

HubSpot Product Update February 2023

Product update of the month

- Dashboard filters

Marketing Hub

- Facebook CAPI for Forms
- Automation in Starter for Ads

Sales & Service Hub

- Fiscal Year in Goals and Forecast
- View and share Meeting Links on the HubSpot Mobile App

HubSpot CRM Platform

- Configure associations when a record is created
- New Lists Navigation & Details Side Panel
- Thread Toolbar and Preview Cards in Conversations
- New Logged Activity Options on the Android app

Product Update of the Month



Dashboard filters

The new and improved dashboard filters experience. Customers will be able to apply dashboard filters using a wider variety of properties to single object and cross object reports.

Free

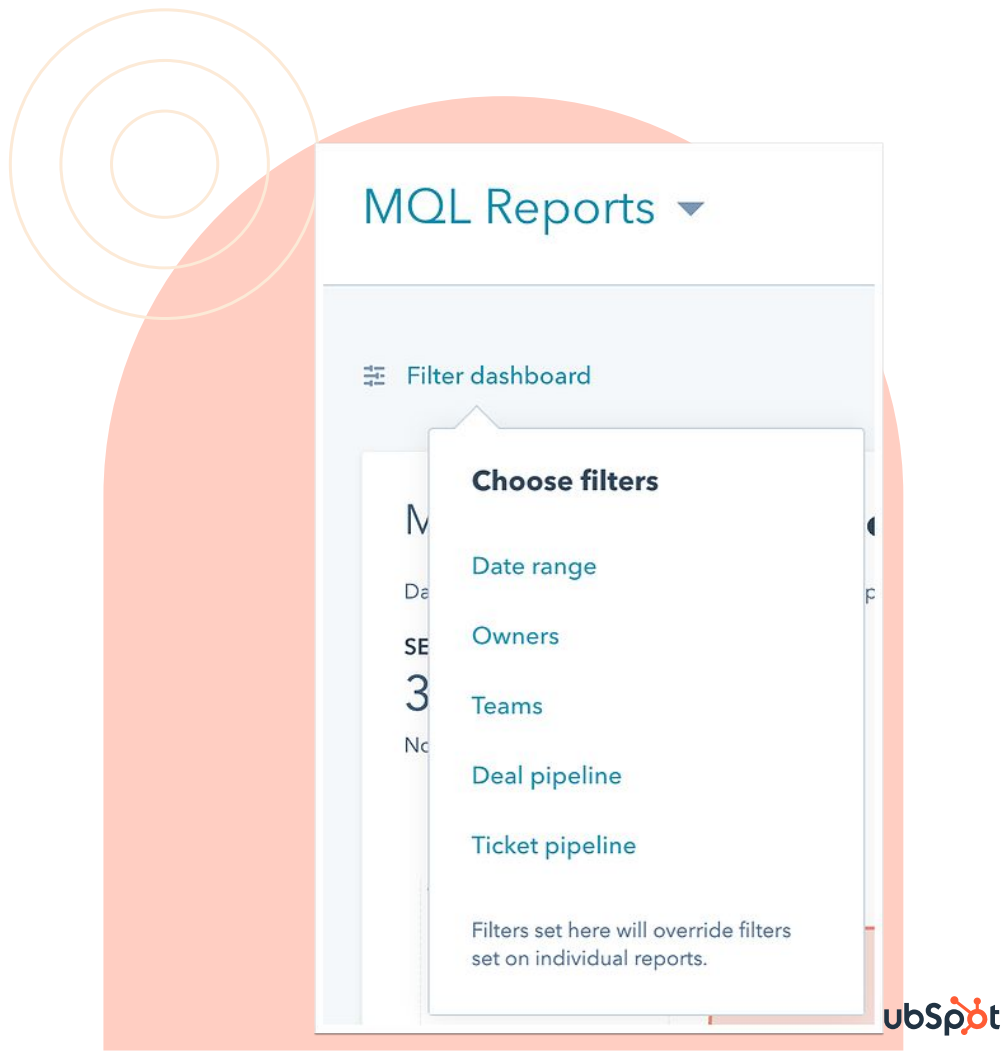
Starter

Pro

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Live

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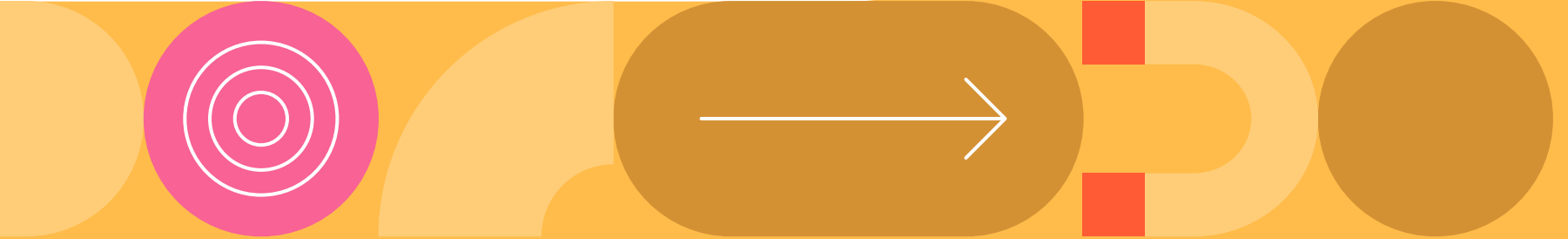




Marketing Hub™



CMS Hub®



Facebook CAPI for Forms

HubSpot has expanded our integration with Facebook's Conversion API. Now you can send any HubSpot form fill event data back to Meta as a conversion in an easy to use integration.

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Public Beta

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Create event ✕

Ad network
Facebook

Ad account
Katie's Threads

Event trigger
 Lifecycle stage change ⓘ
 Form submission **NEW**

Pixel ⓘ
Katie's Threads Pixel - FACEBOOK (584548606074586)

HubSpot Form
Email List Sign Up Homepage

Predictive Lead Score (Optional)
 Send the HubSpot Predictive Lead Score for form submission to Meta to use as the predictive lifetime value of a conversion event

Facebook conversion event
Lead

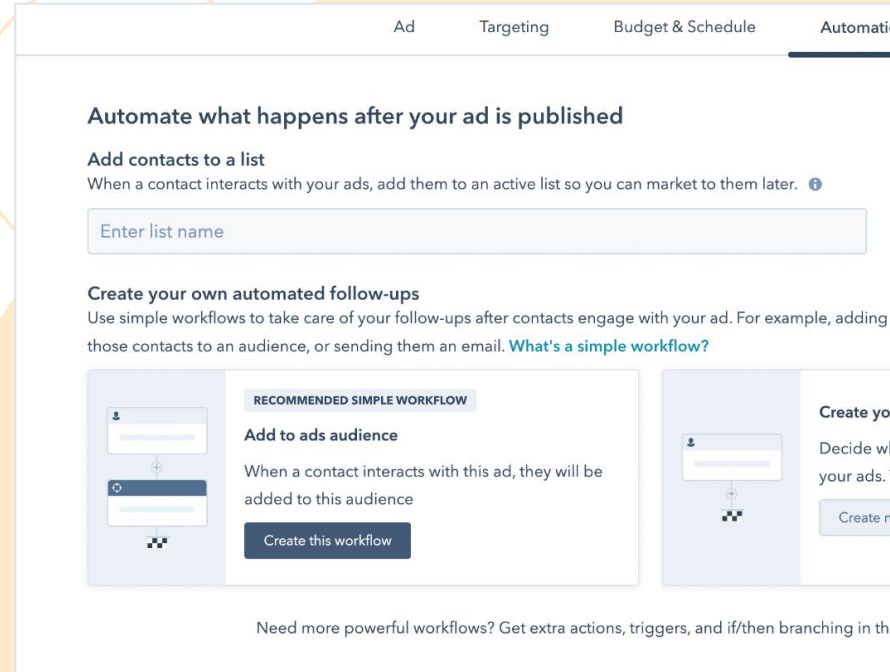
Create event Cancel

Automation in Starter for Ads

Starter customers can now create simple yet powerful automation tasks such as sending a follow up email after getting an ad interaction from within Ad Campaign Creation and Management.



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Sales Hub™

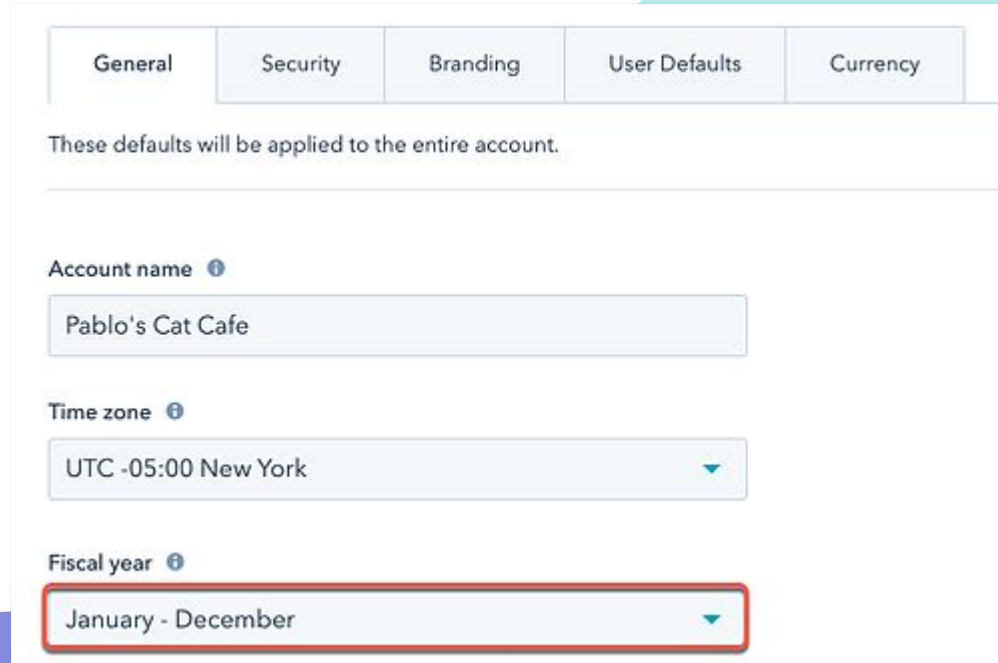


Service Hub™



Fiscal Year in Goals and Forecast

Many businesses run on a fiscal year. These businesses need the ability to manage goals and forecast revenue based on their fiscal year. You can now manage goals and forecast based on your fiscal year.



The screenshot shows the 'General' tab of an account settings page. At the top, there are five tabs: 'General', 'Security', 'Branding', 'User Defaults', and 'Currency'. Below the tabs, a message states: 'These defaults will be applied to the entire account.' The form contains three main sections:

- Account name**: A text input field containing 'Pablo's Cat Cafe'.
- Time zone**: A dropdown menu showing 'UTC -05:00 New York'.
- Fiscal year**: A dropdown menu showing 'January - December', which is highlighted with a red border.

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View and share Meeting Links on the HubSpot Mobile App

You can now view and share your Meeting Links from the HubSpot Mobile app.

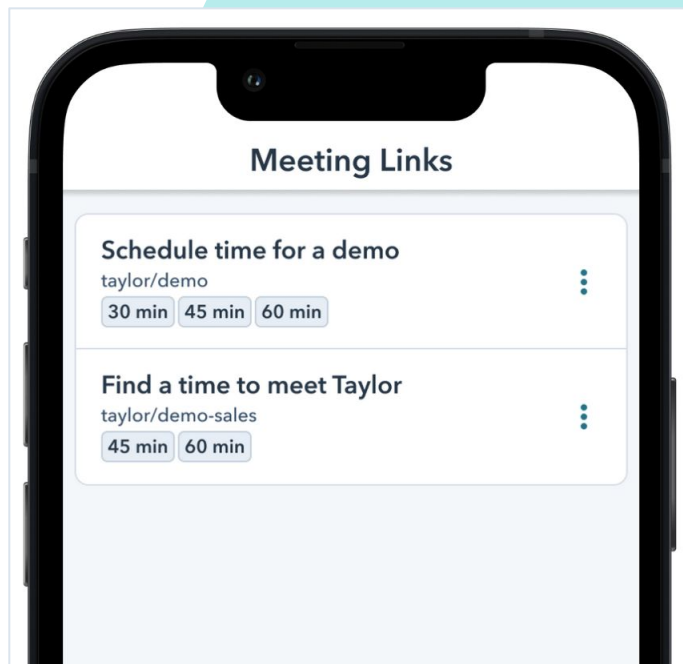
Being able to easily find and share your meeting link was one of the most requested features in the mobile app.

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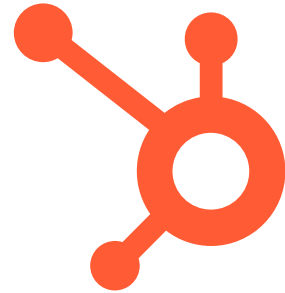


Sales Hub™



Service Hub™

HubSpot CRM Platform



Configure associations when a record is created

You can now set associations as visible or required when a standard object record is created.

Both standard objects and custom object associations are supported.

This feature is not reflected in the Mobile experience yet.

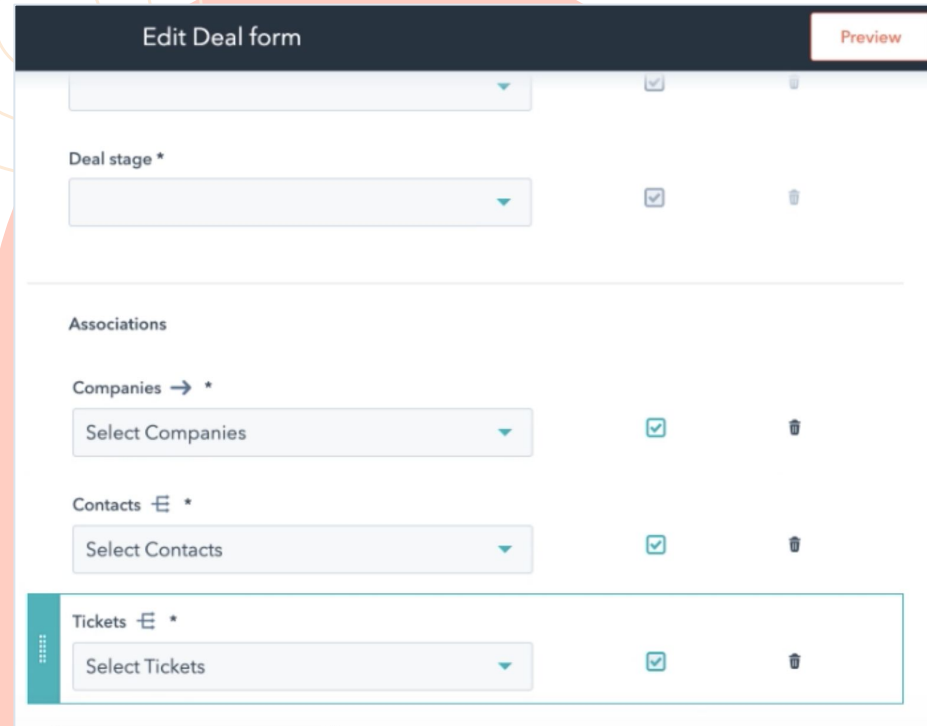
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The screenshot displays the 'Edit Deal form' interface. At the top right, there is a 'Preview' button. Below the header, there are two rows of configuration options, each with a dropdown menu, a checkbox, and a trash icon. The first row is for 'Deal stage *'. The second row is for 'Associations', which includes three sub-sections: 'Companies → *' with a 'Select Companies' dropdown, 'Contacts ⇄ *' with a 'Select Contacts' dropdown, and 'Tickets ⇄ *' with a 'Select Tickets' dropdown. Each of these sub-sections has a checked checkbox and a trash icon.

New Lists Navigation & Details Side Panel

You can now click on a specific list and be able to see two tabs:

1. Filters - this tab shows the filters of their list and its members.
2. Performance - this tab shows three reports that provide list insights.

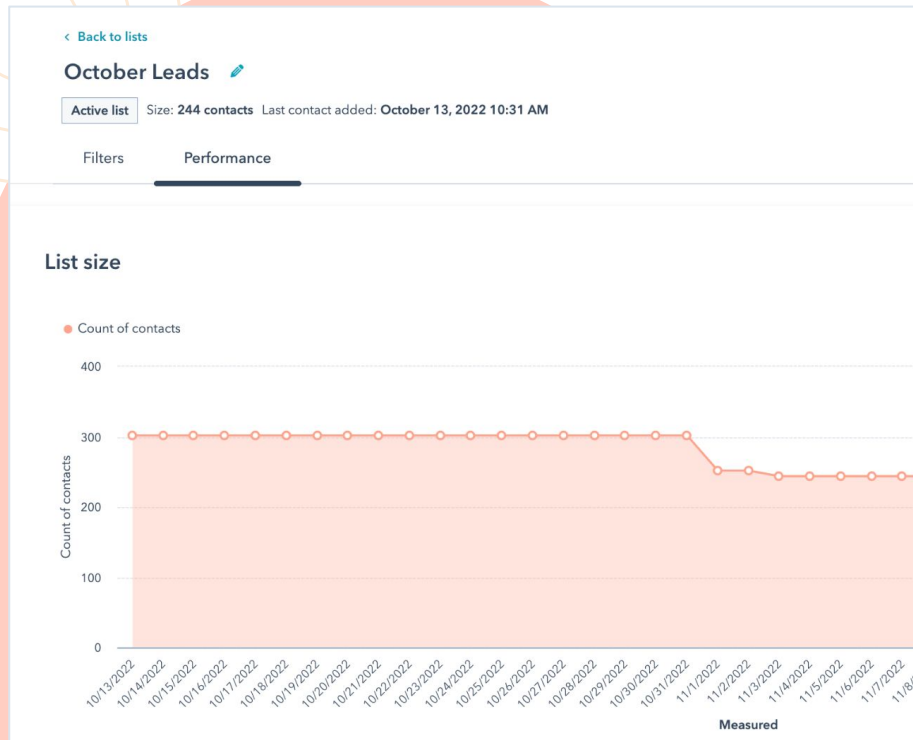
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Thread Toolbar and Preview Cards in Conversations

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

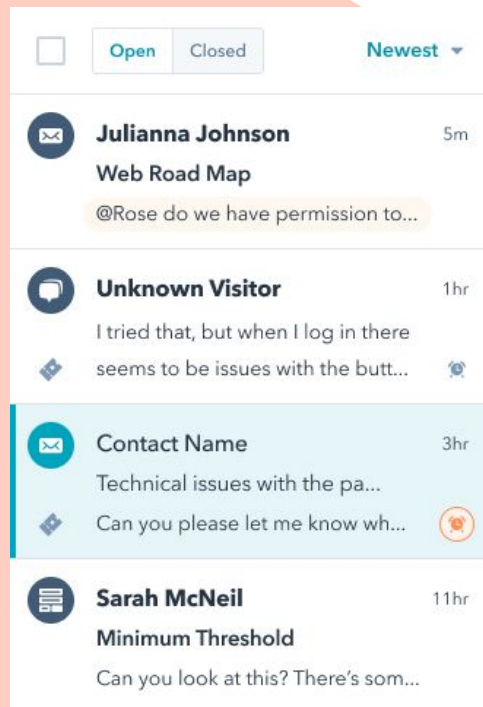
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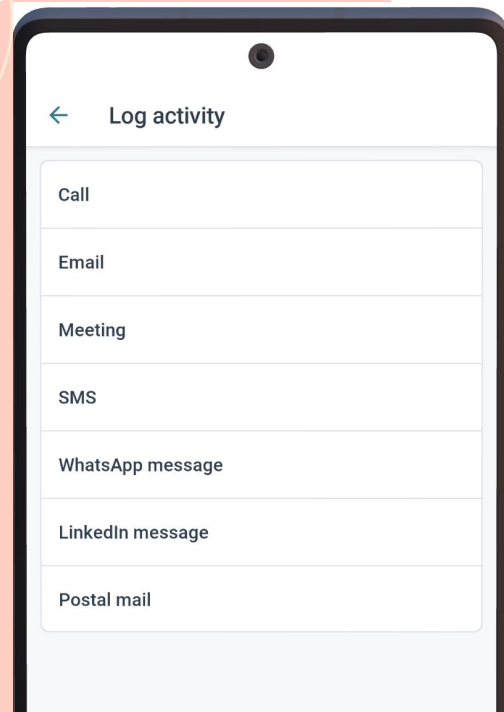
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New Logged Activity Options on the Android app

You can now manually log that you sent an SMS, LinkedIn message, WhatsApp message, or postal mail on the HubSpot Android app. This functionality was released on web earlier this year.



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Thanks for joining! See you
next month.

