

Classification dictionary

One purchase / distinct recurring and one-time measures

Define the dollars before you design the report.

Fictional purchase CV-RE-001. One full year: 1 Jan to 31 Dec 2027. USD, before tax. No discounts, credits, usage or proration. Assume the renewal and expansion are won and effective at the reporting date.

Retained renewal / USD 12,000

The existing annual service continues. Included in closing ARR; contributes zero incremental recurring growth. Compare to the prior active agreement and product entitlements.

Recurring expansion / USD 3,000

An additional annual service increases recurring value. Included in closing ARR and recurring growth once effective. Keep proposed/lost amounts separate from active recurring value.

One-time commissioning / USD 1,500

Included in the current purchase, excluded from ARR. Invoice timing, recognized revenue and commission eligibility are separate questions.

Closing ARR is USD 15,000. Current one-year consideration is USD 16,500. Recurring growth is USD 3,000. The retained USD 12,000 is already in the opening baseline; never add it twice.

Agree and record your own definitions

Metric owner: _____ Currency / reporting date: _____

Source agreement / quote version: _____

Discount / uplift policy: _____

Commission policy / version / owner: _____

ARR is an operational recurring-value measure here. The example does not establish an accounting recognition policy or a universal commission payout rule.

Reconciliation sheet

Trace each component once, then reconcile two different questions

A. Current-term purchase consideration

CV-RE-001-R / Retained renewal: USD 12,000

CV-RE-001-E / Recurring expansion: USD 3,000

CV-RE-001-O / One-time commissioning: USD 1,500

CURRENT-TERM TOTAL: USD 16,500

B. Recurring-value bridge

Opening ARR: USD 12,000

Less contraction: USD 0

Less churn: USD 0

Plus effective recurring expansion: USD 3,000

Closing ARR: USD 15,000 / recurring growth: USD 3,000

Do not add opening ARR (12,000) to the entire new recurring amount (15,000). That produces the incorrect 27,000. Likewise, do not add a combined parent amount to the same child/component amounts.

Source and row-grain checks

- ☐ Every reporting contribution has one authoritative component identity.
- ☐ Quote, deal and billing copies are traceable, not added as independent facts.
- ☐ Currency, term, effective date and reporting status use the same definitions.
- ☐ Extra contact/activity associations do not multiply money.
- ☐ Open and lost expansion stay visible in history, outside active ARR.

Apply to your purchase

Purchase / source IDs: _____

Retained / expansion / one-time: _____

Consideration total / closing ARR / growth: _____

Actual report result / difference / owner: _____

Suggested reporting categories are design choices, not guaranteed native HubSpot fields. Deal ARR, Enterprise Revenue Analytics and custom reports have different inputs and access requirements.

Reporting test cases

Expected arithmetic first / record observed account results separately

Environment / report / version: _____

Reviewer / reporting date: _____

Expected results for the controlled example

T01 Renewal only: closing ARR 12,000; growth 0.

T02 Renewal + expansion: closing ARR 15,000; growth 3,000.

T03 Add 1,500 one-time: consideration 16,500; ARR still 15,000.

T04 Expansion lost: closing ARR 12,000; preserve proposed expansion history.

T05 Retain 10,000 + expand 3,000: closing ARR 13,000; net growth 1,000.

T06 Expansion starts later: exclude it from active ARR before its effective date.

T07 Duplicate an associated row: authoritative component totals stay unchanged.

T08 Combined parent + children: include contributions at only one agreed grain.

These are expected results and local model tests. No HubSpot report, consolidated quote, invoice or commission workflow was executed. Native report behavior needs observation in the actual account.

Capture one observation or discrepancy

Test ID / expected: _____

Observed value / source evidence: _____

Pass / fail / not run: _____

Discrepancy / owner / retest: _____

HubSpot source checks before configuration

[] Check line-item terms and native ARR/MRR access.

[] Enterprise Revenue Analytics: check monthly inputs and event lifecycle.

[] Custom reports: check subscription, permissions, joins and filters.

[] Commission inputs and payouts follow an approved compensation policy.

Official sources checked 19 Oct 2026: knowledge.hubspot.com/properties/hubspots-default-deal-properties and [/reports/track-recurring-revenue-with-revenue-analytics](https://knowledge.hubspot.com/reports/track-recurring-revenue-with-revenue-analytics). Full source manifest is in the editable video project.