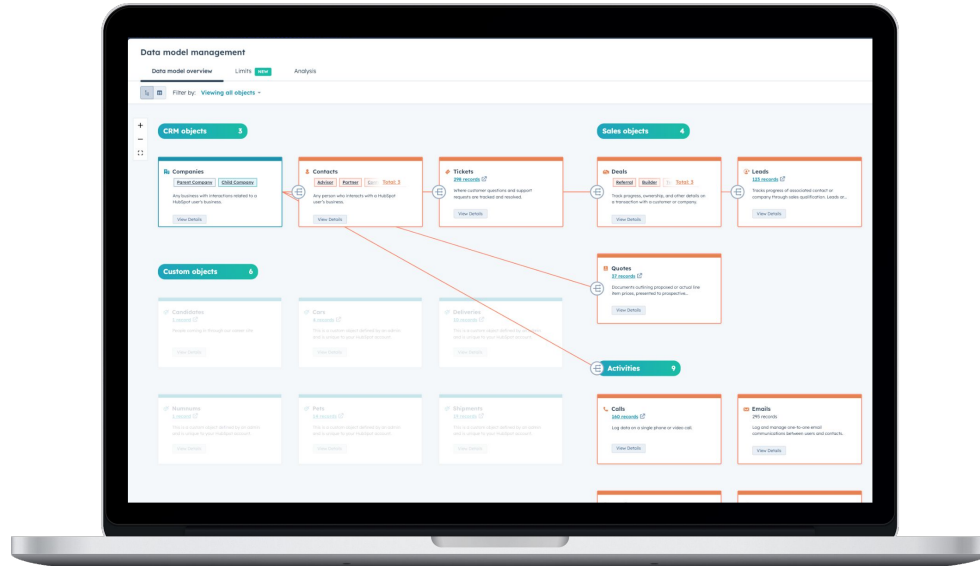


# Objects Cheat Sheet

A Crash Course in HubSpot Architecture

By: Kyle Jepson



### “How many objects are there in HubSpot?”

The answer depends entirely on what you mean by *object*.

This document takes a goal-oriented approach, meaning that it organizes HubSpot objects by what you’re trying to accomplish with them. Like if you’re wanting to filter, sort, and assign records to owners, you’ll have a different list of objects than if you’re trying to automate processes.

**To get the most out of this cheatsheet, think about what you’re trying to do and then go to the relevant section to see what objects are available to you.**



# Contents

01

---

Filter, Sort,  
and Assign

[Index Pages](#)  
[Records](#)  
[Owners](#)

02

---

Customize and  
Collect Data

[Properties](#)  
[Importing](#)  
[Forms](#)

03

---

Report  
and Analyze

[Prebuilt Reports](#)  
[Single-Object Reports](#)  
[Custom Report Builder](#)

04

---

Automate

[Workflows](#)

05

---

Integrate

[APIs](#)

[CLICK HERE FOR A SUMMARY](#)

# Filter, Sort, and Assign

# Index Pages

The CRM has standardized index pages for many objects. An index page let's you...

- Switch between index pages using the drop down in the top left
- Filter and sort by any property
- Add and remove columns
- Take bulk actions on records
- Open individual record pages
- Edit property data
- Create saved views

The screenshot shows a CRM interface with a contact list. The table has the following columns: NAME, EMAIL, INDUSTRY (FROM COMPANY), CONTACT -- CONTACTS, CONTACT UNWORKED, ENGO DOWN SELECT, RECORD SOURCE, PHONE NUMBER, and RECORD SOURCE. The table contains 20 rows of contact data, including names like Kijpsoo, Randy Brouder, Hank No-Company, Joe No-Company, Kyle-Event Japan-E., Tom Bembardt, Big Fudge, Bicker Bracker, Kijpsoo+mathhewst., Kijpsoo+mathhewstcomp., Fature Guy, Pete Block, Rachel White, Red Directoridge, Precious Filipez, Ronan Pedersen, Paul Smith, Rachel Williams, Rachel Andersen, Raquel White, Plato Pedersen, Zavis Jackson, Sarah Thompson, and Sarah Taylor. The interface includes a search bar, filters, and a pagination bar at the bottom showing '100 per page'.

NAME	EMAIL	INDUSTRY (FROM COMPANY)	CONTACT -- CONTACTS	CONTACT UNWORKED	ENGO DOWN SELECT	RECORD SOURCE	PHONE NUMBER	RECORD SOURCE
Kijpsoo+mathhewst@hubs...	kijpsoo+mathhewst@hubs...	Computer Software	HubSpot	True	...	Forms	...	Ticket Form
Randy Brouder	kijpsoo+ronnybrouder@h...	Computer Software	HubSpot	False	...	Meetings	...	...
Hank No-Company	hank@gmail.com	...	DCode	False	...	CRM UC	...	...
Joe No-Company	joe@gmail.com	...	2 records	True	...	CRM UC	...	...
Kyle-Event Japan-E.	kijpsoo+eventesting@hub...	Computer Software	HubSpot	True	...	Forms	...	...
Tom Bembardt	tom@volkswagen.de	Automotive	Volkswagen	True	Option 7	Import	...	...
Big Fudge	bigfudge@hubspot.com	Computer Software	HubSpot	True	...	CRM UC	...	...
Bicker Bracker	bickerbrack@hubspot.com	Computer Software	HubSpot	True	...	CRM UC	...	...
Kijpsoo+mathhewst.	kijpsoo+mathhewst@hubs...	Computer Software	HubSpot	True	...	Forms	...	...
Kijpsoo+mathhewstcomp...	kijpsoo+mathhewstcompa...	Computer Software	HubSpot	True	...	Forms	...	...
Fature Guy	kijpsoo+outlooknotinstan...	Wholesale	THIS IS A REAL COMP...	True	...	Forms	...	...
Pete Block	pete@volkswagen.de	Automotive	Volkswagen	True	Option 7	Integration	...	...
Rachel White	rwhite@yahoo.com	...	...	True	...	Integration	...	...
Red Directoridge	red@u.edu	Higher Education	Boston University (Ed...	True	...	Integration	...	...
Precious Filipez	precious@benley.edu	Higher Education	Benley University	True	...	Integration	...	...
Ronan Pedersen	ronan@summs.com	Restaurants	Summs Bedding Co.	True	...	Integration	...	...
Paul Smith	paul@editions.com	Leisure, Travel & Tourism	Edition Hotels	True	...	Integration	...	...
Rachel Williams	rwilliams@yahoo.com	...	...	True	...	Integration	...	...
Rachel Andersen	randeron@yahoo.com	...	...	True	...	Integration	...	...
Raquel White	raquel@crobinson.com	Transportation/Trucking/Rol...	C H Robinson Worldw...	True	...	Integration	...	...
Plato Pedersen	plato@vitol.com	Logistics and Supply Chain	Vitol Group	True	...	Integration	...	...
Zavis Jackson	zavis@reconsulting.nl	...	Reconsulting.nl	True	...	Integration	...	...
Sarah Thompson	sthompson@yahoo.com	...	...	True	...	Integration	...	...
Vlad Clyde	vlad@meridiansv.com	Automotive	Meridian Specialty Ve...	True	...	Integration	...	...
Sarah Taylor	staylor@yahoo.com	...	...	True	...	Integration	...	...

### Objects with standard CRM index pages:

- Calls
- Companies
- Contacts
- Custom objects
- Deals
- Invoices
- Marketing Events
- Orders
- Payments
- Products
- Subscriptions
- Tickets
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

Many assets in HubSpot have index pages with the same layout and functionality. These include blog posts, campaigns, CTAs, forms, landing pages, lists, marketing emails, SMS, website pages, and workflows.

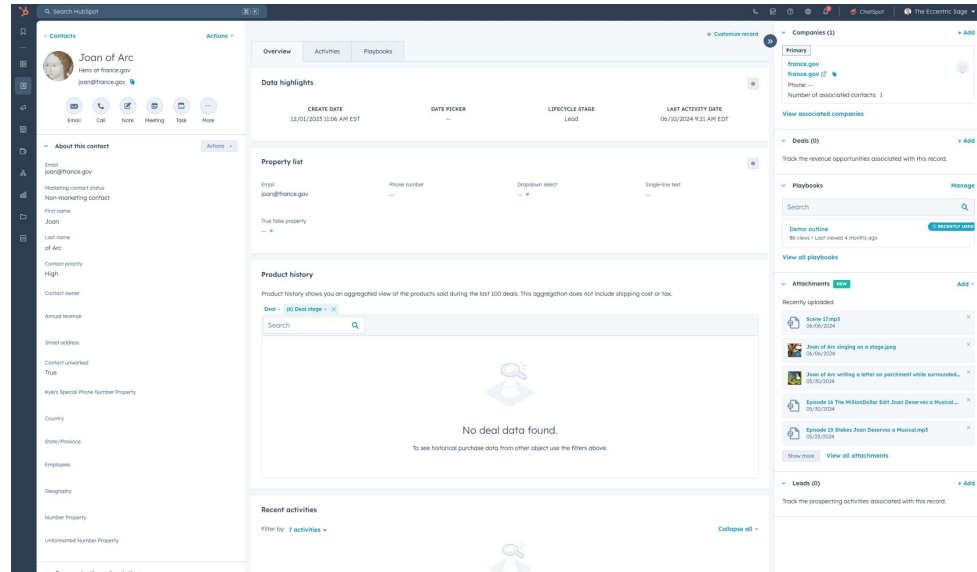
### Objects with bespoke index pages:

- Leads
- Quotes
- Tasks?

# Records


The CRM has standardized record pages for many objects. Some defining characteristics of these records are...

- A column on the left side with property values
- A column in the center with recent activities, engagements, and events
- The ability to add custom tabs with additional data to the center column
- A column on the right side with associated records
- Buttons for creating engagements





### Objects with standard CRM record pages:

- Companies
- Contacts
- Custom objects
- Deals
- Tickets
- Orders
- Carts
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

Campaigns and Marketing Events have a different full-page record. The similarities between the two are striking, and I wonder if other marketing assets will have similar records in the future. Only time will tell.

### Objects with preview-only records:

- Calls (recorded calls get a fully bespoke record)
- Invoices
- Payments
- Products
- Subscriptions

# Owners

Core CRM objects come with a standard “owner” property that assigns a record to a user. Ownership can be...

- Used to grant and restrict access
- Used to break down reports
- Assigned in bulk from index pages
- Assigned during an import
- Set automatically by workflows

Contact owner

No owner ▼



Details

### Objects with a standard “owner” property:

- Companies
- Contacts
- Custom objects
- Deals
- Invoices
- Marketing Events
- Orders
- Payments
- Products
- Subscriptions
- Tickets
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

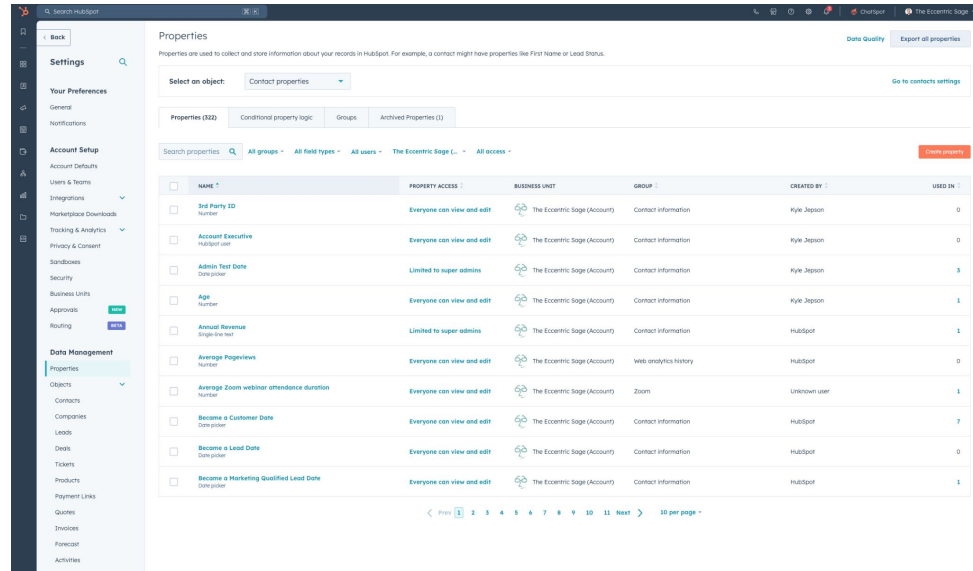
Many assets in HubSpot can be assigned to users as well. These include campaigns, workflows, meeting scheduling links, sequences, templates, snippets, and reports.

# Customize and Collect Data

# Properties

Objects have properties to store information about them. There are standard properties that come with HubSpot, and you can create your own custom properties.

Check out the Properties Cheatsheet for a deep dive into the available properties and property types. Here in the Objects Cheatsheet, we'll just focus on identifying the objects that have properties in Property Settings.



The screenshot shows the HubSpot Properties management interface. The left sidebar contains navigation options: Back, Settings, Your Preferences (General, Notifications), Account Setup (Account Defaults, Users & Teams, Integrations, Marketing & Analytics, Tracking & Analytics, Privacy & Consent, Sandboxes, Security, Business Lists, Approvals, Routing), and Data Management (properties, Objects, Contacts, Companies, Leads, Deals, Tickets, Products, Payment Links, Quotes, Invoices, Forecasts, Activities). The main content area is titled 'Properties' and includes a search bar, a 'Select an object' dropdown (set to 'Contact properties'), and a 'Go to contacts settings' link. Below this is a table of properties with columns for Name, Property Access, Business Unit, Group, Created By, and Used In. The table lists 11 properties, including 'Std Party ID Number', 'Account Executive', 'Admin Text Date', 'Age Number', 'Annual Revenue Single-line text', 'Average Pageviews Number', 'Average Zoom webinar attendance duration', 'Become a Customer Date Date picker', 'Become a Lead Date Date picker', and 'Become a Marketing Qualified Lead Date Date picker'. A pagination bar at the bottom shows '10 per page'.

<input type="checkbox"/>	NAME	PROPERTY ACCESS	BUSINESS UNIT	GROUP	CREATED BY	USED IN
<input type="checkbox"/>	Std Party ID Number	Everyone can view and edit	The Economic Sage (Account)	Contact information	Kyle Jepson	0
<input type="checkbox"/>	Account Executive	Everyone can view and edit	The Economic Sage (Account)	Contact information	Kyle Jepson	0
<input type="checkbox"/>	Admin Text Date	Limited to super admins	The Economic Sage (Account)	Contact information	Kyle Jepson	3
<input type="checkbox"/>	Age Number	Everyone can view and edit	The Economic Sage (Account)	Contact information	Kyle Jepson	1
<input type="checkbox"/>	Annual Revenue Single-line text	Limited to super admins	The Economic Sage (Account)	Contact information	HubSpot	1
<input type="checkbox"/>	Average Pageviews Number	Everyone can view and edit	The Economic Sage (Account)	Web analytics history	HubSpot	0
<input type="checkbox"/>	Average Zoom webinar attendance duration	Everyone can view and edit	The Economic Sage (Account)	Zoom	Unknown user	1
<input type="checkbox"/>	Become a Customer Date Date picker	Everyone can view and edit	The Economic Sage (Account)	Contact information	HubSpot	7
<input type="checkbox"/>	Become a Lead Date Date picker	Everyone can view and edit	The Economic Sage (Account)	Contact information	HubSpot	0
<input type="checkbox"/>	Become a Marketing Qualified Lead Date Date picker	Everyone can view and edit	The Economic Sage (Account)	Contact information	HubSpot	1

### Objects with editable properties:

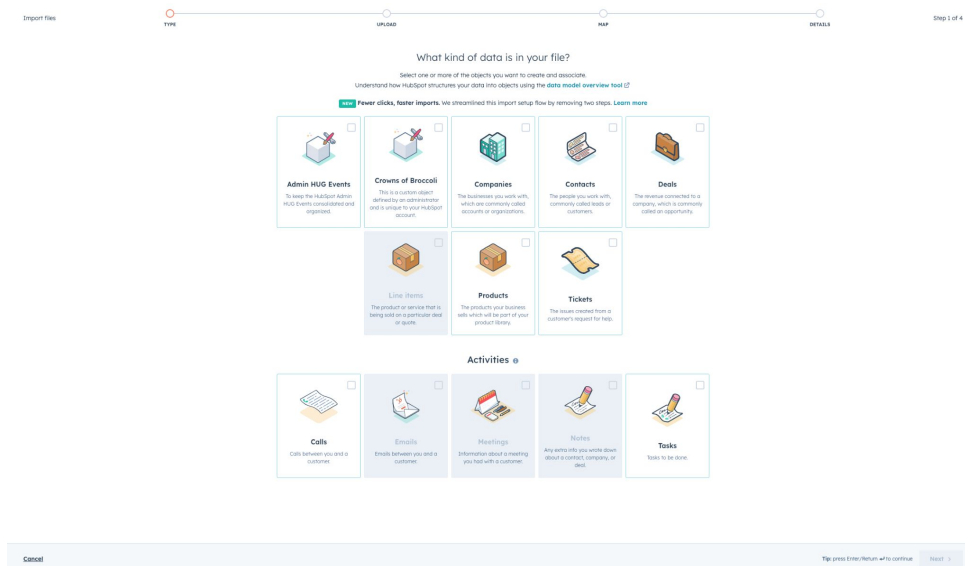
- Calls
- Companies
- Contacts
- Custom Objects
- Deals
- Invoices
- Leads
- Orders
- Products
- Tickets
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

Many assets in HubSpot have editable properties as well. These include feedback submissions, lists, marketing campaigns, marketing events, and workflows.

# Importing


Importing data into HubSpot is a remarkably smooth and (dare I say it?) even enjoyable process. The importing tool has a ton of cool features that enable you to do things like...

- Validate property values
- Map variants to standardized options
- Check for errors
- Create new properties on the fly
- Deduplicate records





### Objects available in the standard importer:

- Companies
- Contacts
- Custom Objects
- Deals
- Products
- Tickets
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

You can also import sales activities (calls, emails, meetings, notes, and tasks).

### Things you can import if you know where to look:

- Blog ([option 1](#), [option 2](#), [special option just for WordPress](#))
- [Contacts on your phone](#)
- [Knowledge Base](#)
- Marketing Events ([participants](#))
- [Users](#)
- [Website content, structure, and navigation](#)

# Forms

Contacts submitting information through your website is an important way you can get richer, more accurate data into your CRM. But forms aren't just for contact data! By mapping form fields to properties on other objects, you can enable your contacts to provide data about all kinds of things.

**Fun fact:** When you use forms to collect information about custom objects, you can include a custom property that requires unique values to enable your contacts to update existing records!

The screenshot shows a CRM interface for configuring a form titled "Talk to sales". The interface is divided into two main sections: "Existing properties" on the left and a form preview on the right.

**Existing properties:** This section contains a search bar and a list of properties. Under "Frequently used properties", the following fields are listed: First name, Last name, Email, Phone number, Street address, City, State/Region, Country/Region, Mobile phone number, and Company name. Below this, there are sections for "Other form elements (Captchas, data privacy and more)", "Payment", "Contact Properties (0)", "Company Properties (24)", "Ticket Properties (7)", and "Brascol Properties (2)".

**Form Preview:** This section shows a visual representation of the form. It includes input fields for "First Name" (with a dropdown menu for "First Name" and a "Contact Property" label), "Last Name" (with a dropdown menu for "Last Name" and a "Contact Property" label), and "Email" (with a dropdown menu for "Email" and a "Contact Property" label). A red "Submit" button is positioned below the email field. At the bottom of the form preview, there is a section for "Queued progressive fields (0)".

### Objects that can be used with marketing forms:

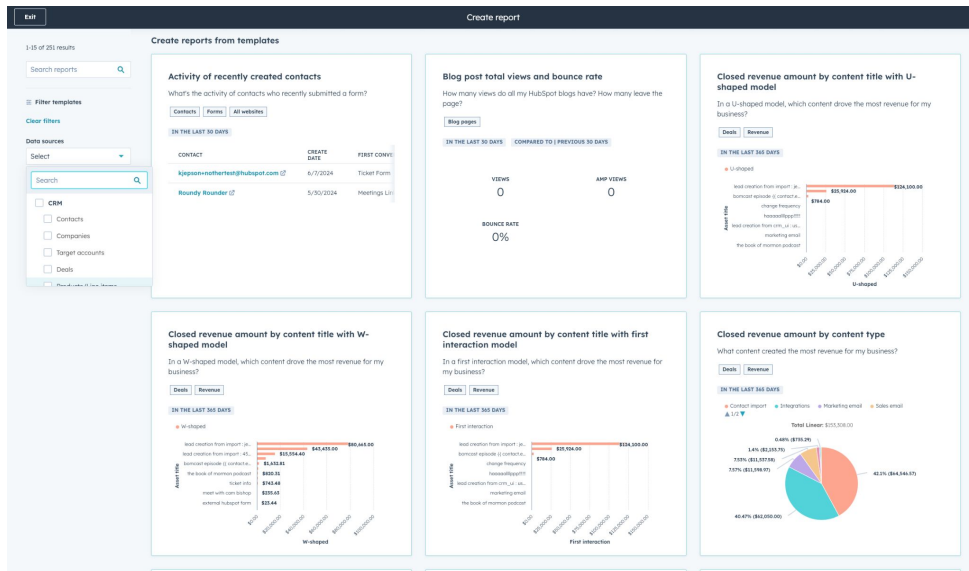
- Contacts
- Companies
- Custom Objects
- Tickets

Don't see the object you're looking for? You can use a workflow to copy values from the properties you're using as form fields to properties on these objects: Quotes, Carts, Conversations, Custom Objects, Leads, Payments, Invoices, Calls, Feedback Submissions, Orders, Deals, and Subscriptions.

# Report

# Prebuilt Reports

HubSpot has a library of more than 250 ready-to-use reports that you can add to your dashboards without having to build them from scratch. This makes it easy to get started with reporting on your HubSpot data using a variety of objects and other data sources.



## Objects with prebuilt reports in the reports library:

- Contacts
- Companies
- Deals
- Products/Line Items
- Subscriptions
- Tickets
- Calls

The reports library has many, many data sources! Beyond the objects listed here, you can use target accounts, revenue, forecast, meetings, tasks, documents, conversations, 1-to-1 Emails, Templates, Chats, Facebook Messenger, Campaigns, CTAs, Social, Ads, Forms, Marketing Emails, Websites, Landing Pages, Website Pages, Blog Posts, Knowledge Articles, Sequences, Workflows, and Feedback Surveys as data sources.

# Single-Object Reports

If the report library doesn't have the exact report you're looking for, the single-object report builder is a great tool for creating a report using an specific data source. Once your report is built, you can use it exactly the same way as you would HubSpot's standard reports.

### Choose one data source

- Contacts
- Companies
- Deals
- Activities
- Tickets
- Line items
- Feedback submissions
- Calls
- Candidates
- Cars
- Conversations
- Deliveries
- Goals
- Leads
- Meetings
- Numnums
- Payments
- Pets
- Sequence enrollments
- Shipments
- Subscriptions
- Tasks
- Users



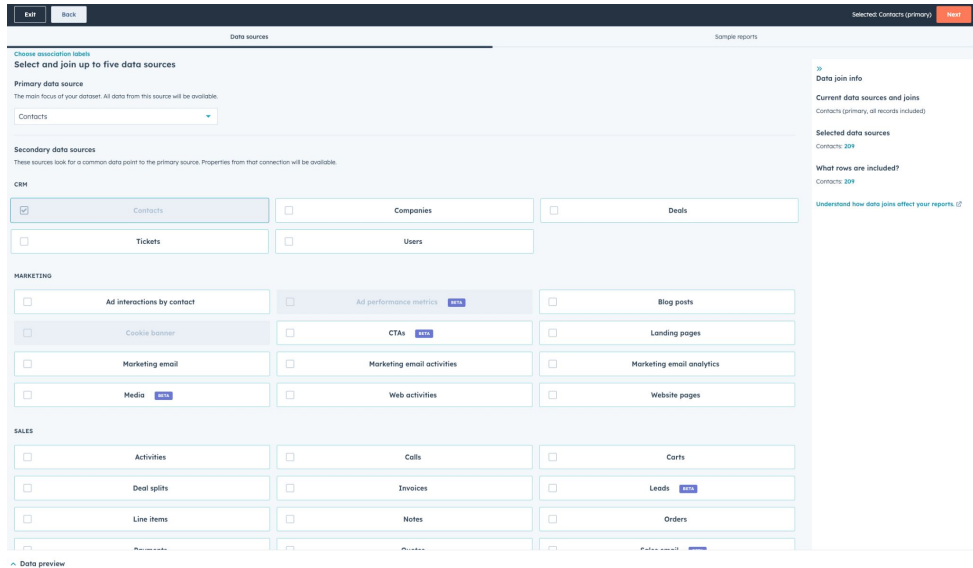
## Objects available in the single-object report builder:

- Contacts
- Companies
- Deals
- Tickets
- Line items
- Calls
- Custom Objects
- Leads
- Payments
- Subscriptions
- Users
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

There are several data sources available in the single-object report builder that I don't consider objects: Activities, Feedback Submissions, Conversations, Goals, Meetings, Sequence Enrollments, Tasks.

# Custom Report Builder

If you want to create beautiful reports leveraging multiple data sources and a variety of filters and visualizations, the custom report builder is the way to go. The number of data sources it has access to is truly dizzying, and you can create bespoke formula fields for individual reports as you go along.



## Objects available in the custom report builder:

- Calls
- Custom objects
- Companies
- Contacts
- Deals
- Invoices
- Leads
- Line Items
- Orders
- Payments
- Quotes
- Subscriptions
- Tickets
- Users
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

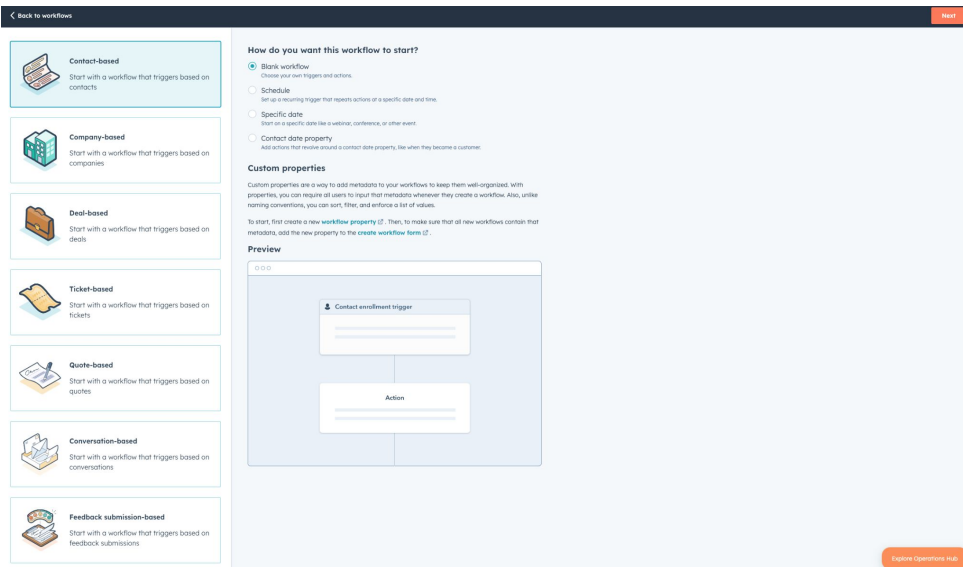
The custom report builder provides one of the most exhaustive lists of HubSpot data sources. In addition to the objects listed here, it also includes activities, ad interactions, ad performance metrics, blog posts, conversations, cookie banner, CTAs, custom events, deal splits, feedback submissions, landing pages, marketing email, marketing email activities, marketing email analytics, media, notes, sales emails, sequences, tasks, web activities, website pages.

# Automate

# Workflows

Workflows are HubSpot's automation engine, and there's a long list of data sources they can use as inputs and outputs.

This section focuses on that types of records that can be enrolled into a workflow, but there are many other types of data that can be used to trigger workflows (for example, an activity associated with a contact record) or that can be created by a workflow (for example, a task).



## Objects that can enroll in workflows:

- Contacts
- Companies
- Deals
- Tickets
- Quotes
- Subscriptions
- Payments
- Orders
- Carts
- Invoices
- Leads
- Users
- Custom objects
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

There are a few workflow types that I don't consider objects: Conversations, Feedback Submissions, and Goals.

# Integrate

# APIs

APIs are powerful tools. They are the foundation of any integration, and they also enable you to interact directly with your data outside of HubSpot's UI.


It's important to note that the word "object" means something different to a developer than it does to a CRM admin. For the purposes of this guide, we will continue using "object" in the CRM sense, but there are many, many other things in HubSpot that count as objects in the developer sense. (You'll get a sense of this on the next page.)

The screenshot shows the HubSpot API Docs page. At the top, there's a navigation bar with 'Go To My Account' and 'Create a developer account' buttons. Below that is the 'HubSpot Developers' header with 'Documentation', 'Resources', and 'Marketplace' links. A green banner below the header says 'We are improving our documentation experience. View Beta Docs'. The main content area is titled 'HubSpot API Docs' and has a search bar with the text 'Find any doc, guide, or tutorial...'. The page is divided into two columns. The left column is a table of contents with sections: Introduction, Account, Analytics & Events, and Automation. The right column is the main content area, titled 'Understanding the CRM'. It contains text explaining the CRM database and lists various objects: Contacts, Companies, Deals, Tickets, Calls, and Quotes.



## Objects with APIs:

### CRM APIs

- Companies
- Contacts
- Custom Objects
- Deals
- Leads
- Tickets
- “Object Library” objects 
  - Appointments
  - Courses
  - Listings
  - Services

### CRM-ish APIs

- Calls (“Engagements”)
- Marketing Events
- Users (“Owners”)

### Commerce APIs

- Carts
- Invoices (read only)
- Line items
- Orders
- Payments
- Products
- Quotes
- Subscriptions

LOTS of things have APIs in HubSpot. This list are the ones categorized as objects. In addition, there are also APIs for content (templates, layouts, blogs, media bridge, pages, HubDB, site search, domains, URL redirects, content audit, source code), conversations, CRM engagements (calls, communications, emails, meetings, notes, postal mail, tasks), non-object commerce things (discounts, fees, taxes), lists, import and export, CRM search, “owners” (users), associations, deal splits, goals, pipelines, properties, marketing events, marketing emails, subscription preferences, forms, files, feedback submissions, webhooks, and workflows.

# Summary

# Objects in HubSpot: A Summary

- ★ - Full functionality
- ⚠ - Partial functionality
- - Missing functionality

	Index pages	Records	Owners	Properties	Importing	Forms	Prebuilt Reports	Single-Object Reports	Custom Report Builder	Workflows	APIs	
CRM Objects	<a href="#">Contacts</a>	★	★	★	★	★	★	★	★	★	★	
	<a href="#">Companies</a>	★	★	★	★	★	★	★	★	★	★	
	<a href="#">Deals</a>	★	★	★	★	-	★	★	★	★	★	
	<a href="#">Tickets</a>	★	★	★	★	★	★	★	★	★	★	
Optional Objects	<a href="#">Object Library</a>	★	★	★	★	-	-	★	★	★	★	
	<a href="#">Custom Objects</a>	★	★	★	★	★	-	★	★	★	★	
Commerce Objects	<a href="#">Carts</a>	★	★	★	-	-	-	-	-	★	★	
	<a href="#">Invoices</a>	★	⚠	★	★	-	-	-	★	★	⚠	
	<a href="#">Orders</a>	★	★	★	★	-	-	-	★	★	★	
	<a href="#">Payments</a>	★	⚠	★	-	-	-	★	★	★	★	
	<a href="#">Products</a>	★	⚠	★	★	★	-	★	⚠	⚠	-	★
	<a href="#">Quotes</a>	⚠	⚠	★	-	-	-	-	★	★	★	★
Future CRM Objects?	<a href="#">Subscriptions</a>	★	⚠	★	-	-	★	★	★	★	★	
	<a href="#">Leads</a>	⚠	⚠	★	★	-	-	★	★	★	★	
	<a href="#">Users</a>	⚠	⚠	-	-	⚠	-	★	★	★	★	
Integration Object?	<a href="#">Marketing Events</a>	★	⚠	★	★	⚠	-	-	-	-	★	
Wannabe Object?	<a href="#">Calls</a>	★	⚠	★	★	★	-	★	★	★	★	