Kyle's

Property Cheat Sheet

Default properties every HubSpot admin needs to know

GENERAL PROPERTIES

A VERSION OF THESE PROPERTIES EXISTS ON MULTIPLE OBJECTS

Really Useful Properties

NAME	DESCRIPTION	NOTES
Business unit	Multi-select list of BUs	If you have multiple BUs, use this property to filter your records.
Merged contact IDs Merged company IDs Merged deal IDs Merged ticket IDs Merged record IDs (custom objects)	The record IDs of records that have been merged into this record.	Handy for troubleshooting and detective work
Next activity date	Date of the next upcoming activity (meeting, task, etc.) for this record	Handy filter for sales views (to identify records that don't have any scheduled activities) Exists on contacts, companies, deals, and tickets
Owner assigned date	Date that the current owner was assigned	Can be useful in identifying records that are underserved. Exists on contacts, companies, deals, tickets, and custom objects
Record ID	The unique identifying for the record	Useful in APIs and imports (when using an import to update existing records) Exists on contacts, companies, deals, tickets, and custom objects

Easily Confused Properties

NAME	DESCRIPTION	NOTES
Last activity date Last contacted Last modified date	Easily confused date properties	“Last contacted” is the last date and time a chat conversation, call, sales email, meeting, or message was logged for the contact. (These are customer-facing activities.) “Last activity date” includes everything in “Last contacted” PLUS notes and tasks. So if a contact hasn’t been contacted in three weeks, but a user logged a note on the contact record yesterday, “Last contacted” will be three weeks ago and “Last activity date” will be yesterday. (A mix of customer-facing and internal activities.) “Last modified date” gives the last date that a property on the contact record was updated. (This is purely internal.) All three exist on contacts, companies, deals, and tickets. Custom objects have only “Object last modified date/time.” Note that contacts also have a “Last engagement date” property (see slide 6).

CONTACT PROPERTIES

YA KNOW, FOR CONTACTS

Really Useful Contact Properties

NAME	DESCRIPTION	NOTES
Contact unworked	A true/false property that indicates whether the contact has been worked. It is TRUE if the contact has not been assigned to an owner OR if it has not had a sales activity logged in its timeline since the current owner was assigned.	Handy filter for sales views (to identify overlooked leads). Combine with “Owner assigned date” to see how long the current owner has had the contact and not worked it.
Currently in sequence	True/False property	Handy filter for sales views (to avoid double hitting contacts).
Last engagement	Date	The last date and time that the contact opened or clicked an email, visited your website, booked a meeting, or submitted a form. (These show that the contact is taking action on their side.)
Message	A text property for any message or comments the contact may want to leave on a form.	Use this property instead of gumming up your CRM with custom properties for forms and meeting booking pages.

Easily Confused Contact Properties (1 of 3)

NAME	DESCRIPTION	NOTES
Number of sales activities Number of times contacted	Easily confused number properties	“Number of times contacted” gives the total number of calls, chat conversations, LinkedIn messages, postal mails, meetings, sales emails, SMS messages, and WhatsApp messages that have been logged for the contact. “Number of sales activities” includes everything in “Number of times contacted” PLUS notes and tasks.
Recent sales email clicked date Recent sales email open date Recent sales email replied date Marketing emails delivered Marketing emails bounced Marketing emails opened Marketing emails clicked	Date properties Number properties	The sales email properties give the date that a sales email (meaning a one-to-one email sent either from the CRM or from an integrated email client) was opened, clicked, or replied to. The marketing email properties give a count of marketing emails (meaning mass emails sent through the marketing email tool) bounced or were delivered, opened, or clicked. Note also that the marketing email properties are tied to the contact’s current email address, so if the email address changes for any reason, these properties will be updated with values for the new email address, overwriting the values for the old email address.

Easily Confused Contact Properties (2 of 3)

NAME	DESCRIPTION	NOTES
Original source Original source drill-down 1 Original source drill-down 2 Latest source Latest source drill-down 1 Latest source drill-down 2	"Original source" and "Latest source" are dropdown properties with nine options: • Organic search • Paid search • Email marketing • Organic social • Referrals • Other campaigns • Direct traffic • Offline sources • Paid social The drill-downs are text properties.	These properties tell you where contacts come from, and they're all set automatically. "Original source" and "Latest source" give you a high-level categorization of where the contact came from, while the drill-down properties give you details. The information gets more specific as you move from source to drill-down 1 to drill-down 2. For example, if you have a source of "Paid social," the drill-down 1 will give you the social platform, and drill-down 2 will give you the name of the ad campaign. More examples and details here. "Original" means the first recoded source, and "Latest" means the most recent. Latest may change over time, but original will not. NOTE: There's also a "Sources" measure in the single-object report builder to show a count of contacts who originated from online or offline sources. (Online and offline are the only options.)

Easily Confused Contact Properties (3 of 3)

NAME	DESCRIPTION	NOTES
Legal basis for processing contact's data Marketing contact status	Multiple checkboxes Single checkbox	"Legal basis" is tied to GDPR and controls whether you can communicate with a contact. "Marketing contact status" is tied to HubSpot billing and controls who you can marketing to. These two overlap in some of the things they do. For example, if you have GDPR settings turned on in your account, a contact will need a legal basis for contact AND be a marketing contact in order for you to be able to email them.
Time last seen Time of last Session	Easily confused date properties	"Time of last session" is the date and time of when they last arrived at your website. "Time last seen" is the date and time when they were last on your website. So if a contact's last session was one hour long, "Time last seen" will be one hour later than "Time of last session."

Tricky Contact Properties

NAME	DESCRIPTION	WHAT'S TRICKY ABOUT IT
Became a customer date Became a lead date Became a marketing qualified lead date Became a sales qualified lead date Became a subscriber date Became an evangelist date Became an opportunity date Became an other lifecycle date	The date a contact's lifecycle stage property changed to a particular stage.	Automatically cleared if a user changes Lifecycle Stage to a lesser value (but will still be visible in property history.) You won't automatically get properties like this for any custom lifecycle stages you create. ("Became an other lifecycle date" is specifically for the standard lifecycle stage called "Other")
Company name	The name of the contact's company (theoretically)	This value is manually set and is completely independent of the name of any associated company records. If you're going to use this property, you'll likely want to create a workflow that takes the contact's primary company's Name property and copies that value into this property on the contact record.
Number of page views	The total number of pages the contact has viewed on your website	There isn't a way to filter this down to see how many pages they viewed during a particular amount of time or how many times they've viewed a particular page. It's just the sum total of views for all pages and all time.

COMPANY PROPERTIES

TWO’S COMPANY

Really Useful Company Properties

NAME	DESCRIPTION	NOTES
Ideal customer profile tier	A dropdown categorization of how well a company matches your ideal customer profile.	By default, there are three option (Tier 1, Tier 2, Tier 3), but these can be edited. You'll need to create a workflow to update this property. There are templates you can use to help you get started.
Target account	True/false property	Can be set manually or automatically. When set to TRUE, the company will appear in your Target Account app and reports.

Tricky Company Properties (1 of 2)

NAME	DESCRIPTION	WHAT'S TRICKY ABOUT IT
Annual revenue Total revenue	Number property Calculation property	Both properties talk about revenue, but one is talking about the company's revenue while the other is talking about *your* revenue. "Annual revenue" is the amount of revenue the company generates for itself each year. "Total revenue" is the summed amounts of won deals associated with the company (meaning the revenue you've gotten from this company).

Tricky Company Properties (2 of 2)

NAME	DESCRIPTION	WHAT'S TRICKY ABOUT IT
Annual revenue City Country Description Industry Is public Name Number of employees Phone number Postal code State/Region Street address Street address 2 Time zone Total money raised Website URL Year founded	A collection of basic company information	If you provide a company's website domain name, HubSpot will attempt to automatically populate these properties with HubSpot Insights. This works really well in some geos and industries and really poorly in others. If you find that HubSpot Insights aren't all that insightful, you can disable the feature (instructions here).

DEAL PROPERTIES

SUCH A DEAL!

Really Useful Deal Properties

NAME	DESCRIPTION	NOTES
Deal tags	Multiple checkboxes	If you're using the automatic deal tagging feature (and you should!), any tags that apply to a particular deal will be listed in this property. You can then use your tags in filters, workflows, and reports.
Is Deal Closed?	True/False	TRUE if the deal is closed (won or lost). This is useful in reporting to aggregate data on all closed deals without having to select closed-won and closed-lost from each pipeline.
Next step	Text property	A place where sales reps can jot down actions they need to take to help the deal move forward. Great for use in coaching conversations. Add it to a filtered view your reps and managers use during one-to-one meetings, and then notes can be added to deals right from the index page.
Priority	Dropdown with three options: High, Medium, and Low	The deal board can be customized to show color-coded dots to represent priority (red for high, yellow for medium, and green for low). The deal board can also be sorted by priority to bring the highest priority deals to the top.

Easily Confused Deal Properties

NAME	DESCRIPTION	NOTES
Forecast amount Weighted amount	Easily confused number properties	Both properties are calculated by multiplying the “Amount” property and a probability. “Forecast amount” uses “Forecast probability” (another deal property), while “Weighted amount” uses the deal probability of the pipeline stage the deal is in. In general, HubSpot recommends using “Weighted amount” when viewing individual deals or the forecast tool. “Forecast amount” works well as a filter when building a custom report.
Latest source Original source type	Easily confused sources	Both properties pull the “Original source” from an associated contact. “Latest source” pulls the value from the contact associated with the most recent session activity for the deal. “Original source type” pulls the value from the contact with the earliest activity for the deal. I don’t know why one has “type” in the name and the other doesn’t, and I don’t know why one is labeled a dropdown and the other is labeled a number. Near as I can tell, the possible values in each are identical.

Tricky Deal Properties

NAME	DESCRIPTION	WHAT'S TRICKY ABOUT IT
Close date	Date the deal was closed (won or lost)	The close date is not set or updated in the following scenarios: • A deal is closed via bulk update on the deals index page. • A deal moves to a closed stage in the forecast tool. • A workflow created the deal but did not specify a close date. • A workflow or the Deal API was used to update the Deal stage property, but not the Close date property.
Recurring revenue amount Recurring revenue deal type Recurring revenue date Recurring revenue inactive reason	• Number • Dropdown with four options: New business, renewal, Upgrade, Downgrade • Date of expiration/renewal • Dropdown with four options: Churned, Renewal, Upgrade, Downgrade	These properties only appear by default if you have Sales Hub Enterprise. Otherwise, you have to create them manually.
Entered Stage Entered Stage Date Time in Stage	True/False Date Duration	These properties don't appear on individual deals but are accessible in the single-object report builder. There's one property for each deal stage (plus a "Time in Stage" property for All Stages).

TICKET PROPERTIES

TICKETS PLEASE. TICKETS.

Really Useful Ticket Properties

NAME	DESCRIPTION	NOTES
Priority	Dropdown with three options: High, Medium, and Low	The ticket board can be customized to show color-coded dots to represent priority (red for high, yellow for medium, and green for low). The ticket board can also be sorted by priority to bring the highest priority tickets to the top.
Time to first response SLA due date Time to close SLA due date	Date properties	These properties give the date and time that a ticket needs to be responded to or closed in order to stay within your SLA. You can use these properties as enrollment triggers for workflows that automatically increase the priority of tickets that are due soon. (NOTE: You have to have Service Hub Professional to set SLAs.)
Ticket tags	Multiple checkboxes	If you’re using the automatic ticket tagging feature (and you should!), any tags that apply to a particular ticket will be listed in this property. You can then use your tags in filters, workflows, and reports.

PROPERTIES YOU SHOULD CUSTOMIZE

BECAUSE SOMETIMES THE DEFAULTS ARE WRONG

Properties to Customize

NAME	OBJECT	TYPE	PROBLEM	ADVICE
Buying role	Contacts	Multiple checkboxes	Roles might not match your customers' actual behavior and organization	Add, remove, and rename options. (Or just scrap the property and use association labels instead!)
Closed lost reason	Deals	Text	Text properties might make for interesting reading, but they're useless for reporting.	Change to multiple checkboxes or dropdown select
Country/Region	Contacts Companies	Text	Typos and abbreviations	Change to dropdown select
State/Region	Contacts Companies	Text	Typos and abbreviations	Change to dropdown select

NOTE: Changing the property type is much harder if the property already has data in it, but it can be done! Here are written instructions (using countries as an example), and here's a video tutorial (using close lost reasons as an example, which I change to a dropdown property, but the process is the same to create multiple checkboxes if that better suits your process).

PROPERTIES YOU SHOULD CREATE

BECAUSE THE DEFAULTS DON'T COVER EVERYTHING

Properties to Create

NAME	OBJECT	TYPE	USE CASE
Additional owners (h/t Cristhian Rosillo)	Various	HubSpot user	If you're company assigns records multiple owners (sales owner, customer service owner, etc.), you can create custom owner properties for each of these.
Is spam (h/t Connor Silvensky)	Contacts	Single checkbox	Enable your team to easily tag contacts as spam and filter them out of views, reports, and lists.
Last updated [property_name] (h/t Casey Drake)	Various	Date	For any property you update regularly (for example, Lead Status), you can create a date property to say when it was last updated (for example, "Lead status last updated"). Create a workflow to stamp the date.
Legacy create date (h/t Will Smith)	All	Date	If you're migrating to HubSpot from another system, you can create a date property to store "Create date" values from the previous system. For example, if you're migrating from Jepsosoft CRM, you can create a property called "Jepsosoft Create Date" and import "Create Date" values there.
Presentation Date	Deals	Date	If a presentation or demo is a vital part of your sales process, you can create a date property for it and make it required at the presentation/demo stage of your deal pipeline.