

Managing Enterprise Intake Tickets

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Created by	Creation Date	Last Updated
Logical Position	Feb 24, 2026	Feb 24, 2026

STEP 1

Sales Submits Intake Ticket

Sales fills out Intake Date, Time Block (8am, 11am, 1pm), Products Covered On Intake, and adds the email of the Contact receiving the Invite.

The screenshot displays a CRM interface with two main sections: a left-hand activity log and a right-hand ticket form.

Activity Log (Left):

- Filter by: Filter activity (7/27) ▾ All users ▾ All teams ▾
- Pinned
- Email - Test** from Tristan Storr to storr.tristan@gmail.com (Aug 5)
 - Sent
 - Test
- Tristan Storr**, Senior Business Analyst
- February 2026
- Note** (Feb 17): Call Summary - Alternative Dashboard for Refresh Rate Issues (Feb 16, 2026)
- Call - Connected** from Joel Dibrell (Feb 12, [Outbound]): Comment: Couldn't hear me
- Call** from Joel Dibrell (Feb 12, [Outbound])
- Meeting - Test** hosted by Tristan Storr (Feb 3)

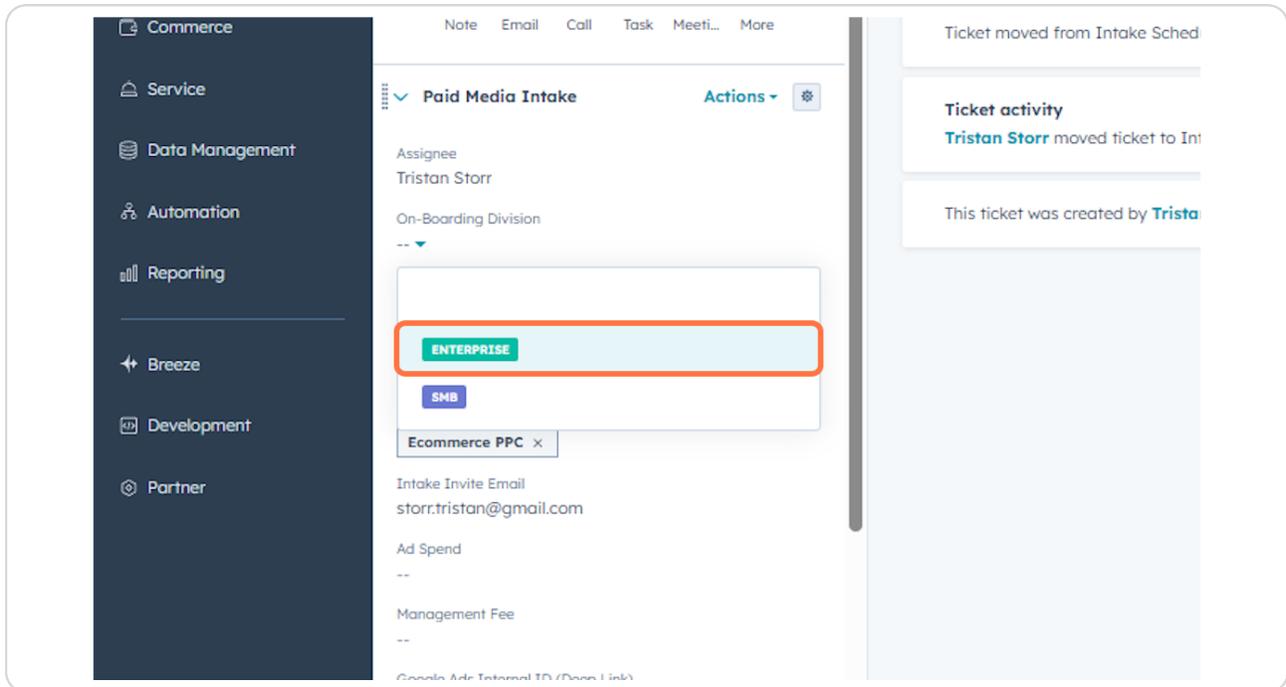
Ticket Form (Right):

- Ticket name ***: Test Enterprise Ticket Workflow
- Pipeline ***: Paid Media Intake Ticket
- Dependent properties ⓘ** (highlighted with a red box):
 - Intake Date ***: 03/04/2026
 - Intake Time Block ***: 8:00 AM PST
 - Paid Media Intake Products ***: Ecommerce PPC ×
 - Intake Invite Email ***: storr.tristan@gmail.com
- Ticket status ***: Intake Scheduled
- Priority**: (dropdown menu)

STEP 2

Ticket Is Assigned ENT Division PRIOR to Team Assignment

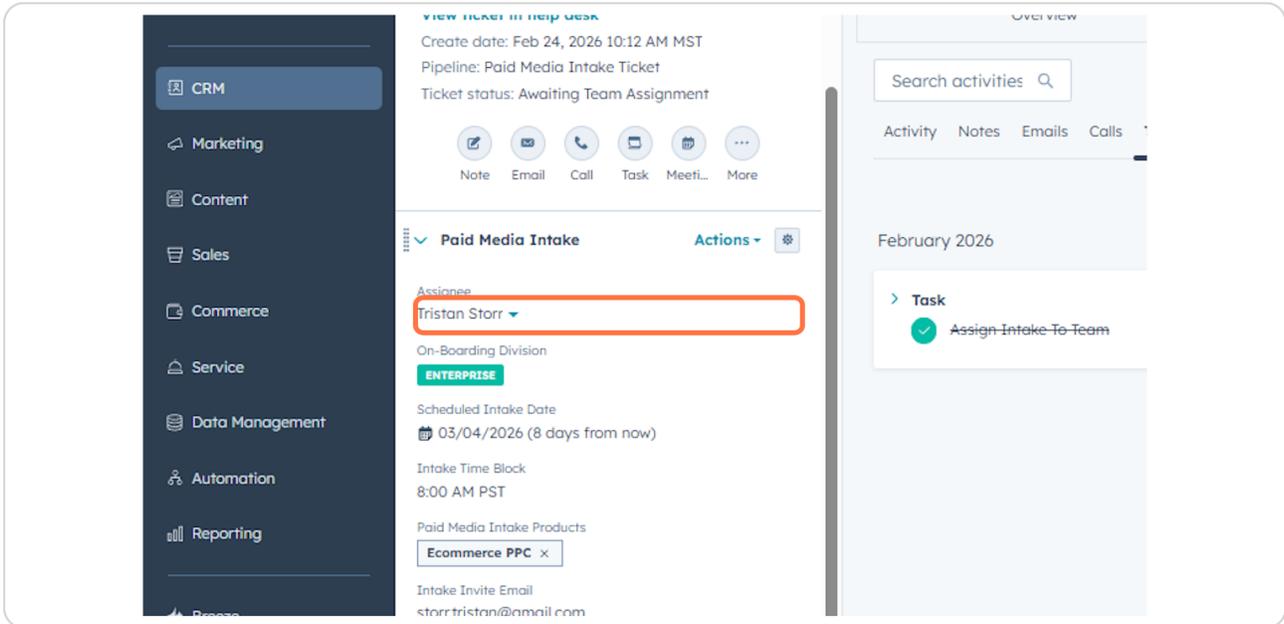
As the Ticket goes through the Assignment process, the division is assigned to either Enterprise or SMB.



STEP 3

Team Lead Is Assigned To Ticket. Ticket Is Then Assigned From Team Lead to AM.

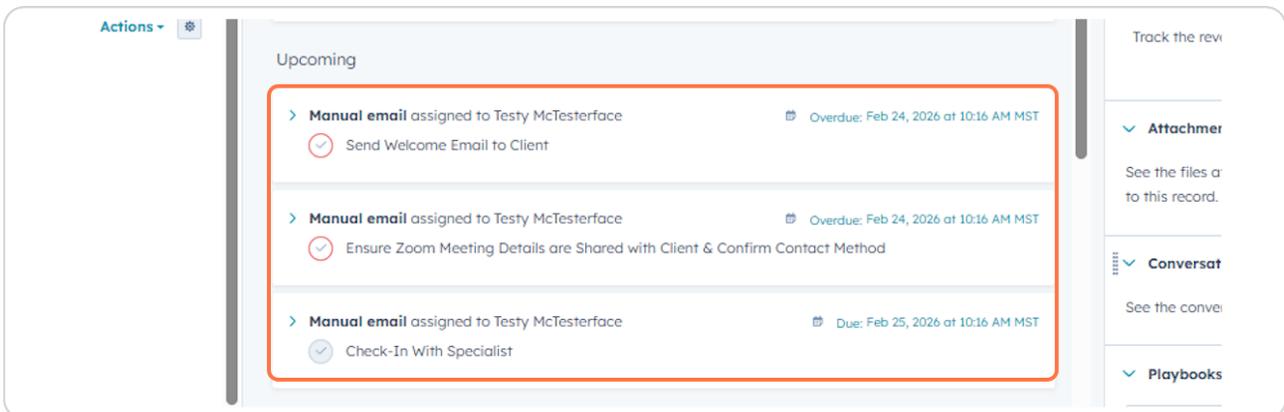
Client Services Leadership assigns Intake to Team Lead in the Assignee field. Team Lead will receive a task for "Assign Intake to AM". Team Lead updates Assignee field and marks task as complete. This action will kick off several actions for the new AM assignee responsible for the Intake.



STEP 4

AM Assigned Stage Task Generated

Three new tasks are generated for the AM: Send Welcome Email, Ensure Zoom Meeting is Shared With Client, Check-In With Specialist.



STEP 5

Resource Note Auto-Generates

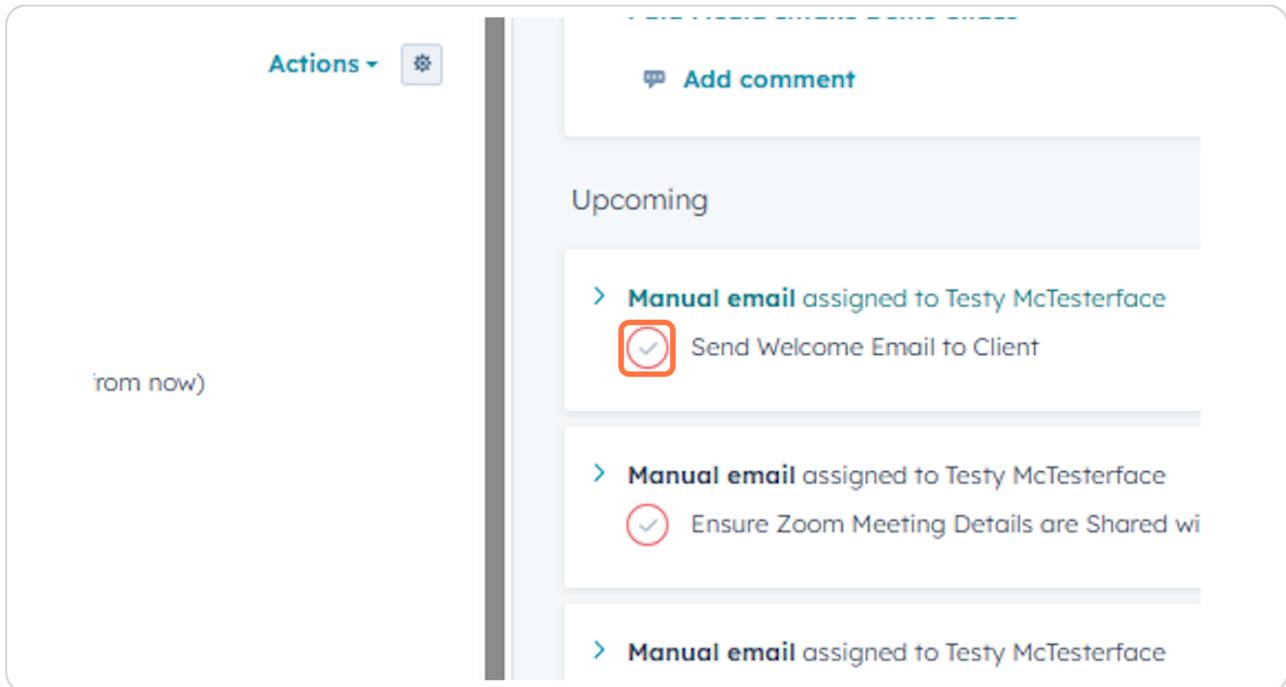
In addition to the tasks, a note will automatically be added to the Ticket record and pinned. This note contains links to resources to help educate users on how to facilitate the On-Boarding Process in HubSpot.

The screenshot displays the HubSpot interface for a ticket record. The main content area is titled 'Activities' and shows a 'Pinned' note. The note is titled 'Note' and is dated 'Feb 24, 2026 at 10:15 AM MST'. The note's content is: 'This note is for sharing links to resources related to managing the Intake & Build process for Account Managers:'. Below this text are four hyperlinks: 'Legacy PMOS Resources', 'Paid Media Intakes Workflow Guide', 'Managing Intakes - What's Next?', and 'Paid Media Intake Demo Slides'. At the bottom of the note, there is an 'Add comment' button and a '1 association' dropdown. The note is highlighted with a red border. Below the pinned note, the 'Upcoming' section shows two tasks: 'Manual email assigned to Testy McTesterface' with a sub-task 'Send Welcome Email to Client' and another 'Manual email assigned to Testy McTesterface' with a sub-task 'Ensure Zoom Meeting Details are Shared with Client & Confirm Contact Method'. The right sidebar contains sections for 'Services (0)', 'Deals (0)', 'Attachments', 'Conversations (0)', and 'Playbooks'. The left sidebar shows the ticket details for 'g - TEST Ecommerce'.

STEP 6

AM Sends Welcome Email & Completes "Welcome Email" Task

After sending the Welcome Email to the Client, the Account Manager will mark "Send Welcome Email To Client" as Completed. This action triggers the Ticket to move from "AM Assigned" to "Pre-Intake Preparation".



The screenshot shows a software interface with a task list. On the left, there is a vertical sidebar with the text "from now)" and a header "Actions" with a gear icon. The main area on the right is titled "Upcoming" and contains a list of tasks. Each task is preceded by a blue chevron icon and the text "Manual email assigned to Testy McTesterface". The first task, "Send Welcome Email to Client", has a red square icon with a white checkmark, indicating it is completed. The second task, "Ensure Zoom Meeting Details are Shared wi", has a red circle icon with a white checkmark, also indicating completion. The third task is partially visible and has a blue chevron icon.

STEP 7

Pre-Intake Preparation Tasks Generated

Several new activities are generated for the AM to prepare for the Intake Call. These tasks have a 3 business day window to be completed but do not necessarily line-up with the scheduled intake date.

The screenshot displays a list of tasks assigned to Testy McTesturface. Each task entry includes a checkmark icon, the task name, and a due date of Mar 3, 2026 at 5:00 PM MST. The tasks are:

- Task assigned to Testy McTesturface: Review Sales Activity Feed
- Task assigned to Testy McTesturface: Pre-Fill Intake Playbook using HubSpot Assistance
- Task assigned to Testy McTesturface: Update Quickbase Account Numbers
- Task assigned to Testy McTesturface: Review Client Website & Audit Attribution Points
- Task assigned to Testy McTesturface: Review Returned Client Questionnaire, If Possible
- Task assigned to Testy McTesturface: Review Google Ads Platform Performance, If Possible

STEP 8

AM Starts "Review Client Questionnaire" Task

As part of the templated Welcome Emails available in HubSpot, we have a Questionnaire clients can fill out to provide information before the actual Intake Call. Their responses can be reviewed inside HubSpot by following the next steps.

The screenshot shows a task list for Testy McTesturface. One task is highlighted with a red border:

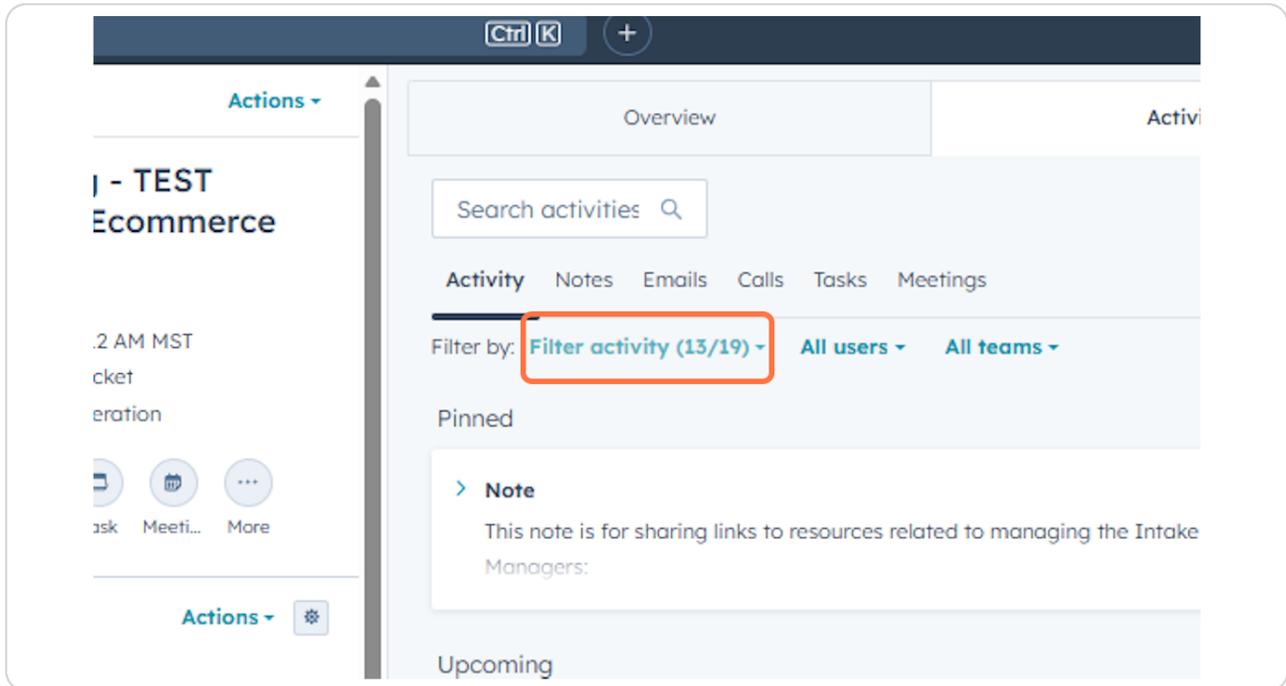
- Task assigned to Testy McTesturface: Review Returned Client Questionnaire, If Possible

The due date for this task is Mar 3, 2026 at 5:00 PM MST.

STEP 9

Option 1: AM Finds Form Response on Activity Feed

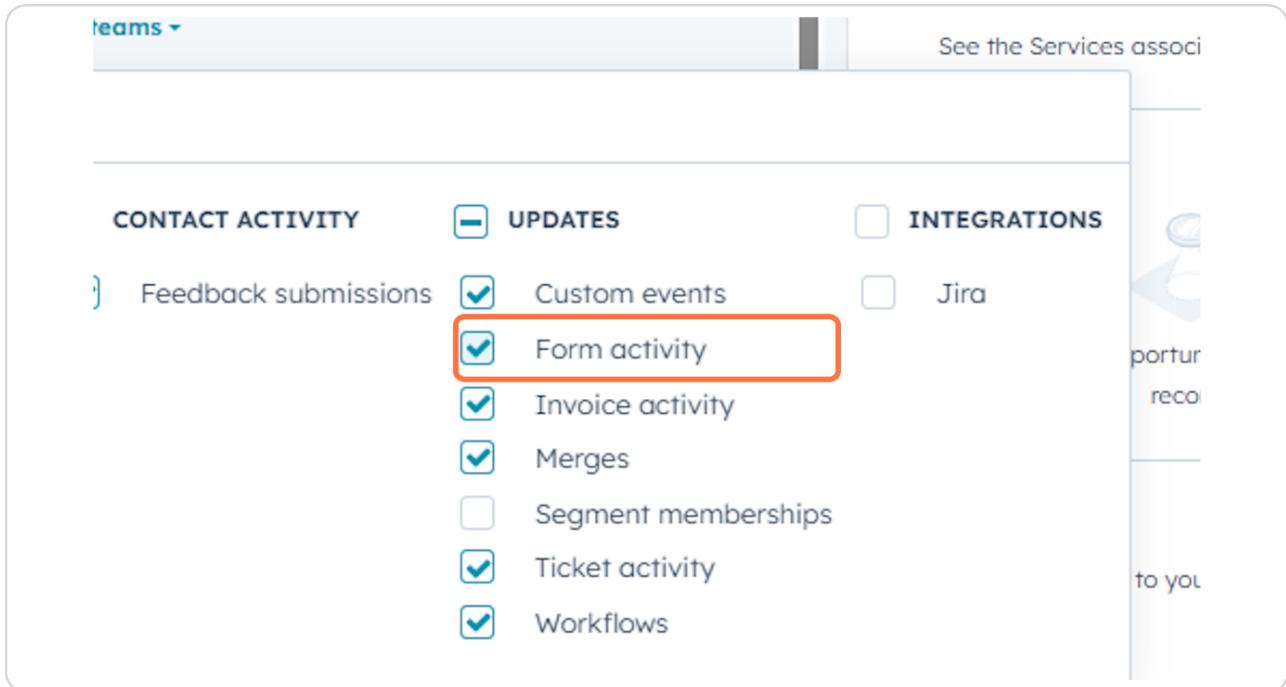
AM goes to the "Activity" tab and selects "Filter Activity"



STEP 10

AM Selects "Form Activity"

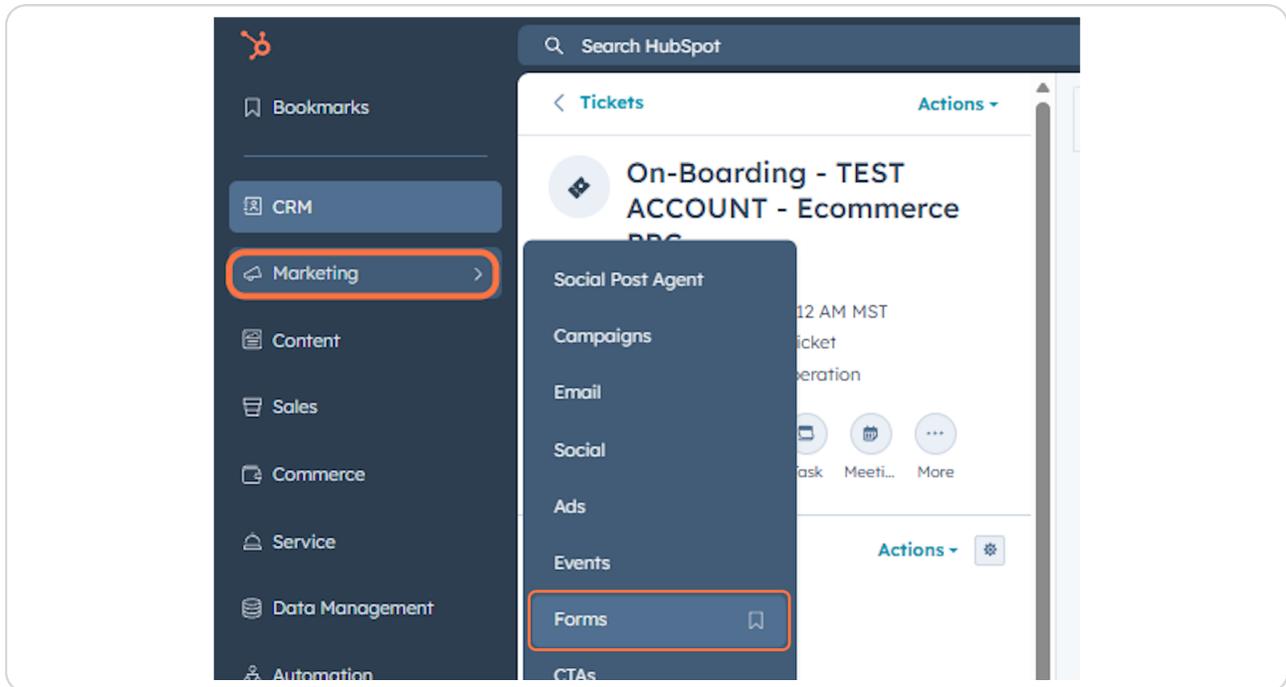
AM Selects "Form Activity". If the client has filled out the form, a new activity will appear in the feed that links to their response.



STEP 11

Option 2: AM Navigates To Forms Directly

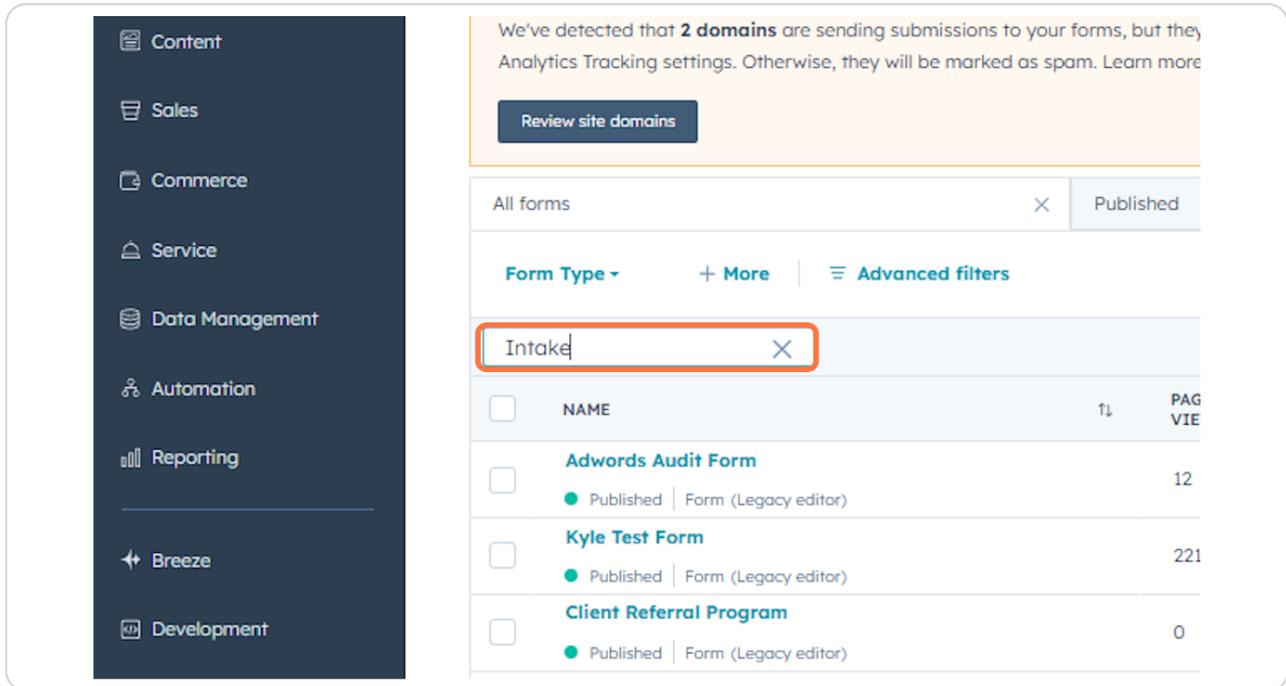
To get to the Forms section directly, the AM should select "Marketing" from the left-hand navigation sidebar and then select "Forms" from the dropdown.



STEP 12

AM Filters For Intake Forms

To filter for Intake Questionnaire specific forms, type in "Intake" in the Search bar.



The screenshot displays a dashboard with a dark sidebar on the left containing navigation items: Content, Sales, Commerce, Service, Data Management, Automation, Reporting, Breeze, and Development. The main content area features a notification at the top about domain submissions, followed by a search bar with 'Intake' entered and highlighted by a red box. Below the search bar is a table of forms with columns for selection, name, and page views.

<input type="checkbox"/>	NAME	↓	PAGE VIEWS
<input type="checkbox"/>	Adwords Audit Form ● Published Form (Legacy editor)		12
<input type="checkbox"/>	Kyle Test Form ● Published Form (Legacy editor)		221
<input type="checkbox"/>	Client Referral Program ● Published Form (Legacy editor)		0

STEP 13

AM Selects Intake Questionnaire Based On Product Mix

Select the Intake Questionnaire that is appropriate based on the Product Mix the client is signed on for. Within the form, you can access the client's submission directly.

The screenshot shows the HubSpot Forms interface. At the top, there's a search bar and navigation options. Below that, a notification banner reads: "Unknown Domains Sending Submissions to Your Forms". The main content area displays a list of forms under the filter "Intake". The table below lists several forms with their respective statistics.

NAME	PAGE VIEWS	SUBMISSION S / PAGE VIEW	SPAM SUBMISSIONS	FORM SUBMISSIONS	APPEARS ON	LAST UPDATED	CREATED BY
<input type="checkbox"/> Paid Social Intake Questionnaire NEW Published Form (Legacy editor)	268	33.58%	0	90	No HubSpot plac...	January 10, 2025 8:55 AM	Cory
<input type="checkbox"/> Email Intake Questionnaire Published Form (Legacy editor)	89	37.08%	0	33	No HubSpot plac...	November 9, 2024 8:29 AM	Pauli
<input type="checkbox"/> Paid Search Intake Questionnaire Published Form (Legacy editor)	4598	41.8%	0	2K	No HubSpot plac...	October 11, 2024 2:56 PM	Lindi
<input type="checkbox"/> Paid Search Intake Questionnaire (Microsoft) Published Form (Legacy editor)	11	18.18%	0	2	No HubSpot plac...	October 11, 2024 2:54 PM	Pauli
<input type="checkbox"/> Paid Social Intake Questionnaire Published Form (Legacy editor)	430	29.3%	0	126	No HubSpot plac...	October 11, 2024 2:54 PM	Lindi
<input type="checkbox"/> Paid Search & Paid Social Intake Questionnaire Published Form (Legacy editor)	423	32.15%	0	136	No HubSpot plac...	October 11, 2024 2:52 PM	Lindi

STEP 14

AM Pre-Fills Intake Playbook

For the "Pre-Fill Intake Playbook" task, review the Sales activity on the Company record and begin filling in the Intake Playbook (See Next Step)

The screenshot shows a task notification in HubSpot. The notification text is: "Task assigned to Testy McTesturface" with a due date of "Due: Mar 3, 2026 at 5:00 PM MST". Below this, there is a checkmark icon and the text "Pre-Fill Intake Playbook using HubSpot Assistance".

STEP 15

AM Opens Playbook Record On Ticket

In the Playbooks card on the right-column, select the relevant playbook to the product mix for the intake. You can search for specific playbooks using the Search bar if the relevant one is not shown in the preview.

The screenshot shows a user interface for selecting playbooks. On the left, there is a vertical sidebar with some text partially visible: 'ne', 'r', 'many', 'n the', 's it'. The main area contains a search bar at the top with the text 'Search' and a magnifying glass icon. Below the search bar are three playbook cards:

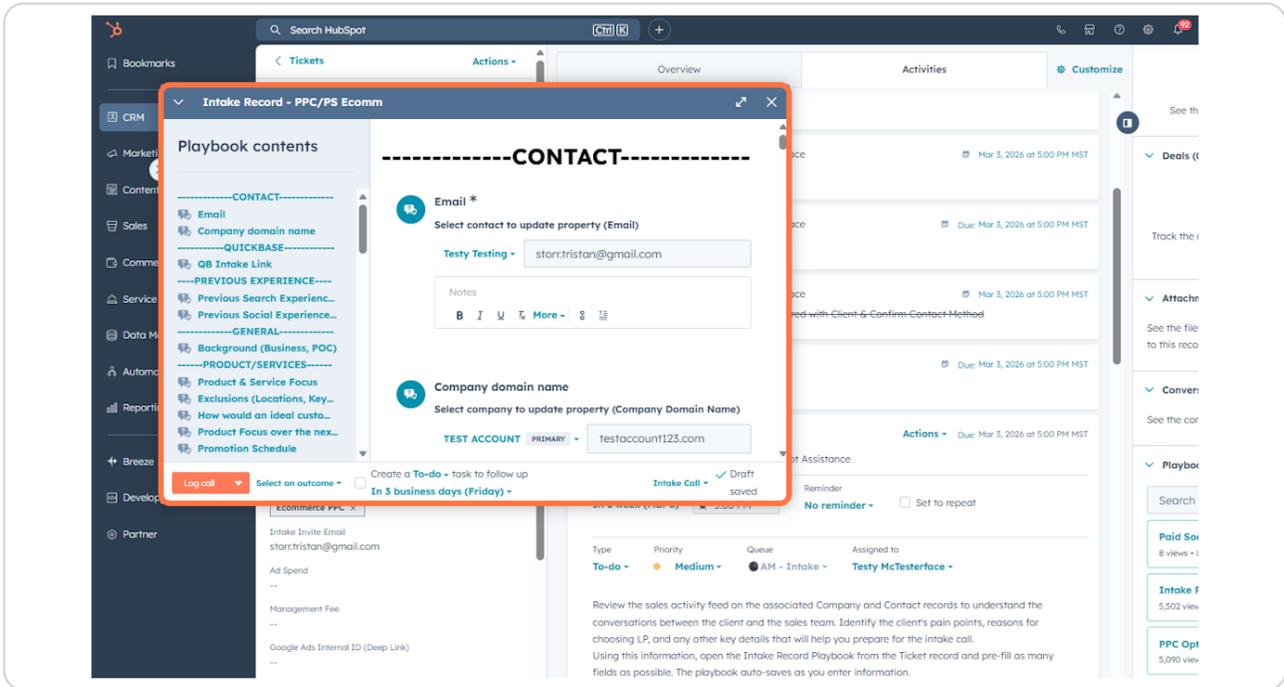
- Paid Social Campaign Build** (RECENTLY USED)
8 views • Last viewed 20 hours ago
- Intake Record - PPC/PS Ec** (FREQUENTLY USED) - This card is highlighted with an orange border.
5,502 views • Last viewed 19 hours ago
- PPC Optimization Notes** (FREQUENTLY USED)
5,090 views • Last viewed a minute ago

At the bottom of the main area, there is a link that says [View all playbooks](#).

STEP 16

AM Fills Out Playbook

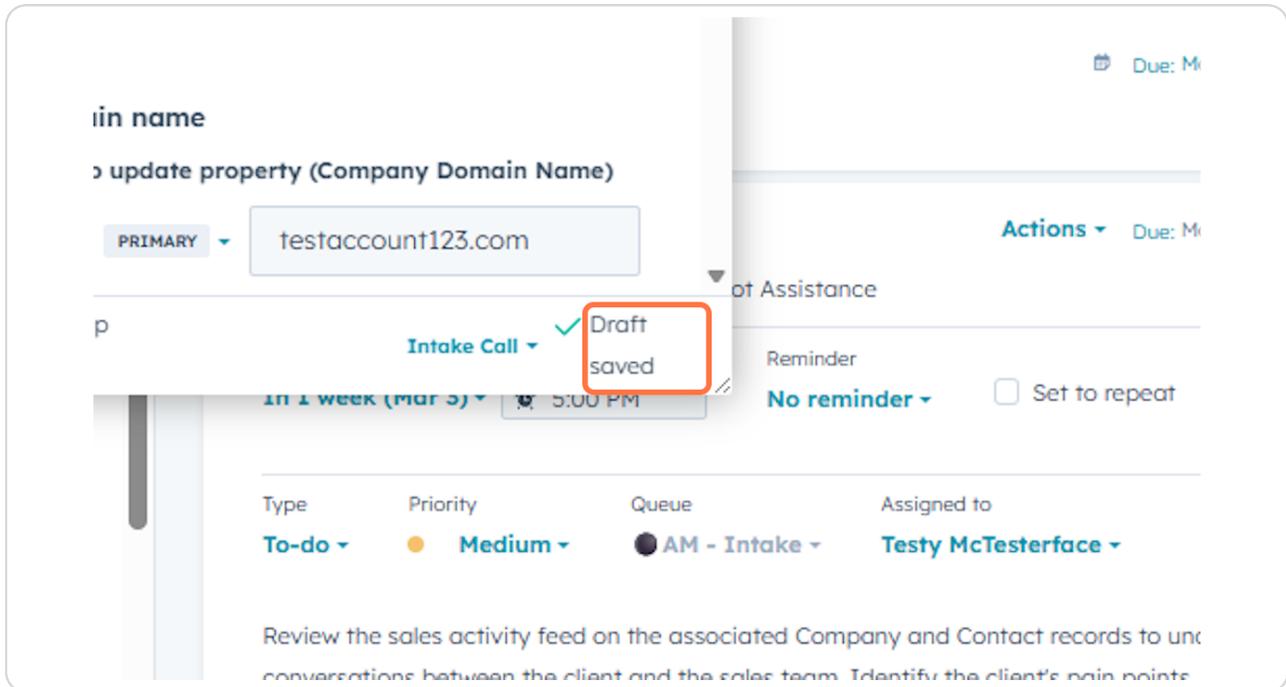
Playbook will open in a pop up window. AM fills out playbook to the best of their ability. Any responses received from the client via the questionnaire should also populate in the Intake playbook.



STEP 17

Playbook Auto-Saves As It Is Updated

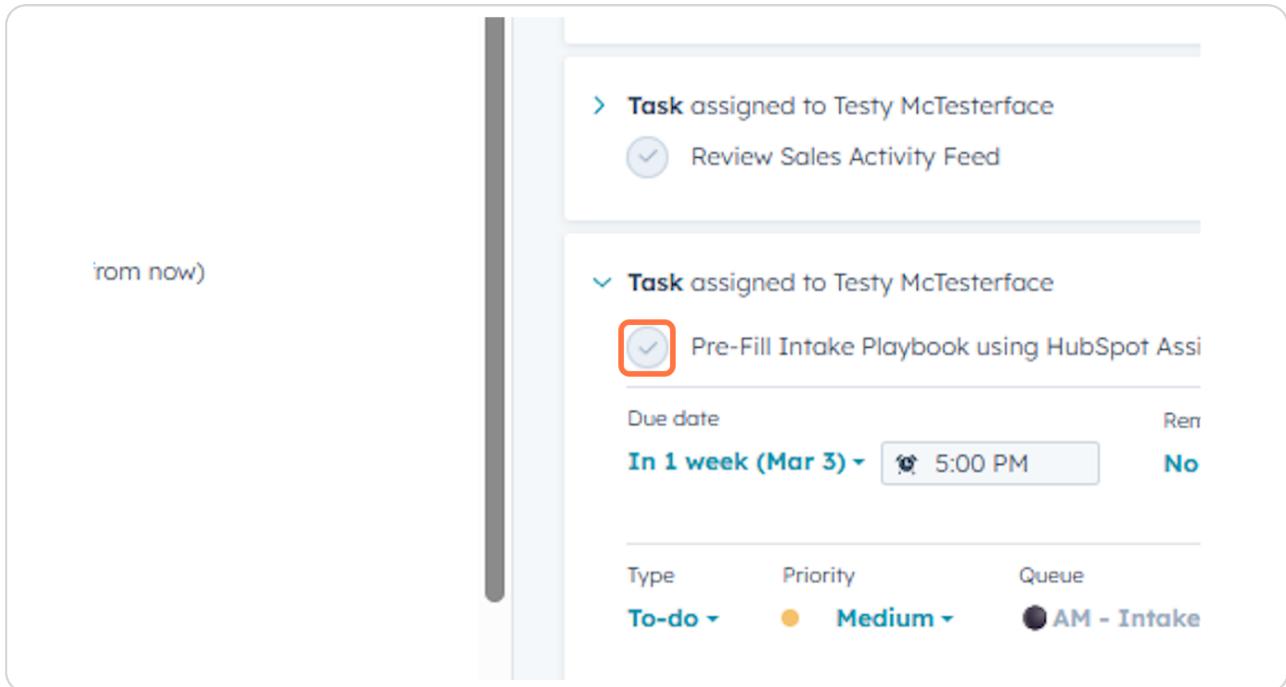
Playbooks automatically save as you fill them out so they can be opened and closed without losing any data.



STEP 18

AM Completes "Pre-Fill" Task Once Playbook Is Updated

After pre-filling the Intake and prepping for the Intake, mark the "Pre-Fill Intake Playbook" task as complete on the Ticket record.



from now)

> Task assigned to Testy McTesterface

- Review Sales Activity Feed

Task assigned to Testy McTesterface

- Pre-Fill Intake Playbook using HubSpot Assi

Due date Ren

In 1 week (Mar 3) **No**

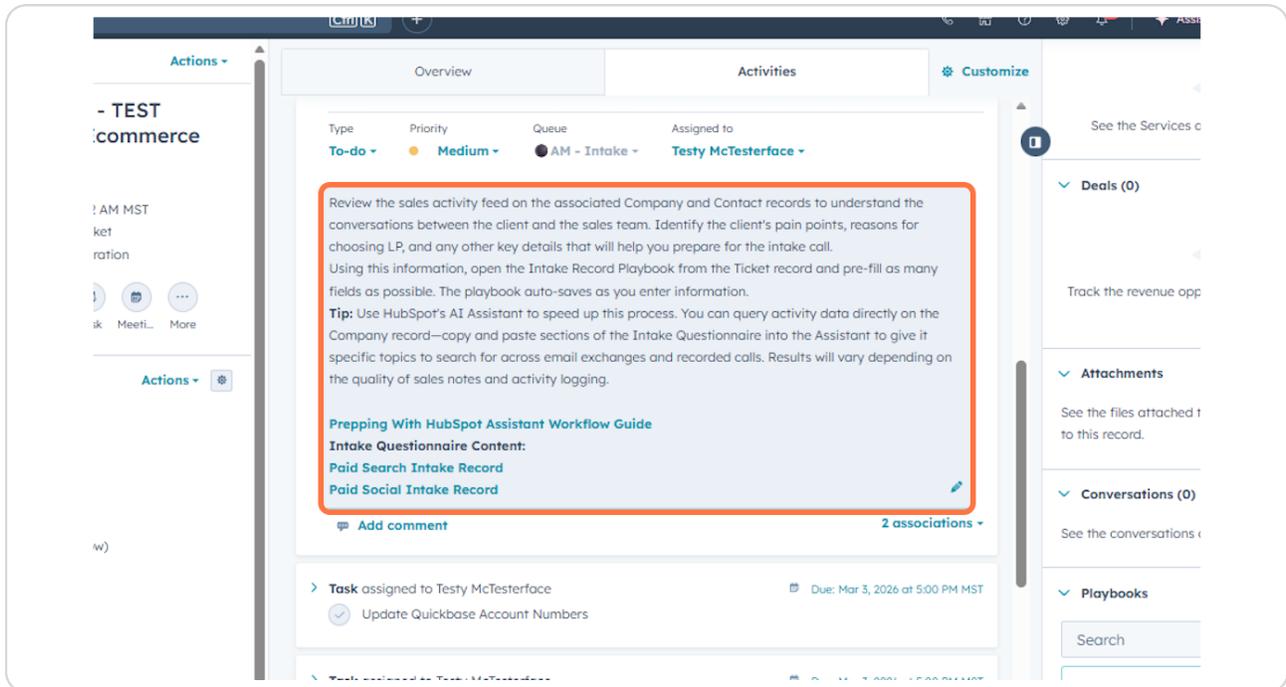
Type Priority Queue

To-do ● Medium ● AM - Intake

STEP 19

Task Descriptions Populate With Instructions

Each Task in the Ticket workflow should have instructions on how to complete it. More complex tasks will have external links to additional resources.



The screenshot displays a HubSpot ticket interface. The main content area shows a task description for a ticket assigned to Testy McTesterface. The task is a 'To-do' type with a 'Medium' priority, in the 'AM - Intake' queue. The description is enclosed in a red box and contains the following text:

Review the sales activity feed on the associated Company and Contact records to understand the conversations between the client and the sales team. Identify the client's pain points, reasons for choosing LP, and any other key details that will help you prepare for the intake call. Using this information, open the Intake Record Playbook from the Ticket record and pre-fill as many fields as possible. The playbook auto-saves as you enter information.

Tip: Use HubSpot's AI Assistant to speed up this process. You can query activity data directly on the Company record—copy and paste sections of the Intake Questionnaire into the Assistant to give it specific topics to search for across email exchanges and recorded calls. Results will vary depending on the quality of sales notes and activity logging.

Below the tip, there are three links:

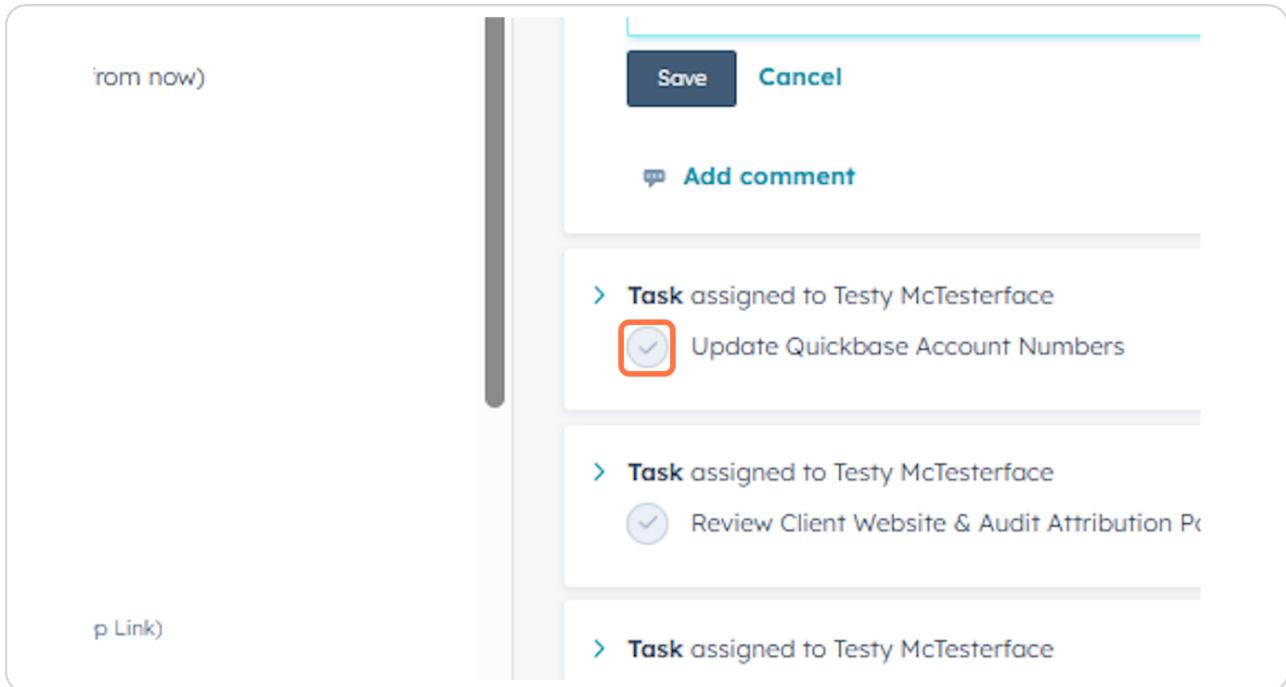
- [Prepping With HubSpot Assistant Workflow Guide](#)
- [Intake Questionnaire Content:](#)
- [Paid Search Intake Record](#)
- [Paid Social Intake Record](#)

At the bottom of the description box, there is an 'Add comment' button and a '2 associations' link. Below the description, a task list shows 'Task assigned to Testy McTesterface' with a due date of 'Mar 3, 2026 at 5:00 PM MST' and a sub-task 'Update Quickbase Account Numbers' which is marked as complete.

STEP 20

AM Completes All Pre-Intake Tasks

As Pre-Intake Preparation Tasks are completed, AM marks each task as complete on the Ticket record.



STEP 21

Ticket Stage Moves to "Intake Call" When Intake Date Is Within 1 Day

Once the Intake Date on the Ticket is 1 day from now, the status of the Ticket will automatically jump to Intake Call. This will generate a few new tasks for the AM.

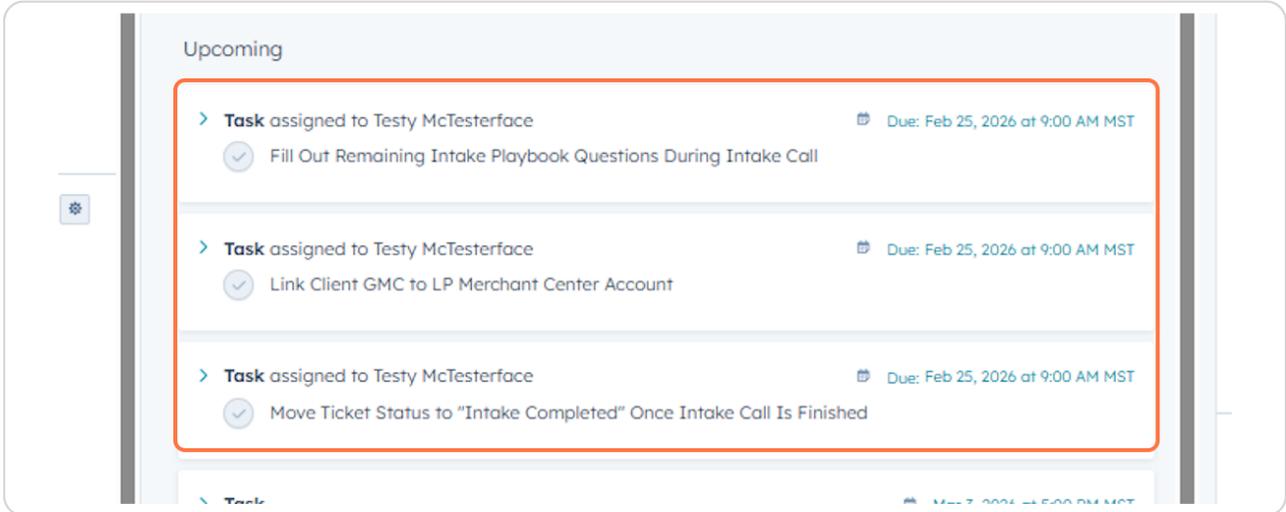
The screenshot displays a CRM interface for a ticket titled "Paid Media Intake". The ticket is assigned to "Testy McTesteface" and is in the "ENTERPRISE" division. The "Scheduled Intake Date" is "02/25/2026 (1 day from now)", which is highlighted with a red rectangular box. Below the date is a calendar view for February 2026, showing the 25th as the selected date. The right-hand side of the interface shows an "Overview" panel with several activity logs, including "Workflow activity" and "Ticket activity" entries.

Su	Mo	Tu	We	Th	Fr	Sa
	2	3	4	5	6	
	9	10	11	12	13	
	16	17	18	19	20	
	23	24	25	26	27	
	2	3	4	5	6	

STEP 22

Intake Tasks Are Generated

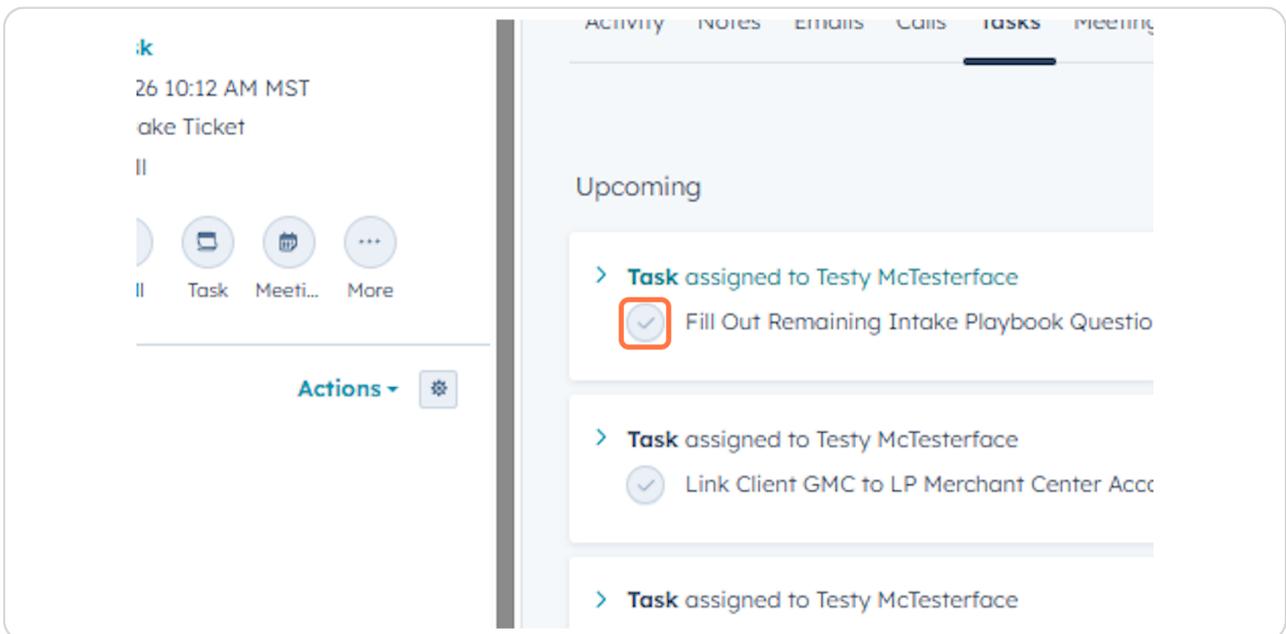
A set of three new tasks will be generated for the Account Manager to complete either on or directly after the Intake. This includes completing the playbook, linking the GMC (if Ecommerce), linking Meta Business (if Social), and Moving The Ticket Status after Intake.



STEP 23

AM Completes Intake Tasks

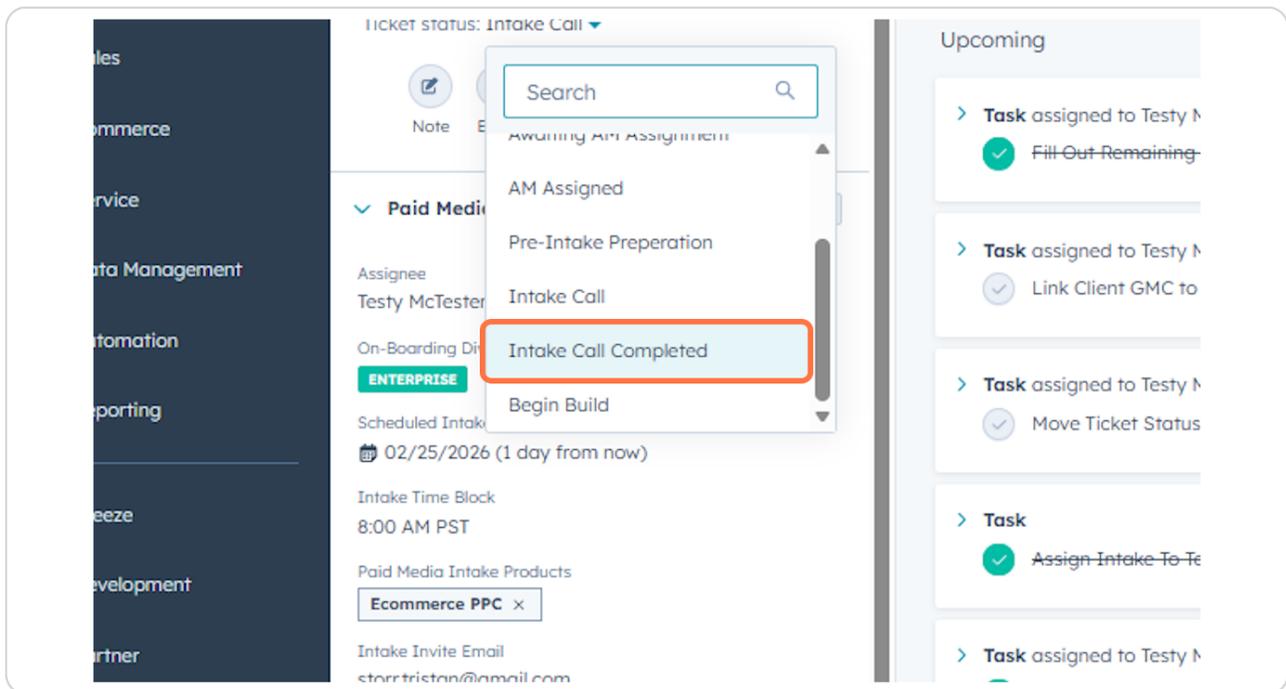
AM marks each task complete when the action is completed.



STEP 24

AM Moves Ticket Status Forward Once Intake Call Is Completed

With the Intake Call Completed, move the ticket status forward from Intake Call to Intake Call Completed. This is done manually by the AM and serves as the trigger for a new set of post-intake tasks that need to be completed before the build can start.

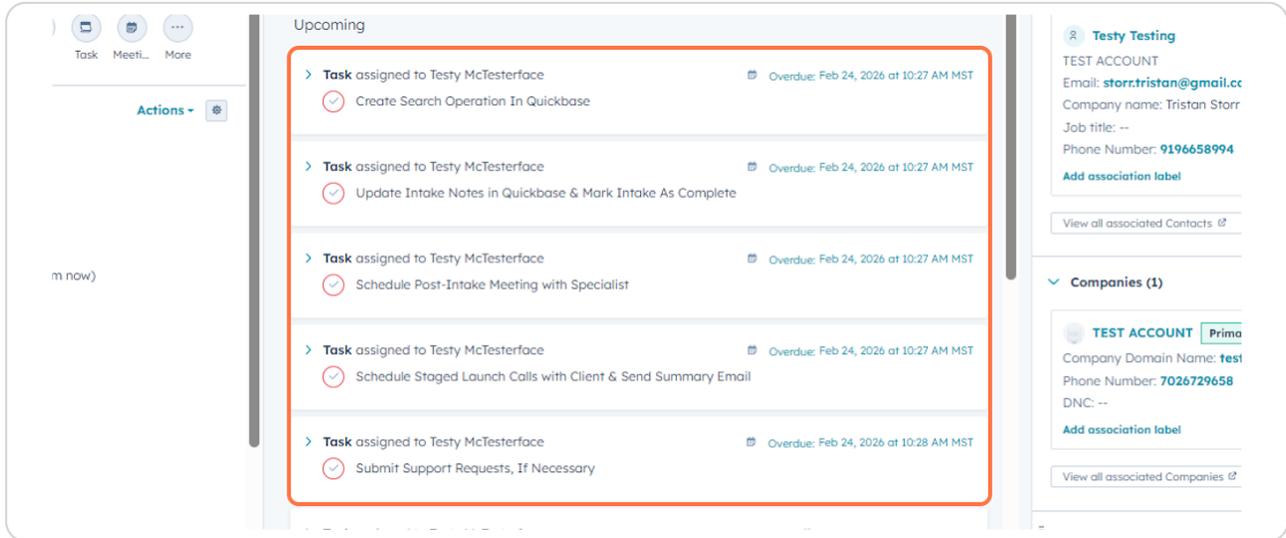


The screenshot displays a ticket management interface. At the top, the ticket status is set to 'Intake Call'. A dropdown menu is open, showing a search bar and a list of status options: 'Awaiting AM Assignment', 'AM Assigned', 'Pre-Intake Preparation', 'Intake Call', 'Intake Call Completed', and 'Begin Build'. The 'Intake Call Completed' option is highlighted with a red rectangular border. To the right of the dropdown, an 'Upcoming' section lists several tasks assigned to 'Testy M', including 'Fill Out Remaining', 'Link Client GMC to', 'Move Ticket Status', and 'Assign Intake To Te'. The interface also shows a sidebar with navigation options like 'Commerce', 'Service', and 'Automation', and a main content area with details such as 'Assignee: Testy McTester', 'On-Boarding Date: 02/25/2026', and 'Intake Time Block: 8:00 AM PST'.

STEP 25

Post-Intake Tasks Are Generated

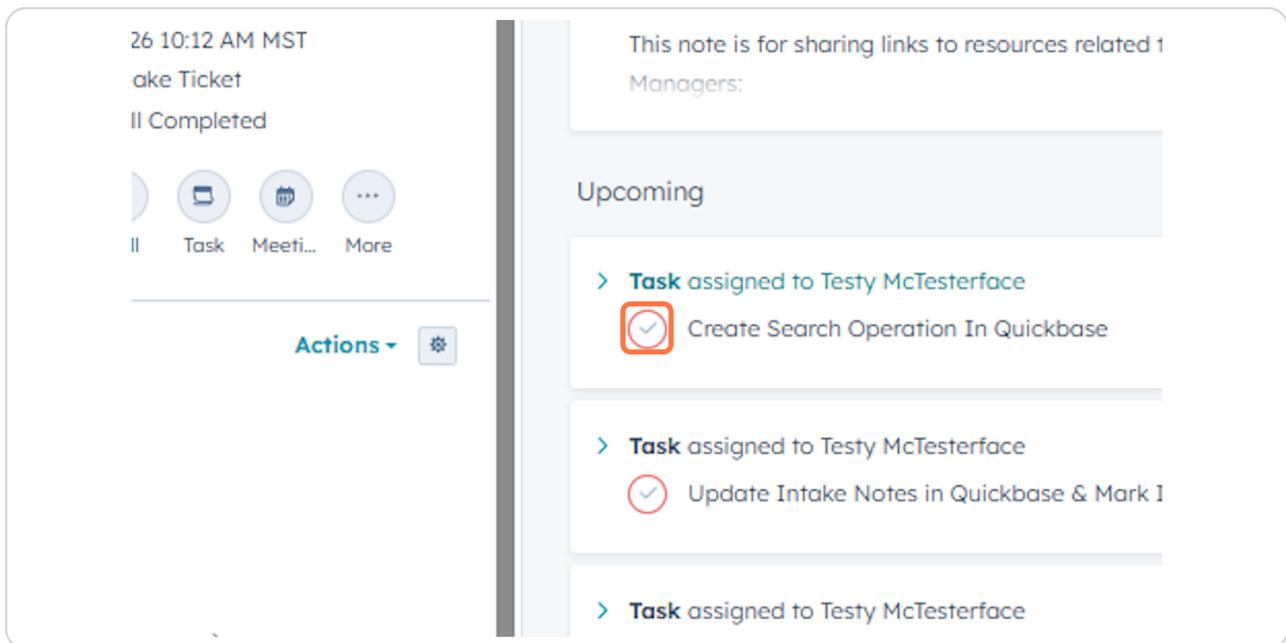
Several Post-Intake Tasks are generated for the AM to complete. Many of these tasks are familiar actions taken in Quickbase or with the Specialist post-intake.



STEP 26

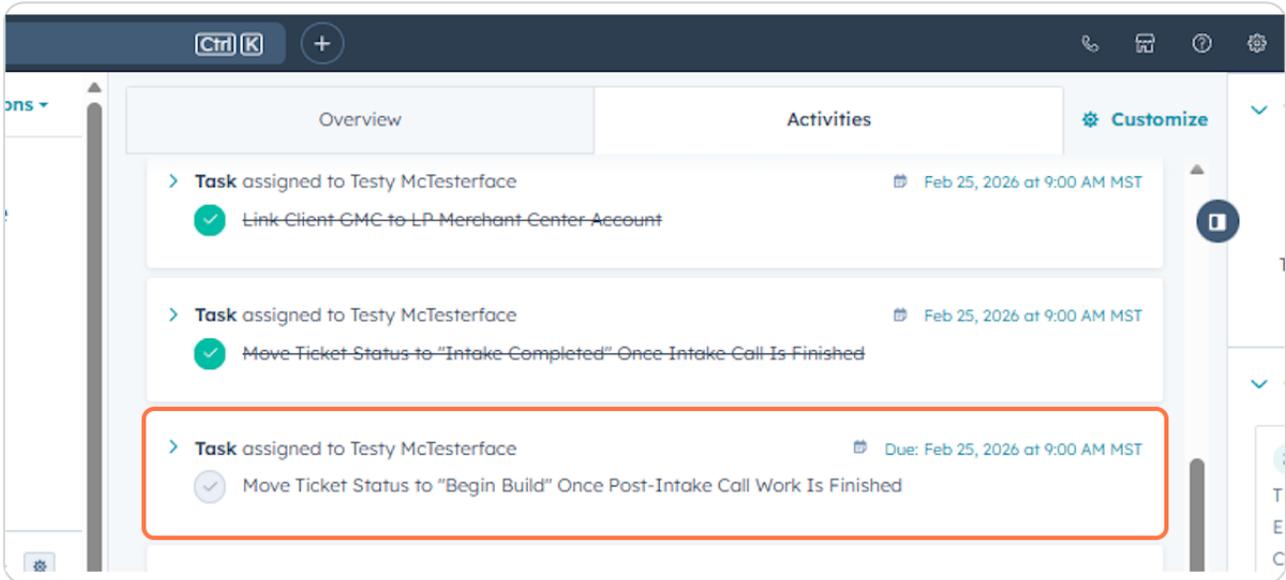
AM Marks Each Post-Intake Task As Completed

As the AM completes each task, mark them as completed on the Intake Ticket record.



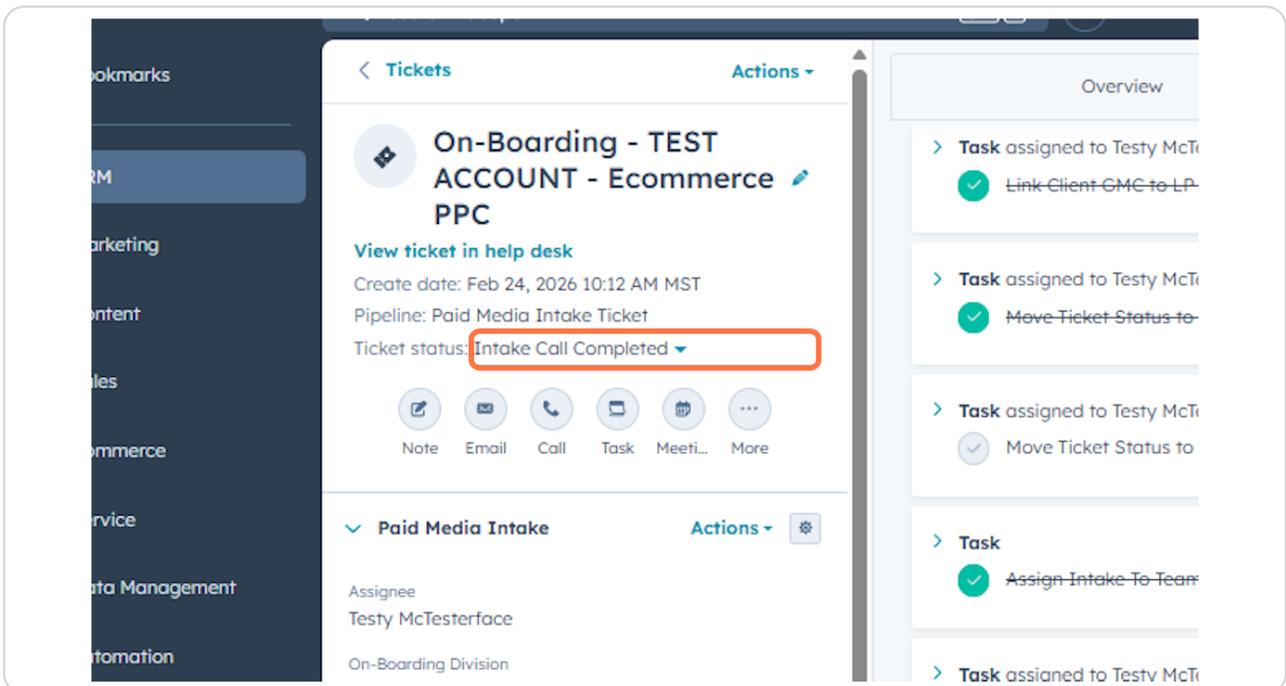
STEP 27

With All Post-Intake Work Completed, AM Completes "Move Ticket Status To Begin Build" Status



STEP 28

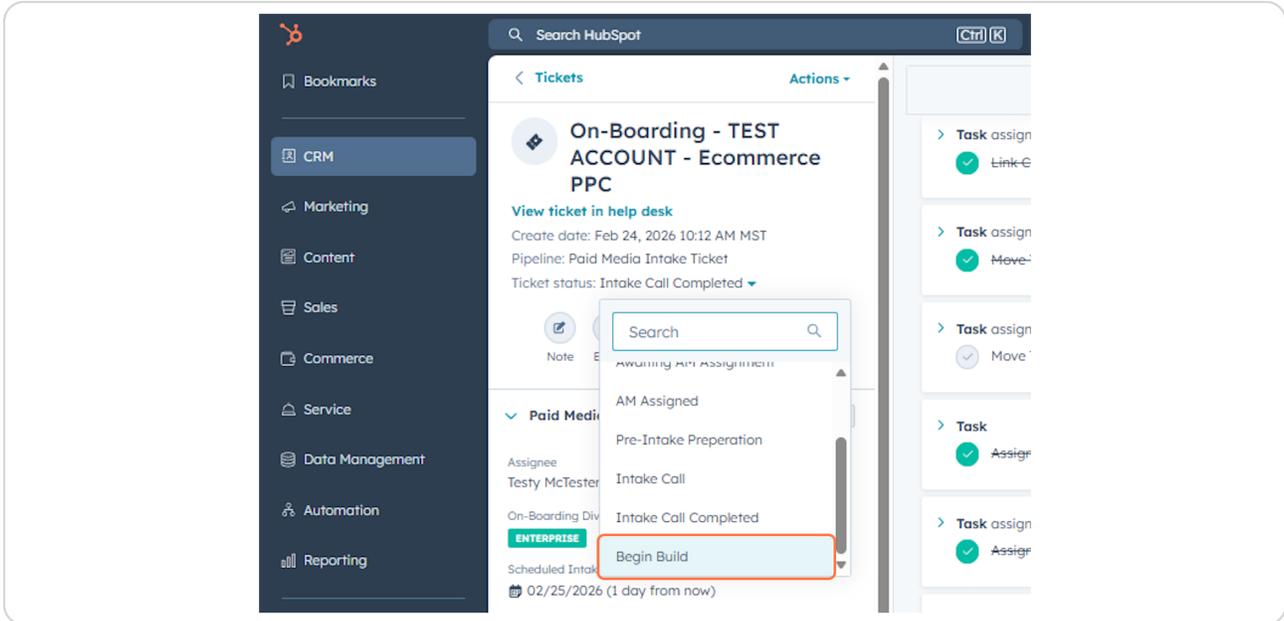
Click on Intake Call Completed



STEP 29

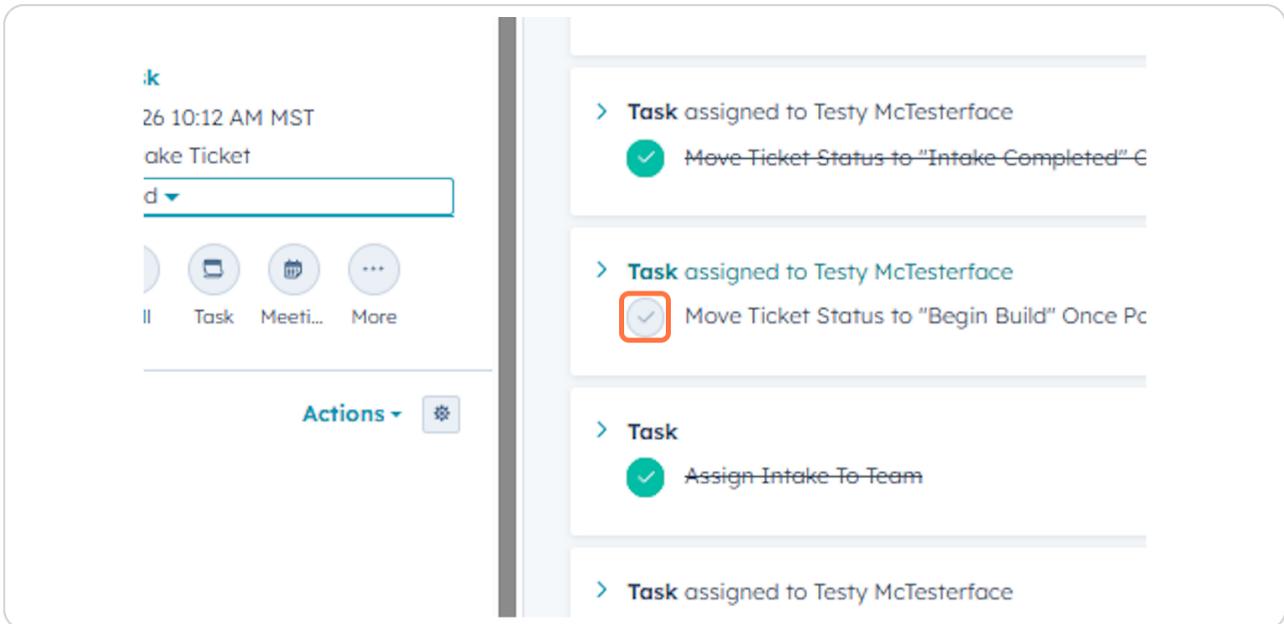
AM Manually Moves Ticket To Begin Build

AM moves the Ticket Status property to Begin Build. This action kicks off the Build in the corresponding On-Boarding Project of the Service.



STEP 30

AM Completes "Move Ticket To Begin Build"



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