Partner Product Updates

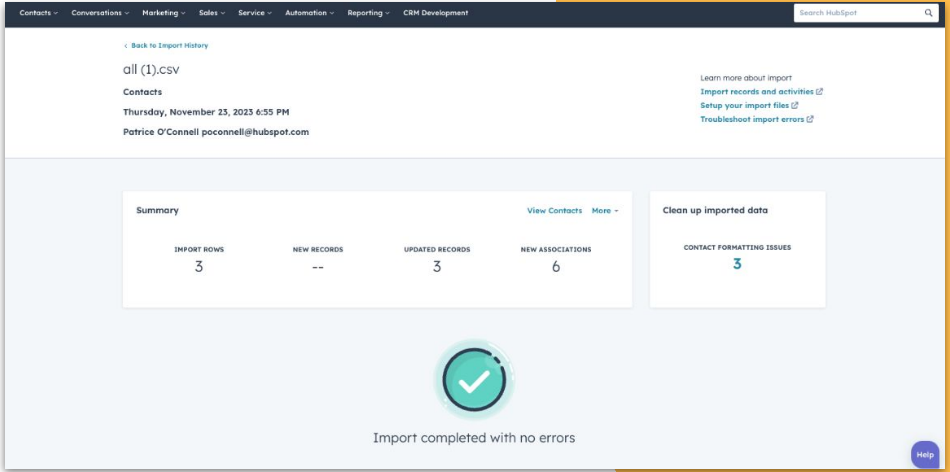
March 2024 (February 2024 Updates)

HubSpot

Marketing Hub™

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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Launch region: Global

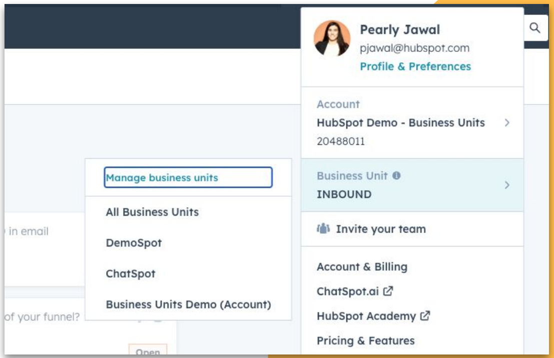
Marketing Hub™

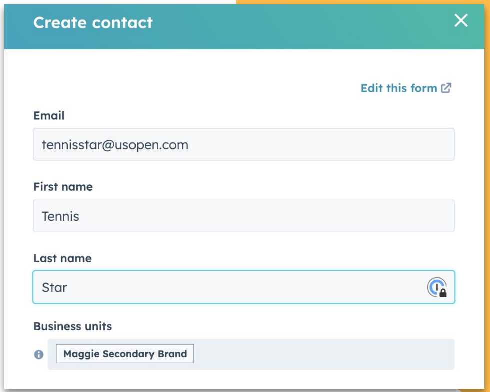
Business Unit Updates to Navigation, Record Creation, and Opt-out Imports

'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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Launch region: Global

Marketing Hub™

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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Launch region: Global

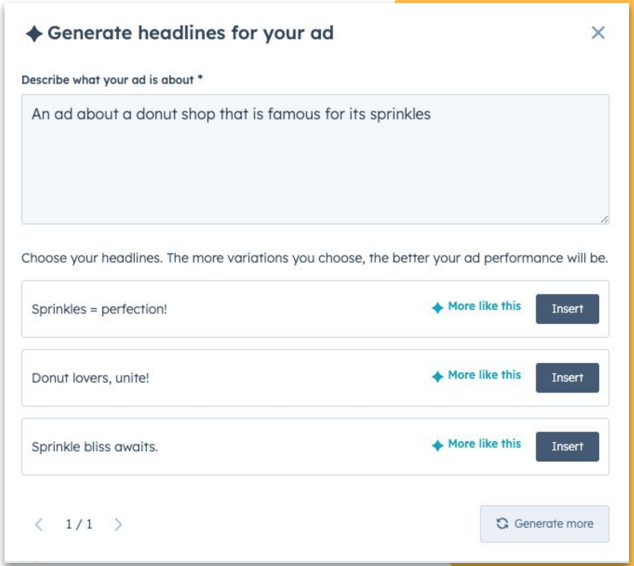
Marketing Hub™

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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Marketing Hub™

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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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™

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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Launch region: Global

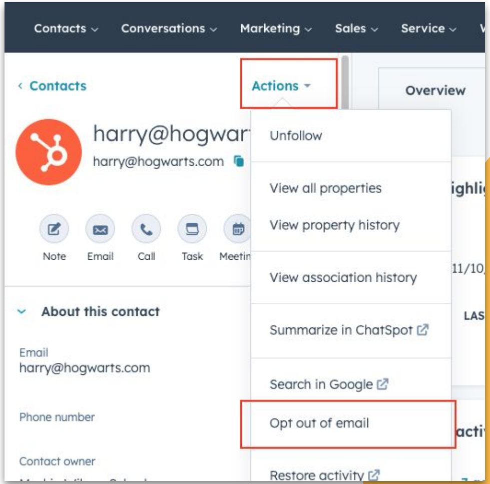
Marketing Hub™

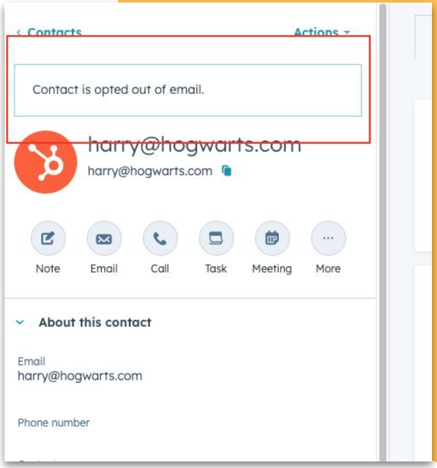
Opt-out all email per business unit from contact's record

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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Launch region: Global

HubSpot

Marketing Hub™

Enable Double Opt-In for Forms

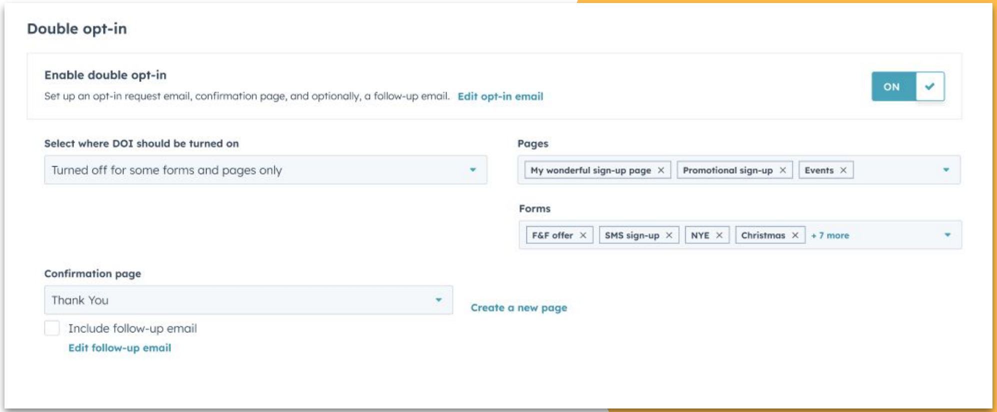
Historically, it was only possible to enable/disable double opt-in for select pages created in HubSpot.

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

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.



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Launch region: Global

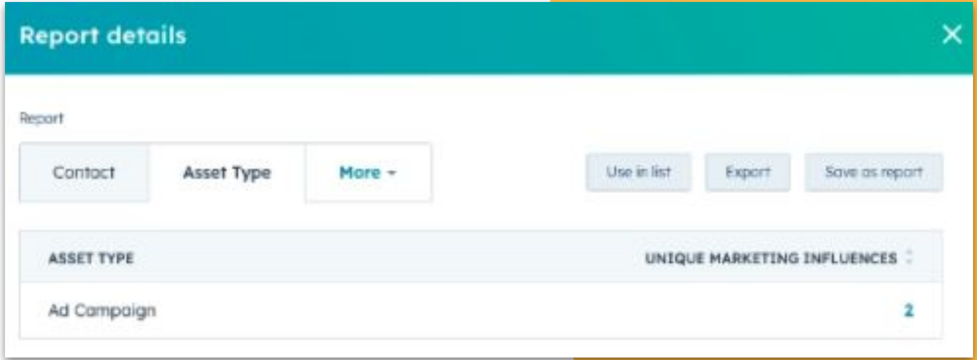
Marketing Hub™

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.



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Marketing Hub™

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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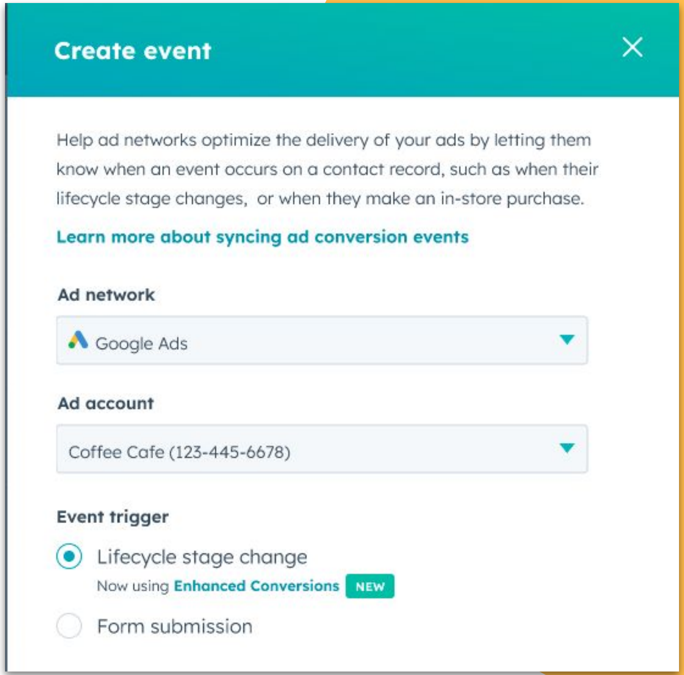
Launch region: Global

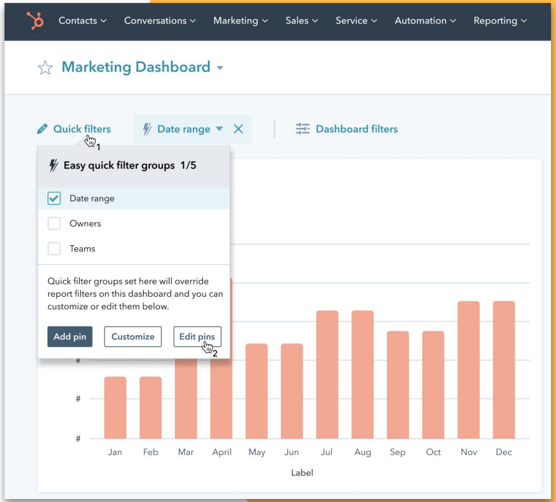


Marketing Hub™

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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Launch region: Global

Marketing Hub™

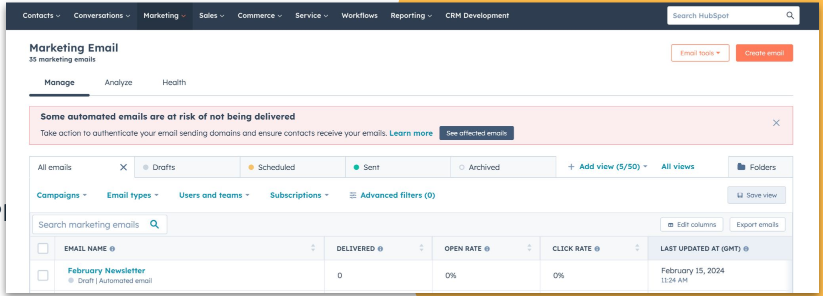
Domain Authentication Alert on the Marketing Email Manage Page

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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Launch region: Global

HubSpot

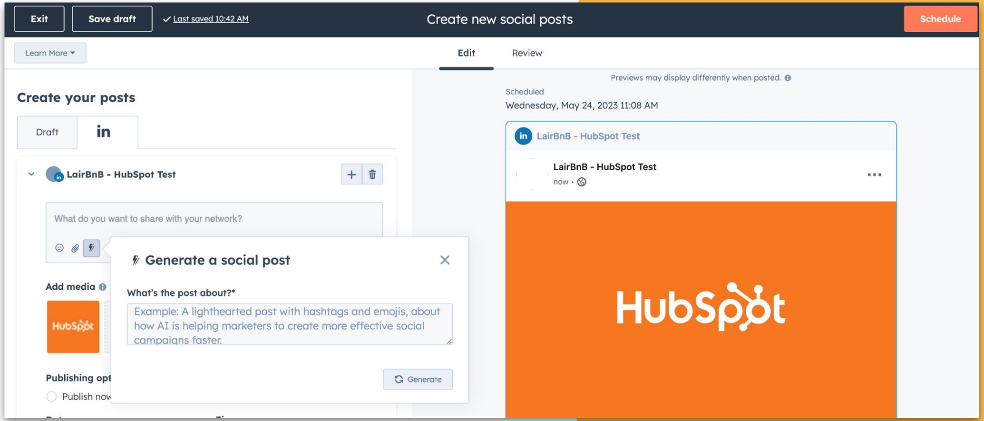
Marketing Hub™

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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Launch region: Global

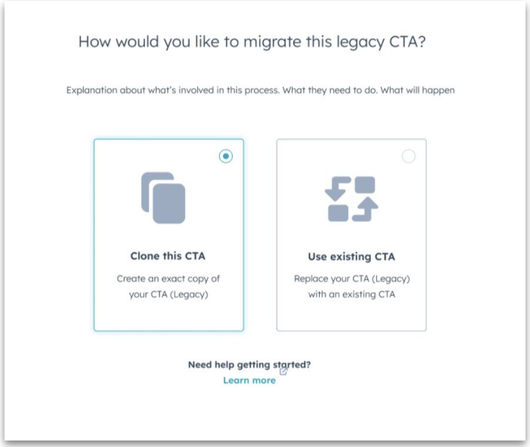
Marketing Hub™ + CMS Hub®

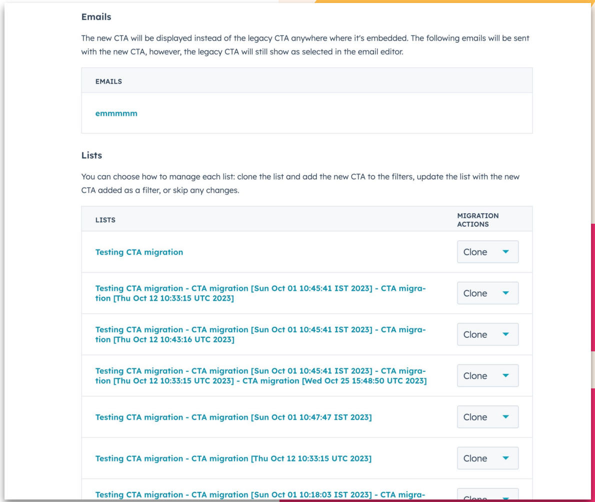
Legacy CTA Migration feature

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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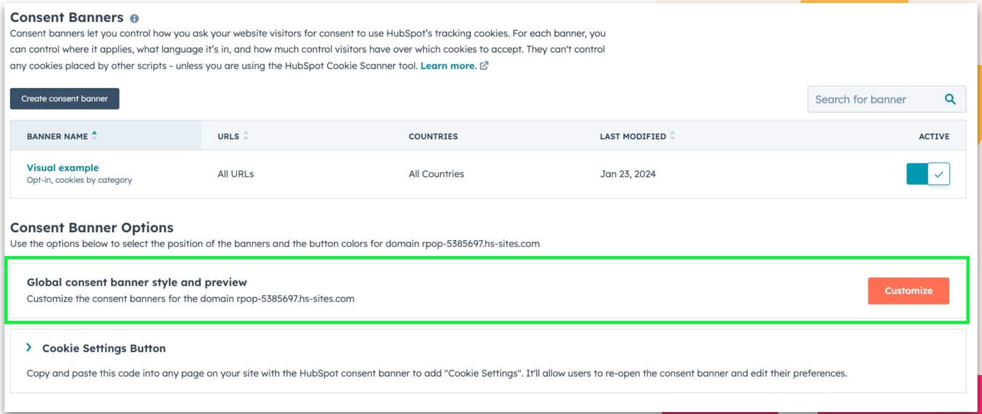
Launch region: Global

Marketing Hub™ + CMS Hub®

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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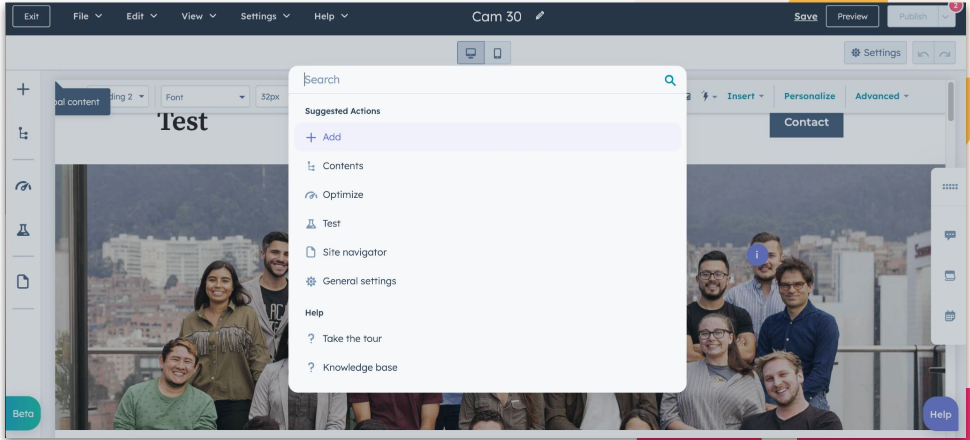
Launch region: Global

Marketing Hub™ + CMS Hub®

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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Launch region: Global

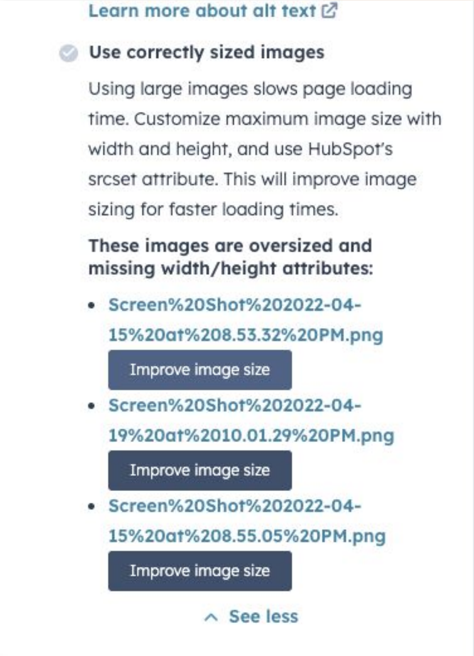
Marketing Hub™ + CMS Hub®

"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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Launch region: Global

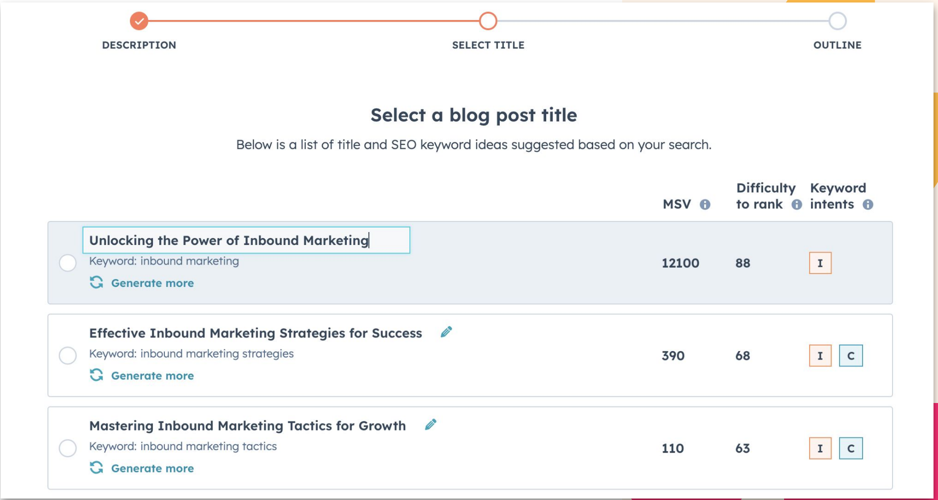
Marketing Hub™ + CMS Hub®

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!



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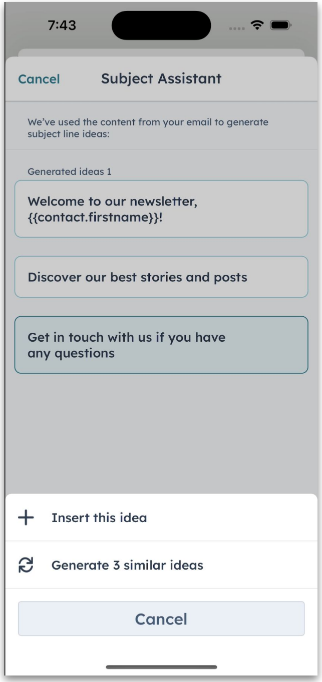
Launch region: Global

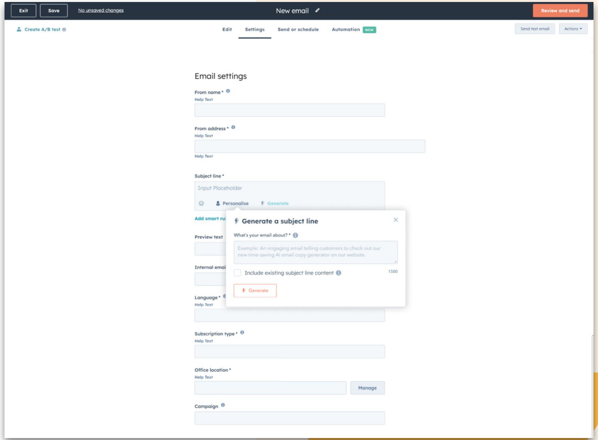
HubSpot

Marketing Hub™ + CMS Hub®

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, complimenting 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]

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Launch region: Global

Marketing Hub™ + CMS Hub®

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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Launch region: Global

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

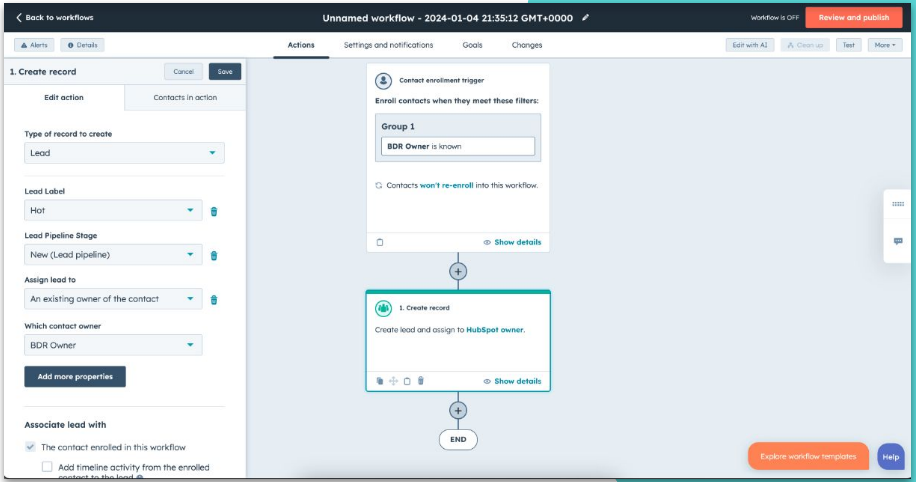
Sales Hub™ + Service Hub™

Sales 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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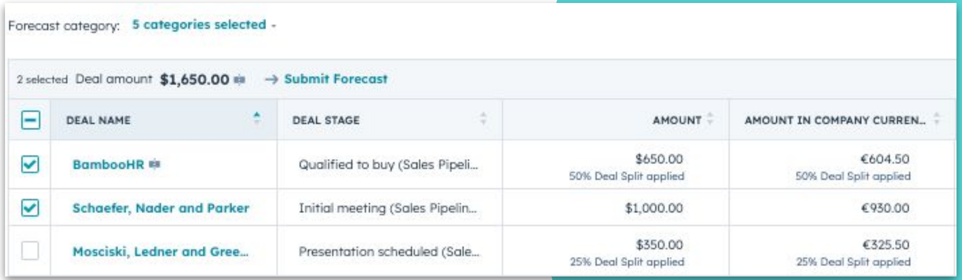
Launch region: Global

Sales Hub™

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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Launch region: Global

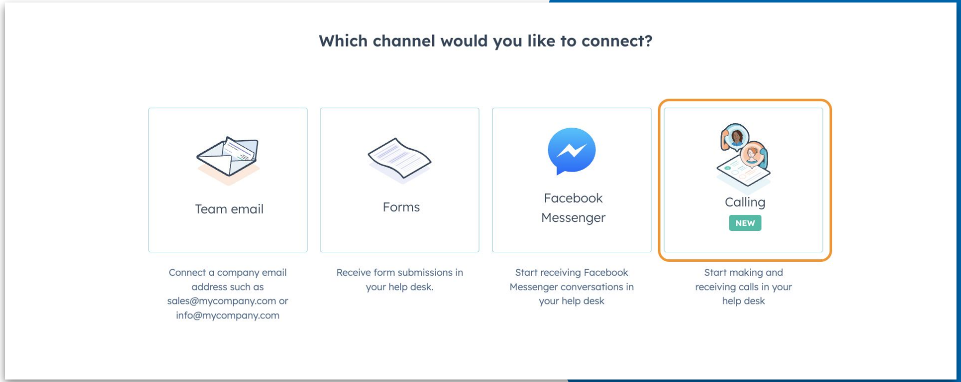
Service Hub™

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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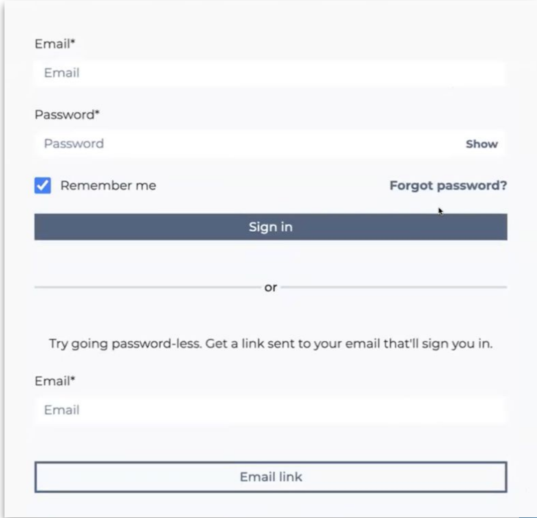
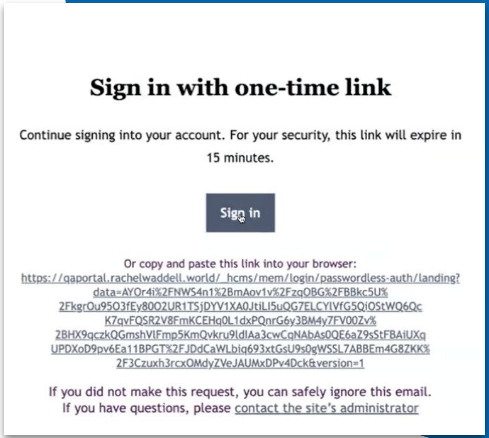
Launch region: Global

Service Hub™

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

Launch region: Global

HubSpot

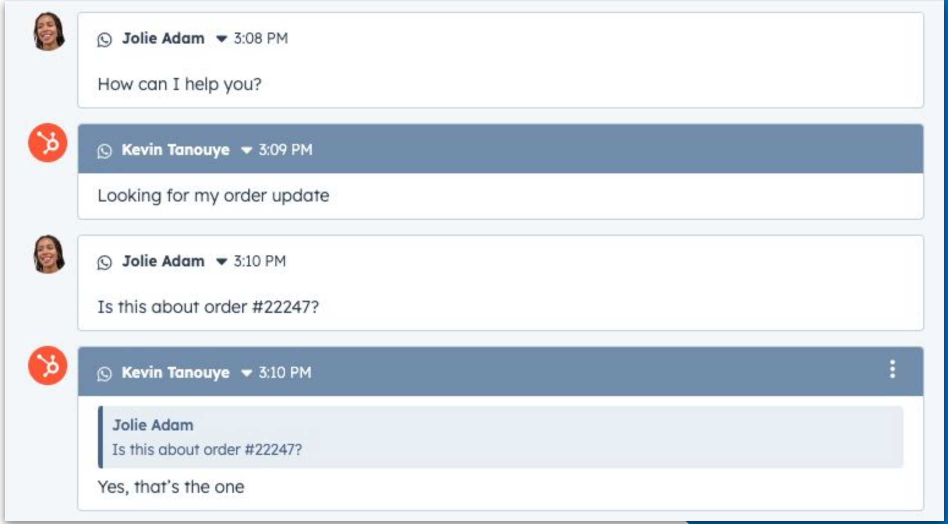
Service Hub™

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.



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Launch region: Global

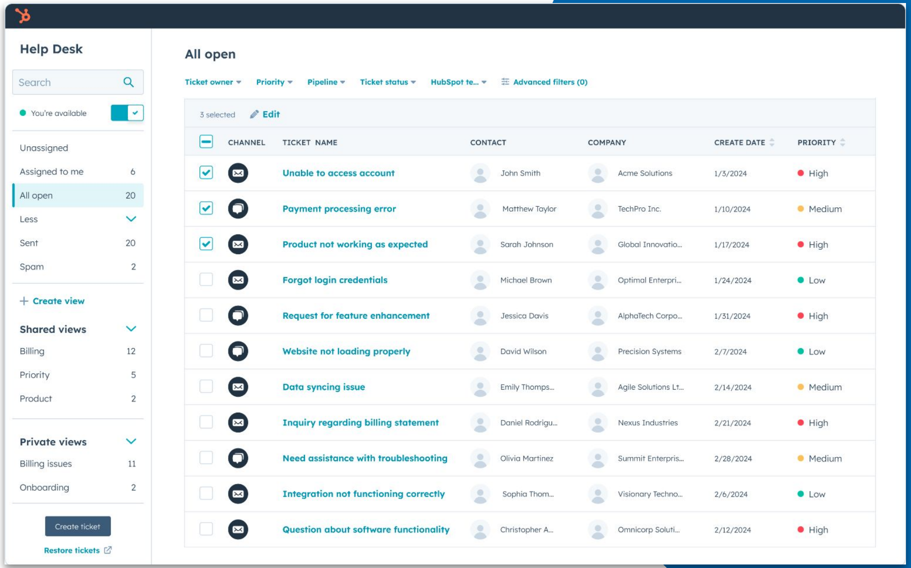
Service Hub™

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.



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Launch region: Global

Sales Hub™ + Service Hub™

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

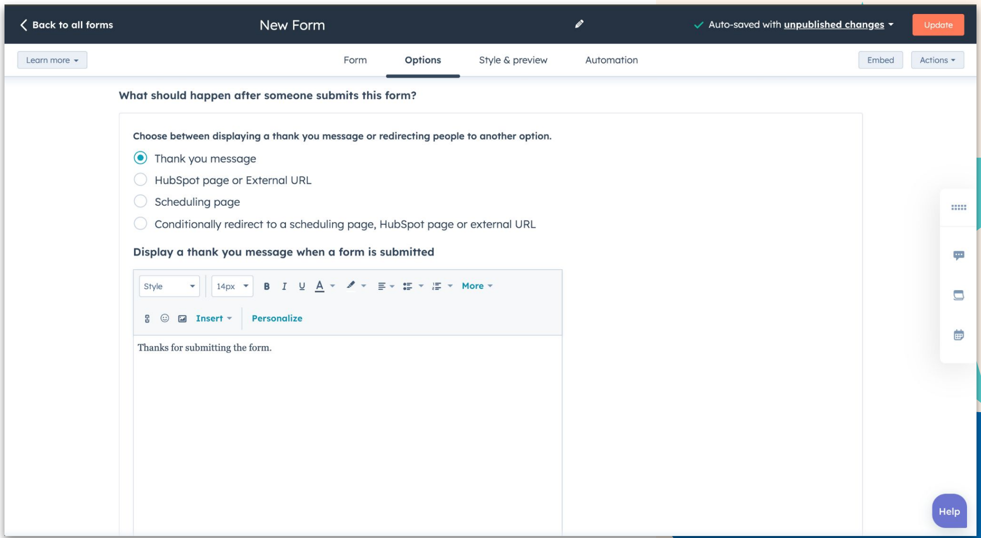
Free Starter **Pro** **Ent** **Public Beta**

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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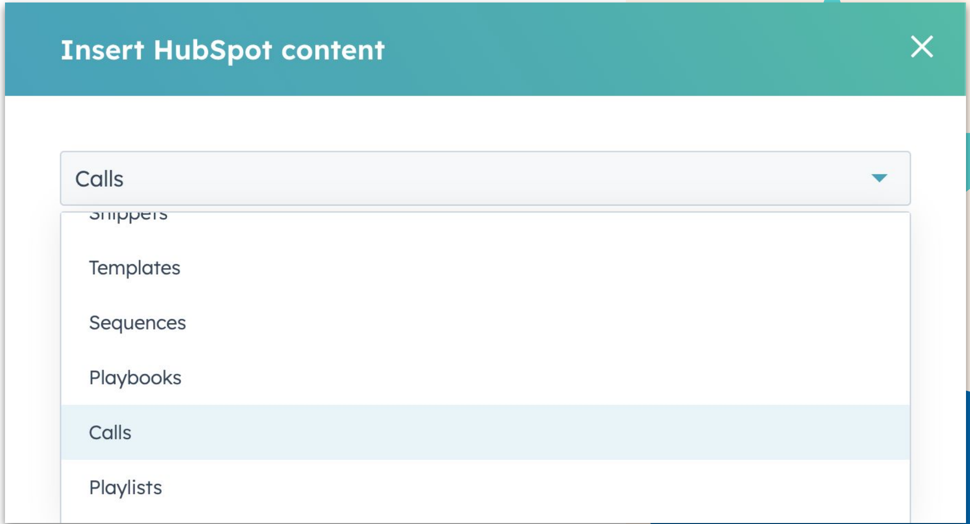
Launch region: Global

Sales Hub™ + Service Hub™

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]

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Sales Hub™ + Service Hub™

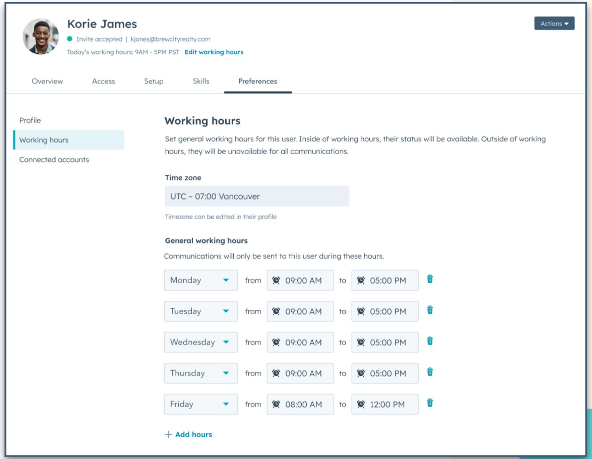
User Working Hours for Inbox and Help Desk

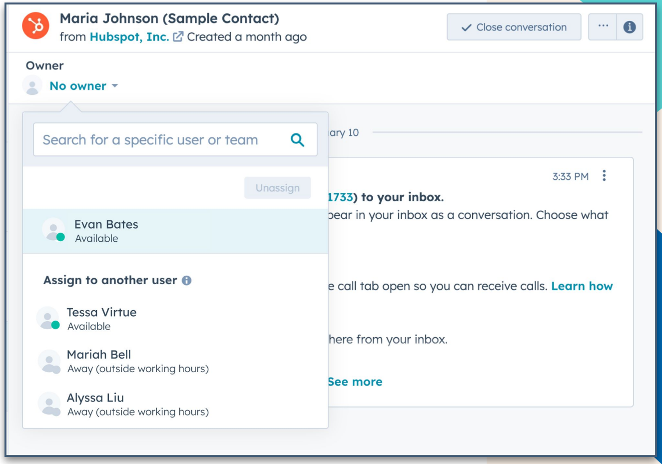
With user working hours, Admins and individual users can set weekly working hours based on the user's time zone, which might vary from the account's or their team's time zones. When a user is outside of their working hours, their availability will be changed to Away and they won't be eligible for automatic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





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Launch region: Global

Sales Hub™ + Service Hub™

Change language for calling consent messages

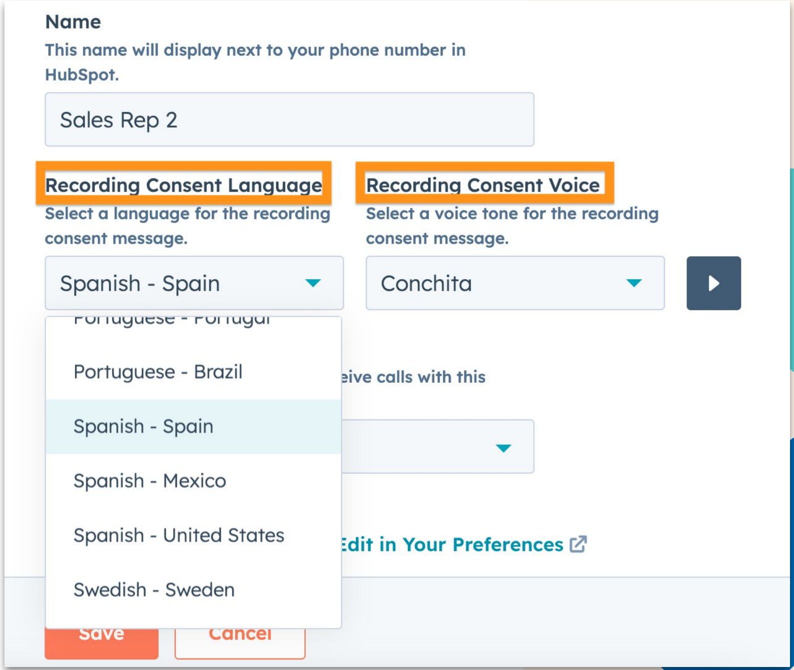
Initially available only in English, we've extended the functionality to change the language for calling consent messages to accommodate our growing international user base. Now you can effortlessly change the language of the consent message, which gives you more control over your calling experience.

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



Sales Hub™ + Service Hub™

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.

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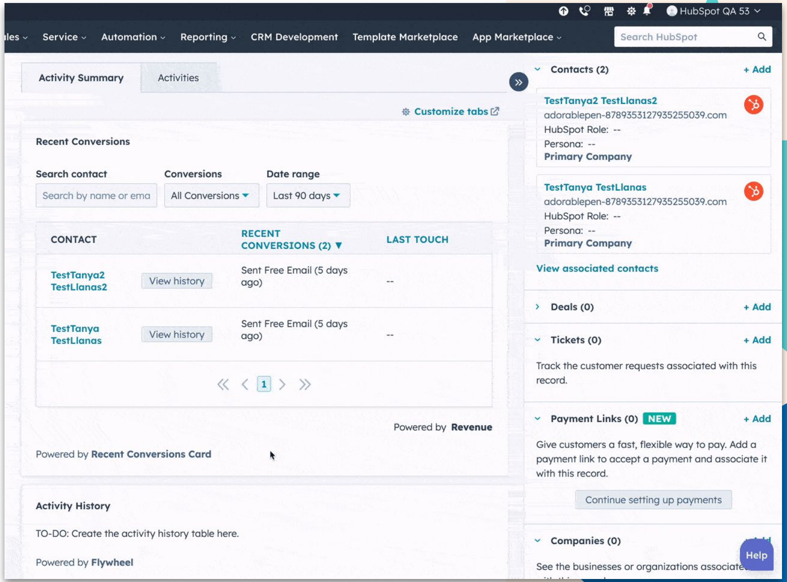

Sales Hub™ + Service Hub™

UI extensions: custom logger to debug card failures

When an extension fails to load or function during it's 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.

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Launch region: Global

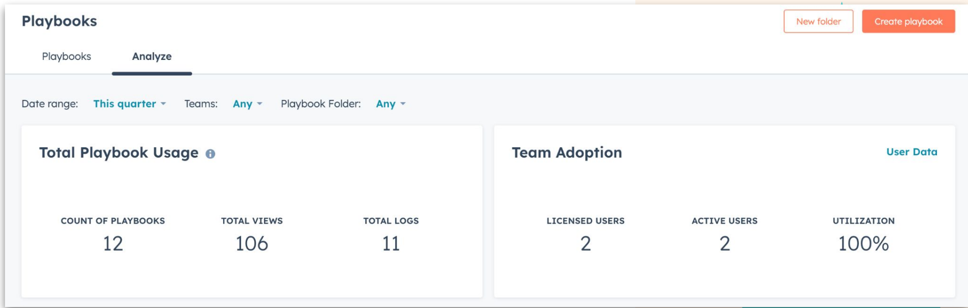
Sales Hub™ + Service Hub™

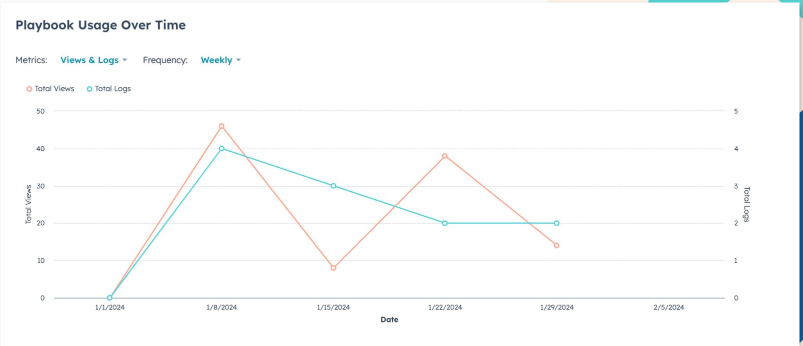
Report on and analyze Playbook use

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

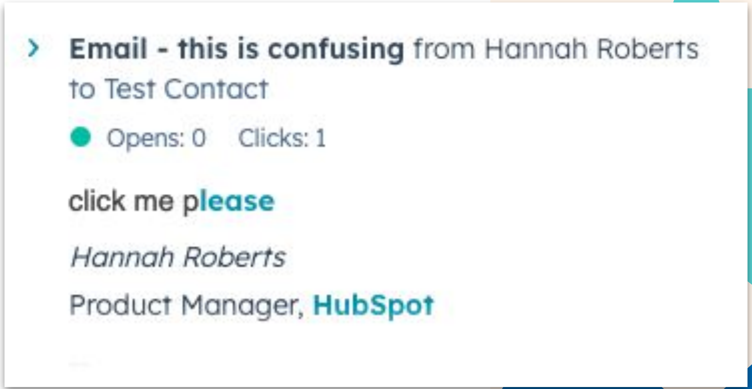
Sales Hub™ + Service Hub™

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

Free | Starter | Pro | Ent | Public Beta

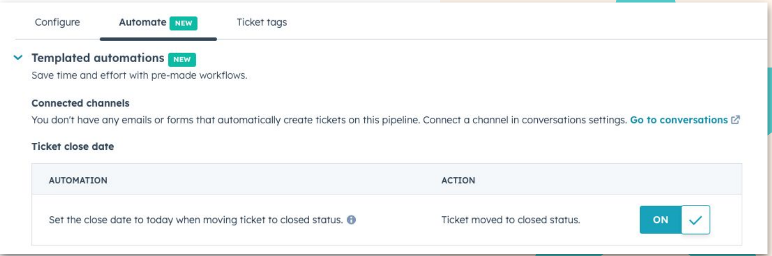
Launch region: Global

Sales Hub™ + Service Hub™

"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).

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

Launch region: Global

Operations Hub™

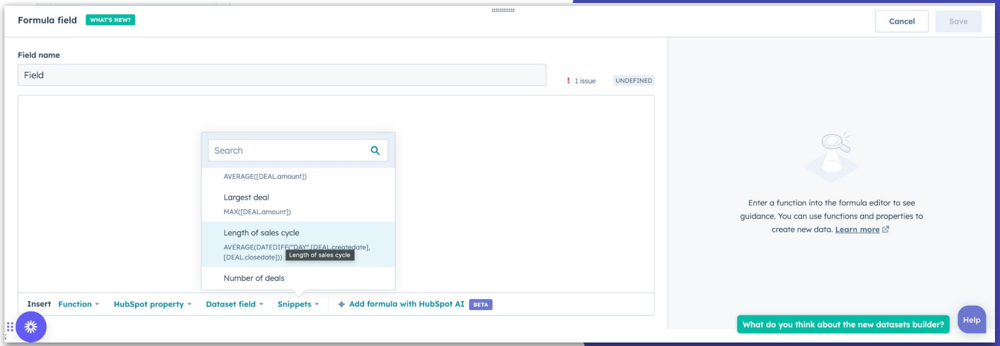
Operations Hub™

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

Operations Hub™

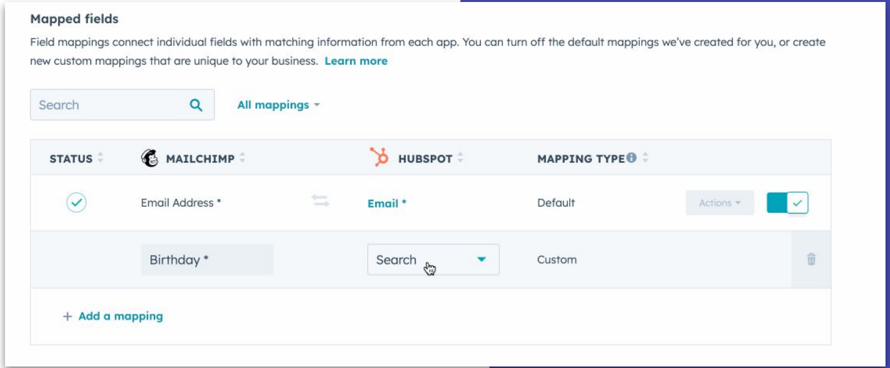
Required Field Mappings in Data Sync

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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Launch region: Global

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

Operations Hub™

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!

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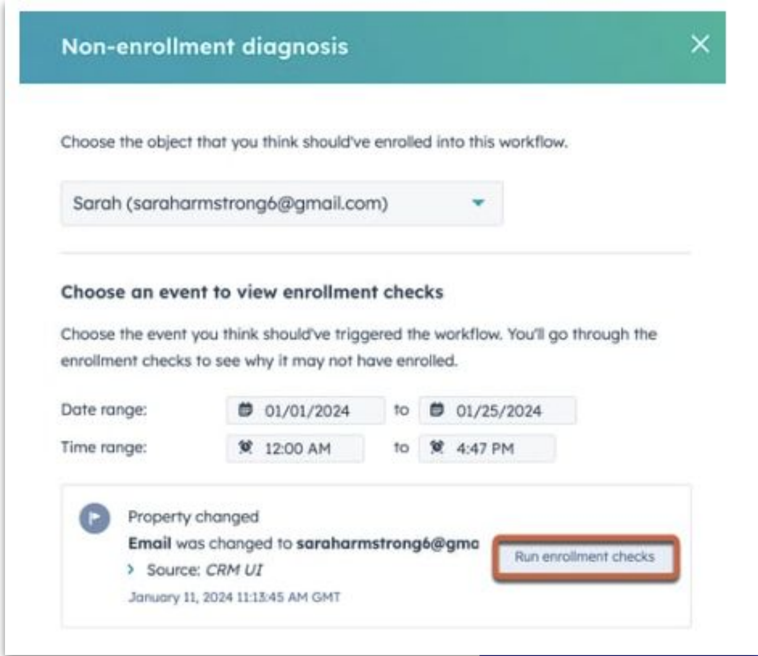
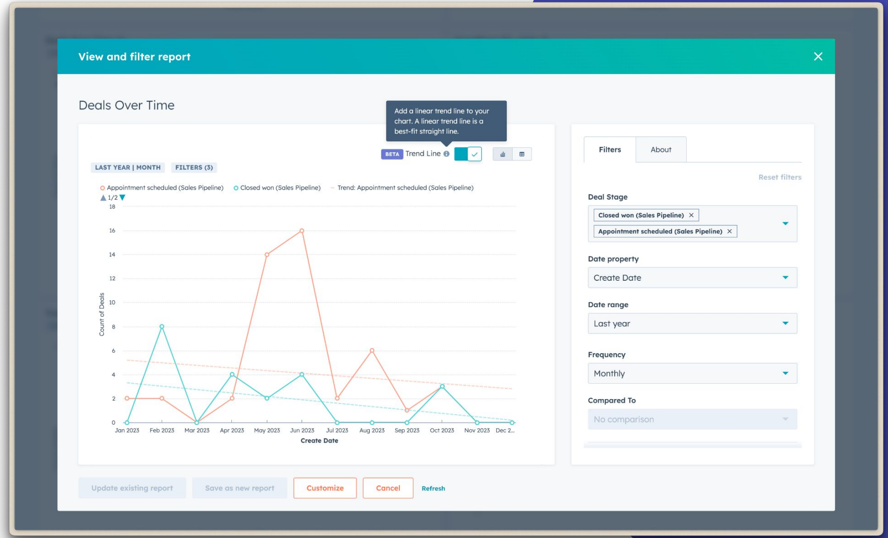


Operations Hub™

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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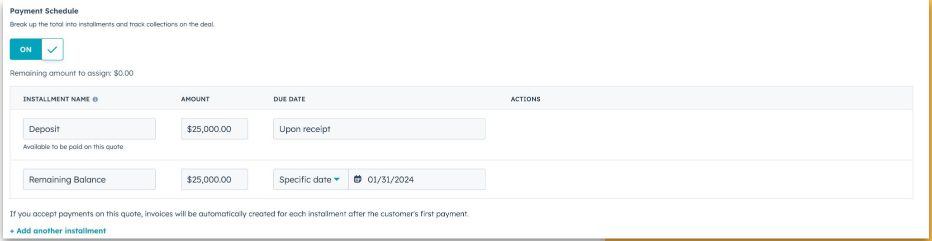
Launch region: Global

Commerce Hub™

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.

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Commerce Hub™

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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Launch region: Global

Commerce Hub™

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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Launch region: Global

CRM Platform

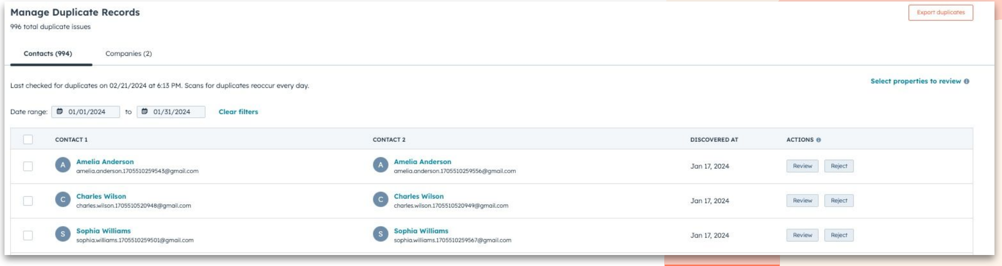
CRM Platform

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.



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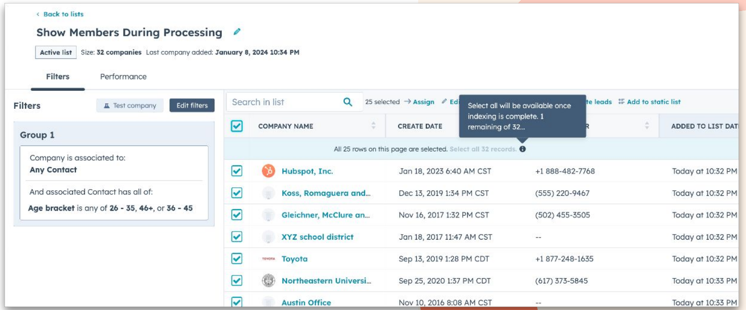
Launch region: Global

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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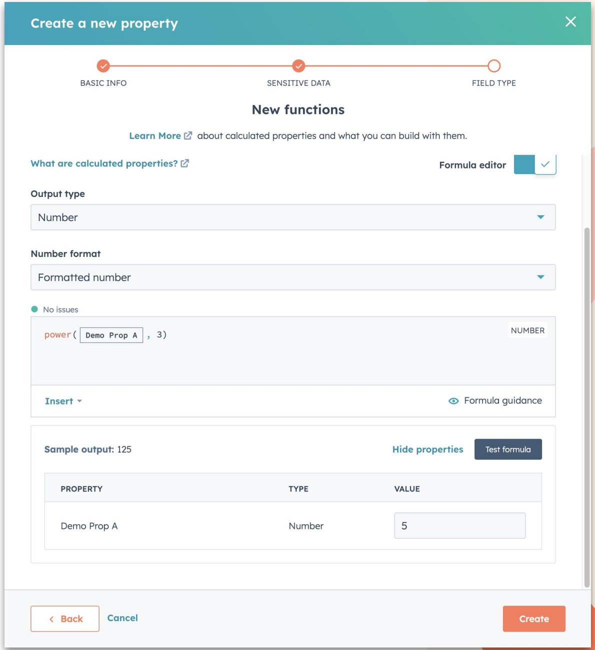
Launch region: Global

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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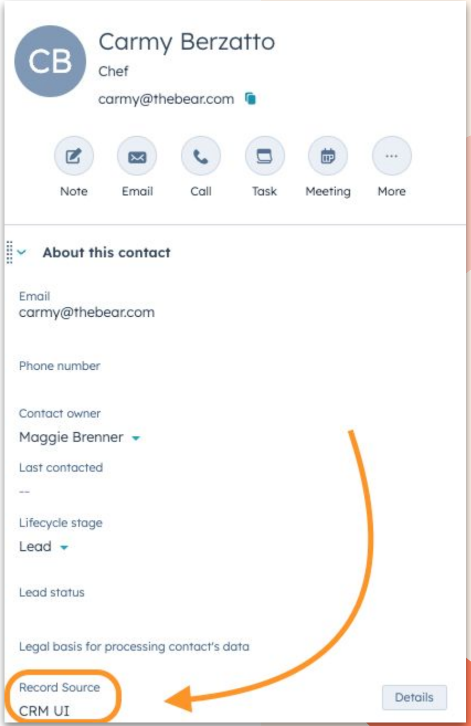
Launch region: Global

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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Launch region: Global

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]

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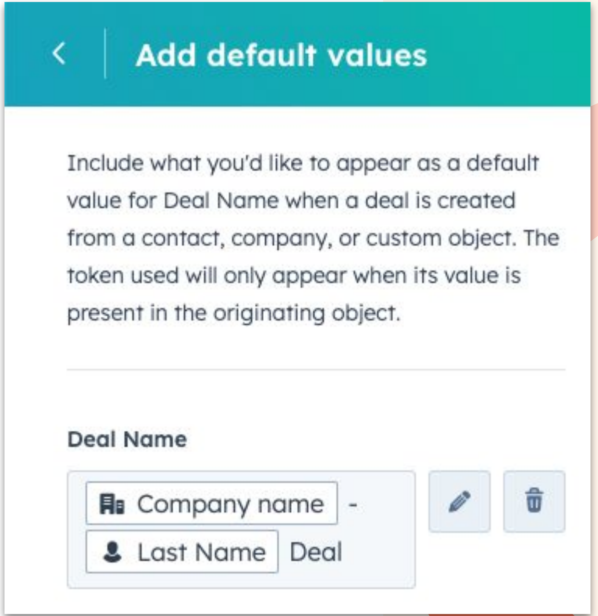
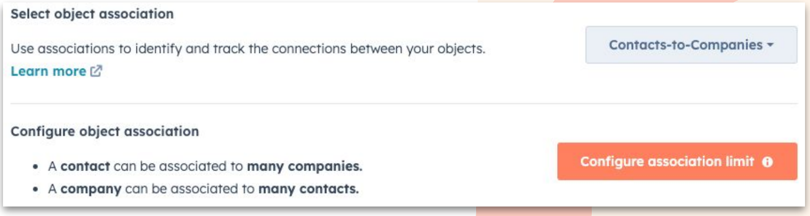


Launch region: Global

**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.*

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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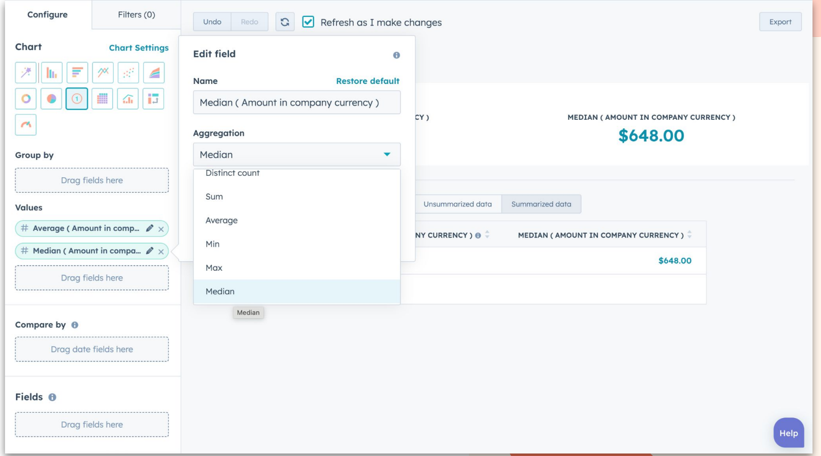
Launch region: Global

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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Launch region: Global

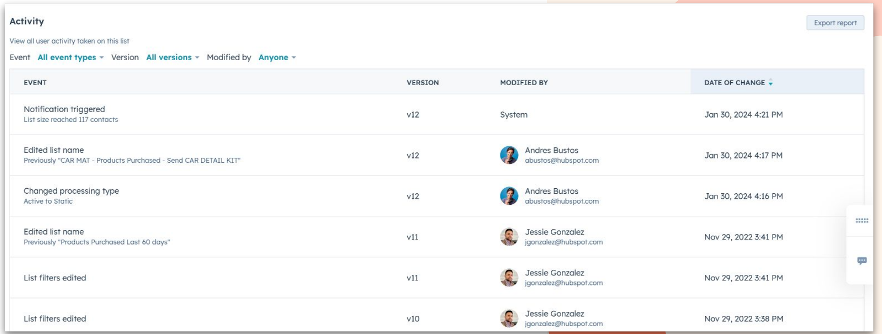
CRM Platform

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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Launch region: Global

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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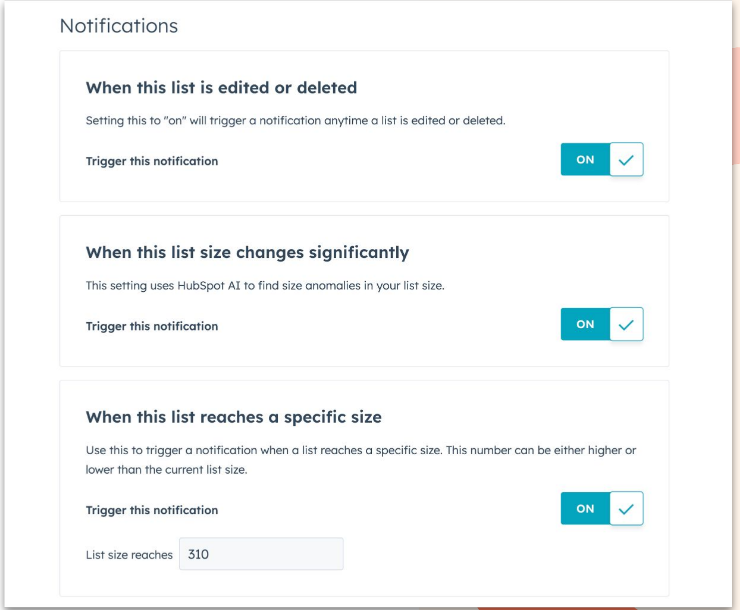
Launch region: Global



CRM Platform

New Source Property on all CRM Records

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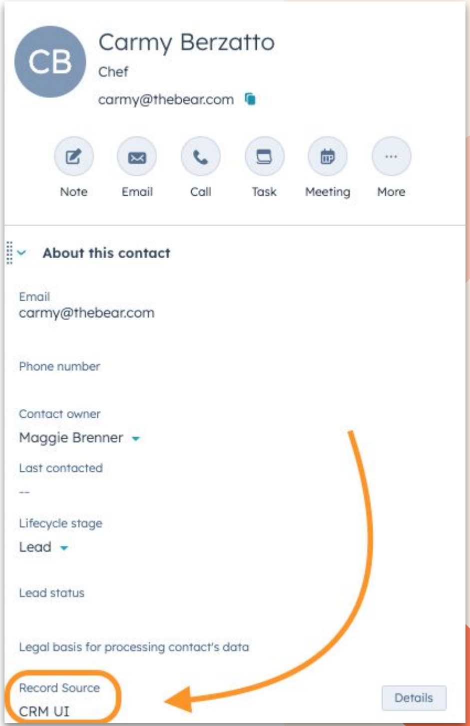
Use Case

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

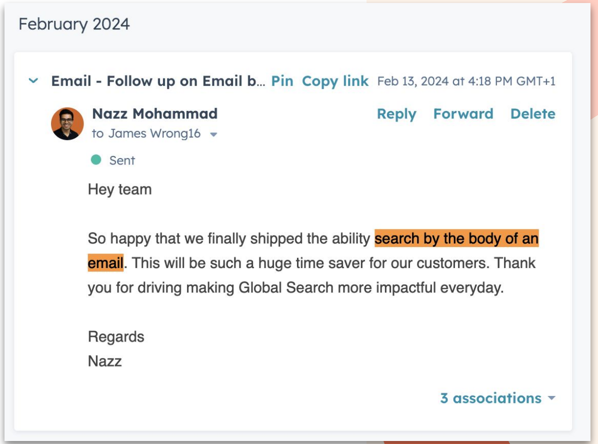


Free Starter Pro Ent Live

Launch region: Global

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.

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Launch region: Global

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.

Free Starter Pro Ent Live

Launch region: Global

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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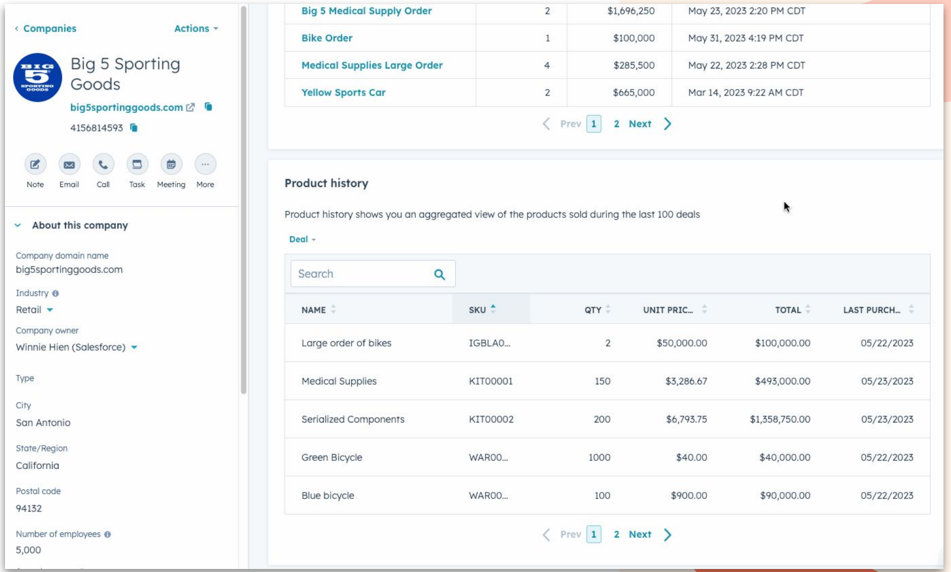
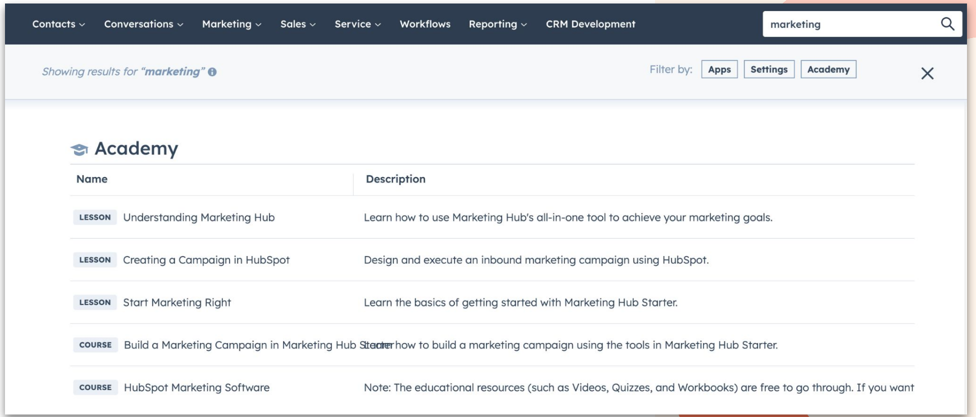
Launch region: Global



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.



Free Starter Pro Ent Live

Launch region: Global

Help has moved to the top navigation

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

Use Case

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

Free Starter Pro Ent Live

Launch region: Global

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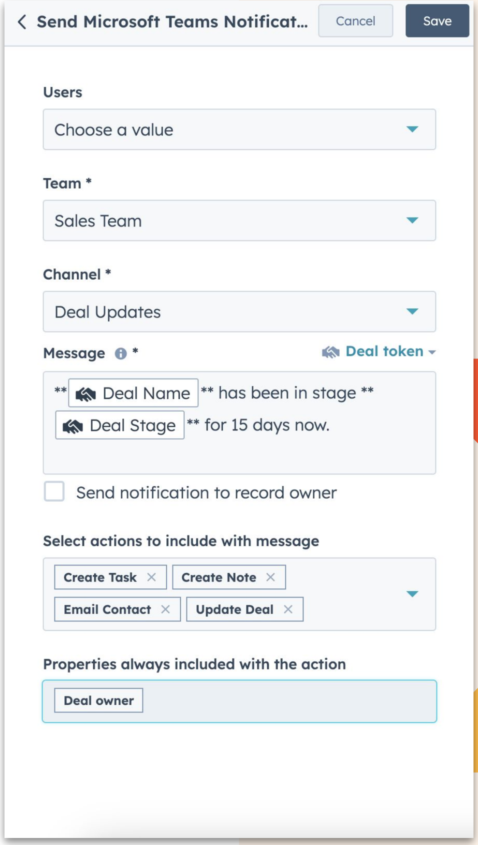
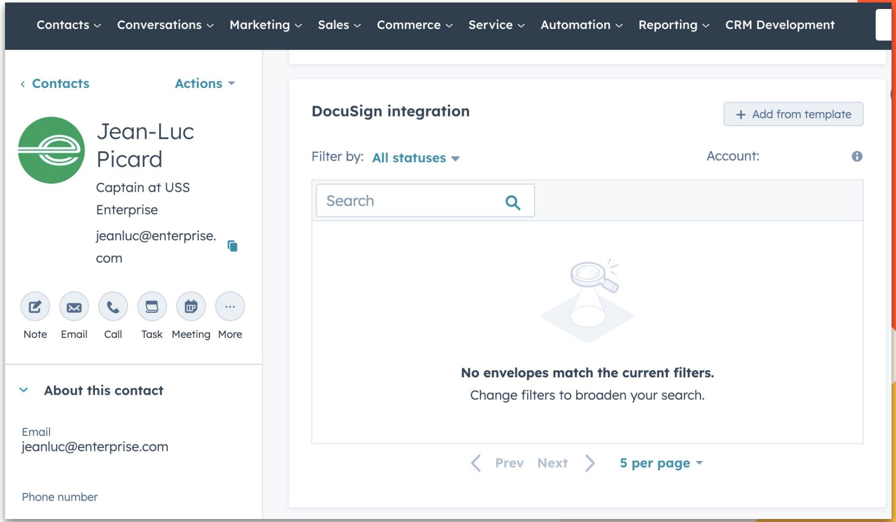
**Workflows are available to customers with Professional plans or above. In addition, workflows with Microsoft Teams are available to users whose admins have installed the integration using the 'Full Install' option.*



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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Launch region: Global

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.

Free Starter Pro Ent Live

Launch region: Global

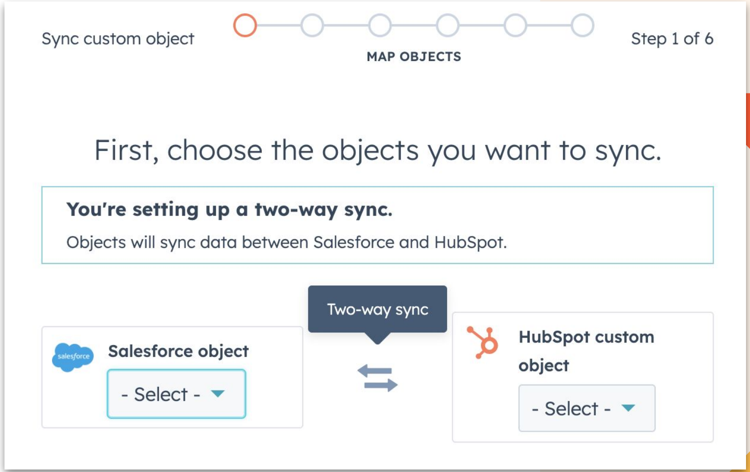
Bidirectional custom object sync between Salesforce and HubSpot

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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Launch region: Global