate notification allows operations managers to stay on top of duplicate records without getting distracted by insignificant changes. By selecting whether to monitor companies, contacts, or both, the frequency of notifications, and who receives them, users can focus on duplicate spikes that matter. This prevents getting overwhelmed with unactionable alerts so Ops teams can efficiently prioritize major duplicate issues impacting data quality.

[Learn More]

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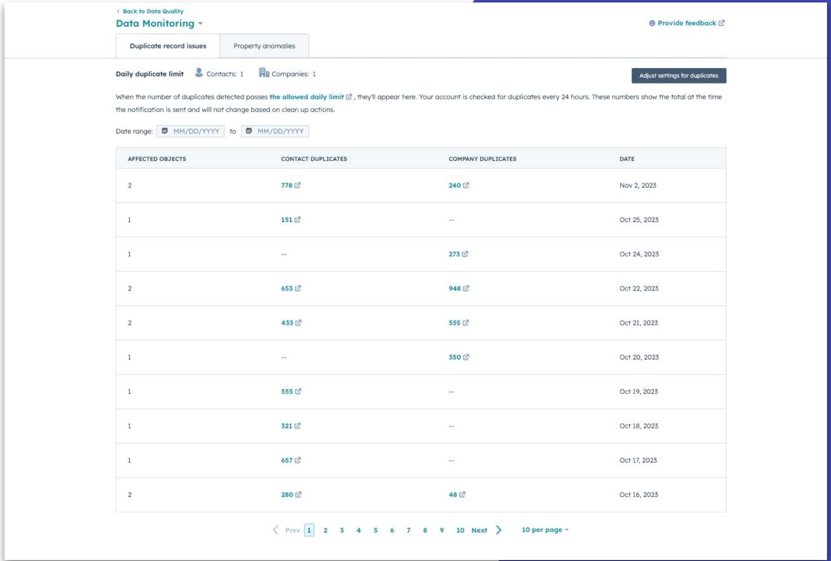


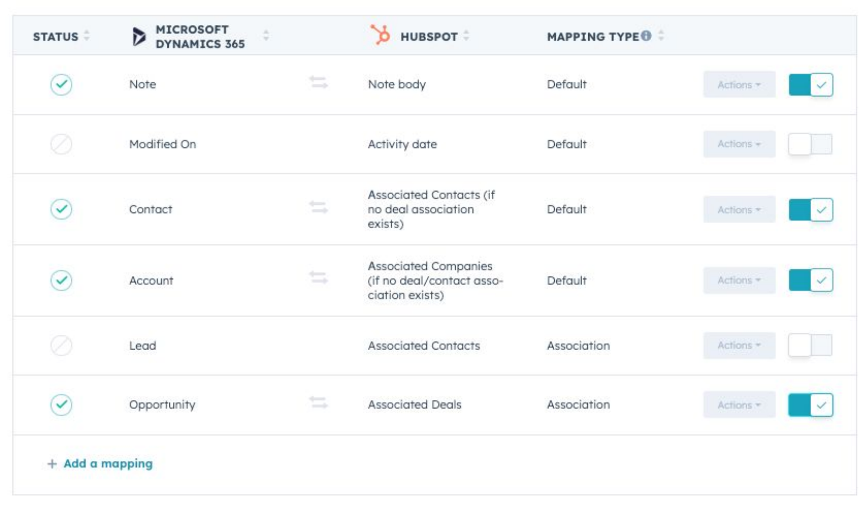
Operations Hub™

Two-way activity sync for more data sync apps

We're unlocking two-way activity sync for some existing data sync apps that prior were only syncing their data inbound. The data sync apps benefiting from this update are Copper, Zoho CRM, Microsoft Dynamics and Outreach.

Use Case

We have expanded our capabilities to now support outbound synchronization of activities between HubSpot and several data sync applications.



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Launch region: Global

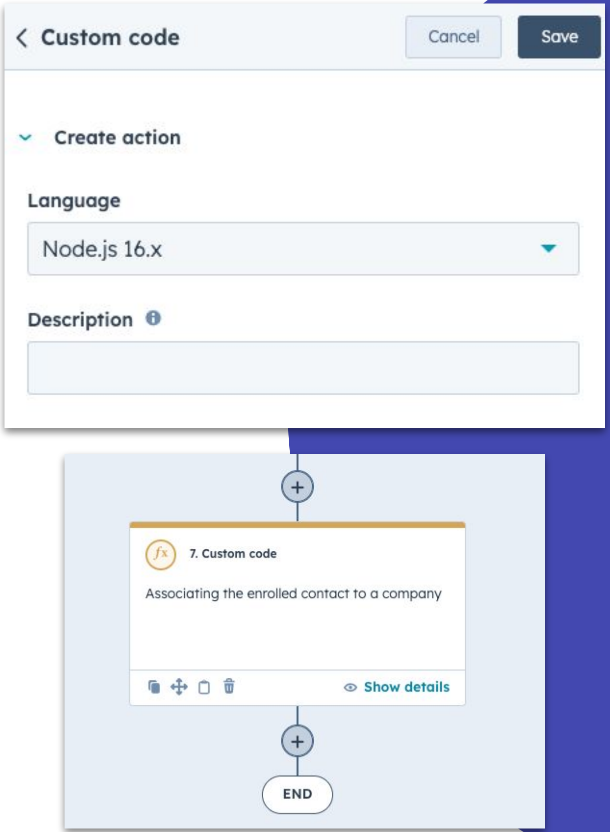
Operations Hub™

Custom Code Descriptions

You can now provide an optional description for your custom code action that will also display on the action card when viewing your workflow.

Use Case

The ability to provide a brief description of the action creates a more straightforward workflow-building process, while also encouraging better collaboration amongst teams of varying skillsets and levels.



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Operations Hub™

Data Sync search by email address

We're happy to announce the release of new feature improvements for our existing Data Sync monitoring tool. These enhancements are designed to provide you with even more control and flexibility when it comes to analysing your data.

- We have introduced the ability to search contact records using the email address, expanding the search capabilities beyond name parameters and IDs.
- You can now choose to display 25, 50, or 100 records per page on the record view of our sync performance tool, aligning this feature with the search experience in the CRM.
- We have tweaked the processing animation on the record view, making it more clear the sync is in a processing state.

Use Case

Every active Data Sync connection has its own sync performance overview, showcasing the specific records that are being synchronised, as well as those that are not. Continuous improvement of this functionality is essential in enabling customers to easily conduct their own investigations.

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Launch region: Global

Commerce Hub™

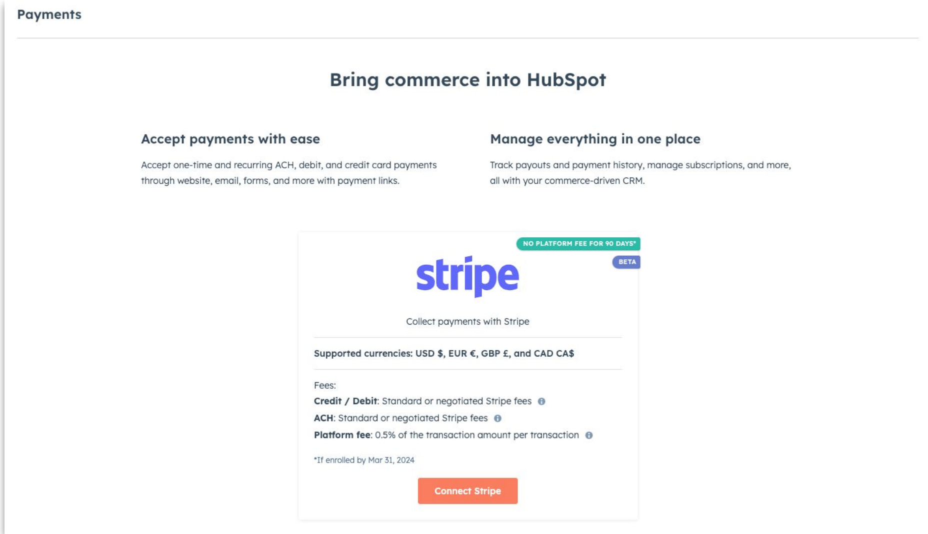
Commerce Hub™

New Stripe payment processing (BETA) now available in HubSpot Free Tools

The new Stripe payment processing (BETA) is now available to accounts with HubSpot Free Tools.

Use Case

The new Stripe payment processing (BETA) is now available for accounts with HubSpot Free Tools, enabling you to collect payments within the CRM and leverage Commerce Hub billing and invoicing features. Using Stripe as your payment processor allows you to accept credit card or ACH payments from your customers seamlessly.



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Launch region: Global

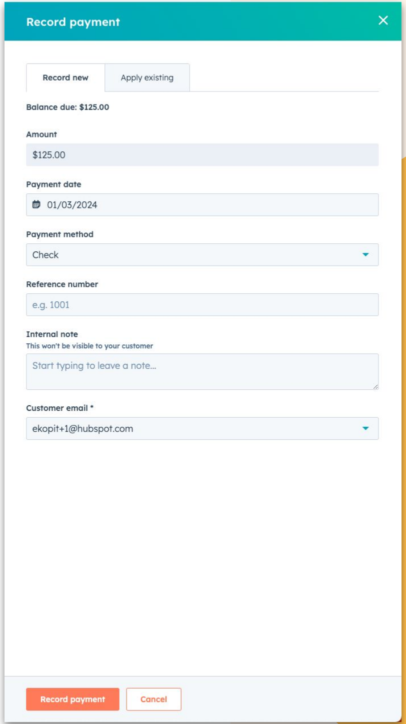
Commerce Hub™

Record Payments Manually for Invoices

This feature enables HubSpot Invoices users to create payment records manually for invoices, or add associated existing payment records to invoices to "pay" them. This functionality replaces the "Mark Paid" functionality, since it achieves the same goal (i.e. indicate that an invoice was paid and is no longer due), but also facilitates the creation/maintenance of clean, rich payment data.

Use Case

Invoices users can "Record Payment" on their Invoices, which will allow them to create a new payment record manually, or associate an existing payment to an invoice to "pay" it. This enables users to run 100% of their billing and payments from HubSpot, even when payments are collected outside of HubSpot Payments (e.g. check payments, wire transfers, etc.).



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Launch region: U.S. Only

***As of September 6, 2023, Commerce Hub is available to all US-based customers at our free and above tier. We plan to expand availability globally within the coming months. If you're an international customer interested in Commerce Hub, please [join our waitlist](#) to be notified when it's available.*

CRM Platform

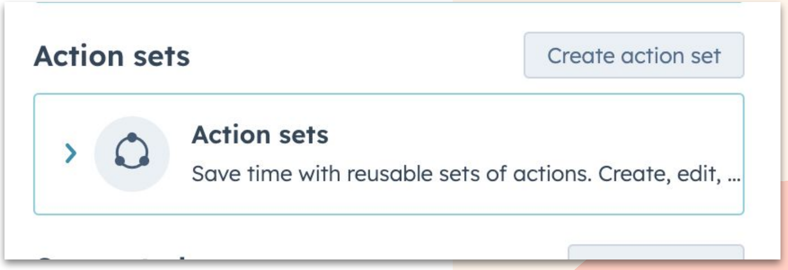
Save and reuse groups of workflow actions with Action Sets

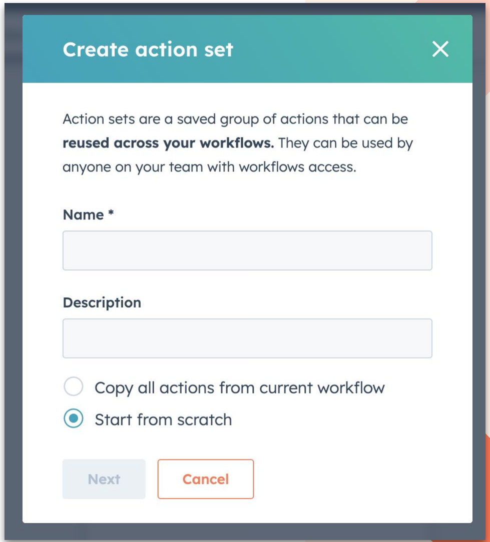
You can now save a group of workflow actions into an Action Set so that you, and the rest of your team, can re-use.

Action Sets are available for all Enterprise portals with workflows access.

Use Case

Action Sets not only speed up the process of creating workflows but also give your workflow admins the ability to create guides for the rest of their teams to leverage while they're making workflows!





[Learn More]

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Launch region: Global

CRM Platform

Updates to Custom Object & Property Limits

As part of our commitment to meeting the evolving needs of HubSpot customers, we are releasing a series of limit updates and new add-ons designed to empower data-intensive use cases. With expanded product limits, HubSpot scales with you, ensuring a seamless experience at every stage of your journey.

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Launch region: Global

Custom Objects

- Increased portal limits that **will be applied and enforced across all enterprise portals starting January 4, 2023.**
  - All enterprise-tiers will receive an additional 500,000 custom object records. The newly enforced limits are:
    - Operations Hub Enterprise: Up to 20 custom object definitions, **1,500,000 total custom object records**, and 100 custom object pipelines.
    - All other Enterprise subscriptions: Up to 10 custom object definitions, **1,000,000 total custom object records,** and 50 custom object pipelines.
  - If your portal requires more custom object definitions, records, or pipelines, you will need to purchase the Custom Object Add-on.
- Changes to the Custom Object Add-on **that go into effect on January 4, 2023.**
  - Define 10 more custom objects and store **1,000,000 more records across all of your custom object** definitions in HubSpot.
  - Maximum capacity of 59 capacity packs and 50,000,000 custom object records per account.
  - Available as a limit increase to Enterprise editions of Marketing Hub, Sales Hub, Service Hub, CMS Hub, or Operations Hub.

Custom Properties

- New! Custom Properties Add-on **available on January 4, 2023**
  - Increase your included custom properties limit by increments of 500 custom properties.
  - Purchase multiple limit increase packs for more volume.
  - Maximum capacity of 3,000 custom properties per object (contact, company, deal, ticket, custom object, etc) per account.
  - Available as a limit increase to Professional and Enterprise editions of Marketing Hub, Sales Hub, Service Hub, CMS Hub, or Operations Hub.

Calculated Properties

- Changes to Professional-tier limits for all Hubs **that go into effect on January 4, 2023.**
  - We are raising professional tier calculated property limits from 5 calculated properties to 25 calculated properties per portal.
- New! Calculated Properties Add-on **available on January 4, 2023**
  - Increase your included calculated properties limit by increments of 25 calculated properties
  - Purchase multiple limit increase packs for more volume.
  - Maximum capacity of 500 calculated properties per account.
  - Available as a limit increase to Enterprise editions of Marketing Hub, Sales Hub, Service Hub, CMS Hub, or Operations Hub.

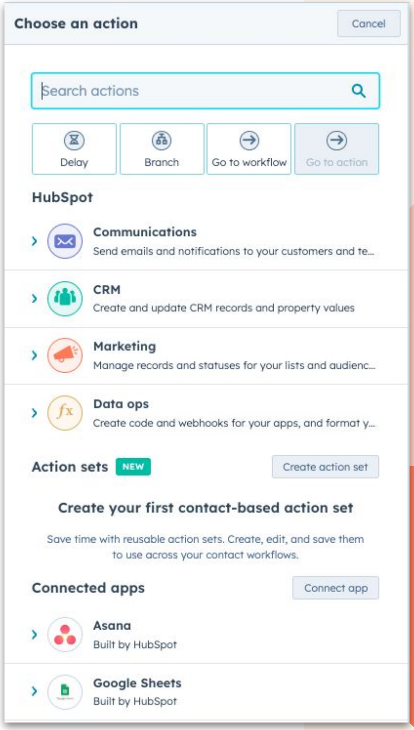
CRM Platform

Redesigned Workflow Action Experience

The workflows tool has gotten a new, updated look.

Use Case

- Redesigned action and trigger cards to help keep the overall view concise and focused on the most important details
- A reorganized action panel, removing the long unruly list of actions and providing a more structured and searchable list
- Improved contextual guidance to help choose the right action for the right job
- An easier path to discover, connect and use workflow integrations



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Launch region: Global

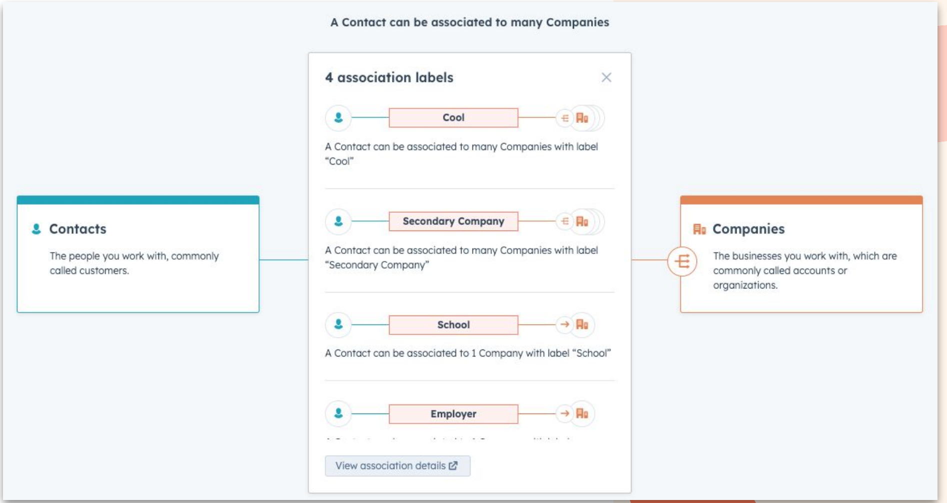
CRM Platform

Visualize Associations

A visual representation of associations between object types including association labels and limits. Additional information is now easily accessible about association labels within the data model overview and we've added a new, associations-specific view.

Use Case

Associations can be confusing. As we've added more complexity to that system with a web of labels and limits, customers need some way to easily understand what's configured and how it will impact their users.



[Learn More]

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Launch region: Global

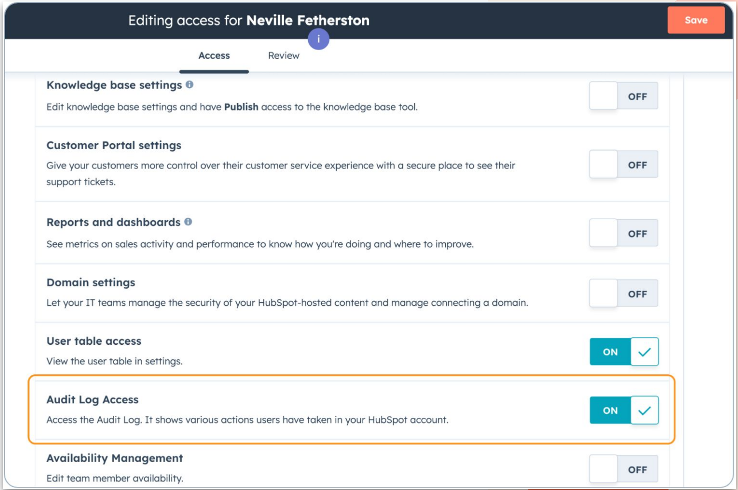
CRM Platform

New permission setting to control who can access audit logs

HubSpot users who have the 'Audit Log Access' permission toggled on can view the Audit Log feature in their HubSpot account.

Use Case

By default, only Super Admins can view their account's Audit Log. Now there is a permission setting to indicate any other user on the account who should have that ability.



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Launch region: Global

CRM Platform

New Permissions setting to control who can create, edit subscription types

The ability to create and/or edit subscription types on the Subscriptions settings page is now separated from the marketing email permissions.

With this rollout, HubSpot users who have the 'Add & edit users' permissions can now disable the ability to create and/or edit subscription types for new and existing users in their HubSpot account within the Marketing tab.

Use Case

Not every portal user in HubSpot should have the ability to add, edit, or delete email subscription types. Now you have a permission setting to indicate who should and should not have that ability.

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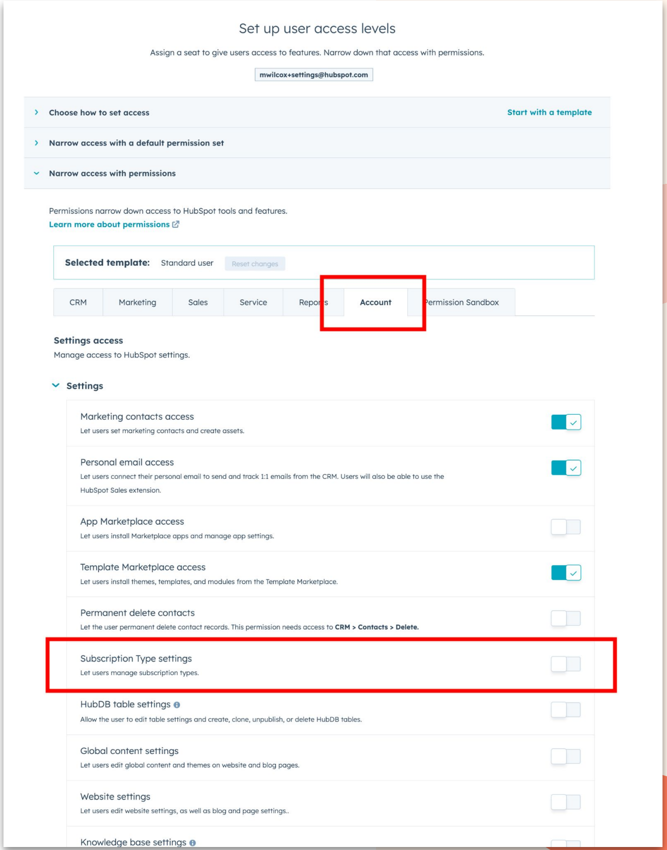
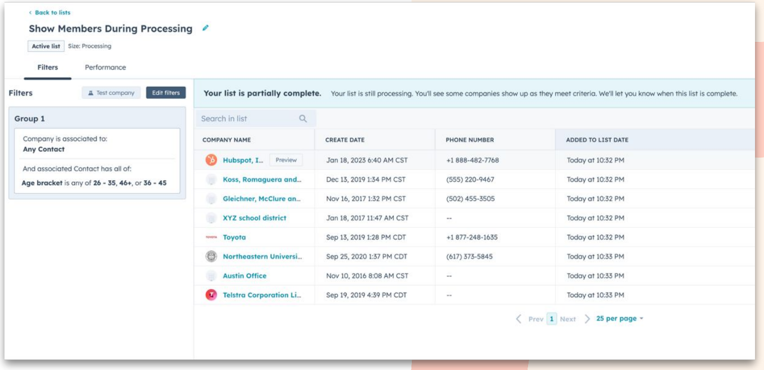


New list creation flow & the ability to sort by when records were added

Three key updates to the list creation experience:

- See records that meet your filter criteria while your list is still processing
- See all records that meet your filter criteria as soon as a list is complete
- Sort by the 'Added to List Date' column on any list



Use Case

1. See records during list processing: When creating a list, it can be helpful to analyze a few records to ensure they match your criteria expectations.
2. See all records when a list is complete: As soon as a list is complete, you will see all the records in the table that match the final list count. Thus you can feel confident when using your list for emails, reporting, or automation.
3. Sort by 'Added to List Date' column: Once a list is complete, sorting by the 'Added to List Date' helps you better track the performance of your lists over time.

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Launch region: Global

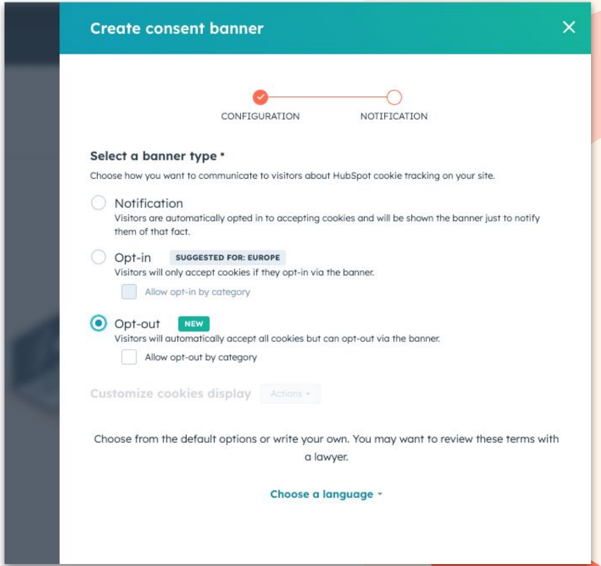
CRM Platform

Opt-out cookie consent banner type

The new 'opt-out' banner broadens HubSpot's cookie management toolkit, specifically for areas with more lenient data privacy regulations compared to the EU. It permits cookies to track visitors by default, while still empowering them to opt out at any point.

Use Case

As cookie management regulations differ globally, HubSpot's 'opt-out' banner provides a flexible alternative to the 'opt-in' banners required in strict regions like the EU. This feature supports default user tracking with the ability to opt out, aligning with less stringent compliance standards and optimizing data collection in applicable regions.r.



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Launch region: Global

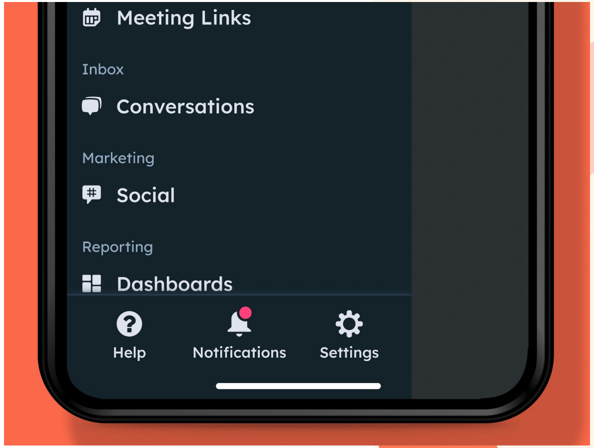
CRM Platform

Unread notifications indicator

The unread notifications indicator gives you a way to see at a glance if you've got unread push notifications without having to navigate to the mobile notification centre.

Use Case
The unread notifications indicator allows users to take control, while simultaneously making it easier for them to check their messages.

**available on iOS and Android*



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Launch region: Global

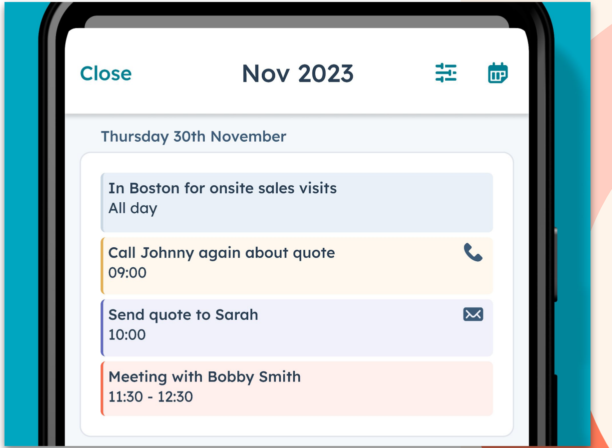
CRM Platform

All your To-Dos in one place! Meetings + Tasks now on Mobile

Mobile Calendar made it simpler to view and create new meetings on the go. Now you can view your tasks for the day in the same place too!

Use Case

Up until now, viewing tasks and meetings were two separate items on mobile. To see meetings, you would need to tap into your calendar. To view tasks, you would need to go back in the home screen and tap into tasks. We've make it easier to take control of your schedule by combining meetings and tasks accessible from the same screen.



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Launch region: Global

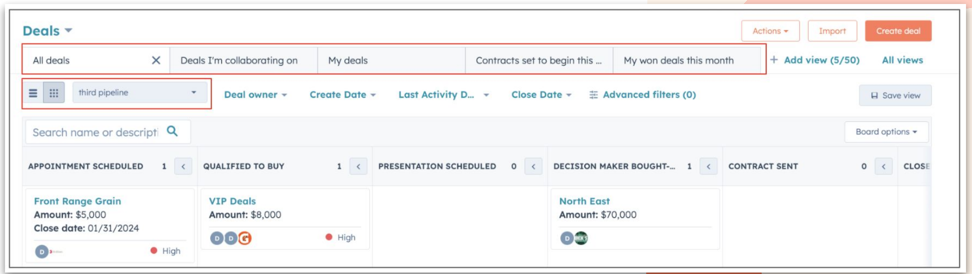
CRM Platform

Consistent Navigation on Table and Board Index Pages

With this update you will now see consistent navigation between table and board views.

Use Case

For those that use both Table and Board visualizations on an Index page, you may have noticed that navigating within these two visualizations is quite different. This update will make the board navigation consistent with the table navigation, making it more clear which board view and which pipeline are selected.



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CRM Platform

Customize default deal name

Admins can now customize the default deal name for deals created from existing contact and company records (and custom object records for Enterprise customers). Customers will be able to configure the default deal name using a combination of personalization tokens and/or static text.

Use Case

Currently the default deal name for deals created from existing contact and company records adds the string "-New Deal" to the end of the company or contact name, which is both inflexible and contributes to data quality issues. Now admins can configure the default experience to fit their unique naming conventions while also helping to reduce data quality issues. Reps can spend less time on manual data entry while ensuring they're following the right naming conventions.

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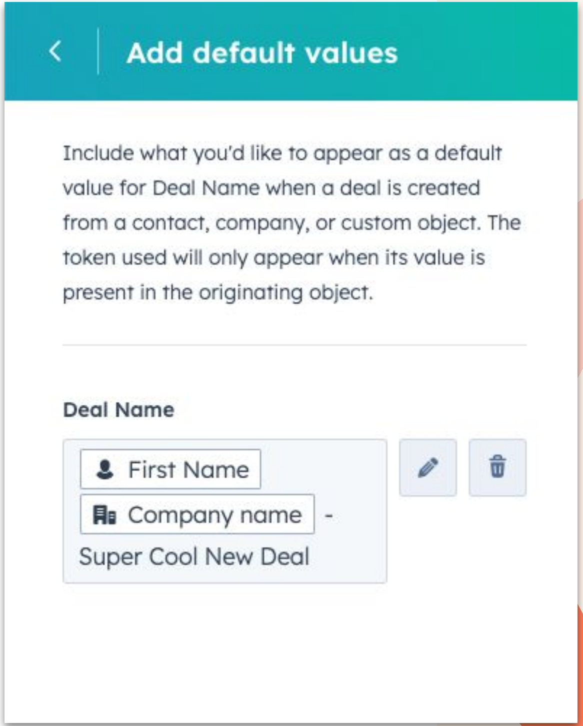

Suspicious Login Alerts

Suspicious login alerts are a new notification sent via email when we detect that a user is accessing HubSpot in a way that is unfamiliar or risky for them. We will send an email to any admin on an account with these alerts enabled that details the user's login, so an admin can quickly follow up if there's anything unexpected going on.

Use Case

Admins today lack visibility into how their users log into HubSpot, especially in the case where those logins could be unexpected, and a precursor to misuse of the product. Without real-time notifications when these kinds of things occur, it's difficult for admins to react quickly to a potential incident or follow up with users to make sure all is well.

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Launch region: Global

CRM Platform

Conditional Property Options for HubSpot-defined Properties

You can now define conditional property options that will be reflected across the CRM for certain HubSpot-defined properties. This will enable you to filter down the options that can be selected for a given property based on the value of another property.

For example: If "Deal Pipeline" = "Sales Pipeline", then for "Deal Type", only show "New Business".

Use Case

This feature improves the data-entry experience by allowing admins to surface only the relevant property options to a user. This feature also gives admins greater control over data quality by letting users know when there are mismatched options, and preventing them from saving incorrect options.

[Learn More]

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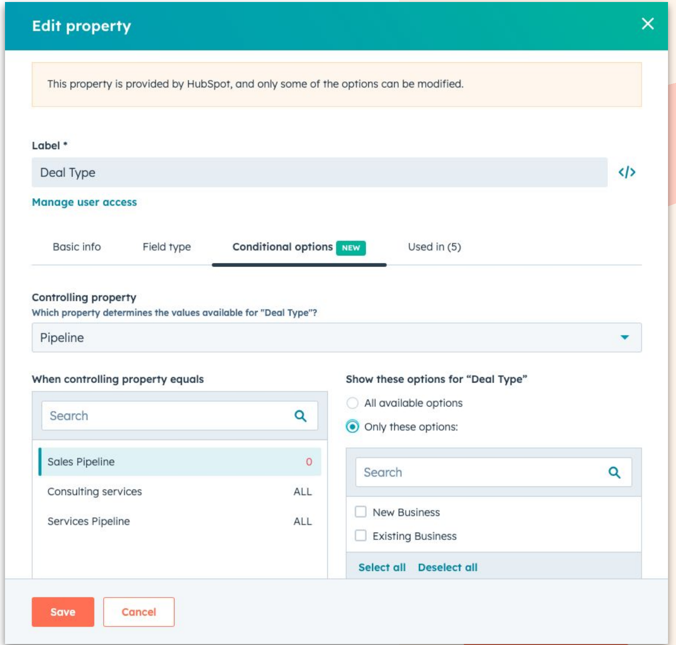


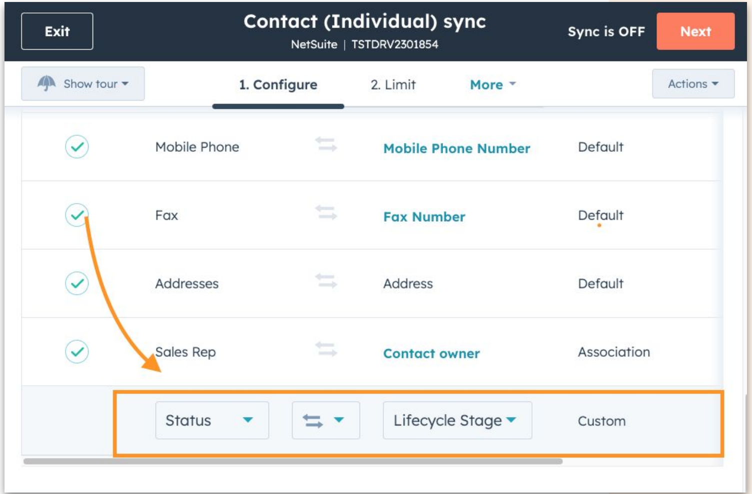
App Marketplace & Integrations

Sync NetSuite Status Field to HubSpot

The NetSuite status field is now available to sync two-way for contacts and companies with the Netsuite app for HubSpot.

Use Case

With the status field in the NetSuite app for HubSpot, you can now categorize your marketing leads into NetSuite as leads, prospects as prospects, and customers as customers.



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App Marketplace & Integrations

Enroll in a HubSpot Sequence and Book a Meeting from NetSuite and Microsoft Dynamics

Enroll in a sequence directly or book a HubSpot meeting directly from within NetSuite or Microsoft Dynamics 365.

Use Case

If you're using NetSuite or Dynamics 365 as your CRM and HubSpot for prospecting, you can now enroll in a sequence or book meetings from a contact, lead, prospect, or customer in NetSuite through the HubSpot Embed. No need to jump back and forth between HubSpot and NetSuite like before.

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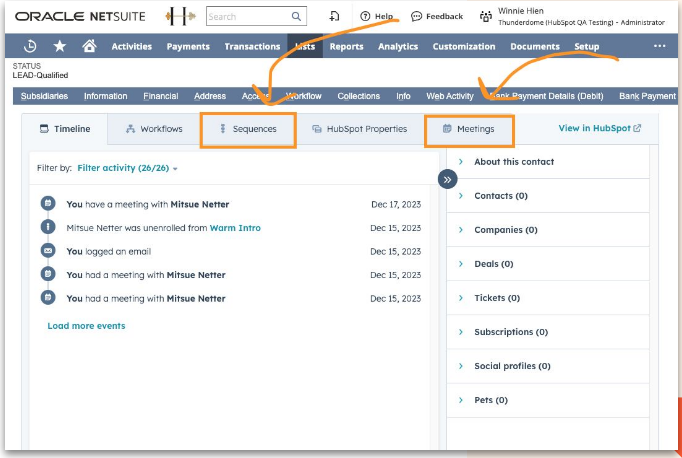
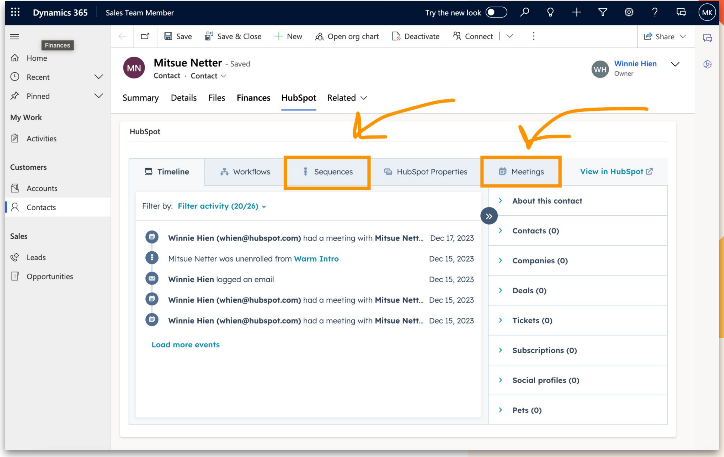




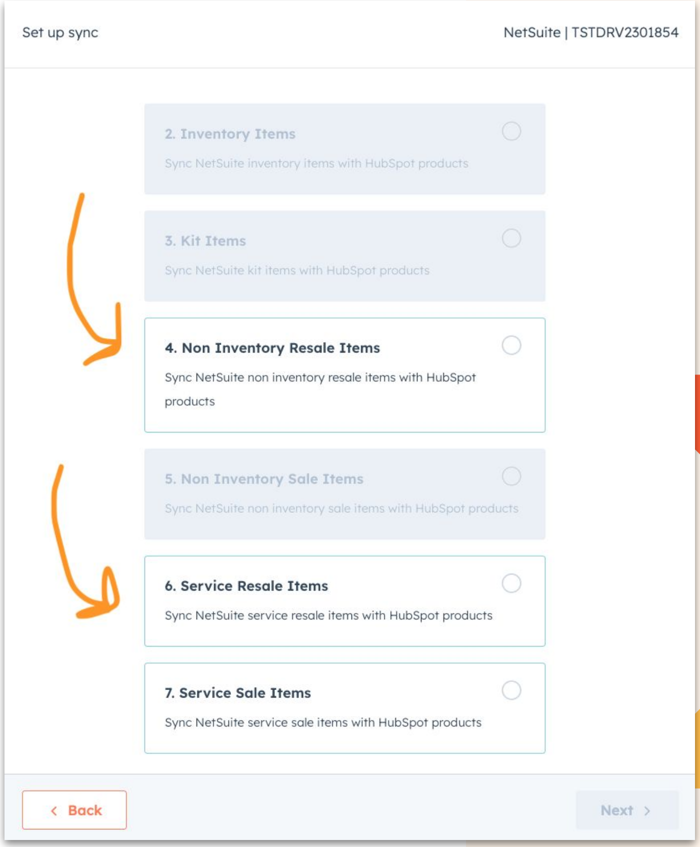
App Marketplace & Integrations

Additional Product Sync: Resale Items for NetSuite

You now have the ability to sync non-inventory resale items and service resale items from NetSuite to the HubSpot product library - bidirectionally.

Use Case

Although we already have the ability to sync NetSuite items to the HubSpot's Product Library, this expands support to more types of NetSuite items.



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Private App Access Token Rotation Reminder Emails

As part of ongoing efforts to protect our customer's data, if your HubSpot account has Private Apps, we will now send super admins email reminders to rotate these Private Apps' access tokens every 6 months. We will also send email notifications when Private App access tokens are rotated to make the rotation process easier.

Use Case

Similar to a password, Private app access tokens are used by code to securely make HubSpot API calls. Security best practice recommends changing these tokens regularly. Note - to avoid service interruptions to your private app, work with your developer to ensure the private app code switches to the new access token.

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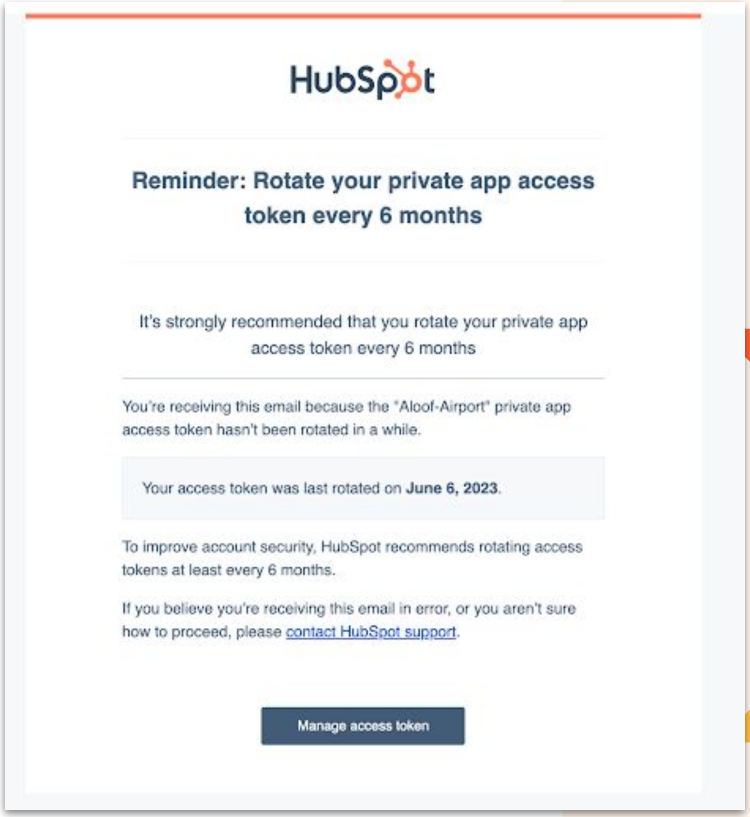

Use HubSpot Chrome Extension in Salesforce

Sales teams can now leverage the HubSpot Chrome extension to work within Salesforce. Users can enroll contacts in sequences, send emails, make calls, and view HubSpot records directly from Salesforce.

Use Case

Many of our Salesforce CRM customers prefer to keep their sales teams working from inside Salesforce but want to leverage HubSpot's Sales Engagement tools to help make their reps more productive. To date, however, it has not been possible for salespeople to stay inside Salesforce completely to execute their sales workflow. Now, sales teams can leverage HubSpot's chrome extension to execute sales activity without ever leaving Salesforce.

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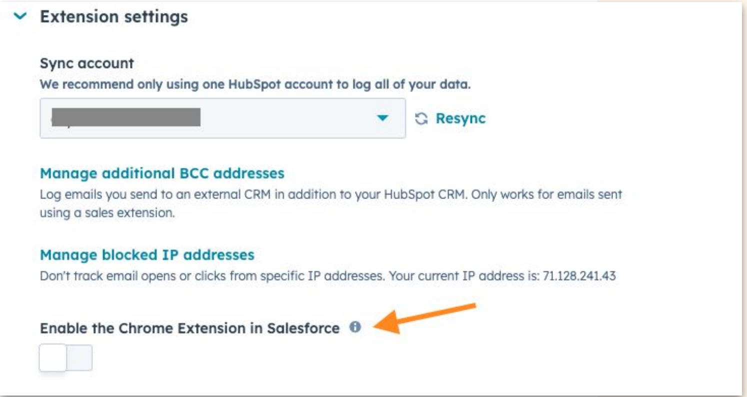
Launch region: Global



Thank you