Value-First User

User in HubSpot

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

Each User record is one seat in the portal, with the access that comes with it.

We use User as HubSpot ships it, adding nothing of our own. A person's Friend record stays separate.

What does it tell you?

> "This view starts to get very, very close to a job description."
>
> Chris Carolan, Another Orange Morning, 3 November 2026

Try it in your portal

Read someone's access. See a user's seat and permissions without opening the editor, to check what each person can do. Settings › Users & Teams › the user › Access tab. All plans.

Name a countersigner. Have one named person on your team countersign quotes alongside the buyer. Quote editor › acceptance module › Countersigners. Revenue Hub Professional or Enterprise. Needs a Revenue Hub seat to make the quote.

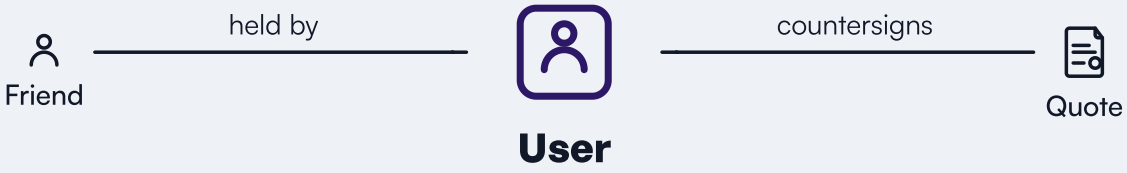
Whose value does it serve?

Value for the Community

That means everyone outside the transaction. Here, the record holds the access that lets each person do their part of the work in the shared system.



What links to a User?



A seat can be taken back without ending a relationship, so we keep a person's user record and Friend record separate and link them.

HubSpot can also link a user to opportunities, accounts, tickets, projects and more; we use none of those links.

How does a User change?

A user record does not move through stages. Deactivating it switches the seat off but keeps the record, and HubSpot works out an invite status for it. A person's place on the Value Path is on their Friend record, not here.

What is a User not?

Not only people. Many user records are connected apps or HubSpot's own AI agents, with nobody signing in.

Not where our AI team members live. They have Friend records and, today, no user records.

Not a record of someone we serve. It holds who can work in the portal, never our relationship with a person we help.