Value-First Contract

HubSpot's own Contract object

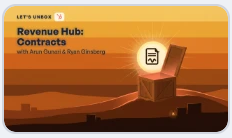
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

One Contract holds one agreement with a customer: what was agreed, for how long, and how it is billed.

We use Contracts as HubSpot ships them, with no field of our own. A record names both sides: the customer's company and people, and the seller's details.

Why use Contracts?

> "If you have any kind of post-sales revenue goals … you will get value out of using contracts."



Chris Carolan, Unboxing HubSpot Revenue Hub: Contracts, 3 September 2026

Try it in your portal

Let a quote make the Contract. Switch on "Create contract records from accepted quotes". With your billing setting on, the first invoice goes out at once. Settings › Data Management › Objects › Contracts. Revenue Hub Professional or Enterprise; Super Admin.

Keep a Contract without billing. Switch Billing off when you create it, and it holds the agreement while you bill another way. Revenue › Contracts › Add contracts › Create new. Any plan; a beta a Super Admin turns on first.

Whose value does it serve?

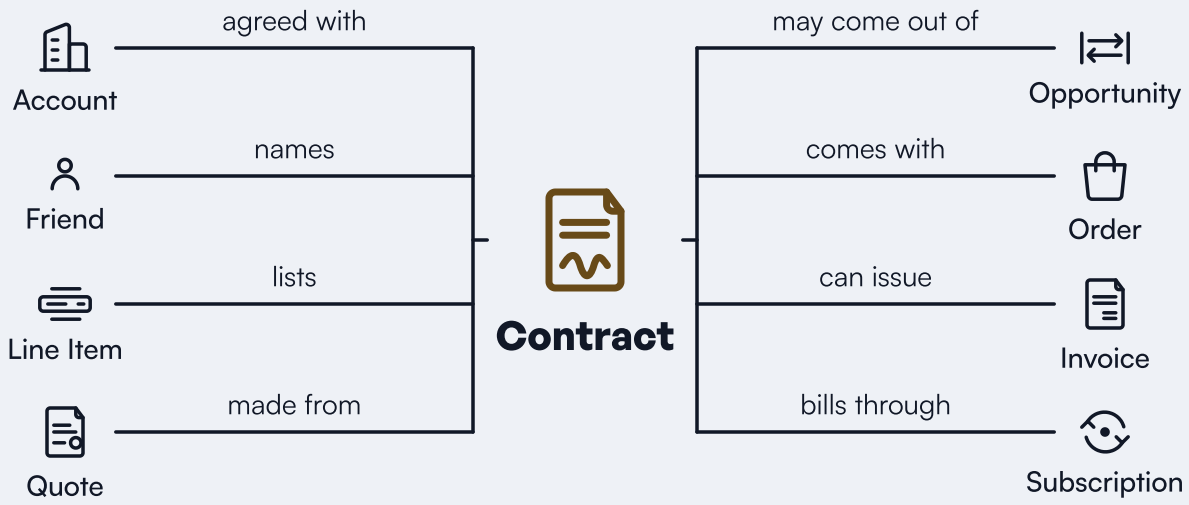
Value for the Company

That means our own organization. A Contract holds one agreement's commitments on one record, beside what has been billed and paid against them.



Checked against our HubSpot portal and our written method on 9 November 2026

What links to a Contract?



Friend is HubSpot's Contact. Also linked: renewals, credit memos, projects, tasks, notes and more. Payments arrive through invoices.

How does a Contract change?

A Contract has no stages. HubSpot marks whether it is in effect: draft, active, completed or terminated. A renewal is a new Contract, linked to the one before it, never a change to the old one.

What is a Contract not?

Not the sales conversation. That is the Opportunity. A Contract can exist with no Opportunity behind it.

Not seen by customers. They receive quotes, invoices and receipts, never the Contract.

Not a legal contract. HubSpot says its contracts do not replace signed legal agreements.