HubSpot Product Update January 2023

OURGREENFISH
ACCELERATE YOUR TRANSFORMATION

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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

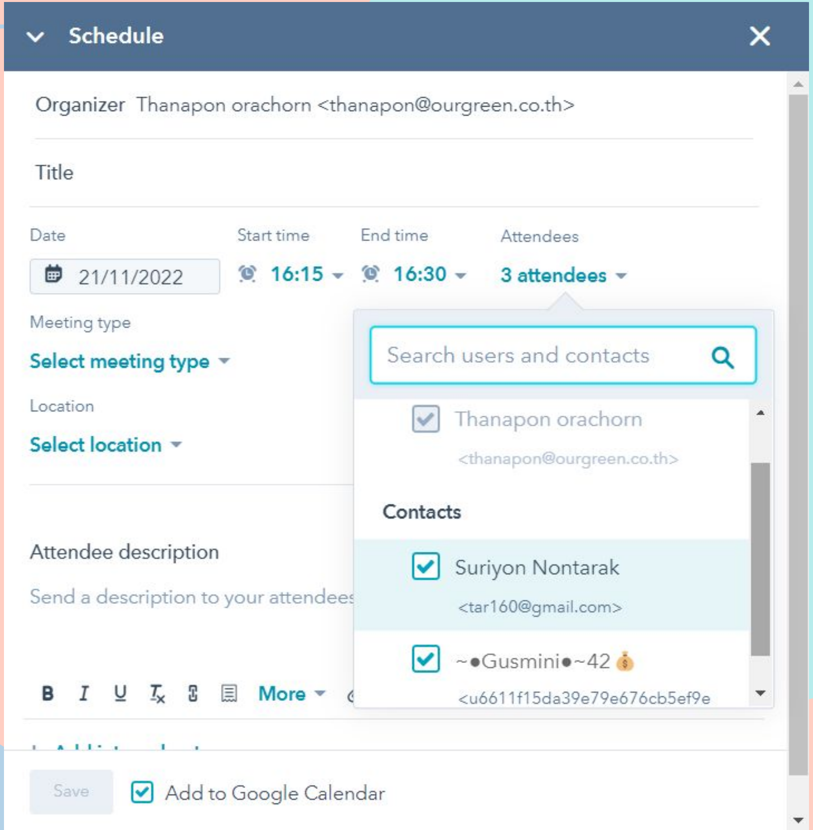
HubSpot CRM Platform

- 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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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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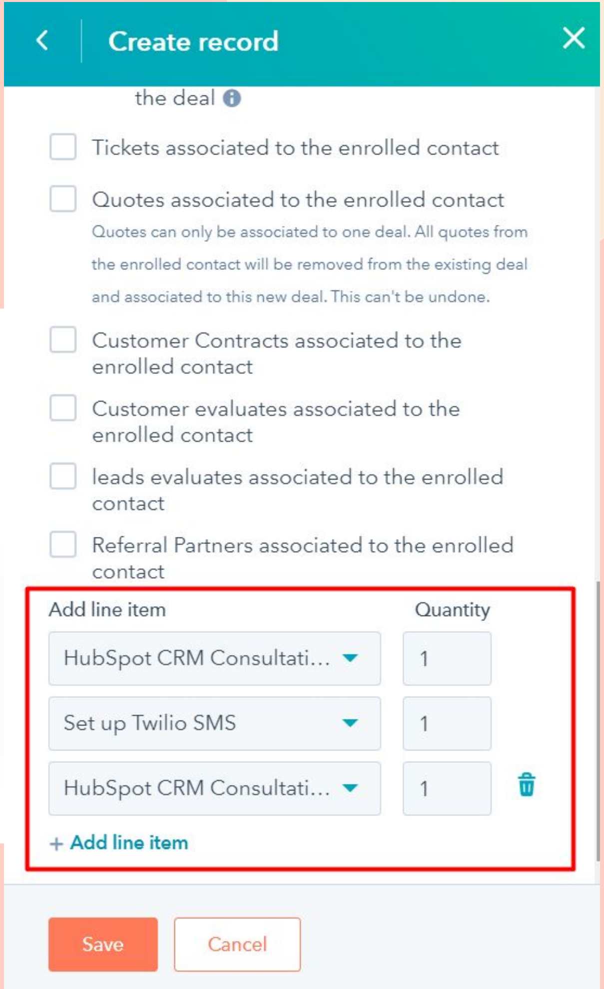

HubSpot

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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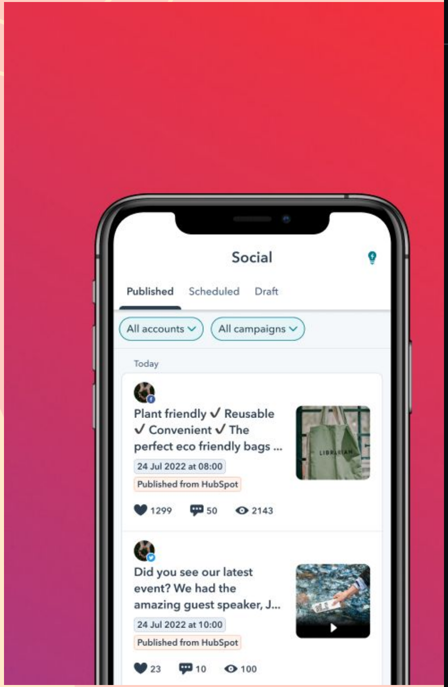

Marketing Hub™

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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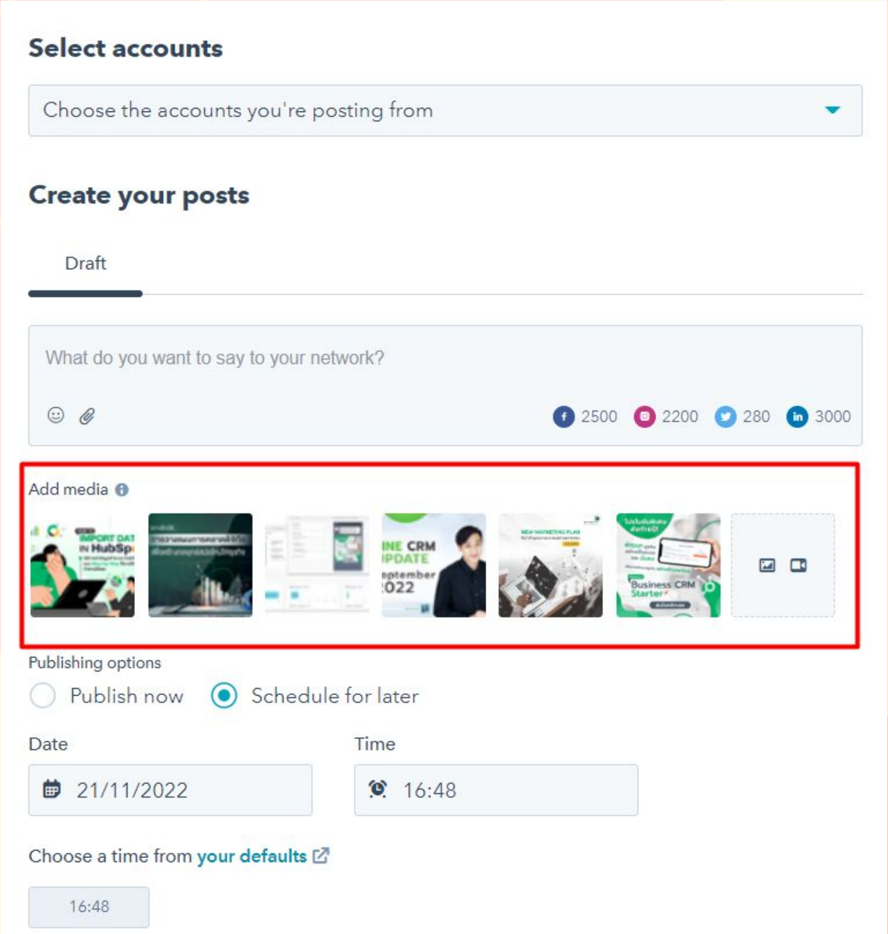
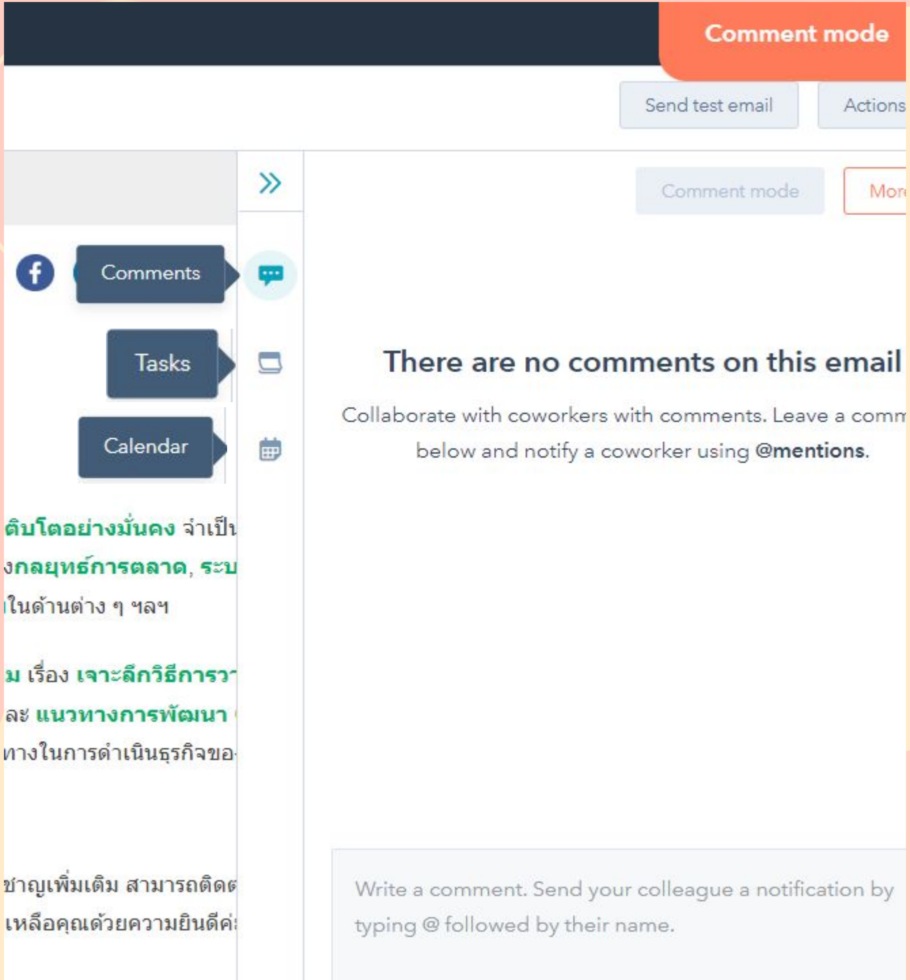


Marketing Hub™

Email Editor collaboration sidebar

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



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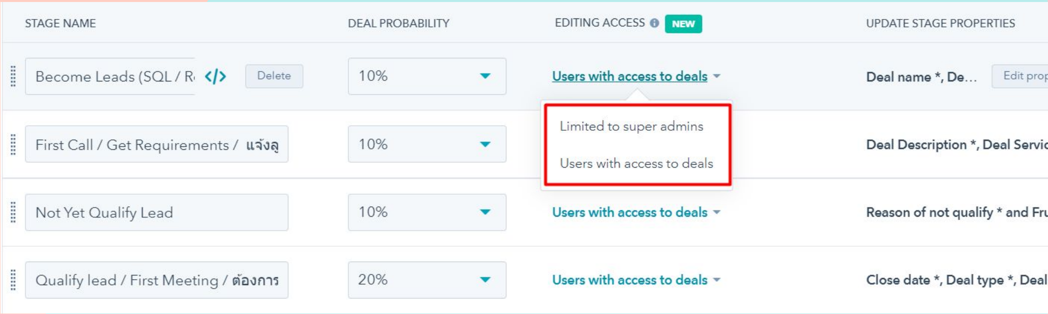
Marketing Hub™

Sales Hub™

Service Hub™

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).



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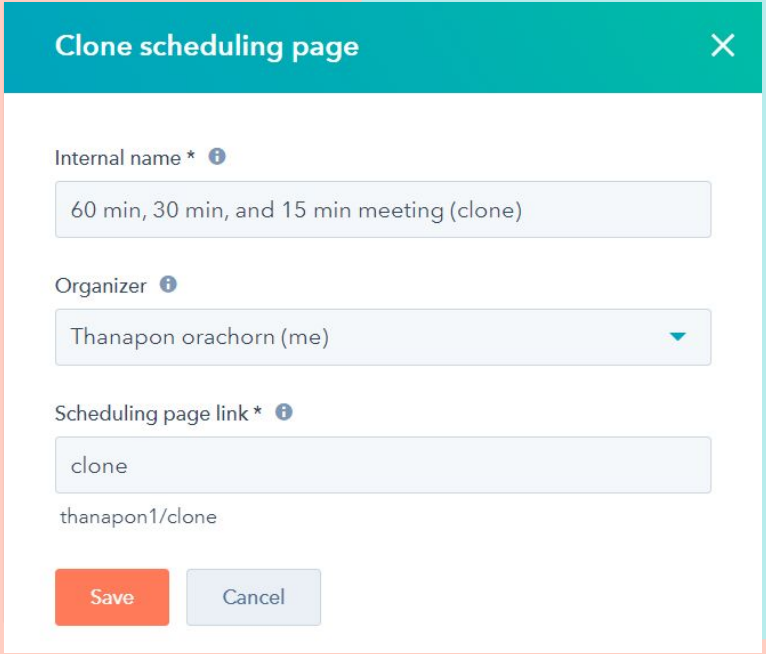
Sales Hub™

Clone meetings scheduling pages

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



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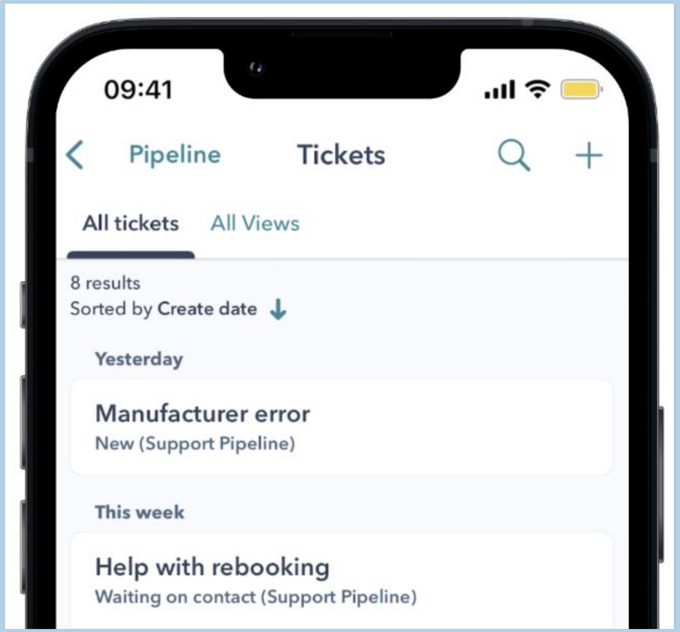
Sales Hub™ Service Hub™

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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Service Hub™

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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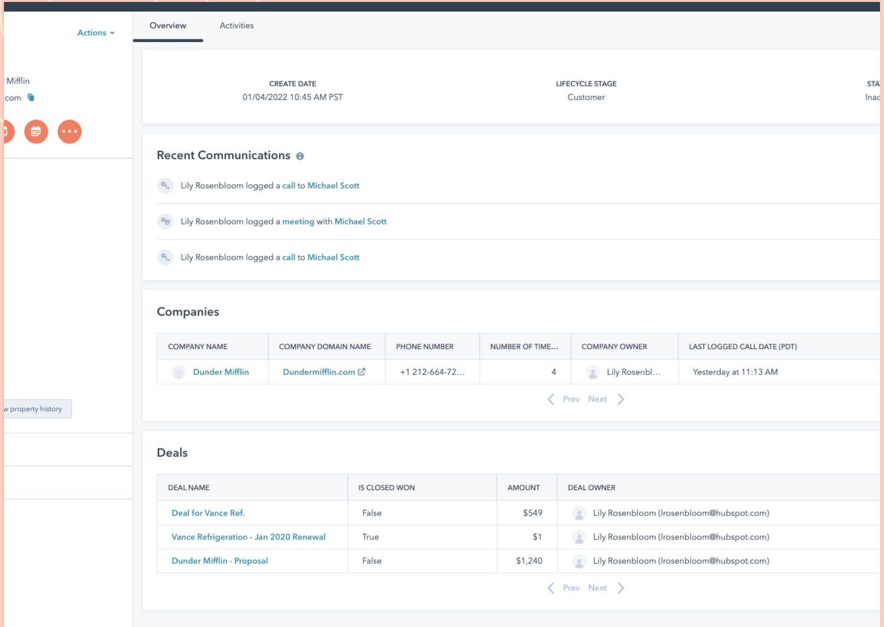
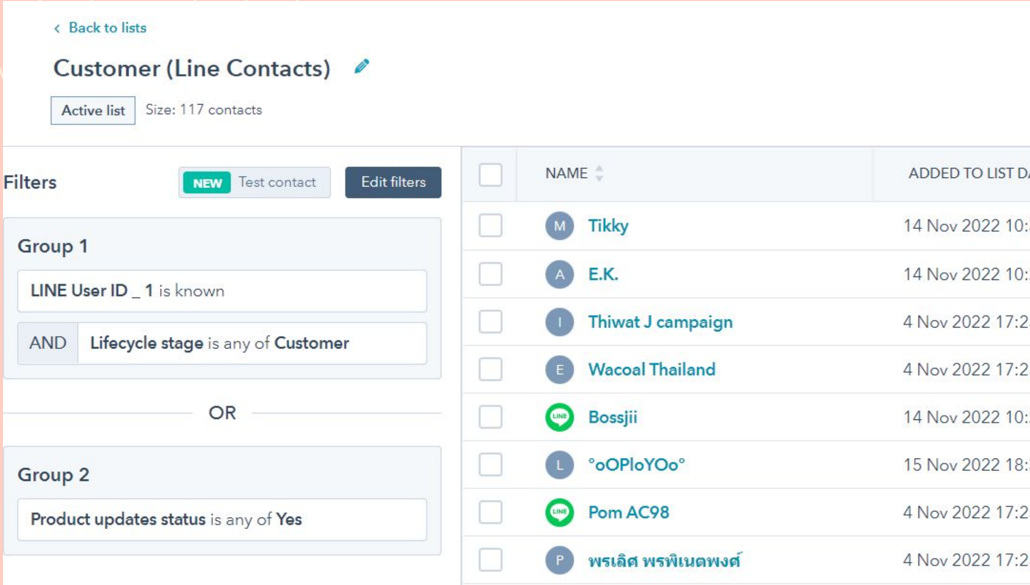


HubSpot

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.



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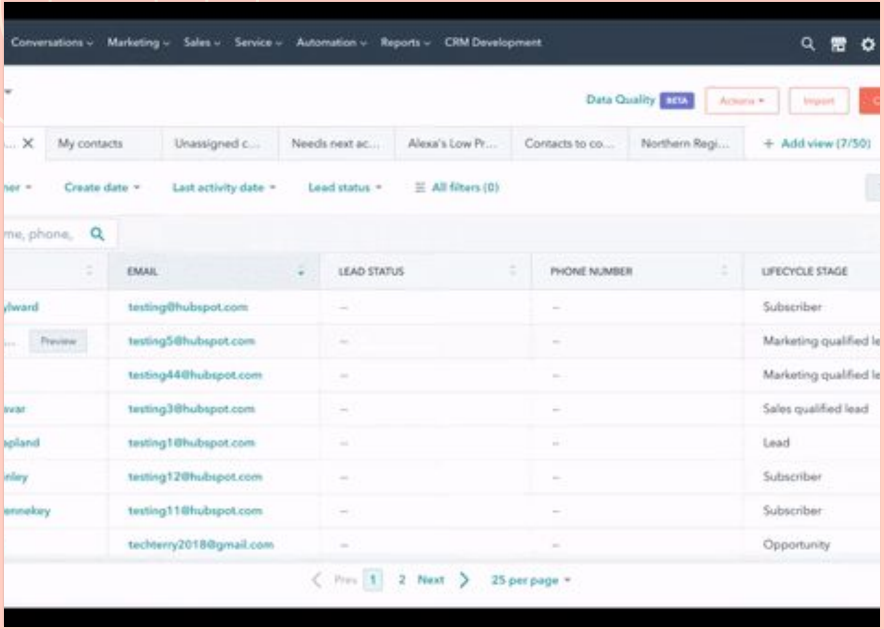
HubSpot

Inline Editing for Index Pages

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



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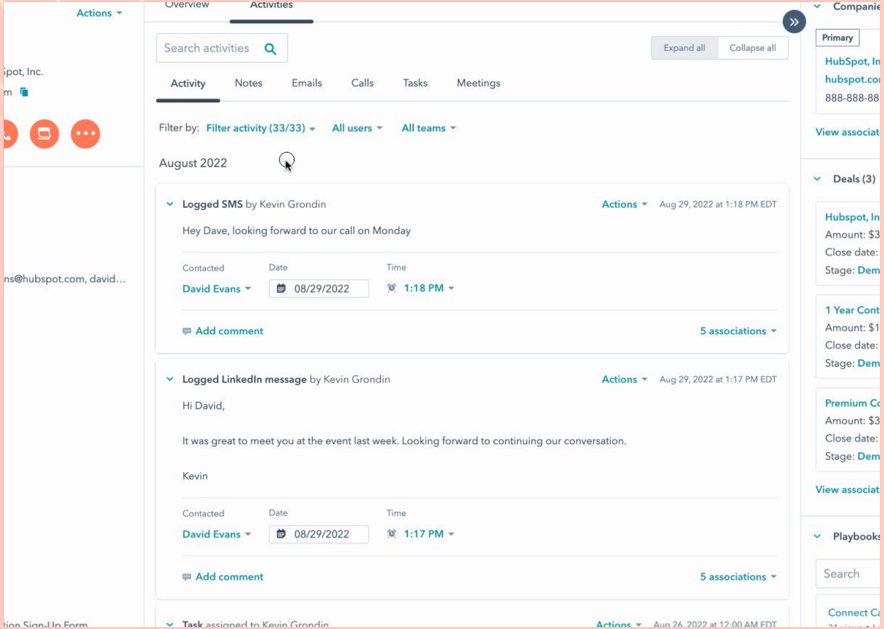
HubSpot

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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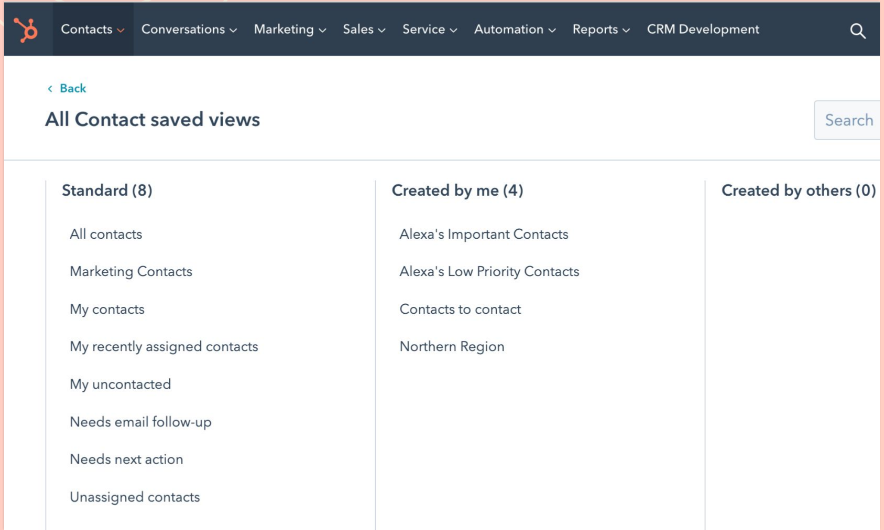
All ‘Saved Views’ Management Page

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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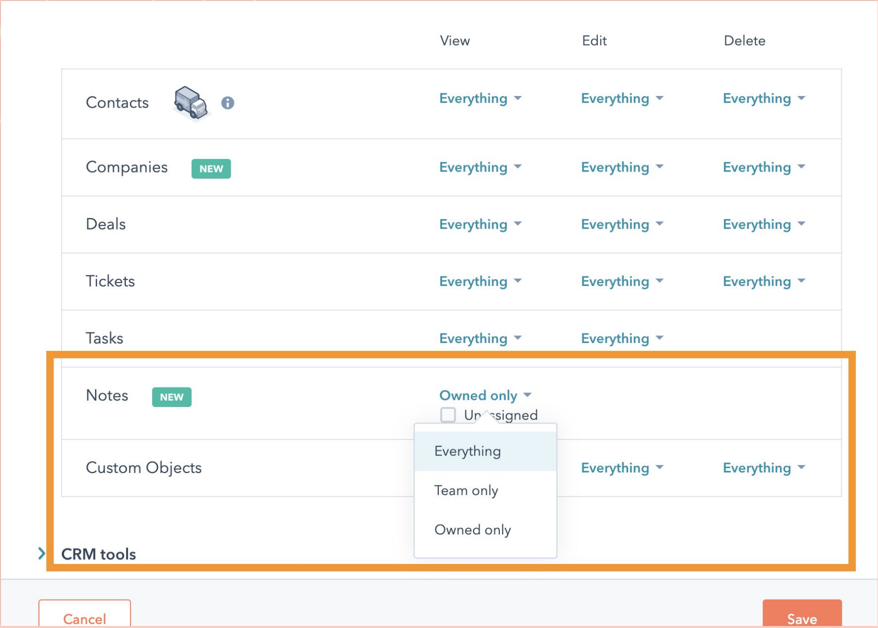
HubSpot

‘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.



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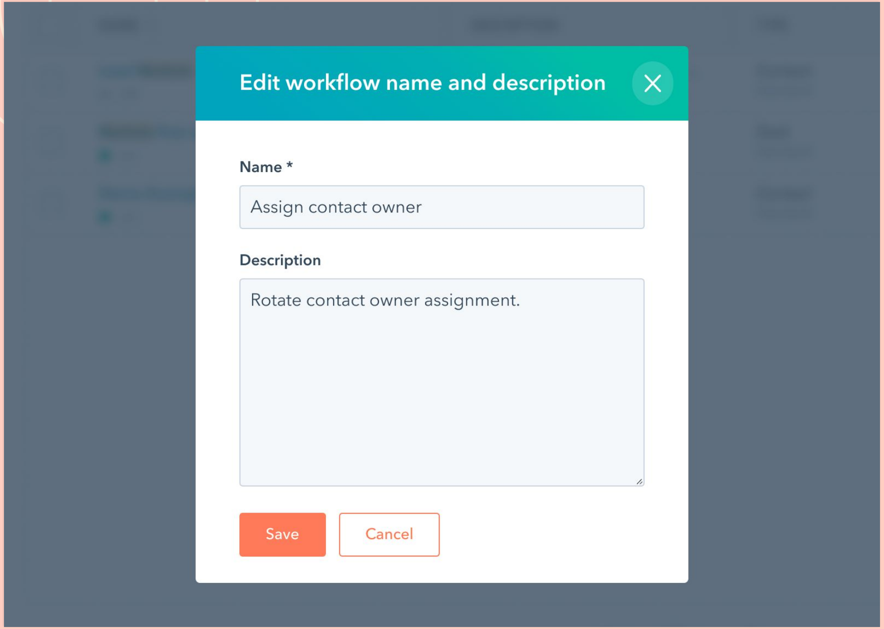
HubSpot

Descriptions for every Workflow

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

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



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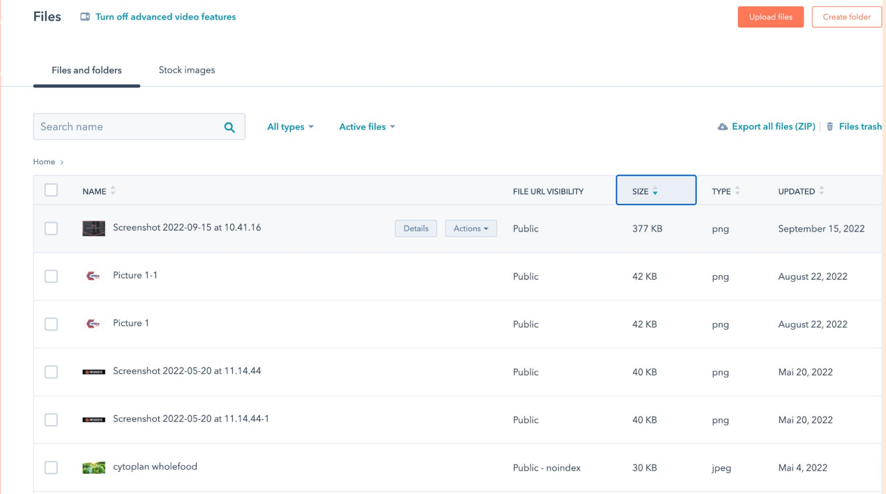
HubSpot

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).



HubSpot