Value-First Order

Order in HubSpot

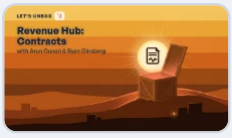
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

An Order records one purchase from us once it is agreed, and how far it has got.

In our portal that means someone signing up for a course or certification, or a client's engagement with us, such as a retainer or coaching.

What is an order record?

> "...the contract will come with an order that needs to be fulfilled eventually ... Why does it show up?"



Ryan Ginsberg, Unboxing HubSpot Revenue Hub: Contracts, 3 September 2026

Try it in your portal

Mark demo orders. Instead of a new pipeline, add an Order dropdown: real purchase or teaching example, so test orders never count as value. Settings › Properties › Order properties › Create property, field type Dropdown select. All plans.

Split recurring orders. If recurring orders go through different steps, give them their own Order pipeline, as ours has Active Cycle and Invoiced. Settings › Data Management › Objects › Orders › Pipelines tab › Create pipeline. Starter or above.

What do we keep about an Order?

Beyond HubSpot's usual order details, we keep:

Real or teaching example. Whether it is a real purchase or a teaching example, so demo and test orders never count as value.

How often it bills. One time, monthly, quarterly or yearly.

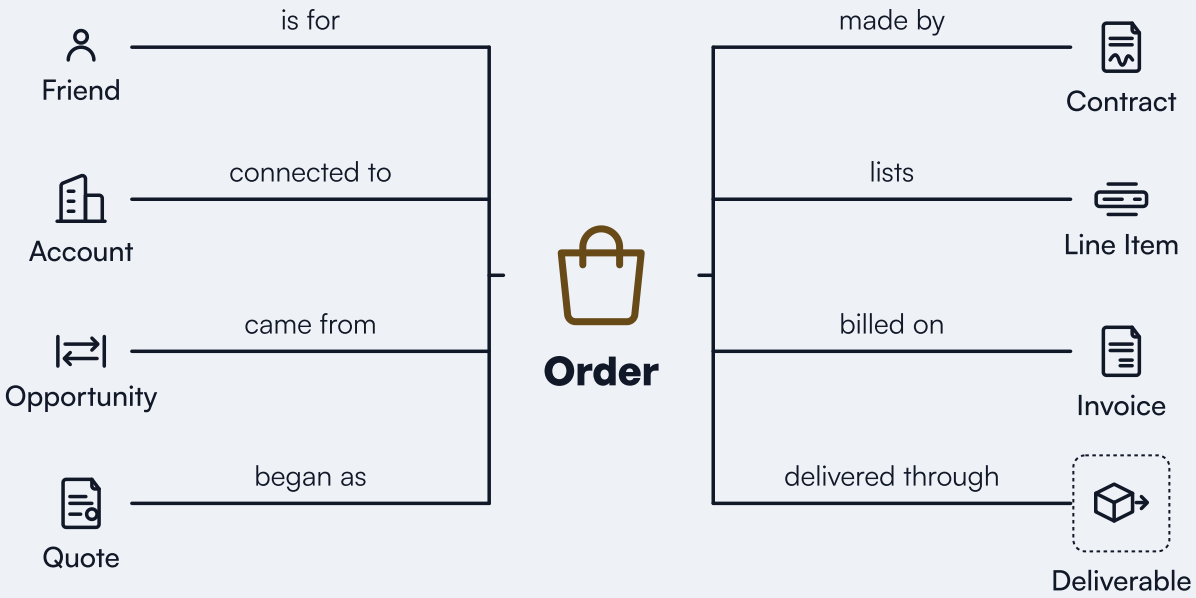
Whose value does it serve?

Value for the Company

That means our own organization. We can see what was agreed and how far it has got, through delivery, further orders and renewals. A paid Order is not proof that value landed.



What links to an Order?



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

A Deliverable is each piece of work we deliver under an Order; the Order itself holds the purchase.

Also connected, though not drawn: payments, subscriptions, services, notes, calls, emails and more.

How does an Order move with us?

One-time Order · 1 of 4 pipelines shown

Order Received	Order Confirmation	Processed	Shipped	Delivered	Value Activated	Cancelled

Stages show how far a purchase has got, not where a person is on their path. Recurring orders have their own pipeline: Order Received, Order Confirmation, Active Cycle, Invoiced, then Cycle Settled or Cancelled.