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you're human



HubSpot users with permission to add and edit users can customise permissions for new and existing users. You can limit editing access to specific properties, assign content access to particular users, and learn how to update user permissions using the Users & Teams settings. Please note that changes will not take effect until users log out and back in. When HubSpot adds new permissions, existing users will retain their current access with any new permissions automatically enabled. On the CRM tab, you can set permissions for CRM objects and tools. To manage conversation inbox permissions, refer to the documentation on creating a conversations inbox. You can customise permissions for CRM objects such as Contacts, Companies, Deals, Tickets, Tasks, CRM emails, Meetings, Calls, Notes, and Custom objects. For each object, you can select from View, Edit, Create (BETA), Delete, or Merge (BETA) permissions. Users need bulk delete permissions for index pages. Learn about different seat types and what they offer. Users with Edit permissions can remove activities from records, so you must take away their Edit permissions if you don't want them to have this ability. Those with View permissions can still create notes or tasks on relevant objects. To edit notes or tasks, associate activities, or create new ones, users need Communicate permissions. View-only Seat holders can log CRM record notes, but require Communicate permissions for HubSpot mobile app note-taking and task-creation. Ownership permissions are tied to default owner properties and custom user fields. Users set as owners have access to the record. Team-owned object permission holders can view records owned by their assigned team members. CRM Tools allow customization of bulk actions, property settings, and workflows. Communicate: control which objects a user can log emails, calls, or meetings for by selecting All records, Records they own, Records their team owns, or None. When choosing Records they own or Records their team owns, you can toggle the Unassigned checkbox to allow communication with unassigned contacts and companies. This only applies to CRM emails, not marketing emails. Learn more about setting marketing email permissions. Bulk delete: toggle on to enable bulk deleting of contacts, companies, deals, tickets, and tasks. Users without this permission can still delete records individually if they have Edit permissions for the object. Leads in the prospecting workspace are also deletable with this permission. Import: toggle on to let users import CRM records in bulk or individually within their HubSpot account. Export: toggle on to allow exporting of CRM records from their HubSpot account. Edit associations: toggle on to enable adding, editing, or deleting record associations. Users must have Edit access for the record when working with associations. Enrich records: toggle on to let users update record properties and add companies using enrichment data from HubSpot (Professional and Enterprise only). Custom views: toggle on to allow users to create, edit, and delete custom views in their inbox (Professional and Enterprise only). Customize record page layout: toggle on to enable updating the record page content. Permissions for Marketing Tools and Forms The following permissions control access to marketing tools and forms: - To set up marketing publishing tools, users need permissions for CRM objects and have access to all included properties. - Users with Account Access permission can create support forms and connect them to a channel. - Users need Marketing Email Publish permission to edit follow-up emails for forms. - The "Delete form submissions" switch controls whether users can delete individual form submissions. This permission requires editing forms first. - The "Files" switch enables access to view, edit, and delete files in the files tool. - Within the files tool, users can limit access to individual files, folders, or subfolders to specific users and teams. - The "View", "Edit", and "Delete" switches control whether users can review, upload new files, edit file details, and delete files, respectively. - Users with no access to these permissions will not be able to view or interact with the files tool, but they may still see the Files option in navigation bars and have access to the file picker in other editors. - The "Marketing Access" switch controls access to marketing tools such as email tools, contact record activity, and ad account management. - Users can turn on more specific marketing tool permissions when this switch is enabled. - The "Ads", "Publish", "Campaigns", "View", and "Edit" switches control access to ads, campaign management, publishing, and creating CTAs. Give users control over which features they can access in your account: - Toggle the Edit switch to let users create, edit, and delete SMS messages. - Turn on Publish for sending SMS messages. - Enable Lead Scoring for viewing and creating lead scores. - View lead scores without needing edit permissions. - Give users Buyer Intent permissions to configure settings. - Users with All accessible accounts or connected accounts can see all shared social accounts. - Toggle Blog switch for accessing blog content, editing posts, and managing private content. - Turn on Podcasts for viewing podcast content and publishing updates. - Access Case Studies by toggling the switch. *Toggle switches control user access to various content management features.* Landing pages: Enable Landing pages to let users view and edit landing page content. View: Enable View to show users landing page content. Edit: Enable Edit to allow users to create, edit, and delete landing page content. Users cannot update live pages or create new ones. Manage private content: Activate Manage private content to publish private landing pages. Publish: Activate Publish to let users update and publish landing page content. Website pages: Enable Website pages to view website page content. View: Enable View to show users website page content. Edit: Enable Edit to allow users to create, edit, and delete website page content. However, they cannot add new pages or update live pages. Manage private content: Activate Manage private content to publish private website pages. Publish: Activate Publish to let users update website page content. Content Remix: Enable Content Remix to give users access to the remix tools. View: Enable View to review existing content remixes. Edit: Enable Edit to allow users to create, edit, and delete content remixes and remixed content. HubDB (Content: Hub only): Activate HubDB for table customization settings. Users must enable these settings to add data. URL Redirects: Enable URL redirects to view redirected URLs. Publish: Enable Publish to let users edit URL redirects. **Approvals**: Customize permissions to approve content publishing. Approve marketing emails: Toggle switch to let users approve email requests. Approve blog posts: Toggle switch to let users approve post requests. Approve landing pages: Toggle switch to let users approve page requests. Approve website pages: Toggle switch to let users publish web page requests. Sales: On the Sales tab, set permissions for sales tools such as products and templates. Assign paid Sales Hub seats. Toggle switches for different functionalities in the product library and other areas of the platform, allowing users to customize their access and permissions. Toggle Product Library: - Edit: allow users to edit products - Delete: allow users to delete products - Create custom line items: enable users to create line items from deal records or quotes when using the line item editor Toggle Sales: - Access Prospecting Agent (BETA): give users access to configure and use the prospecting agent - Manage payment links: let users manage one-time and recurring payment links - Manage payments and subscriptions: enable users to view transaction history, download reports, send receipts, cancel subscriptions, and issue refunds Toggle Invoicing: - Invoices: give users access to invoices - View: let users view invoices - Edit: allow users to edit invoices Toggle Subscriptions: - Subscriptions: give users access to subscriptions - View: let users view subscriptions - Edit: allow users to edit subscriptions - Delete: let users delete subscriptions Toggle Sales Access: - Sales Access: enable users to access sales templates, snippets, documents, calling, and the meetings tool Toggle Templates: - Templates: give users permission to create, edit, and delete templates Toggle Meeting Scheduling: - Meeting scheduling pages: allow users to create, edit, and delete scheduling pages for other users Access controls allow users to toggle on various features such as delete sequences, manage private content, bulk enroll sequences, view connected record data, and more. The Service tab enables granular permissions for service tools like feedback surveys and knowledge base articles, along with assigning paid Service Hub seats. Users can also access feedback surveys, edit templates, publish and approve knowledge base articles, and schedule meetings by toggling on corresponding switches. Furthermore, permissions for the forecast tool, playbooks, and customer agent editor can be customized to suit individual needs. Additionally, administrators can manage user access to various features such as Sales Workspace, Service Hub, and personal email accounts, all while being mindful of subscription tier limitations. Permissions in Service will also be updated in Sales when the forecast is updated. Sequences: enables users to create sequences when the switch is toggled on. View: allows users to view sequences with the toggle on. Edit: permits users to create, edit, and delete sequences when the switch is turned on. Delete: enables users to delete sequences by toggling the switch. Manage private content: lets users view, edit, and delete private sequences when the switch is activated. Bulk enroll sequences: allows users to bulk enroll multiple contacts into a sequence simultaneously with the toggle on. View connected record data: gives users access to view connected account data using multi-account management when the switch is toggled on. Manage Customer Success Settings: enables creation of shared views, pinning reports for all users, and creating or editing customer health scores by toggling the switch. Automation Workflows: grants access to workflows when the toggle is activated. View: allows users to view workflows with the switch turned on. Edit: permits users to create, edit, and delete workflows when the toggle is turned on. Delete: enables users to delete workflows by toggling the switch. The user must have Edit access as well. Chatflows: lets users create, edit, and publish chatflows in their HubSpot account with the toggle activated. Reporting: grants permissions to create, edit, and view dashboards, reports, and analytics tools when the toggle is turned on. Goals: enables users to view, create, and edit goals by toggling the switch. Data quality tools access: permits non-Super Admin users to access the data quality command center to monitor and clean data quality issues with the toggle activated. Reports Access: grants access to reporting tools including dashboards, reports, and analytics when the toggle is turned on. Dashboard, reports, and analytics: allows users to view, edit, or create and own dashboards and reports with the toggle activated. Reporting datasets: permits users to access reporting datasets by toggling the switch. New Report Features allows users to create custom datasets for creating tailored reports. Marketing Reports can be accessed by toggling the switch, offering analytics tools such as traffic analysis, page performance tracking, and competitor data. Custom Events enable users to view, edit, and remove event data. On the Account tab, administrators can set more detailed permissions for account management. The Settings access allows users to view billing information, company details, transactions, and crucial documents. This permission is also required for purchasing new paid seats or assigning paid seats in the account. Marketing Contacts Access grants users the ability to categorize contacts as marketing-related or non-marketing related. Personal Email Access enables users to connect their personal email accounts for tracking 1:1 emails from the CRM and accessing meeting scheduling pages. App Marketplace Access allows users to install apps from the HubSpot marketplace, although some integrations may require additional permissions. Users can also uninstall apps by toggling the App Marketplace Uninstall Access switch. Template Marketplace Access enables users to install modules and templates from the HubSpot Marketplace. Additionally, users can permanently delete contact records with the Permanently Delete Contacts feature. Edit Property Settings allows users to manage access to object properties, create, edit, and manage pipelines or stages. Custom Data Translations enable users to import, export, or turn on custom translations for their data. Subscription Type settings grant users permission to create, edit, and manage subscription types. HubDB Table Settings allow users to configure table settings, clone, unpublish, or delete tables. Global Content and Theme Settings permit users to edit global content and themes for website pages. Website Settings enable users to update the SEO tool and manage email account settings. Given article text here User settings and permission control for various HubSpot tools are available, allowing administrators to tailor user access and experience. Key settings include: • User table access: Enables viewing of the user table in account settings. • Audit log access: Provides access to audit logs for tracking system changes. • Availability Management: Allows editing team member availability. • Security Center access: Enables management of HubSpot Security Health and security settings. • Breeze Copilot: Offers users the ability to chat with Copilot. User permission levels require subscription-specific licenses, including CMS Hub or Marketing Hub Enterprise. Assets like blog posts and pages can be restricted by teams, while user and account settings require Account Access permissions. Users need specific roles to assign paid seats and manage billing permissions. Additionally, Administrator control includes: • Developer tools access: Allows development features, such as app management and test accounts. • Customer Portal settings: Enables editing of customer portal settings and Publish access. • Reports and dashboards: Offers full analytics tool access and overrides reports permission. • Domain settings: Connects and edits domains for user-specific configurations. Note that some users may require additional permissions to perform specific tasks, such as building private apps. Groups let you control access, filter reports, and more by setting limits on teams. You can toggle Limit access by teams on to allow users to share assets with others. Users with this permission get access to all assets regardless of their team membership. Presets lets you configure account settings like home screen, dashboard, language, and more for your users and teams. Edit account defaults allows you to set up account-wide settings such as name, branding, new user defaults, language, time zone, data privacy, and default date and number format. If you're on a Professional or Enterprise plan using multiple currencies, you need to be a Super Admin to change the default currency. Additionally, note that Super Admins are required to access private apps. For Marketing Hub subscribers, an in-app banner will appear when you've reached 98% of your Marketing Contacts tier limit. To remove this banner, you must toggle off Modify billing and change name on contract permissions. As a Super Admin, you get access to all account tools and settings outlined in this article, except for paid Sales or Service Hub features which require separate seats. The key difference between a Super Admin and a user with all permissions is that Super Admins can do virtually anything in the account; users with all permissions may not have access to certain features outside of the scope of the permissions panel. If a task requires a Super Admin, it's recommended to have an existing one complete it instead of updating individual user permissions. To set a user as a Super Admin: Click settings icon > Users & Teams > hover over user record > click Actions dropdown menu and select Make Super Admin. Partner admins are only granted to HubSpot Solutions Partner employees working in your account, with similar access to Super Admins. Note the differences in the table below: 1. Partner Tools Switch On To grant users in a partner account access to partner tools, the Partner Admin switch must be toggled on. 2. Partner Admin Role Toggle this switch to enable verified Partner employees to manage your account and add or edit other Partner employees. 3. Partner Client Object Toggle this object switch to allow users to view their HubSpot clients' data and collaborate with HubSpot. 4. User Views This option lets the user view only their own HubSpot clients' data. 5. User Edits With this option, the user can edit their own HubSpot clients' data. 6. Partner Services Object Toggle this object switch to enable users to access their HubSpot client service data and collaborate with HubSpot. 7. User Views Service Data This option allows users to view only their HubSpot client service data. 8. User Edits Service Data With this option, the user can edit their own HubSpot client service data. 9. Partner Tools Access Toggle this switch to give users access to partner tools. 10. Partner Dashboard Access Toggle this switch to grant users access to view and manage the partner dashboard. 11. Partner Commission Access This toggle enables users to access payment information in the Partner Commission App. 12. Client Access Manager Toggle this switch to allow users to manage their employees' client account access from one place. 13. Solutions Directory Edit With this switch, users have edit access to the Solutions Directory.

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