

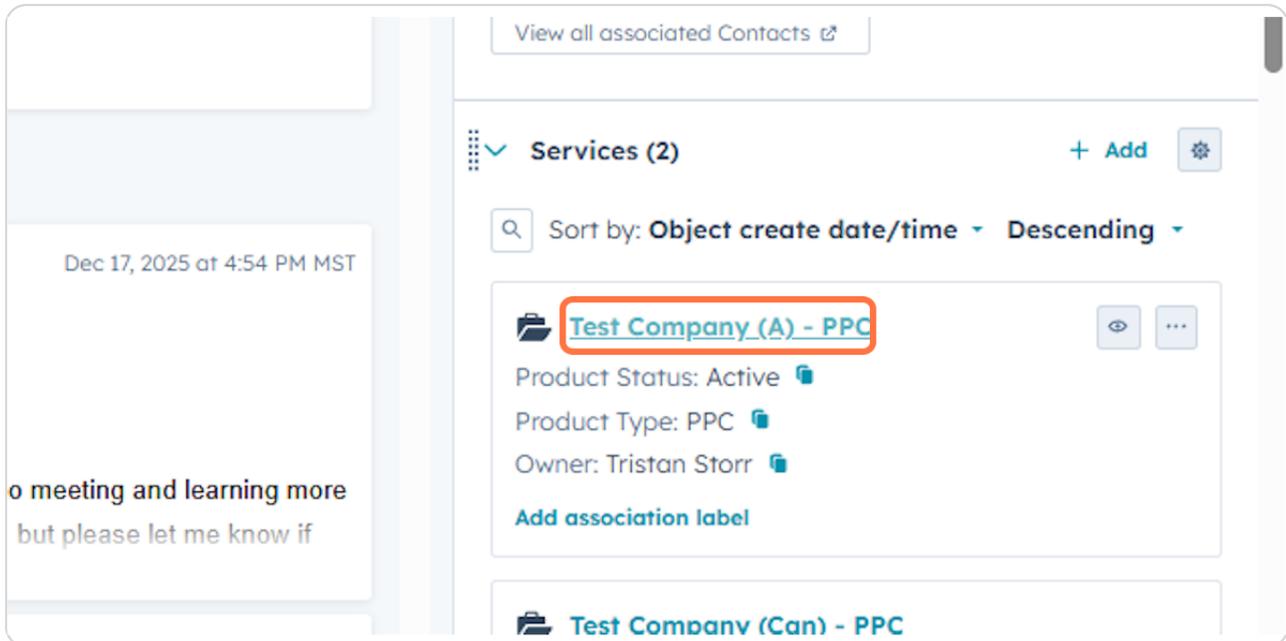
Submit and Manage Back Office Request Tickets in HubSpot

26 Steps [View most recent version on Tango.ai](#) 

Created by	Creation Date	Last Updated
Logical Position	Jan 12, 2026	Jan 12, 2026

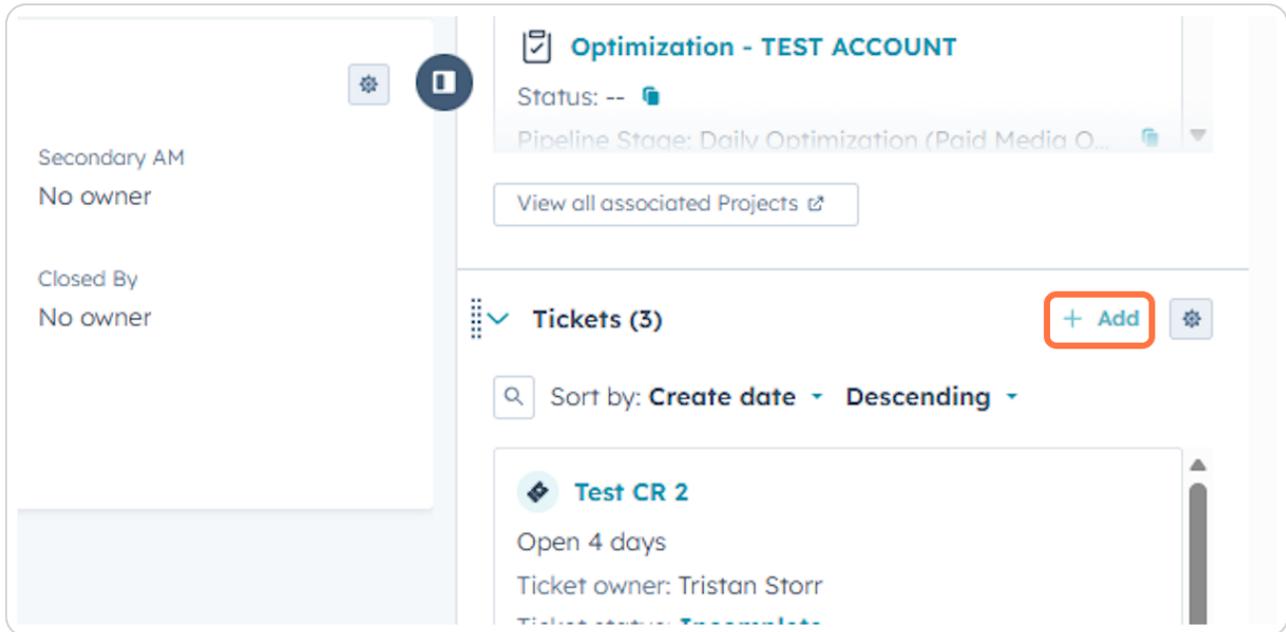
STEP 1

From the Company or Project record that you manage, click down to the Service you wish to submit a request for. It's important that requests are submitted from the Service to ensure that they are assigned to the appropriate Specialist or Account Manager.



STEP 2

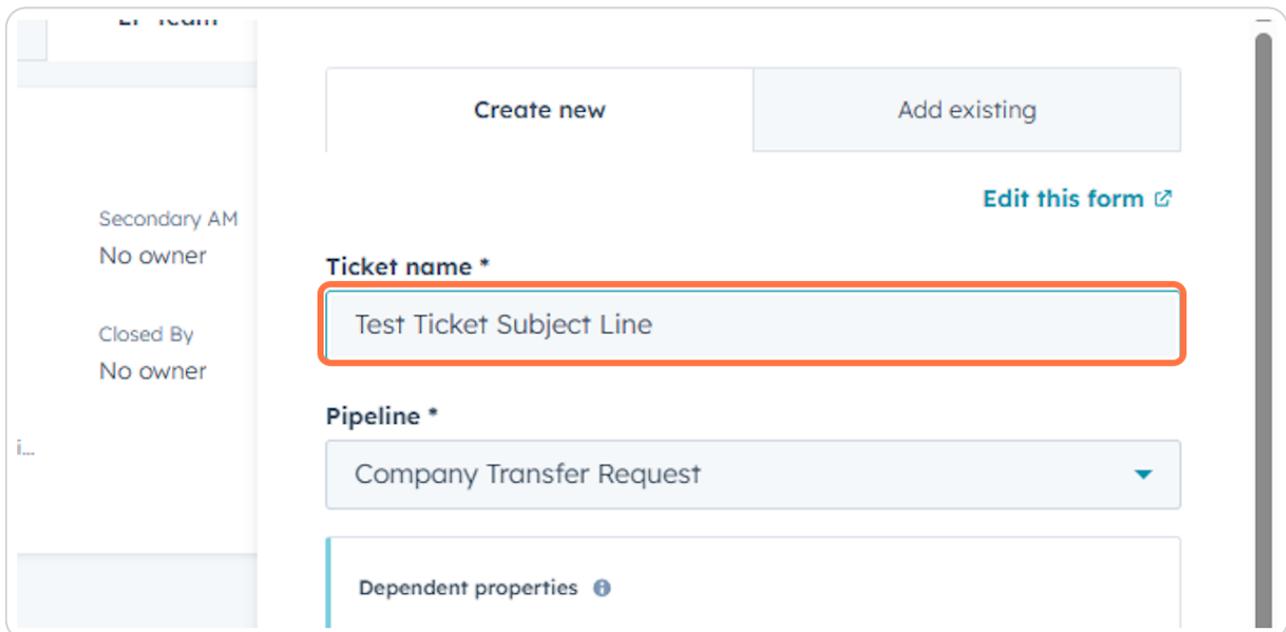
Click on "+Add" in the Tickets association card on the Service record. This will open the Create Ticket form on the right side of the page.



The screenshot shows a service record for 'Optimization - TEST ACCOUNT'. On the left, there are fields for 'Secondary AM' (No owner) and 'Closed By' (No owner). The main content area shows the service details: 'Status: --', 'Pipeline Stage: Daily Optimization (Paid Media O...', and a button 'View all associated Projects'. Below this is a 'Tickets (3)' association card with a '+ Add' button highlighted in a red box. The card also shows a search filter 'Sort by: Create date - Descending' and a list item 'Test CR 2' with details 'Open 4 days' and 'Ticket owner: Tristan Storr'.

STEP 3

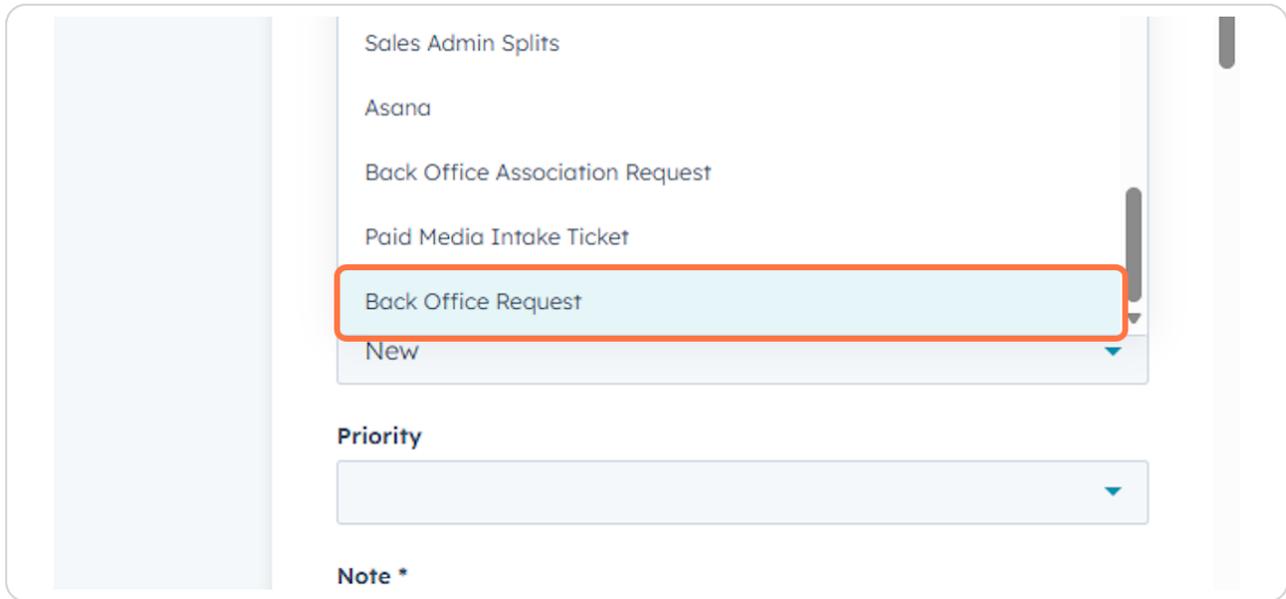
Provide a Subject of the Request in the Ticket Name field



The screenshot shows the 'Create Ticket' form. At the top, there are buttons for 'Create new' and 'Add existing', and a link 'Edit this form'. The form has a left sidebar with 'Secondary AM' (No owner) and 'Closed By' (No owner). The main form fields are: 'Ticket name *' with the value 'Test Ticket Subject Line' highlighted in a red box; 'Pipeline *' with the value 'Company Transfer Request'; and 'Dependent properties' with an information icon.

STEP 4

Select Back Office Request as the Pipeline



Sales Admin Splits

Asana

Back Office Association Request

Paid Media Intake Ticket

Back Office Request

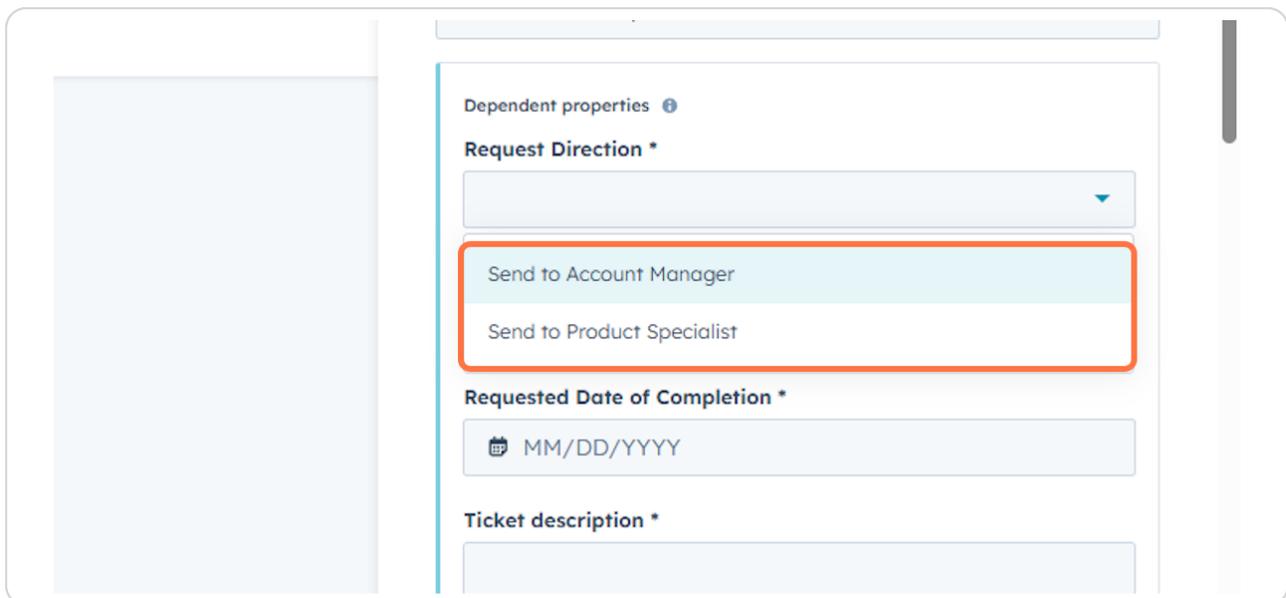
New

Priority

Note *

STEP 5

Select your Request Direction. If you want the request to be fulfilled by the AM (Client Communication Request), select "Send to Account Manager". If you want the request to be fulfilled by the Specialist (Change Request), select "Send to Product S



Dependent properties ⓘ

Request Direction *

Send to Account Manager

Send to Product Specialist

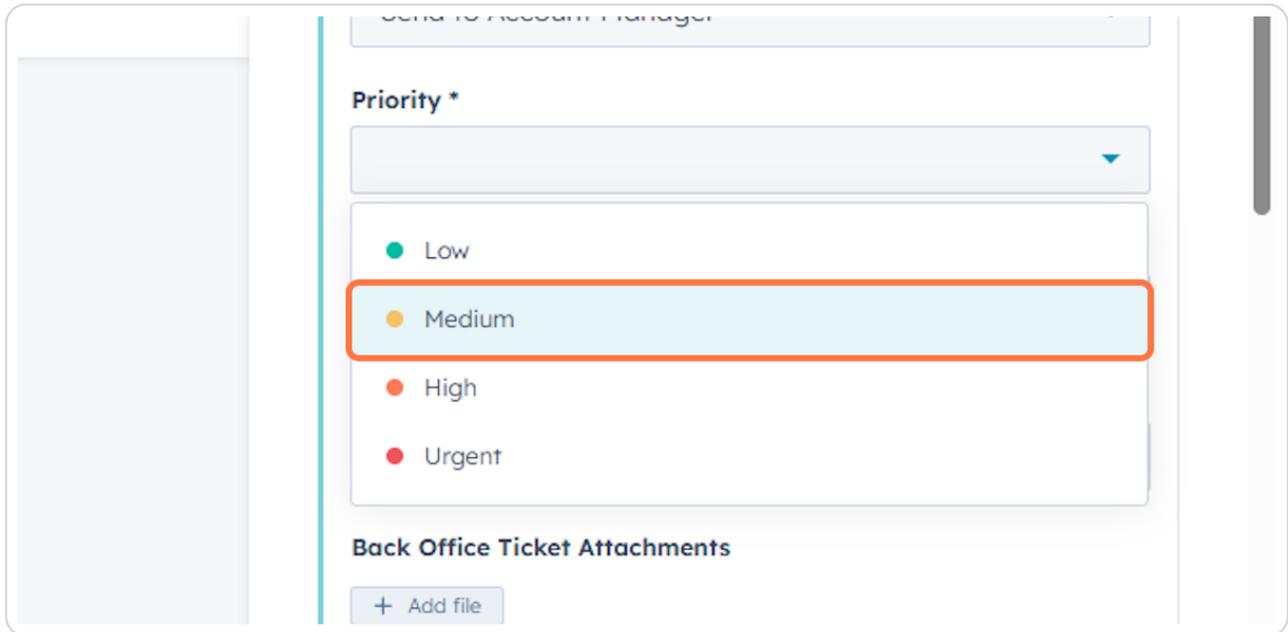
Requested Date of Completion *

MM/DD/YYYY

Ticket description *

STEP 6

Select a Priority. Options are Low, Medium, High, Urgent



Send to Account Manager

Priority *

▼

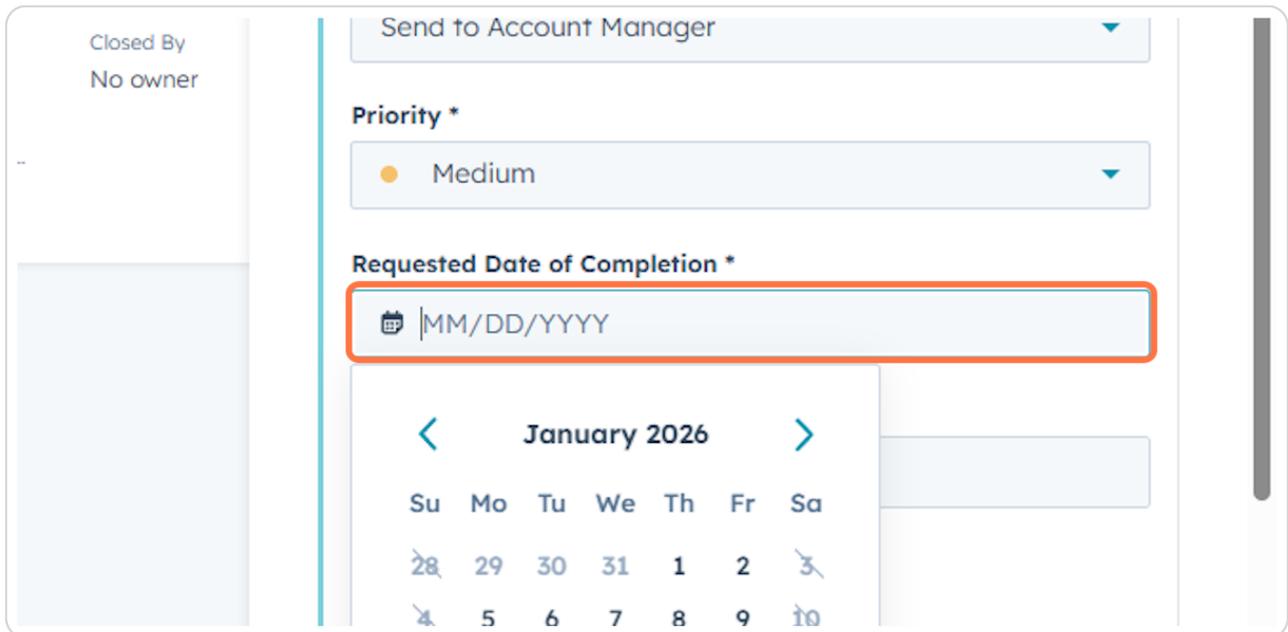
- Low
- **Medium**
- High
- Urgent

Back Office Ticket Attachments

+ Add file

STEP 7

Select a Requested Date of Completion. Ensure that the date you choose aligns with the priority level you selected earlier.



Closed By
No owner

Send to Account Manager

Priority *

● Medium

Requested Date of Completion *

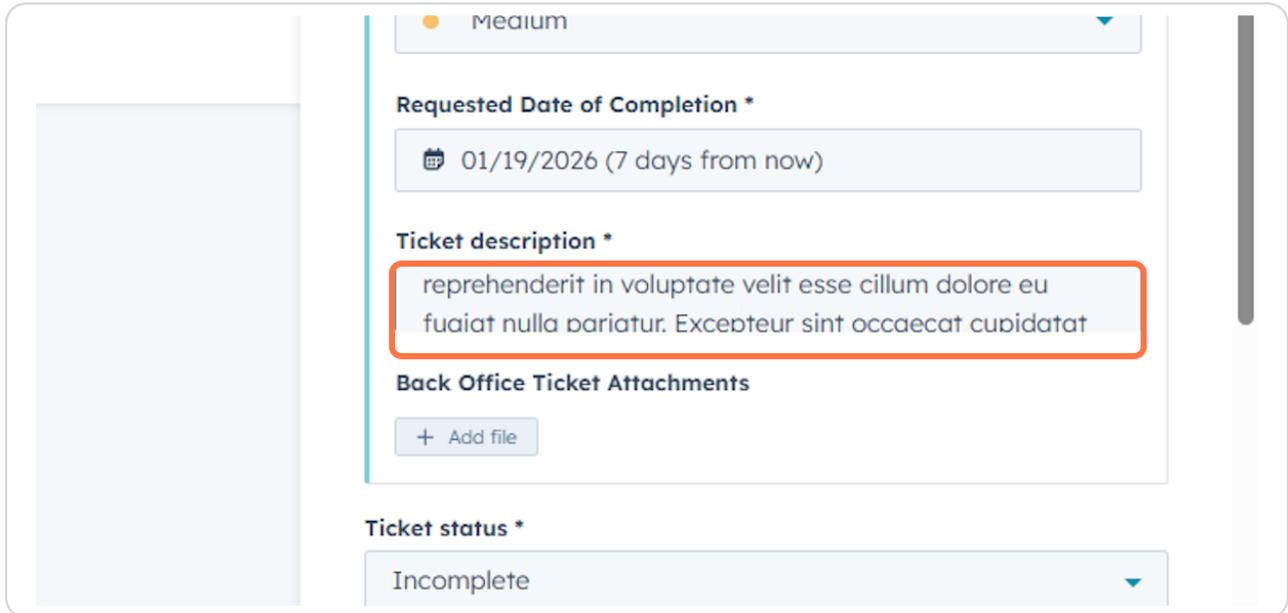
📅 MM/DD/YYYY

< January 2026 >

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10

STEP 8

Add a written description of the Communication or Change you are requesting from the AM or Specialist. Be detailed as possible to ensure the assignee can complete the request quickly.

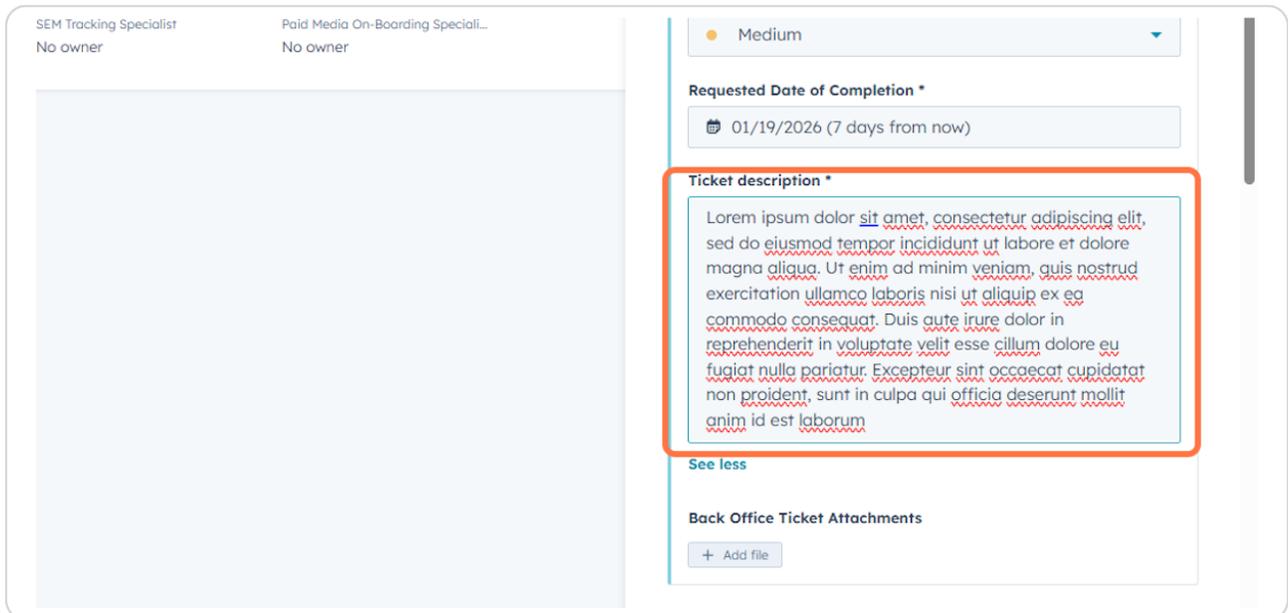


The screenshot shows a ticket form with the following fields:

- Medium:** A dropdown menu set to "Medium".
- Requested Date of Completion *:** A date picker set to "01/19/2026 (7 days from now)".
- Ticket description *:** A text area containing the placeholder text "reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat". This field is highlighted with a red border.
- Back Office Ticket Attachments:** A section with a "+ Add file" button.
- Ticket status *:** A dropdown menu set to "Incomplete".

STEP 9

The Ticket description property will expand as you type for easier readability.



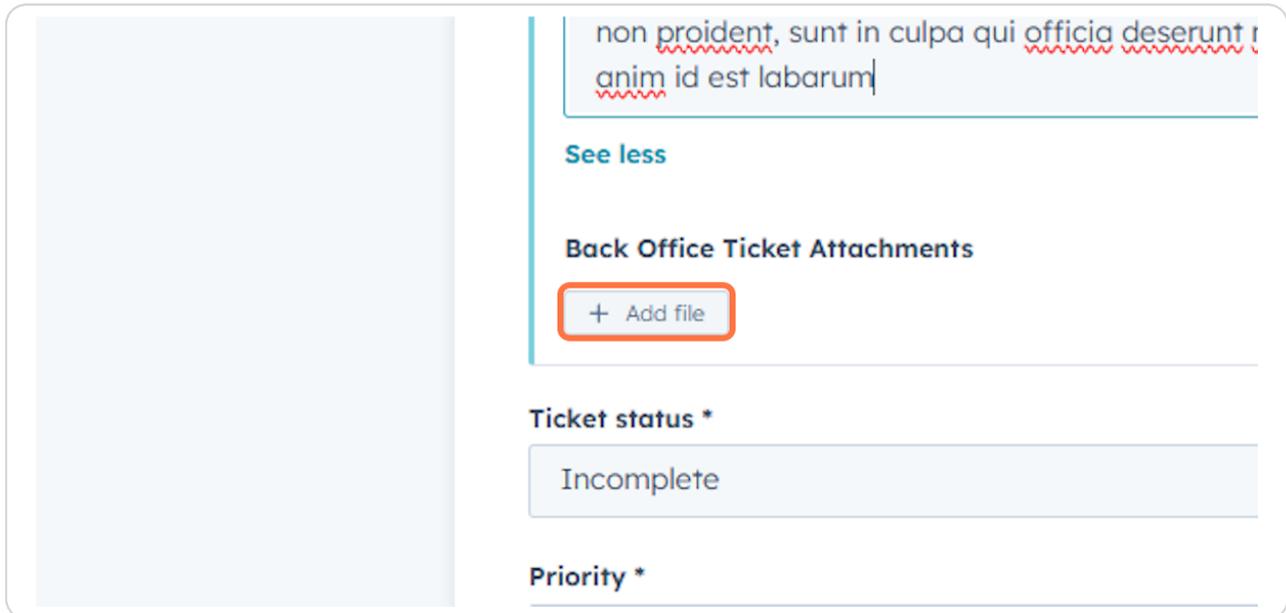
The screenshot shows the same ticket form as in Step 8, but with the 'Ticket description' field expanded. The text in the field is now a full paragraph of Lorem Ipsum text, and the field is highlighted with a red border. The text is as follows:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum

Below the text, there is a "See less" link. The rest of the form (Medium, Date, Attachments, Status) remains the same as in Step 8.

STEP 10

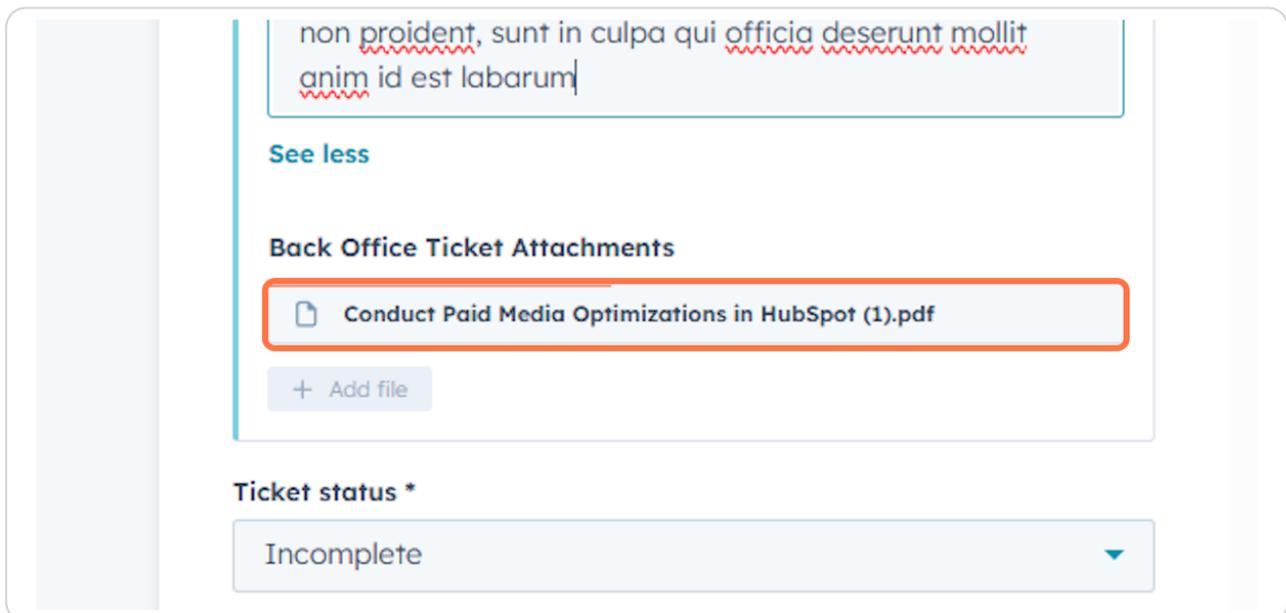
If necessary, add any attachments to the Ticket with the "Add File" button below Ticket Description.



The screenshot shows a ticket form with a text area containing placeholder text: "non proident, sunt in culpa qui officia deserunt mollit anim id est labarum". Below the text area is a "See less" link. Underneath is a section titled "Back Office Ticket Attachments" which contains a button labeled "+ Add file" that is highlighted with a red border. Below this section are two dropdown menus: "Ticket status *" with the value "Incomplete" and "Priority *" which is currently empty.

STEP 11

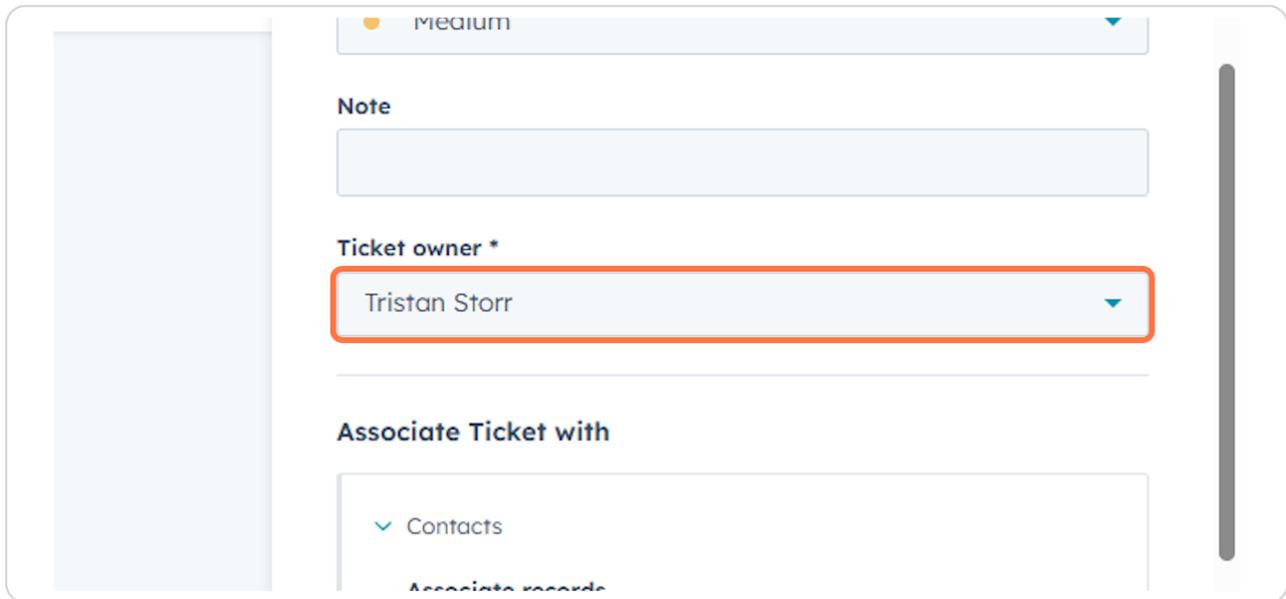
You can add multiple file attachments. Allow the file to complete uploading, select Add File again, and add a new attachment.



The screenshot shows the same ticket form as in Step 10, but now with a file attachment. The "Back Office Ticket Attachments" section contains a file named "Conduct Paid Media Optimizations in HubSpot (1).pdf" with a document icon, which is highlighted with a red border. Below the file list is a "+ Add file" button. The "Ticket status *" dropdown menu now shows "Incomplete" with a downward arrow, and the "Priority *" dropdown menu remains empty.

STEP 12

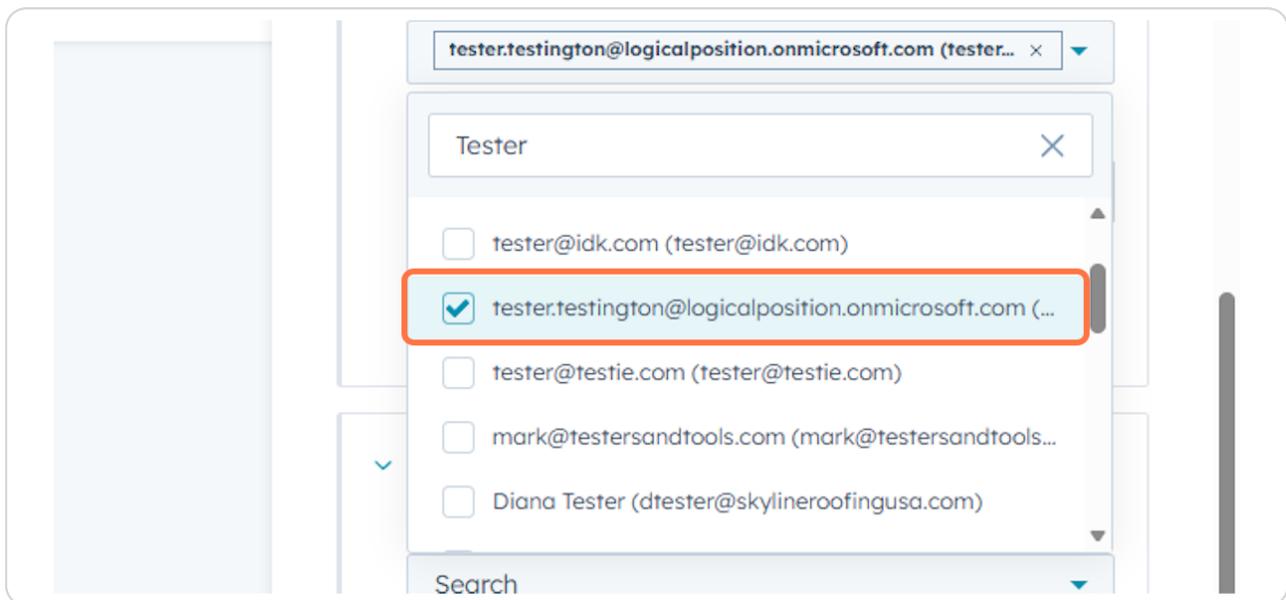
As the Submitter, you will be listed as the Ticket Owner. The Ticket Assignee will automatically be defaulted to the AM/Specialist assigned to the Service record you submit from.



The screenshot shows a form with a 'medium' severity dropdown at the top. Below it is a 'Note' text area. The 'Ticket owner *' dropdown menu is highlighted with a red border and contains the name 'Tristan Storr'. Below this is the 'Associate Ticket with' section, which has a 'Contacts' dropdown menu.

STEP 13

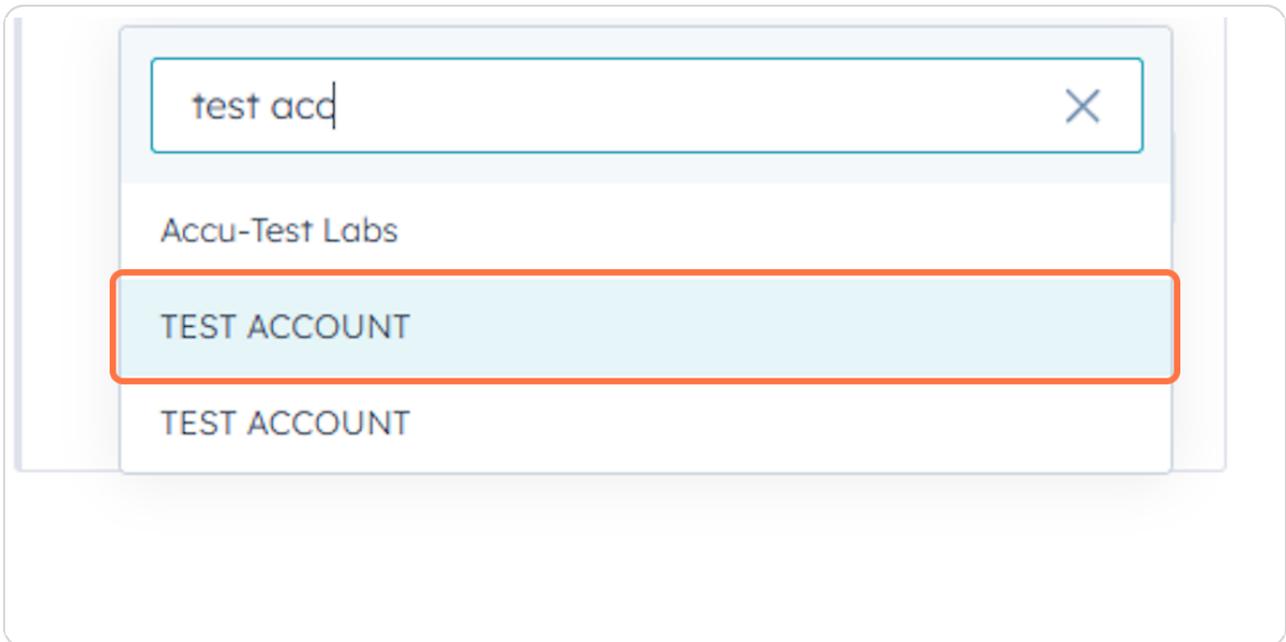
Check tester.testington@logicalposition.onmicrosoft.com (tester.testington@logicalposition.onmicrosoft.com)



The screenshot shows a dropdown menu for selecting a contact. The search bar contains 'tester'. The dropdown list includes several email addresses with checkboxes. The option 'tester.testington@logicalposition.onmicrosoft.com (...)' is selected and highlighted with a red border. Other options include 'tester@idk.com', 'tester@testie.com', 'mark@testersandtools.com', and 'Diana Tester (dtester@skylinerootingusa.com)'. A 'Search' button is visible at the bottom of the dropdown.

STEP 14

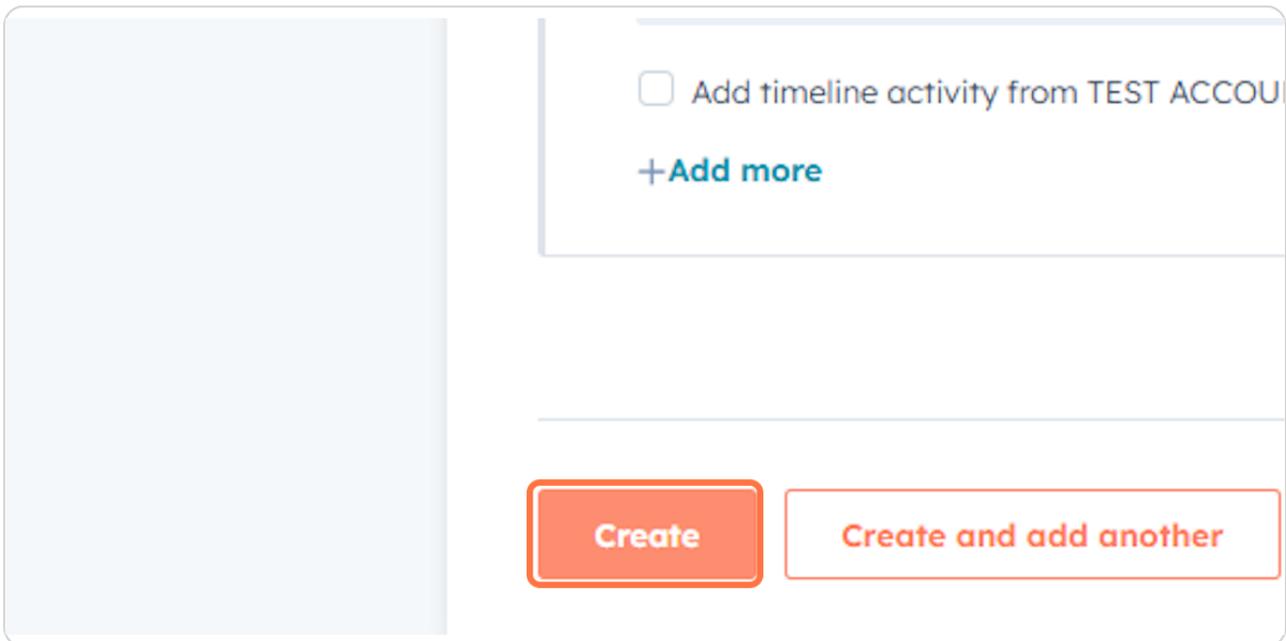
Associate your request with a relevant company, if necessary.



A search dropdown menu is shown with the text 'test acc' in the input field. Below the input field, three search results are listed: 'Accu-Test Labs', 'TEST ACCOUNT', and 'TEST ACCOUNT'. The second 'TEST ACCOUNT' result is highlighted with a red rectangular border.

STEP 15

Click on Create to submit your ticket



A form interface is shown. On the right side, there is a checkbox labeled 'Add timeline activity from TEST ACCOU' and a '+Add more' link. At the bottom of the form, there are two buttons: 'Create' and 'Create and add another'.

STEP 16

Once the Ticket is created, you'll find key details at the top of the record form, in the Back Office Request form. Data Highlights include Due Date, Attachment Links, and Ad Spend. You can also see the Request Description front and center.

The screenshot shows a web interface for a 'Back Office Request'. The main content area is highlighted with an orange border and contains three sections:

- Data highlight:** A table with three columns: 'REQUESTED DATE OF COMPLETION' (01/19/2026 (7 days from now)), 'BACK OFFICE TICKET ATTACHMENTS' (Conduct Paid Media Optimizations in ...), and 'AD SPEND' (\$2,000).
- Request Description:** A section with a 'Ticket description' and a paragraph of placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum'.
- Status Tracker:** A section showing 'Ticket status: Incomplete -' and a progress bar.

On the right side of the interface, there are sections for 'Tickets (0)', 'Contacts (1)' (listing 'tester.testington@logic'), and 'Companies (2)' (listing 'TEST ACCOUNT').

STEP 17

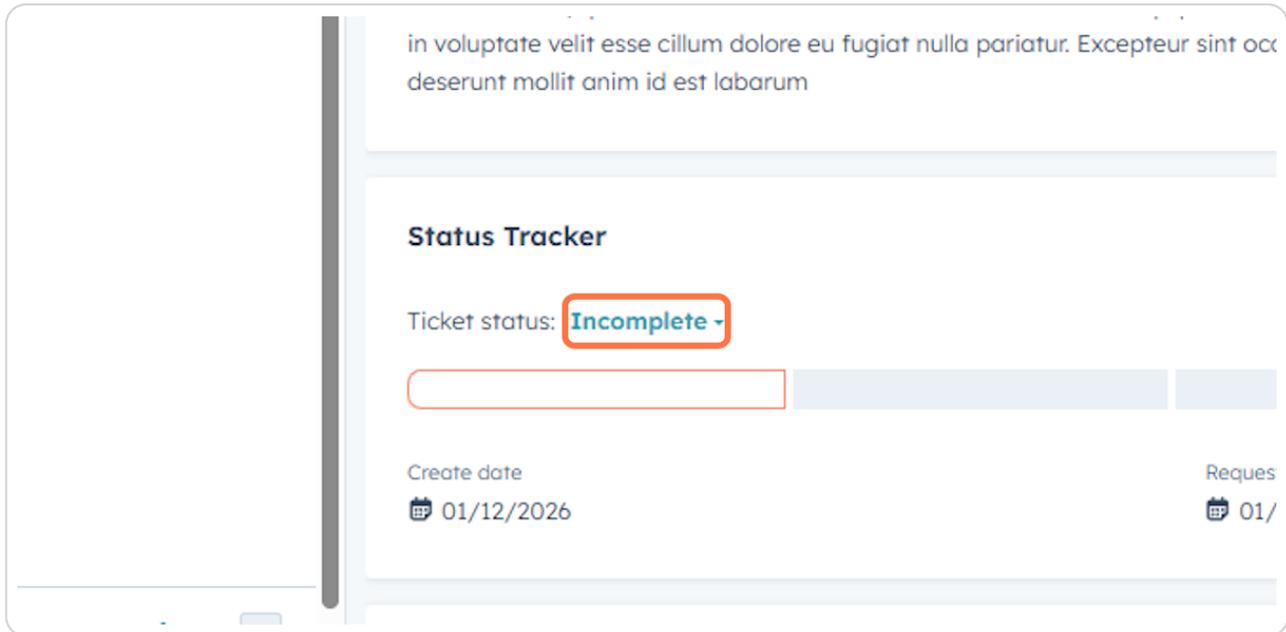
Below Request description you can see your Ticket Status tracker. All requests begin in an "Incomplete" status.

This screenshot shows a closer view of the 'Request Description' and 'Status Tracker' sections. The 'Status Tracker' is highlighted with an orange border and shows 'Ticket status: Incomplete -' with a progress bar. Below it, the 'Time Until Due' section is visible, showing 'Create date' (01/12/2026) and 'Requested Date of Completion' (01/19/2026 (7 days from now)).

The right sidebar remains the same, showing 'Contacts (1)' and 'Companies (2)'.

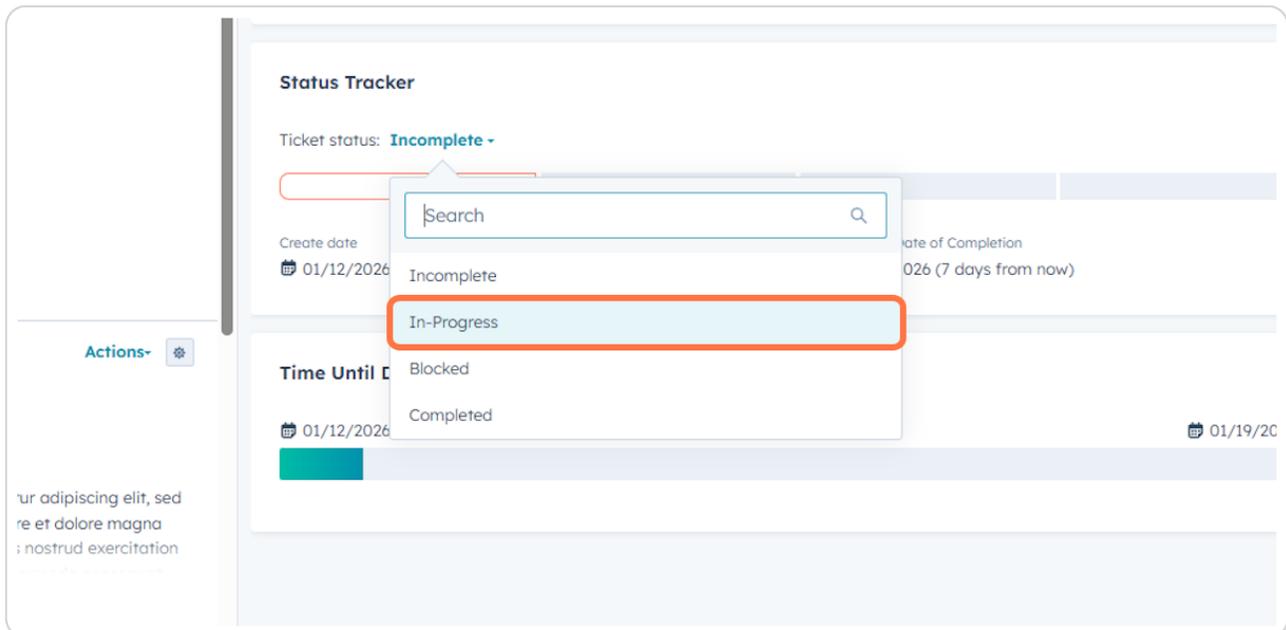
STEP 18

Use this card to modify the Ticket Status as you progress through the request by selecting the Ticket Status dropdown.



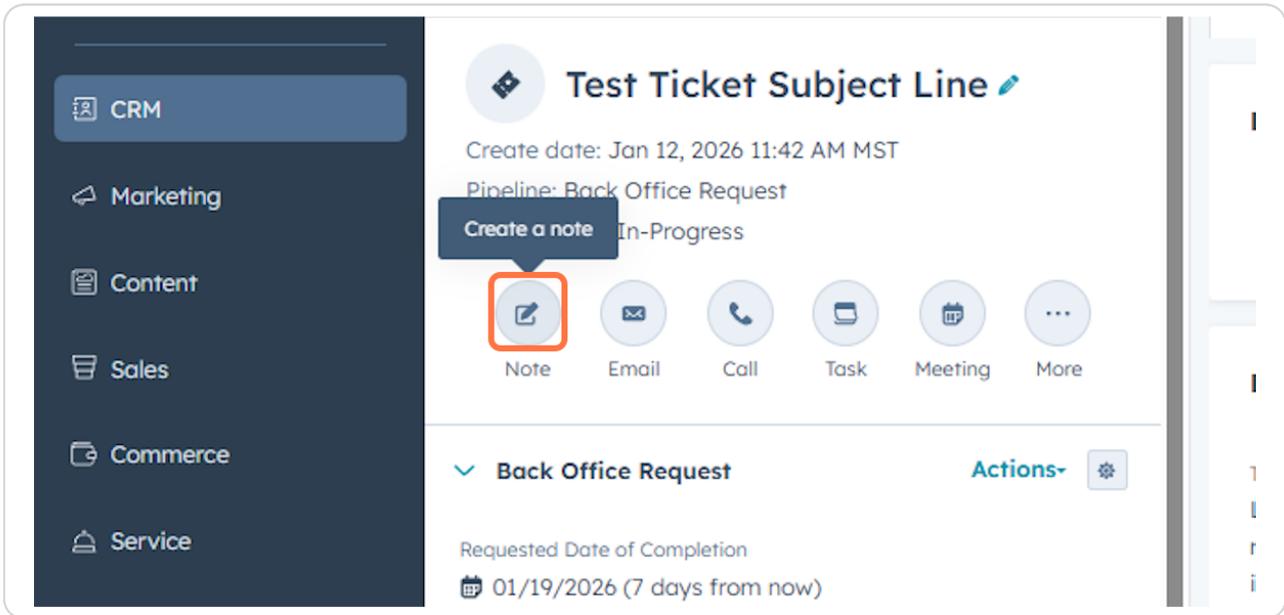
STEP 19

You can move to In-Progress, Blocked, or Completed



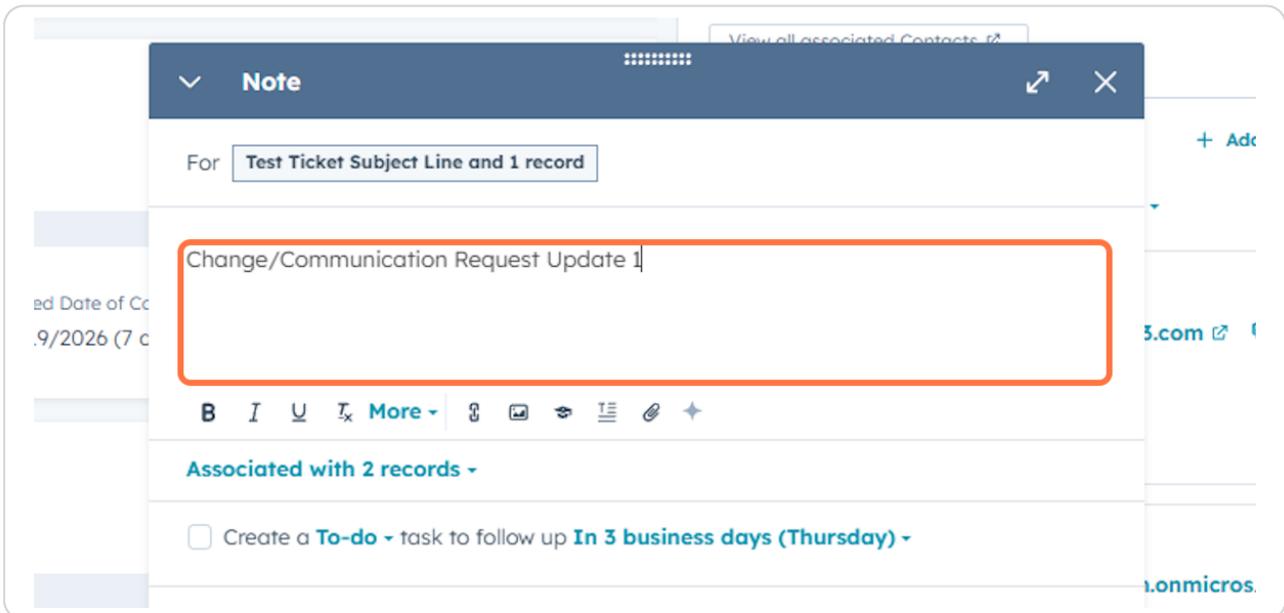
STEP 20

To provide updates on the request, create new Note activities using the activity bar in the top left.



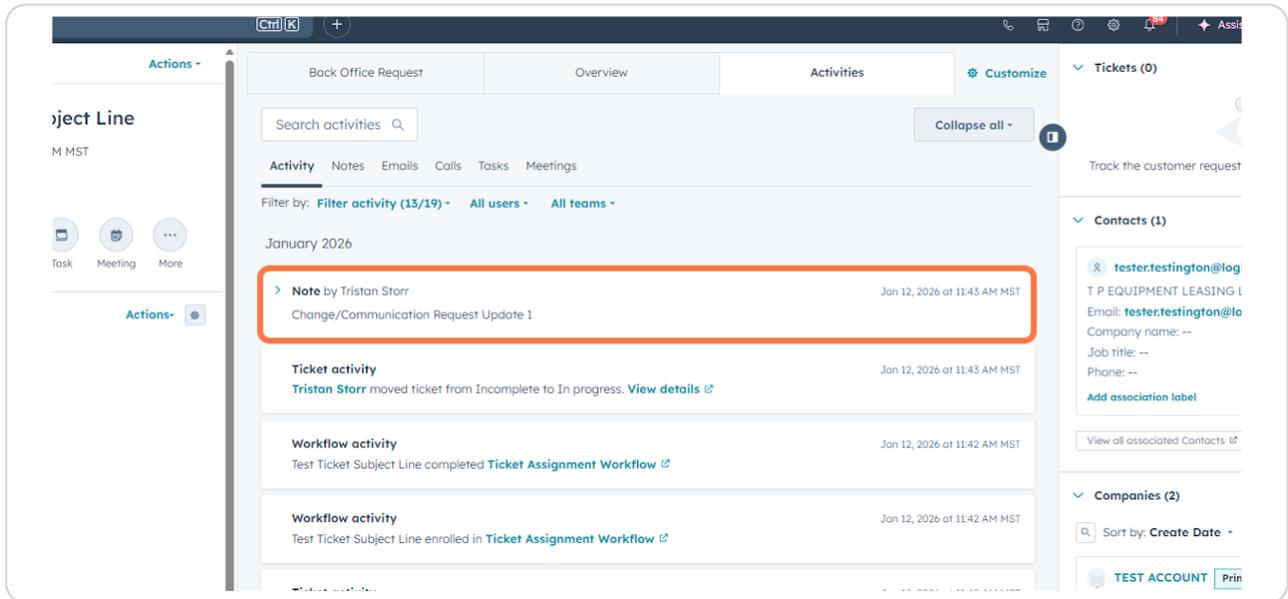
STEP 21

Write out your update. Use the @ symbol to tag users for enhanced visibility. You can also add attachments to individual note activities if needed.



STEP 22

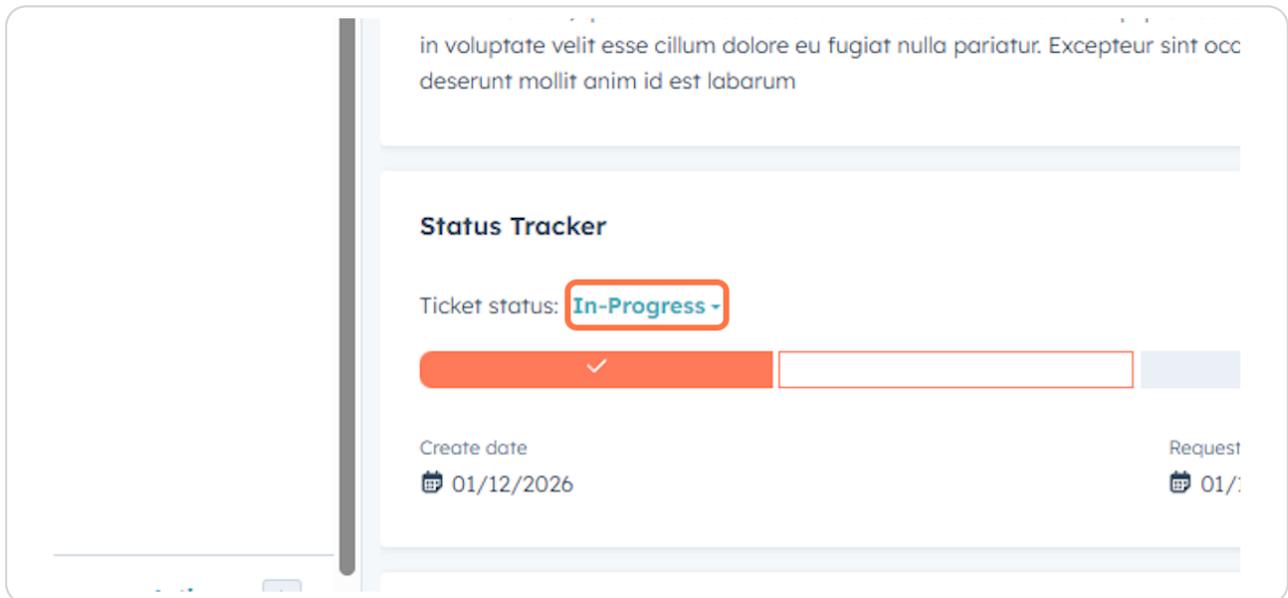
Your new note will be visible in the Activity feed of the ticket record. You can also associate these notes with the Company, Contact, Service, or Project records that are relevant.



The screenshot shows a web application interface for ticket management. The main area is titled 'Activities' and contains a list of recent actions. A red box highlights a 'Note' entry: 'Note by Tristan Storr' with the text 'Change/Communication Request Update 1' and a timestamp of 'Jan 12, 2026 at 11:45 AM MST'. Below the note are other activity entries, including 'Ticket activity' and 'Workflow activity'. The left sidebar shows 'Subject Line' and 'Actions' tabs. The right sidebar displays 'Tickets (0)', 'Contacts (1)', and 'Companies (2)'.

STEP 23

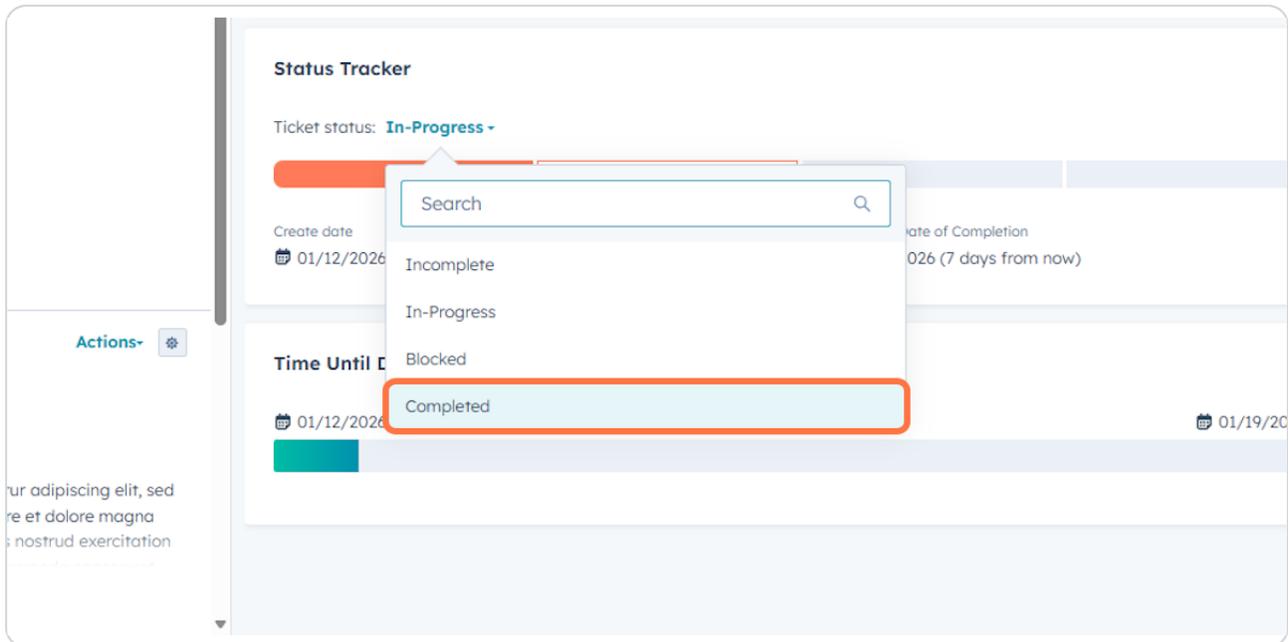
As you leave notes on your progress, make sure that you are updating the status of the Ticket accordingly.



The screenshot shows a 'Status Tracker' section for a ticket. The ticket status is displayed as 'In-Progress' in a dropdown menu, which is highlighted with a red box. Below the status is a progress bar with a checkmark icon. The 'Create date' is shown as '01/12/2026'. The 'Request' field is partially visible on the right.

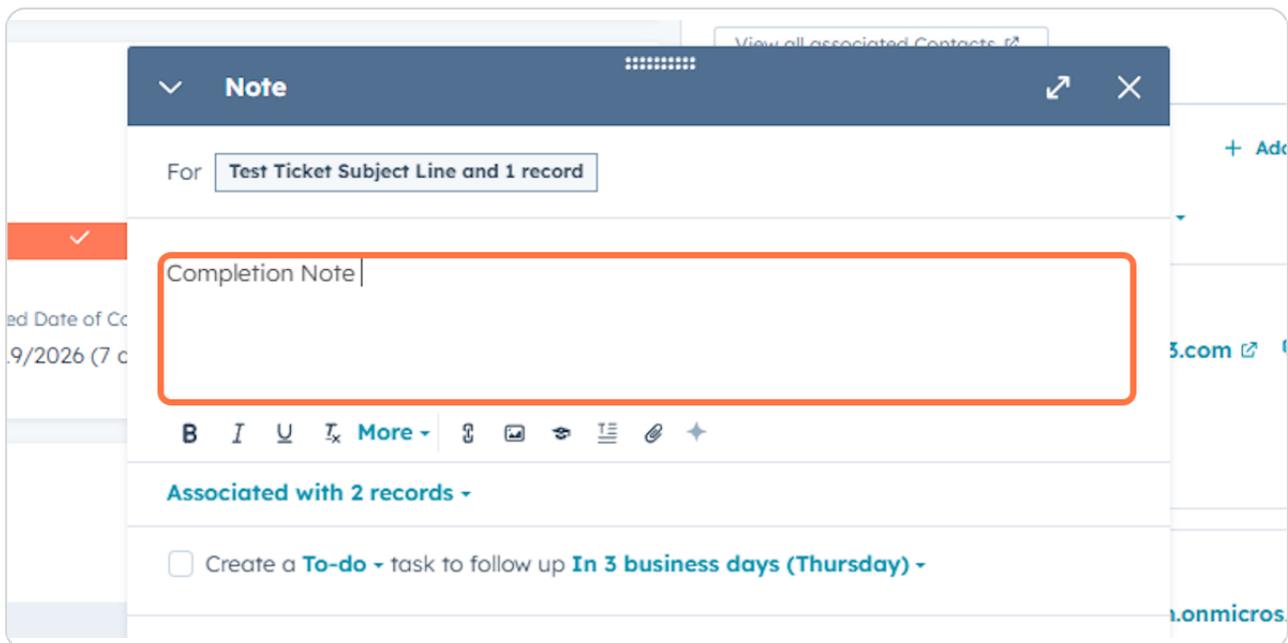
STEP 24

When the request has been fulfilled, move your Ticket Status to Completed.



STEP 25

Create a new note to log your completion notes.



STEP 26

Completion note will show in the Activity feed

The screenshot displays a CRM interface with an activity feed. The feed is filtered by user 'Tristan Storr' and shows several activity items. The first item, a note titled 'Completion Note 1', is highlighted with an orange border. Below it are two ticket activity items: one showing a transition from 'In progress' to 'Completed' and another from 'Incomplete' to 'In progress'. The right sidebar shows contact and company information for 'TEST ACCOUNT'.

Back Office Request Overview Activities Customize Tickets (0)

Search activities

Collapse all

Activity Notes Emails Calls Tasks Meetings

Filter by: Filter activity (13/19) All users All teams

By: Tristan Storr <tristan.storr@logicalposition.com>

Note by Tristan Storr Jan 12, 2026 at 11:44 AM MST
Completion Note 1

Ticket activity Jan 12, 2026 at 11:44 AM MST
Tristan Storr moved ticket from In progress to Completed. View details

Note by Tristan Storr Jan 12, 2026 at 11:43 AM MST
Change/Communication Request Update 1

Ticket activity Jan 12, 2026 at 11:43 AM MST
Tristan Storr moved ticket from Incomplete to In progress. View details

tester.testington@lo
T P EQUIPMENT LEASING
Email: tester.testington@l
Company name: --
Job title: --
Phone: --
Add association label
View all associated Contacts

Companies (2)
Sort by: Create Date
TEST ACCOUNT Pri

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