Technical Specification Summary: Product Taxonomy & Line Item Extension in HubSpot

Overview:

This specification outlines enhancements built on HubSpot by New Breed to support structured product taxonomy and advanced deal calculations using a Product Taxonomy Card and Product Line Item Extension.

Key Features:

- Product Taxonomy Card:

- Displays category, subtype, timestamps, and links in HubSpot records.

- Uses custom objects or properties for taxonomy data.

- Product Line Item Extension:

- Allows entry of products tied to deals.

- Includes custom inputs: revenue, GP %, markup.

- Auto-calculates GP Fee, Initial Year GP, and more.

- Financial roll-up logic displayed on the Deal Financials card.

Financial Logic:

- GP Fee = Revenue × GP Fee %

- Initial Year Amount = Revenue × (Days left / 365)

- Initial GP Fee = GP Fee × (Days left / 365)

- Summarized totals calculated per deal

Deployment & Permissions:

- Git-controlled deployment via HubSpot CLI

- Card visibility and edit rights role-based

- Deal validations prevent incomplete submissions

Future Ready:

- Expandable to support localization, nested taxonomy trees, ERP sync

Prepared by: Engineering Review Team | Version: 1.1