

Manage Builds Reviews in HubSpot

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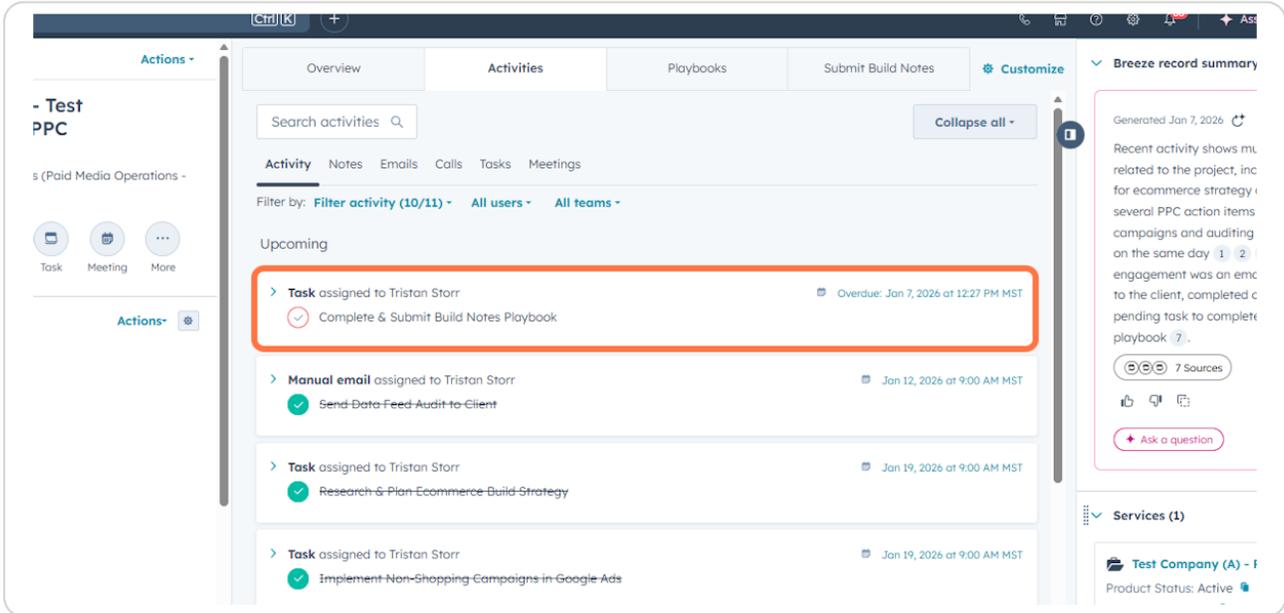
LP Team

Jan 13, 2026

Jan 13, 2026

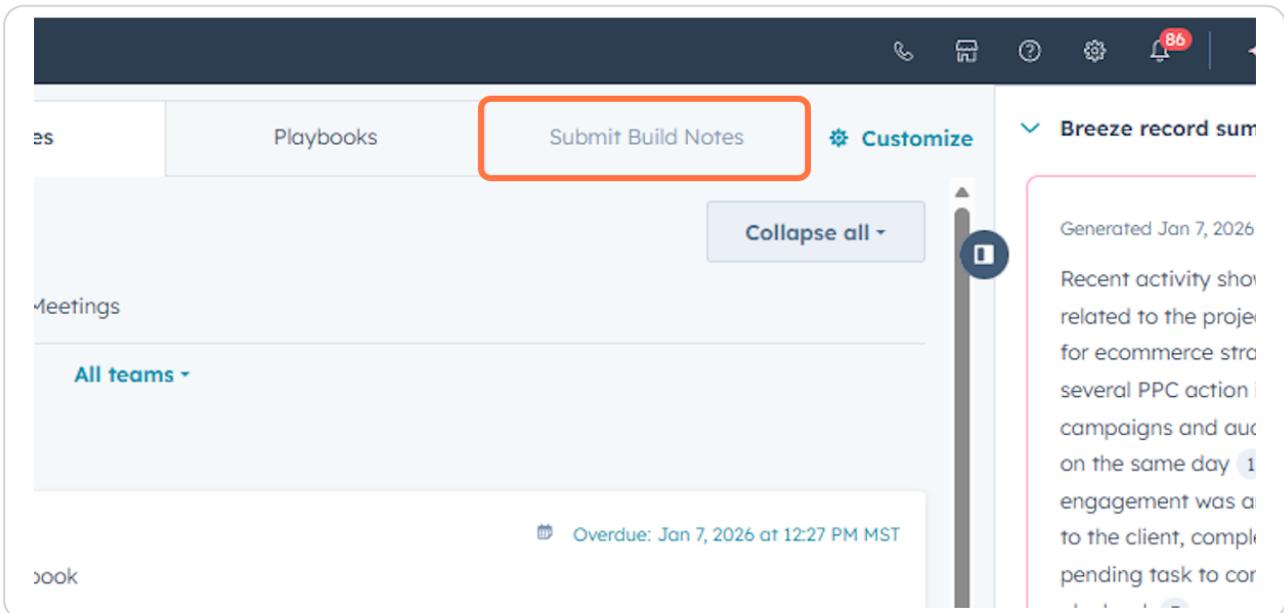
STEP 1

Once Build Tasks are completed, a new one will be generated for Completing & Submitting Build Notes Playbook.



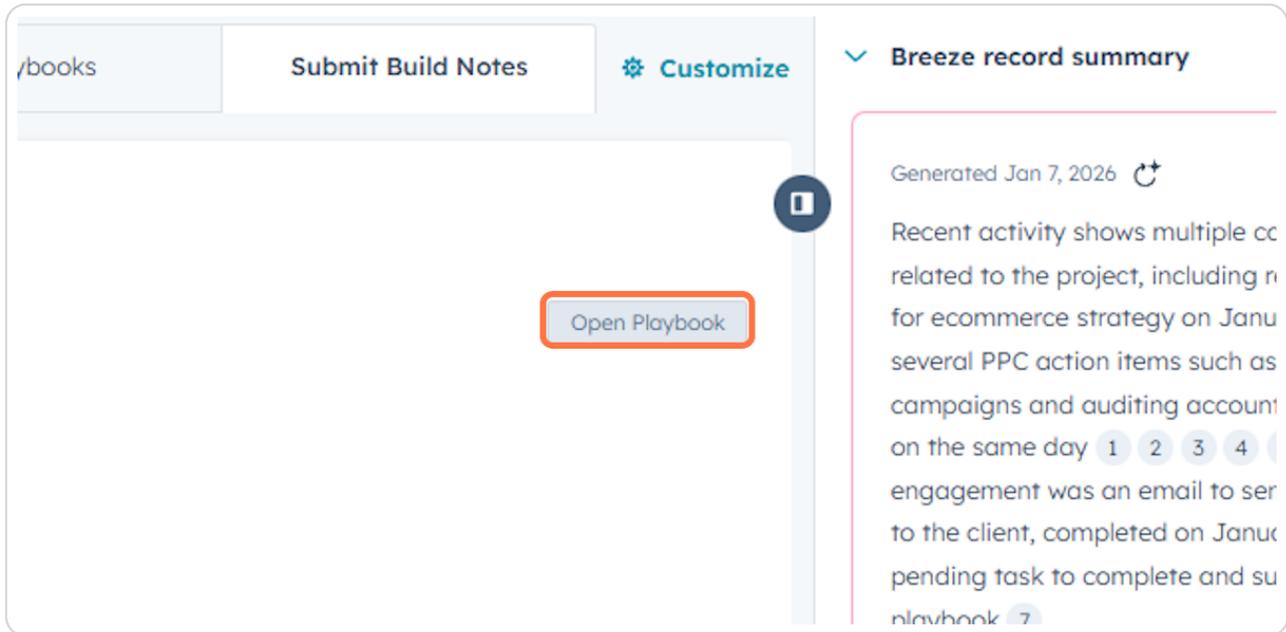
STEP 2

To log Build Notes, the Product Specialist should click over to the Submit Build Notes tab.



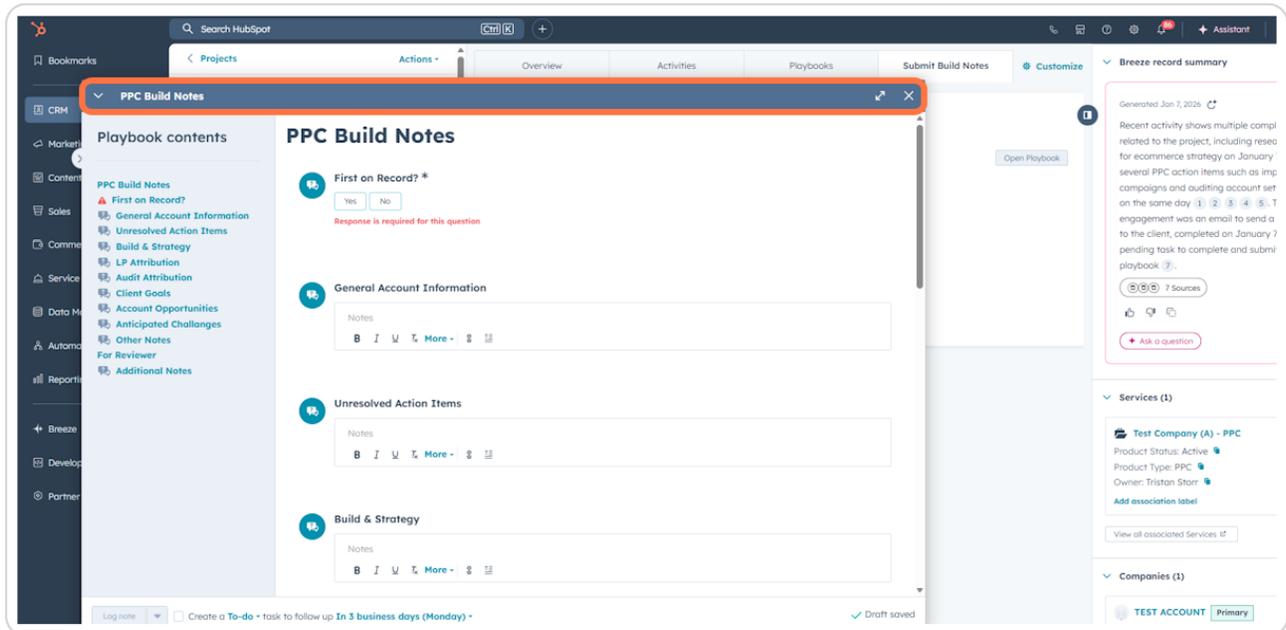
STEP 3

Click on Open Playbook



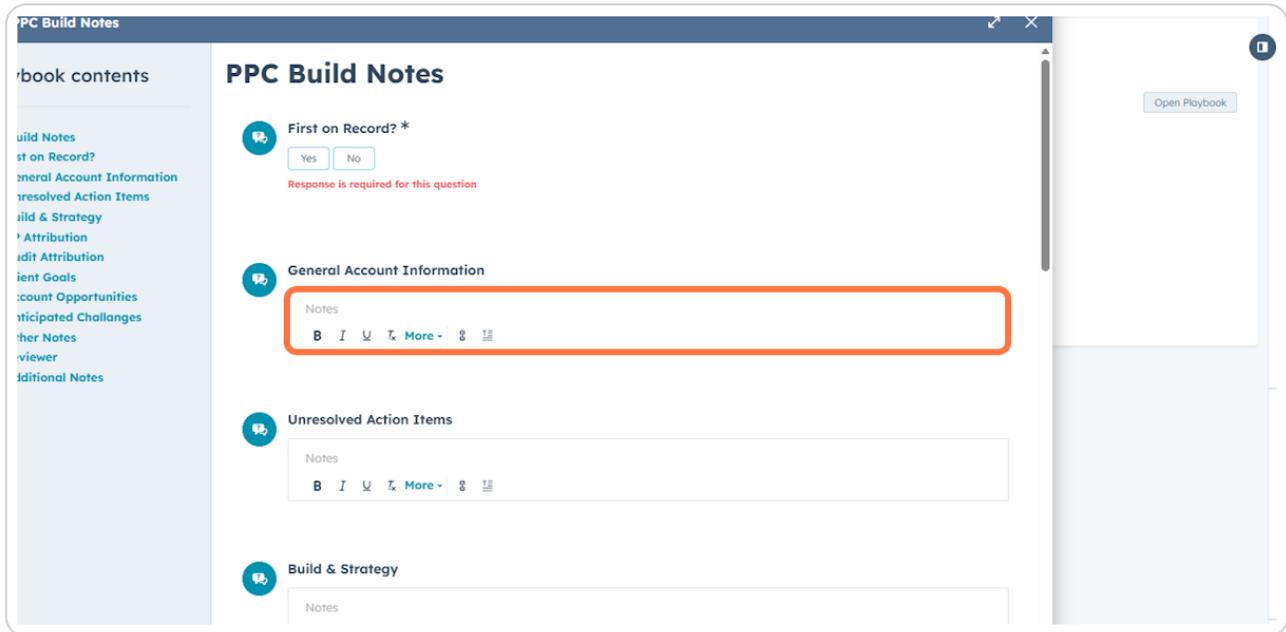
STEP 4

A new Playbook window will open with the page. This window can be resized by dragging the bottom right corner.



STEP 5

The Product Specialist will fill out the form, using each text field to describe the topic relevant to Build Strategy & the account as a whole.



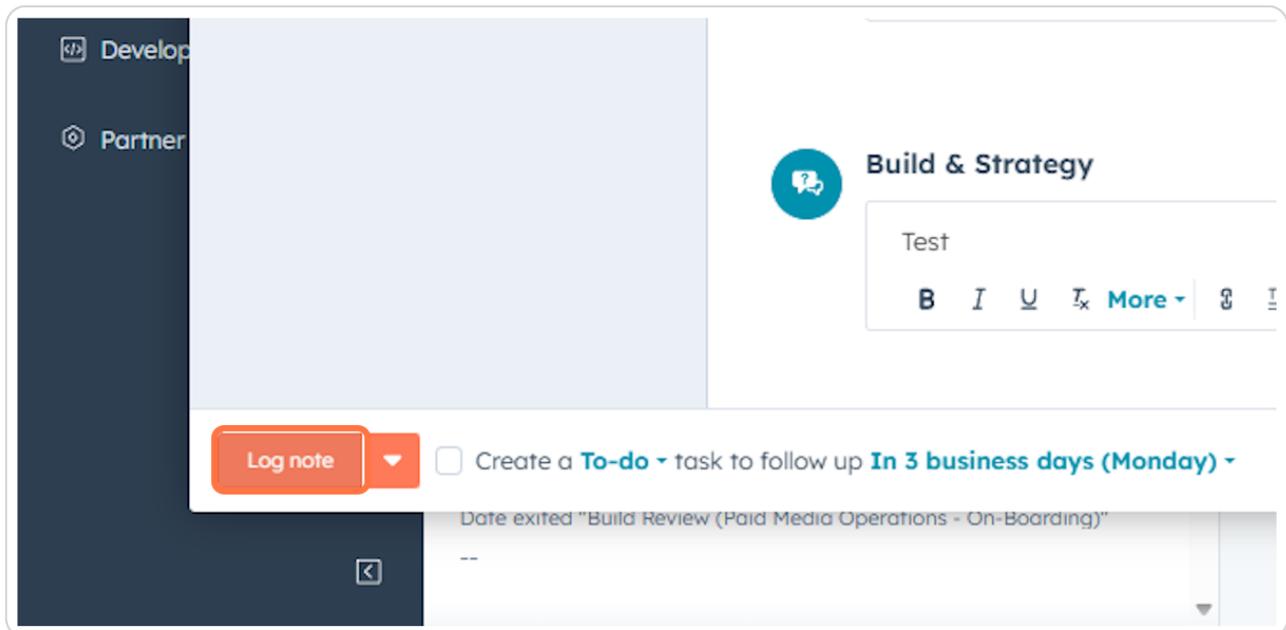
The screenshot shows a browser window titled "PPC Build Notes". On the left is a sidebar menu with items like "Book contents", "Build Notes", "First on Record?", "General Account Information", "Unresolved Action Items", "Build & Strategy", "Attribution", "Edit Attribution", "Ident Goals", "Account Opportunities", "Anticipated Challenges", "Other Notes", "Viewer", and "Additional Notes". The main content area is titled "PPC Build Notes" and contains three sections, each with a "Notes" text field and a rich text editor toolbar (B, I, U, T, More, G, L):

- First on Record? ***: Includes "Yes" and "No" buttons. A red message below reads "Response is required for this question".
- General Account Information**: The "Notes" field is highlighted with a red rectangular border.
- Unresolved Action Items**: A "Notes" field.
- Build & Strategy**: A "Notes" field.

An "Open Playbook" button is visible in the top right corner of the main content area.

STEP 6

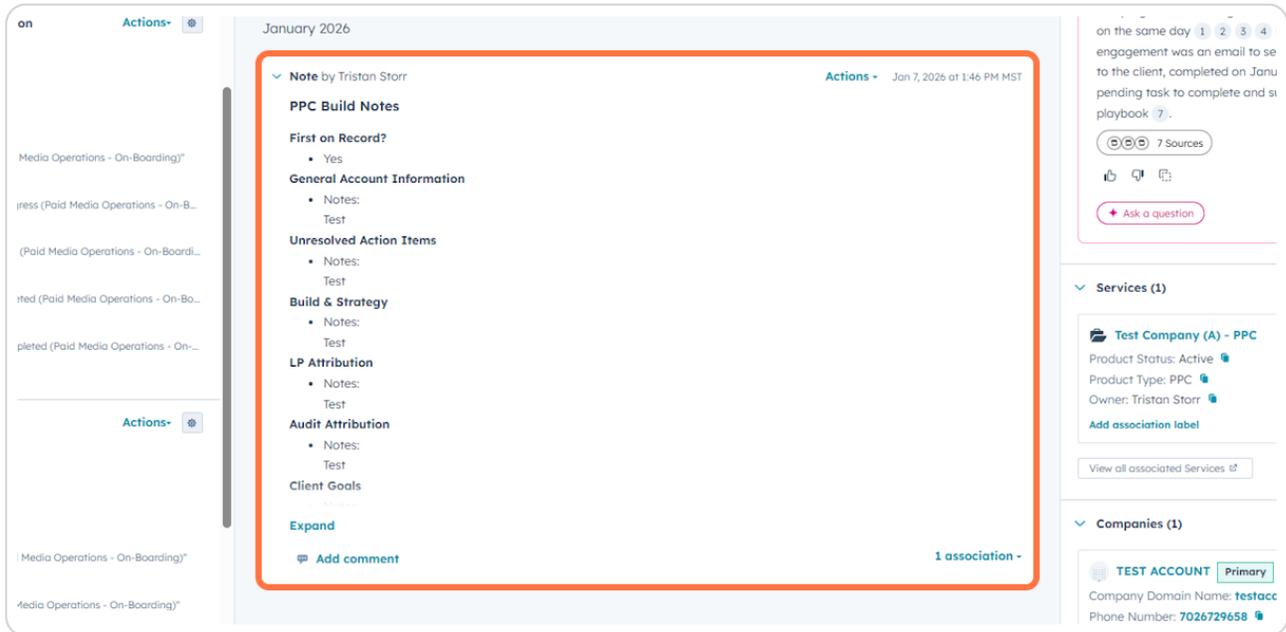
When complete, select Log Note to complete the Playbook.



The screenshot shows a "Build & Strategy" section within a Playbook. It features a "Test" text field with a rich text editor toolbar (B, I, U, T, More, G, L). Below the text field is a "Log note" button with a dropdown arrow. To the right of the button is a checkbox and the text "Create a To-do task to follow up In 3 business days (Monday)". Below this is a scrollable list of items, with the first item being "Date exited 'Build Review (Paid Media Operations - On-Boarding)'" and a "--" below it.

STEP 7

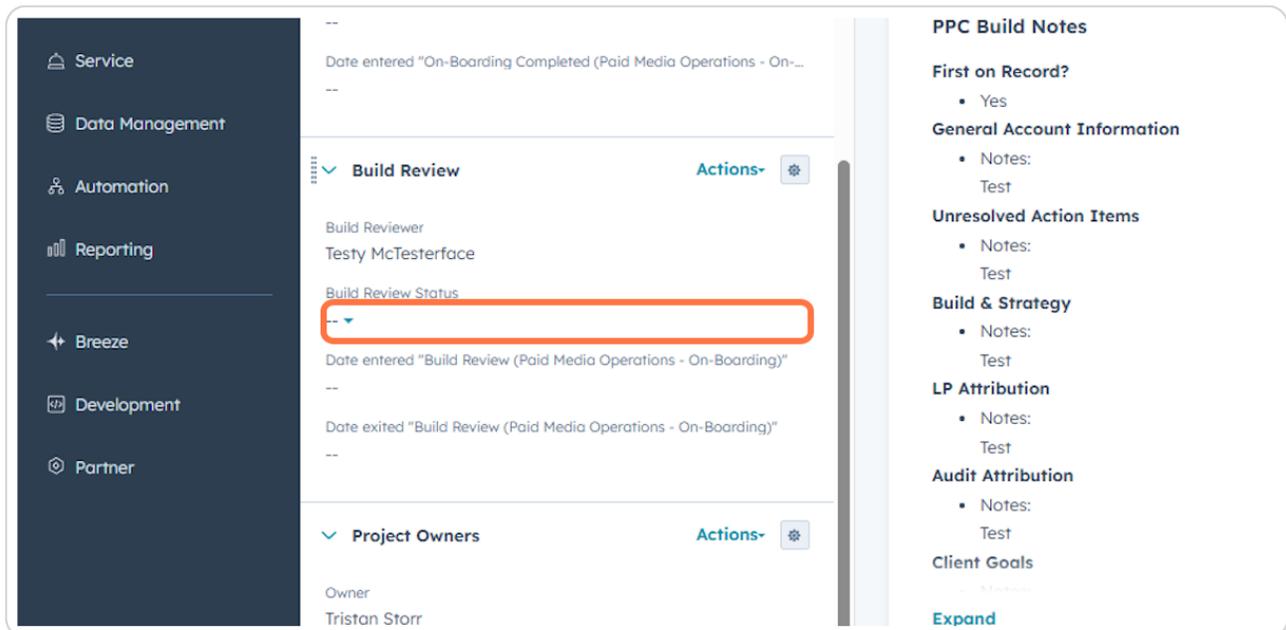
The Note will be recorded in the Activity feed of the Project record



The screenshot shows a project record interface. On the left is a sidebar with a list of items, each labeled "Media Operations - On-Boarding)". The main area displays a "Note by Tristan Storr" dated "Jan 7, 2026 at 1:46 PM MST". The note content is highlighted with an orange border and includes sections: "PPC Build Notes", "First on Record?" (Yes), "General Account Information", "Unresolved Action Items", "Build & Strategy", "LP Attribution", "Audit Attribution", and "Client Goals". At the bottom of the note is an "Add comment" button and a "1 association" link. On the right, there is a "Services (1)" section showing "Test Company (A) - PPC" with details like "Product Status: Active", "Product Type: PPC", and "Owner: Tristan Storr". Below that is a "Companies (1)" section showing "TEST ACCOUNT" as the primary company with domain "testacc" and phone number "7026729658".

STEP 8

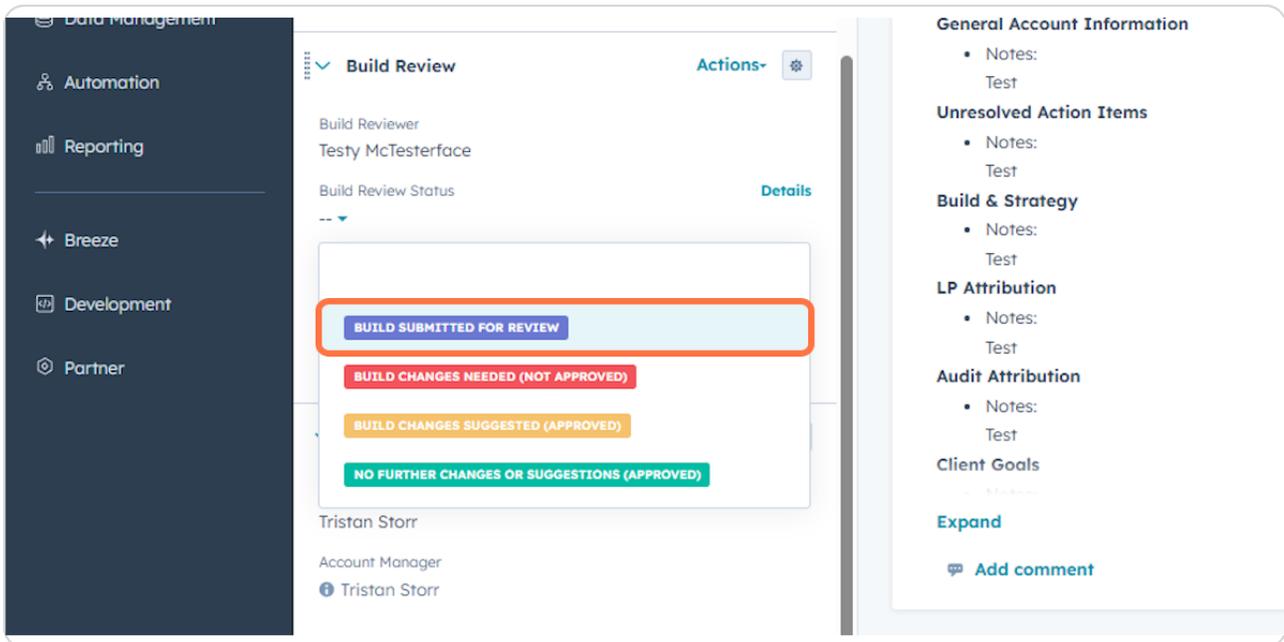
To submit the notes and build for review, the Product Specialist will modify the Build Review Status dropdown.



The screenshot shows a project record interface with a dark sidebar on the left containing menu items: Service, Data Management, Automation, Reporting, Breeze, Development, and Partner. The main area shows a "Build Review" section with "Build Reviewer: Testy McTesterface" and "Build Review Status" dropdown highlighted with an orange border. The dropdown menu is open, showing "--" as the selected option. Below the dropdown are "Date entered" and "Date exited" fields for the "Build Review (Paid Media Operations - On-Boarding)". The "Project Owners" section below shows "Owner: Tristan Storr". On the right, the "PPC Build Notes" content is visible, including sections like "First on Record?", "General Account Information", "Unresolved Action Items", "Build & Strategy", "LP Attribution", "Audit Attribution", and "Client Goals".

STEP 9

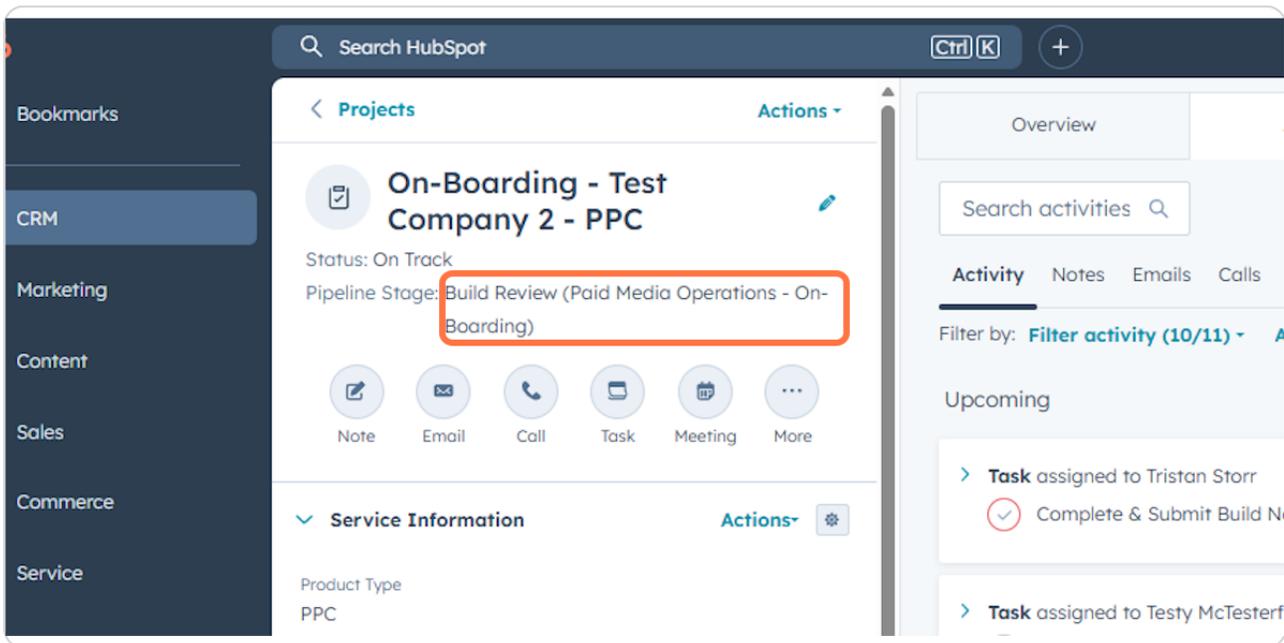
Select BUILD SUBMITTED FOR REVIEW



The screenshot shows a 'Build Review' interface. On the left is a dark sidebar with navigation items: Data Management, Automation, Reporting, Breeze, Development, and Partner. The main content area is titled 'Build Review' and includes 'Build Reviewer: Testy McTesterface' and 'Build Review Status: Details'. A list of build statuses is displayed, with the first item, 'BUILD SUBMITTED FOR REVIEW', highlighted with a red rectangular box. Other statuses include 'BUILD CHANGES NEEDED (NOT APPROVED)', 'BUILD CHANGES SUGGESTED (APPROVED)', and 'NO FURTHER CHANGES OR SUGGESTIONS (APPROVED)'. Below the list, the user 'Tristan Storr' is identified as the 'Account Manager'. On the right side, there is a 'General Account Information' panel with sections for 'Notes', 'Unresolved Action Items', 'Build & Strategy', 'LP Attribution', 'Audit Attribution', and 'Client Goals'. An 'Expand' button and an 'Add comment' button are also visible.

STEP 10

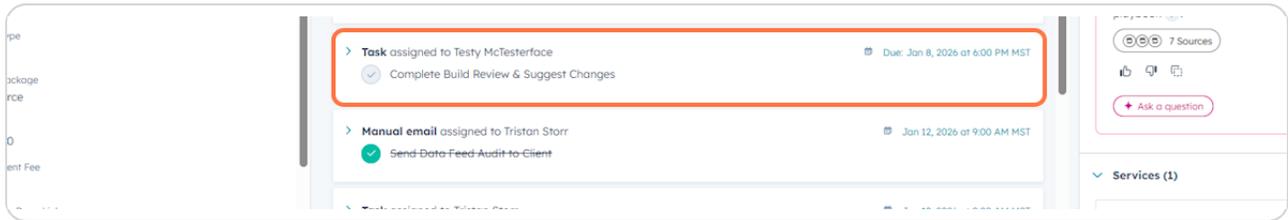
The Pipeline Stage will change itself automatically to Build Review



The screenshot shows the HubSpot interface for a project named 'On-Boarding - Test Company 2 - PPC'. The project status is 'On Track'. The 'Pipeline Stage' is 'Build Review (Paid Media Operations - On-Boarding)', which is highlighted with a red rectangular box. Below the project name are icons for 'Note', 'Email', 'Call', 'Task', 'Meeting', and 'More'. The 'Service Information' section shows 'Product Type: PPC'. On the right, there is an 'Activity' panel with a search bar and a list of activities. The first activity is 'Task assigned to Tristan Storr' with a 'Complete & Submit Build' status. The second activity is 'Task assigned to Testy McTesterf'. The top of the interface includes a 'Search HubSpot' bar and a '+ Ctrl K' button.

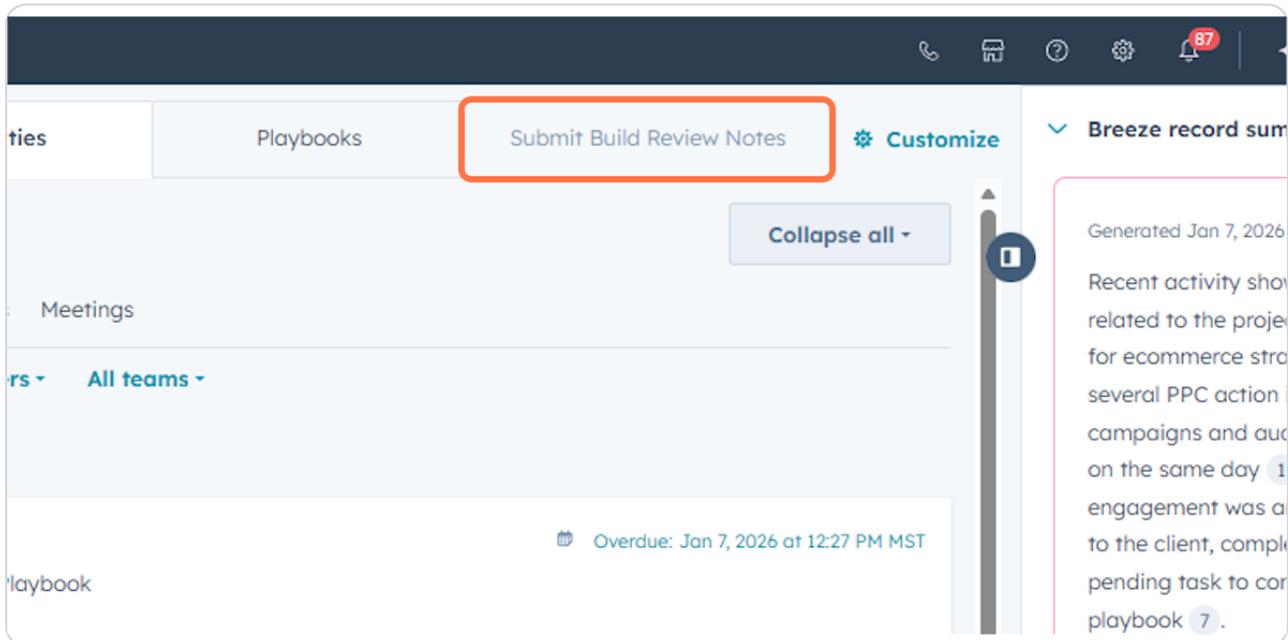
STEP 11

A new task will be created automatically and assign itself to the user listed in the Build Reviewer field.



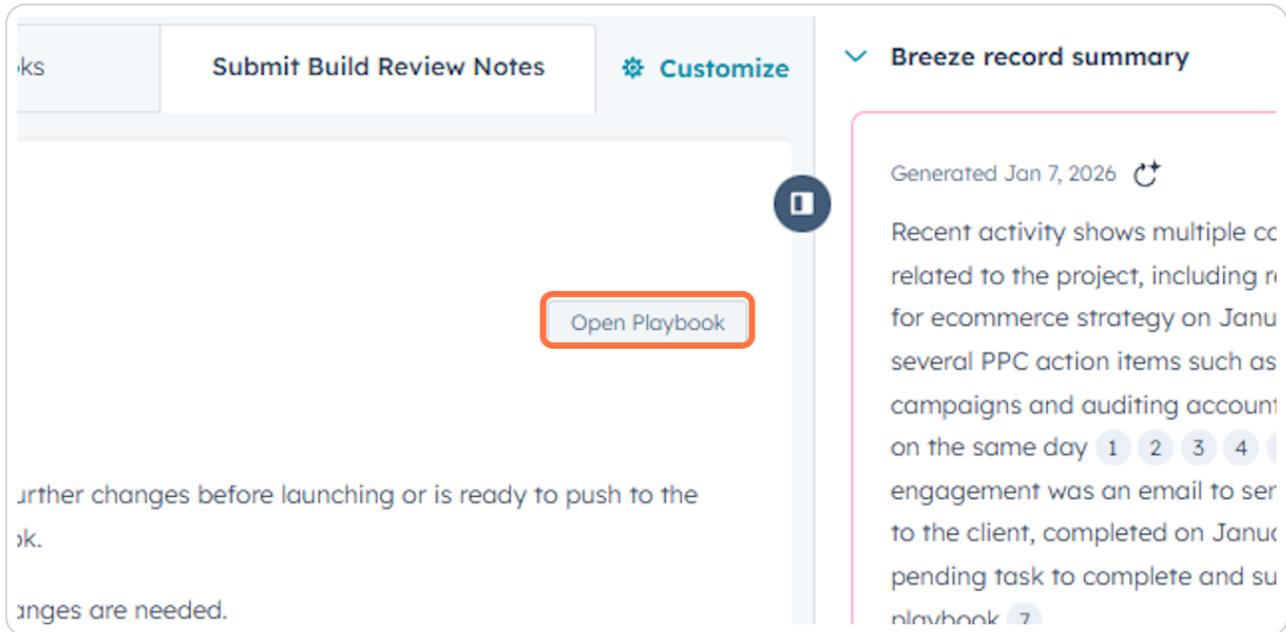
STEP 12

When the Team Lead or Reviewer is ready to complete the Build Review, navigate to the On-Boarding Project and select Submit Build Review Notes to access the Build Review Playbook.



STEP 13

Click on Open Playbook



Submit Build Review Notes Customize

Open Playbook

Breeze record summary

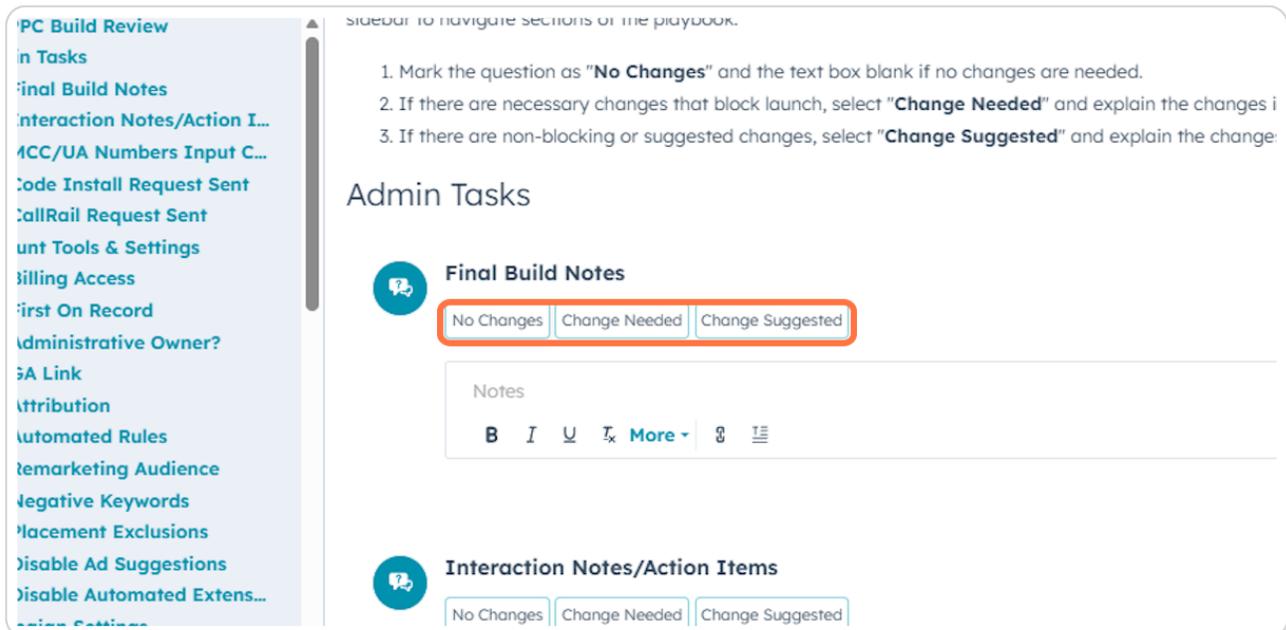
Generated Jan 7, 2026

Recent activity shows multiple cc related to the project, including r for ecommerce strategy on Janu several PPC action items such as campaigns and auditing account on the same day **1** **2** **3** **4** **5**

engagement was an email to ser to the client, completed on Janu pending task to complete and su nplaybook **7**

STEP 14

Fill out each field with "No Changes", "Change Needed", or "Change Suggested". Add context in the text fields if needed.



PC Build Review
in Tasks
Final Build Notes
Interaction Notes/Action I...
ACC/UA Numbers Input C...
Code Install Request Sent
CallRail Request Sent
unt Tools & Settings
Billing Access
First On Record
Administrative Owner?
SA Link
Attribution
Automated Rules
Remarketing Audience
Negative Keywords
Placement Exclusions
Disable Ad Suggestions
Disable Automated Extens...
Review Settings

sidebar to navigate sections of the playbook.

1. Mark the question as **"No Changes"** and the text box blank if no changes are needed.
2. If there are necessary changes that block launch, select **"Change Needed"** and explain the changes i
3. If there are non-blocking or suggested changes, select **"Change Suggested"** and explain the change

Admin Tasks

Final Build Notes

No Changes Change Needed Change Suggested

Notes

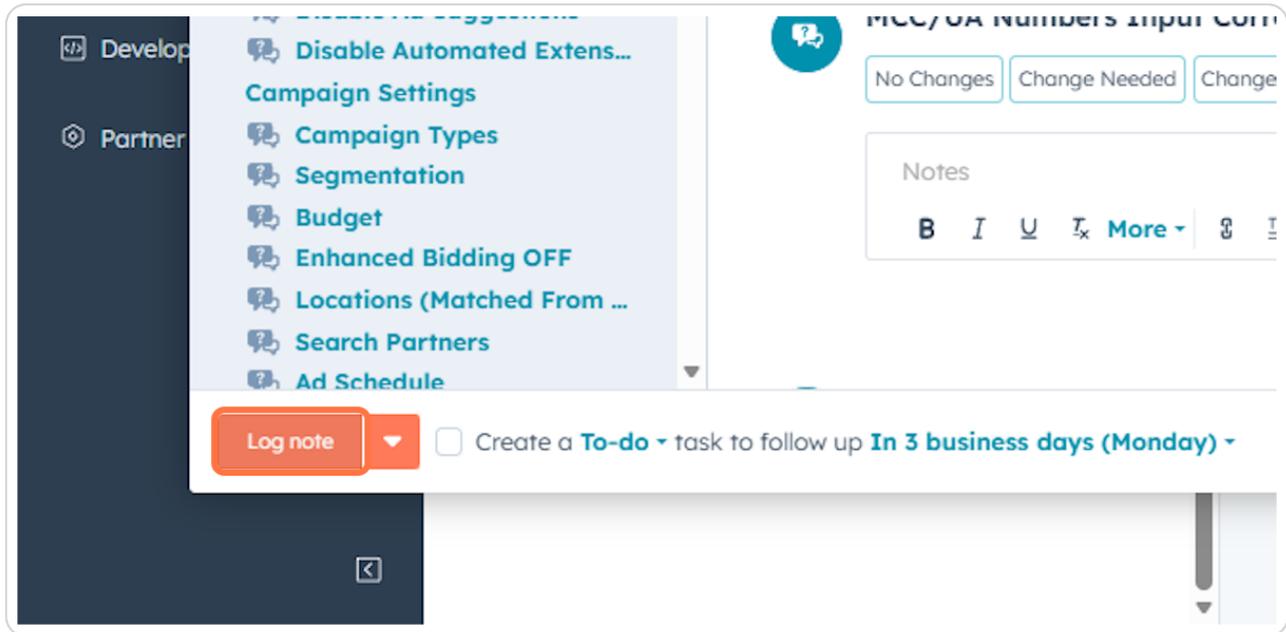
B *I* U ~~X~~ More

Interaction Notes/Action Items

No Changes Change Needed Change Suggested

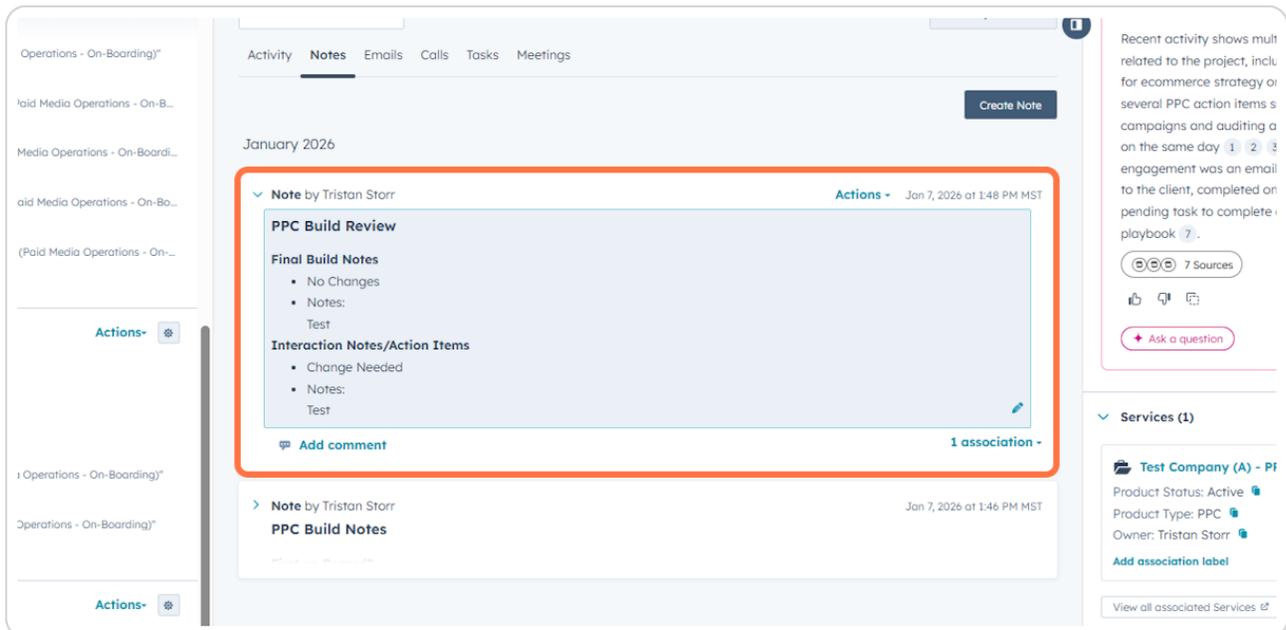
STEP 15

When the Reviewer has completed the Build Review, they will hit "Log Note" to save the review as an activity on the On-Boarding project.



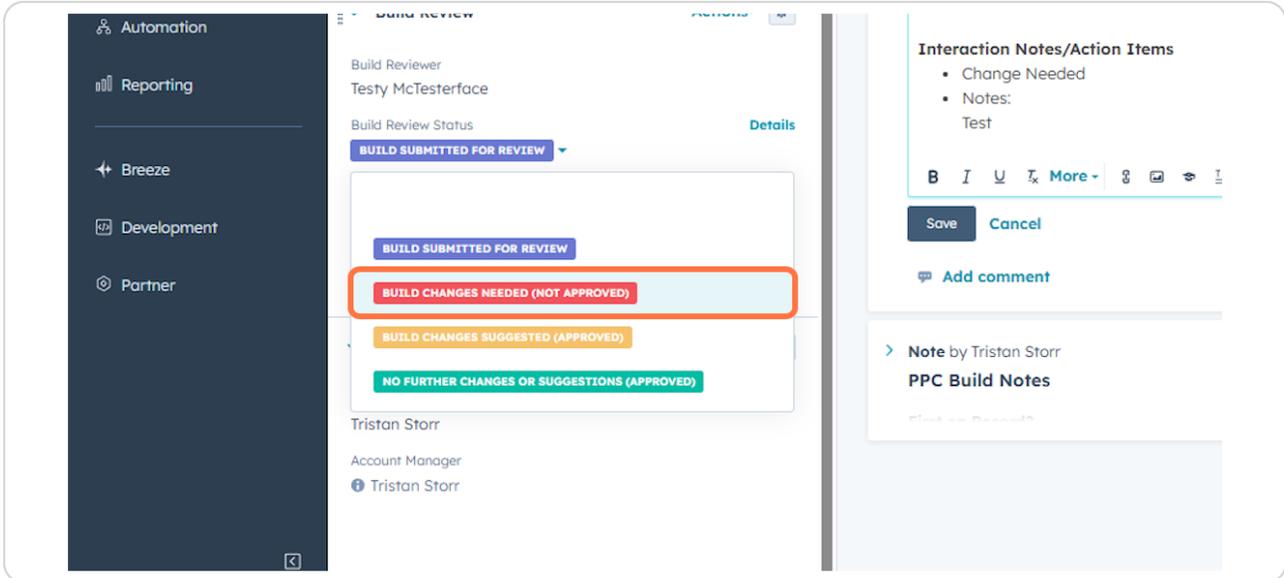
STEP 16

Note is visible in the On-Boarding Activity Feed



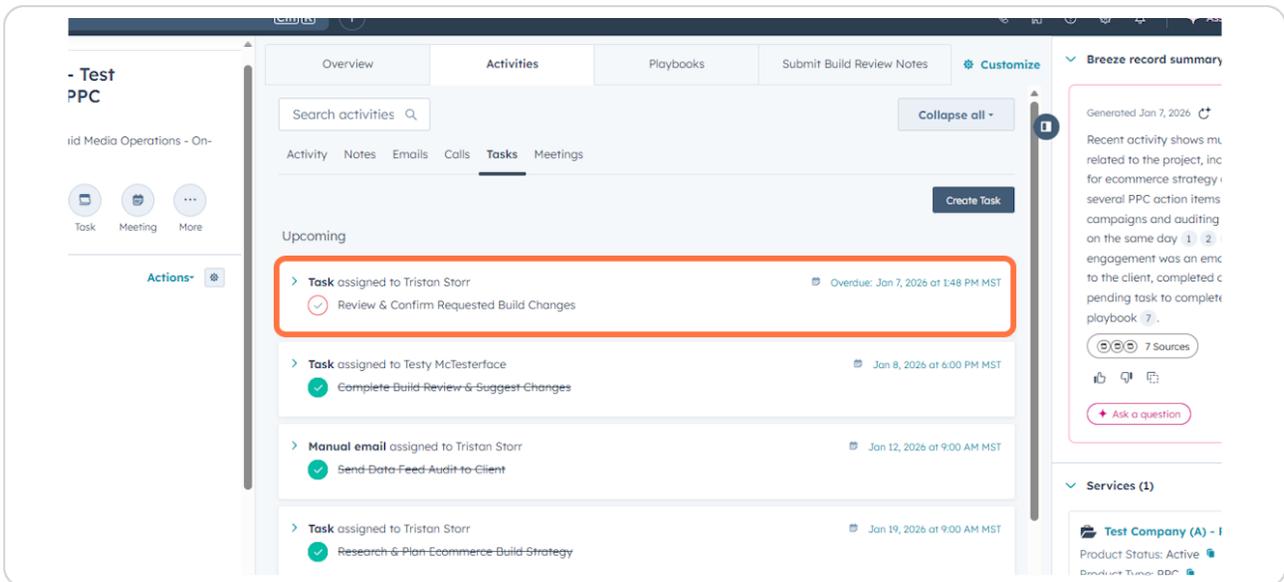
STEP 17

Finally, the Reviewer will make a decision on Build Approval by using the Build Review Status field. IF Changes are Required, move Status to Build Changes Needed (Not Approved). IF Build is approved, select the appropriate Approved status



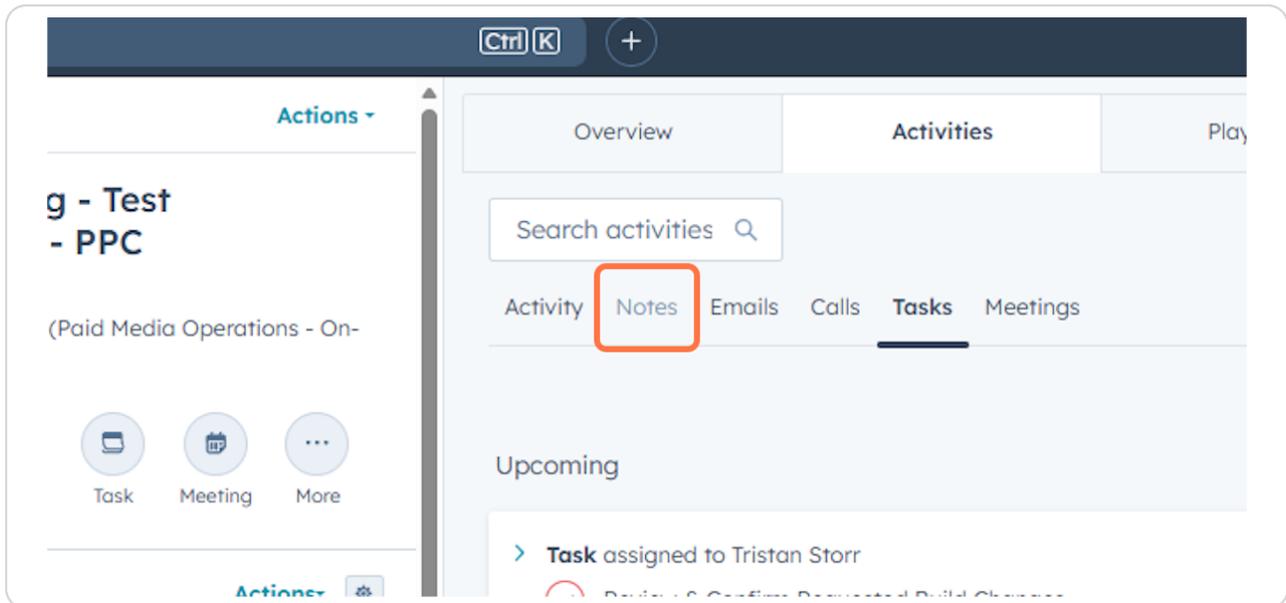
STEP 18

IF not approved, a new task will be automatically created for the Product Specialist to implement requested changes and re-submit for review.



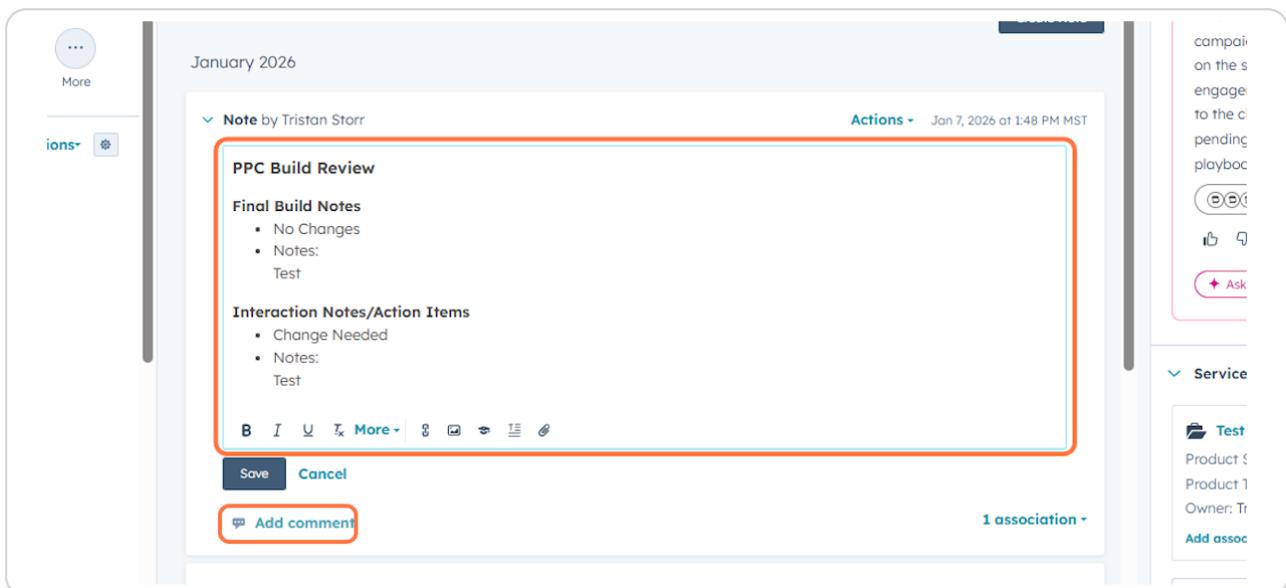
STEP 19

The Product Specialist can find the Build Review notes on the Activity feed of the Project. Use the Notes filter to find the activity more easily.



STEP 20

Product Specialists can update the text of their original Build Review activity with the updates OR add a comment to the original Build Review activity, noting the updates.



STEP 21

Once updates are completed, re-submit for review using the Build Review Status field.

The screenshot shows the 'Build Review' interface. On the left is a navigation sidebar with options: Data Management, Automation, Reporting, Breeze, Development, and Partner. The main content area shows 'Build Review' for 'Testy McTesturface'. The 'Build Review Status' dropdown menu is open, displaying four options: 'BUILD CHANGES NEEDED (NOT APPROVED)' (selected), 'BUILD SUBMITTED FOR REVIEW' (highlighted with an orange box), 'BUILD CHANGES SUGGESTED (APPROVED)', and 'NO FURTHER CHANGES OR SUGGESTIONS (APPROVED)'. Below the dropdown, the user 'Tristan Storr' is listed as the 'Account Manager'. On the right, there are sections for 'Notes' (containing 'Test'), 'Interaction Notes/Action Items' (containing 'Change Needed' and 'Notes: Test'), and a comment section by 'Tristan Storr' with the text 'Send your colleague a notification comments.'.

STEP 22

A new task will be generated for the Reviewer again for completing the review.

The screenshot shows the 'Tasks' view in a project management tool. The 'Upcoming' section lists several tasks. The task 'Complete Build Review & Suggest Changes' assigned to 'Testy McTesturface' is highlighted with an orange box. It is due on 'Jan 8, 2026 at 6:00 PM MST'. Other tasks include 'Send Data Feed Audit to Client' assigned to 'Tristan Storr' (due Jan 12, 2026), 'Research & Plan E-commerce Build Strategy' assigned to 'Tristan Storr' (due Jan 19, 2026), and 'Implement Non-Shopping Campaigns in Google Ads' assigned to 'Tristan Storr' (due Jan 19, 2026). The right sidebar shows a 'Generated' date of Jan 7, 2026 and a 'Services' section for 'Test Company (A) - F' with details like 'Product Status: Active', 'Product Type: PPC', and 'Owner: Tristan Storr'.

STEP 23

Similar to the Product Specialist updating their Build Notes, the Reviewer can update their Build Review note or add a comment to add additional information.

The screenshot shows a 'Note by Tristan Storr' titled 'PPC Build Review' from January 2026. The note is highlighted with a red border and contains two sections: 'Final Build Notes' and 'Interaction Notes/Action Items'. Both sections list 'No Changes' and 'Notes: Test'. The interface includes a 'Create Note' button at the top right, a 'Save' button at the bottom left of the note editor, and a 'Cancel' button at the bottom right. A 'Hide comments' button and '1 association' link are visible below the note. On the right side, there is a sidebar with 'Services (1)' including 'Test Company (A)' with details like 'Product Status: Active' and 'Product Type: PPC'. A comment area at the bottom shows a notification prompt for Tristan Storr.

STEP 24

Reviewer makes Approval determination.

The screenshot displays the 'Build Review Status' for 'Testy McTesterface' by 'Tristan Storr', an Account Manager. The status is 'BUILD SUBMITTED FOR REVIEW'. A list of four status options is shown: 'BUILD SUBMITTED FOR REVIEW' (blue), 'BUILD CHANGES NEEDED (NOT APPROVED)' (red), 'BUILD CHANGES SUGGESTED (APPROVED)' (orange), and 'NO FURTHER CHANGES OR SUGGESTIONS (APPROVED)' (green), which is highlighted with a red border. A sidebar on the left contains navigation options: Reporting, Breeze, Development, and Partner. On the right, there is a 'Interaction Notes/Action Items' section with 'Change Needed' and 'Notes: Test', and a comment area for Tristan Storr with a 'Save' button.

STEP 25

IF Build is moved to an Approved status, the Pipeline Stage will move to Build Completed automatically. At this stage, new tasks will be generated for the AM to schedule launch call. No action is needed from the Specialist until the Campaigns are launched.

The screenshot displays the HubSpot CRM interface for a project titled "On-Boarding - Test Company 2 - PPC". The project status is "On Track". The pipeline stage is "Build Completed (Paid Media Operations - On-Boarding)", which is highlighted with a red box. Below the project name, there are icons for Note, Email, Call, Task, Meeting, and More. The "Service Information" section shows the product type as "PPC". On the right side, the "Overview" tab is active, showing a search bar for activities and a list of upcoming tasks, including "Task assigned to Testy McTesterf" and "Complete Build Review & St".

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