

# Partner Product Updates

March 2024 (February 2024 Updates)

# Import Offline Event Data to HubSpot Marketing Events

You can now import all your marketing events data into HubSpot for offline (in-person) events. This will allow you to bring all your marketing events data into HubSpot - selecting from a range of integration for your online (virtual) events and using our new import flow for offline (in-person) events.

## Use Case

Marketing events object in HubSpot can be used for offline (in-person) Marketing events activities, with our new imports flow. This means that customers can now bring ALL their Marketing events data into HubSpot, and use the power of HubSpot Marketing events to manage and automate their event activities.

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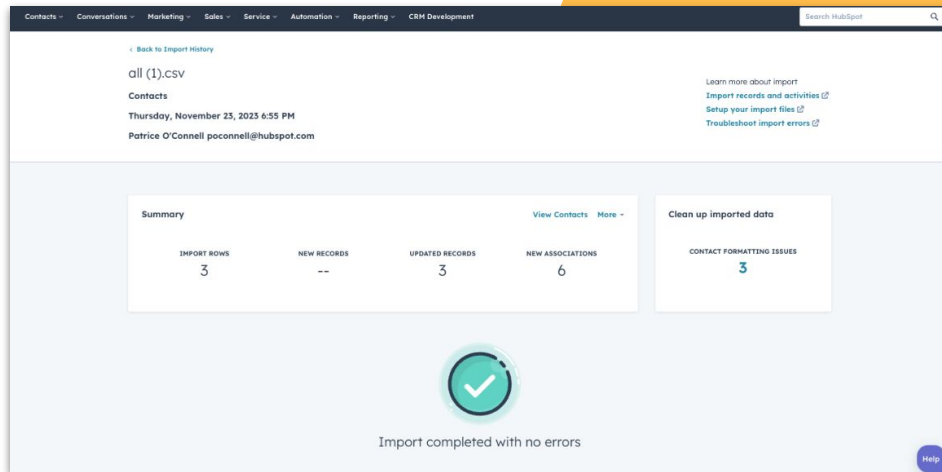
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Launch region: Global



The screenshot shows the HubSpot Marketing Events import completion interface. At the top, there's a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, Reporting, and CRM Development. Below this, the page title is "all (1).csv" and "Contacts". The date and time of the import are "Thursday, November 23, 2023 6:55 PM" and the user is "Patrice O'Connell poconnell@hubspot.com". On the right, there are links for "Learn more about import", "Import records and activities", "Setup your import files", and "Troubleshoot import errors". The main content area features a "Summary" section with a table of import statistics:

IMPORT ROWS	NEW RECORDS	UPDATED RECORDS	NEW ASSOCIATIONS
3	--	3	6

Below the table, there's a "Clean up imported data" section with a "CONTACT FORMATTING ISSUES" count of 5. A large green checkmark icon is centered on the screen, and the text "Import completed with no errors" is displayed below it. A "Help" button is visible in the bottom right corner.

# Business Unit Updates to Navigation, Record Creation, and Opt-out Imports

'Business Units' is now selected from the navigation, which will allow that context to be kept as users navigate across tools and applications that support business units.

## Use Case

Customers can select the business unit in which they want to operate, at the account level, within the navigation bar, instead of being selected within each individual action or feature. As part of this change CRM records will be automatically tagged by the selected business units during creation as well as opt-out contacts during an import.

[Learn More](#)

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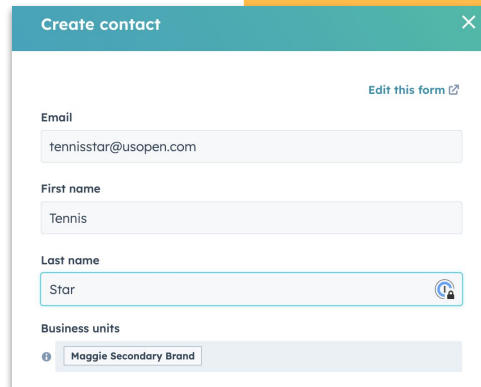
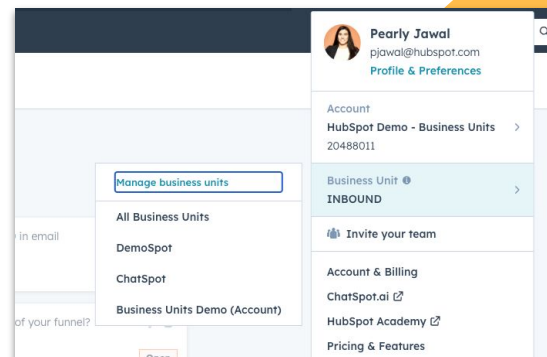
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A screenshot of the 'Create contact' form in HubSpot. The form has a teal header with the title 'Create contact' and a close button. Below the header, there is a link to 'Edit this form'. The form contains several input fields: 'Email' with the value 'tennisstar@usopen.com', 'First name' with the value 'Tennis', and 'Last name' with the value 'Star'. At the bottom, there is a 'Business units' section with a dropdown menu showing 'Maggie Secondary Brand' as the selected option.



# Marketing Single Send API

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

## Use Case

This API provides customers the flexibility to manage their data anywhere while also incorporating it into their marketing emails.

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# AI Assistant for Google Search Ads

HubSpot users can now use AI Assistant in Ads to generate ad copy from scratch using simple prompts for Google search ads.

## Use Case

You can now use the AI assistant in Ads which will enable you to generate ad copy from simple prompts. You can also rewrite, expand, and shorten generated copy to give you more control over the AI-generated text.

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### Generate headlines for your ad

Describe what your ad is about \*

An ad about a donut shop that is famous for its sprinkles

Choose your headlines. The more variations you choose, the better your ad performance will be.

Sprinkles = perfection! [More like this](#) [Insert](#)

Donut lovers, unite! [More like this](#) [Insert](#)

Sprinkle bliss awaits. [More like this](#) [Insert](#)

< 1 / 1 > [Generate more](#)



## Custom behavioral events (CBEs) are now Custom events (CEs)!

- Previously limited to Marketing Hub, now all enterprise Hubs (Marketing, Sales, CMS, Service, Operations) can create Custom events via API, Custom Javascript, or Import.
  - Codeless event creation via the Event Visualizer will remain Marketing Hub exclusive
- More events for more flexible event creation
  - 500 unique event definitions per account
  - 30 million event completions per month
- New event definition API to create, read, update, and delete Custom event definitions without needing to log into HubSpot (public beta)
- Activity living in spreadsheets? Connect offline data with spreadsheet event import

### Use Case

Custom objects allow you to capture processes and relationships unique to you, where Custom events allow you to track any activity or moment critical to your business. Like objects, these events also contain properties, allowing you to track rich metadata about the event that occurred and action that data across the entire platform.

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# 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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# LinkedIn Audience Targeting for Organic Social

With LinkedIn targeting, marketers can tailor content to specific audiences. Posts can be targeted based on your followers' profile data such as organization size, industry, function, seniority, geography, and language preference. Targeted posts are only actively displayed to members who fit within the target criteria. If that post is shared or reposted, then members outside of the target will be able to see the post.

## Use Case

Content is everywhere and businesses with a social media presence must ensure their social content is personalized, targeted and effective.

By applying audience targeting to posts you publish, you can deliver high quality content to any desired segment of your followers. This helps businesses stay relevant in today's noisy and information-overloaded social spaces.

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# Opt-out all email per business unit from contact's record

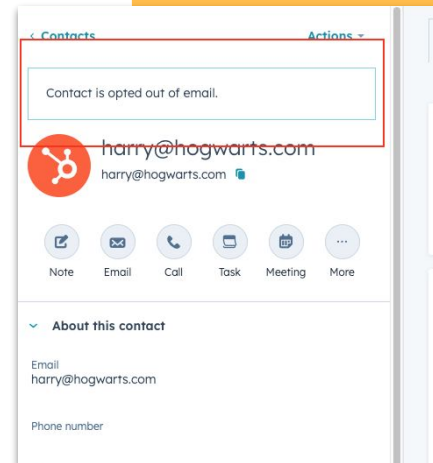
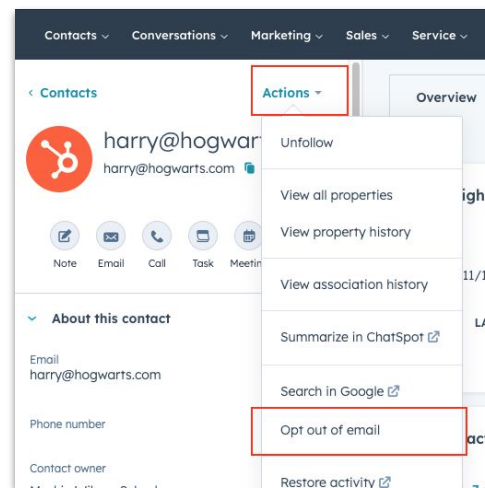
Previously, the "opt out of all" action available in the contact record would only apply the opt out to the Account Business Unit. Now, portal users can opt out a contact from any Business Unit.

## Use Case

Perform an "opt out of all" action for your contact for any Business Unit, not just the Account Business Unit.



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# Enable Double Opt-In for Forms

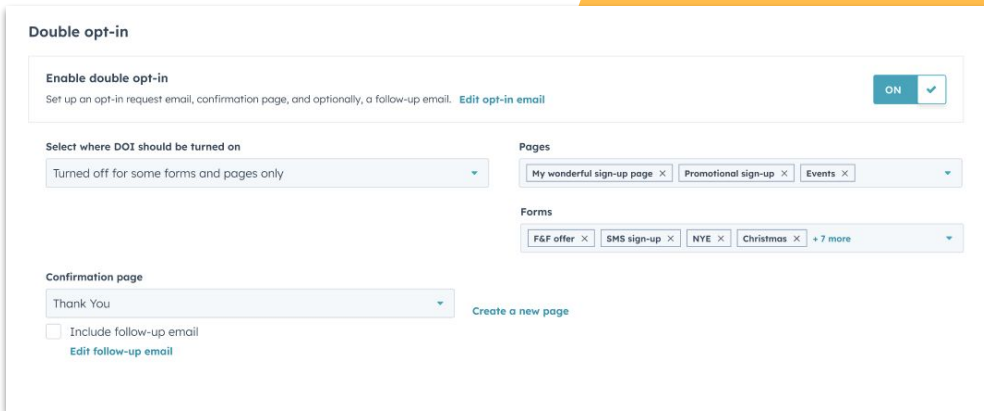
Historically, it was only possible to enable/disable double opt-in for select pages created in HubSpot.

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

More flexibility to apply double opt-in for certain situations, i.e. if it is mandatory for some countries but not others, you can have select forms in which DOI is used vs other forms in which it is not.



The screenshot shows the 'Double opt-in' configuration page in HubSpot. At the top, there is a toggle switch labeled 'ON' with a checkmark, indicating that double opt-in is currently enabled. Below this, the text reads 'Set up an opt-in request email, confirmation page, and optionally, a follow-up email. [Edit opt-in email](#)'. The main configuration area is divided into three sections: 'Select where DOI should be turned on', 'Pages', and 'Forms'. The 'Select where DOI should be turned on' section has a dropdown menu currently set to 'Turned off for some forms and pages only'. The 'Pages' section features a horizontal list of page tags: 'My wonderful sign-up page', 'Promotional sign-up', and 'Events', each with a close button (X) and a dropdown arrow. The 'Forms' section has a horizontal list of form tags: 'F&F offer', 'SMS sign-up', 'NYE', 'Christmas', and '+ 7 more', each with a close button (X) and a dropdown arrow. At the bottom, there is a 'Confirmation page' dropdown menu set to 'Thank You' with a 'Create a new page' link to its right. Below the confirmation page, there is an unchecked checkbox labeled 'Include follow-up email' with an 'Edit follow-up email' link underneath it.

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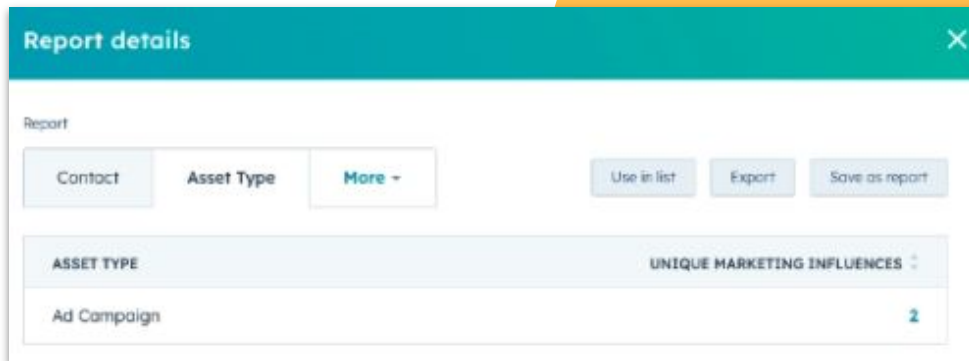
Launch region: Global

## Campaigns metric 'influenced contacts' now includes Ad interactions

The Campaigns metric 'influenced contacts' now includes contacts that interact with ad(s) in associated Ad campaigns.

### Use Case

Up until today, any interaction with an associated Ad campaign was not counted towards the sum of 'influenced contacts'. This discrepancy has now been removed ensuring 'influenced contacts' support every asset type available in the Campaigns app.



The screenshot shows a 'Report details' window with a teal header and a close button. Below the header, there's a 'Report' section with three tabs: 'Contact', 'Asset Type', and 'More'. To the right of these tabs are three buttons: 'Use in list', 'Export', and 'Save as report'. Below the tabs is a table with two columns: 'ASSET TYPE' and 'UNIQUE MARKETING INFLUENCES'. The table has one row with 'Ad Campaign' in the first column and '2' in the second column.

ASSET TYPE	UNIQUE MARKETING INFLUENCES
Ad Campaign	2

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# Google Enhanced Conversions for Leads

Google enhanced conversions is an ad conversion events feature that can improve the accuracy of your conversion measurement and unlock more powerful bidding. It supplements your existing conversion tags by sending hashed first-party conversion data from your website to Google in a privacy-safe way. The feature uses a secure one-way hashing algorithm called SHA256 on your first-party customer data, such as email addresses, before sending to Google.

## Use Case

With enhanced conversions, HubSpot will send offline lifecycle stage change data back to Google server side. This will:

- Recover conversions that otherwise wouldn't have been measured
- Improve bidding optimization through better data
- Be privacy safe with hashing of first-party customer data

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### Create event ✕

Help ad networks optimize the delivery of your ads by letting them know when an event occurs on a contact record, such as when their lifecycle stage changes, or when they make an in-store purchase.

[Learn more about syncing ad conversion events](#)

**Ad network**

 Google Ads ▼

**Ad account**

Coffee Cafe (123-445-6678) ▼

**Event trigger**

Lifecycle stage change  
Now using **Enhanced Conversions** NEW

Form submission

# The 'quick dashboard filters' feature is merging with the new dashboard filters beta

There have been two ongoing dashboard betas to improve the filtering experience:

- "The new dashboard filtering experience," which allows you to pin dashboard filters to any report on a dashboard
- The "quick group filter" beta, which not only automatically generates a dashboard filter for you, but also allows you to create a group of dashboard filters that will work across multiple reports on a dashboard. It also more closely resembles the old dashboard filter interface, which was wildly popular with users.

## Use Case

Users who are ungated to the new dashboard filters beta can now create a group of quick filters to pin across multiple dashboards.

[Learn More](#)

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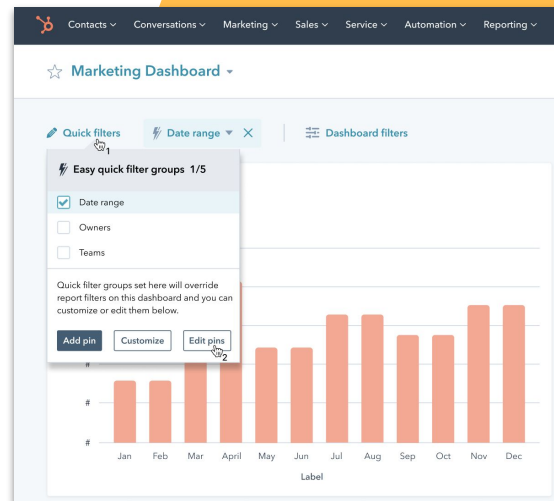
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# Domain Authentication Alert on the Marketing Email Manage Page

To ensure your marketing emails sent via HubSpot comply with the authentication standards and sending policies enforced by major email inbox providers (e.g., Gmail and Yahoo Mail), a new alert is available on the Marketing Email Manage page when a published automated email's *from address* does not have the adequate authentication measures in place, and are at risk of getting blocked.

## 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.

This new alerts on the Marketing Email Manage page will flag when a published email's *from address* does not have the adequate authentication measures in place.

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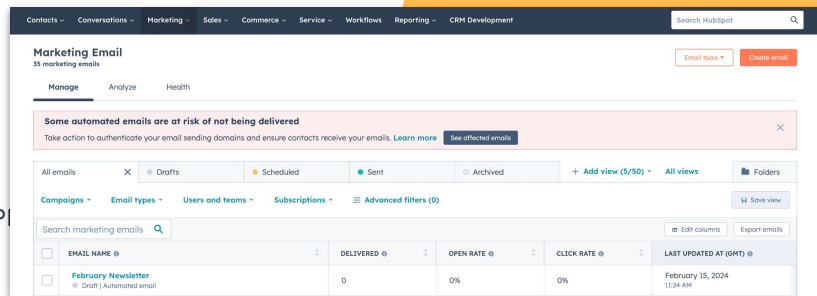
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The screenshot shows the HubSpot Marketing Email Manage page. At the top, there is a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Commerce, Service, Workflows, Reporting, and CRM Development. Below the navigation bar, the page title is "Marketing Email" with a sub-header "33 marketing emails". There are buttons for "Email tasks" and "Create email".

A prominent alert banner is displayed: "Some automated emails are at risk of not being delivered". Below the banner, there is a table of marketing emails. The table has columns for "EMAIL NAME", "DELIVERED", "OPEN RATE", "CLICK RATE", and "LAST UPDATED AT".

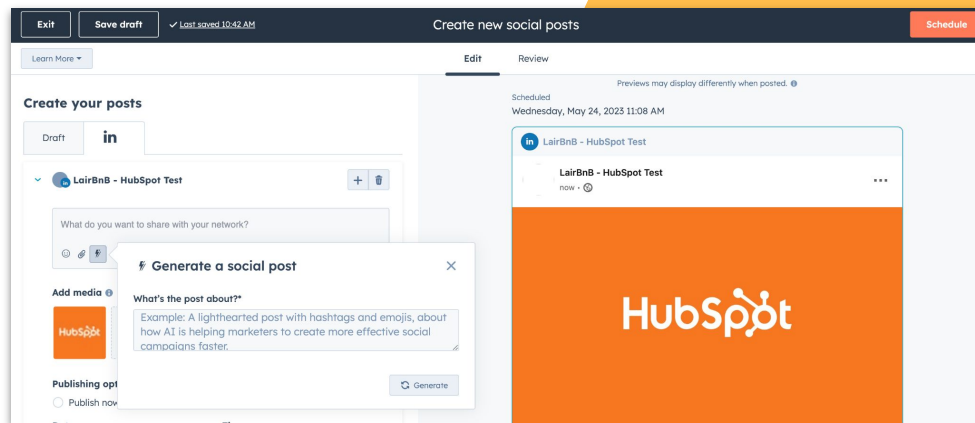
EMAIL NAME	DELIVERED	OPEN RATE	CLICK RATE	LAST UPDATED AT
February Newsletter <small>(Draft) (Automated email)</small>	0	0%	0%	February 15, 2024 11:28 AM

# AI Assistant for Social

We are excited to announce the release of AI assistant for Social on Desktop and Mobile.

## Use Case

Using the AI assistant will enable marketers to write social posts more quickly and with ease. This automates the tedious parts of writing, leaving marketers with more time to shape their own thoughts, opinions, and creativity into their content.



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# Legacy CTA Migration feature

Thanks to the new Legacy CTA Migration feature you can now easily migrate your Legacy CTAs to new CTAs with a simple clicks.

## Use Case

As we've launched the new CTAs tool this year and are planning to sunset the Legacy CTAs by the end of 2024, you need an easy way to migrate from Legacy CTAs to the new CTAs tool. With the new Legacy CTA Migration feature you can now easily create a clone of your Legacy CTA as a new CTA and automatically replace it in all the instances where it's being used, including pages, email, workflows and lists.

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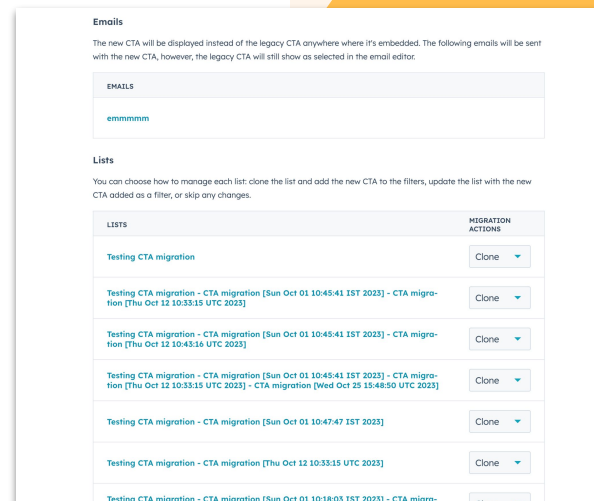
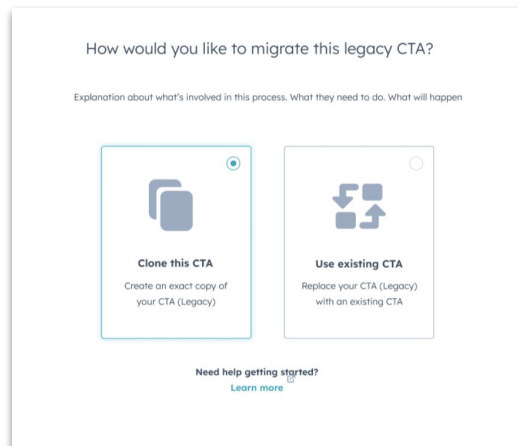
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# Cookie Consent Banner Customization

We've enhanced the cookie consent banner settings with new customization options. Now, you can tailor the banner's colors, positioning, shape, and size to better align with your site's design and user experience.

## Use Case

Responding to popular demand, we've expanded the banner's customization capabilities. This update addresses the need for more flexibility in modifying the banner to complement your website's aesthetics.

[Learn More](#)

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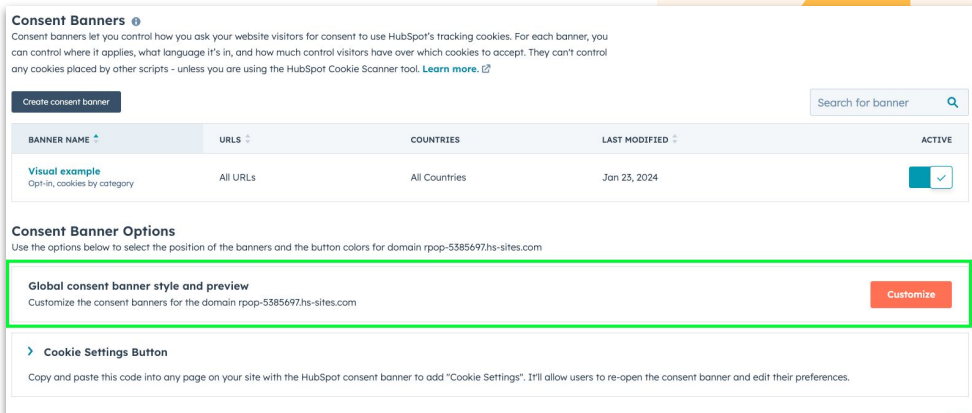
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**Consent Banners** ⓘ

Consent banners let you control how you ask your website visitors for consent to use HubSpot's tracking cookies. For each banner, you can control where it applies, what language it's in, and how much control visitors have over which cookies to accept. They can't control any cookies placed by other scripts - unless you are using the HubSpot Cookie Scanner tool. [Learn more](#). ⓘ

Create consent banner Search for banner 🔍

BANNER NAME ⓘ	URLS ⓘ	COUNTRIES	LAST MODIFIED ⓘ	ACTIVE
Visual example <small>Opt-in, cookies by category</small>	All URLs	All Countries	Jan 23, 2024	<input checked="" type="checkbox"/>

**Consent Banner Options**  
Use the options below to select the position of the banners and the button colors for domain rpop-5385697.hs-sites.com

**Global consent banner style and preview** Customize  
Customize the consent banners for the domain rpop-5385697.hs-sites.com

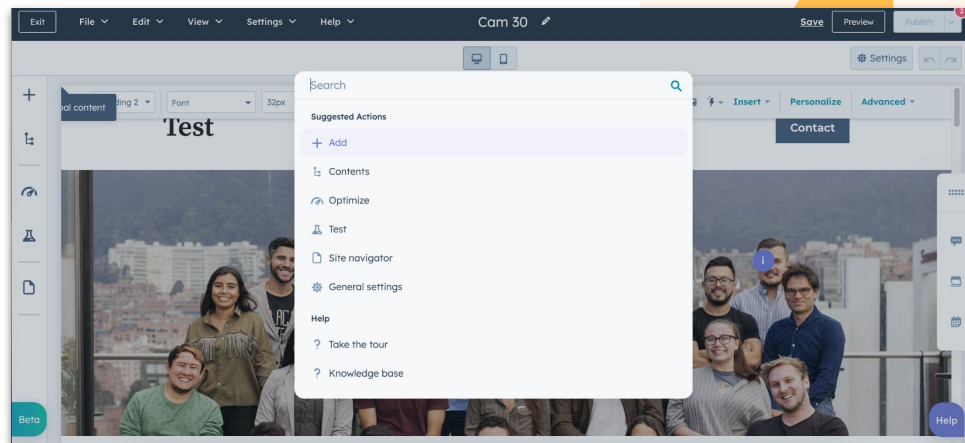
➤ **Cookie Settings Button**  
Copy and paste this code into any page on your site with the HubSpot consent banner to add "Cookie Settings". It'll allow users to re-open the consent banner and edit their preferences.



# Content Editors Keyboard Navigation

We've got some exciting news! As drag-and-drop content editors become more sophisticated, we understand the need for quick access to your most used tools.

That's why we're introducing a new keyboard navigation feature specifically designed for our power users. With this feature, you can navigate through the user interface faster and effortlessly to create content.



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## “Use correctly sized images” rec in website editor “Optimize” side panel

We added a new “Use correctly sized images” recommendation into the “Optimize” side panel that shows inside the website and landing page editors. This recommendation will highlight any images whose actual size is larger than their render size. We added a simple click-to-fix action to resize these images automatically.

### Use Case

We created a new recommendation right inside of the editor “Optimize” side panel to warn users if they are about to publish a page with images that are larger than what’s rendered on the screen.

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[Learn more about alt text](#) 

#### Use correctly sized images

Using large images slows page loading time. Customize maximum image size with width and height, and use HubSpot’s srcset attribute. This will improve image sizing for faster loading times.

**These images are oversized and missing width/height attributes:**

- [Screen%20Shot%202022-04-15%20at%208.53.32%20PM.png](#)  
[Improve image size](#)
- [Screen%20Shot%202022-04-19%20at%2010.01.29%20PM.png](#)  
[Improve image size](#)
- [Screen%20Shot%202022-04-15%20at%208.55.05%20PM.png](#)  
[Improve image size](#)

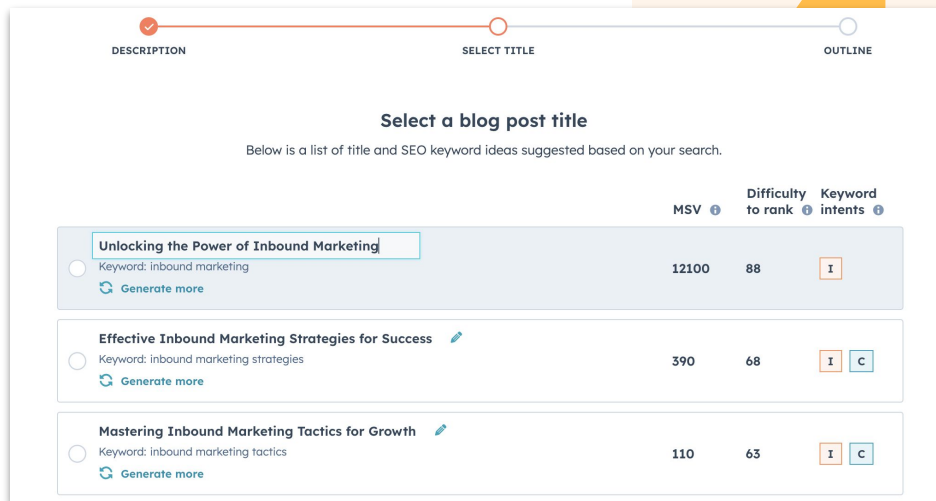
[^ See less](#)

## Add your own titles to AI blog post generator

You can now edit the example titles and keywords shown in the second step of the AI blog post generator. Your edited/updated title will inform the AI outline we recommend for the next step.

### Use Case

The AI blog post generator does a great job of helping users who don't quite know what they want to write about. However, it doesn't support users who know exactly what they want to write about, since you can't put in your own titles and generate posts from those. One of our top feedback requests is from users asking for more control over the generated blog post. So we made all of the titles on step 2 of the wizard fully editable!



The screenshot shows the 'SELECT TITLE' step of the AI blog post generator. It features a progress bar at the top with three stages: 'DESCRIPTION' (checked), 'SELECT TITLE' (current), and 'OUTLINE'. The main heading is 'Select a blog post title', followed by the instruction: 'Below is a list of title and SEO keyword ideas suggested based on your search.' Below this is a table of suggestions:

	MSV <sup>?</sup>	Difficulty to rank <sup>?</sup>	Keyword intents <sup>?</sup>
<input checked="" type="radio"/> <b>Unlocking the Power of Inbound Marketing</b> Keyword: inbound marketing <a href="#">Generate more</a>	12100	88	I
<input type="radio"/> <b>Effective Inbound Marketing Strategies for Success</b> <sup>?</sup> Keyword: inbound marketing strategies <a href="#">Generate more</a>	390	68	I C
<input type="radio"/> <b>Mastering Inbound Marketing Tactics for Growth</b> <sup>?</sup> Keyword: inbound marketing tactics <a href="#">Generate more</a>	110	63	I C

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# AI Assistant: Subject Line Generation

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

## Use Case

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

[Learn More](#)

Free

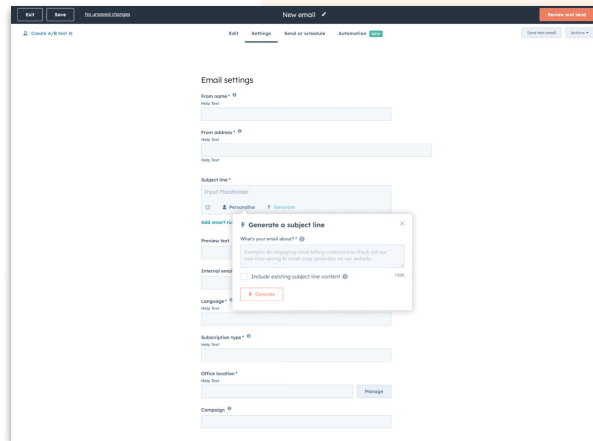
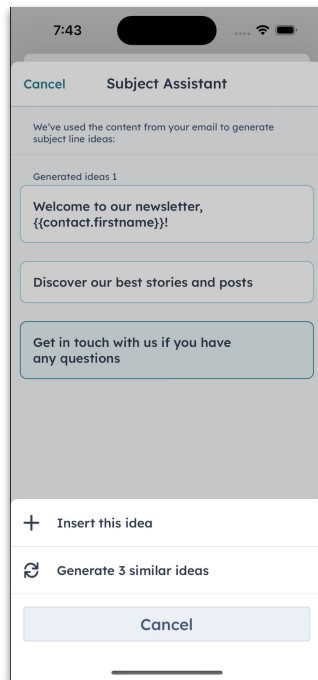
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## Changes to EQ filter and additional support for CONTAINS filter in CRM HubL functions

Currently, when using the query parameter in the [crm\\_objects](#), [crm\\_object](#), and [crm\\_associations](#) HubL functions, the eq (equal) filter available operates less like an equal comparison, or more like a contains comparison. We are updating the eq filter to evaluate that a property is exactly equal to the passed condition, and adding support for contains filters for string properties (this used to only be supported for properties with multiple values).

### Use Case

When using the CRM HubL functions, it is valuable to be able to both check if a property contains a value, and is exactly a certain value.

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*\*available to Marketing Hub Enterprise and CMS Hub Starter+ customers*

 Sales Hub™ +  Service Hub™

# New lead object owner property and improved visibility/actions in the prospecting workspace

Two exciting, highly requested leads features are now live!

1. Improvements to lead record ownership that allow users to use lead owner as a discrete property value separate from the associated contact and company owner
2. Enhanced lead visibility for admins and super admins, as well as bulk action capabilities

## Use Case

With this release, we've given users the ability to use lead owner as a discrete property by disabling 'lead owner inherit' in lead settings, ensuring that the process you build in Sales Hub accurately reflects how your business operates.

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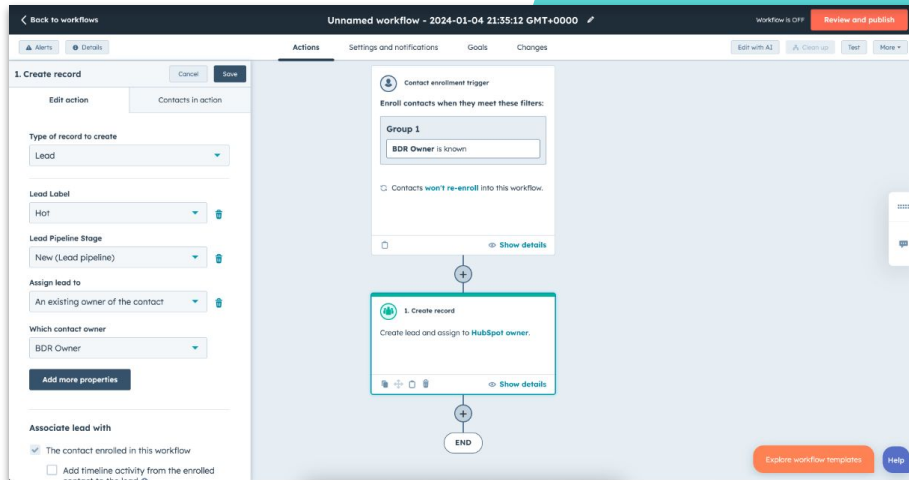
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# Respect Deal Split Percentage in Forecast Rep View

When bulk-selecting deals to include in a forecast submission from the forecast rep view, the deal split amounts will now be used where applicable rather than the total deal amounts. This guarantees that no deal amounts are doubly counted in submissions and reps are only submitting the amount that's attributed to them.

Additionally, the Amount in Company Currency and Weighted Amount in Company Currency properties now reflect the deal split amount when applicable.

## Use Case

Now, these amounts will be consistent across all four default currency properties.

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Forecast category: 5 categories selected -

2 selected Deal amount **\$1,650.00** → Submit Forecast

	DEAL NAME	DEAL STAGE	AMOUNT	AMOUNT IN COMPANY CURREN...
<input checked="" type="checkbox"/>	BambooHR	Qualified to buy (Sales Pipeli...	\$650.00 50% Deal Split applied	€604.50 50% Deal Split applied
<input checked="" type="checkbox"/>	Schaefer, Nader and Parker	Initial meeting (Sales Pipelin...	\$1,000.00	€930.00
<input type="checkbox"/>	Mosciski, Ledner and Gree...	Presentation scheduled (Sale...	\$350.00 25% Deal Split applied	€325.50 25% Deal Split applied

## Calling as a channel in the Help Desk

The Help Desk (public beta) now includes calling as a channel. You can now connect a HubSpot-provided phone number to your Help Desk, directing inbound calls to a group of reps. Inbound calls will simultaneously ring up to 10 available users and create a new ticket in the connected pipeline.

### Use Case

Help Desk is a powerful new feature that consolidates tools that enable customer support agents to resolve issues efficiently. This new feature update enhances its omni-channel capabilities by introducing calling. Benefits include:

[Learn More](#)

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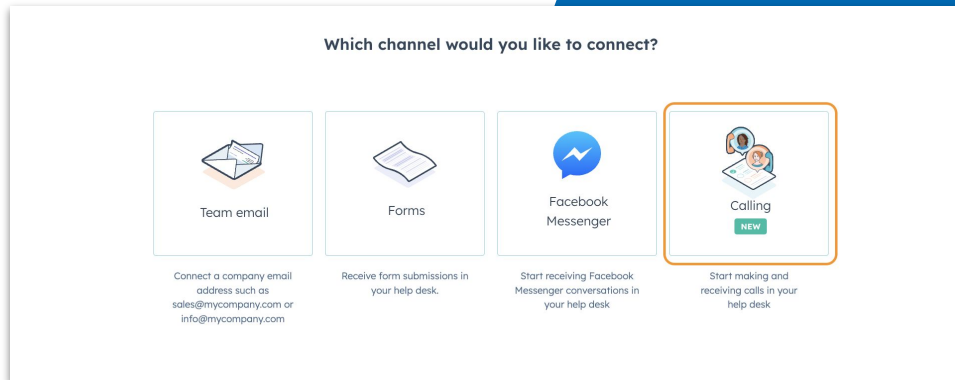
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Which channel would you like to connect?



 Team email	 Forms	 Facebook Messenger	 Calling <b>NEW</b>
Connect a company email address such as sales@mycompany.com or info@mycompany.com	Receive form submissions in your help desk.	Start receiving Facebook Messenger conversations in your help desk	Start making and receiving calls in your help desk

# Password-less Authentication

Password-less Authentication allows members to login without remembering their password. Site visitors opting for password-less authentication simply need to provide their email address that is associated with their membership. The visitor will then receive an email with a login link. That link will expire after fifteen minutes or after use. The link will redirect the user to the private content and authenticate them across the domain.

Free

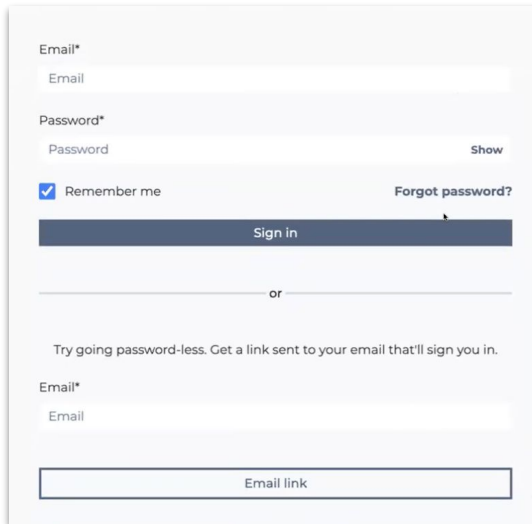
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The screenshot shows a login interface with two sections. The top section is for password-based login, featuring fields for 'Email\*' and 'Password\*', a 'Show' link, a checked 'Remember me' checkbox, and a 'Forgot password?' link. A dark 'Sign in' button is positioned below. The bottom section is for password-less login, featuring an 'Email\*' field and a light 'Email link' button. A horizontal line with 'or' separates the two sections. Text below the line reads: 'Try going password-less. Get a link sent to your email that'll sign you in.'

## Sign in with one-time link

Continue signing into your account. For your security, this link will expire in 15 minutes.

Sign in

Or copy and paste this link into your browser:  
[https://qaportal.rachelwaddell.world/\\_hcms/mem/login/passwordless-auth/landing?data=AyOr4%2FNW54n1%2RmAv1v%2FzoOBG%2FBbk5U%2FkgrOu9503fE%80ZUR1T5jDYV1XA0JHL15u0G7ELCV1VIG5OQ05tWQ6QcK7nrvEG6ZV8fmKCEHq0L1dxPQnG6y2Bm4y7FV00Zv%2BHx9gqckQ6mshVfFmp5Kmqkru9jdlAa3cc=CaNAhASQOE6aP9s5tFBAIUJqUPDXoD9pv6Ea11BPGT%2FJDdCaWlble693xtGslJ9y0yWSSL7ABBE4G8ZKK%2F3Czuxh3rcx0MdyZVeJAUMxDPv4Dck&version=1](https://qaportal.rachelwaddell.world/_hcms/mem/login/passwordless-auth/landing?data=AyOr4%2FNW54n1%2RmAv1v%2FzoOBG%2FBbk5U%2FkgrOu9503fE%80ZUR1T5jDYV1XA0JHL15u0G7ELCV1VIG5OQ05tWQ6QcK7nrvEG6ZV8fmKCEHq0L1dxPQnG6y2Bm4y7FV00Zv%2BHx9gqckQ6mshVfFmp5Kmqkru9jdlAa3cc=CaNAhASQOE6aP9s5tFBAIUJqUPDXoD9pv6Ea11BPGT%2FJDdCaWlble693xtGslJ9y0yWSSL7ABBE4G8ZKK%2F3Czuxh3rcx0MdyZVeJAUMxDPv4Dck&version=1)

If you did not make this request, you can safely ignore this email.  
If you have questions, please [contact the site's administrator](#)

# View Direct Reply on Incoming WhatsApp messages in Conversations Inbox

Agents can now see a direct reply to a specific message on all incoming WhatsApp messages, including media and attachments (except for replies on Polls).

## Use Case

Customers using the Conversations inbox to view inbound WhatsApp messages are currently unable to see when a response is related to an existing message. While end users might be able to reply to a specific message on WhatsApp, customers using our inbox cannot view those threaded WhatsApp replies which removes a lot of context and limits their ability to engage in conversations with their customers effectively.

Free

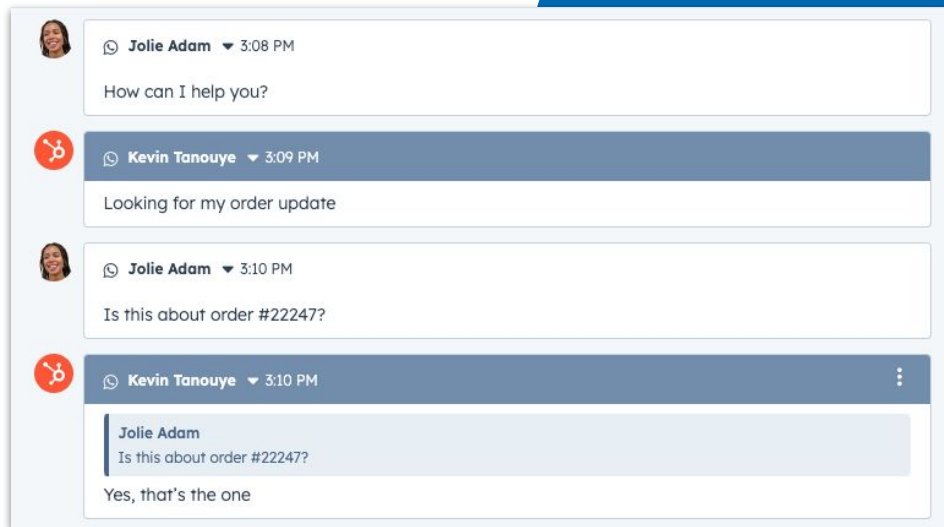
Starter

Pro

Ent

Live

Launch region: Global



The screenshot displays a WhatsApp conversation inbox with four messages. The first message is from Jolie Adam at 3:08 PM: "How can I help you?". The second message is from Kevin Tanouye at 3:09 PM: "Looking for my order update". The third message is from Jolie Adam at 3:10 PM: "Is this about order #22247?". The fourth message is from Kevin Tanouye at 3:10 PM: "Yes, that's the one". A direct reply from Jolie Adam is shown below the fourth message, containing the text "Is this about order #22247?".

# Bulk Editing Tickets in Help Desk

Customer support leaders and reps now have more efficient ways to manage tickets from the list view in help desk. Instead of editing each ticket individually, they can select a group of tickets and update properties in bulk.

## Use Case

Scaling support teams can experience spikes in ticket volume because of seasonality, launches, campaigns, and product issues. Bulk editing tickets allows support teams to make simultaneous changes to multiple tickets, improving rep efficiency and reducing the time needed for ticket management tasks.

Free

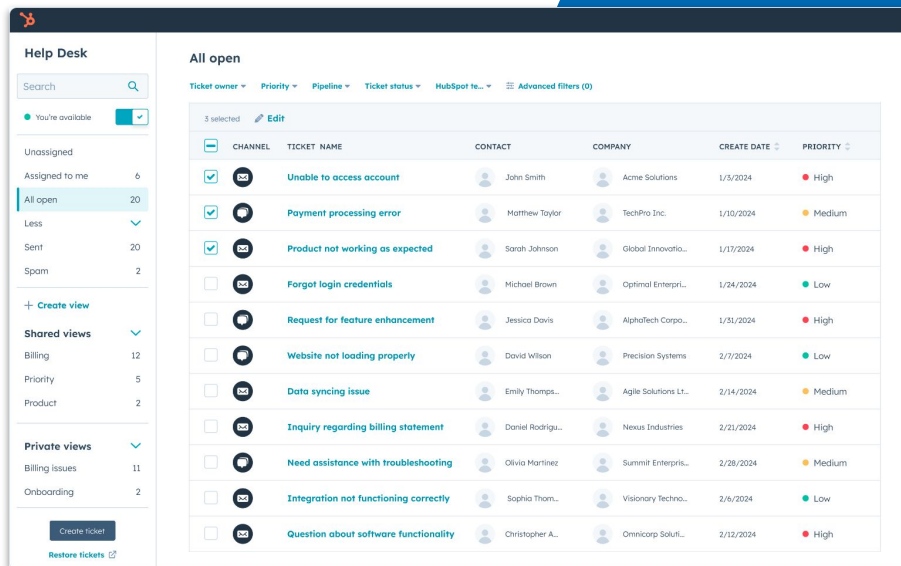
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Live

Launch region: Global



The screenshot displays the Service Hub Help Desk interface. On the left, a sidebar shows navigation options: 'Unassigned', 'Assigned to me' (6), 'All open' (20), 'Less', 'Sent' (20), and 'Spam' (2). Below this are sections for '+ Create view', 'Shared views' (Billing: 12, Priority: 5, Product: 2), and 'Private views' (Billing issues: 11, Onboarding: 2). At the bottom of the sidebar are buttons for 'Create ticket' and 'Restore tickets'.

The main area is titled 'All open' and features a table of tickets. The table has columns for 'CHANNEL', 'TICKET NAME', 'CONTACT', 'COMPANY', 'CREATE DATE', and 'PRIORITY'. Five tickets are selected, indicated by checkmarks in the first column. The tickets are:

CHANNEL	TICKET NAME	CONTACT	COMPANY	CREATE DATE	PRIORITY
📧	Unable to access account	John Smith	Acme Solutions	1/3/2024	High
📧	Payment processing error	Matthew Taylor	TechPro Inc.	1/10/2024	Medium
📧	Product not working as expected	Sarah Johnson	Global Innovatio...	1/17/2024	High
📧	Forgot login credentials	Michael Brown	Optimal Enterpri...	1/24/2024	Low
📧	Request for feature enhancement	Jessica Davis	AlphaTech Corpo...	1/31/2024	High
📧	Website not loading properly	David Wilson	Precision Systems	2/7/2024	Low
📧	Data syncing issue	Emily Thomps...	Agile Solutions L...	2/14/2024	Medium
📧	Inquiry regarding billing statement	Daniel Rodrigu...	Nexus Industries	2/21/2024	High
📧	Need assistance with troubleshooting	Olivia Martinez	Summit Enterpris...	2/28/2024	Medium
📧	Integration not functioning correctly	Sophia Thom...	Visionary Techno...	2/6/2024	Low
📧	Question about software functionality	Christopher A...	Omnicorp Soluti...	2/12/2024	High



## AI Forecasting

HubSpot's new AI-powered forecast uses in-month sales data to project future sales, getting your team closer to a spot-on forecast.

**NOTE:** Customers must have at least two months of deal data and meet an average AI accuracy threshold of 65% over two months to access the tool. If your account doesn't meet that threshold, a good way to get there is by making sure your sales team is routinely inputting and updating deals in HubSpot.

### Use Case

To help customers calibrate an accurate forecast, we're using predictive AI technology to project future sales based on existing closed-won deal data. With a "most likely," "upper," and "lower" range, AI projection is yet another perspective customers can use to calibrate an accurate forecast.

[Learn More](#)

Free

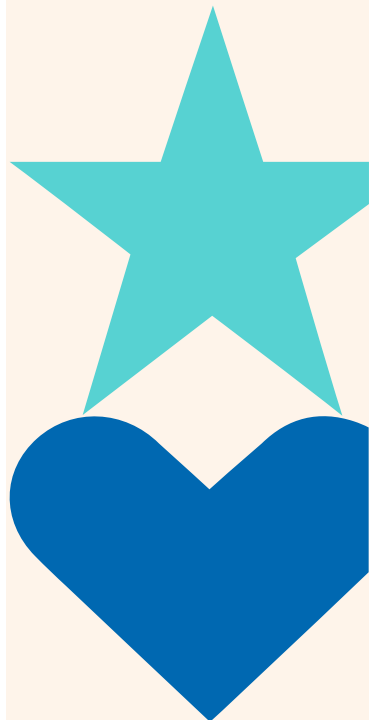
Starter

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Public Beta

Launch region: Global





## 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](#)

Free

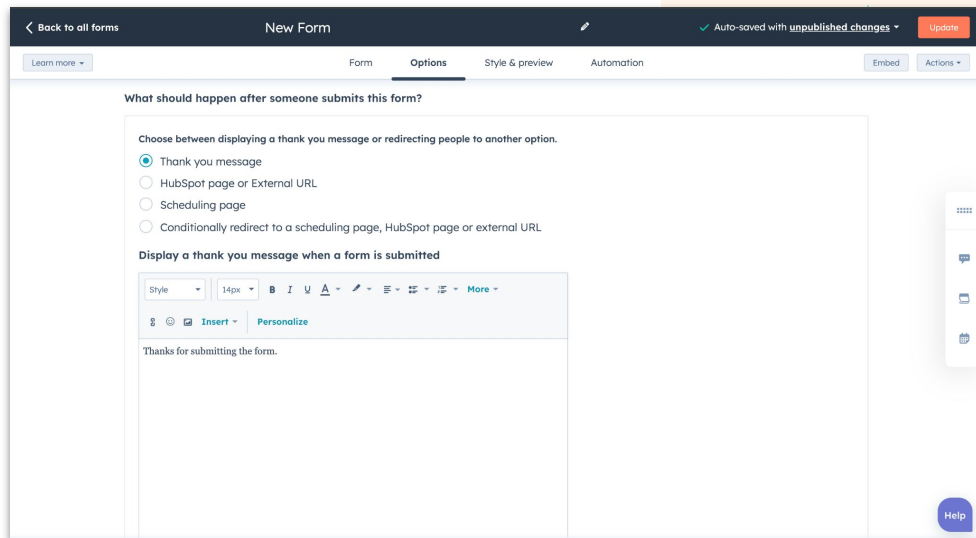
Starter

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Live

Launch region: Global





## Embed Coaching Resources in Playbooks

Playbooks can now include resources such as recorded calls, call clips, and playlists – allowing sales managers to create powerful coaching playbooks for their teams.

### Use Case

Playbooks are a powerful coaching tool that sales managers leverage to upskill their sales reps. By adding the ability to insert resources like call recordings and coaching playlists, sales managers can now provide their teams with a selection of calls to navigate different call scenarios without disrupting their workflow.

[Learn More](#)

Free

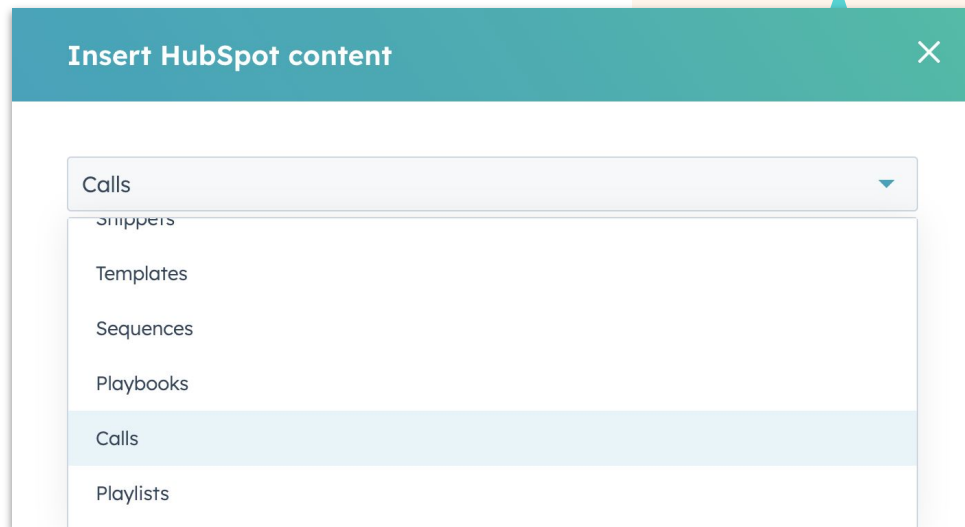
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Launch region: Global







# User Working Hours for Inbox and Help Desk

With user working hours, Admins and individual users can set weekly working hours based on the user's time zone, which might vary from the account's or their team's time zones. When a user is outside of their working hours, their availability will be changed to Away and they won't be eligible for automatic assignment in inboxes or Help desk.

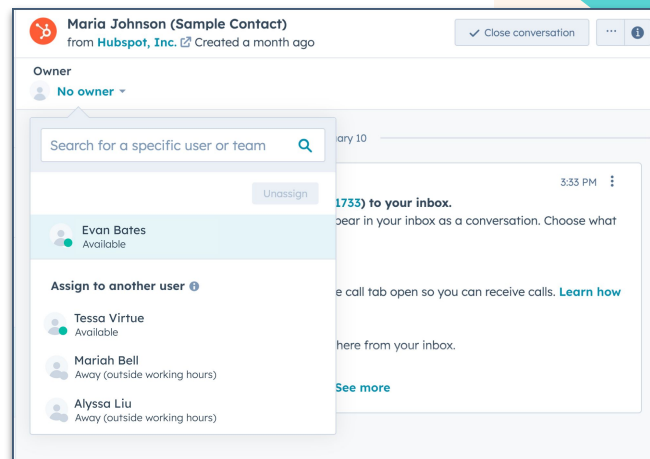
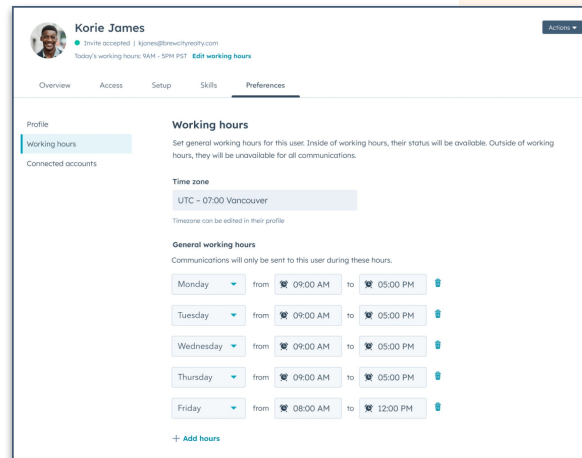
Users can manually change their availability status on the user record page, inbox, or Help desk and the new status will be mirrored across all of the experiences.

## Use Case

With user working hours, users and Admins can drive better customer outcomes and improve employee retention.



Launch region: Global





## Change language for calling consent messages

Initially available only in English, we've extended the functionality to change the language for calling consent messages to accommodate our growing international user base. Now you can effortlessly change the language of the consent message, which gives you more control over your calling experience.

### Use Case

Ensuring a diverse and inclusive user experience is important in today's globalized world. By enabling users to customize the language of their calling consent message, we empower customers from various linguistic backgrounds to engage seamlessly with their calls. This enhancement promotes accessibility and user comfort with your company brand, fostering a more inclusive setting for all calling users across different countries.

Free

Starter

Pro

Ent

Live

Launch region: Global

**Name**  
This name will display next to your phone number in HubSpot.  
Sales Rep 2

**Recording Consent Language**  
Select a language for the recording consent message.  
Spanish - Spain  
Portuguese - Portugal  
Portuguese - Brazil  
Spanish - Spain  
Spanish - Mexico  
Spanish - United States  
Swedish - Sweden

**Recording Consent Voice**  
Select a voice tone for the recording consent message.  
Conchita

Save Cancel



# Panel component to streamline multi-step processes for UI Extensions

This feature is a part of the public beta for [UI extensions with CRM development tools](#). Make sure you are eligible and enrolled into this beta (as a super admin).

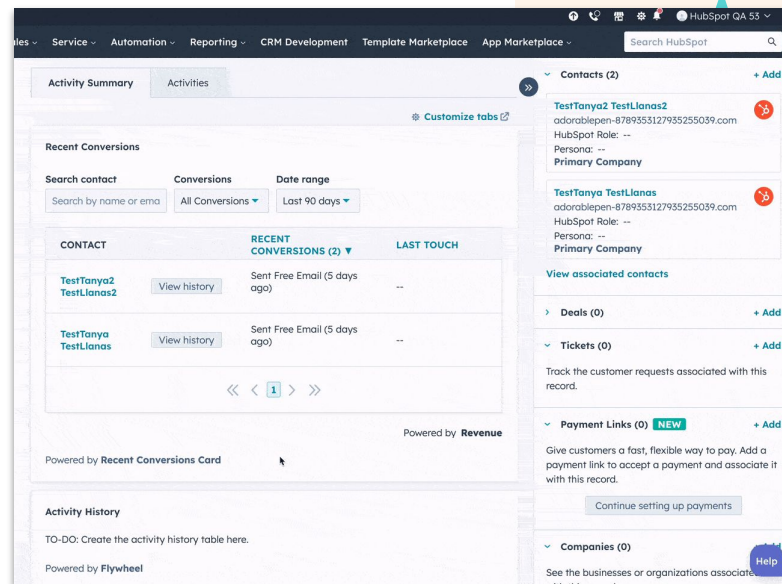
A [Panel](#) is a component that will slide open over the main page, giving developers more space to present detailed information. It can abstract information, perform data-related actions, avoid crowding the main page, and much more. See examples

## Use Case

For building flows with multiple steps, Panels unlock a more user-friendly experience. Examples include: creating or updating data, adding forms, displaying additional information.



Launch region: Global





## UI extensions: custom logger to debug card failures

When an extension fails to load or function during its usage in production by end users, often developers are left with sub-optimal information to debug what went wrong in customer's account. Custom logger allows them to send customized log messages to our platform, that can be visible in private app extension logs or can be accessed via log tracing system.

### Use Case

Using `logger` methods, you can send custom log messages to HubSpot for more in-depth troubleshooting of deployed extensions. Custom log messages will appear in the [app's logs in HubSpot](#), searchable by trace ID.

Free

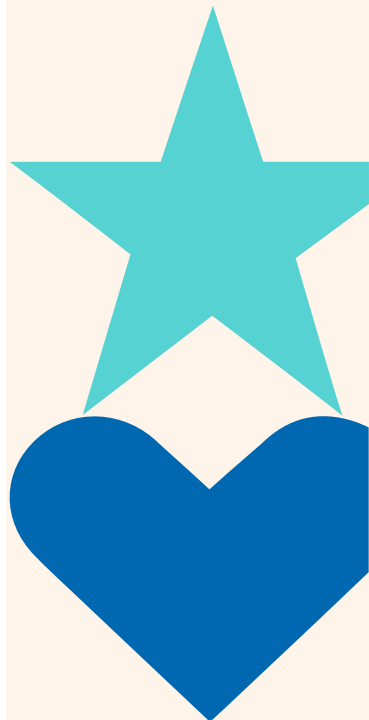
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Public Beta

Launch region: Global

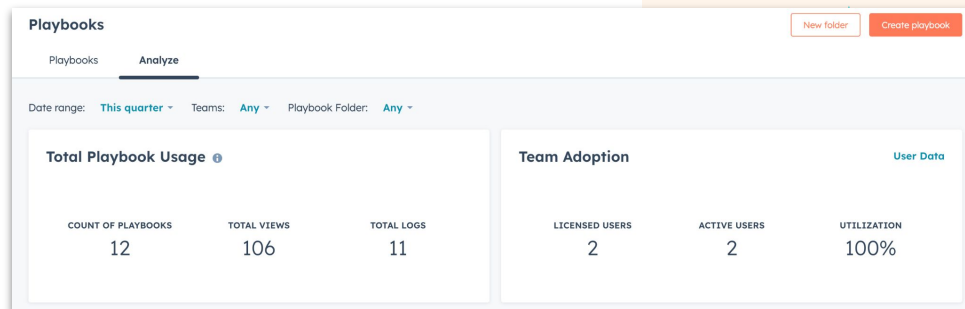


## Report on and analyze Playbook use

We are adding the ability to report on playbook usage. This means users can now see how effective their playbooks are at moving important sales metrics over time.

### Use Case

Sales managers want to understand how their playbooks are being used and how effective they are. The new usage metrics will help them gain a better understanding of their playbooks, the people using them, and how well they are working.



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Launch region: Global



## Implied opens for Sales and Service emails

If a sent email receives a click or reply, it implies the email was opened.

### Use Case

Some email clients have configurations that prevent [HubSpot's open tracking pixel](#) from loading. If a recipient in this situation opens your email, there's no way for HubSpot to know. However, if the recipient clicks a link in the email or replies to it, then we can infer they opened the email.

[Learn More](#)

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Public Beta

Launch region: Global

> **Email - this is confusing** from Hannah Roberts to Test Contact

● Opens: 0 Clicks: 1

**click me please**

*Hannah Roberts*

Product Manager, **HubSpot**



## "Close Date" Automation for Deals and Tickets

When a user moves a deal or ticket record to a closed pipeline stage, the record's "close date" is automatically set to today's date. This helps save users time from having to manually set the date. Admins now have the option to disable this "close date" automation feature at a per-pipeline level. The automation will continue to be defaulted "on" across all pipelines, but if there's a deal or ticket pipeline where this automation would not be useful, you have the flexibility to disable it for that pipeline.

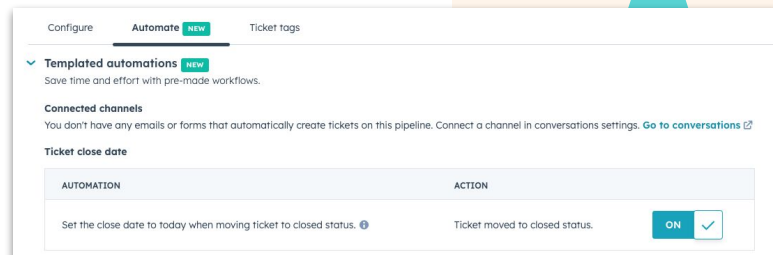
We've also optimized this automation feature for more consistency across the CRM.

### Use Case

This automation was designed to help save users from an additional step, so they can focus on more important tasks. However, it's important to offer more flexibility so admins can turn off this feature where it might not make sense (i.e. if your pipeline has many closed stages, you might not want the "close date" automatically updated).



Launch region: Global





**Operations Hub™**



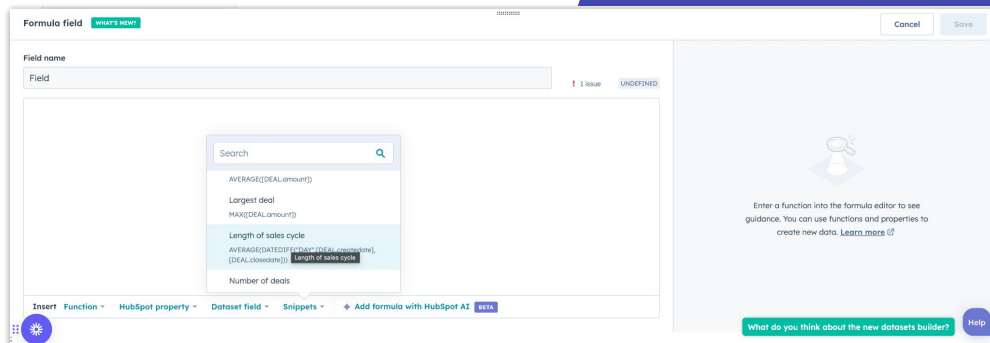


# Formula Snippets in Datasets

Snippets allow users to explore common formula use cases through pre-formulated options, without having to leave the dataset building experience.

## Use Case

It can be intimidating getting started with building formulas in datasets and starting from pre-built examples can meaningfully reduce the burden of getting started building measures and dimensions for reporting.



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Launch region: Global

# Required Field Mappings in Data Sync

We will surface required fields within a data sync setup's field mappings table. In addition to surfacing, we will also then enforce these properties to be mapped.

## Use Case

In order for certain CRM records to be created in HubSpot, some properties are mandatory. For our many [data sync apps](#), this is no different. Here are some more examples of properties that are required, for various apps :

- a new deal record in HubSpot cannot be created unless it has a *deal name*, a *pipeline* and a *stage* specified
- a new contact record into Zoho CRM has the *last name* as a mandatory property, among many other properties that an admin could mark as required
- a new product in Xero needs a *code/SKU* to be populated

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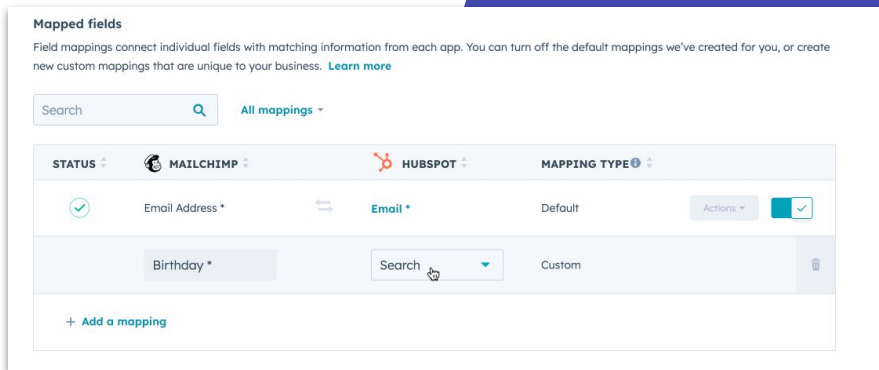
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Launch region: Global

*\*Operations Hub Starter is required to set up custom field mappings*



**Mapped fields**  
Field mappings connect individual fields with matching information from each app. You can turn off the default mappings we've created for you, or create new custom mappings that are unique to your business. [Learn more](#)

Search  All mappings ▾

STATUS	MAILCHIMP	HUBSPOT	MAPPING TYPE	ACTIONS
✓	Email Address *	Email *	Default	Actions ▾ <input checked="" type="checkbox"/>
	Birthday *	<input type="text" value="Search"/> ▾	Custom	<input type="checkbox"/>

[+ Add a mapping](#)

# Workflow Enrollment Diagnosis

You can now efficiently troubleshoot workflow enrollments directly in-app! This functionality will empower users to independently investigate and resolve workflow enrollment questions.

The tool provides users with:

- Comprehensive logs detailing the enrollment status of each record.
- A clear indication of successful enrollments
- Reasons a workflow wouldn't (or did not) enroll

## Use Case

This solution provides customers with enrollment information directly in the workflow tool and will empower you to quickly and efficiently resolve workflow enrollment discrepancies!

Free

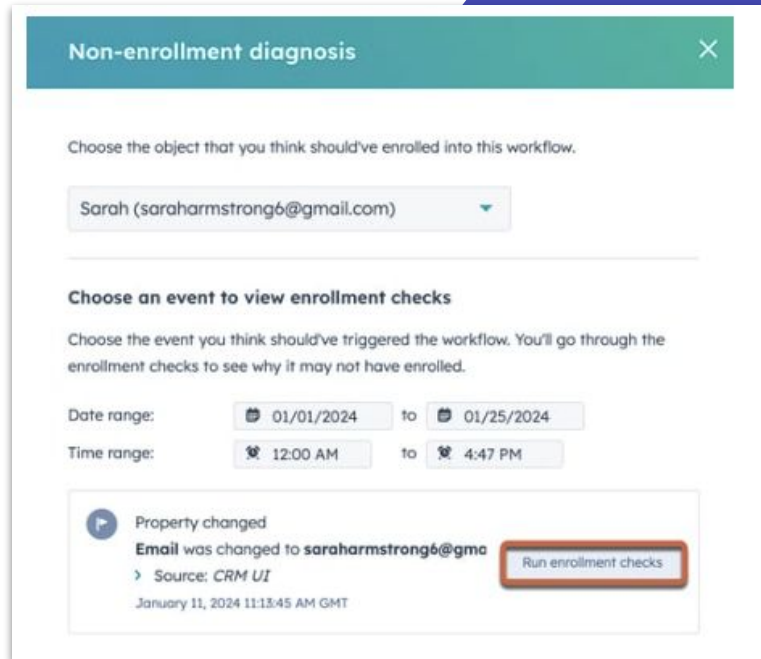
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Live

Launch region: Global



The screenshot shows a user interface for "Non-enrollment diagnosis". At the top, there is a teal header with the title and a close button. Below the header, the user is prompted to "Choose the object that you think should've enrolled into this workflow." A dropdown menu shows "Sarah (saraharmstrong6@gmail.com)".

Next, the user is prompted to "Choose an event to view enrollment checks". Below this, there are date and time range selectors. The date range is set from "01/01/2024" to "01/25/2024", and the time range is from "12:00 AM" to "4:47 PM".

The main content area shows a log entry for "Property changed" with the following details:

- Email** was changed to saraharmstrong6@gmail.com
- Source: CRM UI
- January 11, 2024 11:13:45 AM GMT

A button labeled "Run enrollment checks" is highlighted with a red border.

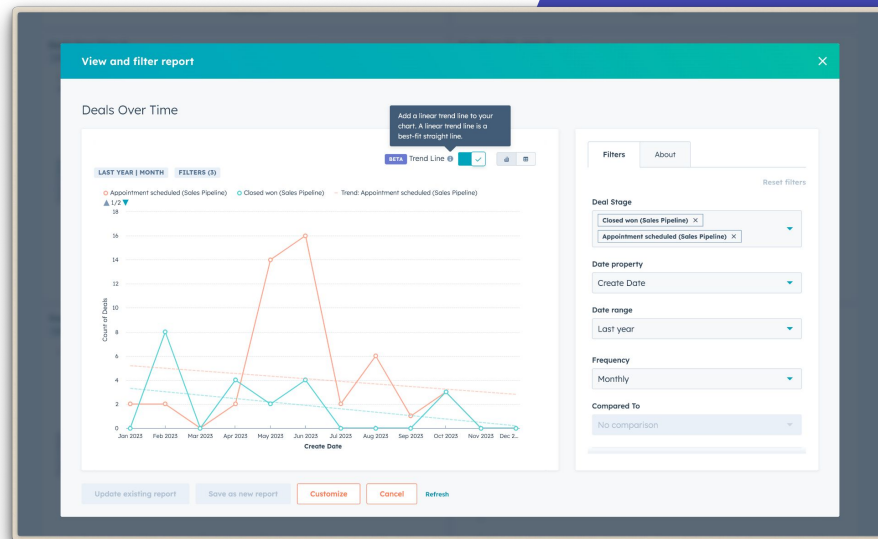
## Trend Lines in the Single Report Viewer

Trend lines are a new visual option to enhance your reports. You can now add multiple types of trend lines in the single report viewer.

### Use Case

Understanding patterns, trends, and changes over time in your data is critical. Trend lines offer a clear and concise way to visualize data trends across a continuum.

In a glance, trend lines not only provide insights into past and present performance but also open a window into potential future outcomes, making them an essential tool in data analysis and decision-making processes.



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Public Beta

Launch region: Global



**Commerce Hub™**



## Payment Schedules on Quotes

Commerce Hub users can now have Invoices automatically created for the payment schedules on their Quotes.

### Use Case

For companies selling project-based work, it's common to ask customers to make an initial payment towards the promised work and collect remaining payments later at a specific date or milestone.

These initial payments could cover the initial costs of providing the work (e.g. 50% down for a website build to secure the dev resources) or indicate the buyer is serious about their contract (e.g. a 1k non-refundable deposit). The remaining installments are collected as needed based on the contract. Payment schedules enable companies to de-risk their business and ensure more stable cashflow for project based work.

Free

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Pro

Ent

Live

**Payment Schedule**  
Break up the total into installments and track collections on the deal.

ON

Remaining amount to assign: \$0.00

INSTALLMENT NAME ID	AMOUNT	DUE DATE	ACTIONS
Deposit	\$25,000.00	Upon receipt	
Available to be paid on this quote			
Remaining Balance	\$25,000.00	Specific date <input type="text" value="01/31/2024"/>	

If you accept payments on this quote, invoices will be automatically created for each installment after the customer's first payment.

[+ Add another installment](#)



## EU Hublet Rollout

We are thrilled to share the exciting news that HubSpot's new Stripe payment processing feature (currently in beta) now offers multi-currency functionality to our valued international customers on EU Hublet. We can't wait for you to try it out and provide us with your valuable feedback, as we strive to continuously enhance our product to meet the unique needs of your business.

### Use Case

All HubSpot customers who use EU as a data center location will be able to connect their Stripe accounts and use Commerce Hub.

*\*Please note that in addition to other terms that apply to your use of Stripe payment processing, customers on the EU Hublet are also subject to HubSpot's Regional Data Hosting Policy. When using Stripe payment processing, data for customers on EU Hublet may be routed through Stripe's EU data center. This means when you use Stripe payment processing from the EU Hublet, your data is routed through Stripe and may be subject to HubSpot's Regional Data Hosting exclusions.*

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# Multi-currency: Global Currency Expansion, Stripe Payment Processing

15 additional currencies are being added to Stripe Payment Processing (beta)

AUD, MXN, NZD, CHF, SGD, SEK, DKK, NOK, HKD, PLN, RON, CZK, BGN, HUF, PHP

Already Available: USD, EUR, CAD, GBP

## Use Case

Customers in 15 new markets globally can now use Stripe payment processing in their local currency allowing buyers to check out in their local as well as other major currencies around the globe.

[Learn More](#)

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# CRM Platform



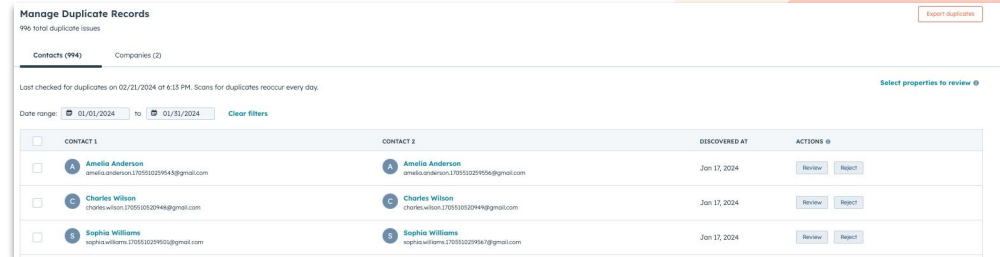
# CRM Platform

## Export Duplicates to CSV and Excel

Introducing the ability to export the duplicate records identified by the duplicate management tool to a CSV and/or Microsoft Excel file.

### Use Case

The new exportability function allows more flexibility and customization for customers to maximize the value from our duplicate identification capabilities and provides the ability for customers to thoroughly investigate duplicates, connect them back to source systems, and route to different downstream workflows.



**Manage Duplicate Records**  
996 total duplicate issues Export duplicates

Contacts (994) Companies (2)

Last checked for duplicates on 02/21/2024 at 6:15 PM. Scans for duplicates recur every day. Select properties to review

Date range: 01/01/2024 to 01/31/2024 Clear filters

<input type="checkbox"/>	CONTACT 1	CONTACT 2	DISCOVERED AT	ACTIONS
<input type="checkbox"/>	<b>A</b> Amelia Anderson amelia.anderson.170552229548@gmail.com	<b>A</b> Amelia Anderson amelia.anderson.170552229556@gmail.com	Jan 17, 2024	<span>Review</span> <span>Reject</span>
<input type="checkbox"/>	<b>C</b> Charles Wilson charlie.wilson.170552229448@gmail.com	<b>C</b> Charles Wilson charlie.wilson.170552229448@gmail.com	Jan 17, 2024	<span>Review</span> <span>Reject</span>
<input type="checkbox"/>	<b>S</b> Sophia Williams sophia.williams.170552229502@gmail.com	<b>S</b> Sophia Williams sophia.williams.170552229510@gmail.com	Jan 17, 2024	<span>Review</span> <span>Reject</span>

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# CRM Platform

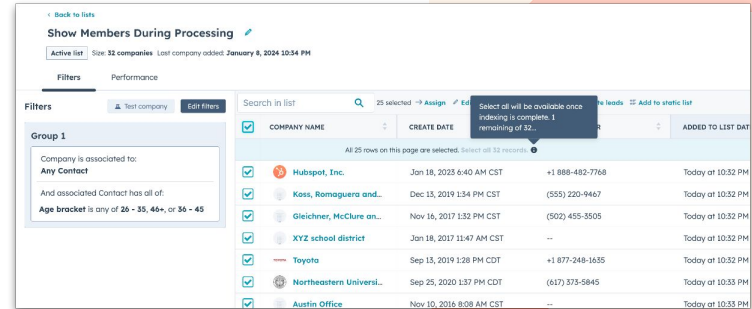
## Improved list creation experience & the ability to sort by the 'Added to List Date' column

Three key updates to the list creation experience:

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

### Use Case

1. When creating a list, it can be helpful to analyze a few records to ensure they match your criteria expectations.
2. Now, 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. 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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Live

Launch region: Global

## CRM Platform

# Additional Mathematical Functions for the Formula Editor

We have expanded our advanced formula editor to include new mathematical functions:

- Absolute value (abs)
- Power (power)
- Square root (sqrt)

### Use Case

Data admins can use these functions to power more sophisticated calculated properties in HubSpot. It no longer requires maintaining a separate system.

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Launch region: Global

**Create a new property**

BASIC INFO      SENSITIVE DATA      FIELD TYPE

**New functions**

[Learn More](#) about calculated properties and what you can build with them.

What are calculated properties? [?](#)      Formula editor

Output type  
Number

Number format  
Formatted number

No issues

power({ Demo Prop A }, 3)      NUMBER

Insert -      [Formula guidance](#)

Sample output: 125      [Hide properties](#)      [Test formula](#)

PROPERTY	TYPE	VALUE
Demo Prop A	Number	5

[Back](#)      [Cancel](#)      [Create](#)

# CRM Platform

## New Source Property on all CRM Records

All records now have a new “Record Source” property which describes how the record was originally created.

### Use Case

All records have a new property called “Record Source.” This property can be used across HubSpot in everything from filtering data to building reports.

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The screenshot displays a contact record for Carmy Berzatto, a Chef at thebear.com. The contact's profile includes a circular avatar with the initials 'CB' and a row of action buttons: Note, Email, Call, Task, Meeting, and More. Below this is a section titled 'About this contact' which lists various fields: Email (carmy@thebear.com), Phone number, Contact owner (Maggie Brenner), Last contacted, Lifecycle stage (Lead), and Lead status. At the bottom of this section, the 'Record Source' field is highlighted with an orange circle, and an orange arrow points from the right towards it. A 'Details' button is visible in the bottom right corner of the record view.

# CRM Platform

## Customize Default Deal Name

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

### Use Case

Historically, when a deal was created off of other records, the deal name was often prefilled with the phrase "-New Deal." This default experience was both inflexible and impacted data quality. Now admins can customize the default experience to fit their unique naming standards 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.

[Learn More](#)

Free

Starter

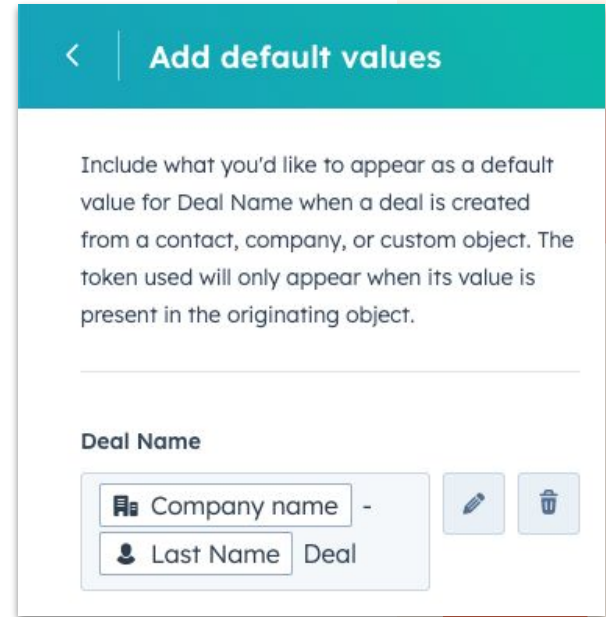
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Launch region: Global

*\*All hubs and tiers can configure the default deal name using a combination of contact and company personalization tokens and/or static text. Custom object personalization tokens are available to Enterprise customers only.*



# CRM Platform

## Configure Specific Association Limits

Admins can now configure the specific limit of associations to a single record. They can do so based on record type e.g. there can be a maximum of 10 contacts associated to a company record or based on a specific label e.g. there can be a maximum of one company with the label “Employer” associated to a contact record. Users can set association limits to many (default) or choose a specific number (e.g. 100).

### Use Case

Over the last few years, we’ve revamped our associations model making it more flexible and introducing new concepts like same object type associations. Throughout these projects, we’ve known that as we add more flexibility, customers also need more control and customization over their associations. And for many same object association use cases, the ability to configure the limit of records that can be associated is a requirement.

[Learn More](#)

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#### Select object association

Use associations to identify and track the connections between your objects.

[Learn more](#)

Contacts-to-Companies ▾

#### Configure object association

- A **contact** can be associated to **many companies**.
- A **company** can be associated to **many contacts**.

Configure association limit ⓘ

## CRM Platform

# Median aggregation now supported in Single object and Custom report builders

When building a report in the single object report builder or the custom report builder, you can now choose Median as an aggregation type for your metrics.

### Use Case

Let's say you are looking to understand more about the standard sale amounts of your recently closed deals. Using an Average aggregation, it would divide the sum of deal amounts by the number of deals in the period you're reporting on, giving you the "average sales price." However, if you had some deal transactions the fell in either the extreme high or low range, your results could be greatly skewed one way or another. In contrast, using a Median aggregation identifies the middle value, since it arranges your deal amounts from smallest to largest, providing you the "median sales price." Median can showcase the true middle and provide a more accurate representation of data distribution, without being adversely influenced by extreme values.

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The screenshot displays the CRM report builder interface. On the left, the 'Configure' panel shows 'Chart Settings' with 'Median' selected as the aggregation type. The 'Edit field' panel shows the field name 'Median (Amount in company currency)' and the aggregation type 'Median'. The main report area shows a 'MEDIAN (AMOUNT IN COMPANY CURRENCY)' card with a value of '\$648.00'. Below the card, there are tabs for 'Unsummarized data' and 'Summarized data', and a table with columns for 'MEDIAN (AMOUNT IN COMPANY CURRENCY)' and a value of '\$648.00'. A 'Help' button is visible in the bottom right corner.



# CRM Platform

## Activity Log for Individual Lists

We're introducing the ability to easily track key changes that occur to any individual list. Inside any list, you can now see:

1. When a list was created, edited, deleted, or restored
2. When a list was used in another tool, such as an ad, a workflow, or a report
3. When a list was converted from active to static
4. When a list notification was triggered via List Settings (enterprise only)

You will also see who performed these actions.

### Use Case

As your company grows, you need to control and understand the significant events that have led to changes in your most important lists.

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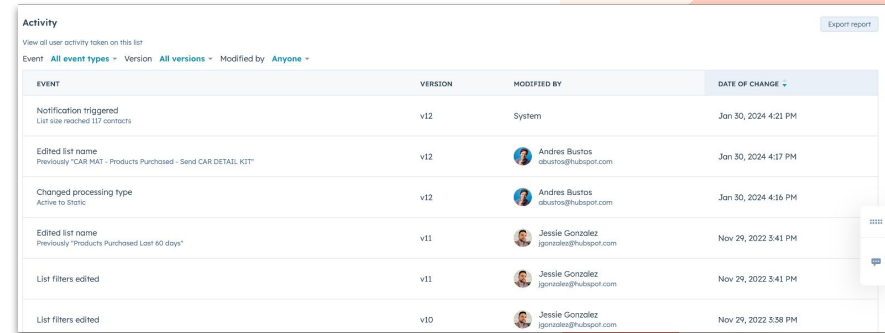
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The screenshot shows the 'Activity' section of a CRM interface. It features a table with columns for 'EVENT', 'VERSION', 'MODIFIED BY', and 'DATE OF CHANGE'. The table lists several events, including notifications triggered, list name edits, and changes in processing type. Each event entry includes a user profile picture and email address for the person who performed the action.

EVENT	VERSION	MODIFIED BY	DATE OF CHANGE
Notification triggered List size reached 117 contacts	v12	System	Jan 30, 2024 4:21 PM
Edited list name Previously "CAR MAT - Products Purchased - Send CAR DETAIL KIT"	v12	Andres Bustos abustos@hubspot.com	Jan 30, 2024 4:17 PM
Changed processing type Active to Static	v12	Andres Bustos abustos@hubspot.com	Jan 30, 2024 4:16 PM
Edited list name Previously "Products Purchased Last 90 days"	v11	Jessie Gonzalez jgonzalez@hubspot.com	Nov 29, 2022 3:41 PM
List filters edited	v11	Jessie Gonzalez jgonzalez@hubspot.com	Nov 29, 2022 3:41 PM
List filters edited	v10	Jessie Gonzalez jgonzalez@hubspot.com	Nov 29, 2022 3:38 PM

# CRM Platform

## List Notifications

We're introducing List Notifications to help Enterprise customers understand critical list changes in real-time. Now, get notified when:

1. A list is edited or deleted
2. A list size changes significantly (powered by HubSpot AI)
3. A list reaches a specific size

### Use Case

- Hosting an event with limited capacity? You can now receive a notification when your list reaches that capacity.
- Have a list of your most important customers? You can now receive a notification, powered by HubSpot AI, when there are sudden drops or increases in your list. This can help you quickly understand the impact of a campaign or any recent communications.

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### Notifications

**When this list is edited or deleted**

Setting this to "on" will trigger a notification anytime a list is edited or deleted.

Trigger this notification  ON

**When this list size changes significantly**

This setting uses HubSpot AI to find size anomalies in your list size.

Trigger this notification  ON

**When this list reaches a specific size**

Use this to trigger a notification when a list reaches a specific size. This number can be either higher or lower than the current list size.

Trigger this notification  ON

List size reaches

## CRM Platform

# New Source Property on all CRM Records

All records now have a new “Record Source” property which describes how the record was originally created.

### Use Case

All records have a new property called “Record Source.” This property can be used across HubSpot in everything from filtering data to building reports.

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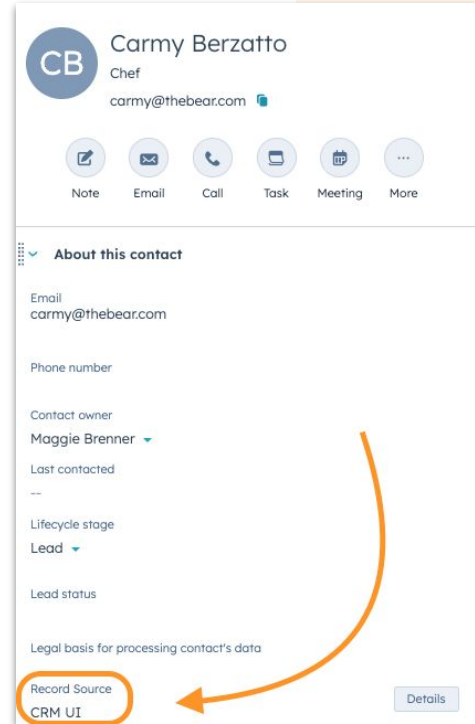
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## CRM Platform

# Find emails by any word or phrase in the email body through Global Search

You can now find an email by searching for any term present in the email body in Global Search. The emails show up under the "Emails" section in Global Search.

### Use Case

Say you are looking for customers who mentioned a specific product in an email or you want to look for the customers facing a specific issue so that you can update them on the fix -- until now, you could not find these specific email threads unless you had added the information in Notes or you remembered the email subject line. Now, you can easily search for terms used in an email conversation, directly from the Global Search.

Free

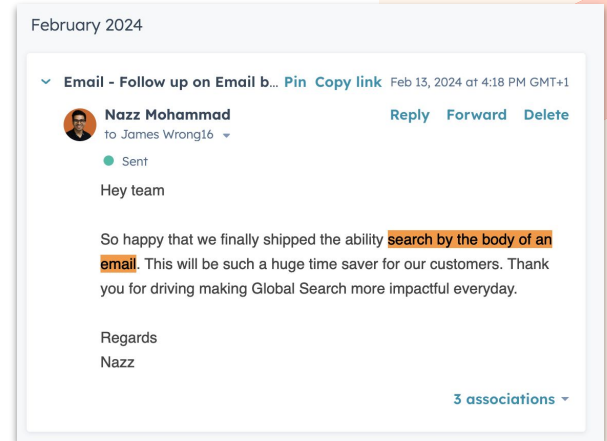
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## CRM Platform

# CRM Email Threading Improvements

Emails that log to the CRM and Conversations are now using an updated model to decide if that email belongs to an existing thread. This new logic better accounts for the subject line to properly thread, or not thread, emails.

### Use Case

When a new email is received by your connected inbox, HubSpot uses the email's metadata, called headers, to determine if it's related to an existing email thread in the CRM or Conversations. Sometimes this is not enough and there will be inconsistencies between what a user sees in HubSpot and their external email client. When unrelated emails wind up threaded together in HubSpot, so do their associated objects and other CRM logic. This gets messy quickly.

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# CRM Platform

## View Products Purchased from the Contact or Company Record

You can now see what products your customer has purchased from you, directly from the Contact or Company record.

### Use Case

Want to know if your customers have ever purchased your green bike product? How about what's the top item they buy from you? Where do they spend the most money with you?

Right now, you'd need to open all the associated deals, scroll to line items, then do a lot of mental modeling to find the answer.

Say hello to the new Product History card for the middle panel.

[Learn More](#)

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The screenshot displays a CRM interface for a company record. On the left, the company profile for 'Big 5 Sporting Goods' is shown, including contact information and a list of actions (Note, Email, Call, Task, Meeting, More). The main panel is divided into two sections: a table of recent orders and a 'Product history' card.

Order Name	Quantity	Unit Price	Total	Last Purchase Date
Big 5 Medical Supply Order	2	\$1,696,250	\$3,392,500	May 23, 2023 2:20 PM CDT
Bike Order	1	\$100,000	\$100,000	May 31, 2023 4:19 PM CDT
Medical Supplies Large Order	4	\$285,500	\$1,142,000	May 22, 2023 2:28 PM CDT
Yellow Sports Car	2	\$665,000	\$1,330,000	Mar 14, 2023 9:22 AM CDT

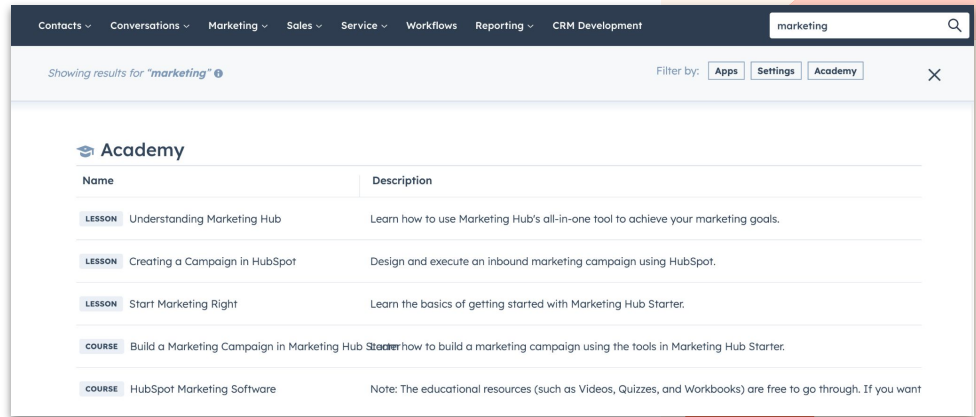
**Product history**  
Product history shows you an aggregated view of the products sold during the last 100 deals.

NAME	SKU	QTY	UNIT PRIC...	TOTAL	LAST PURCH...
Large order of bikes	IGBLA0...	2	\$50,000.00	\$100,000.00	05/22/2023
Medical Supplies	KIT00001	150	\$3,286.67	\$493,000.00	05/23/2023
Serialized Components	KIT00002	200	\$6,793.75	\$1,358,750.00	05/23/2023
Green Bicycle	WAR00...	1000	\$40.00	\$40,000.00	05/22/2023
Blue bicycle	WAR00...	100	\$900.00	\$90,000.00	05/22/2023

## CRM Platform

# All Academy courses, lessons & certifications under a single section in Global Search

In Global Search, you can now find all relevant Academy courses and lessons for your search in the same section making it easier for you to find all the relevant results in the same place. Tags mark which result is a COURSE and which one is a LESSON. If a course includes a certification, the tag will say CERTIFICATION.



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## 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.



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## App Marketplace & Integrations



## App Marketplace & Integrations

# Actionable Notifications in HubSpot's Microsoft Teams Integration

When configuring custom Microsoft Teams notifications via workflows, you now have the option to embed action shortcuts directly into the notification. These shortcuts enable you to quickly execute various actions within [Microsoft Teams](#), such as creating a task or note, logging a call, meeting, or email, updating a record, or emailing or calling a contact.

### Use Case

Imagine a scenario where you set up a workflow to send a reminder to a specific channel when a deal has remained in a specific stage for over 15 days. Now, you can embed actionable shortcuts within this notification, such as:

- Create Task: Prompting you or a teammate to create a task for follow-up with the contact.
- Update Deal: Enabling you to modify crucial information pertaining to the deal.
- Create Note: Providing relevant context directly on the record page.

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*\*Workflows are available to customers with Professional plans or above. In addition, workflows with Microsoft Teams are available to users whose admins have installed the integration using the 'Full Install' option.*

The screenshot shows a configuration window titled "Send Microsoft Teams Notificat...". It includes a "Cancel" button and a "Save" button. The configuration is as follows:

- Users:** A dropdown menu with "Choose a value".
- Team \*:** A dropdown menu with "Sales Team".
- Channel \*:** A dropdown menu with "Deal Updates".
- Message \*:** A text area containing two lines of text: "\*\* Deal Name \*\* has been in stage \*\*" and "\*\* Deal Stage \*\* for 15 days now." There is a "Deal token" icon to the right.
- Send notification to record owner
- Select actions to include with message:** A list of action shortcuts: "Create Task", "Create Note", "Email Contact", and "Update Deal".
- Properties always included with the action:** A list containing "Deal owner".

# App Marketplace & Integrations

## DocuSign Middle Panel Enhancements

The new DocuSign middle panel card will now allow you to manage your DocuSign envelopes and documents more easily. You can:

- Review and manage the status of your DocuSign envelopes directly from the contact, companies or deal record screen.
- Manage associations, attach or create new DocuSign envelopes.
- View envelope history and detail, like recipient status, senders and dates.
- Attach new DocuSign envelopes from templates and launch the envelope editor screen.

### Use Case

You can effortlessly send documents to your prospects while maintaining seamless context within your workflow.

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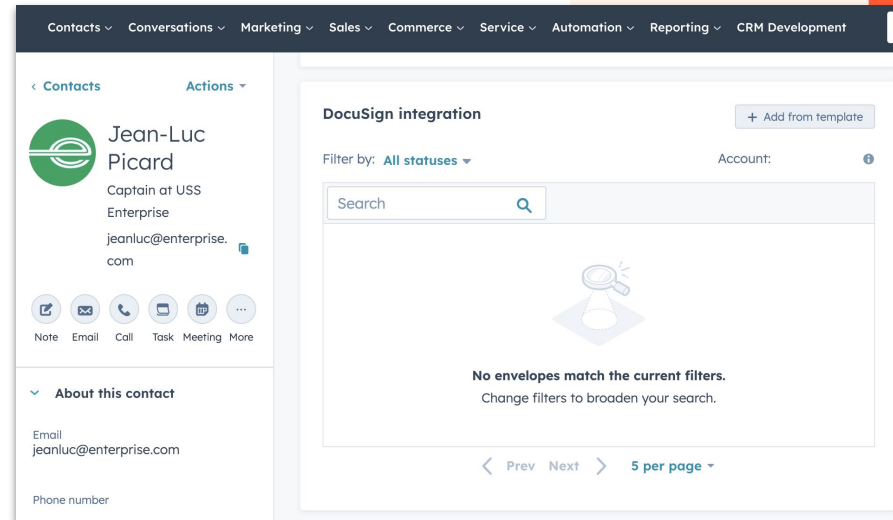
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# App Marketplace & Integrations

## Limiting Multiple Template Submission

Starting Monday, February 19, 2024, [HubSpot Template Marketplace](#) providers will be limited to submitting one template type – theme and/or module – for review and listing at a time. Any submission exceeding this limit will be automatically rejected until all submissions in review are approved or withdrawn.

### Use Case

This change aims to increase the efficiency of the listing process and improve the quality of submissions. By setting submission limits, our goal is to encourage thoughtful template submissions, reduce similar edits among multiple submissions, and expedite the review process.

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## App Marketplace & Integrations

# Bidirectional custom object sync between Salesforce and HubSpot

You can now update custom objects in Salesforce directly from HubSpot, in addition to syncing them from Salesforce to HubSpot. With bidirectional custom object sync, you can ensure that your Salesforce environment stays consistently current with the latest changes.

### Use Case

Custom objects serve a multitude of purposes and have proven highly beneficial when synchronized with your Salesforce environments. Now, HubSpot is enhancing our custom object sync capability by enabling full bidirectional synchronization.

As always, you are in full control, setting the precise sync rules and triggers that align with your needs and preferences.

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The screenshot shows a multi-step configuration process. At the top, a progress bar indicates 'Step 1 of 6' with the title 'Sync custom object' and a sub-header 'MAP OBJECTS'. The main instruction reads: 'First, choose the objects you want to sync.' Below this, a box states: 'You're setting up a two-way sync. Objects will sync data between Salesforce and HubSpot.' The interface features two selection boxes: 'Salesforce object' (with a dropdown menu showing '- Select -') and 'HubSpot custom object' (also with a dropdown menu showing '- Select -'). A central 'Two-way sync' button with a double-headed arrow icon connects the two selection boxes.