

Phased-pricing worksheet

One three-year commitment / two billing patterns / fictional example

Separate commitment term, price schedule and invoice frequency.

Agreement CV-3Y-001: 1 Jan 2027 to 31 Dec 2029. One service, quantity 1. Fixed prices agreed at the start. No usage, tax or one-time fee in these example totals.

The agreed annual price schedule

Year 1 / 1 Jan - 31 Dec 2027 / USD 12,000

Year 2 / 1 Jan - 31 Dec 2028 / USD 13,200

Year 3 / 1 Jan - 31 Dec 2029 / USD 14,520

Total commitment: USD 39,720. The agreed increase is 10% on the previous yearly price. An anniversary price change is not automatically a new sale or renewal negotiation.

Choose the billing pattern separately

Annual example: 3 charges, one for each yearly amount.

Monthly example: 12 x USD 1,000; 12 x USD 1,100; 12 x USD 1,210.

Both total USD 39,720. Invoice issue and due dates follow the agreed terms.

Apply it to your agreement

Agreement ID / source version: _____

Term start / end: _____

Phase 1 dates / price / quantity: _____

Phase 2 dates / price / quantity: _____

Phase 3 dates / price / quantity: _____

Billing frequency / owner: _____

Record each phase price in its intended currency and unit. Future phase prices are not all active at once. Keep total commitment, current rate, invoice amount and cash received separate.

Configuration decision checklist

Documented options / verify the actual account before implementation

1. Establish the commercial source

- ☐ Current agreed schedule and amendments are retrievable.
- ☐ Phase dates, prices, quantity and full term reconcile.
- ☐ Annual price changes are separate from invoice frequency.

2. Choose and verify the HubSpot route

- ☐ Identify the exact quote or Contract experience and account permissions.
- ☐ Quote ramp pricing: check Revenue Hub Professional/Enterprise and seat.
- ☐ Verify payment processing; current docs restrict ramps with HubSpot payments.
- ☐ Direct Contracts: dated items are documented; verify the exact beta route.
- ☐ Migration: a separate billing process; ramp keys are not universal quote fields.

The video explains documented choices. It does not demonstrate a working three-year quote, billing setup or migration. Documentation and sample arithmetic do not prove an automatic transition works in your portal.

3. Name the billing controller and handoff

- ☐ One intended system controls invoices and changes.
- ☐ Finance confirms external billing setup where applicable.
- ☐ Other invoice jobs will not duplicate charges.
- ☐ Reporting definitions and revenue recognition are checked separately.

Chosen route / account version: _____

Controller / reviewer / next check: _____

Official quote guide

<https://knowledge.hubspot.com/quotes/create-and-send-quotes>

Direct Contract guide

<https://knowledge.hubspot.com/contracts/directly-create-contracts-in-hubspot>

Documentation checked 19 Oct 2026. Source and billing restrictions may change; recheck before configuring.

Transition tests

Expected states first / record observed results separately

Agreement ID: _____ Environment: _____

Reviewer / date: _____

Expected phase and price checks

- ☐ Before 1 Jan 2027: no example service phase is active.
- ☐ 31 Dec 2027: Year 1 price still applies.
- ☐ 1 Jan 2028: Year 2 price applies; Year 1 stops.
- ☐ 1 Jan 2029: Year 3 price applies; Year 2 stops.
- ☐ After 31 Dec 2029: continuation follows source terms; no invented year-four price.

Expected charge and reconciliation checks

- ☐ Annual example amounts: USD 12,000 / 13,200 / 14,520.
- ☐ Monthly example rates: USD 1,000 / 1,100 / 1,210, each for 12 months.
- ☐ At Year 2, do not charge both USD 1,000 and USD 1,100 for one month.
- ☐ No service-period gap, overlapping phases or duplicate billing job.
- ☐ Three annual charges or 36 monthly charges total USD 39,720.

All results above are expected for this example. Invoice issue/due dates and advance billing depend on the actual terms. The supplied arithmetic/boundary model is a simulation, not a HubSpot billing test.

Capture one actual result or exception

Test ID / expected: _____

Observed / evidence record: _____

Status / discrepancy: _____

Owner / next action / due date: _____

Retest / checked date: _____

Keep source, commercial phase, billing record and actual observed result traceable. Test safely before any live billing changes; this pack does not authorize sending invoices or charging buyers.