Value-First Line Item

HubSpot's own Line item, under its own name

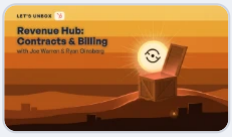
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

Most Line Items hold one product or service on one Opportunity, quote, order, invoice or subscription, as agreed.

That means what it is, how many, at what price and how often. For us, lines record what we sell: workshops, consulting calls, apps, and subscriptions to our publication.

Why the line?

> "The line item is the atomic entity … The contract is just the container …"



Ryan Ginsberg, Let's Unbox: Unboxing Revenue Hub - Contracts & Billing, 4 August 2026

Try it in your portal

Put per-sale facts on the line. Make a per-sale field on lines, not products: a product field is copied onto every line and cannot be modified there. Our field is kind of work. Settings › Properties › Line item properties › Create property. All products and plans.

Mark teaching examples. Add a dropdown with two options, real or example, so a line made for a demo or a lesson is never read as a real sale. Same place: Settings › Properties › Line item properties › Create property. All products and plans.

What do we keep about a Line Item?

Beyond HubSpot's usual price and product details, we keep:

Kind of work. What the line pays for, from about two dozen kinds, such as workshops, consulting calls, apps and implementations.

Real or example. Whether it records a real exchange or a teaching example, which is never the source of a claim that value was created.

Whose value does it serve?

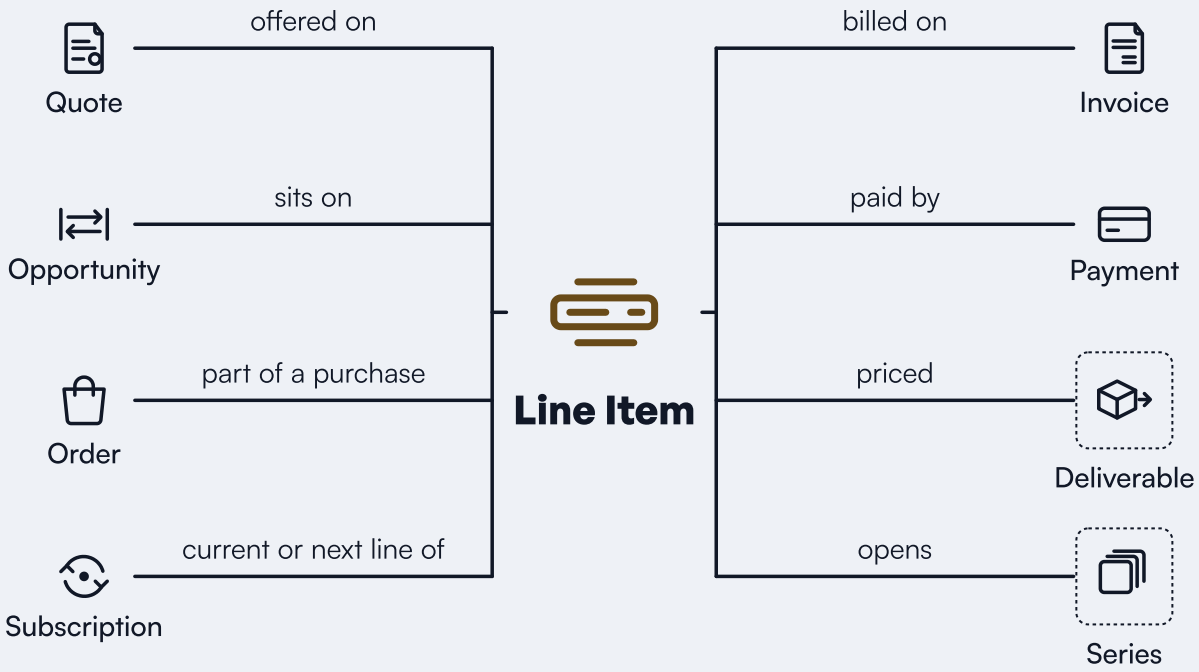
Value for the Company

That means the organization doing the work. Each line records the price of one thing we promised, and the promise is followed as booked, billed, earned and paid: statuses, not steps.



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

What links to a Line Item?



Dashed frames mark our own custom objects, which need an Enterprise subscription in HubSpot.

A line can link to the Deliverable it priced; a subscription's line can link to the Series (show or publication) it opens.

Also connected, though not drawn: payment links, discounts and contracts. Most lines also name the product they came from.

How does a Line Item move with us?

It has no stages. A line is written when something is agreed, and changing it changes the agreement. What moves is the Opportunity, quote, invoice or subscription it sits on.