



A New CRM Record is Coming from HubSpot (you can opt in)

Jan 7

The screenshot displays the HubSpot CRM interface for a contact named Barb Larp, Controller at Super Cool Industries. The left sidebar shows contact details, including first and last names, email, phone number, contact owner (Anna Kutch), last contacted date, lifecycle stage (Customer), and lead status. Below this are sections for communication subscriptions and website activity. The main content area shows a timeline of activity for December and November 2018, including ticket activity, tasks, and list memberships. The right sidebar shows a list of deals and tickets associated with the contact.

Your HubSpot records — contacts, companies, deals, and tickets — are the backbone of your HubSpot account. They tie every other tool together, constantly absorbing new information about your prospects and helping you put that information to use to provide better experiences for your customers.

The power of records in HubSpot is the amount of context they provide. In a single profile, you can see a slew of things: important characteristics (properties), key actions and events (pageviews, email opens, sales calls, and more), associated records, workflow enrollments, list memberships, quotes, and more. Plus, you can actually interact with your customers from your records. Send an email, make a call, or book a meeting from any record in HubSpot.

While there's power in having so much context in one place, there's an inherent design challenge as well: in your HubSpot records, you need to see a ton of information. But, at the same time, it needs to be accessible and digestible (not overwhelming), and it needs to be customizable for every use case on your team. With those goals in mind, records in HubSpot have gone through several iterations over the years.

Today, we're excited to announce that the next evolution of the HubSpot record. It's more streamlined, making it easier to access all the context you need to create better customer



interactions, while maintaining its clarity and cleanliness. Plus, it's got a ton of new functionality to boot.

We'll walk you through the new record in detail below, but before we do, a few quick notes:

- You can opt into the new design using the button in the bottom-left of any record.
- You can opt out at any time and continue to use the current design.
- The opt-in is on a per-user basis in your account. In other words, opting in or out won't impact the other users on your team.

With the logistics out of the way, here's the scoop on the new record.

What's different?

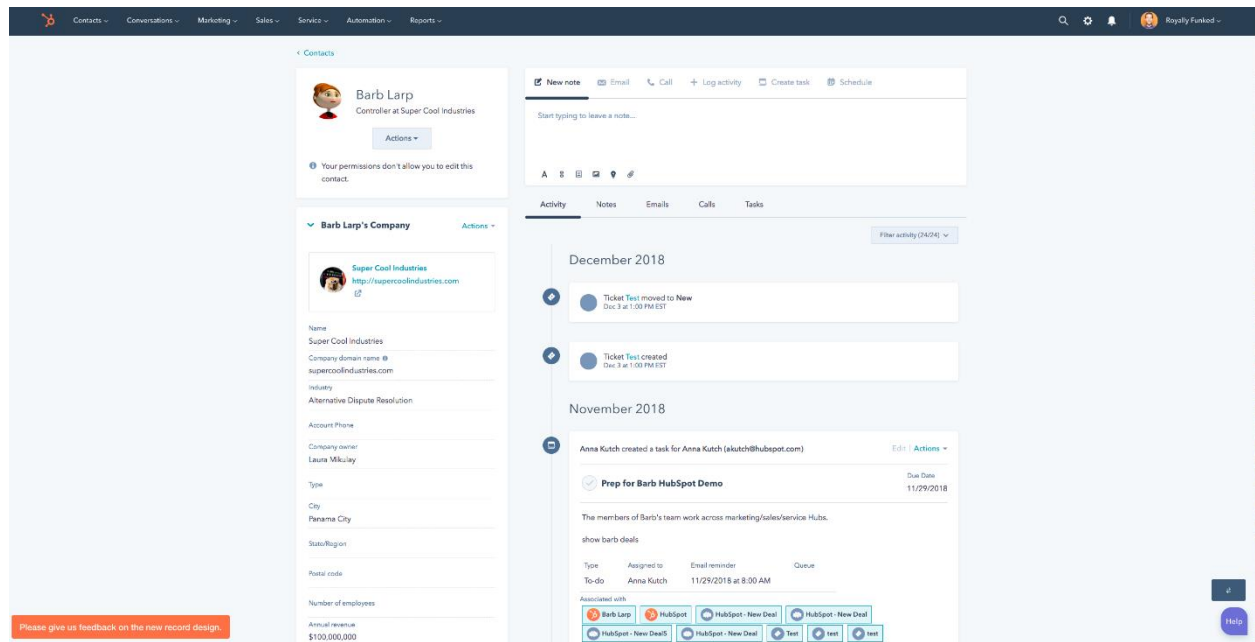
From two columns to three

Over the years, you've given us the same feedback again and again about your records: scrolling is the enemy of productivity. The more relevant information that lives above the fold, the better. With that in mind, your records have gone from a static two column layout to a responsive three column layout. The three columns allow you to instantly see way more context than before; no scrolling required. The new columns break down like this:

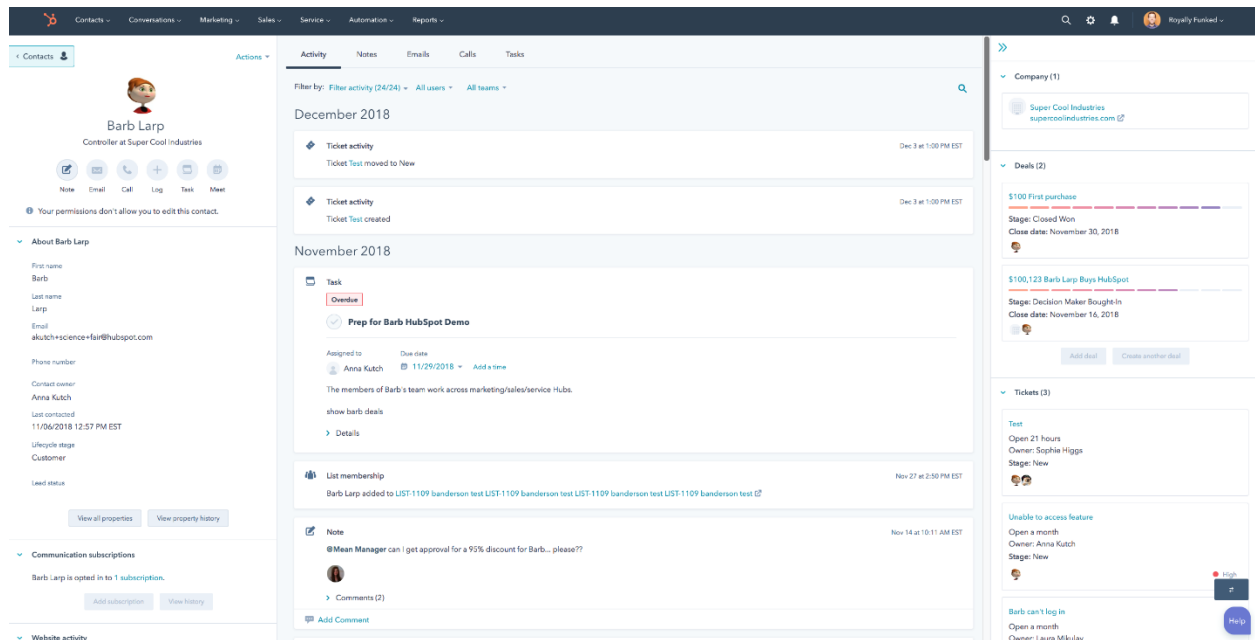
- On the left, you'll find important information about the specific record type. For example, for Contacts, you'll see the about card, communication subscription card, website activity, and predictive lead score card (if you're using Enterprise).
- In the middle, you'll see the timeline of recent activities.
- On the right, you'll see any associated records of other types (example: deals related to a certain contact).



Before:



After:



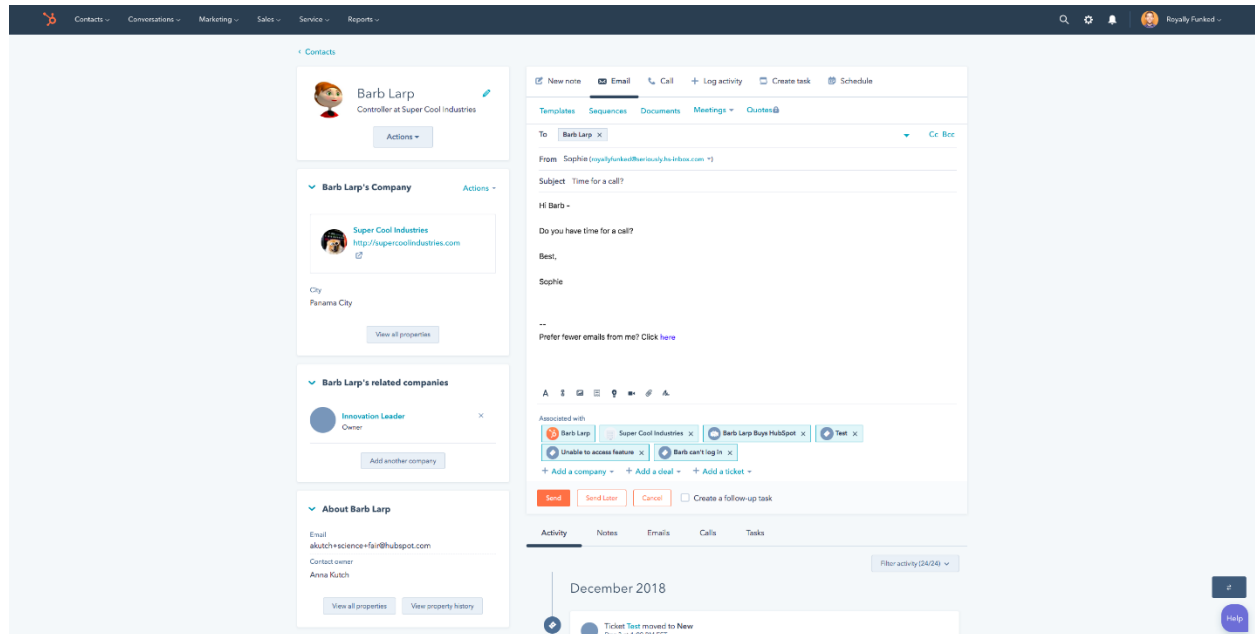
Pop up communicator

The communicator in the “old” record — where you could make calls, send emails, and all the rest — was stuck to the top of the page. If you wanted to find additional context about the record, you had to



scroll all the way down, then all the way back up. With the new design, simply click the interaction buttons in the left-hand sidebar, and a communicator pane pops up at the bottom of the screen. Just like the apps that you're used to using, like Gmail and Office365. With the new communicator design, you can view information on the record while interacting with your prospects and customers. That means less scrolling for you, and better experiences for your buyers. Win win.

Before:



After:



The screenshot shows the OctoUX interface. On the left, a sidebar for 'Barb Larp' (Controller at Super Cool Industries) includes contact info and communication subscriptions. The main area displays a timeline of activity for Barb Larp, filtered by 'Filter activity (24/24)'. The timeline shows activity for December 2018 and November 2018. Key activity includes a task 'Prep for Barb HubSpot Demo' assigned to Anna Kutch, due 11/29/2018. The right-hand panel shows details for 'Super Cool Industries' and a deal '\$100 First purchase'.

Timeline card redesign

The timeline cards have a new look. We took a hard look at the information being presented in each of the timeline cards and streamlined them. We put information that doesn't need to be accessed frequently behind a hover state and collapsed cards when appropriate. All in all, the timeline should now be easier to parse and scan. One example: task details and associations are consolidated.

Before:

The 'Before' design shows a task card for 'Prep for Barb HubSpot Demo' created by Anna Kutch. The card includes a due date of 11/29/2018, a description of the task, and a list of associated items. The associated items are displayed as a grid of buttons, each with an icon and a label.

Type	Assigned to	Email reminder	Queue
To-do	Anna Kutch	11/29/2018 at 8:00 AM	

Associated with

- Barb Larp
- HubSpot
- HubSpot - New Deal
- HubSpot - New Deal
- HubSpot - New Deal5
- HubSpot - New Deal
- Test
- test
- test



After:

Task Associated with 9 records ▾ Delete

Overdue

Prep for Barb HubSpot Demo

Assigned to

Due date

Anna Kutch ▾

11/29/2018 ▾ [Add a time](#)

The members of Barb's team work across marketing/sales/service Hubs.

Show Barb Deals and Tasks

[Details](#)

What's new?

The new record design doesn't just improve existing functionality; it adds a ton of brand new features as well.

Associated record preview

A single record doesn't always hold all the context you need in order to have an informed interaction with a customer. If you're a sales rep working a deal, you might need to dig into the details of a single contact, or the time zone of the associated company. If you're a support rep, you might need to check which products are associated to your customer's most recent deal. With the new record design, you can quickly see information about an associated record without leaving the record you're on, via a brand new preview feature. No more clicking back and forth between records.



Collapsable right sidebar

Using a smaller screen? Want to focus specifically on the activity in the timeline with a bit more breathing room? You can now collapse and expand the right sidebar and pull it up when you need it.

The screenshot displays the OctoUX interface for a contact named Barb Larp, Controller at Super Cool Industries. The left sidebar shows contact details, communication subscriptions, and website activity. The main area features a timeline of activities, including ticket creation and task assignment. The right sidebar is collapsed, showing a 'Company (1)' section with 'Super Cool Industries' and a 'Deals (2)' section with two deals. The timeline shows activities for December and November 2018, including ticket creation and task assignment.

Inline Timeline Editing and Timeline Filtering

In addition to the streamlined look, we've also introduced inline editing for activities in the timeline so you can update their notes, or change the date of a task in far less clicks.

Before:



Anna Kutch created a task for Anna Kutch (akutch@hubspot.com)

[Edit](#) | [Actions](#) ▼



Prep for Barb HubSpot Demo





Due Date
11/29/2018






The members of Barb's team work across marketing/sales/service Hubs.

Show Barb Deals and Tasks

Type	Assigned to	Email reminder	Queue
To-do	Anna Kutch	11/29/2018 at 8:00 AM	

Associated with

 Barb Larp
  HubSpot
  HubSpot - New Deal
  HubSpot - New Deal

 HubSpot - New Deal5
  HubSpot - New Deal
  Test
  test
  test



Barb Larp was added to LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test
Nov 27 at 2:50 PM EST

After:



Task

Overdue



Prep for Barb HubSpot Demo

Assigned to [Anna Kutch](#) ▼ Due date [11/29/2018](#) ▼ [Add a time](#)

The members of Barb's team work across marketing/sales/service Hubs.

Show Barb Deals and Tasks

> Details



List membership

Nov 27 at 2:50 PM EST

Barb Larp added to LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test [↗](#)



Also, you can now filter the timeline by owner and team to filter the CRM activities in the timeline to just the things you want to see - for example, just see the activities that your sales team have created vs the support team etc. We've also introduced timeline search so you can quickly find specific activities.

The screenshot displays the OctoUX CRM interface for a contact named Barb Larp, Controller at Super Cool Industries. The left sidebar contains sections for 'About Barb Larp' (email, contact owner), 'Communication subscriptions', and 'Website activity'. The main area shows a timeline of activities for December and November 2018, including ticket activities and a task 'Prep for Barb HubSpot Demo'. The right sidebar shows 'Company (1)' (Super Cool Industries), 'Deals (2)' (First purchase, Barb Larp buys HubSpot), and 'Tickets (3)'. A 'Help' button is visible in the bottom right corner.

Pop up interactions

As mentioned above, we're working to make the activity interaction pane act more similarly to the apps that you know and love already. With this change, we've also included minimize and full screen functionality.



The screenshot displays the OctoUX CRM interface. On the left, the contact profile for Barb Larp is shown, including their role as Controller at Super Cool Industries and contact information. The main area features a central activity feed with a highlighted email from Sophie (royallyfunkt@seriously.hs-inbox.com) to Barb Larp, dated November 2. A task window is also visible, showing a task assigned to Anna K. The right sidebar contains a list of companies, including Super Cool Industries, and a list of deals, such as '\$100 First purchase' and '\$100,123 Barb Larp Buys HubSpot'. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, and Reports.

As a client and subscriber to the EDO Accelerator, we're happy to set up a no-charge online training session to walk you through this update. We will send out a few times for presentations once this is released.

As a HubSpot partner, we anticipate getting the update this week so we'll have some experience with this already.

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