# Value-First Order

Order in HubSpot

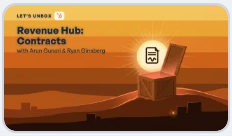
How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

## 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

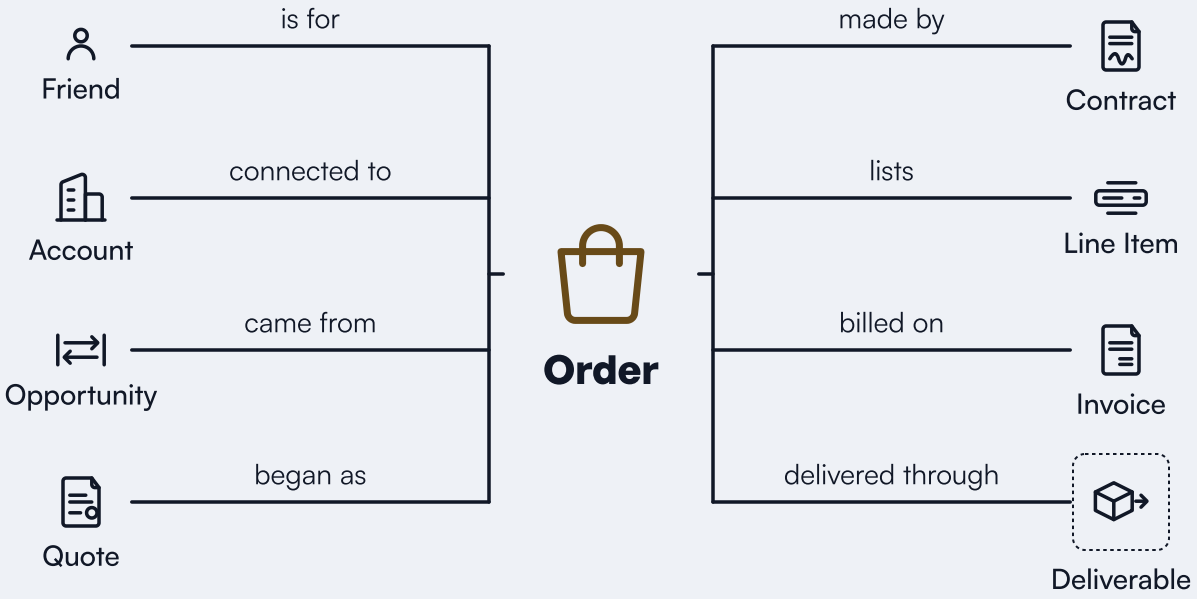
That means our own organization. We can see what was agreed and how far it has got, through delivery, further orders and renewals. A paid Order is not proof that value landed.





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

# 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.