

# Manage Paid Media Builds in HubSpot

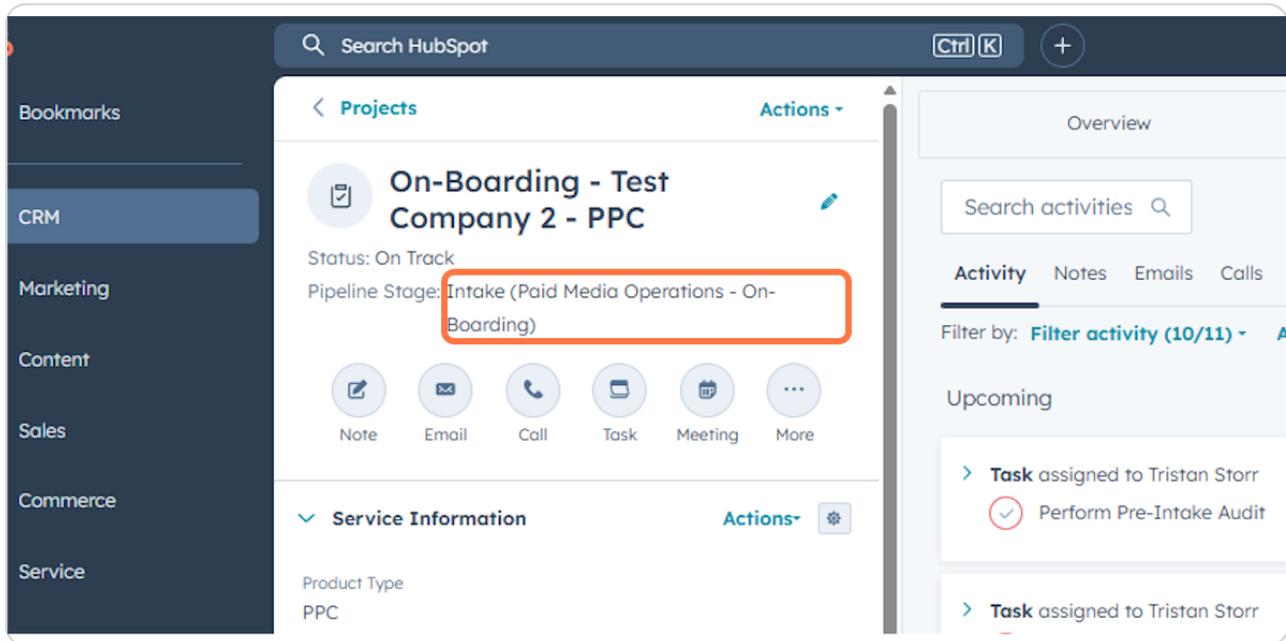
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Created by	Creation Date	Last Updated
LP Team	Jan 07, 2026	Jan 08, 2026

## STEP 1

**Product Specialists, once assigned to a Service, will have an On-Boarding Project created for them. On-Boarding Projects will begin in the "Intake" stage.**



## STEP 2

3 Tasks will be generated for the Product Specialist. Two will be Pre-Intake tasks that are optional based on bandwidth and Intake timeline. The other is a task due in a few days time for reviewing Post-Intake notes and Support Tickets.

The screenshot shows the HubSpot interface for a record titled "On-boarding - Test Company 2 - PPC". The "Activities" tab is active, displaying a list of tasks. The tasks are:

- Task assigned to Tristan Storr: Perform Pre-Intake Audit (Overdue: Jan 7, 2026 at 12:21 PM MST)
- Task assigned to Tristan Storr: Share Pre-Intake Suggestions With AM (Overdue: Jan 7, 2026 at 12:21 PM MST)
- Task assigned to Tristan Storr: Review Post Intake Notes & Support Tickets (Due: Jan 12, 2026 at 9:00 AM MST)

The third task, "Review Post Intake Notes & Support Tickets", is highlighted with a red box. The interface also shows a sidebar with navigation options (Email, Call, Task, Meeting, More) and a right-hand panel with a "Breeze record summary" and "Services (1)" section.

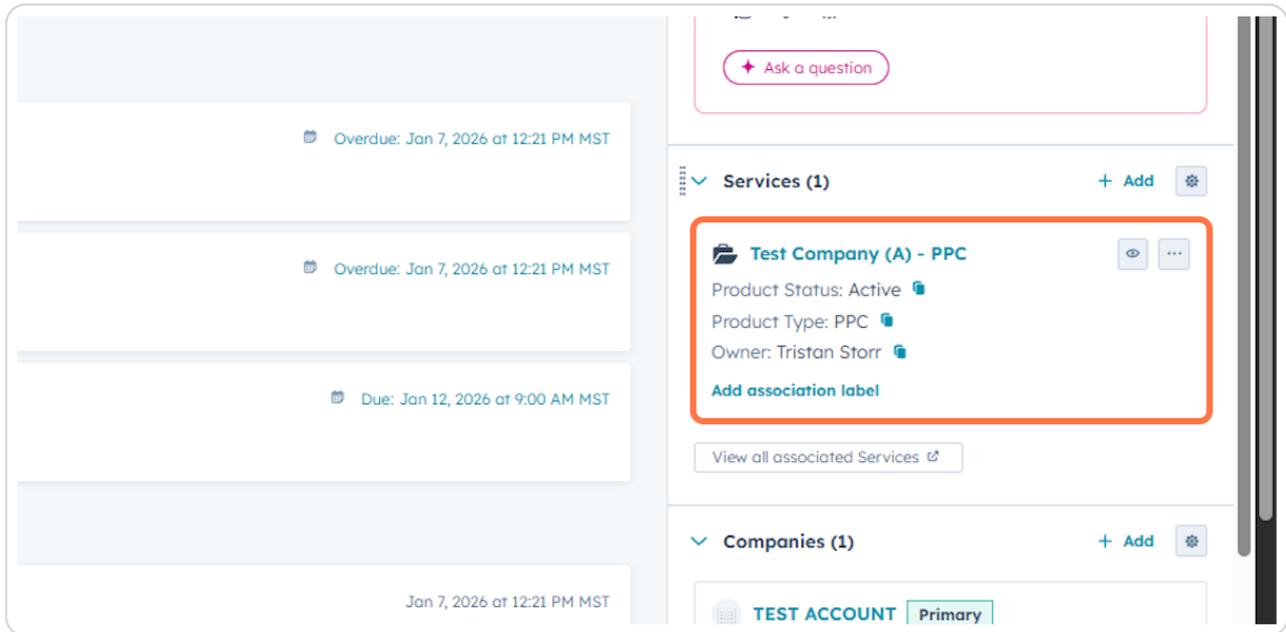
## STEP 3

The Product Specialist will be listed as the Owner of the Project.

The screenshot shows the "Project Owners" section in the HubSpot interface. The "Owner" field is highlighted with a red box and contains the name "Tristan Storr". Below the owner field, the "Account Manager" is listed as "Tristan Storr". The interface also shows a sidebar with navigation options (Reporting, Breeze, Development, Partner) and a right-hand panel with a "Task assigned to Tristan Storr" and "Workflow activity" sections.

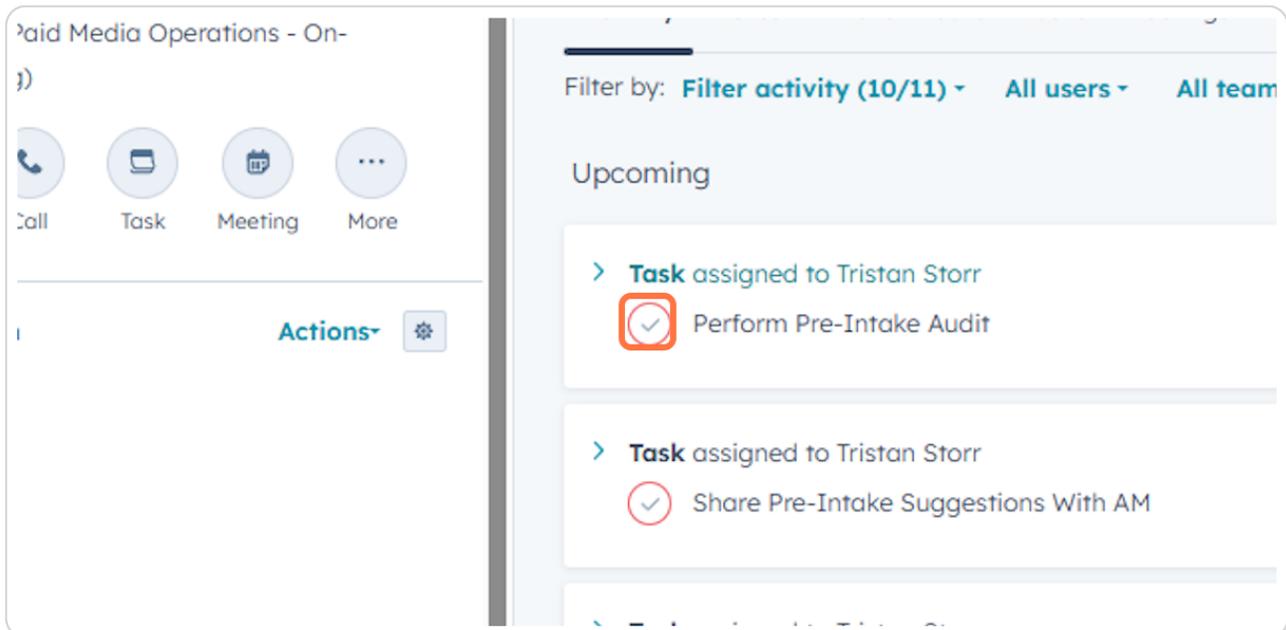
## STEP 4

The new Service will be associated with the Project.



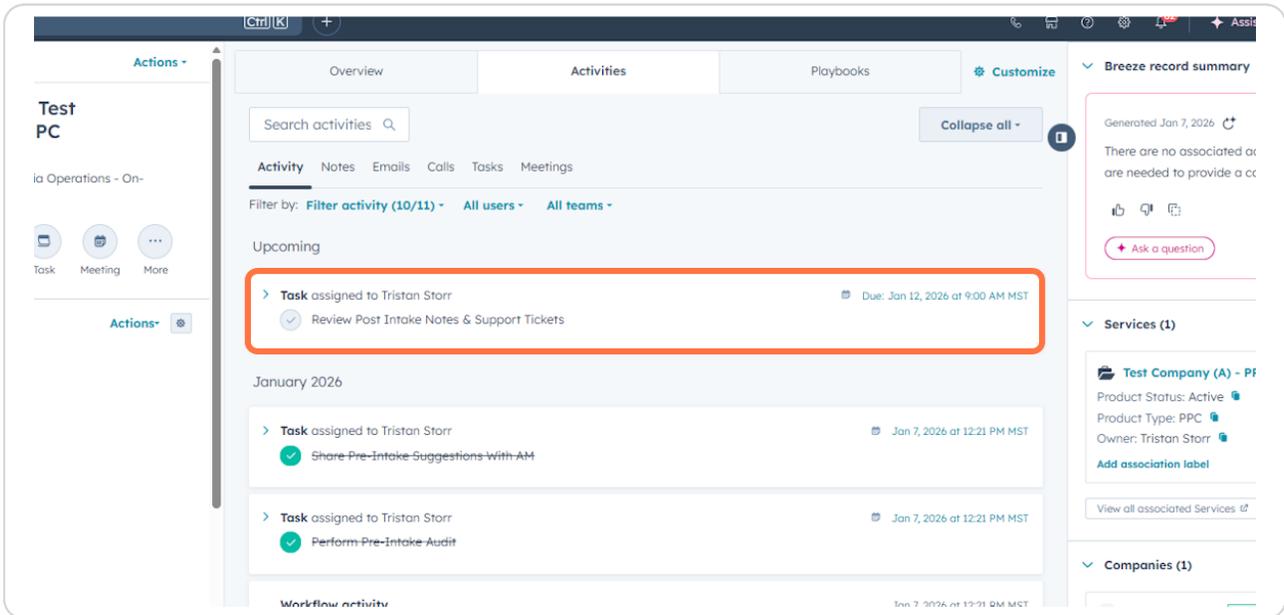
## STEP 5

Specialists can mark Tasks as complete by selecting the "Checkmark" icon on the Task card.



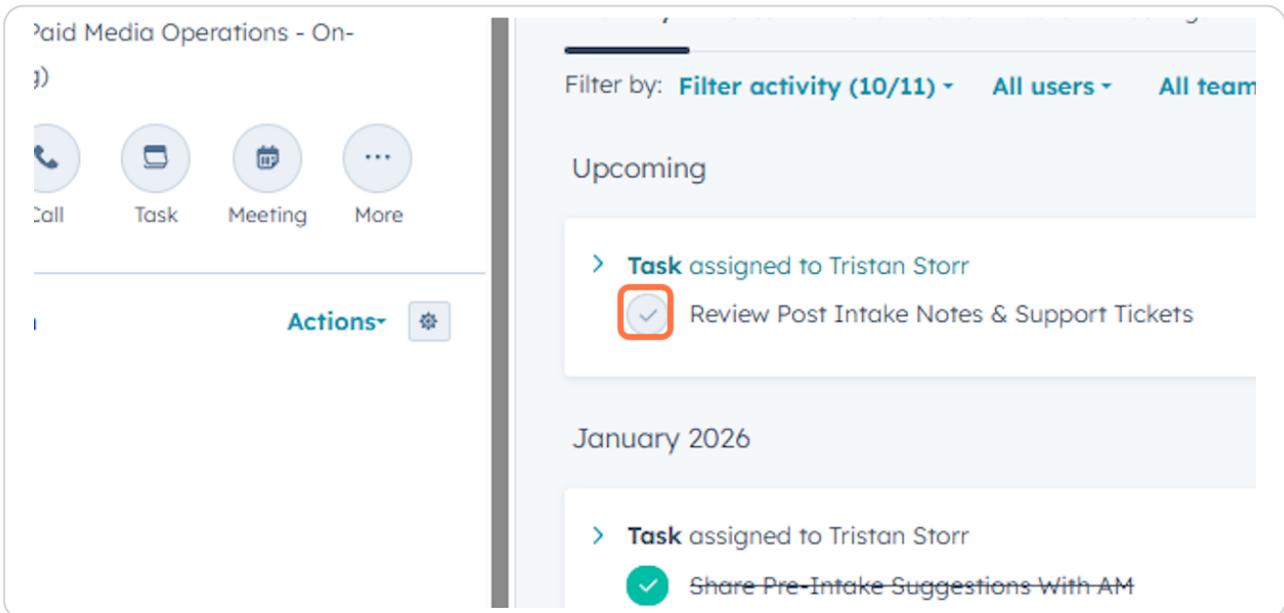
## STEP 6

When all Pre-Intake work is complete, the Specialist will await the completion of the Intake and Review the Notes & Support Tickets.



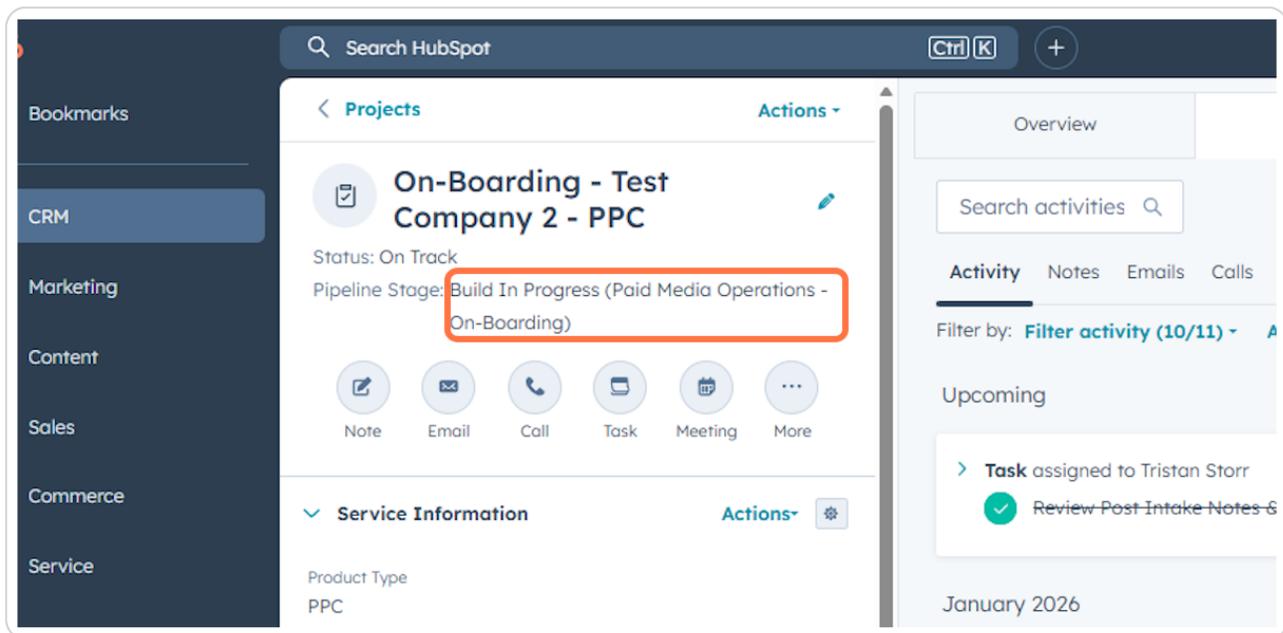
## STEP 7

Once the "Review Post-Intake Notes & Support Tickets" task is completed, the Project will move forward to Build In Progress.



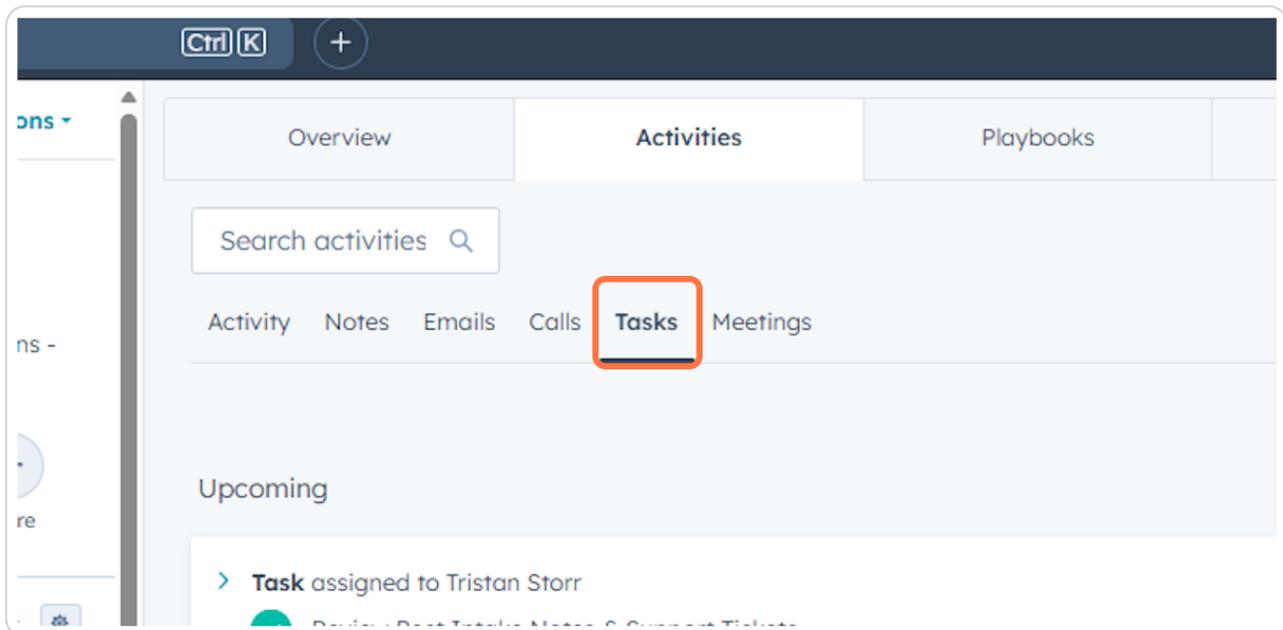
## STEP 8

Pipeline Stage will happen automatically.



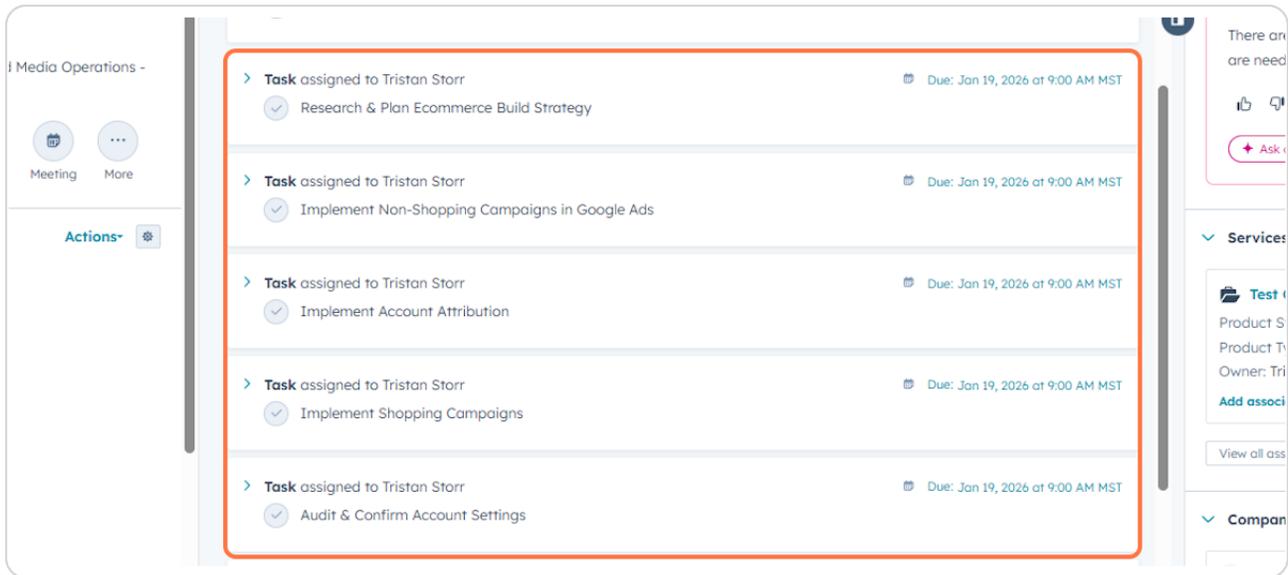
## STEP 9

On the Record, new Tasks will be generated and assigned to the Product Specialist.



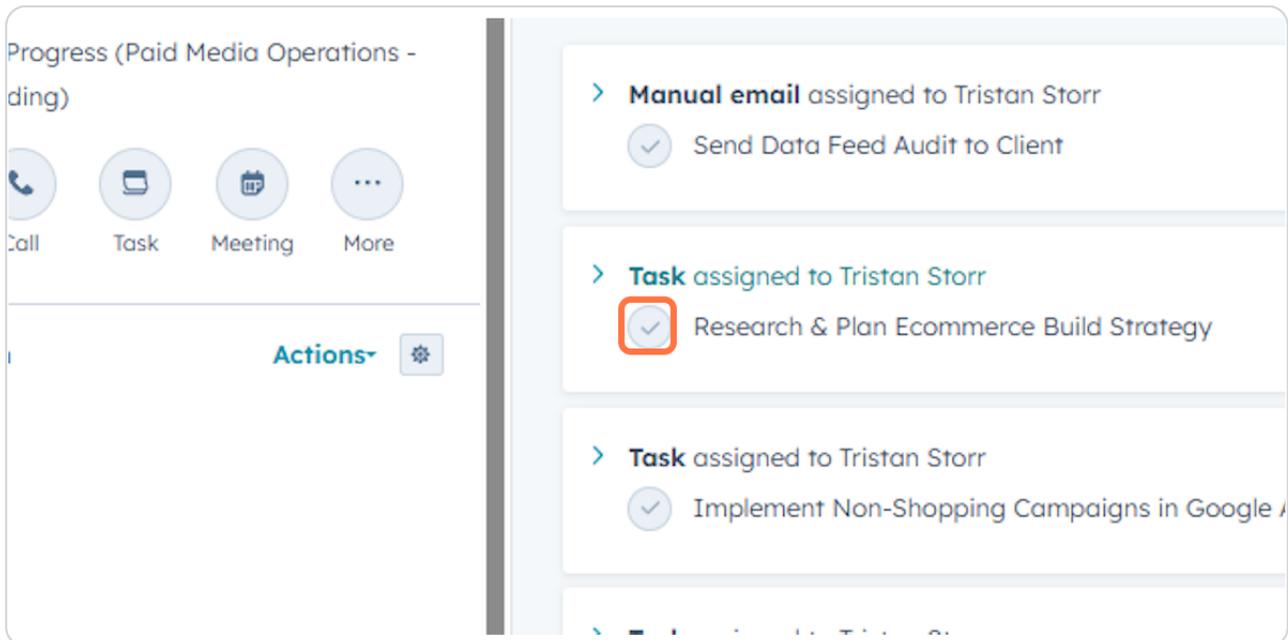
## STEP 10

Tasks will relate to general build milestones.



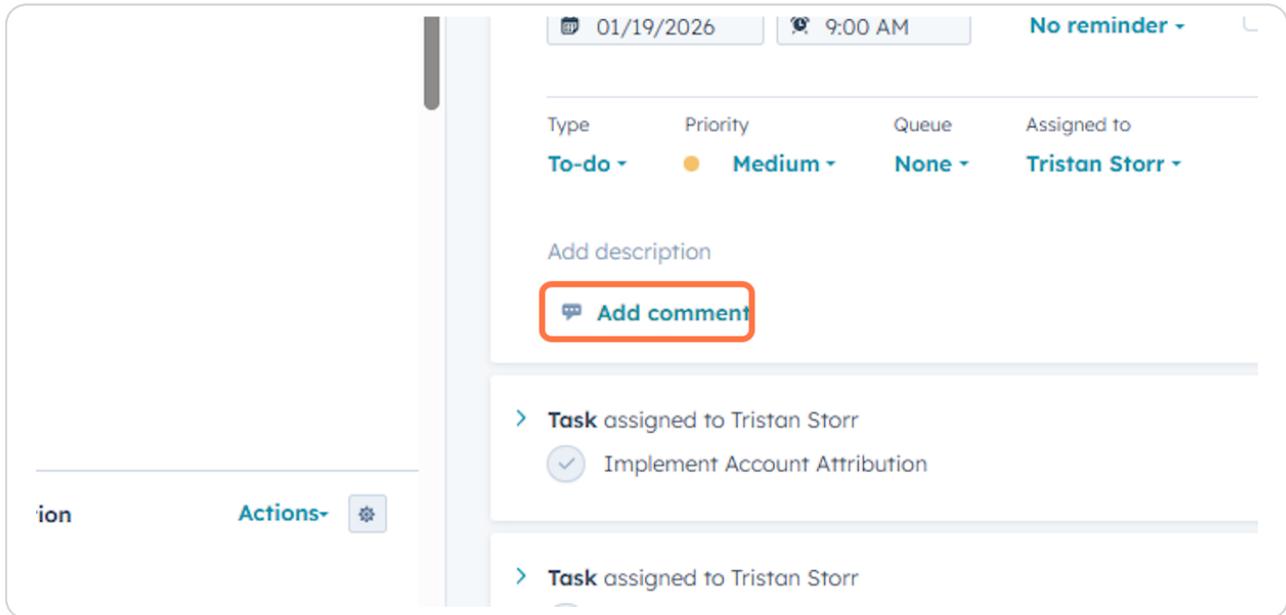
## STEP 11

The Specialist has the option to mark each task as complete as they work through each milestone of the build OR mark all tasks as complete once the entirety of the build is complete and ready for review.



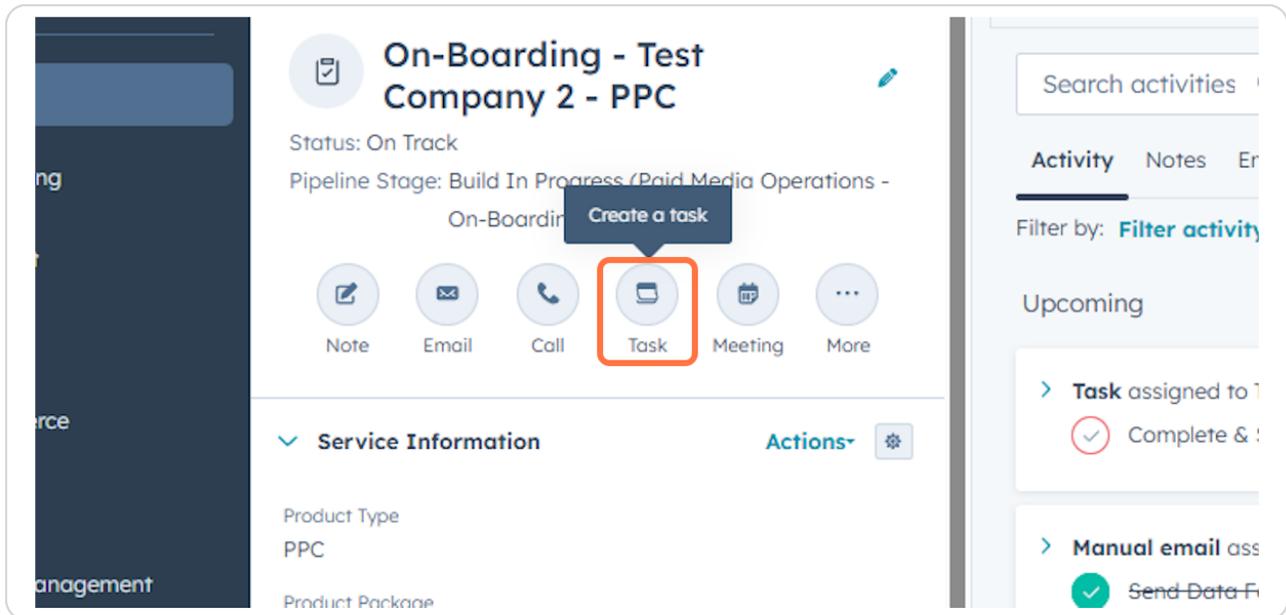
## STEP 12

**Product Specialists can add comments to Task activities to explain decisions or add context to different aspects of the build.**



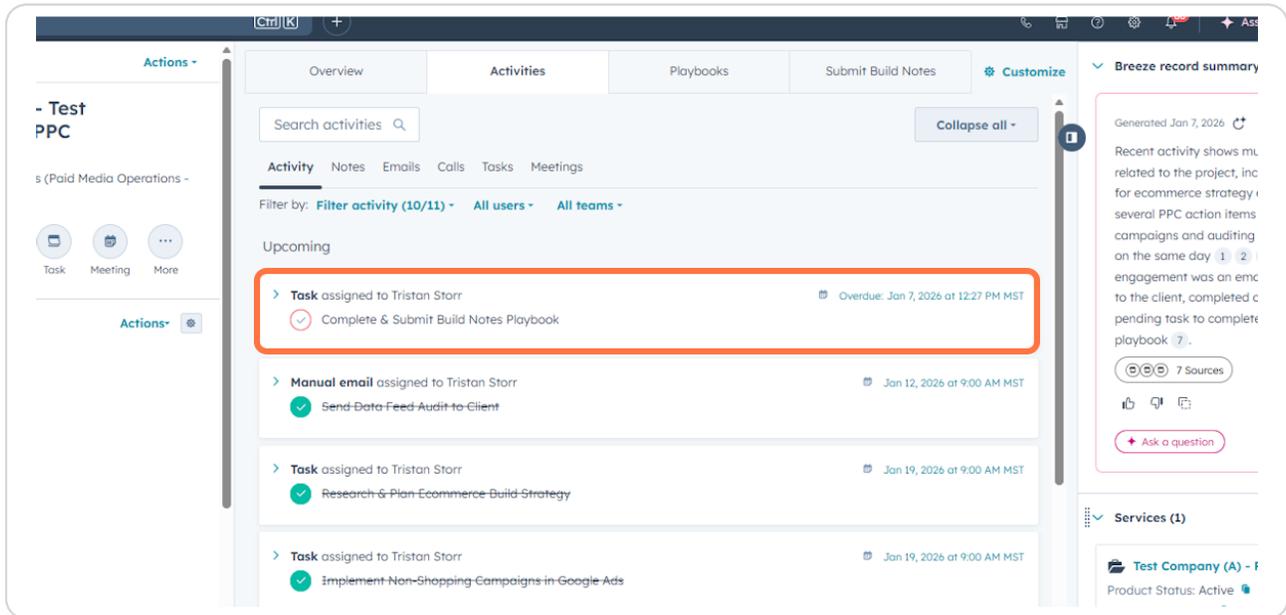
## STEP 13

**Product Specialist can create new tasks for themselves during the build process using the Task button in the Activity bar.**



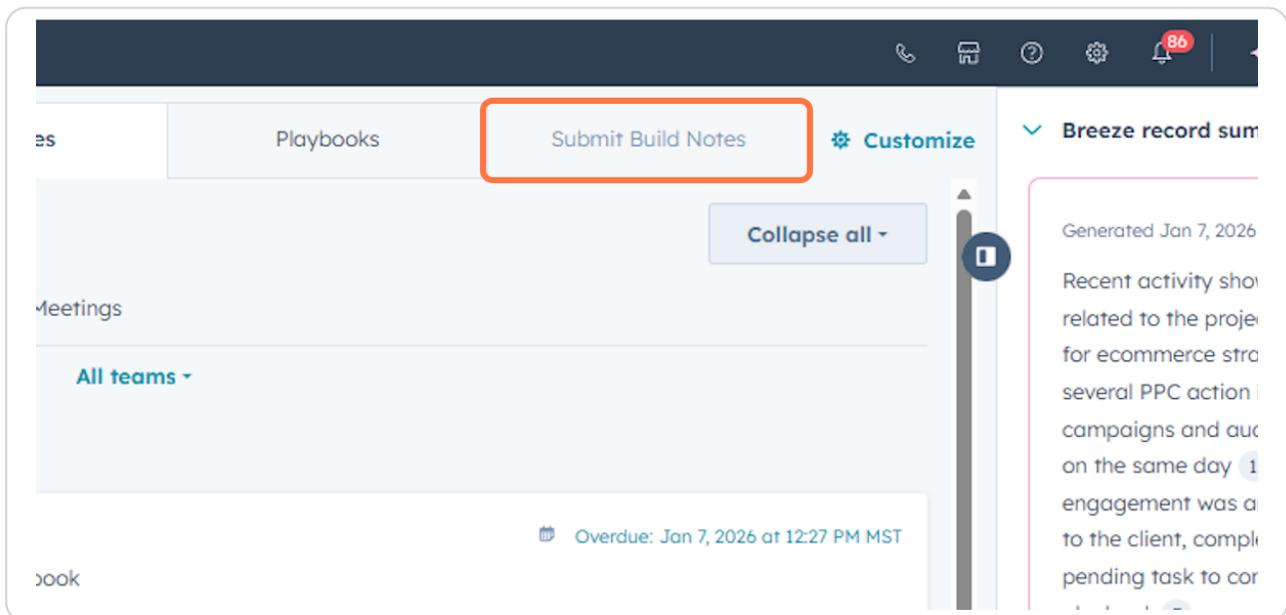
## STEP 14

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



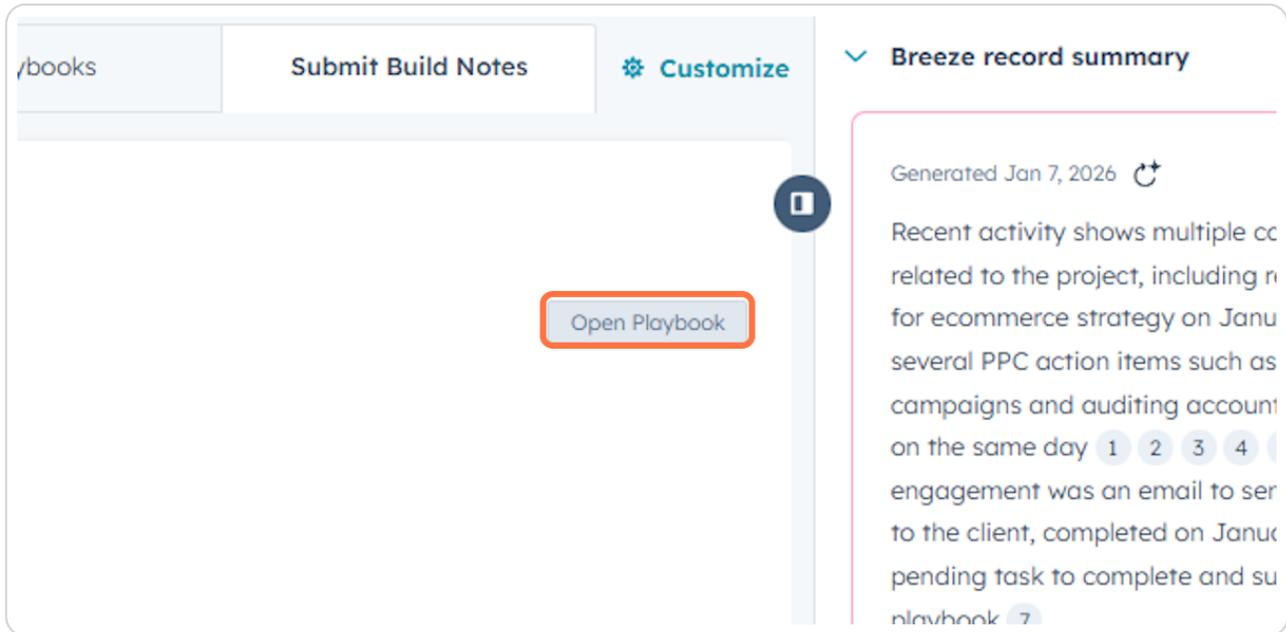
## STEP 15

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



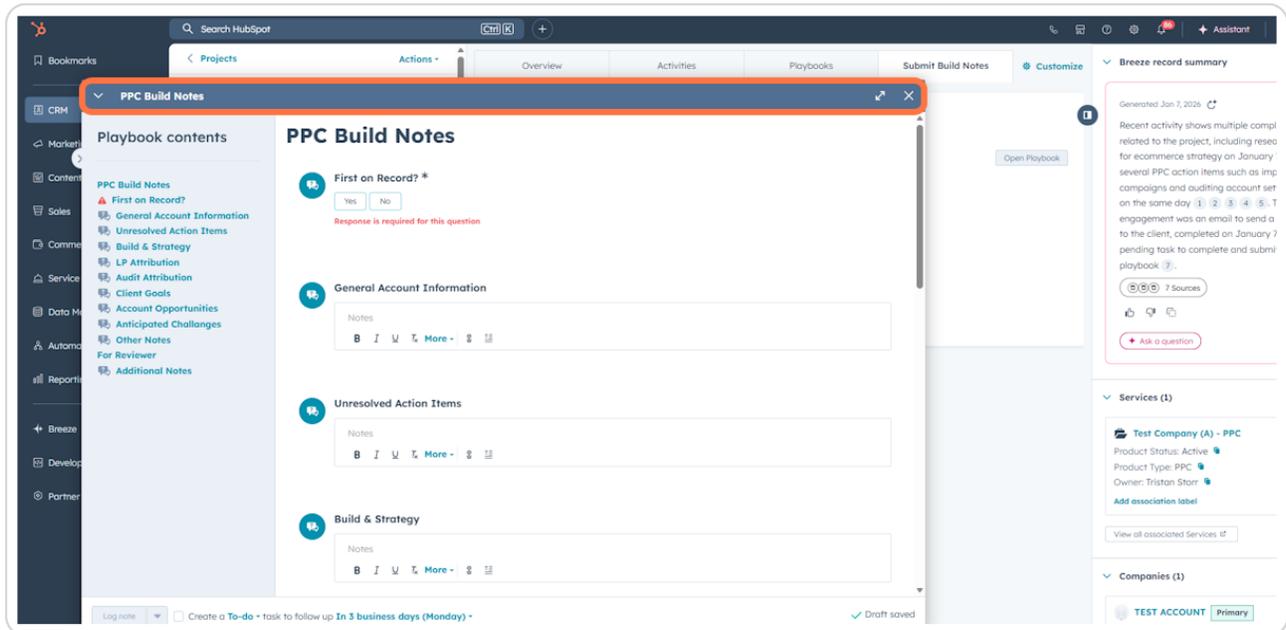
## STEP 16

### Click on Open Playbook



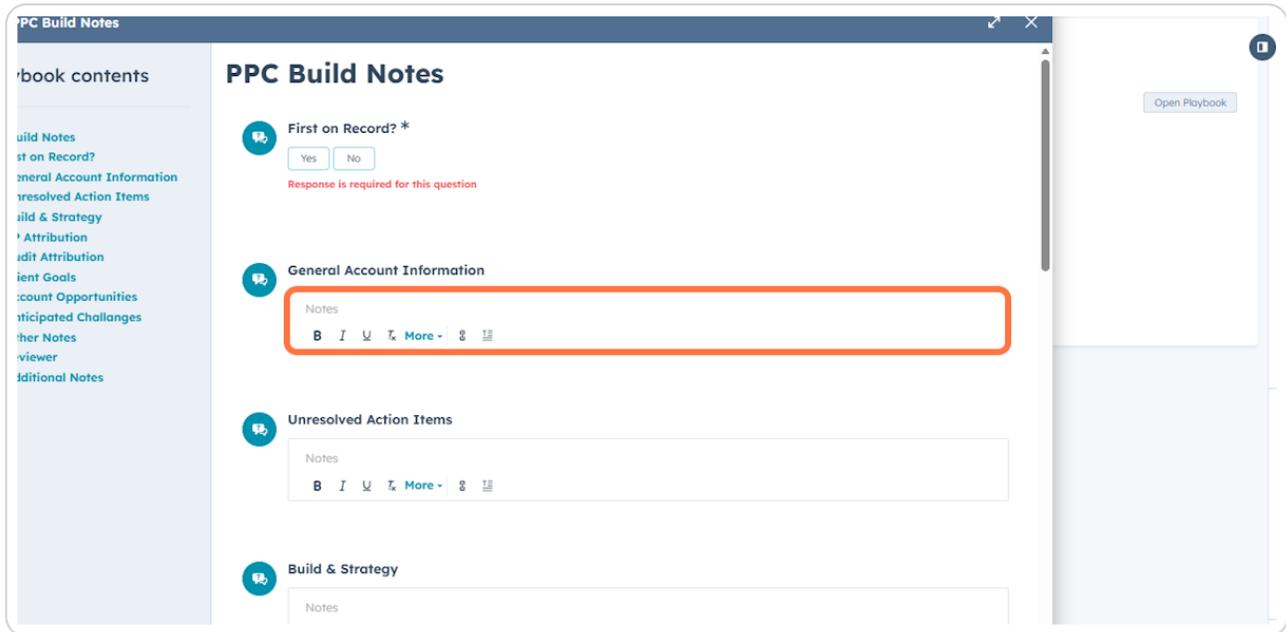
## STEP 17

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



## STEP 18

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.



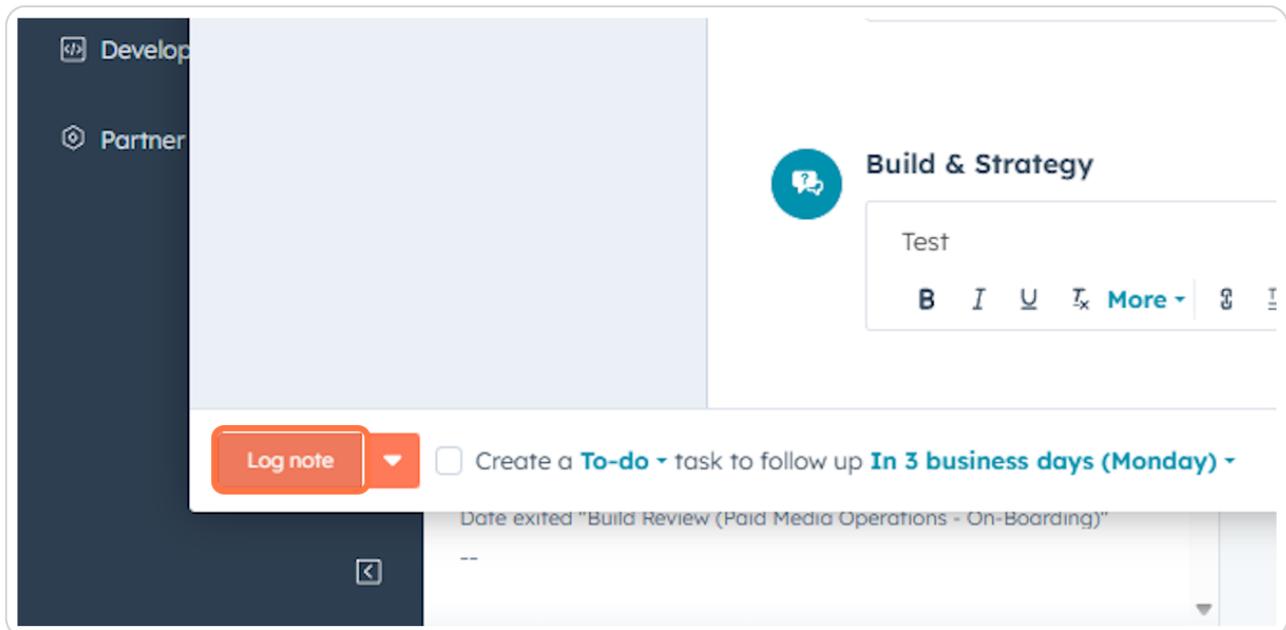
The screenshot shows a browser window titled "PPC Build Notes". On the left is a sidebar with a "Table of Contents" menu listing items like "Build Notes", "First on Record?", "General Account Information", "Unresolved Action Items", "Build & Strategy", "Attribution", "Adit Attribution", "Ident Goals", "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 and a red error message: "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 19

When complete, select Log Note to complete the Playbook.



This screenshot shows a close-up of the "Build & Strategy" section. It features a "Notes" text field containing the word "Test" and a rich text editor toolbar with buttons for Bold (B), Italic (I), Underline (U), Strikethrough (T), More (More), and other icons. 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 partially visible "Date" field with the text "Date exited 'Build Review (Paid Media Operations - On-Boarding)'" and a "--" value.

## STEP 20

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 content area is titled "January 2026" and contains a note by Tristan Storr. The note is titled "PPC Build Notes" and includes sections for "First on Record?", "General Account Information", "Unresolved Action Items", "Build & Strategy", "LP Attribution", "Audit Attribution", and "Client Goals". Each section has a "Notes:" field with the value "Test". At the bottom of the note is an "Add comment" button and a "1 association -" link. On the right side of the interface, there is a summary card for "Test Company (A) - PPC" with details like "Product Status: Active", "Product Type: PPC", and "Owner: Tristan Storr". Below this is a "Services (1)" section and a "Companies (1)" section with "TEST ACCOUNT" listed as the primary company.

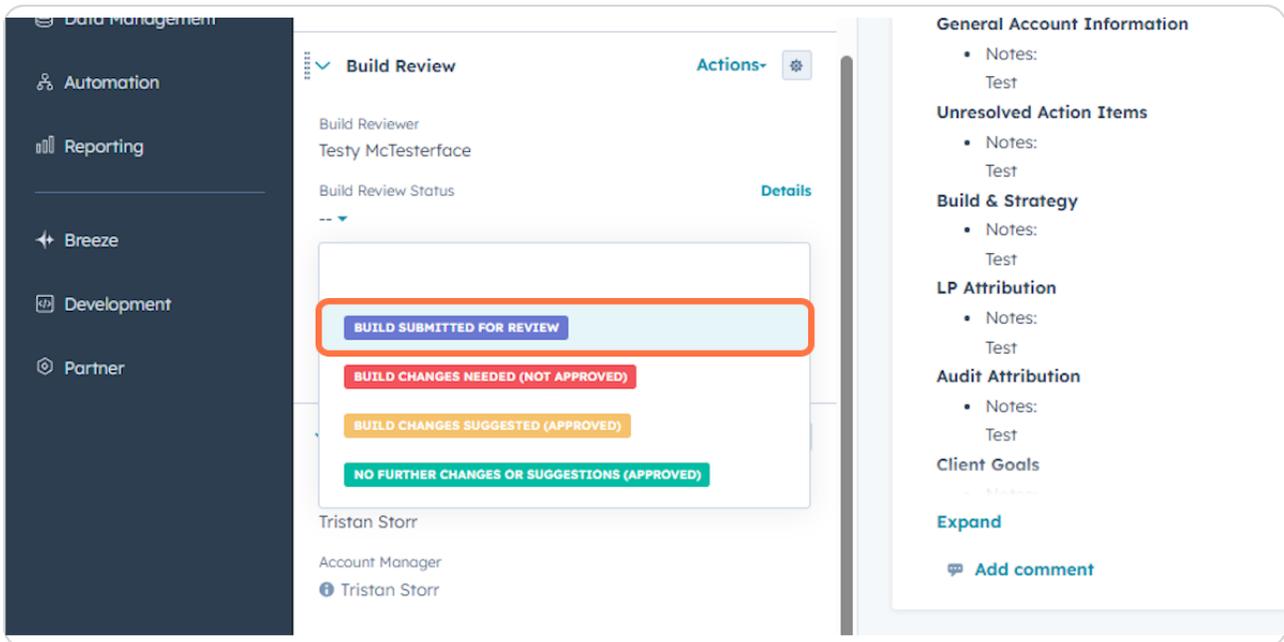
## STEP 21

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 sidebar on the left containing navigation items: Service, Data Management, Automation, Reporting, Breeze, Development, and Partner. The main content area is titled "Build Review" and shows details for a build reviewer named Testy McTesterface. The "Build Review Status" dropdown menu is open, showing a "--" option, which is highlighted with an orange box. Below the dropdown, there are fields for "Date entered 'Build Review (Paid Media Operations - On-Boarding)'" and "Date exited 'Build Review (Paid Media Operations - On-Boarding)'", both with "--" values. At the bottom, the "Project Owners" section lists Tristan Storr as the owner. On the right side, there is a "PPC Build Notes" section with the same structure as in Step 20, including sections for "First on Record?", "General Account Information", "Unresolved Action Items", "Build & Strategy", "LP Attribution", "Audit Attribution", and "Client Goals".

## STEP 22

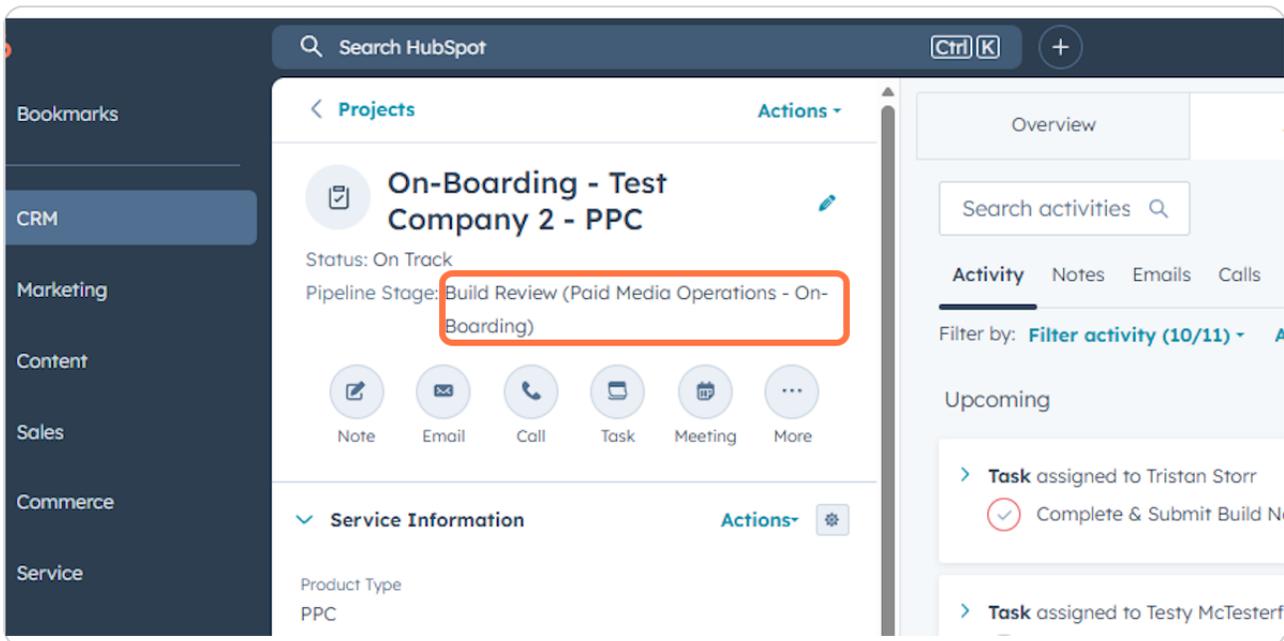
### Select BUILD SUBMITTED FOR REVIEW



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' link are also visible.

## STEP 23

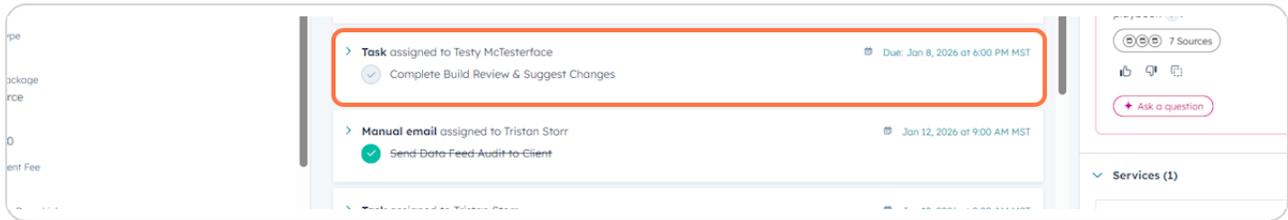
### The Pipeline Stage will change itself automatically to Build Review



The screenshot shows the HubSpot interface for a project named 'On-Boarding - Test Company 2 - PPC'. The status is 'On Track'. The 'Pipeline Stage' is highlighted with a red rectangular box and reads 'Build Review (Paid Media Operations - On-Boarding)'. 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 a task assigned to Tristan Storr, with a sub-item 'Complete & Submit Build N...'. The second activity is a task assigned to Testy McTesterf... The top navigation bar includes a search bar for HubSpot and a '+ Ctrl K' shortcut.

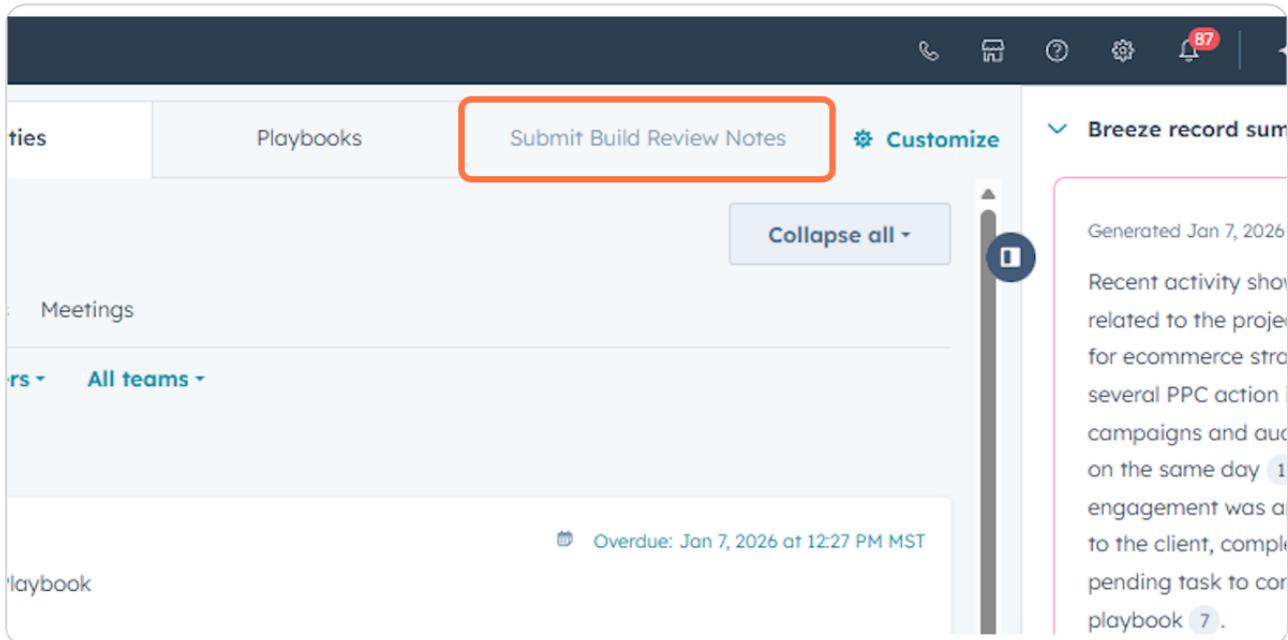
## STEP 24

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



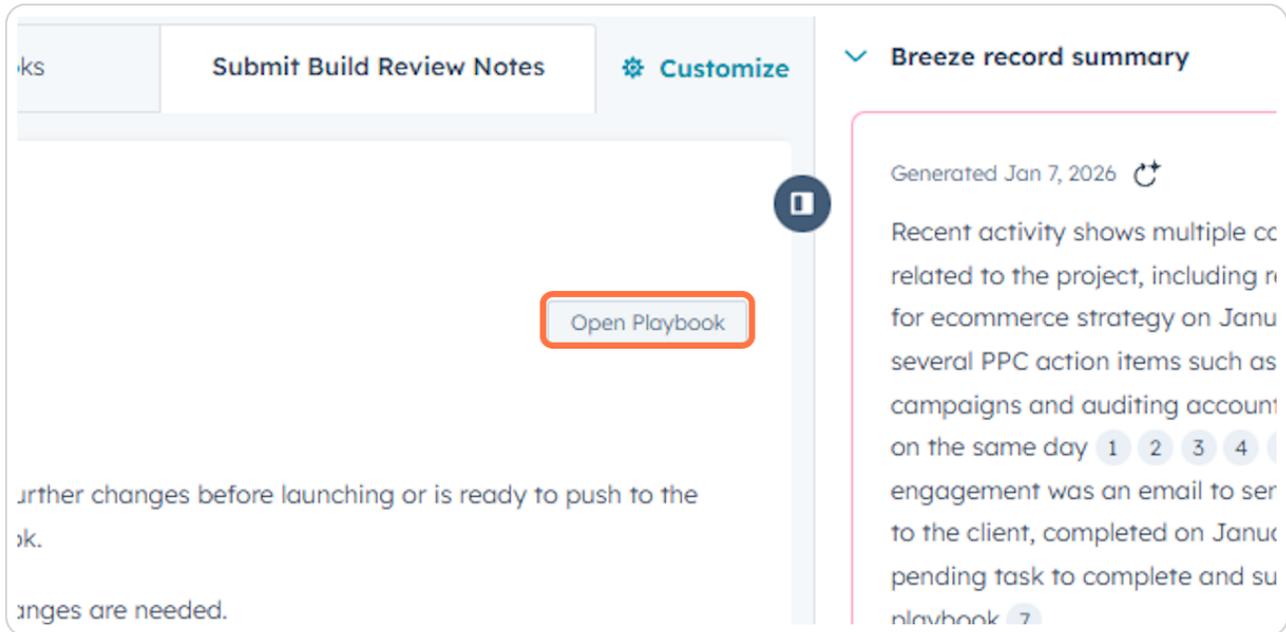
## STEP 25

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 26

### Click on Open Playbook



ks      Submit Build Review Notes      Customize

Open Playbook

Further changes before launching or is ready to push to the  
ok.

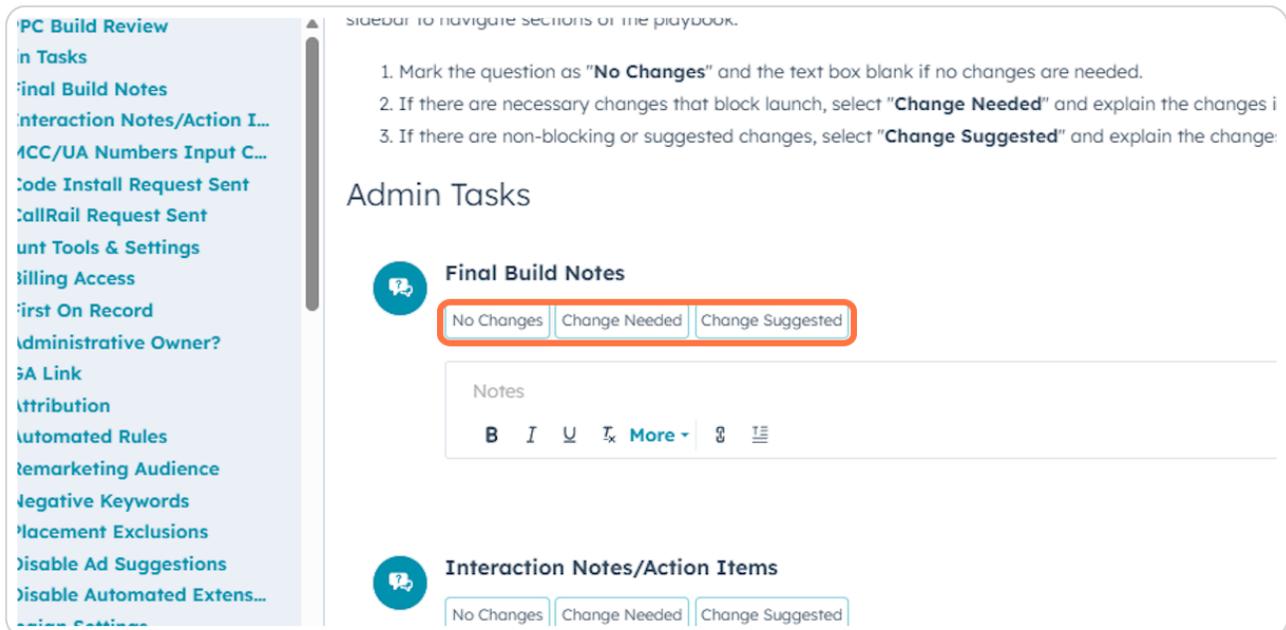
Changes are needed.

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

## STEP 27

### 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

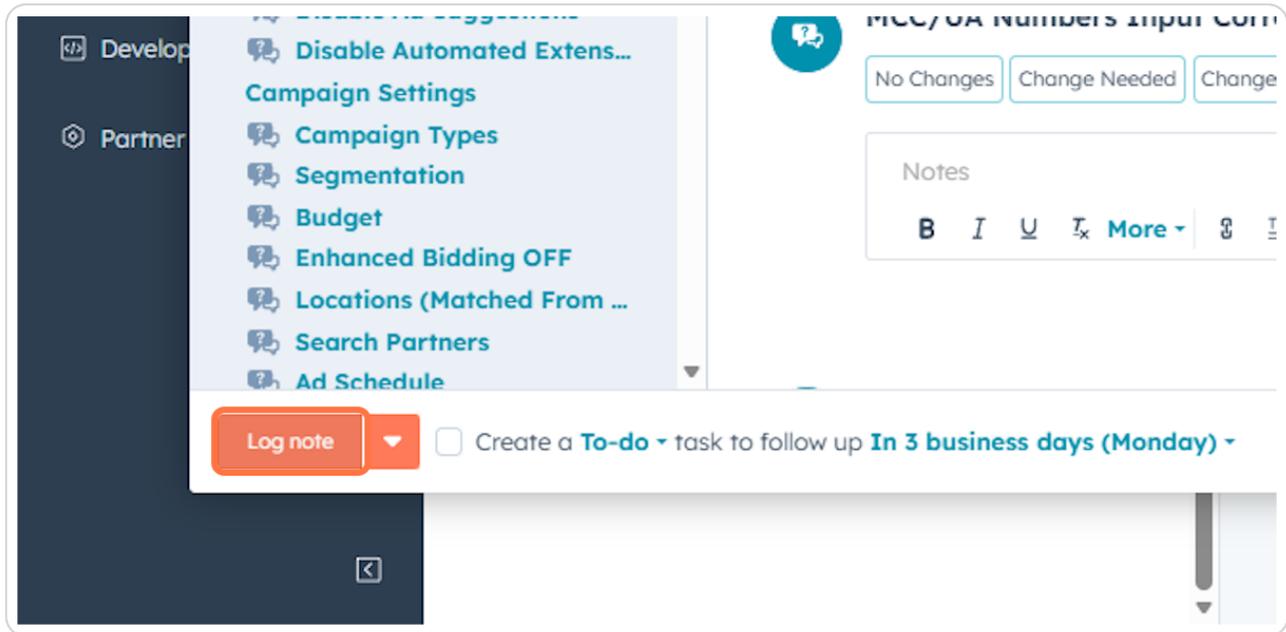
**B** *I* U ~~X~~ More

**Interaction Notes/Action Items**

No Changes | Change Needed | Change Suggested

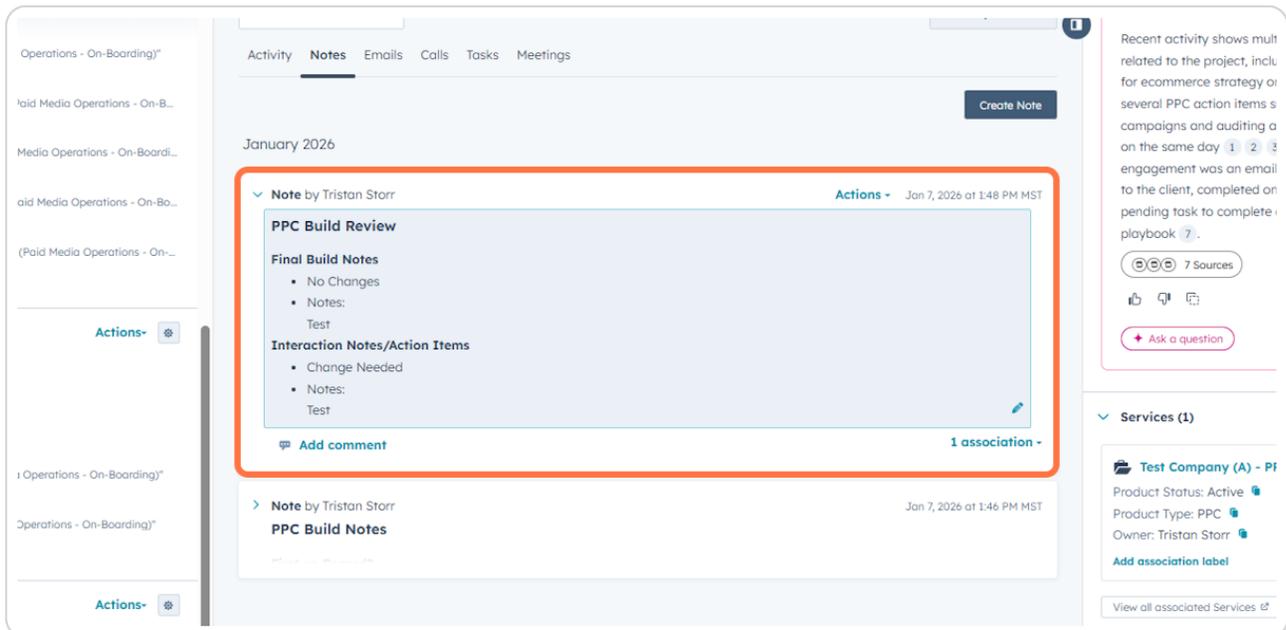
## STEP 28

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.



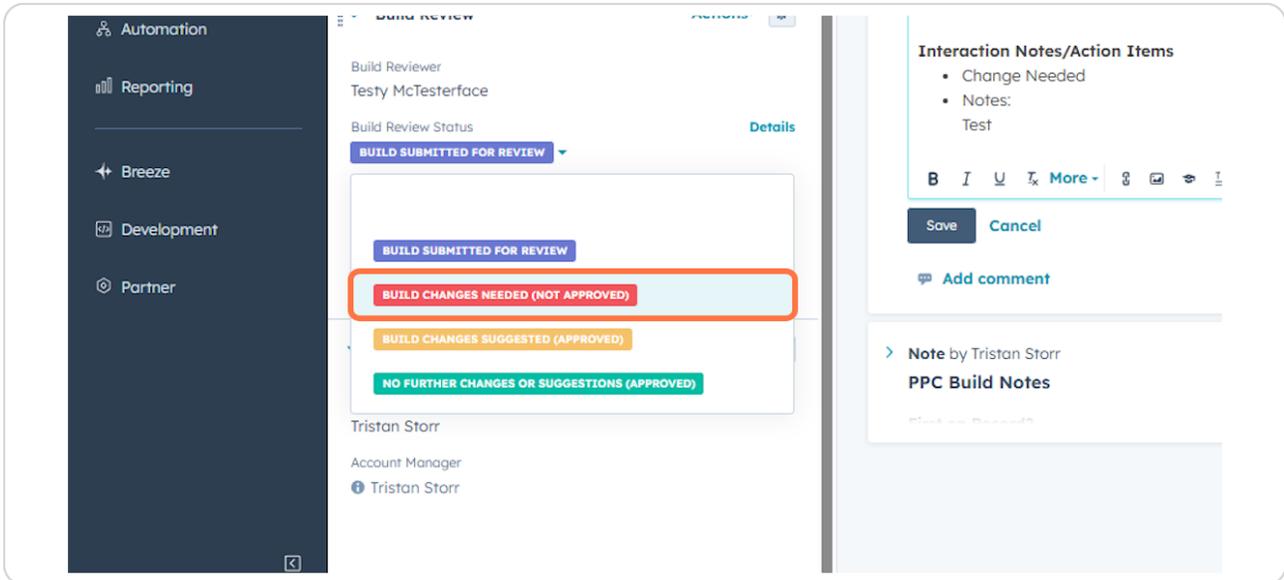
## STEP 29

Note is visible in the On-Boarding Activity Feed



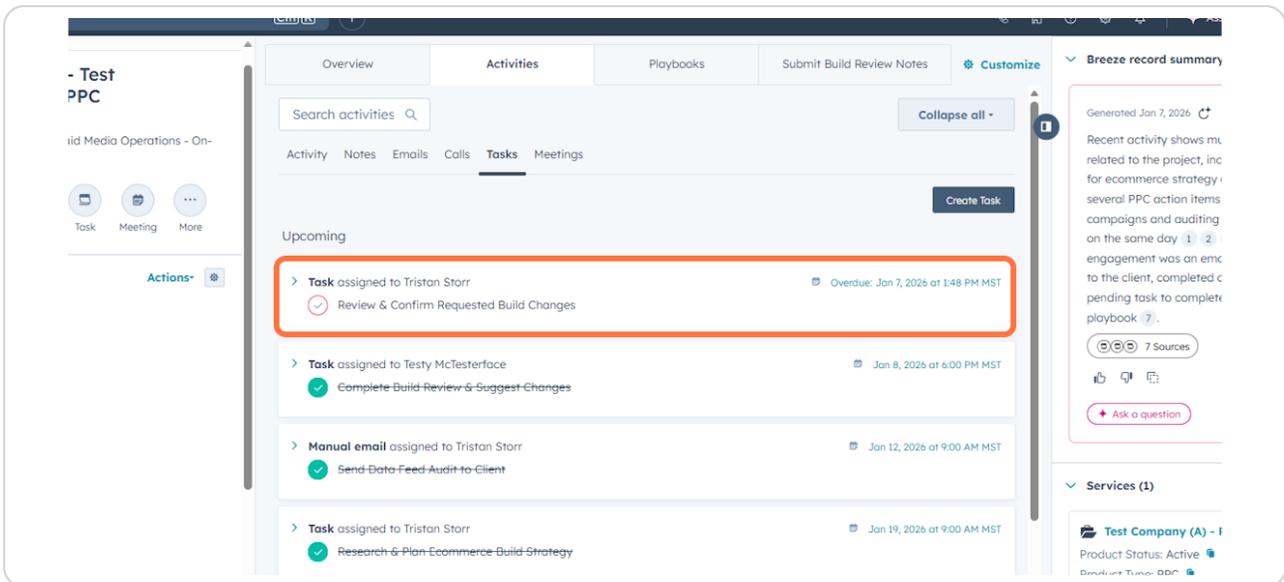
## STEP 30

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



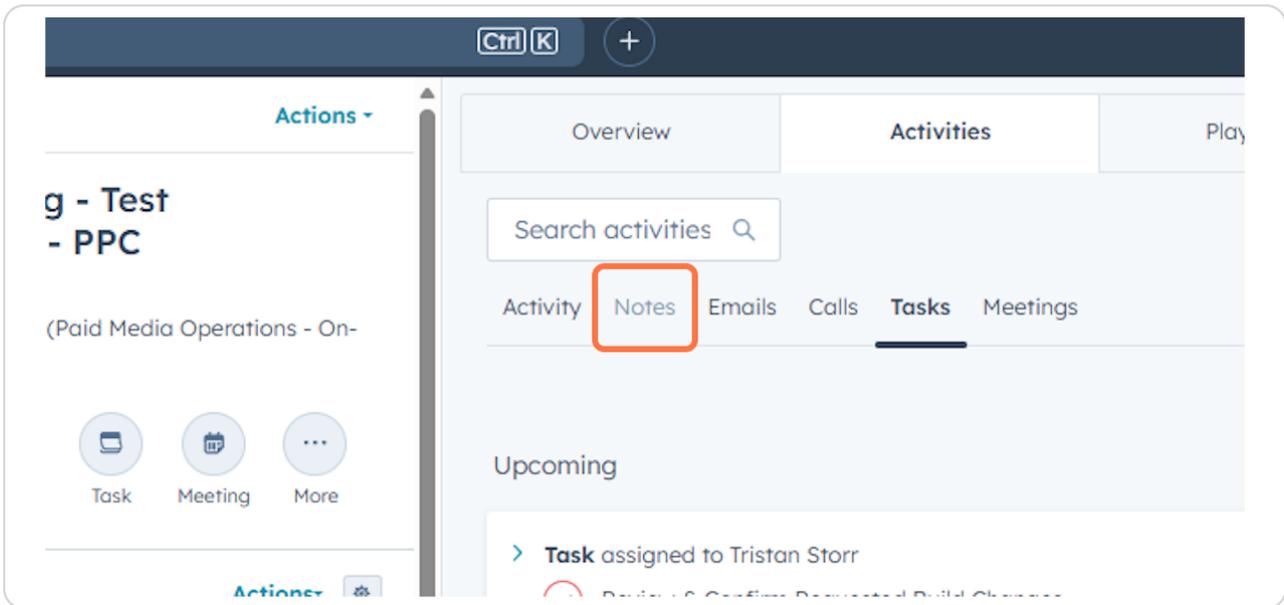
## STEP 31

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



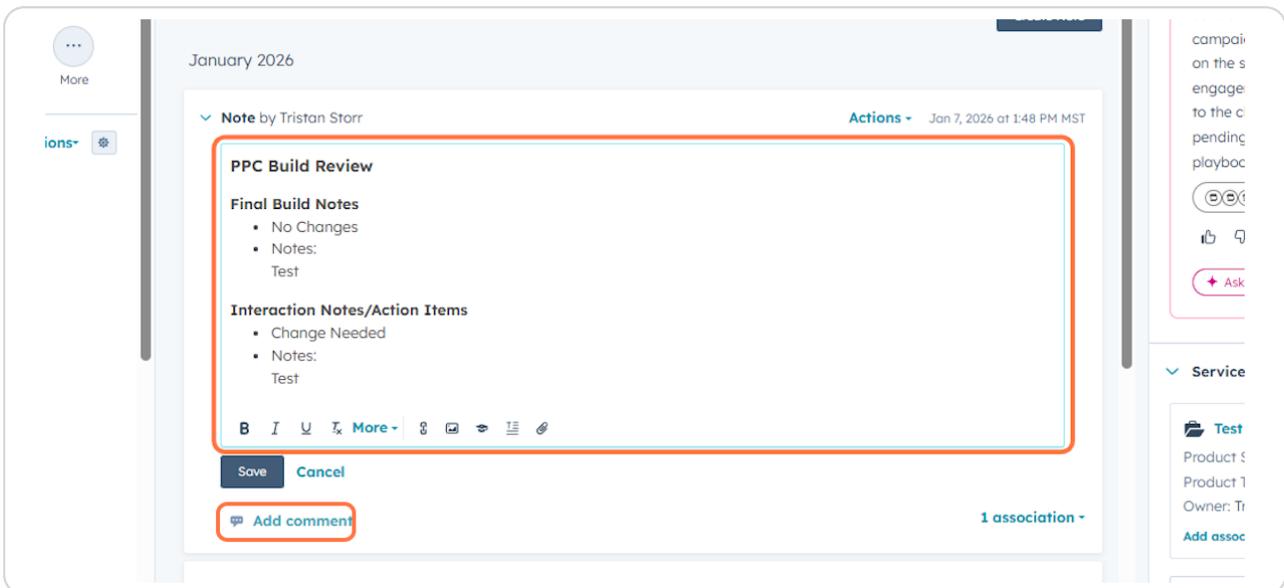
## STEP 32

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.



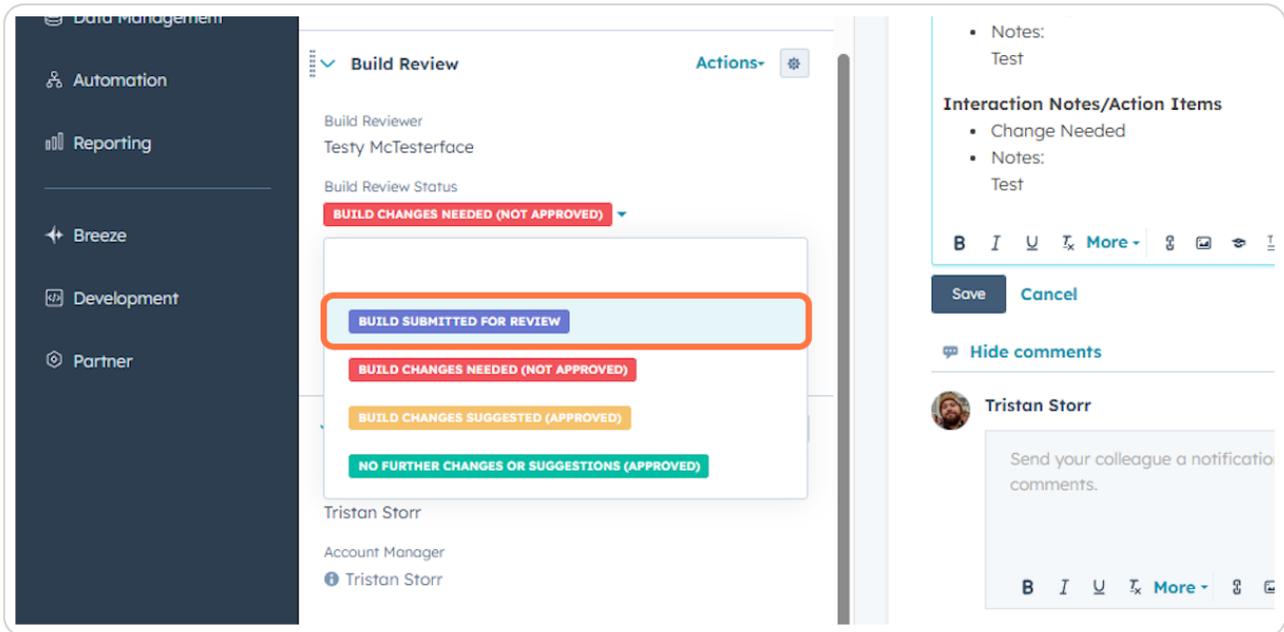
## STEP 33

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 34

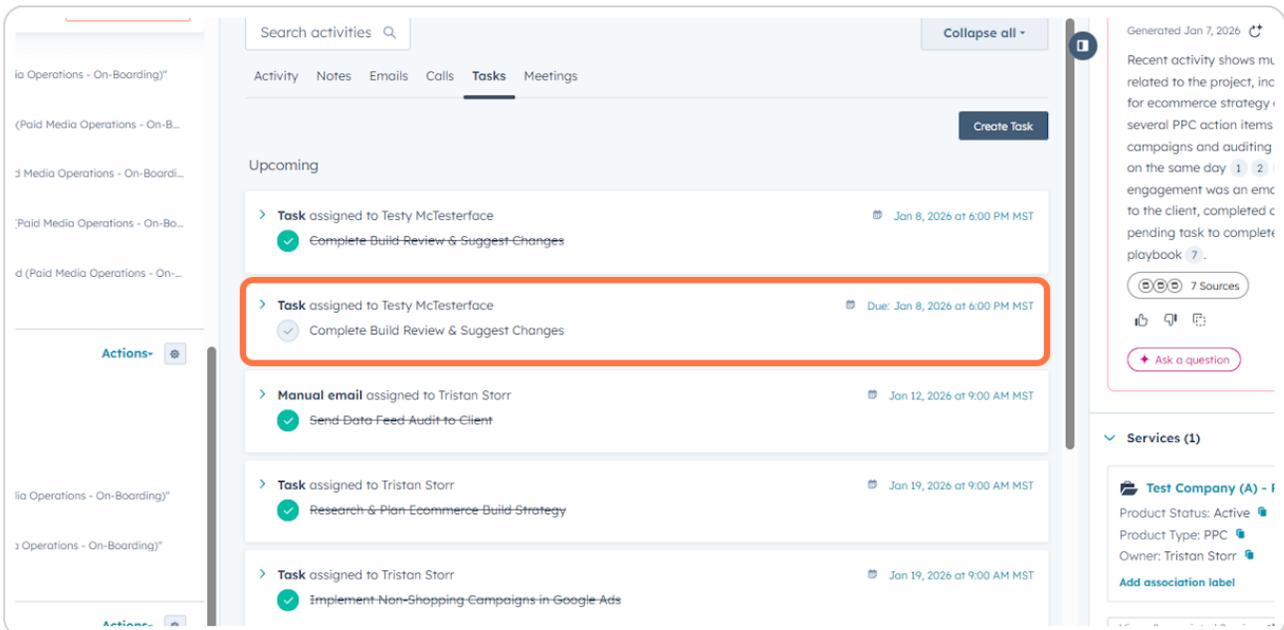
Once updates are completed, re-submit for review using the Build Review Status field.



The screenshot shows the 'Build Review' interface. On the left is a navigation menu with items: Data Management, Automation, Reporting, Breeze, Development, and Partner. The main content area is titled 'Build Review' and includes the reviewer's name 'Testy McTesturface' and the current status 'BUILD CHANGES NEEDED (NOT APPROVED)'. A dropdown menu is open, showing four options: 'BUILD SUBMITTED FOR REVIEW' (highlighted with an orange border), 'BUILD CHANGES NEEDED (NOT APPROVED)', 'BUILD CHANGES SUGGESTED (APPROVED)', and 'NO FURTHER CHANGES OR SUGGESTIONS (APPROVED)'. Below the dropdown, the reviewer's name 'Tristan Storr' and role 'Account Manager' are listed. 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 35

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



The screenshot displays a 'Tasks' list in a project management tool. The interface includes a search bar, tabs for 'Activity', 'Notes', 'Emails', 'Calls', 'Tasks', and 'Meetings', and a 'Create Task' button. The 'Upcoming' section lists several tasks, with one task assigned to 'Testy McTesturface' highlighted by an orange border. This task is 'Complete Build Review & Suggest Changes' with a due date of 'Jan 8, 2026 at 6:00 PM MST'. Other tasks include 'Send Data Feed Audit to Client' assigned to 'Tristan Storr' and 'Research & Plan E-commerce Build Strategy' assigned to 'Tristan Storr'. On the right, there is a 'Generated' section with a refresh icon and a 'Services (1)' section showing details for 'Test Company (A) - F'.

## STEP 36

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 software interface for managing build reviews. On the left is a sidebar with navigation items like 'Media Operations - On-Boarding'. The main content area is titled 'January 2026' and shows a 'Note by Tristan Storr' from 'Jan 7, 2026 at 1:48 PM MST'. The note is titled 'PPC Build Review' and contains two sections: 'Final Build Notes' (No Changes, Notes: Test) and 'Interaction Notes/Action Items' (Change Needed, Notes: Test). A text editor with 'Save' and 'Cancel' buttons is visible below the note. To the right, there are sections for '7 Sources', 'Services (1)' (including 'Test Company (A)'), and a comment input field for 'Tristan Storr'.

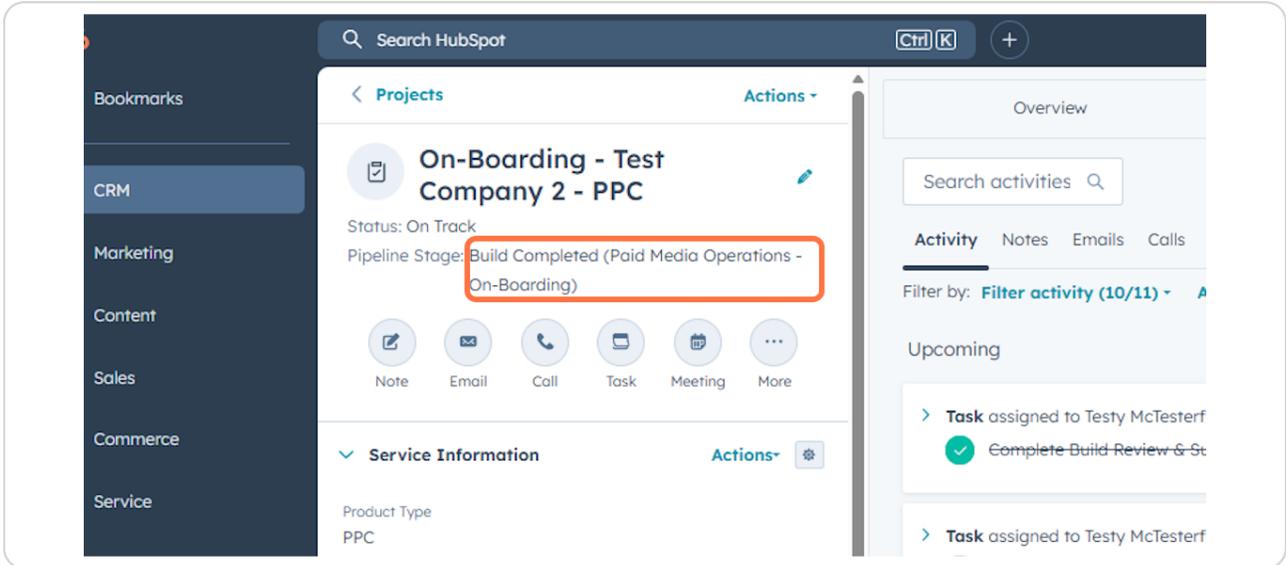
## STEP 37

Reviewer makes Approval determination.

The screenshot shows a 'Build Review' details page. The reviewer is 'Testy McTesterface'. The 'Build Review Status' is 'BUILD SUBMITTED FOR REVIEW'. A list of status options is shown: 'BUILD SUBMITTED FOR REVIEW', 'BUILD CHANGES NEEDED (NOT APPROVED)', 'BUILD CHANGES SUGGESTED (APPROVED)', and 'NO FURTHER CHANGES OR SUGGESTIONS (APPROVED)'. The last option is highlighted with a red border. Below the list, the reviewer's name 'Tristan Storr' and role 'Account Manager' are shown. On the right, there is a text editor for 'Interaction Notes/Action Items' with 'Save' and 'Cancel' buttons, and a comment input field for 'Tristan Storr'.

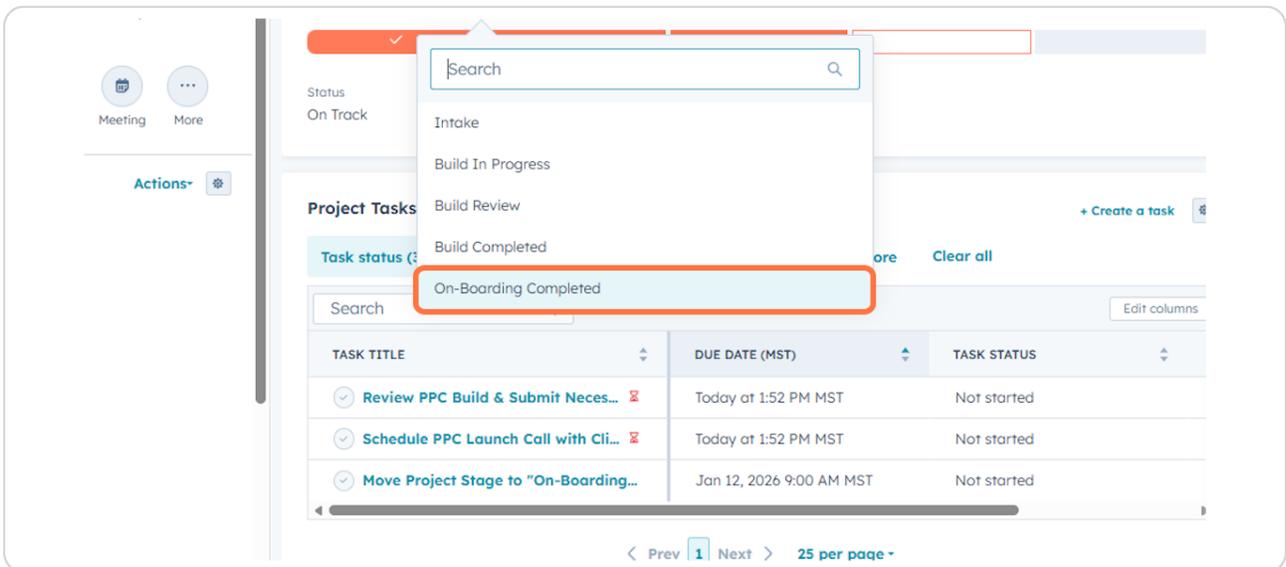
### STEP 38

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.



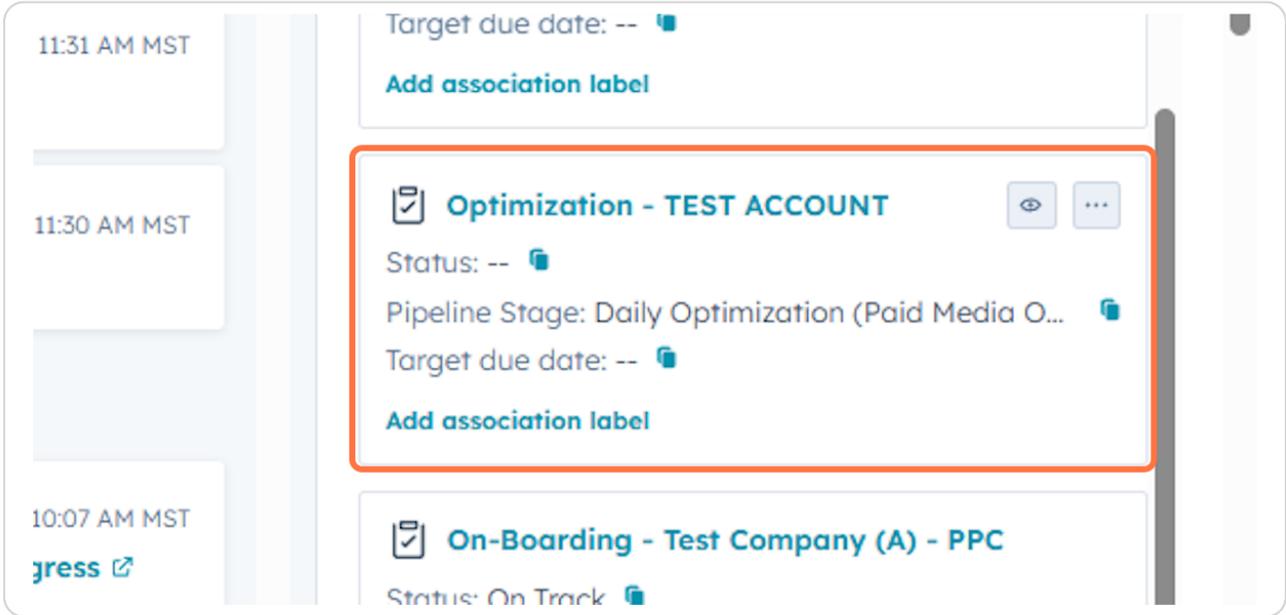
### STEP 39

Account Manager, upon launching Campaigns, will move status to "On-Boarding Completed". This will serve as a signal to the Specialist that the Service is now Active.



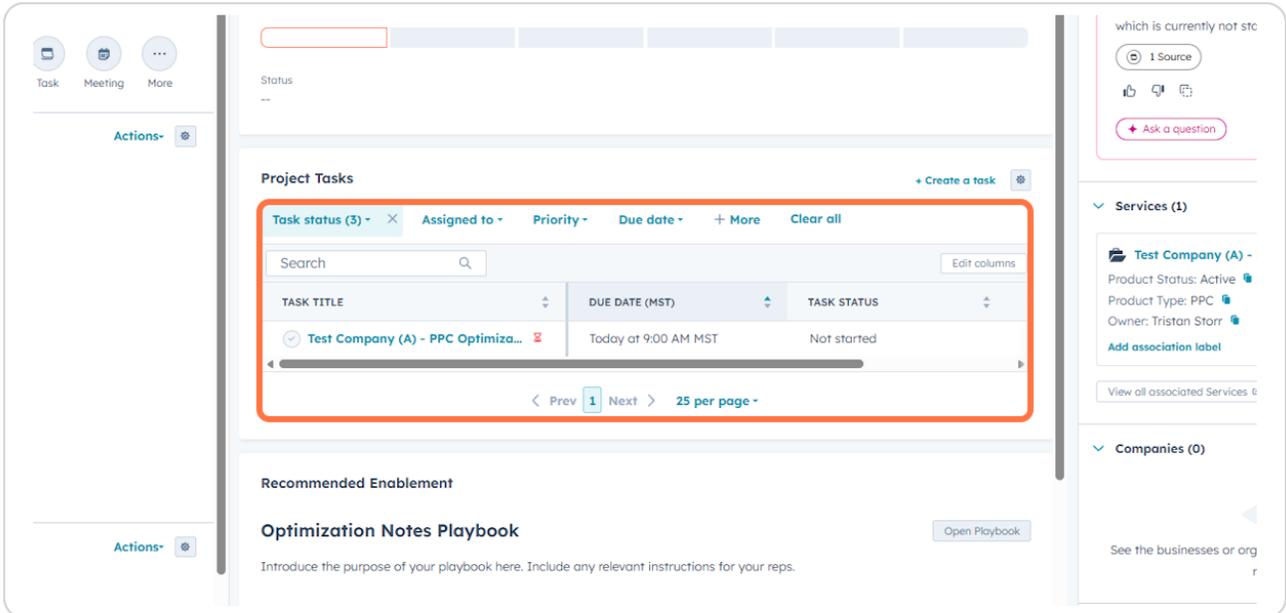
STEP 40

**The completion of an On-Boarding Project will also trigger the creation of a new Optimization Project associated with the Service.**



STEP 41

**Within the Optimization Project, the first Optimization Task will automatically be created and assigned to the Product Specialist.**



*Tango*

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