Value-First Partner Client

Partner Client in HubSpot

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

HubSpot's own record of a customer account it credits us with, as the partner who sold it or manages it.

Only HubSpot Solutions Partners have it, and we use it as HubSpot ships it. HubSpot creates every record: which Account, sold or managed, its start date and, once ended, its end date.

Try it in your portal

Link a client to its Account. Open the record and add its Account in the right sidebar; HubSpot then fills in the record's name and domain from it. CRM › Partner Clients. Needs a Partner Account. Super Admin or Edit associations.

Save a view of past clients. HubSpot clears the relationship type when a relationship ends, so filter on Relationship End Date. CRM › Partner Clients › + add view, set the filter, Publish. Needs a Partner Account. Create CRM views.

Keep your facts on the Account. Every field on ours is HubSpot's, so we keep our own facts on the Account, such as a client's portal ID and hub tiers. Settings › Properties › Company properties › Create property. Any plan. Edit property settings.

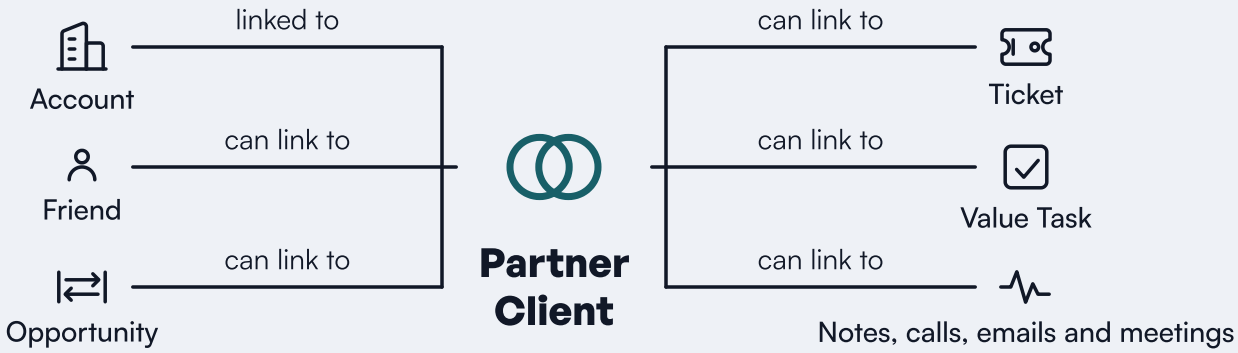
Whose value does it serve?

Value in Context

Whoever has to decide what to do next with a customer. The record can show them that customer's HubSpot setup: what they have, their limits and how much they use HubSpot.



What links to a Partner Client?



Only the link to the Account is in use in our portal.

Also connected, though not drawn: HubSpot's own partner records, partner services and activity shared with HubSpot.

How does a Partner Client change?

It has no stages. HubSpot decides when a record is active: while it lists us as the partner who sold or manages the account. When that relationship ends, HubSpot clears the relationship type and the record turns inactive. The end date stays on the record.

What is a Partner Client not?

Not the list of who we work with. It is HubSpot's statement about one HubSpot account. It does not make anyone a paying customer of ours.

Not our revenue. Any subscription amounts on it are what the customer pays HubSpot.

Not the relationship itself. That lives on the Account, and on the Friend records of the people in it. The record only points at the Account.