Value-First Price Book

Price book in HubSpot

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

A HubSpot price book is a named set of prices, so one product can carry a different price per currency or group of buyers.

We use price books as HubSpot ships them, and have set none up. Each opportunity's agreed price sits on its own line items instead.

Why is it hard?

> "... price books, CPQ, and all this stuff have been so complex for humans to manage on their own."



Chris Carolan, Another Orange Morning, 21 July 2026

Try it in your portal

Set the agreed price on the opportunity. Edit a line item for this opportunity only; the product in your library keeps its own price. Deals (our Opportunities) › the record › Line items card › Edit › hover over a line item › Actions › Edit. All products and plans.

If you use price books, let the seller choose. With no assignment rules, sellers pick one on the opportunity. HubSpot advises testing rules with auto-assignment off. Products › Manage price books › a book › Assignment rules. Revenue Hub Professional or Enterprise.

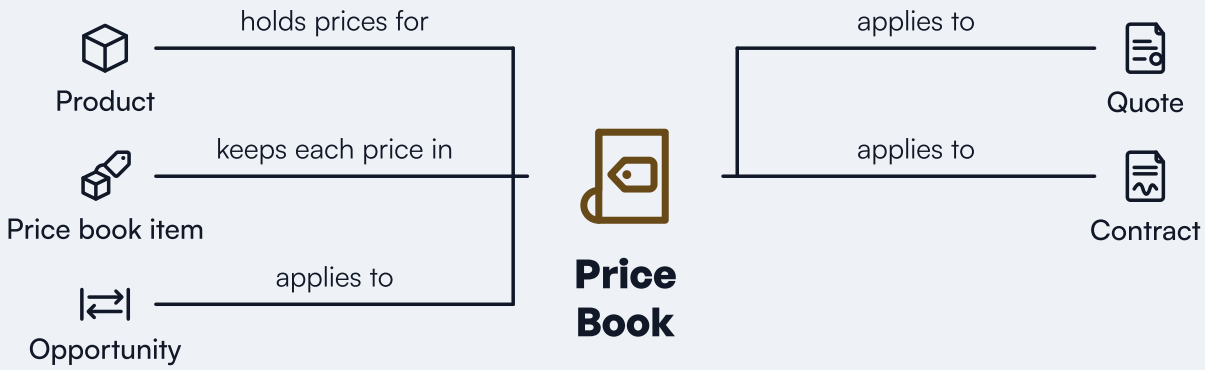
Whose value does it serve?

Value for the Company

That means our own organization. A price is part of the promise we make, so a price book would belong in our whole commercial picture. We leave it empty and set each price with the client, on the opportunity.



What links to a Price Book?



HubSpot builds in every link shown here, and none is in use in our portal.

How does a Price Book change?

A Price Book has no stages, and HubSpot allows no pipeline on this object. Its only state is a switch, active or inactive. In our portal nothing has changed on one, because none has been made.

What is a Price Book not?

Not the product. What we offer is a Product, with its own name and description. A price book only holds prices for products.

Not tied to a person. A price book never links to a person or an Account. HubSpot applies one by rules on the opportunity.

Not the agreed price. The price a client agreed to sits on the opportunity's line items, never in a price book.