Submit and Manage Back Office Request Tickets in HubSpot

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

Created by

Logical Position

Creation Date

Jan 12, 2026

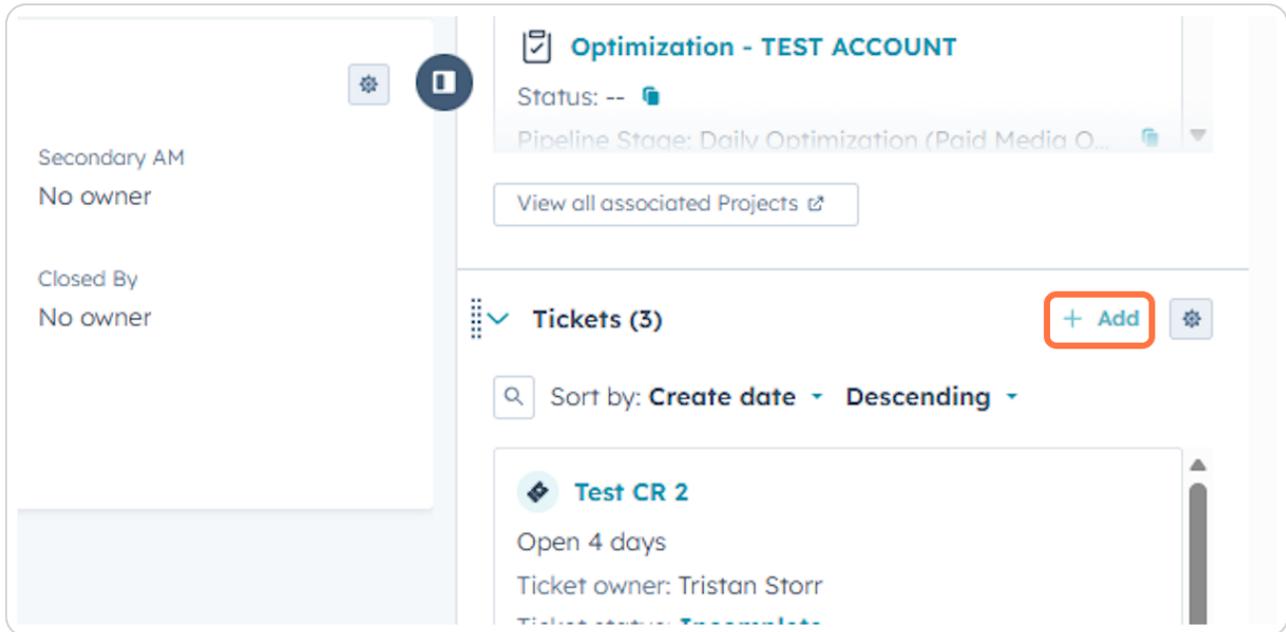Last Updated

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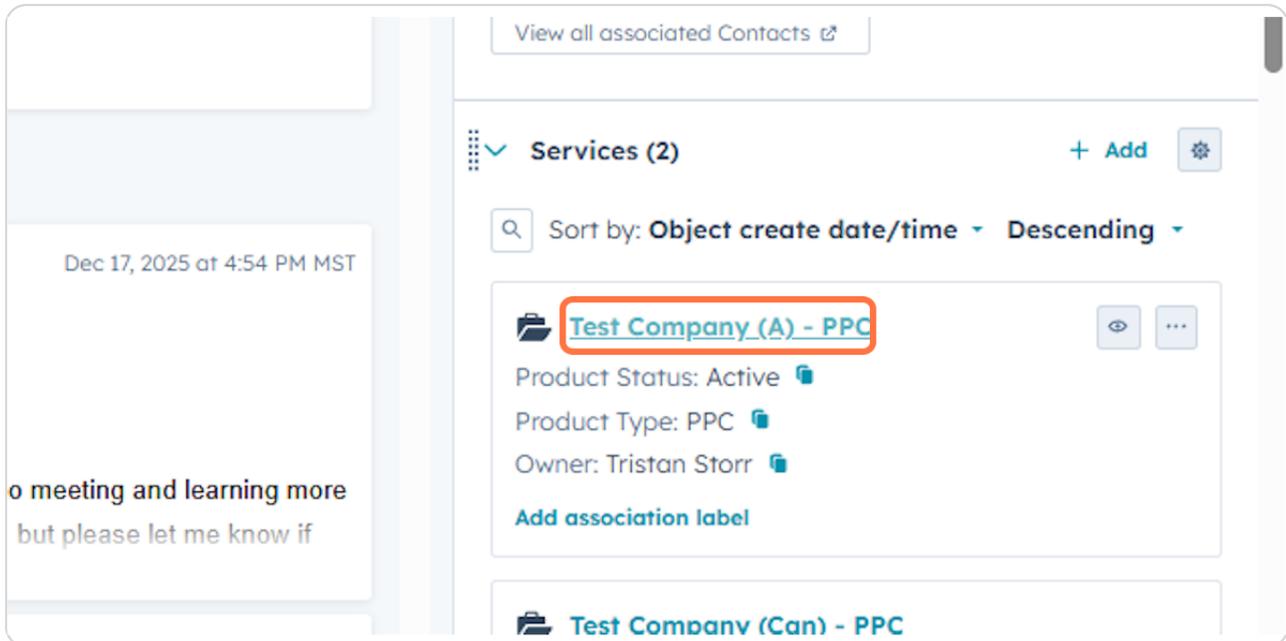
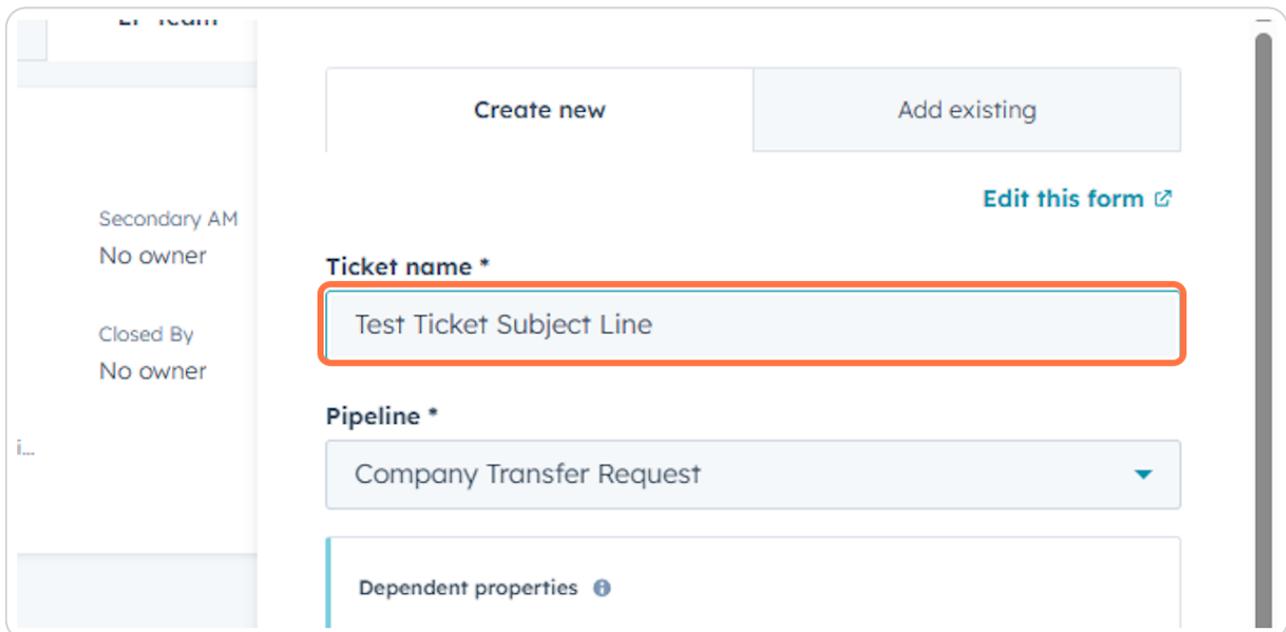**Click on "+Add" in the Tickets association card on the Service record. This will open the Create Ticket form on the right side of the page.**

STEP 3

<u>Provide a Subject of the Request in the Ticket Name field</u>

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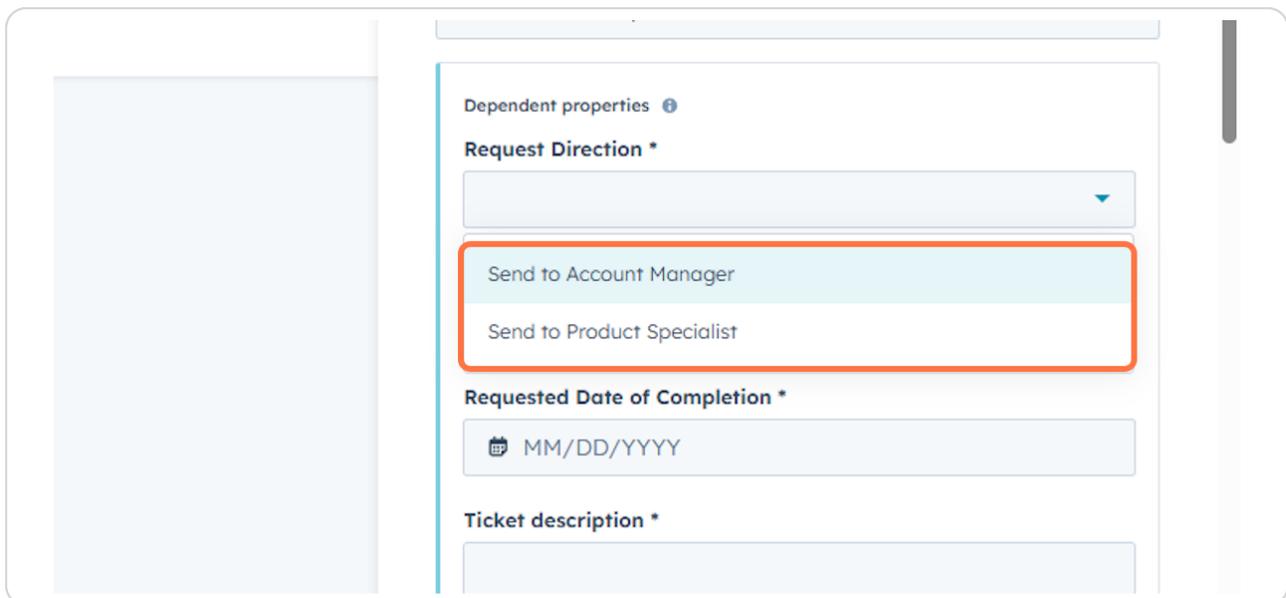
Select your Request Direction. If you want the request to be fulfilled by the AM (Client Communication Request), select "Send to Account Manager". If you want the request to be fulfilled by the Specialist (Change Request), select "Send to Product S

Select a Priority. Options are Low, Medium, High, Urgent
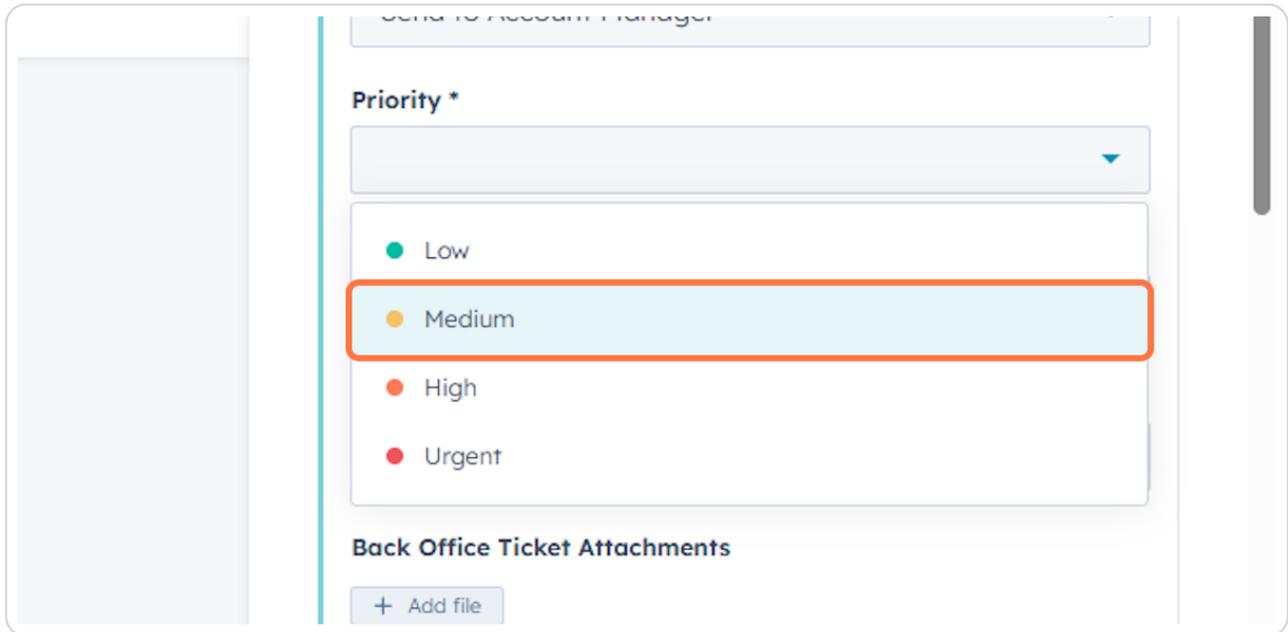
Select a Requested Date of Completion. Ensure that the date you choose aligns with the priority level you selected earlier.

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.
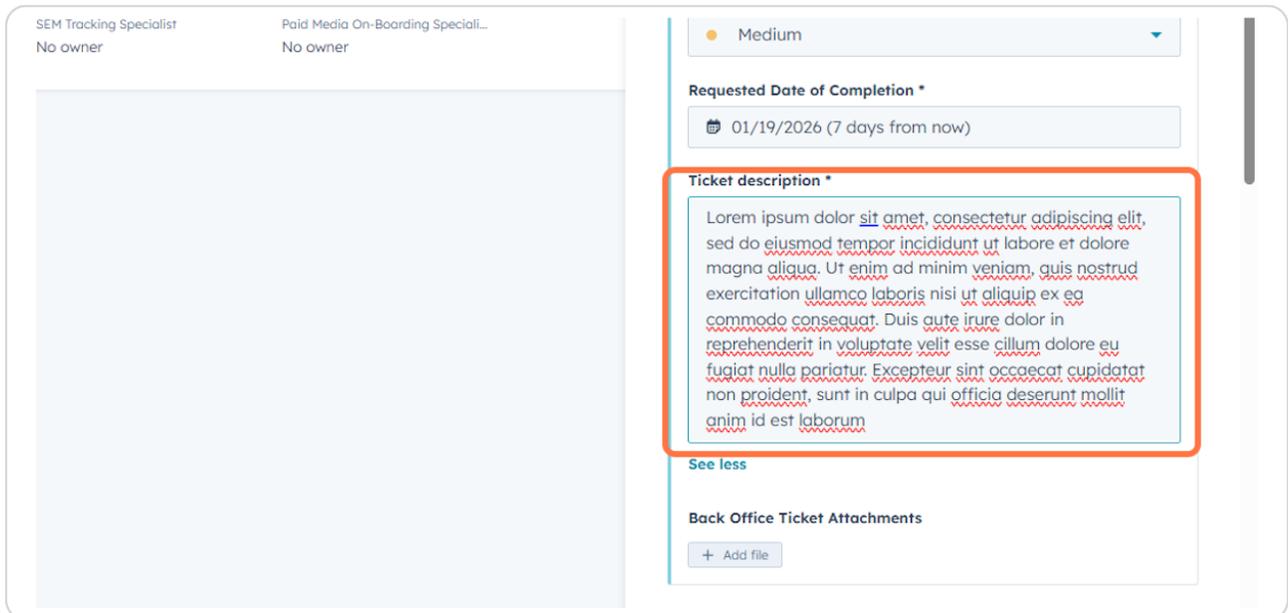

STEP 9

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

STEP 10

**If necessary, add any attachments to the Ticket with the "Add File" button below Ticket Description.**
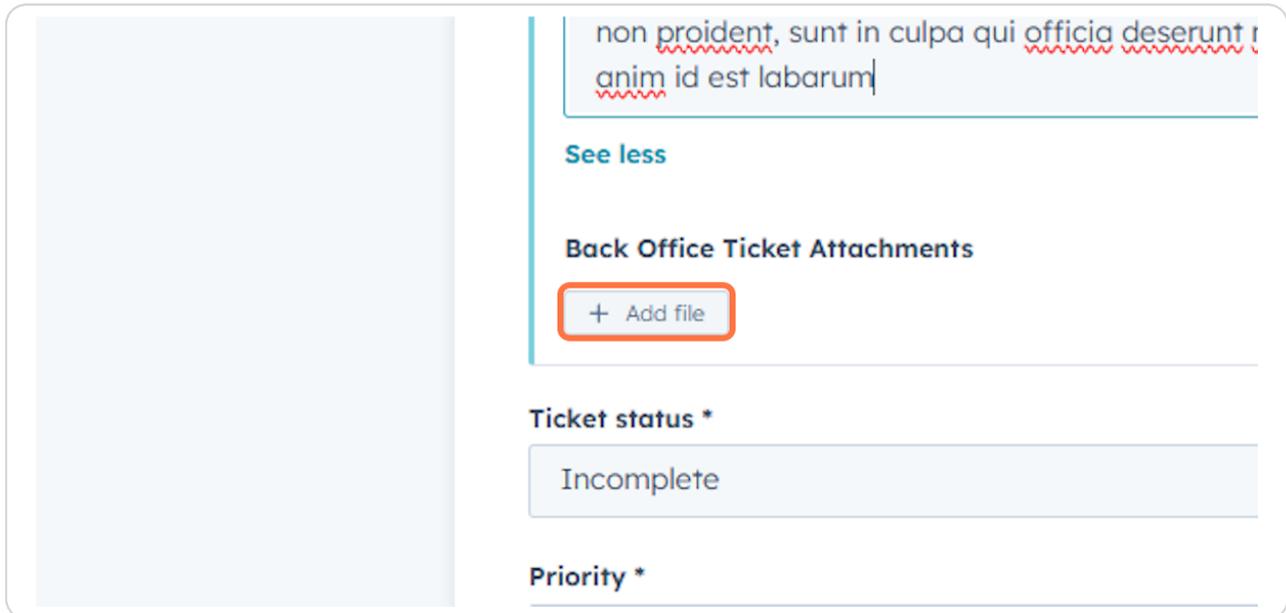
STEP 11

You can add multiple file attachments. Allow the file to complete uploading, select Add File again, and add a new attachment.
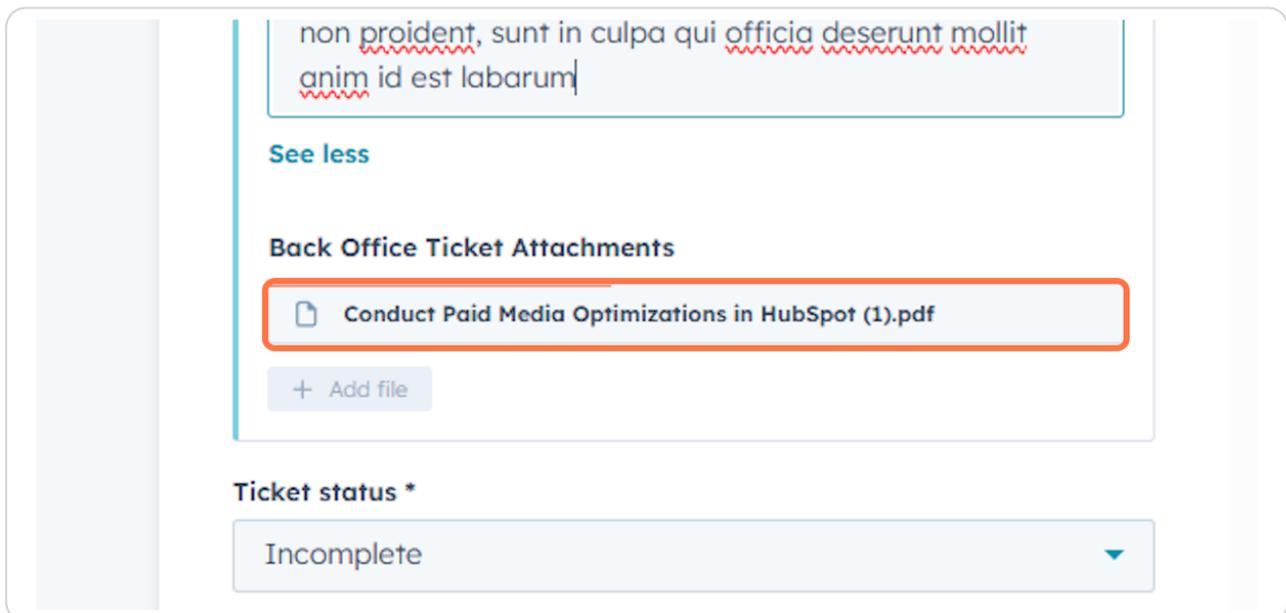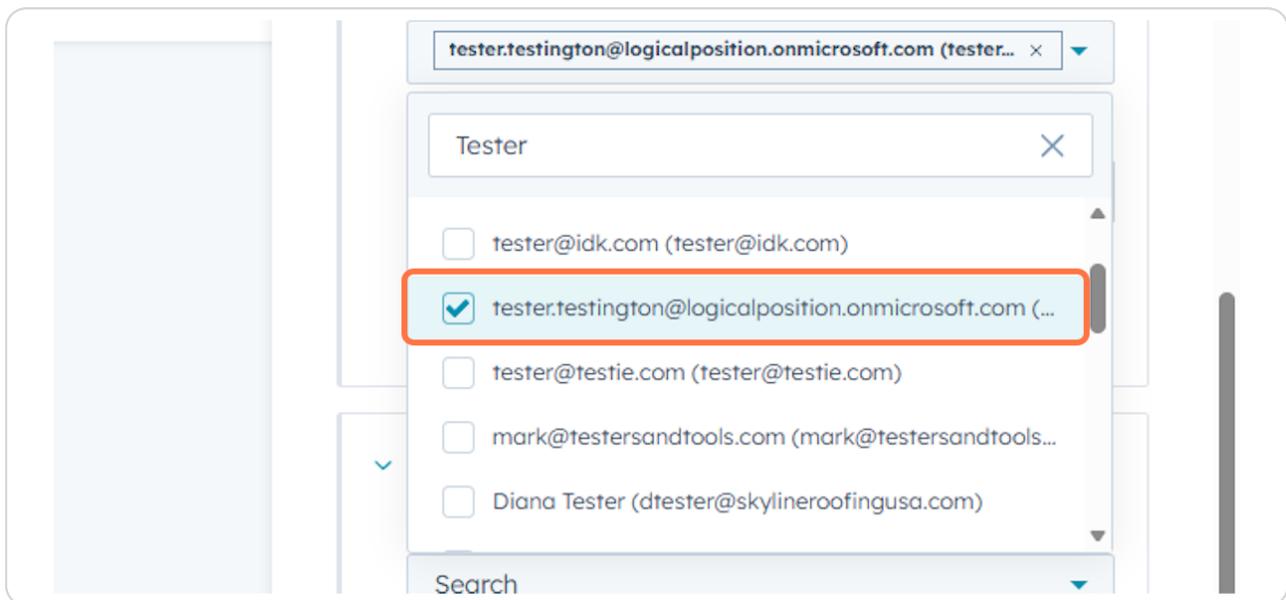
As the Submitter, you will be listed as the Ticket Owner. The Ticket Assignee will automatically be defaulted to the AM/Specialist assigned to the Service record you submit from.
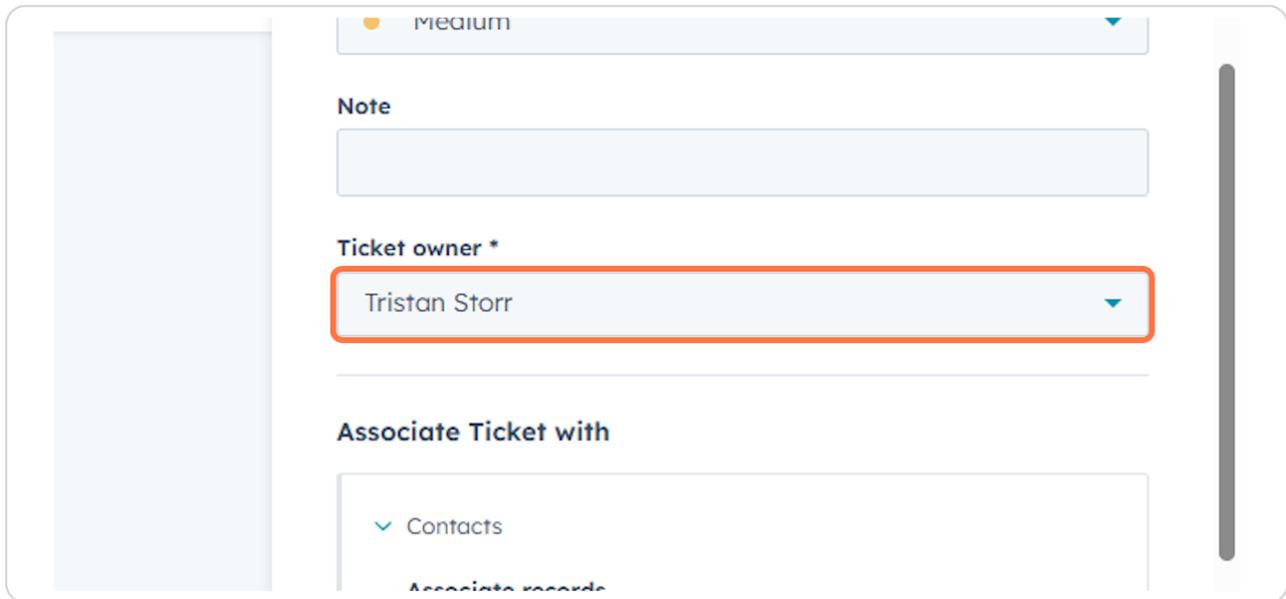
Check tester.testington@logicalposition.onmicrosoft.com (tester.testington@logicalposition.onmicrosoft.com)

Associate your request with a relevant company, if necessary.
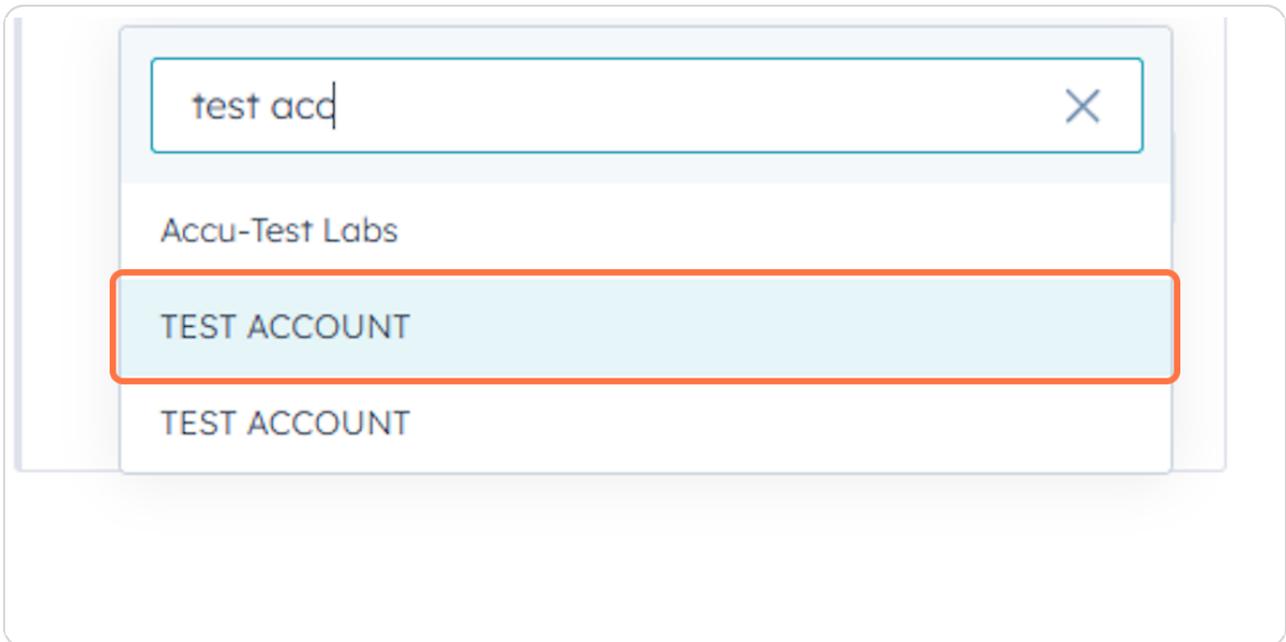
Click on Create to submit your ticket
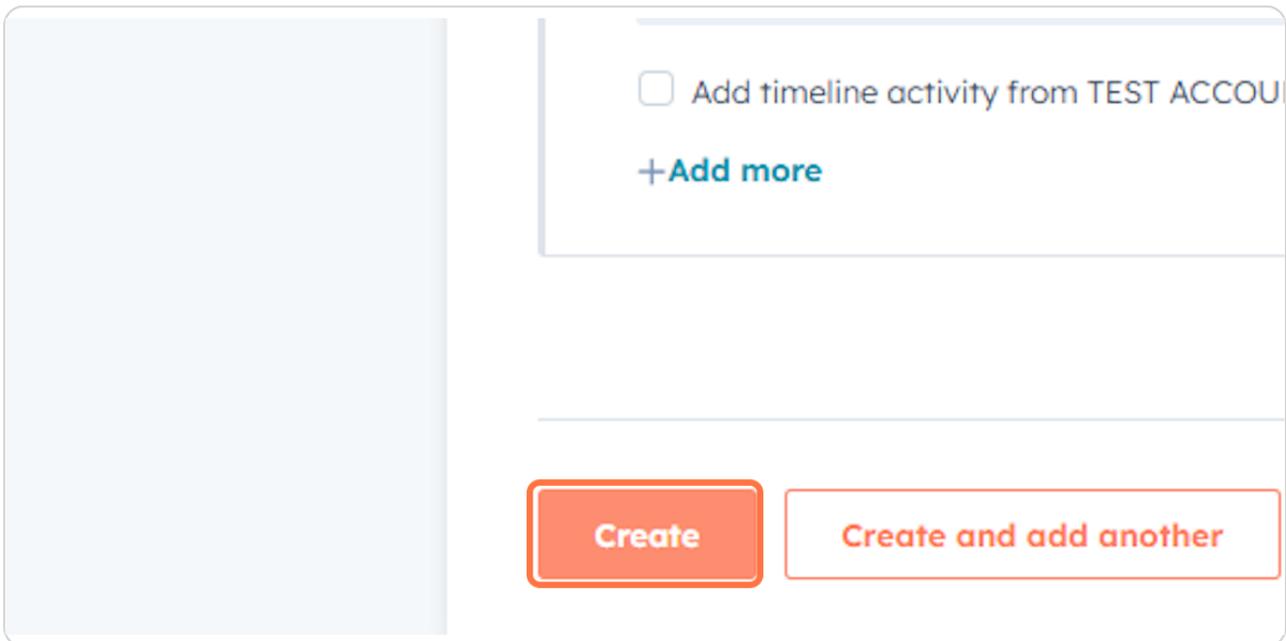
STEP 16

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.
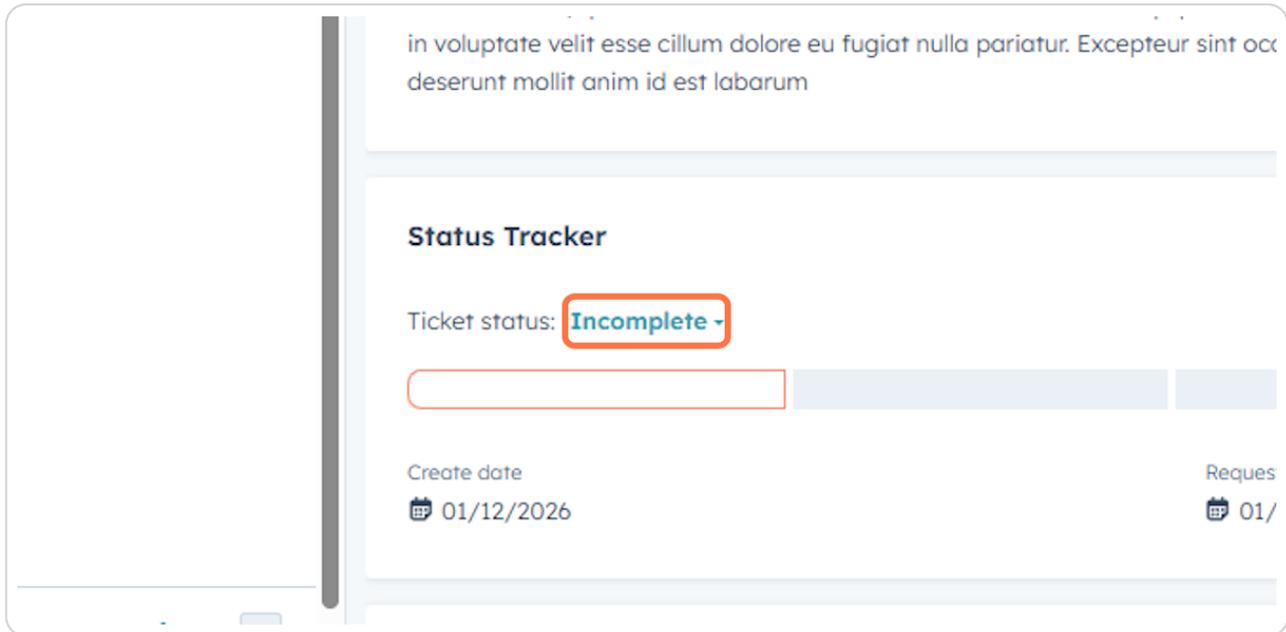

STEP 17

Below Request description you can see your Ticket Status tracker. All requests begin in an "Incomplete" status.
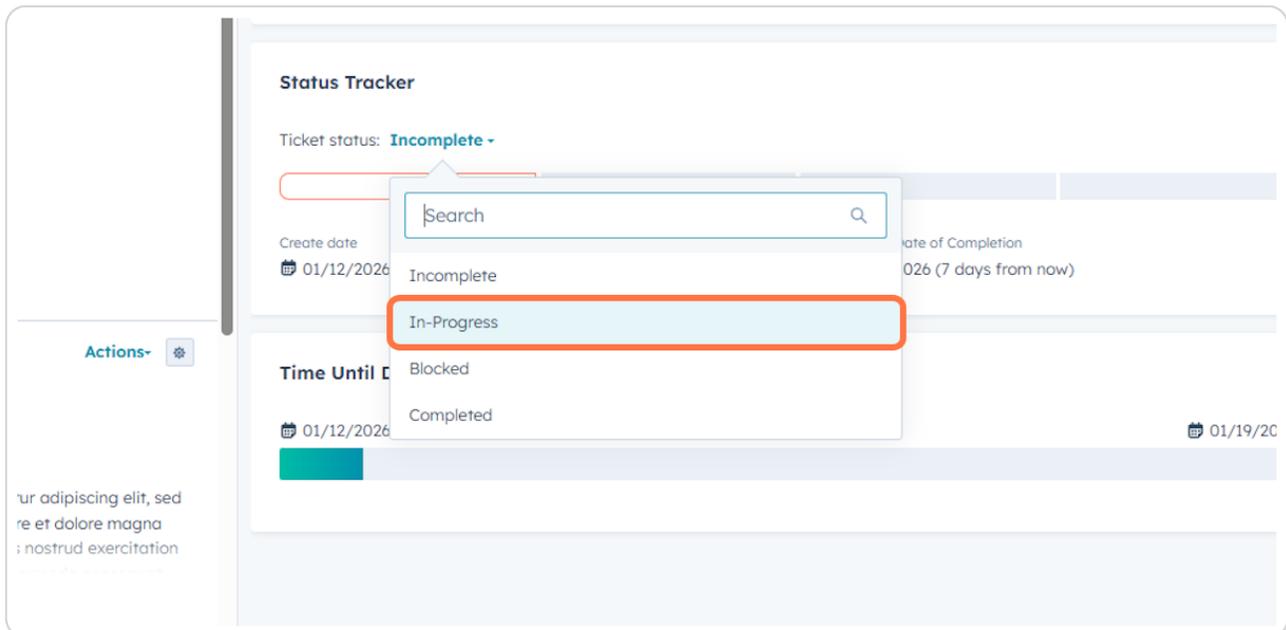
STEP 18

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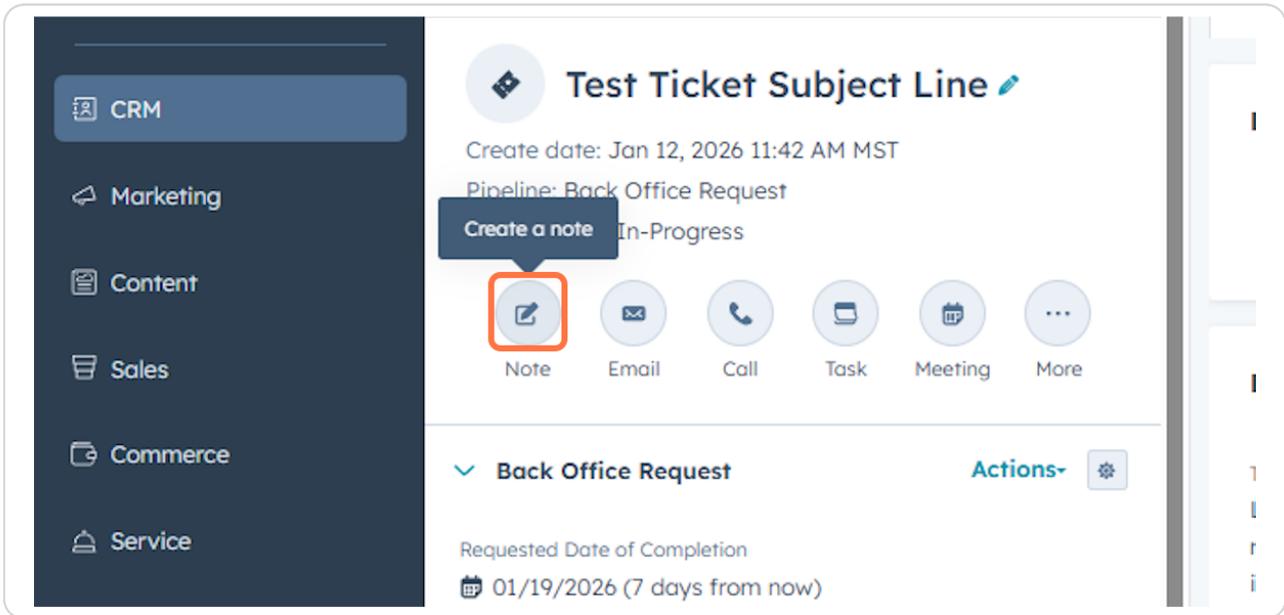

STEP 19

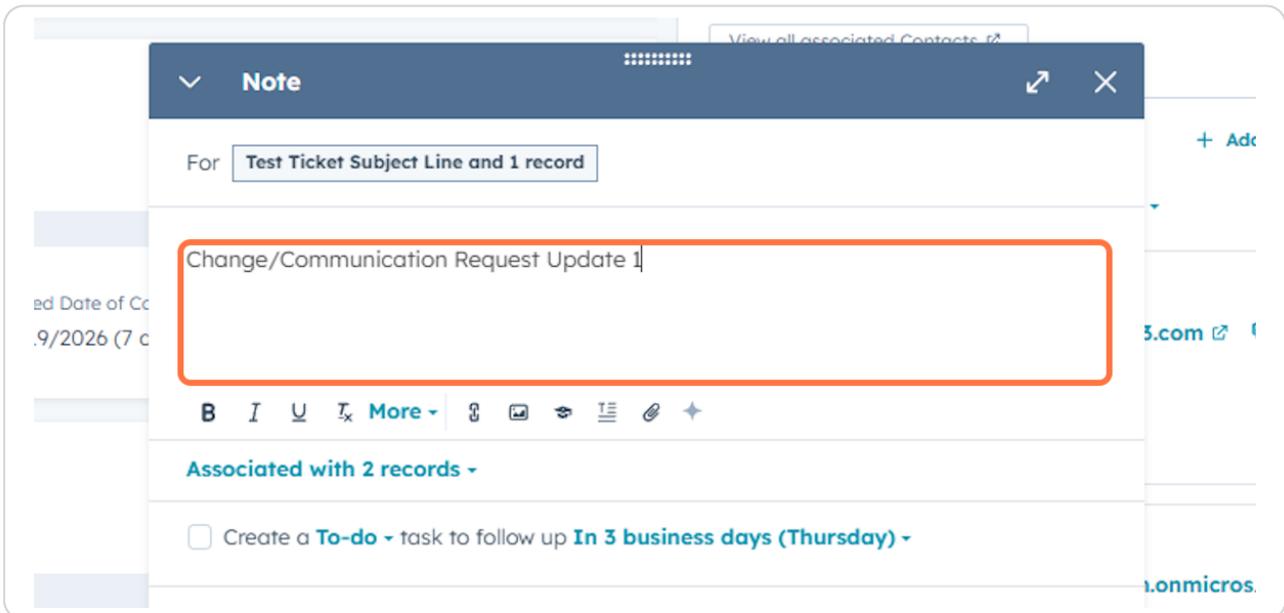**You can move to In-Progress, Blocked, or Completed**

STEP 20

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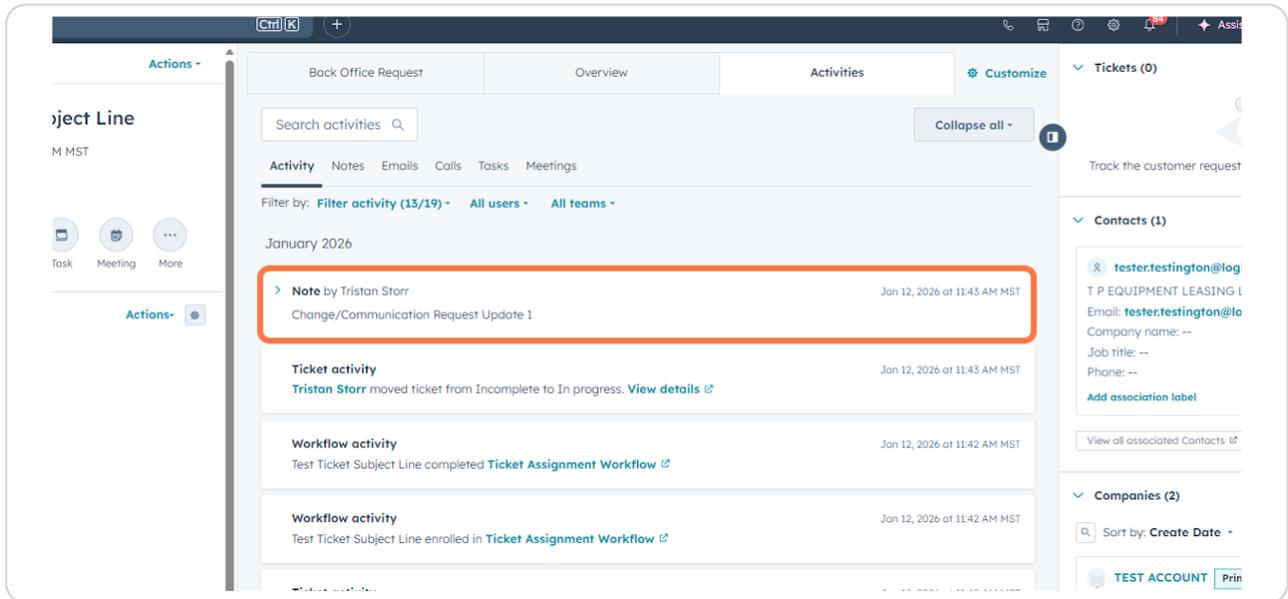

STEP 21

Write out your update. Use the @ symbol to tag users for enhanced visibility. You can also add attachments to individual note activities if needed.
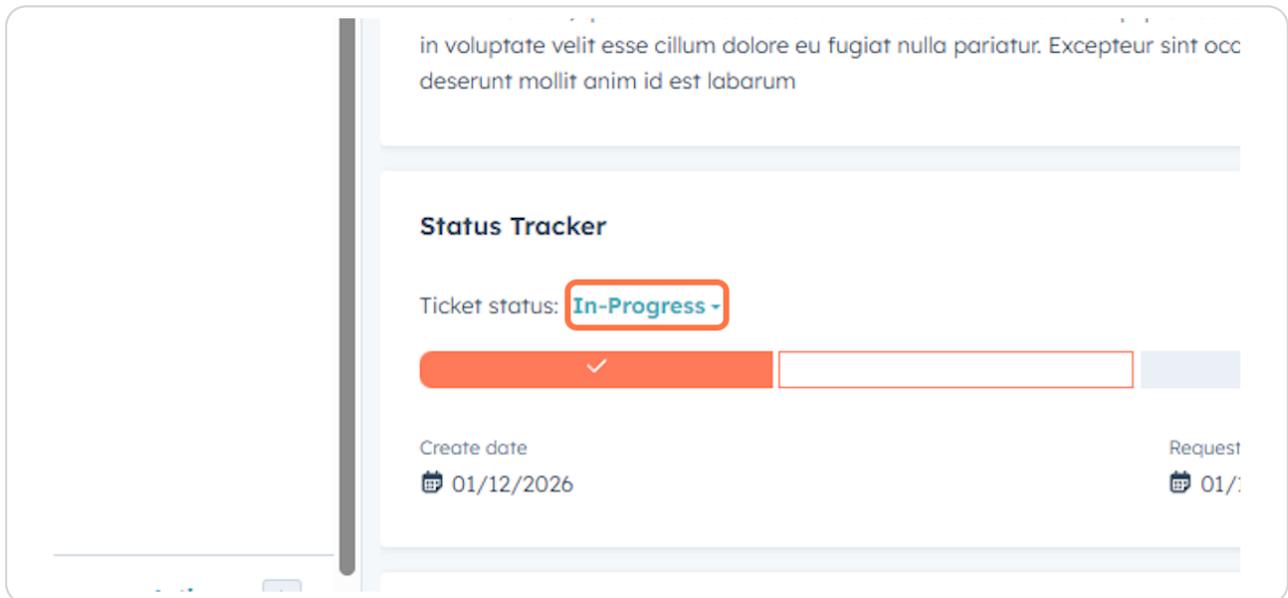
STEP 22

<u>**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.**</u>

STEP 23

As you leave notes on your progress, make sure that you are updating the status of the Ticket accordingly.
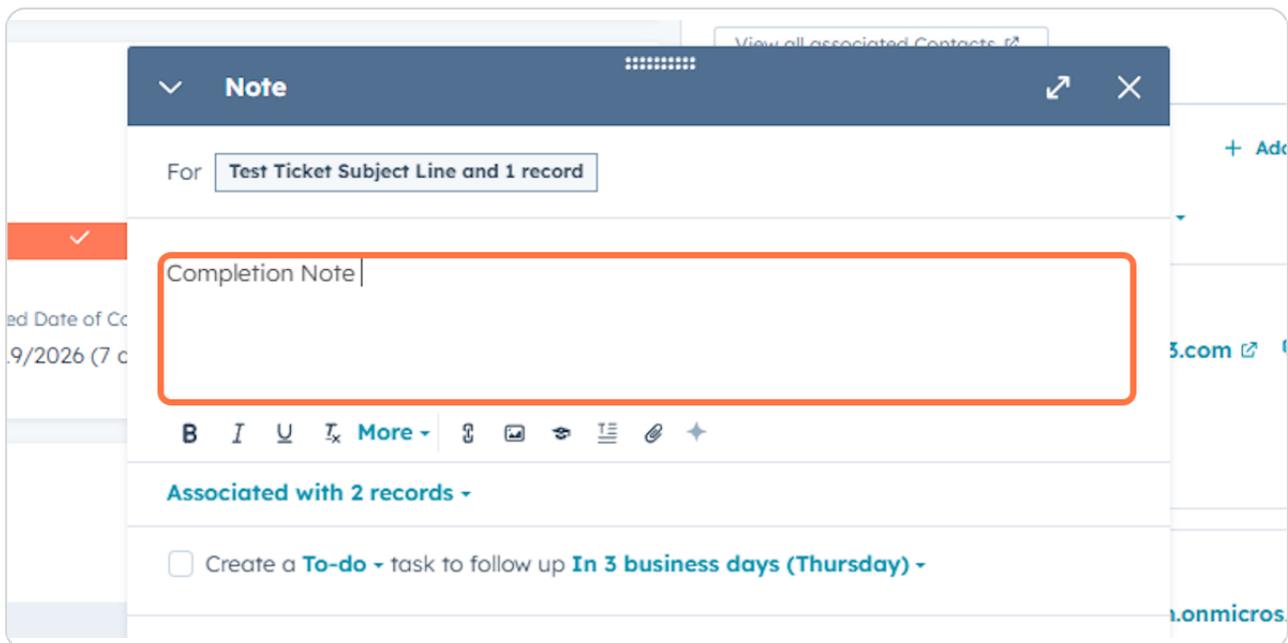
STEP 24

When the request has been fulfilled, move your Ticket Status to Completed.
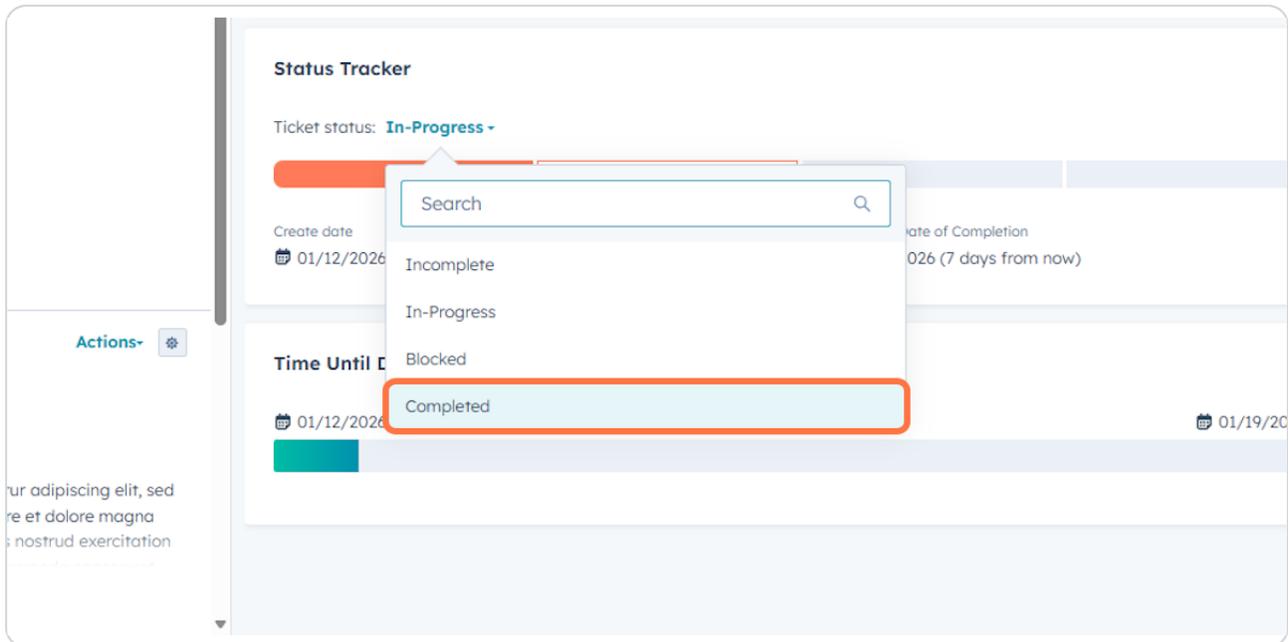
STEP 25

Create a new note to log your completion notes.

Completion note will show in the Activity feed

Tango

Never miss a step again. Visit Tango.ai