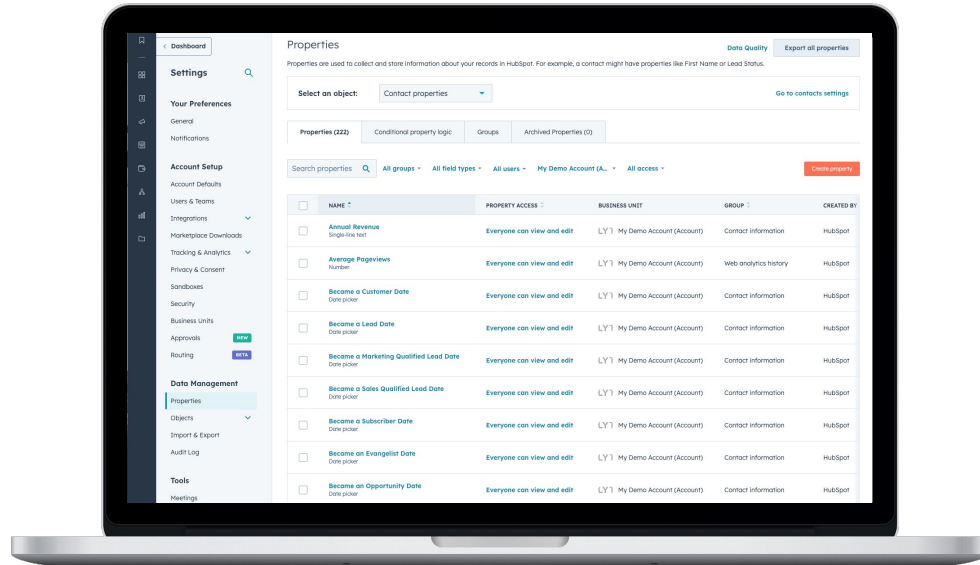


# Properties Cheat Sheet

How to Familiarize Yourself with Standard HubSpot Properties

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# Quick Refresher

Where do I access property settings?

- Settings > Properties

How do I filter for a specific object?

- Settings > Properties

How do I read the property table?

- Group: Used for CRM organizational purposes
- Name: Name of the property
- Used In: Asset and tools where a property is referenced

What do the terms in the create a property screen mean?

- Label: Name of the property
- `</>` Icon / Internal name: Backend name used for unique identification purposes and API calls
- Description: Conveys additional detail about the property

Properties

Properties are used to collect and store information about your records in HubSpot. For example, a contact might have properties like First Name or Lead Status.

Select an object: Contact properties

Properties (304) Conditional property logic Groups Archived Properties (0)

Search properties All groups All field types All users All business units All access Create property

<input type="checkbox"/>	NAME	PROPERTY ACCESS	BUSINESS UNIT	GROUP	CREATED
<input type="checkbox"/>	Advanced Calculation Calculation	Limited to super admins	The OG (Account)	Contact activity	Andre
<input type="checkbox"/>	AMOUNT CALCULATION Rollup	Everyone can view and edit	The OG (Account)	Contact activity	Andre
<input type="checkbox"/>	Annual Revenue Single-line text	Everyone can view	The OG (Account)	Contact information	HubS
<input type="checkbox"/>	Average Pageviews Number	Everyone can view	The OG (Account)	Web analytics history	HubS
<input type="checkbox"/>	Become a Customer Date Date picker	Everyone can view	The OG (Account)	Contact information	HubS
<input type="checkbox"/>	Become a Lead Date Date picker	Everyone can view	The OG (Account)	Contact information	HubS

## Properties

Properties are used to collect and store information about your records in HubSpot.

Select an object: Contact properties

### Create a new property

BASIC INFO FIELD TYPE RULES

Object type \*  
Contact

Business unit \*  
The OG (Account)

Group \*  
Select group

Label \*  
`</>`

Description

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# 01 - Field Types

Text Input

Choosing Options

Values

Other

# Text Input

Name	Holds	Filter Rules	Customization
Single-line text	Text & numbers without line breaks	<ul style="list-style-type: none"><li>- Contains any of</li><li>- Equal to any of</li><li>- Is known/unknown</li><li>- Starts/ends with</li><li>- Has ever been/not been</li></ul>	<ul style="list-style-type: none"><li>- Require unique value**</li><li>- Min. character limit</li><li>- Max. character limit</li><li>- Restrict to numeric values</li><li>- Don't allow special characters</li></ul>
Multi-line text	Text & numbers with line breaks	<ul style="list-style-type: none"><li>- Contains any of</li><li>- Equal to any of</li><li>- Is known/unknown</li><li>- Starts/ends with</li><li>- Has ever been/not been</li></ul>	<ul style="list-style-type: none"><li>- Require unique value**</li><li>- Min. character limit</li><li>- Max. character limit</li><li>- Restrict to numeric values</li><li>- Don't allow special characters</li></ul>
Phone number	Text & numbers without line breaks	<ul style="list-style-type: none"><li>- Contains any of</li><li>- Equal to any of</li><li>- Is known/unknown</li><li>- Starts/ends with</li><li>- Has ever been/not been</li></ul>	N/A

# Choosing Options

Name	Holds	Filter Rules	Customization
Single checkbox	Boolean values	<ul style="list-style-type: none"><li>-Equal to / Not equal to</li><li>-Is known/unknown</li><li>- Has ever been equal to / not been equal to</li></ul>	N/A
Multi checkbox	Pre-defined options(select one or more)	<ul style="list-style-type: none"><li>- Is any of / not any of</li><li>- Is known / unknown</li><li>- Is equal to all of / not equal to all of</li><li>- Has ever been any of / not been any of</li></ul>	N/A
Dropdown select	Pre-defined options (choose one)	Same as Multi checkbox	N/A

# Choosing Options 2

Name	Holds	Filter Rules	Customization
Date picker	Date or Datetime*	<ul style="list-style-type: none"><li>- Is equal to</li><li>- Is before / after</li><li>- Is between / not between</li><li>- More than / less than X days ago</li><li>- More than / less than X days from now</li><li>- Is known / unknown</li></ul>	N/A
Radio select	Text & numbers with line breaks	<a href="#">Same as Multi checkbox</a>	N/A

# Date vs Datetime

Date picker – Only calendar dates

Datetime picker – Calendar dates and time of day

- ❑ When viewing a datetime property, HubSpot uses the user's time zone. In workflows, lists, and other HubSpot tools, the system uses the account's time zone for filtering [Settings > Account Defaults].
- ❑ Most HubSpot standard properties are datetime. Custom properties can be either date or datetime.

Troubleshooting tip: If a workflow or other HubSpot tool is rejecting a date value, check if your property is formatted as date or datetime. Certain calculation properties require a datetime property, and will otherwise return a 01.01.1970 calculation.



# Values

Name	Holds	Filter Rules	Customization
Number	Numerical values	<ul style="list-style-type: none"><li>- Is equal to / not equal to</li><li>- Is less than / greater than</li><li>- Is less than or equal to / greater than or equal to</li><li>- Is known / unknown</li></ul>	<ul style="list-style-type: none"><li>- Require unique value**</li><li>- Min. character limit</li><li>- Max. character limit</li><li>- Limit number of decimal places</li></ul>
Calculation	Strings, booleans, dates, or numbers	<ul style="list-style-type: none"><li>- Depends on the output selected.</li><li>- e.g. string would match <a href="#">single-line text</a></li></ul>	<ul style="list-style-type: none"><li>- Default calculation properties = N/A</li><li>- Custom calculation properties = depends on your custom setup</li></ul>
Score	Numerical output	<ul style="list-style-type: none"><li>- Is equal to / not equal to</li><li>- Is less than / greater than</li><li>- Is less than or equal to / greater than or equal to</li><li>- Is known / unknown</li></ul>	N/A

## Field Types: Part 6

# Other

Name	Holds	Filter Rules	Customization
Rich Text	Text and numbers with line breaks and formatting options	<ul style="list-style-type: none"><li>- Contains any of</li><li>- Equal to any of</li><li>- Is known/unknown</li><li>- starts/ends with</li><li>- Has ever been/not been</li></ul>	N/A
File	File URLs or IDs	<ul style="list-style-type: none"><li>- Contains any of</li><li>- Equal to any of</li><li>- Is known/unknown</li><li>- starts/ends with</li><li>- Has ever been/not been</li></ul>	<ul style="list-style-type: none"><li>- File visibility = Private or Public</li><li>- Public = url value shareable externally</li><li>- Private = File restricted to Hubspot users</li></ul>
HubSpot User	Pre-defined options (based on users in the account)	<ul style="list-style-type: none"><li>- Is any of / not any of</li><li>- Is known / unknown</li><li>- Is equal to all of / not equal to all of</li><li>- Has ever been any of / not been any of</li></ul>	N/A

# Other - 2

Name	Holds	Filter Rules	Customization
Property Sync (NEW)	Strings, booleans, dates, or numbers	<ul style="list-style-type: none"><li>- Depends on the output selected.</li><li>- e.g. string would match <u>single-line text</u></li></ul>	N/A

Syncs pre-existing property of your choice to another object.

- If the “from” object has more than one association to the “receiving” object, you need to choose either the first or last associated record as the sync logic.
  - e.g. Contact First Name property sync to its associated Company record
  - e.g. Jane has two companies, Personal and Business, with Personal being the first associated. Selecting ‘first created’ in the property setup would sync to the Personal company.

## 02 - Contacts

Invaluable Properties - Set yourself up for success in your CRM with these useful properties

Top User-created Properties - Most frequently created properties outside of the default options

Often Interchanged - Properties with similar names that serve different purposes

# Invaluable properties - 1

Name	Description	Use-cases
Record ID	Unique identifying number for the record	APIs, imports, and workflow troubleshooting. You can quickly grab this from the url when viewing a record*
NEW Record source detail 1, 2, & 3	Source of how a contact was created. Detail properties 1, 2, & 3 get more specific.	Identifying where a contact came from. Record source properties improved iteration of original source and drill-down properties. Property data starts for records created Feb 2024 onward.
Email hard bounce reason Email hard bounce quarantine	Lists reasons related to marketing email deliverability	Troubleshooting why a marketing email on the contact timeline shows “email not sent”. Can be used to build exclusion lists for marketing emails

\* e.g. [app.hubspot.com/contacts/portalID/record/0-1/12345](https://app.hubspot.com/contacts/portalID/record/0-1/12345) → 12345 = Record ID

# Invaluable properties - 2

Name	Description	Use-cases
Marketing contact status source type	Indicates the tool that set the latest marketing contact status value	Identifying how marketing contacts are being set
Marketing contact status source name	ID of specific activity setting the marketing contact status value	Additional insights for marketing contact status sources. Useful for sorting marketing contacts into groups for managing data
Marketing contact until next update	Boolean value	Making lists to see who is queued for non-marketing status

# Top User-created Properties\*

When the default options need a boost

Name	Example use case
Contact Type	Granular breakdown of the <a href="#">default Persona property</a> . Perhaps lots of contact fits a certain Persona, so there needs to be another step for specific marketing and outreach [single-line text, dropdown select, or radio select options]
Full Name	Setting up a streamlined user experience on forms. This takes 2 properties and consolidates into one. (with Operations Hub, you could convert this data into First and Last name properties with a workflow)
UTM Source	Setting up advanced analytics tracking with form submissions. You can use <a href="#">query strings and hidden form fields</a> to analyze how a contact got to your form.

# Often Interchanged

Names	Clarification
Number of sales activities Number of times contacted	<p><u>Number of sales activities</u>: The total number of sales activities logged for the contact. Includes: calls, chat conversations, LinkedIn messages, postal mail, meetings, notes, sales email, SMS message, task, or WhatsApp message</p> <p><u>Number of times contacted</u>: Does <i>not</i> include tasks and notes.</p>
Last engagement date Sends since last engagement	<p><u>Last engagement date</u>: The last date and time of one-to-one email opens and clicks, lead revisit notifications, meeting bookings, and form submissions on the contact record.</p> <p><u>Sends since last engagement</u>: The number of marketing emails that have been sent since the last engagement, specifically email open or link click.</p>



# 03 - Companies

Invaluable Properties - Set yourself up for success in your CRM with these useful properties

Top User-created Properties - Most frequently created properties outside of the default options

## Companies: Part 1

# Invaluable properties - 1

## HubSpot Insights

Auto-populated properties when creating a company in the CRM with the company domain name property. The Insights database sources are 3rd party data, web crawling, and crowdsources.

Navigation: Settings > Objects > Companies > Fill company properties using HubSpot Insights database.

- Annual revenue
- City
- Country
- Description
- Facebook company page
- Industry
- Is public
- LinkedIn bio
- LinkedIn company page
- Name
- Number of employees
- Year founded
- Phone number
- Postal code
- State/Region
- Street address
- Street address 2
- Time zone
- Total money raised
- X account handle\*
- Web Technologies
- Website URL

# Invaluable properties - 2

Name	Description	Use-cases
Company Domain Name	Unique identifying string for deduplication	Import records to update or create new without creating duplicates. Part of the automatic contact association logic [Settings > Objects > Companies].
Number of associated contacts	Number of contacts associated with a company record	Use in home page views & lists to quickly see how many contacts are associated with a record. Troubleshooting companies that have more contacts than expected.
Number of form submissions	Total number of submissions by all contacts associated with a company	Use in custom score property criteria to track engagement.

# Top User-created Properties\*

When the default options need a boost

Name	Example use case
Email	A company has several associated contacts, and you want to use the company as your primary source of truth. Adding an email property for the company can streamline communication and data access.
Notes	There is some key information that does not fit into any existing properties. A notes property can be a handy place one-stop place to store that data instead of individual ones to store one specific piece. [multi-line or rich text options]
Status	You use an <u>account-based marketing strategy</u> and need another property for specifics on where an account is at in the buying process. [single-line text, multiple checkbox, dropdown select, or radio select options]

# 04 - Deals

Invaluable Properties - Set yourself up for success in your CRM with these useful properties

Top User-created Properties - Most frequently created properties outside of the default options

Often Interchanged - Properties with similar names that serve different purposes

## Deals: Part 1

# Invaluable properties

Name	Description	Use-cases
Deal Type	Categorizing your deals. Default options provided by HubSpot: <i>New Business &amp; Existing Business</i>	Organize your deals with the pre-built or custom options to improve reporting and pipeline clarity.
Number of sales activities	Total number of activities associated with the deal including: calls, notes, tasks, chat conversations, LinkedIn messages, postal mail, sales email, meetings, SMS, or Whatsapp messages	Track sales reps productivity on their deals. Build a list of deals filtered for specific stages in the pipeline and add this property to the table view for productivity trends.
Priority	Level of attention needed on the deal	Create lists or homepage views of deals sorted by their priority. Create workflow automations to remind sales reps with tasks when a deal is marked as high priority.

# Top User-created Properties\*

When the default options need a boost

Name	Example use case
Deal Source	Your sales team works primarily out of deals and wants to see details on where a deal was generated from. [single-line text, dropdown select, and radio select options]
Email	Similar to companies, for reps working primarily out of the deal object, it would be helpful to store the contact's email on the deal record for streamlined communication.
Industry	Companies have an Industry property, why not deals, too? This one would fit well with the <a href="#">Property Sync field type</a> .

# Often Interchanged

Names	Clarification
Amount Amount in company currency Weighted amount	<p><u>Amount</u>: the total value of the deal in the deal's currency, if your HubSpot account uses more than one currency.</p> <p><u>Amount in company currency</u>: the total value of the deal in your selected company currency, when your HubSpot account uses more than one currency.</p> <ul style="list-style-type: none"><li>- calculated on exchange rate in the account</li></ul> <p><u>Weighted amount</u>: the <i>Amount</i> multiplied by the <i>Deal probability</i>.</p> <ul style="list-style-type: none"><li>- Deal probability is set via the current deal stage in the pipeline</li><li>- Settings &gt; Objects &gt; Deals &gt; Pipelines</li></ul>



# 05 - Tickets

Invaluable Properties - Set yourself up for success in your CRM with these useful properties

Top User-created Properties - Most frequently created properties outside of the default options

## Tickets: Part 1

# Invaluable properties

Name	Description	Use-cases
First agent email response date	Date of the first email response from a user. Applies for email sent in the conversations inbox or ticket record. Datetime property.	Report on support reps response time and productivity. Evaluate efficiency trends over time and areas of improvement.
Time to close SLA ticket status	Status values for a ticket based on given SLA for a ticket closure. Dropdown select options: Active SLA, Due soon, Overdue, SLA completed on time, SLA completed late. Only applicable if <u>SLA's have been setup</u>	Track reps SLA compliance and performance in reports. Build workflow automations for Due soon or Overdue statuses to remind support reps to action accordingly.
Resolution	Action taken to resolve the ticket. Radio select property.	Use the pre-built or custom options to track resolution types. Build reports or homepage views to track common resolutions, such as resolved with documentation as a starting point for a knowledge base/ FAQ page.

# Top User-created Properties\*

When the default options need a boost

Name	Example use case
Ticket Type	You can organize support cases for reporting, and depending on your subscription, set up <a href="#">routing rules</a> to specific reps based on the value.
Due Date	Report on cases that are still open past their due date. This custom property can be used in tandem with or separately to the default <a href="#">‘Time to close SLA due Date’</a> property
Industry	Companies have an Industry property, why not deals, too? This one would fit well with the <a href="#">Property Sync field type</a> .