

# Interact with Specialized HubSpot Assistants

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Created by

Creation Date

Last Updated

Logical Position

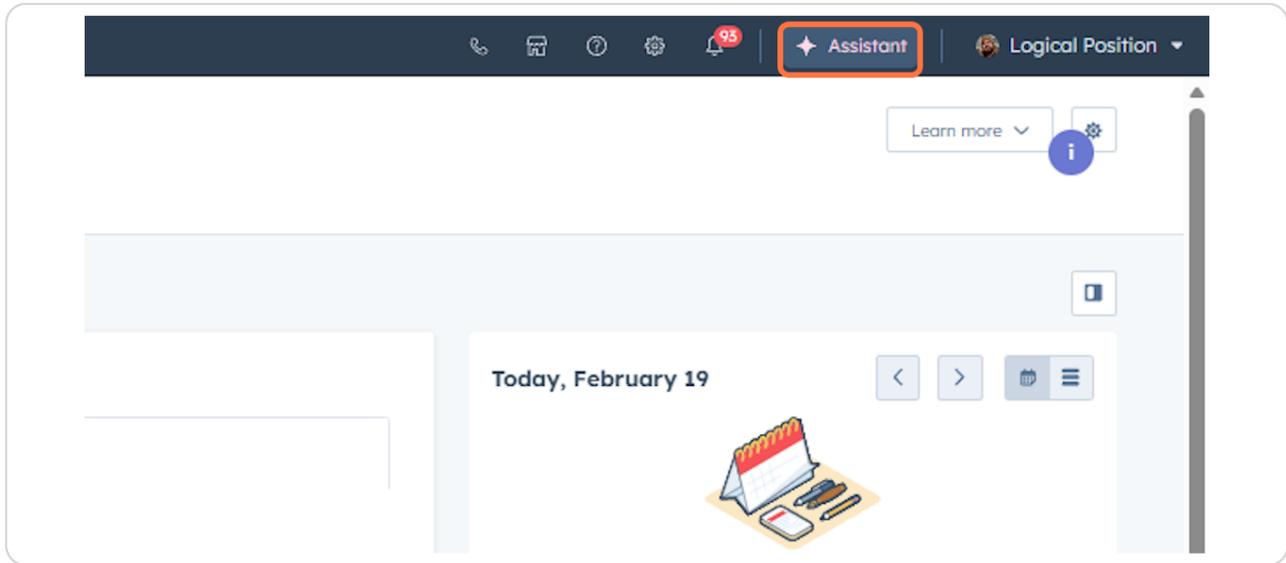
Feb 19, 2026

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## STEP 1

### Click on Assistant In Top Navigation Bar

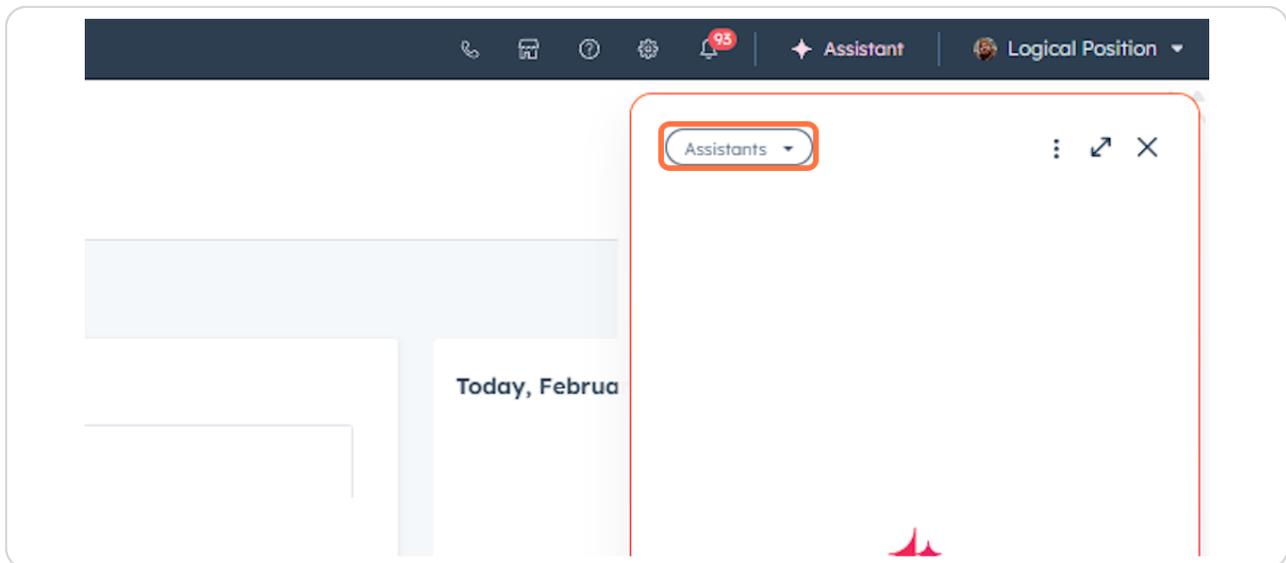
To easily access the Assistant from anywhere in HubSpot, select Assistant in the top right corner of the HubSpot interface. This will open Breeze Assistant on the right-hand side of the screen.



## STEP 2

### Toggle To Specialized Assistants

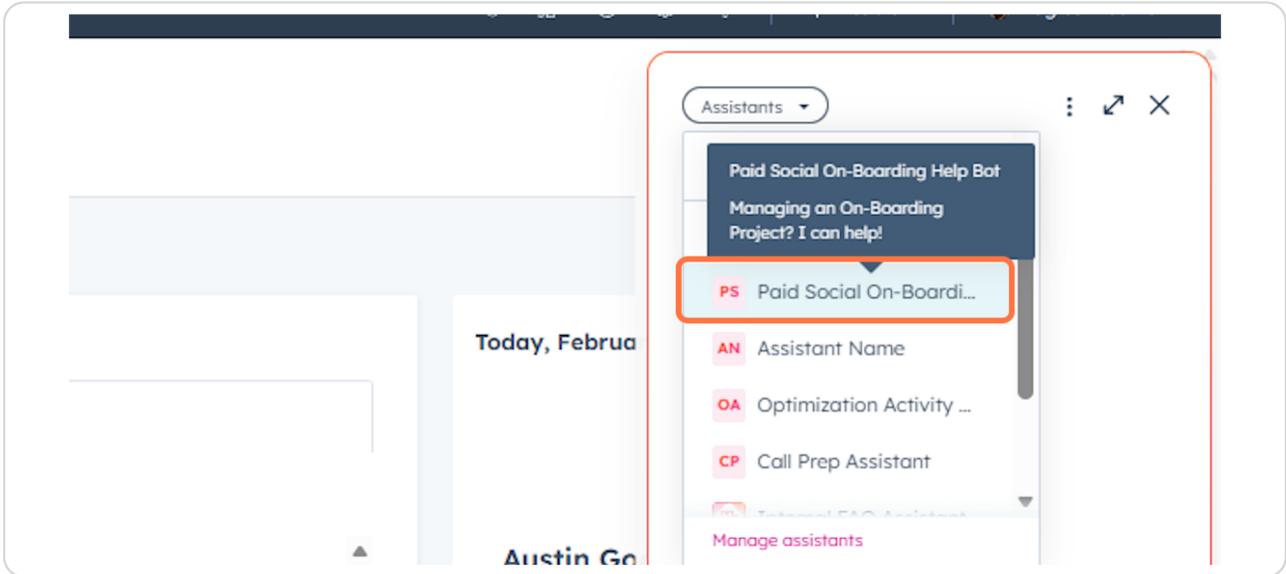
To find the Specialized, LP assistants, select the "Assistants" dropdown in the top left corner of the Breeze Chat interface.



### STEP 3

#### Select a Bot From The List

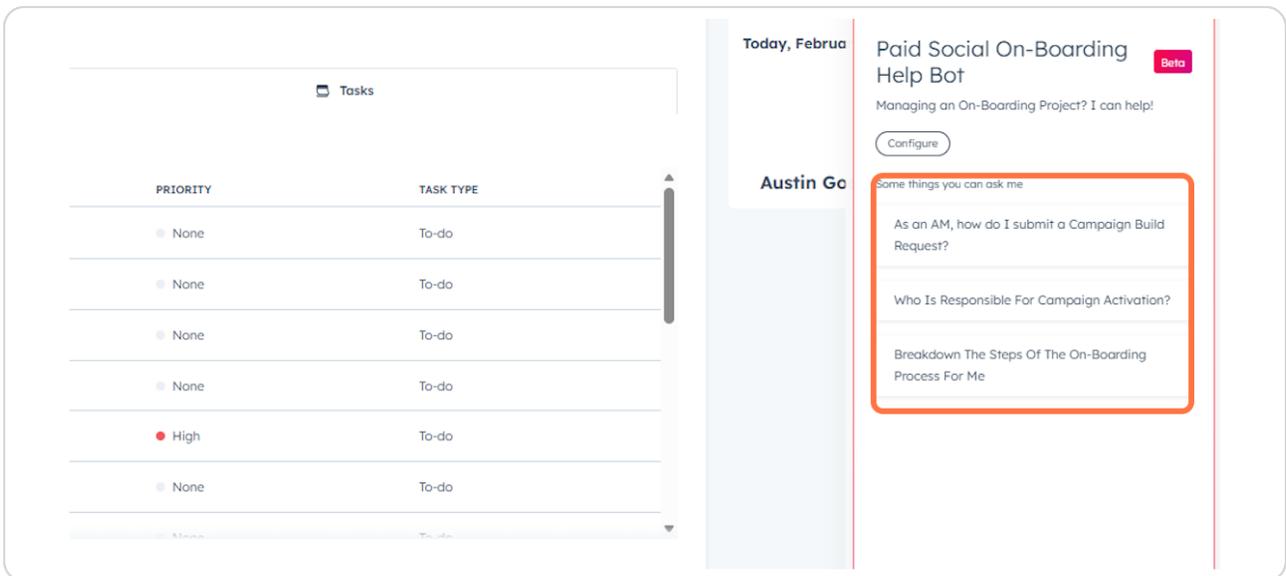
Select a bot from the list. These will be named appropriately based on the topics they cover. We have these split out so that the AI can provide better answers only having to parse focused information.



### STEP 4

#### Each Bot Has Standard Prompts You Can Use

You can select one of the standard prompts in the bot to quickly dive into a chat.



## STEP 5

### If Using Custom Prompt, Type Query In Text Box

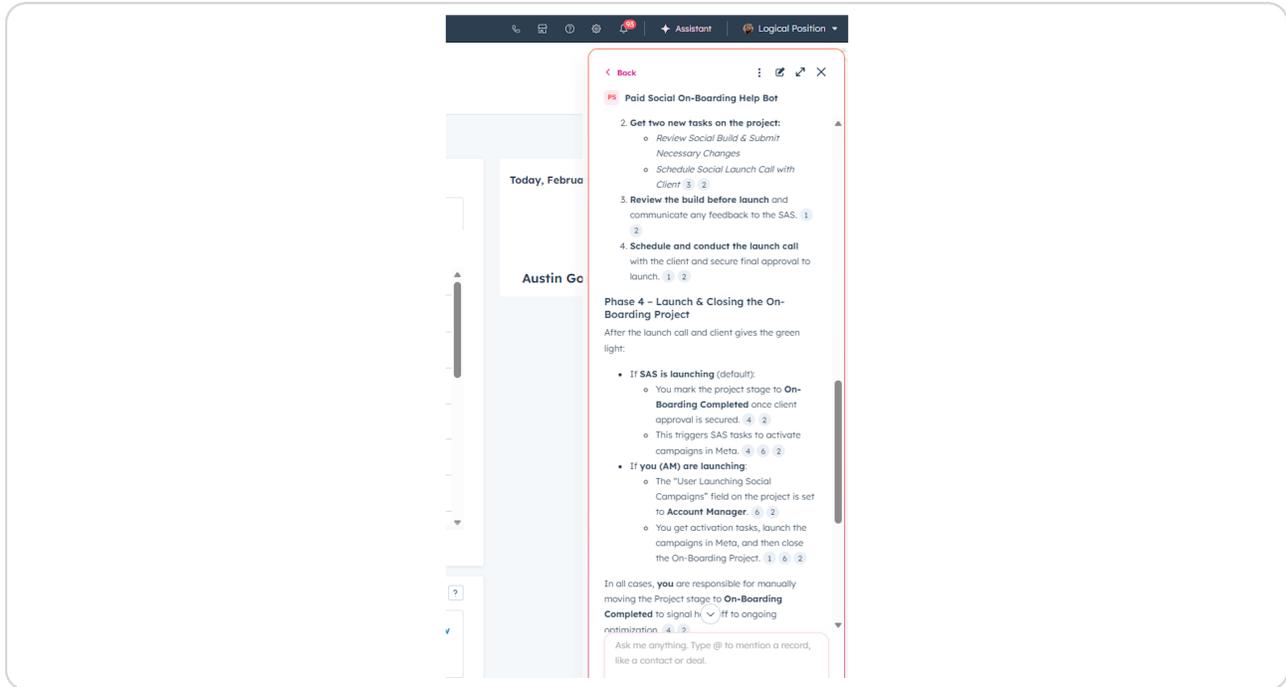
Type your query about the topic into the text box and hit send (paper airplane icon)



## STEP 6

### Review The Bot's Response

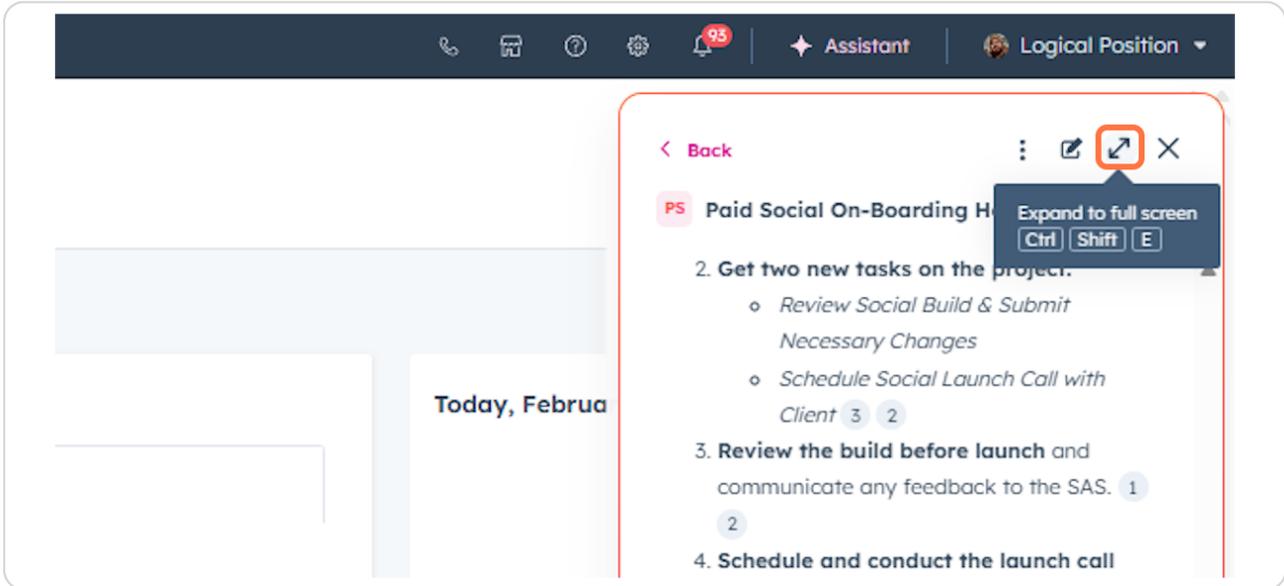
The Bot will formulate a response to your query using the knowledge we have provided it. The sources that these bots pull from are Knowledge Base articles, User Guides, Screenshot Walkthroughs, and Video Transcripts that you also have access to.



## STEP 7

### Expand The Window, If Needed

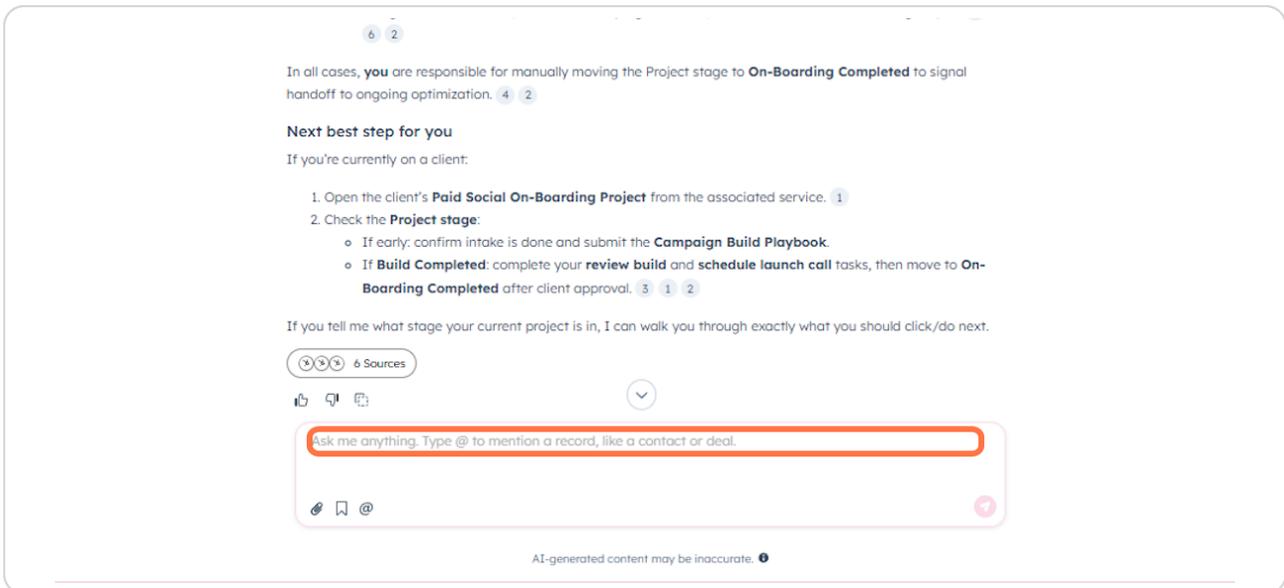
Click the expand icon in the top right to make the window bigger.



## STEP 8

### Query The Response Further

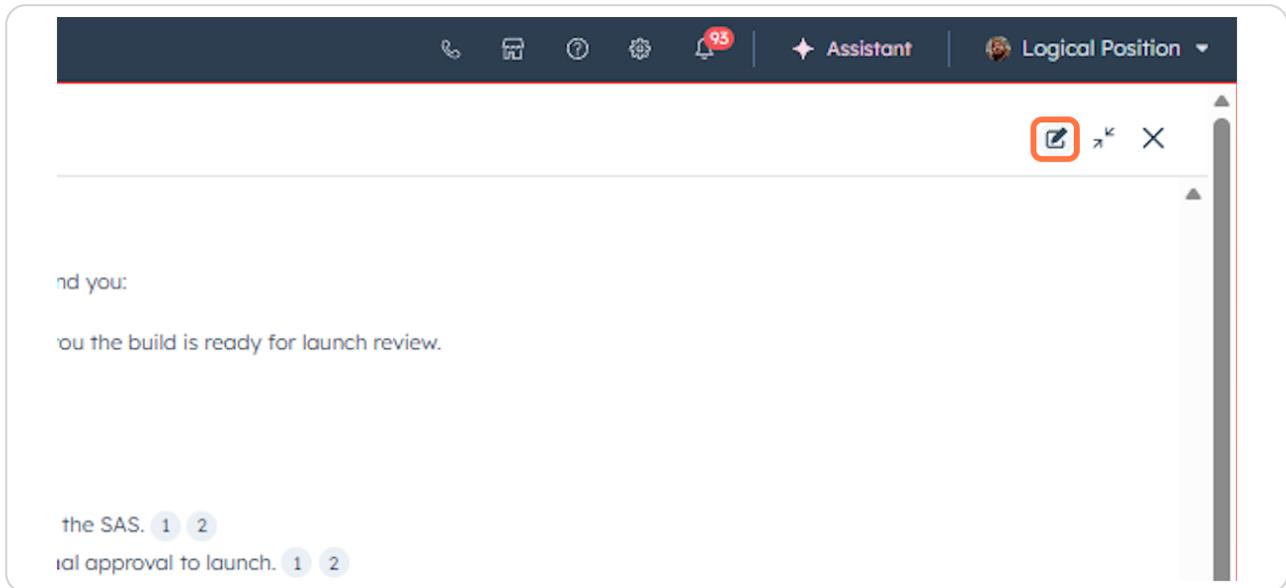
The nicest part of a bot is that it will allow you to query further into a topic. Ask it to clarify something, dive into more detail, or simplify an explanation!



## STEP 9

### Start A New Chat

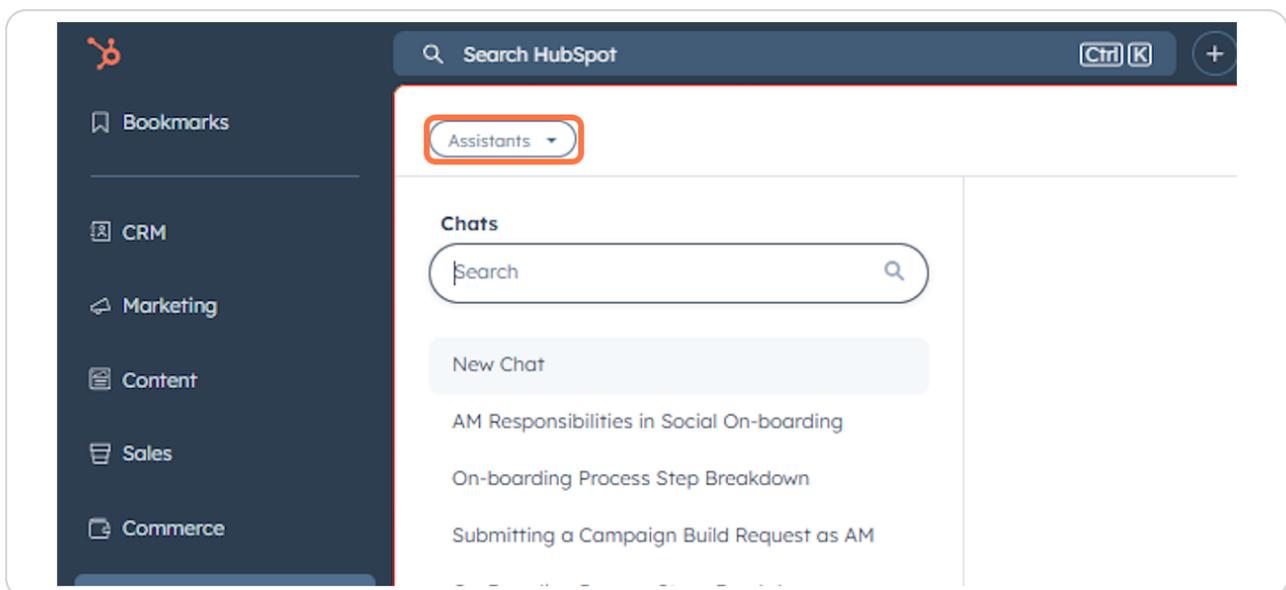
If you want to start an entirely new query, or access a different bot, click the pencil icon in the top right.



## STEP 10

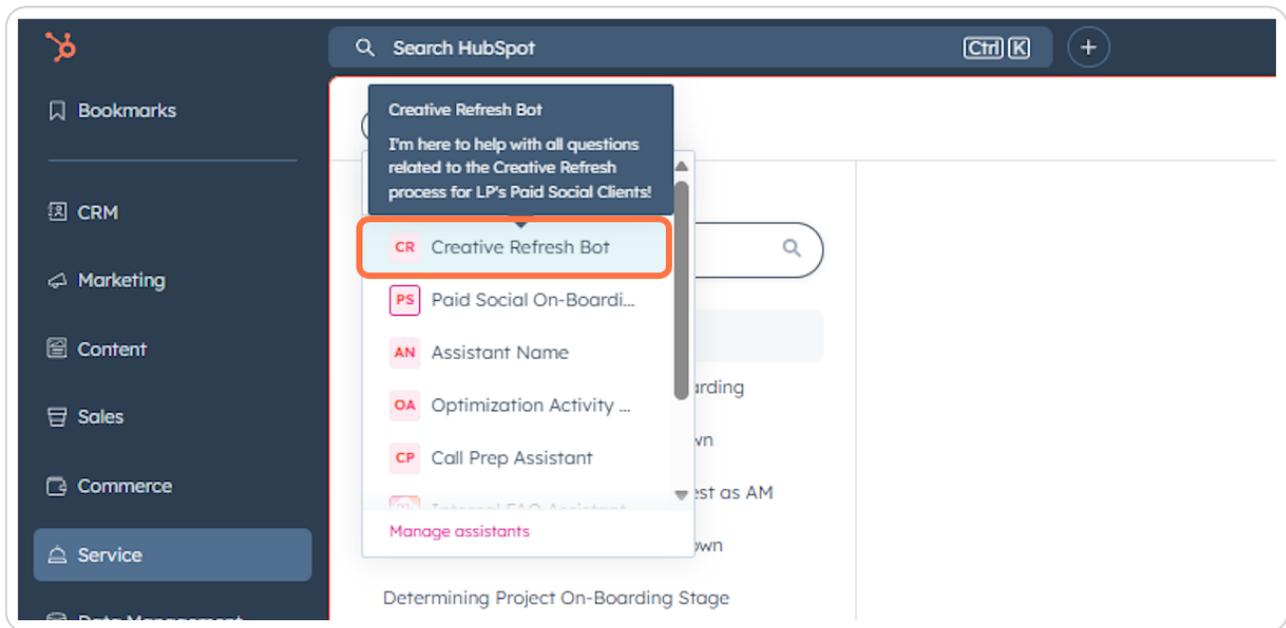
### Click on Assistants

Select Assistants and find the new bot you want to query from the dropdown



## STEP 11

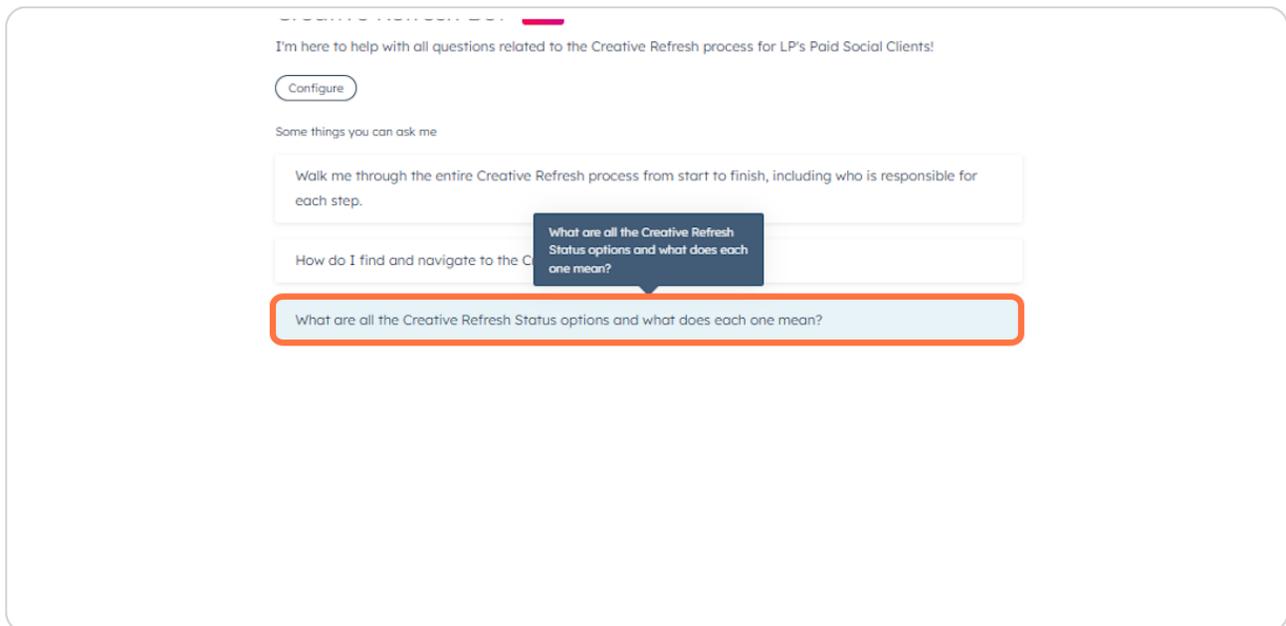
### Select New Bot



## STEP 12

### Select New Standard Prompt

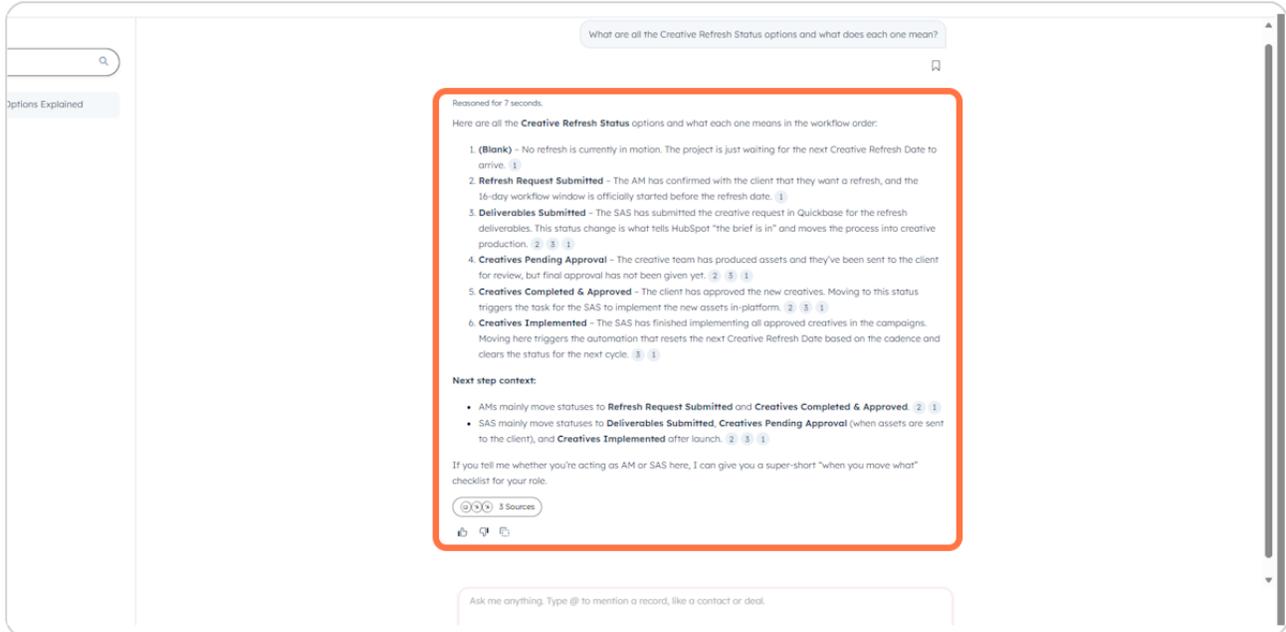
To use the standard prompt, just select it from the interface



## STEP 13

### Review Bot Response

This will automatically send the bot out to answer your standardized query.



The screenshot shows a chatbot interface with a search bar on the left and a main chat area. The chat area contains a query: "What are all the Creative Refresh Status options and what does each one mean?". The bot's response is displayed in a white box with a red border. The response includes a reasoning time of 7 seconds and a list of six Creative Refresh Status options with their meanings and workflow order. It also includes a "Next step context" section with two bullet points and a note about providing role information for a super-short checklist.

Reasoned for 7 seconds.

Here are all the **Creative Refresh Status** options and what each one means in the workflow order:

1. **(Blank)** - No refresh is currently in motion. The project is just waiting for the next Creative Refresh Date to arrive. [1](#)
2. **Refresh Request Submitted** - The AM has confirmed with the client that they want a refresh, and the 16-day workflow window is officially started before the refresh date. [1](#)
3. **Deliverables Submitted** - The SAS has submitted the creative request in Quickbase for the refresh deliverables. This status change is what tells HubSpot "the brief is in" and moves the process into creative production. [2](#) [3](#) [1](#)
4. **Creatives Pending Approval** - The creative team has produced assets and they've been sent to the client for review, but final approval has not been given yet. [2](#) [3](#) [1](#)
5. **Creatives Completed & Approved** - The client has approved the new creatives. Moving to this status triggers the task for the SAS to implement the new assets in-platform. [2](#) [3](#) [1](#)
6. **Creatives Implemented** - The SAS has finished implementing all approved creatives in the campaigns. Moving here triggers the automation that resets the next Creative Refresh Date based on the cadence and clears the status for the next cycle. [3](#) [1](#)

**Next step context:**

- AMs mainly move statuses to **Refresh Request Submitted** and **Creatives Completed & Approved**. [2](#) [1](#)
- SAS mainly move statuses to **Deliverables Submitted**, **Creatives Pending Approval** (when assets are sent to the client), and **Creatives Implemented** after launch. [2](#) [3](#) [1](#)

If you tell me whether you're acting as AM or SAS here, I can give you a super-short "when you move what" checklist for your role.

[Sources](#)

Ask me anything. Type @ to mention a record, like a contact or deal.

*Tango*

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