HubSpot Glossary

Waypost has created this glossary as a quick-reference tool to help clarify HubSpot-specific terminology and ensure consistency in client communication.

Please contact your marketing strategist directly if you have questions or would like further clarification on a particular HubSpot topic.

LAST UPDATED:
20 September 2023

Table of Contents

Use this table to click and jump directly to a topic. Some defined terms contain hyperlinked (blue) information; click the hyperlink to open more information in your system's browser.

Email Types

Marketing Emails

Marketing emails are messages that are sent to a segment of subscribers, usually based on behavior, subscriptions, and user actions. You can quickly create branded marketing emails to engage with your active subscribers. You can deliver relevant subject lines and timely offers by referencing a subscriber's lifecycle stage, list membership, or information from their contact record. Regular Marketing Emails include weekly newsletters, webinar invitations, letters from the CEO, and special offers.

- One-time promotional emails
- Automated workflow emails
- Blog/Rss Marketing emails

Sales Emails

Any email sent via a user's individual mailbox and from their email address. These could be sent manually and logged via the UI or in a sequence. Most importantly, you can use these sequences for non-subscribers, non-opted-In, or even non-marketing contacts.

- One-to-one emails
- Sequences automated sales emails
- Follow up emails

Marketing Workflows & Sales Sequences

Available Actions

Workflows: sending marketing emails or SMSs, data updates, record creation, task creation, and notifications with no limits on how many triggers.

Sequences: only have sales emails and task creation and are limited to 5 email actions per sequence.

Enrollment

Workflows: a subscriber can be enrolled automatically when it meets set criteria such as submitting a form or update on a contact property or a deal creation. Anyone who has unsubscribed WILL NOT receive a marketing email (ex., Promotional, newsletter, product update)

Sequences: a contact must be enrolled manually. Non-subscribers, non-opted-In, or non-marketing contacts can be enrolled in a sequence.

Conditions.

Workflows: flexibility in functionality. You can set if/then or if/else conditions.

Sequences: no flexibility in functionality. All steps are followed unless contact is unenrolled.

Un-enrollment

Workflows: able to unenroll contacts automatically through conditions by using goal criteria or impression lists.

Sequences: only unenrolls when contact books a meeting, replies to the email or is manually unenrolled.

Performance & Reporting

Workflows: various types of goals can be used in reporting to measure however, marketing emails will not track replies.

Sequences: meeting booking and reply rates can only be used in reporting to measure performance.

When to use a Workflow vs. Sequence.

There are certain situations when Workflow is better, for example:

- If you are targeting top-of-the-funnel leads and your goal is to nurture them
- If you are sending image-rich emails or stylized emails
- If you want an action to be triggered automatically

- If a salesperson hasn't been assigned to contact and you want to assign on a round-robin basis
- If you are looking to update a specific property based on the trigger criteria
- If you want to create a deal when a contact matches certain criteria.

Situations in which a sequence is better to use are:

- You want to create a one-to-one relationship between your sales representative and the bottom-of-the-funnel lead.
- If the content of the email is highly custom-made for a specific contact, then you need to use sequence so you can make minor adjustments before enrolling each contact, making it a semi-automated approach.

Property Fields

Annual revenue . . . .

Annual company revenue.

Became a customer date . . . .

The date the contact's lifecycle stage changed to *Customer*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Became a lead date. . . . .

The date that the contact's lifecycle stage changed to *Lead*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Became a marketing-qualified lead date

When the contact's lifecycle stage changed to *Marketing Qualified Lead*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Became a sales-qualified lead to date . . . .

The date that the contact's lifecycle stage changed to *Sales Qualified Lead*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Became a subscriber date . . . .

The date the contact's lifecycle stage changed to *Subscriber*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Became an evangelist date . . . .

The date that the contact's lifecycle stage changed to *Evangelist*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Became an opportunity date . . . .

The date that the contact's lifecycle stage changed to *Opportunity*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Became an other lifecycle date

The date the contact's lifecycle stage changed to *Other*. HubSpot automatically sets this for each contact. The property will clear its value if a user manually updates the contact's lifecycle stage to a lesser value.

Business units

The business units the contact is assigned to.

Buying role

The contact plays during the sales process. You can select more than one role. The property value plays a part in HubSpot's account-based marketing features. You can edit the property to add new buying roles, but the default values cannot be deleted. Learn more about the different buying roles you might encounter during your sales process.

Campaign of last booking in meetings tool

This UTM parameter shows which marketing campaign (e.g., a specific email) referred the contact to the meetings tool for their most recent booking. This property is only populated when you add tracking parameters to your meeting link.

City

The contact's city of residence.

Close date

The date that the contact became a *Customer*. This property is set automatically by HubSpot when a deal or opportunity is marked as closed-won. It can also be set manually or programmatically.

Company name

The name of the contact's company. This is separate from the *Name* property of the contact's associated company and can be set independently. Learn more about the difference between a *Company name* and an *Associated company*.

Contact owner

The owner of the contact. This can be any HubSpot user or Salesforce integration user and can be set manually or via Workflows. You can assign additional users to the contact record by creating a custom HubSpot user field type property.

Contact priority . . . .

(Marketing Hub Enterprise, Sales Hub Enterprise, and Service Hub Enterprise only) a ranking system of contacts evenly assigned into four tiers. Contacts in tier one are more likely to become customers than contacts in tier four.

Contact unworked? . . . .

An indication if the contact has been worked. If it is true, the contact has not been assigned to an owner or has not logged a sales activity in its timeline since the contact was assigned its latest owner.

Country/Region . . . .

The contact's country of residence. This might be set via import, form, or integration.

Create date . . . .

The date the contact was created in your HubSpot account.

Created by user ID . . . .

The user that created the contact. HubSpot automatically sets this value and cannot be modified.

Date of last meeting booked in meetings tool . . . .

The date booked the farthest out from the current date. For example, if a meeting is booked for December 1st, and another meeting is booked for December 7th, the property value will appear as December 7th.

Days to close . . . .

The number of days elapsed from when the contact was created until they closed as a customer. This is set automatically by HubSpot and can be used for segmentation and reporting.

Email . . . .

The contact's primary email address.

Email domain . . . .

The contact's email domain.

Fax number . . . .

The contact's primary fax number.

First deal created date . . . .

The date of the first deal the contact is associated with.

First name . . . .

The contact's first name.

HubSpot score . . . .

The number that shows the qualification of contacts to sales readiness based on the criteria set in HubSpot's lead scoring tool.

HubSpot team . . . .

The team assigned to the contact owner for the contact.

Industry . . . .

The contact's industry.

Job title . . . .

The contact's job title.

Last activity date . . . .

The last date and time an activity was logged on the contact's record. Possible activities include a note, call, tracked and logged sales email, meeting, message, task, or chat. This is set automatically by HubSpot based on the most recent date/time set for an activity. For example, if a user logs a call and indicates that it occurred the day before, the *Last activity date* property will show yesterday's date.

Last contacted . . . .

The last date and time a chat conversation, call, sales email, meeting, or message were logged for the contact. This is set automatically by HubSpot based on the latest date of the activities in the record. For example, the *Last contacted* property in the record will show yesterday's date when a user logs a call that occurred the day before.

Last name . . . .

The contact's last name.

Last modified date . . . .

The last date and time a property related to the contact was modified. For example, if a user logs a call from the previous day today, the *Last modified date* property will show today's date.

Last NPS survey comment

(Service Hub Professional and Enterprise only) The last NPS survey comment that the contact gave.

Last NPS survey date

(Service Hub Professional and Enterprise only) The contact last submitted an NPS survey response.

Last NPS survey rating

(Service Hub Professional and Enterprise only) the last NPS survey rating the contact gave.

Last engagement date

The last date and time of one-to-one email open and clicks, lead revisit notifications, meeting bookings, and form submissions on the contact record. This is set automatically by HubSpot based on the date/time set for an activity when it's logged on the record only when the *Contact owner* property has a value.

Last sequence enrolled

The unique ID of the last sequence that the contact was enrolled in.

Last sequence enrolled date

The date the contact was enrolled into a sequence. This is the date a user enrolled a contact in a sequence, not necessarily the date of the first step that was executed.

Last sequence ended date

The date the contact was last unenrolled from a sequence.

Lead status

The contact and company property that indicates where the contact or company is within a buying cycle as a lead. Learn about the difference between *Lead status* and *Lifecycle stage*.

Likelihood to close

(Marketing Hub Enterprise and Sales Hub Enterprise only) the probability that the contact will become a customer within the next 90 days. This score is based on demographic information in standard contact properties and interactions logged in the contact timeline, such as tracked email clicks and meetings booked.

Lifecycle stage

A property used to indicate at what point the contact is within the marketing/sales process. It can be set through imports, forms, workflows, or manually on a per-contact basis.

Marketing contact status . . . .

(Marketing Hub Starter, Professional, or Enterprise only) indicates if the contact is currently a marketing or non-marketing contact.

Marketing contact status source type . . . .

(Marketing Hub Starter, Professional, or Enterprise only) indicates the tool that sets the latest value in the contact's marketing contact status.

Marketing contact status source name . . . .

(Marketing Hub Starter, Professional, or Enterprise only) indicates the ID of the specific activity that sets the latest value in the contact's marketing contact status.

Marketing contact until the next update . . . .

(Marketing Hub Starter, Professional, or Enterprise only) indicates if the contact will become a marketing or non-marketing contact upon the next update date.

Message . . . .

A default property for any message or comments the contact may want to leave on a form.

Medium of last booking in meetings tool . . . .

This UTM parameter shows which channel (e.g., email) referred the contact to the meetings tool for their most recent booking. This property is only populated when you add tracking parameters to your meeting link.

Mobile phone number . . . .

The contact's mobile phone number. The phone number is validated and formatted automatically by HubSpot based on the country code. You can select to turn off automatic formatting on a contact record, either when editing the *Mobile phone number* property or adding a phone number to call.

Next activity date . . . .

The date of the next upcoming activity for the contact. This is set automatically by HubSpot based on user actions in the contact record. This includes logging a future call, sales email, or meeting, scheduling a future meeting, or scheduling a task to be completed in the future. Emails and tasks scheduled in a sequence do not update this property.

Now in sequence . . . .

(Sales Hub Starter, Professional, and Enterprise only) indicates whether or not the contact has been enrolled in a sequence. This is set automatically to "true" when the contact is enrolled in a sequence.

Number of associated deals . . . .

The total number of all associated deals.

Number of employees . . . .

The number of company employees.

Number of sales activities . . . .

The total number of sales activities logged for the contact.

Number of sequences enrolled. . . . .

The number of times a contact was enrolled into a sequence.

Number of times contacted. . . . .

The total number of times the contact had a logged sales activity.

Owner assigned date . . . .

The most recent date the contact owner was assigned to the contact. This is set automatically by HubSpot and can be used for segmentation and reporting.

Persona . . . .

The contact's persona.

Phone number . . . .

The contact's primary phone number. The phone number is validated and formatted automatically by HubSpot based on the country code. You can select to turn off automatic formatting on a contact record, either when editing the *Phone number* property or adding a phone number to call.

Postal code . . . .

The contact's zip code.

Preferred language . . . .

The contact's preferred language for communications. This might be set via import, form, or integration.

Recent deal amount . . . .

The value of the last closed-won deal associated with that contact.

Recent deal close date

The date of the last associated deal that was closed as won.

Recent sales email clicked date

(Sales Hub Professional and Enterprise only) the date of the last time that the contact clicked on a sales email.

Recent sales email open date

The date of the last time that the contact opened a sales email. This property does not update for emails that were sent to more than one contact.

Recent sales email replied date

The date of the last time that the contact replied to a sales email sent from your connected G Suite or Outlook 365 email account.

Record ID

The unique identifier for the contact. This field is set automatically and cannot be edited. This can be used when updating contacts through importing or through API.

Salutation

The title used to address the contact.

Source of last booking in meetings tool

This UTM parameter shows which site (e.g. Twitter) referred the contact to the meetings tool for their most recent booking. This property is only populated when you add tracking parameters to your meeting link.

State/Region

The contact's state of residence.

Street address

The contact's street address, including apartment or unit #.

Time between contact creation and deal close

(Marketing Hub Professional and Enterprise only) the amount of time between when a contact was created and when the contact's *lifecycle stage* became *Customer.*

Time between contact creation and deal creation. . . . .

(Marketing Hub Professional and Enterprise only) the amount of time between when a contact was created and when the contact was associated with a deal.

Time zone . . . .

The contact's time zone. This property is set manually by selecting a pre-defined time zone.

Total revenue . . . .

Total dollar amount of all associated deals that have been closed as won.

Website URL. . . . .

The contact's company website.

Contact Email Information

Now in Workflow

Indicates if the contact is enrolled in any workflow.

Email address quarantined

Indicates that the current email address has been quarantined for anti-abuse reasons. HubSpot will not send any marketing emails to quarantined email addresses.

Email hard bounce reason

The last reason why an email hard bounced for the contact. Learn more about these hard bounce reasons.

Invalid email address

Whether the email address is invalid.

Marketing email confirmation status

The status of the contact's eligibility to receive email.

Marketing emails delivered

The number of marketing emails delivered for the current email address.

Marketing emails bounced.

The number of marketing emails sent from your account that hard or soft bounced (this does not include global bounces, that are bounces in *any* account in HubSpot's system for a permanent reason, such as an invalid recipient).

Marketing emails opened.

The number of marketing emails opened. Please note that this value is incremented at most once per email; if the same email is opened multiple times, this value will only increase by one.

Marketing emails clicked

The number of marketing emails which have had link clicks. Please note that this value is incremented at most once per email; if the same link is clicked multiple times, or multiple links in the same email are clicked, this value will only increase by one.

First marketing email send date

The date of the earliest email delivery for any marketing email.

First marketing email open date . . . .

The date of the earliest email open for any marketing email.

First marketing email click date . . . .

The date of the earliest link click for any marketing email.

First marketing email reply date . . . .

The date of the earliest reply for any marketing email.

Last marketing email send date . . . .

The date of the most recent email delivery for any marketing email.

Last marketing email open date . . . .

The date of the most recent email open for any marketing email.

Last marketing email click date . . . .

The date of the most recent link click for any marketing email.

Last marketing email reply date . . . .

The date of the most recent reply for any marketing email.

Last marketing email name . . . .

The name of the last marketing email sent.

Unsubscribed from all email . . . .

Indicates that the current email address has opted out of all email from the account.

Opted out of email [email type name] . . . .

Indicates that the current email address has opted out from emails of the specified type.

Sends since last engagement . . . .

The number of marketing emails that have been sent since the last engagement, specifically email open or link click.

Contact Web Analytics History

Average page views

The average number of pages a contact sees per session. HubSpot automatically sets this for each contact.

Event revenue

(Marketing Hub Enterprise only) event revenue can be set on the contact using HubSpot's events tool.

First page seen

The first page the contact saw on your website. HubSpot automatically sets this for each contact.

First referring site

The first website that referred the contact to your website. HubSpot automatically sets this for each contact.

First touch converting campaign

The name based on the campaign ID responsible for the first touch creation of the contact. When using this property in other HubSpot tools (e.g., filters, lists), use the campaign ID instead.

Last page seen

The last page the contact saw on your website. HubSpot automatically sets this for each contact.

Last referring site

The last website that referred the contact to your website. This is automatically set by HubSpot for each contact. This analytics property looks at the last page viewed, so this site can be internal or external.

Last touch converting campaign

The name based on the campaign ID responsible for the last touch creation of the contact. When using this property in other HubSpot tools (e.g., filters, lists), use the campaign ID instead.

Latest source

The source of the most recent interaction a contact had with your business. This is automatically set by HubSpot. The property options are not editable, but an individual's *Latest source* value can be manually changed to any of the options.

Latest source drill-down 1

Additional information about the most recent source for the last interaction the contact had with your business. This is automatically set by HubSpot and can't be manually changed for the contact. Learn more about the possible values.

Latest source drill-down 2

Additional information about the most recent source for the last interaction the contact had with your business. This is automatically set by HubSpot and can't be manually changed for the contact. Learn more about the possible values.

Number of event completions

The sum of all events the contact has experienced. This is automatically set by HubSpot for each contact.

Number of page views

The sum of all pages the contact has seen on your website. This is automatically set by HubSpot for each contact.

Number of sessions

The number of sessions the contact has had on your website. This is automatically set by HubSpot for each contact.

Original source

The first known source through which the contact interacted with your business. This is automatically set by HubSpot. The property options are not editable, but an individual's *Original source* value can be manually changed to any of the options.

Original source drill-down 1

(Formerly *Original source data 1*) additional information about the source through which the contact first interacted with your business. This is automatically set by HubSpot and cannot be manually changed for the contact. Learn more about the possible values.

Original source drill-down 2

(Formerly *Original source data 2*) additional information about the source through which the contact first interacted with your business. This is automatically set by HubSpot and cannot be changed for the contact. Learn more about the possible values.

Time first seen . . . .

The time and date when the contact first interacted with your business (website visit, form submission, manual contact creation or import). This is automatically set by HubSpot for each contact.

Time last seen. . . . .

The last time and date the contact has viewed a page on your website. This is automatically set by HubSpot for each contact.

Time of first session . . . .

The first time the contact visited your website. This is automatically set by HubSpot for each contact.

Time of last session . . . .

The last time and date the contact visited your website. This is automatically set by HubSpot for each contact.

Company Property Fields

About us

A short description of the company.

Annual revenue*

The actual or estimated annual revenue of the company.

City*

The city where the company is located.

Close date

The date the company became your customer.

Company domain name

The company's website domain. HubSpot Insights uses this domain to provide you with basic information about the company. Every property marked with an asterisk (*) can be populated automatically by HubSpot Insights once the domain name is populated.

Company owner

The HubSpot user that the company is assigned to. You can assign additional users to a company record by creating a custom HubSpot user property.

Country*

The country where the company is located.

Create date

The date the company was added to your account.

Created by user ID

The user that created the company. This value is automatically set by HubSpot and cannot be modified.

Description*

A short statement about the company's mission and goals.

First contact create date

The date the first contact for this company was created in your account. This can pre-date the company's *Create date* property. This is set automatically by HubSpot.

First deal created date

The date the first deal was created for a contact at this company. This is set automatically by HubSpot.

Ideal Customer Profile Tier

The categorization of how well a company matches your ideal customer profile, with Tier 1 being the closest to your ideal customer profile, as populated by you and your users when carrying out your account-based marketing strategy.

Industry*

The type of business the company performs. By default, this property has approximately 150 pre-defined options to select from. These options cannot be deleted, as they are used by HubSpot Insights, but you can add new custom options to meet your needs.

Is public*

Whether the company is publicly traded.

Last activity date

The last date and time of a note, call, sales email, meeting, task, or chat on the company record. This is set automatically by HubSpot based on the date/time set for an activity when it's logged on the record. For example, if a user logs a call today for a call that occurred previously, the *Last activity date* property in the record will show today's date.

Last contacted

The timestamp from the most recent chat conversation, call, email, or meeting logged for this company. This is set automatically by HubSpot.

Last modified date

The last time any property was modified for this company. This is set automatically by HubSpot.

Last Engagement Date

The last date and time of one-to-one email opens and clicks, lead revisits, meeting bookings, and form submissions on the company record. This is set automatically by HubSpot based on the date/time set for an activity when it's logged on the record.

Lead status

The company's sales, prospecting, or outreach status. By default, this property has five options. Learn how to edit a property, if you'd like more options.

Lifecycle stage

A property used to indicate at what point the company is within the marketing/sales process. Learn more about automatically syncing the company's lifecycle stage to all associated contacts.

Name*

The name of the company.

Next activity date

The date of the next upcoming activity for a company. This is set automatically by HubSpot based on user actions in the company record. This includes logging a future call, sales email, meeting, scheduling a future meeting, or scheduling a task to be done in the future.

Number of associated contacts

The number of contacts associated with the company. This is updated automatically by HubSpot.

Number of associated deals

The number of deals in the HubSpot CRM associated with the company. This is updated automatically by HubSpot.

Number of child companies

The number of child companies of this company.

Number of employees*

Total number of people who work for the company.

Number of open deals

The number of open deals associated with the company. Open deals are deals that are not in closed-won or closed-lost deal stages.

Owner assigned date

The timestamp for when a record owner was assigned to the company. This is set automatically by HubSpot.

Parent company. . . . .

The company ID of the company's parent company.

Phone number* . . . .

The company's primary phone number.

Postal code* . . . .

Postal or zip code for the company.

Recent deal amount . . . .

The value of the last associated deal closed as won. This is set automatically by HubSpot.

Recent deal close date . . . .

The date of the last associated deal closed as won. This is set automatically by HubSpot.

Record ID . . . .

The unique identifier for the company. This field is set automatically and cannot be edited. This can be used when updating companies through importing or through API.

State/Region*. . . . .

The state or region where the company is located.

Street address*. . . . .

The street address of the company.

Street address 2* . . . .

Additional address information for the company.

Target account . . . .

Whether the company is considered a target account in your account-based marketing strategy.

Time zone* . . . .

The time zone where the company or organization is located.

Total money raised* . . . .

The amount of money raised by the company.

Total revenue . . . .

The total value of deals closed with the company or organization. This is set automatically by HubSpot.

Type . . . .

The company's relationship to you (e.g., prospect, partner, reseller, vendor, or other).

Web Technologies. . . . .

The web technologies used by the company or organization. The options are created by HubSpot insights and cannot be edited.

Website URL* . . . .

The company's web address. Filling in this property will also fill in *Company domain name*.

Year founded*. . . . .

The year the company was created.

Company Social Media Information

Facebook company page* . . . .

The URL of the company's Facebook page.

Facebook fans . . . .

The number of Facebook fans the company has.

Google Plus page . . . .

The URL of the company's Google Plus page.

LinkedIn bio* . . . .

The company's LinkedIn bio.

LinkedIn company page* . . . .

The URL of the company's LinkedIn page.

Twitter bio . . . .

The company's Twitter bio.

Twitter followers . . . .

The number of Twitter followers the company has.

Twitter handle* . . . .

The company's Twitter handle.

Company Web Analytics History

Days to close . . . .

The number of days between the day the company was added to your account and the day they became a customer. This is set automatically by HubSpot.

First touch converting campaign . . . .

The campaign responsible for the first touch creation of the first contact associated with this company.

Last touch converting campaign . . . .

The campaign responsible for the last touch creation of the first contact associated with this company.

Number of pageviews. . . . .

The total number of pageviews for all contacts associated with this company. This is set automatically by HubSpot.

Number of sessions. . . . .

The total number of sessions for all contacts associated with this company. This is set automatically by HubSpot.

Original source data 1. . . . .

Information about the original source of the contact with the earliest activity for this company.

Original source data 2 . . . .

Additional information about the original source of the contact with the earliest activity for this company.

Original source. . . . .

The source (Organic search, Paid search, Email marketing, Social media, Referrals, Other campaigns, Direct traffic, or Offline sources) for the contact with the earliest activity for this company.

Time first seen . . . .

The first activity of any contact associated with this company. This is set automatically by HubSpot.

Time last seen. . . . .

The most recent activity of any contact associated with this company. This is set automatically by HubSpot.

Time of first session . . . .

The time of the first visit by a contact associated with this company. This is set automatically by HubSpot.

Time of last session . . . .

The time of the most recent session of a contact associated with this company. This is set automatically by HubSpot.

Company Conversion Information

First conversion

The first form submitted by any contact associated with the company. This is set automatically by HubSpot.

First conversion date

The date of the first conversion by any contact associated with the company. This is set automatically by HubSpot.

Number of form submissions

The total number of forms submitted by all contacts associated with the company. This is set automatically by HubSpot.

Recent conversion

The last form submitted by a contact associated with the company. This is set automatically by HubSpot.

Recent conversion date

The date of the most recent conversion by a contact associated with the company. This is set automatically by HubSpot.

Deal Properties

Amount

The deal's total value in the deal's currency if your HubSpot account uses more than one currency.

Amount in company currency

The deal's total value in your selected company currency, when your HubSpot account uses more than one currency. This value is calculated based on the exchange rates set in your HubSpot account. Changes to the exchange rate set will update the value until the deal is in a closed-won or closed-lost stage. Once the deal is moved to a closed-won or closed-lost stage, the value will be set and will only update if the historical exchange rate is edited.

Annual contract value (ACV)

The deal's value over a 12-month period in the deal's currency, if your HubSpot account uses more than one currency.

Annual recurring revenue (ARR)

The total revenue earned annually for this deal. This is calculated based on the term length and values of the recurring line items associated to the deal. If there is no term length, HubSpot assumes a term of 12 months. It does not take into account the value in the *Amount* property. This is shown in the deal's currency, if your HubSpot account uses more than one currency.

Close date

The day the deal is expected to close, or was closed. By default, the close date will be set to the last day of the month it was created, but you can set a default close date for newly created deals in the desktop app. A deal's close date is automatically set or updated by HubSpot when:

- A user creates an open deal and does not manually select a close date.
- A user moves a deal into a closed-won or a closed-lost deal stage.

This includes moving a deal that was already in a closed-won deal stage to a closed-lost deal stage, or from a closed-lost deal stage to a closed-won deal stage.

Closed lost reason

Reason why the deal was lost. Learn more about customizing *Closed lost reason* options.

Closed won reason

Reason why the deal was won.

Create date . . . .

The date the deal was created. This property is set automatically by HubSpot.

Created by user ID . . . .

The user that created the deal. This value is automatically set by HubSpot and cannot be modified.

Currency . . . .

The currency that the total value of the deal is set in. This property will only appear if you've set up multiple currencies in your account *(Starter, Professional and Enterprise only)*.

Deal description . . . .

A brief description of the deal.

Deal name . . . .

The name you have given this deal.

Deal owner . . . .

The user from your team that the deal is assigned to. You can assign additional users to a deal record by creating a custom HubSpot user property.

Deal probability . . . .

The probability that the deal will close. This property is updated automatically by HubSpot when a user moves a deal to a new stage based on the Win probability set for each deal stage in the pipeline settings. If you manually edit a deal's probability, the property will no longer be updated automatically based on the pipeline's open stages. Manual updates include updating a value on a record, bulk editing records, and changes made via data sync integrations or API. The deal probability will only be automatically set again if that deal moves to a *Closed Won* stage (100%) or a *Closed Lost* stage (0%), which can be set in bulk via a workflow.

Deal stage . . . .

Deal stages allow you to categorize and track the progress of the deals that you are working on. Learn more about setting up and customizing your deal stages.

Deal type . . . .

Deal types allow you to categorize your deals. The default options created by HubSpot are *New Business* or *Existing Business,* but you can edit or add new deal types in your deal property settings.

Forecast amount

The deal amount multiplied by the forecast probability. This can be used as a filter when building a custom report. To view expected revenue in the forecast tool or when viewing an individual deal record, it is recommended to use the *Weighted amount* property.

Forecast category

The likelihood of the deal closing, categorized as *Omit*, *Pipeline*, *Best case*, *Most likely*, *Commit*, or *Closed*. This helps you and other users understand the likelihood of the deal closing when manually forecasting. You can also edit the property values to create and use custom categories to forecast your deal revenue.

Forecast probability

The custom percent probability that the deal will close. To customize and automatically calculate this property, you'll need to create a workflow with the *Set a property value* action *(Professional and Enterprise only)*.

HubSpot team

The team assigned to the deal owner for the deal. Learn more about creating teams in HubSpot.

Last activity date

The last time a note, chat conversation, call, email, meeting, message, or task was logged for a deal. This is updated automatically by HubSpot.

Last contacted

The last time a chat conversation, call, sales email, meeting, or message was logged for this deal. This is set automatically by HubSpot based on user actions.

Last modified date

The most recent date that any property on a deal was updated. This is updated automatically by HubSpot.

Monthly recurring revenue (MRR)

The recurring revenue each month for this deal. This is calculated using the values and term length of the recurring line items associated to the deal (i.e., total value divided by the number of months in the term length). It does not take into account the value in the *Amount* property. This is shown in the deal's currency, if your HubSpot account uses more than one currency.

Next activity date

The date of the next upcoming activity for a deal. This is set automatically by HubSpot based on user action. This includes logging a future call, sales email, or meeting using the *Log* feature, as well as creating a future task or scheduling a future meeting. This is updated automatically by HubSpot.

Next step

The next steps that you or another user will take to improve the deal's likelihood to close. You can edit this property in the forecast tool and the value will update on the deal record.

Number of associated contacts

The number of contacts associated with this deal. This is updated automatically by HubSpot.

Number of sales activities

The total number of sales activities logged for a deal. This is updated automatically by HubSpot.

Number of times contacted.

The total number of activities that are logged for associated contact records and are associated with the deal. This is set automatically by HubSpot based on the timeline in the contact record.

Owner assigned date

The date the most recent deal owner was assigned to a deal. This is updated automatically by HubSpot.

Pipeline

The pipeline a deal is in, which determines the deal stages the deal will move through. You can learn more about how to set up your deal pipelines and deal stages here.

Priority

The level of attention needed on the deal.

Record ID

The unique identifier for the deal. This field is set automatically and cannot be edited. This can be used when updating deals through importing or through API.

Total contract value (TCV)

The total value of the deal, based on the line items associated to the deal, including any recurring revenue and one-time charges. It does not take into account the value in the *Amount* property. This is in the deal's currency, if your HubSpot account uses more than one currency.

Weighted amount

The Amount multiplied by the Deal probability. This can be used as the default deal amount in the forecast tool, or in a custom single object report. It is recommended to use this property instead of Forecast amount when reviewing expected revenue on an individual deal record.

Deals Calculated Information

These properties are used only as measures or filters when building a custom report and will not appear in your properties settings or on individual deal records.

Deal Status . . . .

Groups your deals into *Won*, *Lost*, or *Open* (includes all other stages) and can be used when building a custom single object report to show you a count of deals in each stage type.

Closed amount . . . .

The *Amount* value for deals marked as *Closed Won* in the deal's currency, if your HubSpot account uses more than one currency. This can be used as a filter when building a custom single object report.

Days to close . . . .

The time between *Create date* and *Close date*. This can be used as a filter when building a custom single object report.

Time in Stage [Deal Stage Name] . . . .

Calculated for a deal after it leaves a given stage. This is not calculated for a deal's current stage. This can be used as a filter when building a custom single object report.

Recurring Revenue Information (Sales Hub Enterprise only)

These properties are auto-generated when you set up recurring revenue tracking in your account.

Recurring revenue amount . . . .

The total amount of recurring revenue associated with a deal.

Recurring revenue deal type . . . .

The deal type. The available values for this property are *New business*, *Renewal*, *Upgrade*, and *Downgrade*.

Recurring revenue date . . . .

The date when recurring revenue for this deal is no longer collected.

Recurring revenue inactive reason. . . . .

The reason why recurring revenue is no longer collected. The available values are *Churned*, *Renewal*, *Upgrade*, and *Downgrade*.