

Which record holds what?

Completed reference map / HubSpot Contracts explainer / 19 October 2026

One customer can have several independently managed agreements.

Record responsibilities

Company: identifies the customer and shared relationship context.

Legal document set: supplies the agreed terms, service schedules and accepted amendments. The commercial CRM record does not replace it.

Deal: tracks the original sale, expansion or renewal opportunity. Quote: presents a proposal for buyer acceptance when that route is used.

Contract: manages the commercial commitment, services and lifecycle. A Draft is proposed data, not proof of acceptance.

Invoice: records what was billed and when it is due. Payment: records payment activity and status; check the origin and status.

Subscription: verify the setup. Standard subscriptions can control recurring billing. In the connected billing beta, the Contract controls billing and the Subscription supports reporting. External billing has its own controller.

Fictional Cedar Vale comparison

Solar: USD 1,000 monthly x 12 payments = USD 12,000; 1 Nov 2026 to 31 Oct 2027. Battery: USD 250 monthly x 12 = USD 3,000; 1 Dec 2026 to 30 Nov 2027.

The demonstrated records are drafts with HubSpot billing off. Documents are illustrations. Commissioning is excluded from those recurring totals.

Architecture guide

<https://swotbee.com/posts/hubspot-contract-management/>

Map one real agreement

Field-source worksheet / duplicate this page for each agreement

Customer: _____ Agreement ID: _____

Operational owner: _____ Checked on: _____

Billing controller and record ID: _____

For every field, record the source document and clause/page, owning operational record, copied locations, responsible person and verification date. Do not resolve conflicting evidence by guessing.

1. Customer and agreement identity

Value / source / owning record: _____

2. Service scope, price, currency and recurrence

Value / source / owning record: _____

3. Term dates, payment count and total commitment

Value / source / owning record: _____

4. Renewal rule and notice deadline

Value / source clause / reviewer: _____

Keep contract end, invoice due date, Deal close date and legal notice deadline separate. Record N/A when a rule does not apply; leave unknowns unresolved and assigned.

Check the links and handoff

Association checks / expected versus observed / no automatic pass implied

Agreement ID: _____ Reviewer: _____

Three checks before automation

- [] Evidence: retrieve the correct source set, including accepted amendments.
- [] Values: compare price, term dates, currency, quantity and total basis.
- [] Associations: confirm linked Deal and billing records belong to this agreement.

Association detail

- [] Correct buyer Company and billing party.
- [] Relevant Deal and accepted Quote version, if used.
- [] Line items belong to the intended parent records. Separate IDs can be normal.
- [] Invoices match this agreement and billing period; payment status is checked.
- [] Billing controller is identified; billing-off records may have no native invoices.
- [] Renewal links to its predecessor when applicable.

An association is not a synchronization rule. A manually linked Invoice can change a Contract billed total without changing its commitment. Verify relationships before relying on the numbers.

Record one discrepancy and next action

Expected: _____

Observed: _____

Source / affected record: _____

Owner / due date / next action: _____

Retest result / checked date: _____

Use a shared spreadsheet, controlled document links and assigned tasks for a maintained manual process. Beta access, plan requirements and actual account configuration must be checked separately.