

# HubSpot Product Update January 2023

## **Product update of the month**

- Add Users as attendees to meetings
- Add Line Items when Creating Deals in Workflows

## **Marketing Hub**

- Social Monitoring on Mobile
- Publish Instagram Carousel posts
- Email Editor collaboration sidebar

## **Sales & Service Hub**

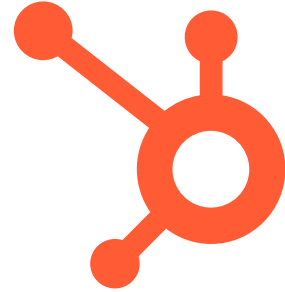
- Limit editing access to select pipeline stages
- Clone meetings scheduling pages

- Ticket List View on iOS

## **HubSpot CRM Platform**

- CRM Record Overview Tab
- See when each member joined a list
- Inline Editing for Index Pages
- New Logged Activity Options
- All 'Saved Views' Management Page
- 'View' Permissions for Note Activity
- Descriptions for every Workflow
- [Live] Max File Size Upload Limit

# Product Update of the Month



# Add Users as attendees to meetings

Now you can include other HubSpot Users, not just Contacts, as attendees when scheduling a meeting from a record in the CRM.

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Pro

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Live

Schedule

Organizer Thanapon orachorn <thanapon@ourgreen.co.th>

Title

Date21/11/2022

Start time16:15

End time16:30

Attendees3 attendees

Meeting type

Select meeting type

Location

Select location

Attendee description

Send a description to your attendees

B I U T X

More

Save

☒ Add to Google Calendar

Search users and contacts

☒ Thanapon orachorn<thanapon@ourgreen.co.th>

**Contacts**

☒ Suriyon Nontarak<tar160@gmail.com>

☒ ~●Gusmini●~42👤<u6611f15da39e79e676cb5ef9e>



Sales Hub™



Service Hub™

# Add Line Items when Creating Deals in Workflows

With this new update, you can now add line items to the deals you're creating in automation, cutting out those manual tasks so you can spend more time on things that matter and bringing you closer to managing your full sales process in HubSpot.

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<

Create record

×

the deal ⓘ

☐ Tickets associated to the enrolled contact

☐ Quotes associated to the enrolled contact  
Quotes can only be associated to one deal. All quotes from the enrolled contact will be removed from the existing deal and associated to this new deal. This can't be undone.

☐ Customer Contracts associated to the enrolled contact

☐ Customer evaluates associated to the enrolled contact

☐ leads evaluates associated to the enrolled contact

☐ Referral Partners associated to the enrolled contact

Add line item

Quantity

HubSpot CRM Consultati... ▾

1

Set up Twilio SMS ▾

1

HubSpot CRM Consultati... ▾

1

🗑

+ Add line item

Save

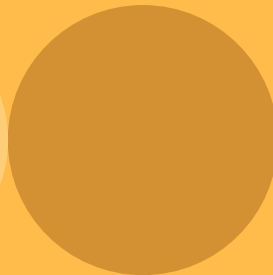
Cancel



**Marketing Hub™**



**CMS Hub®**



# Social Monitoring on Mobile

Marketers can now view how the posts they have published from HubSpot are performing from their phones (iOS and Android).

This will allow marketers to: on one side, visualise the metrics of their published posts. On the other, deep dive into the reactions to gather more curated feedback.

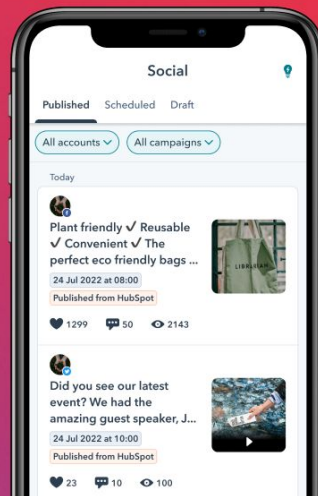
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Marketing Hub™

# Publish Instagram Carousel posts

You can now publish Instagram Carousel posts within our new Social Composer.

An Instagram Carousel gives you the ability to share a mix of up to 10 photos or videos as a single carousel post.

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## Select accounts

Choose the accounts you're posting from

## Create your posts

Draft

What do you want to say to your network?



f 2500 p 2200 t 280 in 3000

Add media ⓘ



Publishing options



Publish now



Schedule for later

Date



21/11/2022

Time



16:48

Choose a time from [your defaults](#) ↗

16:48



Marketing Hub™



# Email Editor collaboration sidebar

The Collaboration sidebar, including Commenting, Tasks and Calendar, is now available inside the Marketing Email editor.

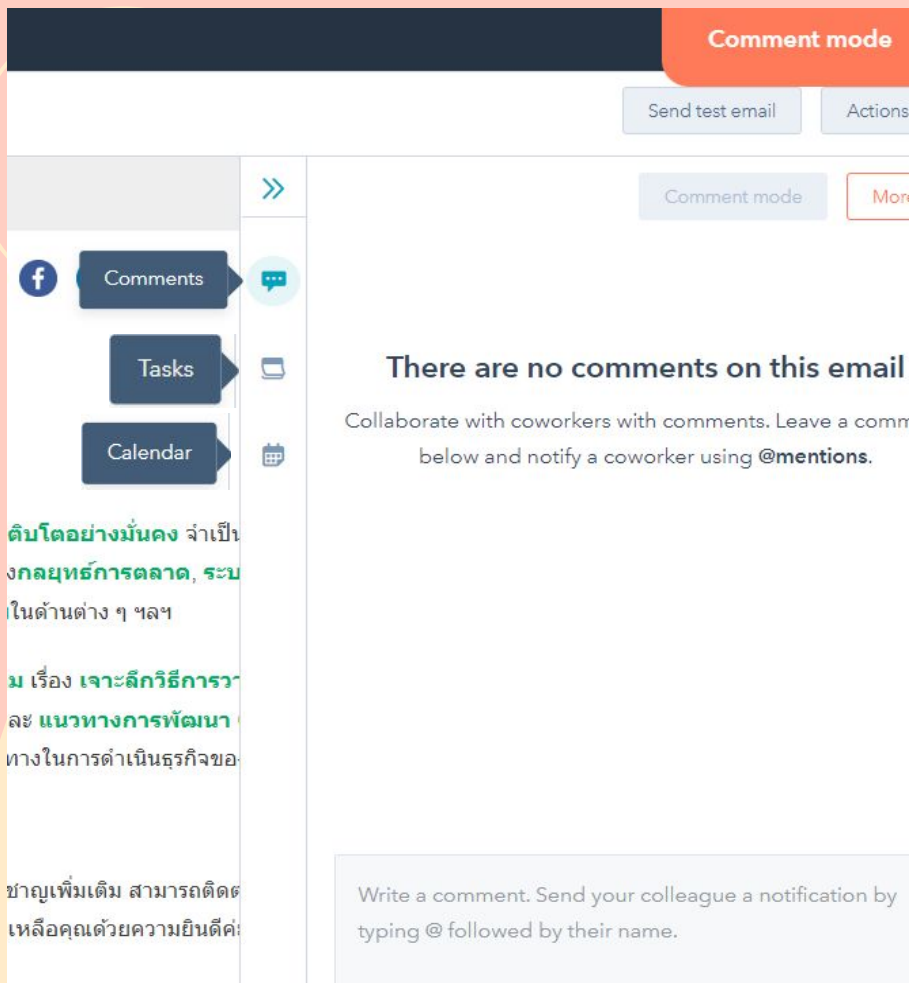
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Marketing Hub™



**Sales Hub<sup>TM</sup>**




**Service Hub<sup>TM</sup>**



# Limit editing access to select pipeline stages

Once a pipeline stage is set to "Limited to super admins," all deal records entering or already in that "locked" stage will only be editable by super admins. All other users will have read-only access to deal records in that stage (this includes moving a deal record in a "locked" stage into another stage).

STAGE NAME	DEAL PROBABILITY	EDITING ACCESS  <span>NEW</span>	UPDATE STAGE PROPERTIES
<div><div>⋮</div><div>Become Leads (SQL / R &lt;/&gt; <span>Delete</span></div></div>	10%	<div>Users with access to deals</div>	<div>Deal name *, De... <span>Edit prop</span></div>
<div><div>⋮</div><div>First Call / Get Requirements / แฉังล</div></div>	10%	<div>Limited to super admins</div> <div>Users with access to deals</div>	<div>Deal Description *, Deal Serv</div>
<div><div>⋮</div><div>Not Yet Qualify Lead</div></div>	10%	<div>Users with access to deals</div>	<div>Reason of not qualify * and Fr</div>
<div><div>⋮</div><div>Qualify lead / First Meeting / คัดงการ</div></div>	20%	<div>Users with access to deals</div>	<div>Close date *, Deal type *, Deal</div>

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# Clone meetings scheduling pages

You can now clone meetings' scheduling pages when creating new or editing existing ones.

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### Clone scheduling page

×

Internal name \* ⓘ  
60 min, 30 min, and 15 min meeting (clone)

Organizer ⓘ  
Thanapon orachorn (me) ▼

Scheduling page link \* ⓘ  
clone  
thanapon1/clone

Save Cancel



Sales Hub™



Service Hub™

# Ticket List View on iOS

iOS users can now view and create tickets from a list view.

Allowing users to organize all of their customer's tickets in one place on iOS.

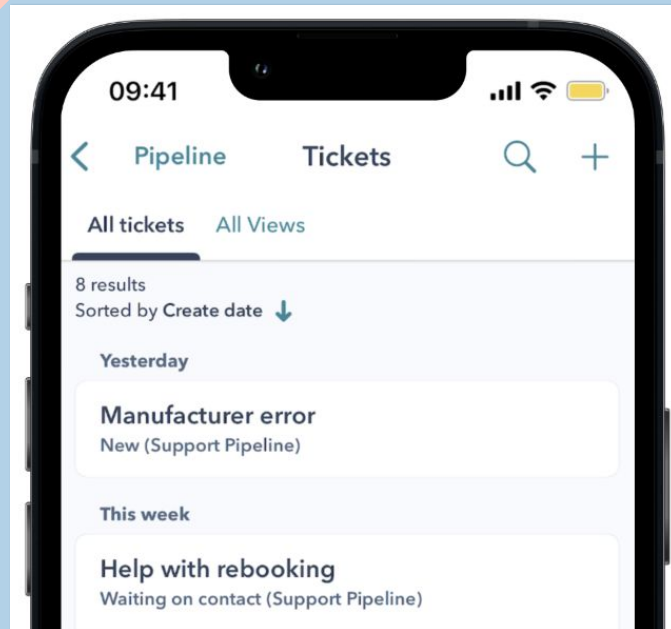
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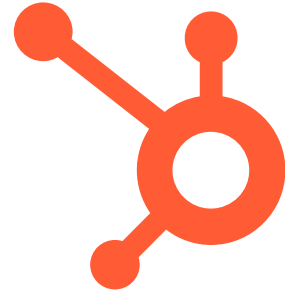
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# HubSpot CRM Platform



# CRM Record Overview Tab

Display all the relevant details of a record front and center.

Until now, you've had to search through the left sidebar, timeline, and right sidebar to gather critical information from Records.

[Video Review Overview Tab](#)

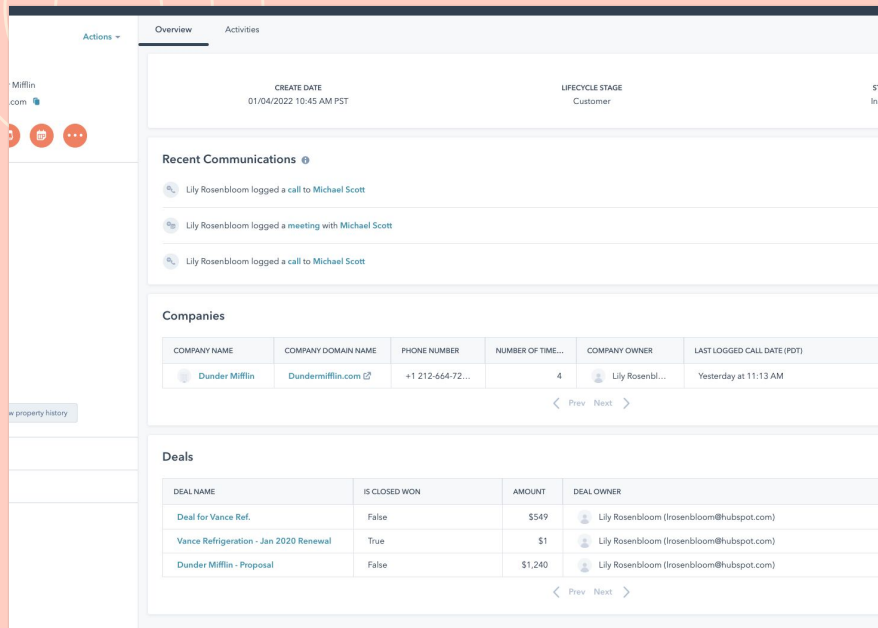
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Public Beta



The screenshot shows the HubSpot CRM interface for a record named 'Dunder Mifflin'. The 'Overview' tab is selected, displaying key information at the top: 'CREATE DATE' (01/04/2022 10:45 AM PST) and 'LIFECYCLE STAGE' (Customer). Below this, the 'Recent Communications' section lists three entries: 'Lily Rosenbloom logged a call to Michael Scott', 'Lily Rosenbloom logged a meeting with Michael Scott', and 'Lily Rosenbloom logged a call to Michael Scott'. The 'Companies' section contains a table with one entry for 'Dunder Mifflin'. The 'Deals' section contains a table with three entries: 'Deal for Vance Ref.', 'Vance Refrigeration - Jan 2020 Renewal', and 'Dunder Mifflin - Proposal'.

COMPANY NAME	COMPANY DOMAIN NAME	PHONE NUMBER	NUMBER OF TIME...	COMPANY OWNER	LAST LOGGED CALL DATE (PDT)
Dunder Mifflin	Dundermifflin.com	+1 212-664-72...	4	Lily Rosenbl...	Yesterday at 11:13 AM

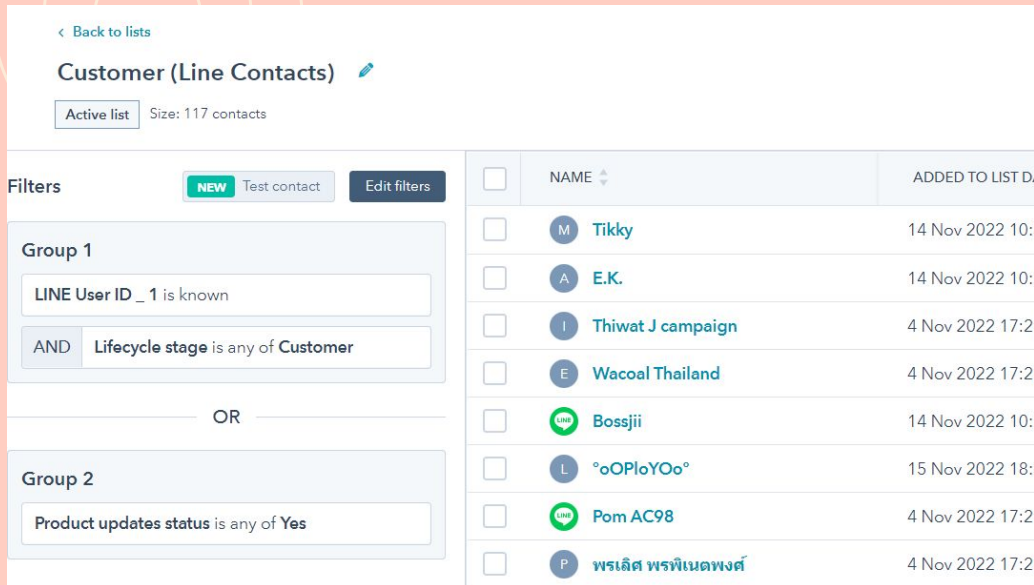
  

DEAL NAME	IS CLOSED WON	AMOUNT	DEAL OWNER
Deal for Vance Ref.	False	\$549	Lily Rosenbloom (rosenbloom@hubspot.com)
Vance Refrigeration - Jan 2020 Renewal	True	\$1	Lily Rosenbloom (rosenbloom@hubspot.com)
Dunder Mifflin - Proposal	False	\$1,240	Lily Rosenbloom (rosenbloom@hubspot.com)

# See when each member joined a list

You can now see the timestamp of when each individual member of a list joined.

Understanding when a contact or company joined a list can help you manage your customer segments better.



The screenshot shows the HubSpot interface for a list named "Customer (Line Contacts)". It includes a "Filters" section with two groups of filters, a "NEW Test contact" button, and an "Edit filters" button. The main table displays a list of contacts with columns for selection, name, and the date they were added to the list.

	NAME	ADDED TO LIST D
<input type="checkbox"/>	M Tikky	14 Nov 2022 10:
<input type="checkbox"/>	A E.K.	14 Nov 2022 10:
<input type="checkbox"/>	I Thiwat J campaign	4 Nov 2022 17:2
<input type="checkbox"/>	E Wacoal Thailand	4 Nov 2022 17:2
<input type="checkbox"/>	LINE Bossjii	14 Nov 2022 10:
<input type="checkbox"/>	L °oOPloYOo°	15 Nov 2022 18:
<input type="checkbox"/>	LINE Pom AC98	4 Nov 2022 17:2
<input type="checkbox"/>	P พรเลิศ พรทีเนตพงศ์	4 Nov 2022 17:2

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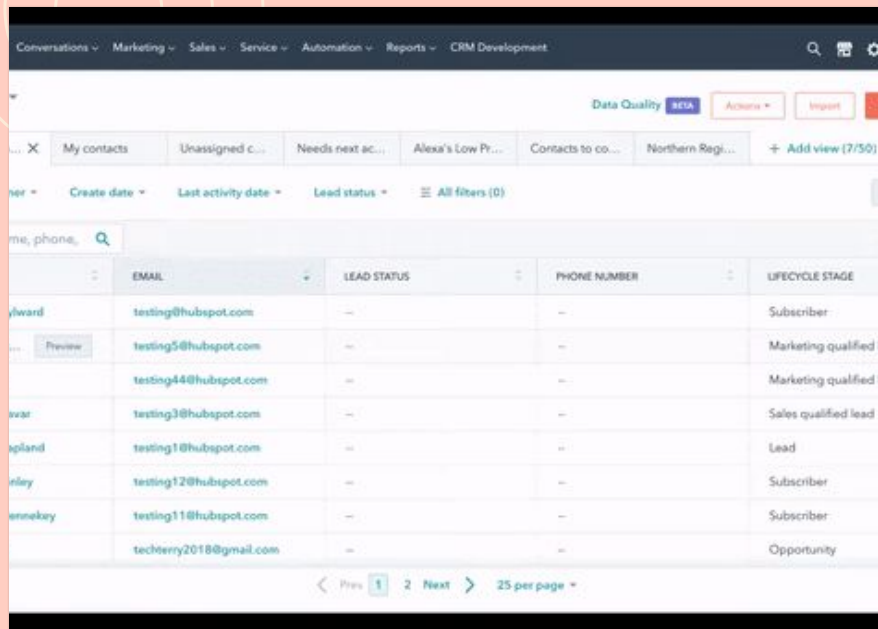
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# Inline Editing for Index Pages

You can now edit property values  
directly from the index (object) table.



The screenshot displays the HubSpot CRM interface. At the top, there's a navigation bar with tabs for Conversations, Marketing, Sales, Service, Automation, Reports, and CRM Development. Below this, a search bar and a 'Data Quality' button are visible. The main content area shows a table of contacts. The table has columns for EMAIL, LEAD STATUS, PHONE NUMBER, and LIFECYCLE STAGE. Each row represents a contact, and the 'LEAD STATUS' column is highlighted in blue, indicating it's the active column for editing. The table is filtered by 'My contacts' and shows 7/50 results. The bottom of the table has pagination controls showing '1' of 2 pages and '25 per page'.

	EMAIL	LEAD STATUS	PHONE NUMBER	LIFECYCLE STAGE
ylward	testing@hubspot.com	---	---	Subscriber
Preview	testing5@hubspot.com	---	---	Marketing qualified le
	testing44@hubspot.com	---	---	Marketing qualified le
avar	testing3@hubspot.com	---	---	Sales qualified lead
apiland	testing1@hubspot.com	---	---	Lead
nley	testing12@hubspot.com	---	---	Subscriber
annekey	testing11@hubspot.com	---	---	Subscriber
	techerry2018@gmail.com	---	---	Opportunity

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Public Beta

# New Logged Activity Options

Manually log that you sent an SMS, LinkedIn message, WhatsApp message, or postal mail on your CRM records.

Configure which activity buttons appear in the record highlight card and reorder them for quicker access.

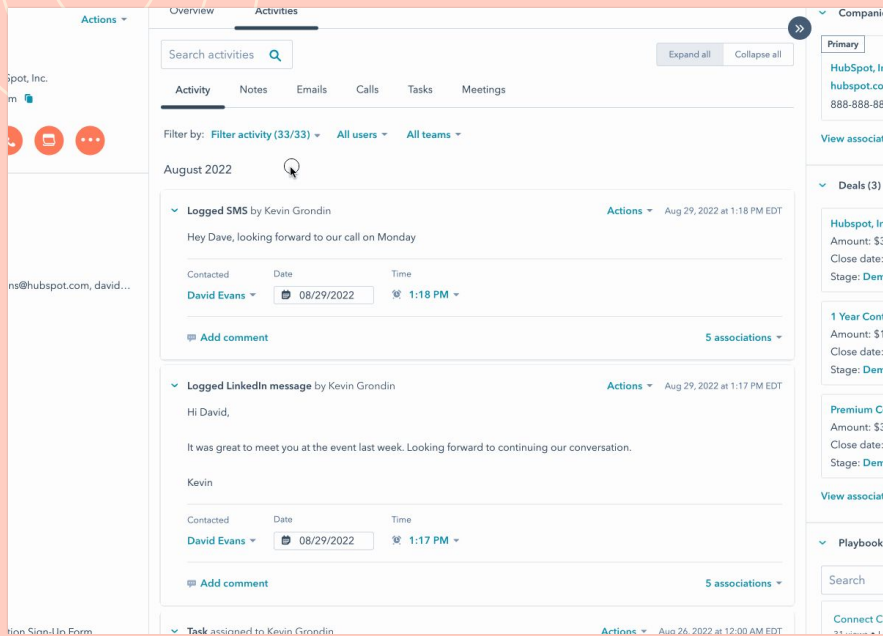
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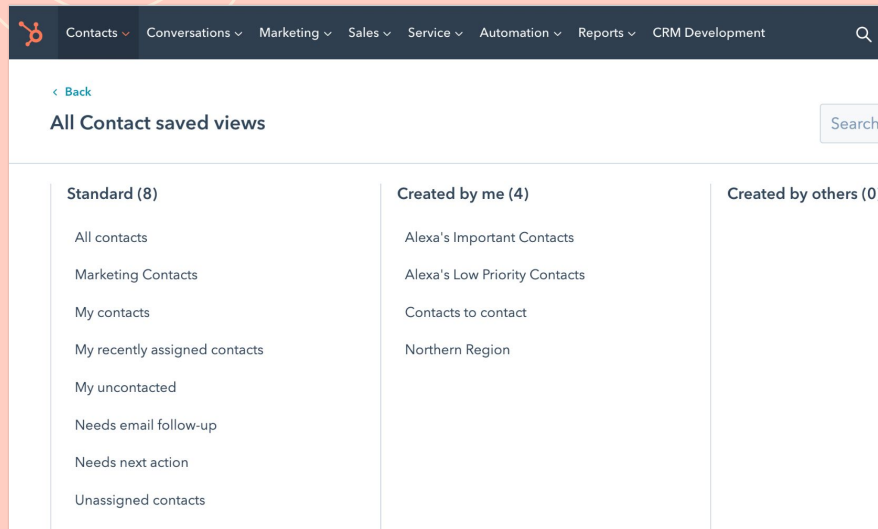
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# All 'Saved Views' Management Page

Users now have an overview page that shows all your account's saved views in one convenient place, alongside relevant meta-data (e.g. view owner, sharing settings, and more).



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# ‘View’ Permissions for Note Activity

Admins can now control which Notes their users and teams have access to view.

This will ensure relevant prospect and customer data can be saved to HubSpot CRM without compromising sensitive information.

Free Starter Pro Ent Public Beta

The screenshot shows the 'View' permissions configuration for 'Note Activity' in HubSpot CRM. The interface is a table with columns for 'View', 'Edit', and 'Delete'. The rows represent different CRM entities: Contacts, Companies, Deals, Tickets, Tasks, Notes, and Custom Objects. The 'Notes' row is highlighted with an orange border, and a dropdown menu is open for its 'View' column, showing options: 'Owned only', 'Unassigned', 'Everything', 'Team only', and 'Owned only'. The 'Custom Objects' row has 'Everything' selected for 'View', 'Edit', and 'Delete'. At the bottom, there are 'Cancel' and 'Save' buttons.

	View	Edit	Delete
Contacts 	Everything ▾	Everything ▾	Everything ▾
Companies <span>NEW</span>	Everything ▾	Everything ▾	Everything ▾
Deals	Everything ▾	Everything ▾	Everything ▾
Tickets	Everything ▾	Everything ▾	Everything ▾
Tasks	Everything ▾	Everything ▾	
Notes <span>NEW</span>	<div>Owned only ▾ <input type="checkbox"/> Unassigned Everything Team only Owned only</div>		
Custom Objects	Everything ▾	Everything ▾	Everything ▾

> CRM tools

Cancel Save

# Descriptions for every Workflow

Users can now add Descriptions to **every** type of workflow, not just Contact workflows.

Descriptions can be added while creating or editing the workflow Name.

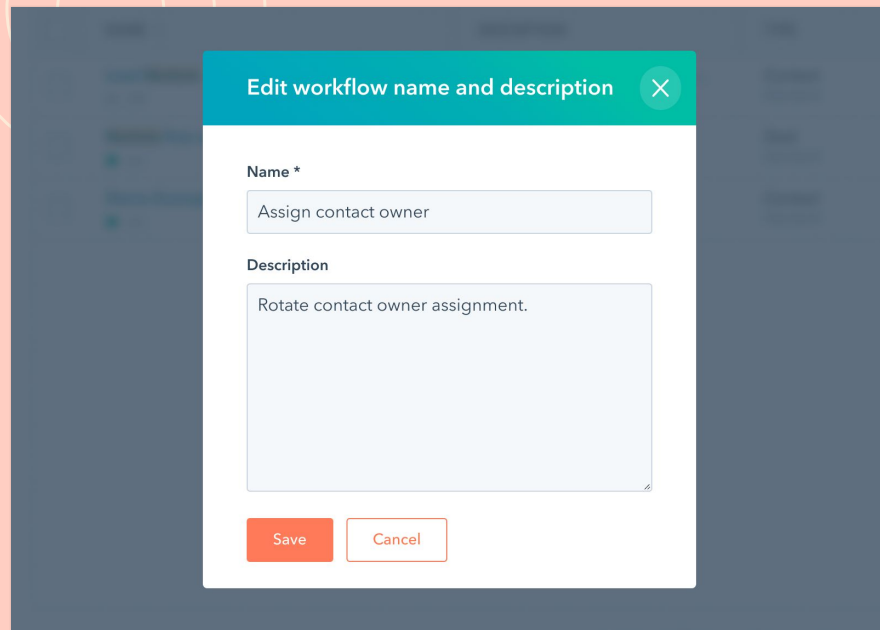
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Edit workflow name and description

Name \*

Assign contact owner

Description

Rotate contact owner assignment.

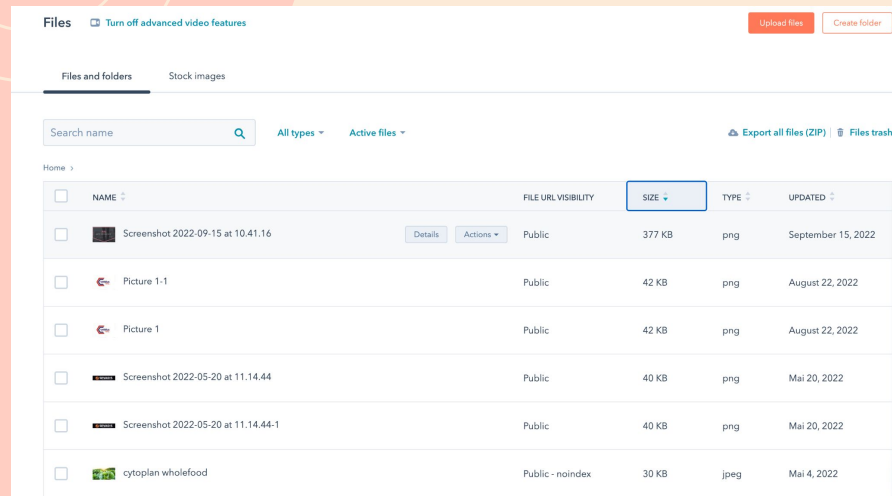
Save Cancel

The background features a light orange gradient. On the left, there is a large, solid orange rounded rectangle. In the upper right, a light pink semi-circle is partially visible. Below the main text area, there is a solid light pink rectangular block.







# Other Updates

# [Live] Max File Size Upload Limit

Adding a limit to each file uploaded to the Files tool by customers. The limit will be at 20Mb for Free tiers, and 2GB for paid tiers. When a customer uploads a file to HubSpot (through the Files tool or through the File Picker in content editors), the size limit will be enforced (both for UI and API uploads).



The screenshot shows the HubSpot Files tool interface. At the top, there's a header with 'Files' and a toggle for 'Turn off advanced video features'. Below this are tabs for 'Files and folders' (selected) and 'Stock images'. A search bar and filters for 'All types' and 'Active files' are present. On the right, there are buttons for 'Upload files' and 'Create folder'. The main area displays a table of files with columns for selection, name, file URL visibility, size, type, and updated date. The 'SIZE' column is highlighted with a blue border.

<input type="checkbox"/>	NAME	FILE URL VISIBILITY	SIZE	TYPE	UPDATED
<input type="checkbox"/>	 Screenshot 2022-09-15 at 10:41:16	Public	377 KB	png	September 15, 2022
<input type="checkbox"/>	 Picture 1-1	Public	42 KB	png	August 22, 2022
<input type="checkbox"/>	 Picture 1	Public	42 KB	png	August 22, 2022
<input type="checkbox"/>	 Screenshot 2022-05-20 at 11:14:44	Public	40 KB	png	Mai 20, 2022
<input type="checkbox"/>	 Screenshot 2022-05-20 at 11:14:44-1	Public	40 KB	png	Mai 20, 2022
<input type="checkbox"/>	 cytoplasm wholefood	Public - noindex	30 KB	jpeg	Mai 4, 2022