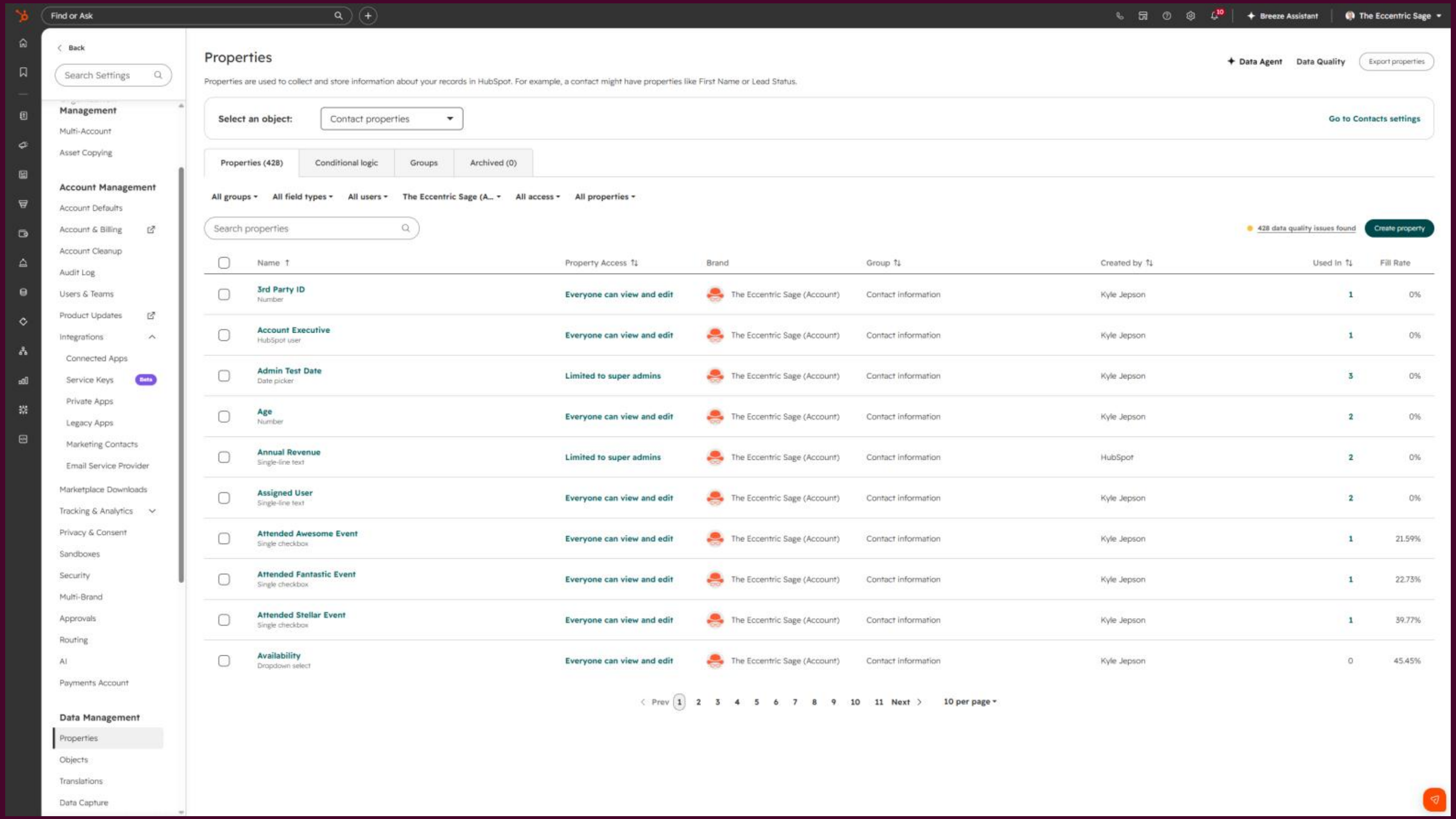
THINGS EVERY HUBSPOT ADMIN NEEDS TO KNOW

Properties Cheatsheet



Last updated: **September 2026**

START HERE

Property basics

Properties are the fields that store information on HubSpot records. Every object Every object has standard properties, and most objects also support custom custom properties.

Use a property when...

Users can enter (or at least view) values, and you want to be able to filter, report, or report, or automate the data.

Skip a property when...

You need an immutable record of something that happened (use an event) or you want to include general, unstructured information (use a note).

Admin rule of thumb

Provide as much structure as you can in the design of your properties. If the data can be organized into set options (dropdown, checkboxes, etc.), don’t settle for free text!

Where admins manage properties

1. Settings → Properties
2. Select an object
3. Search and sort the property table
4. Create custom properties as needed

01

The property editor

- Details, field type & documentation
- Rules, access & sensitive data
- AI-assisted setup with Data Agent

The create-a-property screen, section by section

1 **Details** Label, internal name, object, group. (Also brand, if you’re using Brands.)

2 **Field type** How the value is stored and displayed (more details on this in the next section).

3 **Documentation** Description and data-entry instructions. (The old “description” field now lives here.) Improves results for users and AI.

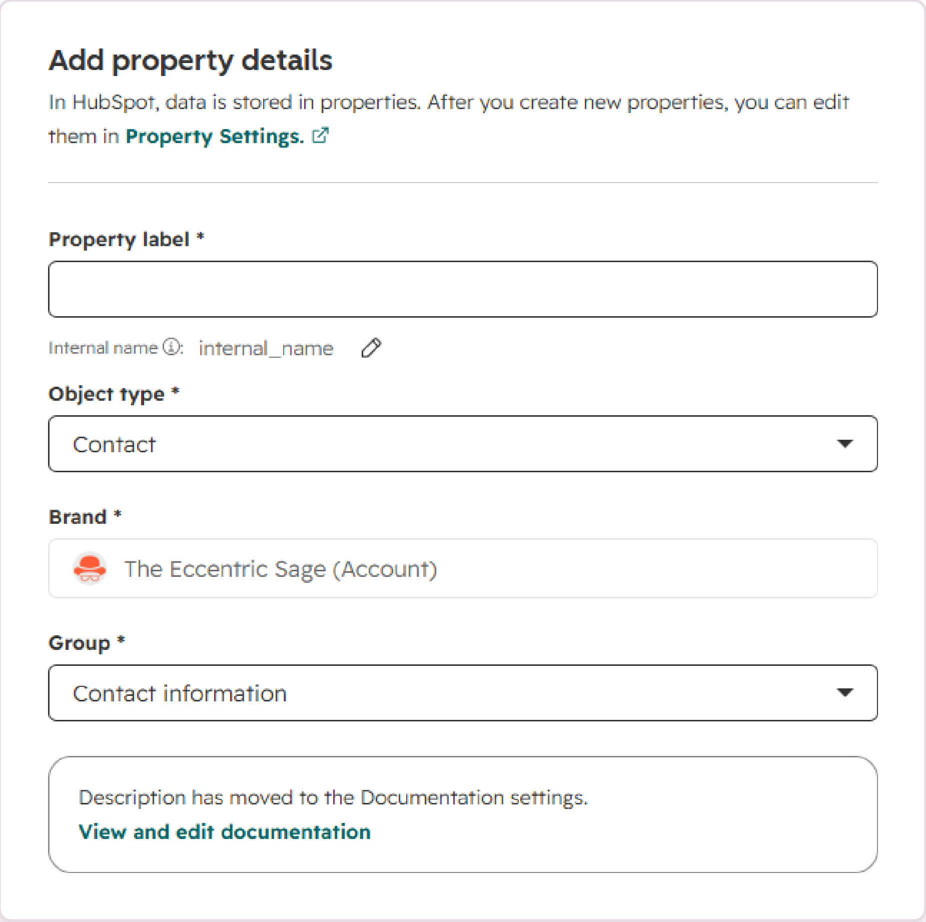
4 **Rules** Validation, forms/chatflow visibility, and global search.

★ **Sensitive data** Sets the protection level (if you have Sensitive Data enabled in your account).

6 **Manage access** Controls who can view or edit the value.

7 **Preview** Try sample values to see how the field behaves before you save.

8 **Data Agent: Smart property + Auto-fill** Generate and fill values automatically (covered later).



02

Field types

- What each type stores and is best for
- The gotchas that trip admins up
- Which types work in forms

FIELD TYPES

Five groups to reason about

1 Text

Single-line · Multi-line · Phone · Email

Free-form strings and formatted contact details.

2 Choice / enumeration

Single checkbox · Multiple checkboxes · Dropdown · Radio

Controlled option lists (love these!)

3 Date & time

Date picker · Date and time picker

Two behaviors that are easy to confuse.

4 Numeric & calculated

Number · Calculation · Rollup

Measured values and values derived by logic.

5 Advanced / specialized

Property sync · HubSpot user · URL · File · Rich text

Everything else, each with its own rules.

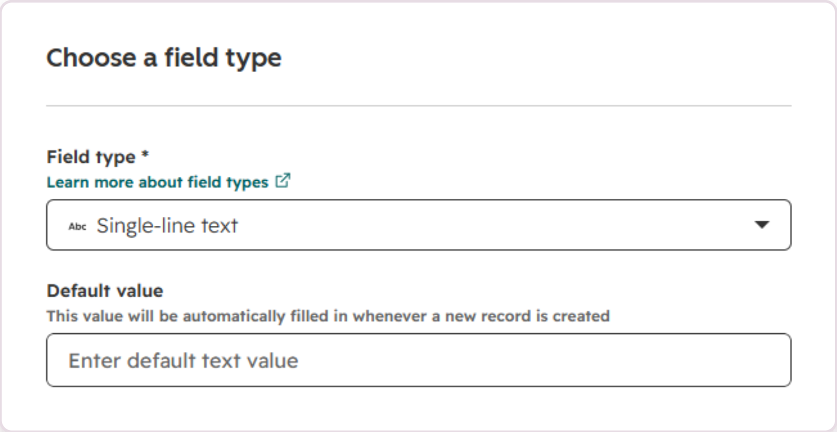
Good to know

The property editor changes with your subscription subscription and the field type you pick, so you won’t you won’t always see every section or every type. type. Calculation, rollup, and property sync require require Professional or Enterprise.

FIELD TYPES

Text fields

Type	Stores	Notes for admins
Single-line text	A single string	65,536-character limit when entered in the CRM (no limit via a form). Tempting for values that should be controlled options.
Multi-line text	Longer strings	Same 65,536-character CRM limit. Line breaks aren’t supported in some tools (marketing emails, quotes, sequences).
Phone number	Phone values	HubSpot applies formatting and validation based on country code.
Email	A validated email address	Allow or block domains. A custom Email field validates format and stores an address. It doesn’t make that address emailable from HubSpot.

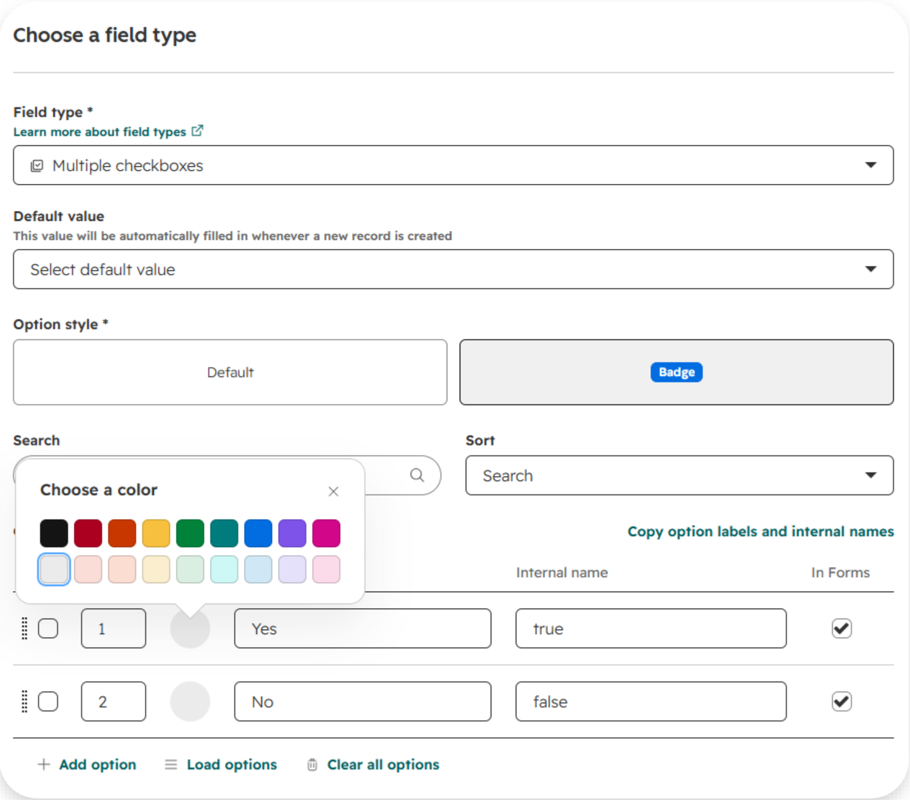


Enumeration fields

Type	Behavior
Single checkbox	Boolean values (true/false). Shows as one checkbox in forms.
Multiple checkboxes	Users can pick more than one option.
Dropdown select / Radio select	Users can only pick one option.

Multiple checkboxes, dropdown, and radio share option limits:

- Up to 3,000 characters per option
- Up to 512,000 bytes or 5,000 options total (whichever comes first)



FIELD TYPES

Date picker vs. date and time picker

Date picker

Stores a calendar date only.

Use for renewal dates, birthdays, expirations. expirations. Safer for forms and simpler filtering. filtering.

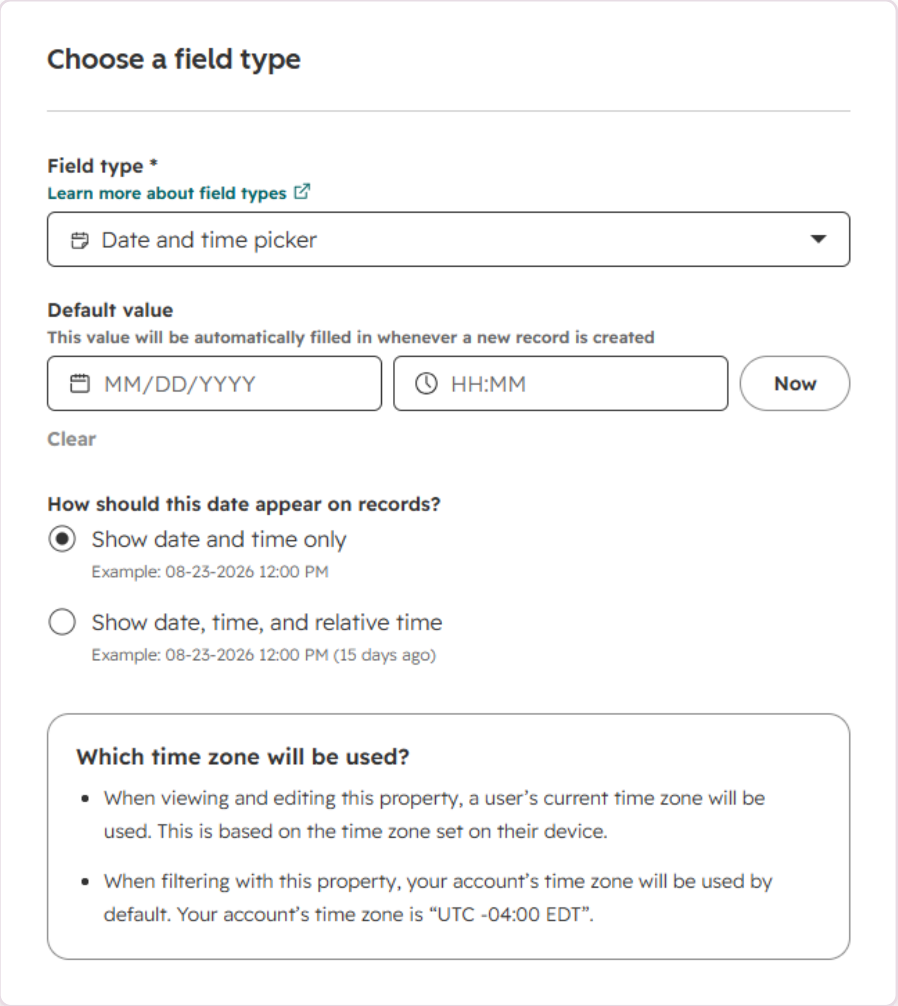
Date and time picker

Stores a date and a time.

Use for precise due times or event moments. Not available in the updated form builder.

Important Note About Time Zones! Viewing/editing a date-and-time value uses the user's device time zone; filtering uses the account time zone by default. Copying a date-only value into a date-and-time field defaults the time to midnight UTC — which can display the day before for some users.

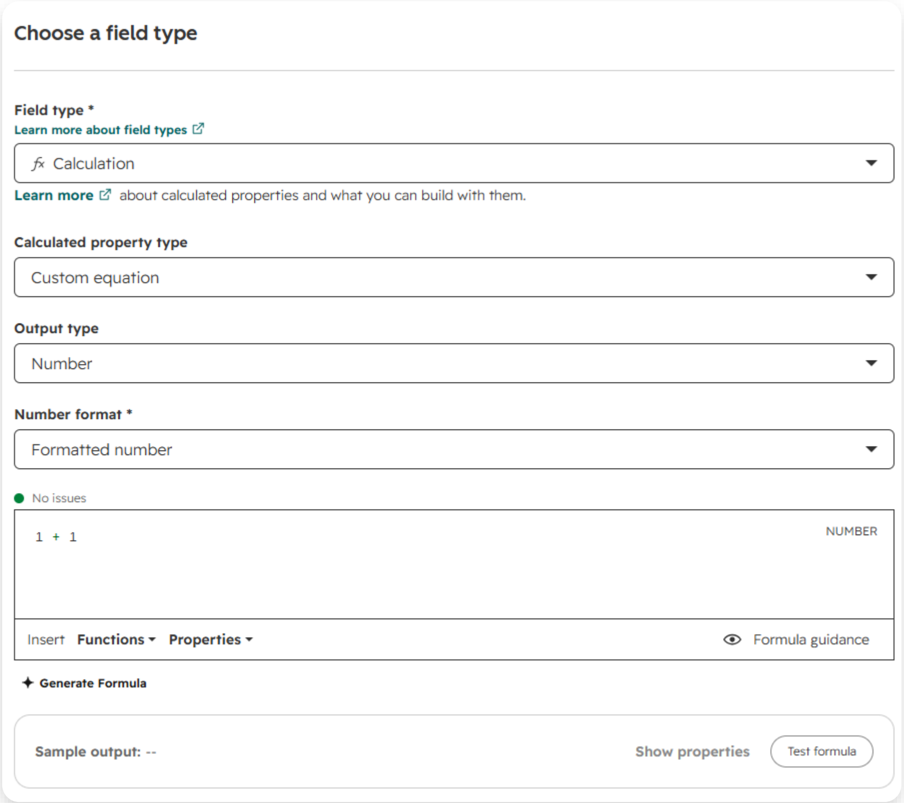
Troubleshooting Tip: If a date looks off by one day, first check whether the source property is date-only property is date-only or date-and-time.



FIELD TYPES

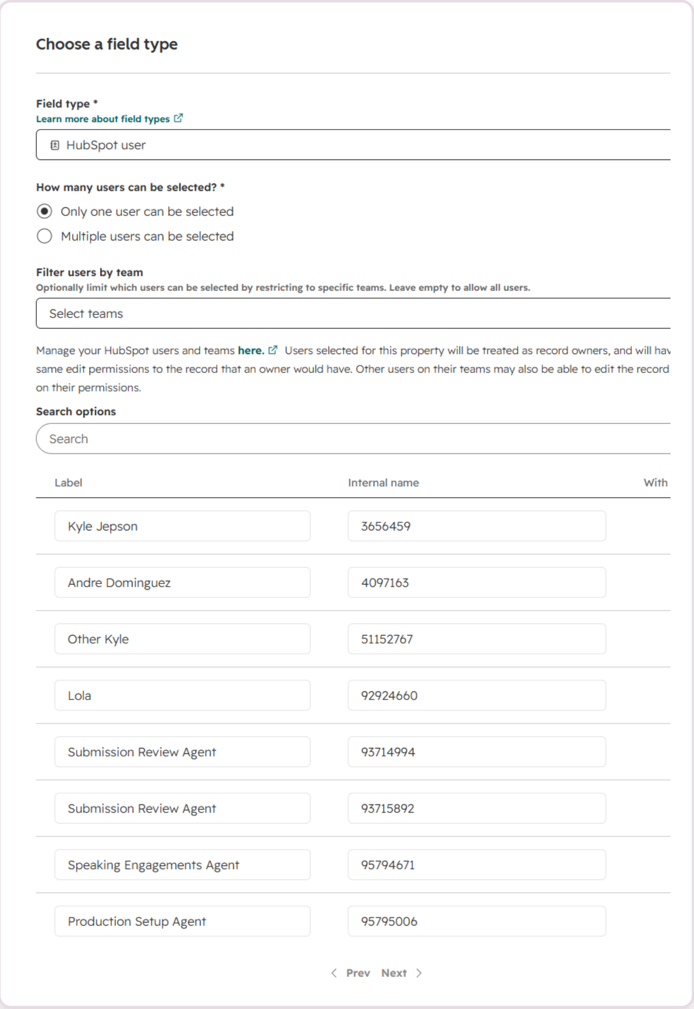
Number & calculation

Number formats	What it does	Sample Value	Admin Notes
Formatted	Displays with separators.	1,000,000	Separator determined by the “Date, time, and number format” option in each user’s personal settings.
Unformatted	No separators	100000	Best for large numbers
Percentage	Stores a decimal but a percentage.	Displayed as: 75% Store as: 0.75	
Currency	Formats using your account’s currency settings.	$100.00	



Other field types

Type	What to know
Property sync	Mirrors a value from a property on an associated record; updates automatically. Pro/Enterprise.
HubSpot user	One or many users; acts like an extra owner field (selected users get owner edit rights). Up to 250 per object. Not in forms. NEW: Property can display only the users on a specific team (or multiple teams)!
URL	Stores a link, auto-appends https://, supports default link text and allow/block domains. Not in forms. NEW: Editable link text!
File	Up to 10 files; 20 MB (free) / 50 MB (paid) on records, 100 MB via form. Set visibility to private or public.
Rich text	Formatted text, lists, and images (max 64 KB incl. images). Not in forms.



THE DISTINCTION THAT SAVES ADMINS

Calculation vs. rollup vs. property sync

Calculation

DERIVE FROM LOGIC

Computes a value from other properties on the same object, or from time logic (time between/since/until), or a custom equation.

Examples Days since last contact, a custom score, a score, a status from a formula.

Rollup

AGGREGATE ASSOCIATED RECORDS

Summarizes values across associated records: Min, Max, Count, Sum, or Average.

Examples Count of associated contacts, sum of associated deal amounts, latest related date.

Property sync

COPY ONE RELATED VALUE

Mirrors a single property from one associated record. If several could qualify, you pick first/last associated (or by label).

Examples Company Industry synced onto a deal, a related territory field.

A Note on Custom Equations: Calculations can output Number, Boolean, String, Date, or Date Time, and uses properties from the same object from the same object only. NEW: Calculations can output an enumeration, in which case the outputs must match option internal names. internal names.

FORMS

Which field types work in forms

Work in forms

- ✓ Single-line text
- ✓ Multi-line text
- ✓ Phone number
- ✓ Single checkbox
- ✓ Multiple checkboxes
- ✓ Dropdown select
- ✓ Radio select
- ✓ Date picker
- ✓ Number
- ✓ File
- ✓ Email

Don’t design for forms

- ✗ Date and time picker
- ✗ Calculation
- ✗ Rollup
- ✗ Property sync
- ✗ HubSpot user
- ✗ Rich text
- ✗ URL
- ✗ Custom email as a send-to field

03

AI & smart properties

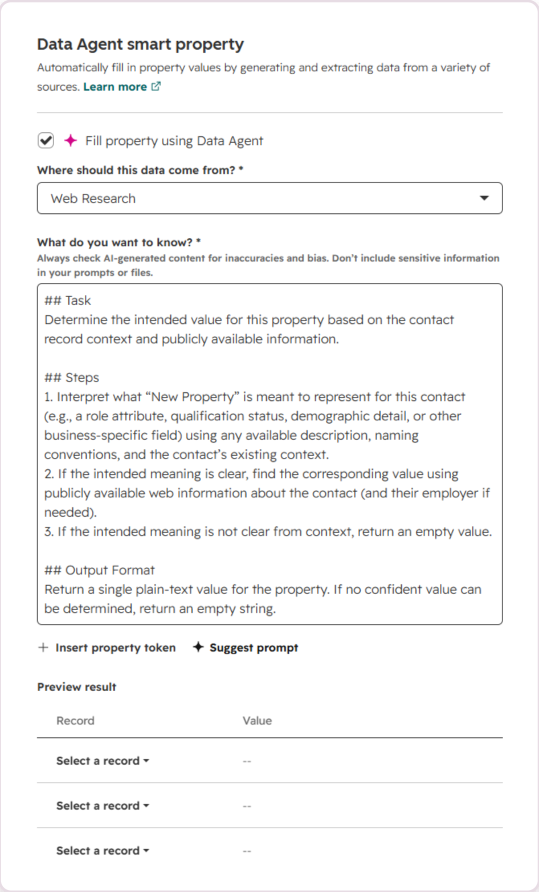
- Smart property prompts
- Auto-fill
- Always review AI-generated values

Smart properties with Data Agent

Instead of a person entering the value, Data Agent generates and fills it for you.

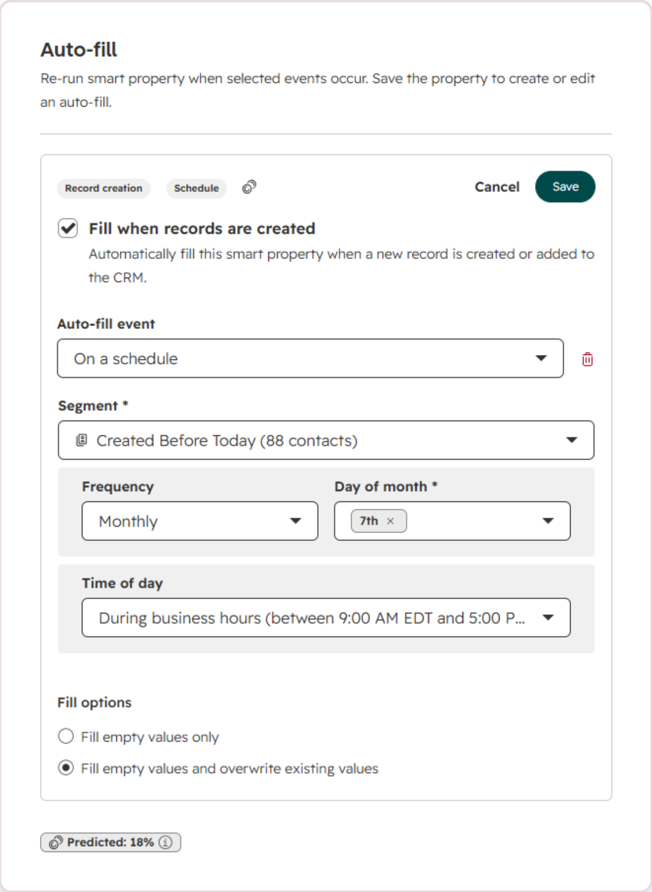
Smart property prompt

Turn on **Fill property using Data Agent**, **Agent**, choose a source (e.g. web research research or CRM context), then describe describe what you want to know. Preview Preview results on real records before saving.



Auto-fill

Data Agent can automatically fill values on a schedule or when records are created. You decide whether it will empty values only or overwrite existing ones.



04

Properties worth knowing

- Lifesaving default properties admins lean on
- Easily confused properties
- Recommended custom properties

Contact properties

Lifesaving default properties

Property	Why it's useful
Record ID	The record's unique identifier — the reliable key for imports, APIs, and troubleshooting.
Record source + Record source detail 1–3	How the contact was created, with three levels of increasing detail. The modern successor to original-source drill-downs.
Email hard bounce reason	The last reason a marketing email hard-bounced — useful for deliverability troubleshooting and exclusion lists.
Email address quarantined	Flags an address quarantined for anti-abuse reasons; HubSpot won't send marketing email to it.
Marketing contact status source type / source name	The tool that last set marketing-contact status, and the ID of the specific activity behind it — great for auditing how contacts become marketing contacts.
Marketing contact until next update	Shows contacts queued to become non-marketing on the next update date.

Often interchanged

These two…	…differ because
Number of sales activities vs. Number of times contacted	Sales activities counts everything logged (incl. notes & tasks); times contacted is narrower and excludes notes & tasks.
Last engagement date vs. Sends since last engagement	One is a timestamp of recent engagement; the other is a marketing-email pressure metric — how many sends since that engagement.

Recommended custom properties

Property name	Description
Contact type	A finer cut than Persona or Lifecycle stage for targeted outreach.
Full name	One field to simplify forms (split back to first/last with a Data Hub workflow).
Contact type	Attribution helper captured via query strings and hidden form fields.
Full name	Persona, role, or fit markers used in routing and AI workflows.

Company properties

Lifesaving default properties

Property	Why it's useful
Company domain name	The company's website domain — the key identifier for deduplication, automatic contact association, and enrichment.
Number of associated contacts	See contact counts at a glance in views and lists; spot companies with more contacts than expected.
Number of form submissions	Total submissions by all associated contacts — handy as engagement input for a score.

Recommended custom properties

Property name	Description
Account status / ABM stage	Where an account sits in your buying process.
ICP fit or tiering	Strategic prioritization for account-based work.
Partner / service classification	How teams segment accounts operationally.

Deal properties

Lifesaving default properties

Property	Why it's useful
Deal type	Categorize deals (New Business / Existing Business by default) for cleaner pipeline reporting.
Number of sales activities	Total activities logged on the deal — track rep productivity and build activity-based lists.
Priority	The level of attention a deal needs — sort views and trigger reminder workflows.

Often interchanged

Property	What it means
Amount	The deal's total value in the deal's own currency (with multi-currency enabled).
Amount in company currency	The same value converted into your company currency, using your account's exchange rates.
Weighted amount	Amount × Deal probability — the probability set by the deal's current stage.

Recommended custom properties

Property name	Description
Deal source	Where a deal originated, for teams working out of the deal object.
Industry (via property sync)	Sync the associated company's Industry onto the deal.
Deal health / approval / complexity	Process nuance beyond deal stage alone.

Ticket properties

Often interchanged

Property	Why it's useful
First agent email response date	When an agent first replied — report on response time and support efficiency.
Time to close SLA ticket status	Active SLA, Due soon, Overdue, or completed on time / late. Appears only when SLAs are configured.
Resolution	The action taken to resolve the ticket — report on common resolutions (a good FAQ/KB starting point).

Recommended custom properties

Property name	Description
Ticket type	Categorize cases for reporting and, by tier, routing to specific reps.
Due date	An operational deadline separate from SLA-driven dates.
Industry (via property sync)	Need company context on the ticket? Sync Industry from the associated company.