Value-First Invoice

Invoice in HubSpot

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

Each Invoice is one bill: an amount asked of a named person or company, under something already agreed.

It records what we asked for, never the money. What actually arrived is kept on its own record, a Payment.

What does “billed” mean?

> “[Billed] is an invoice. Did something go out that is allowed to be paid against …”
>
> Chris Carolan, Hubsessed Office Hours: Unified Revenue View, 1 October 2026

Try it in your portal

Check paid against payments. Add Amount paid and Balance due beside Invoice status. Amount paid counts non-failed payments, so a bill marked Paid with no payment behind it stands out. More › Revenue › Invoices › Edit columns. All plans.

Mark teaching records. Add a dropdown that marks each bill real or teaching, so examples never count as real value (ours: Lived or Illustrative). Settings › Properties › Invoice properties › Create property (Dropdown select). All plans; limits vary by plan.

Find late bills by age. Filter invoices by Age category, such as 90+ Days. Days overdue is stored as a date and shown as a relative date, not a count of days. More › Revenue › Invoices › Advanced filters. All plans.

What do we keep about an Invoice?

Nearly all of it is HubSpot’s own. Beyond that, we keep:

Lived or Illustrative. Whether a bill is real, or an example made to teach. An example can never be the source of a value claim.

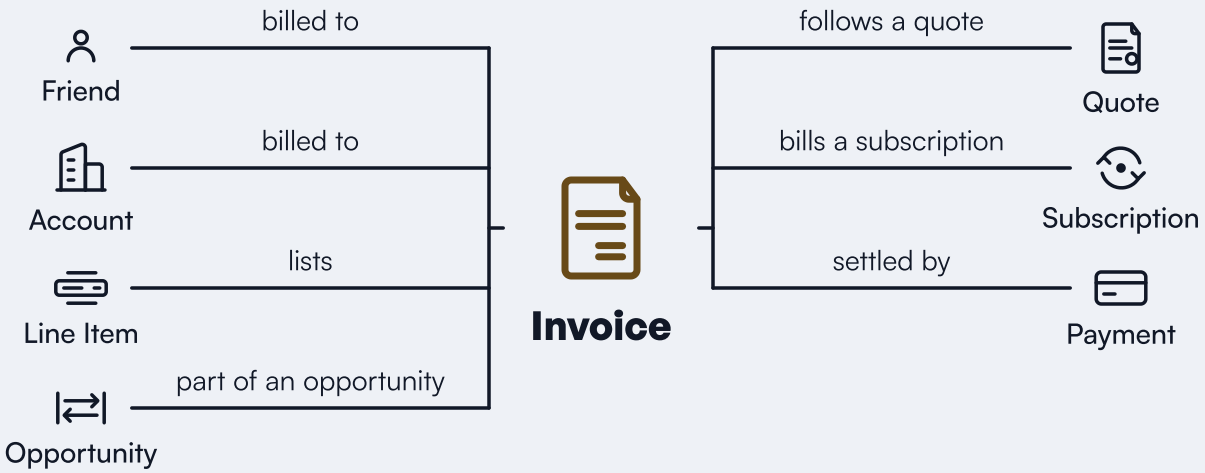
Whose value does it serve?

Value for the Company

That means the organization doing the work: its people, its capability, its ability to keep going. In our method, billed (the invoice) is one of four statuses, with booked, earned and paid; they can be true together.



What links to an Invoice?



Also connected, though not drawn: contracts, orders, payment links, payouts, projects and more.

How does an Invoice change?

An Invoice has a status, HubSpot's own: Draft, Open, Paid or Voided. It does not move through steps. A voided bill stays on the record, and payment can no longer be collected on it.

What is an Invoice not?

Not the agreement. The agreement is its own record, and one agreement can make many invoices.

Not proof the work was done. Our method keeps billed and earned apart. Even a paid bill does not show the promise was kept.