Using Tickets in HubSpot

Why should you use tickets in HubSpot?

Tickets

A Service Hub tool that tracks the status of customer issues and engagements and organizes related notes, documents, and customer conversations all in one place

When to create a ticket

- ✓ Extra research
- ✓ Loop in other folks
- ✓ Report on problem
- ✓ Record notes

Tickets is your way to organize and prioritize customer issues.

What are the different ways to create tickets in HubSpot?

Manual ticket creation

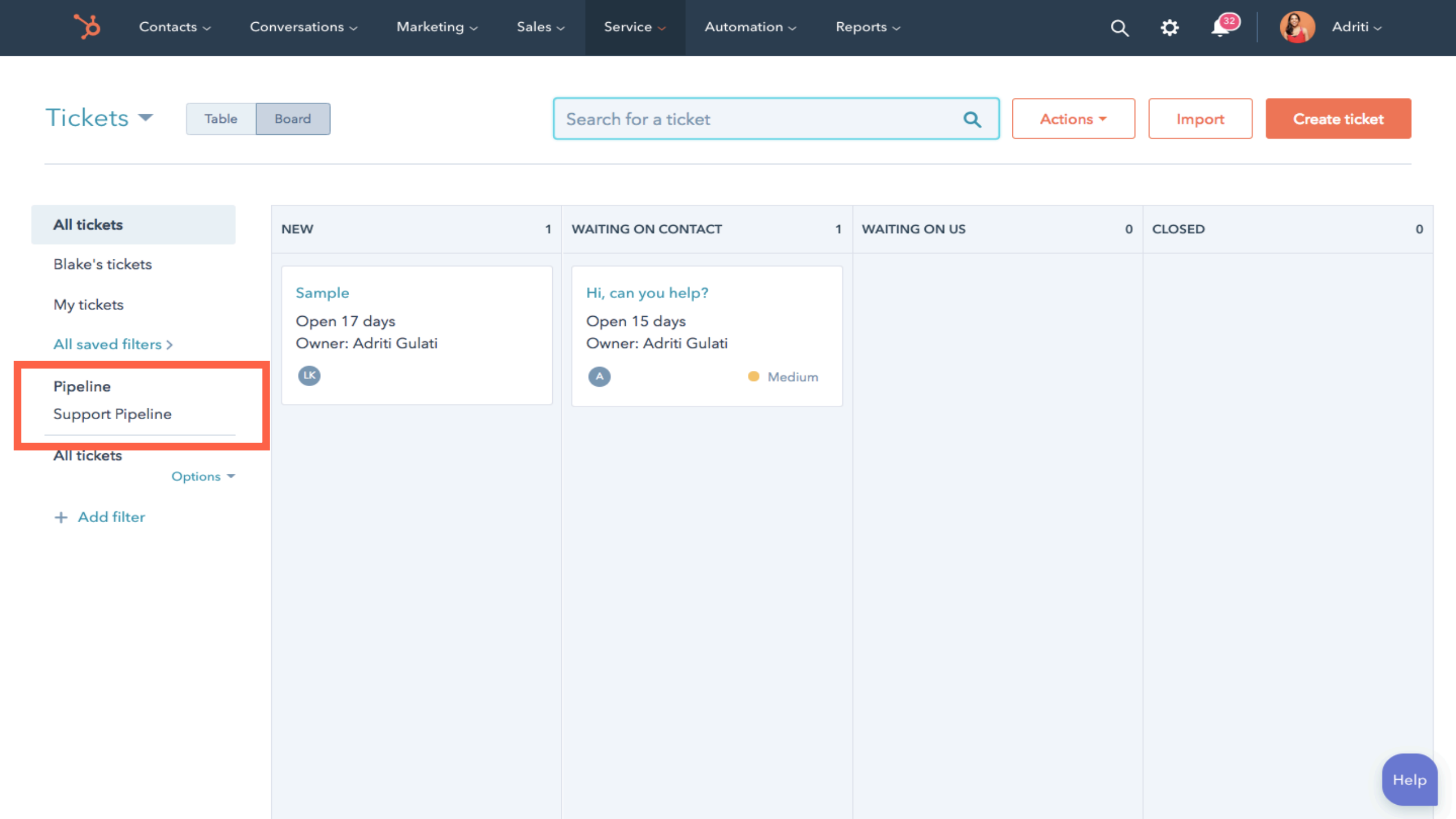
1. Contact record
2. Tickets dashboard
3. Conversations

How to create a ticket in HubSpot

How should you organize and prioritize tickets in HubSpot?

Organize and prioritize tickets

1. Pipelines
2. Stages
3. Filters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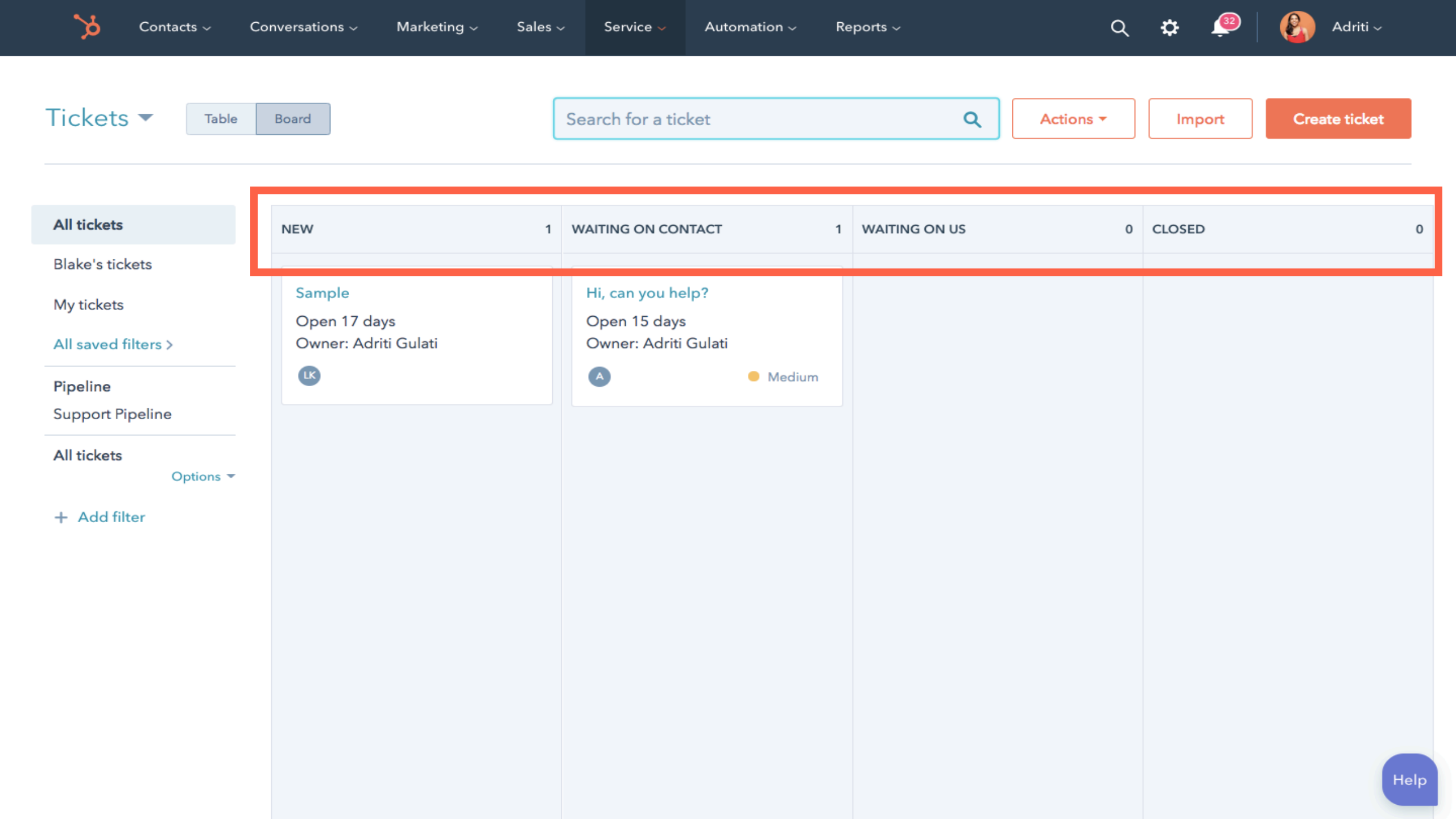
NEW 1
WAITING ON CONTACT 1
WAITING ON US 0
CLOSED 0
Sample
Open 17 days
Owner: Adriti Gulati
LK
Hi, can you help?
Open 15 days
Owner: Adriti Gulati
A
Medium
Help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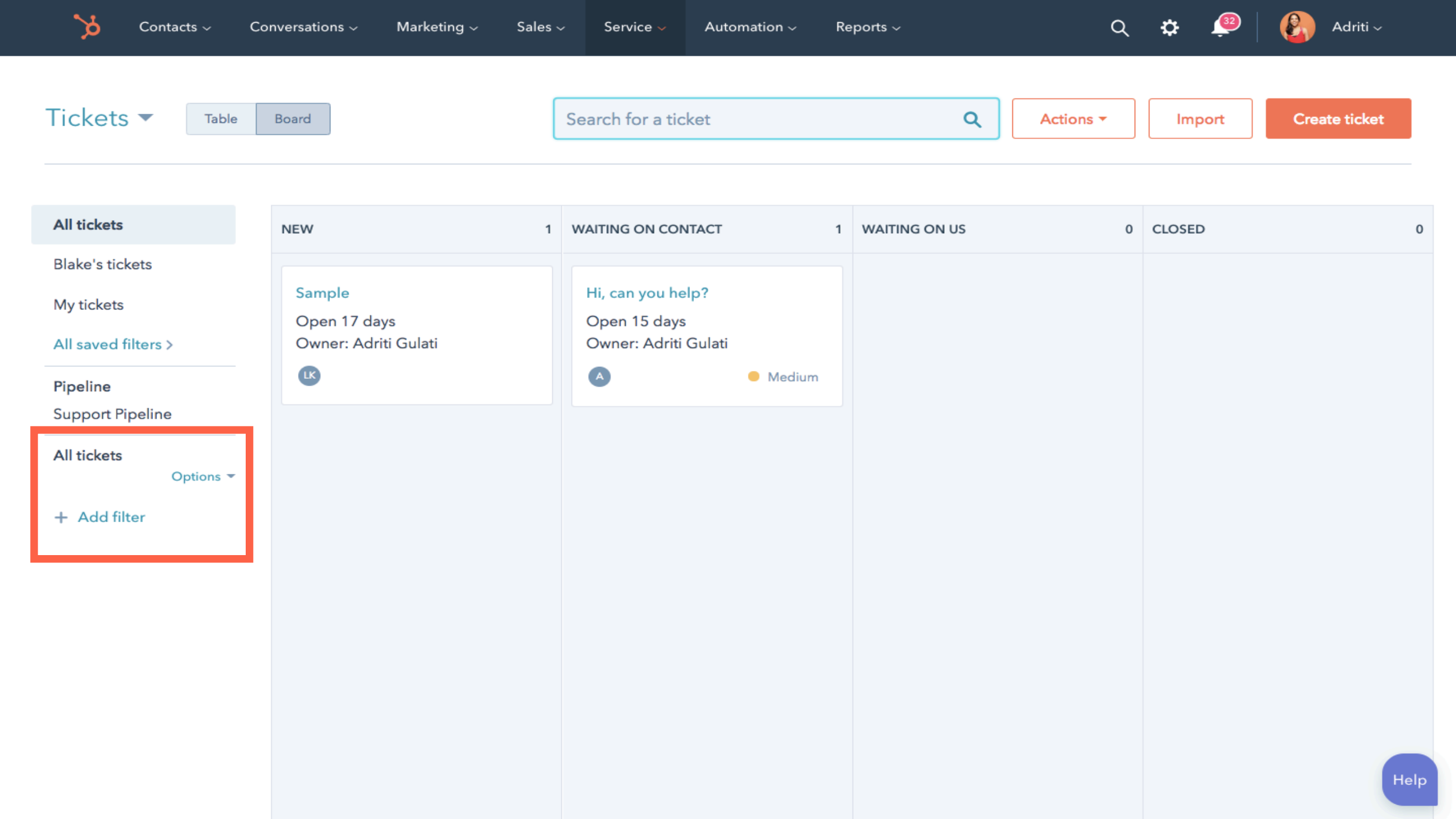
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Recommended filters

- ✓ *Ticket owner* is *Me*
- ✓ *Ticket priority* is *High*

Recommended filters

- ✓ *Category* is *X*
- ✓ *Stage* is *New* or *Waiting on us*

Recommended filters

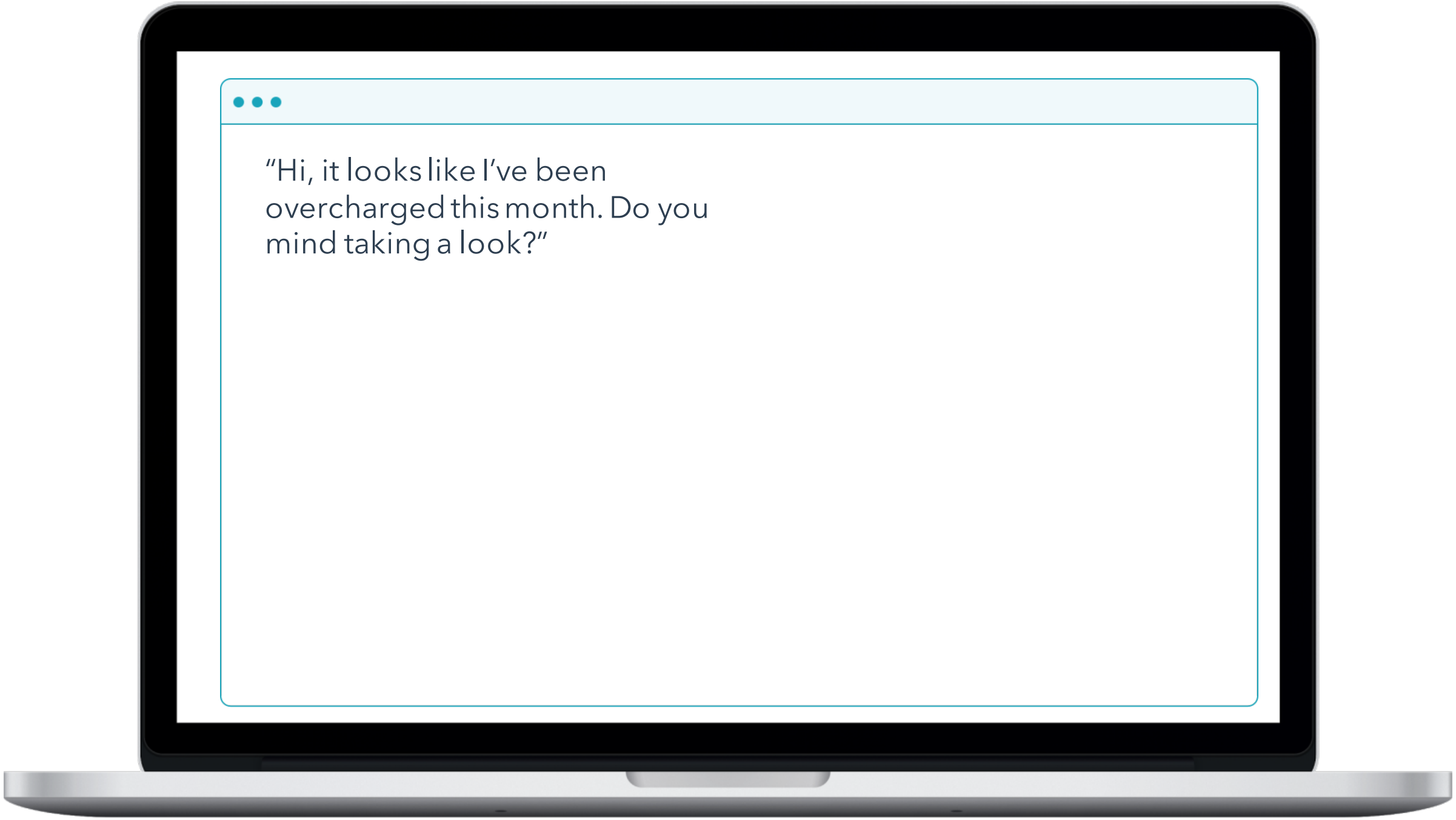
- ✓ *Last contacted date* is *Last week* or *before X date*

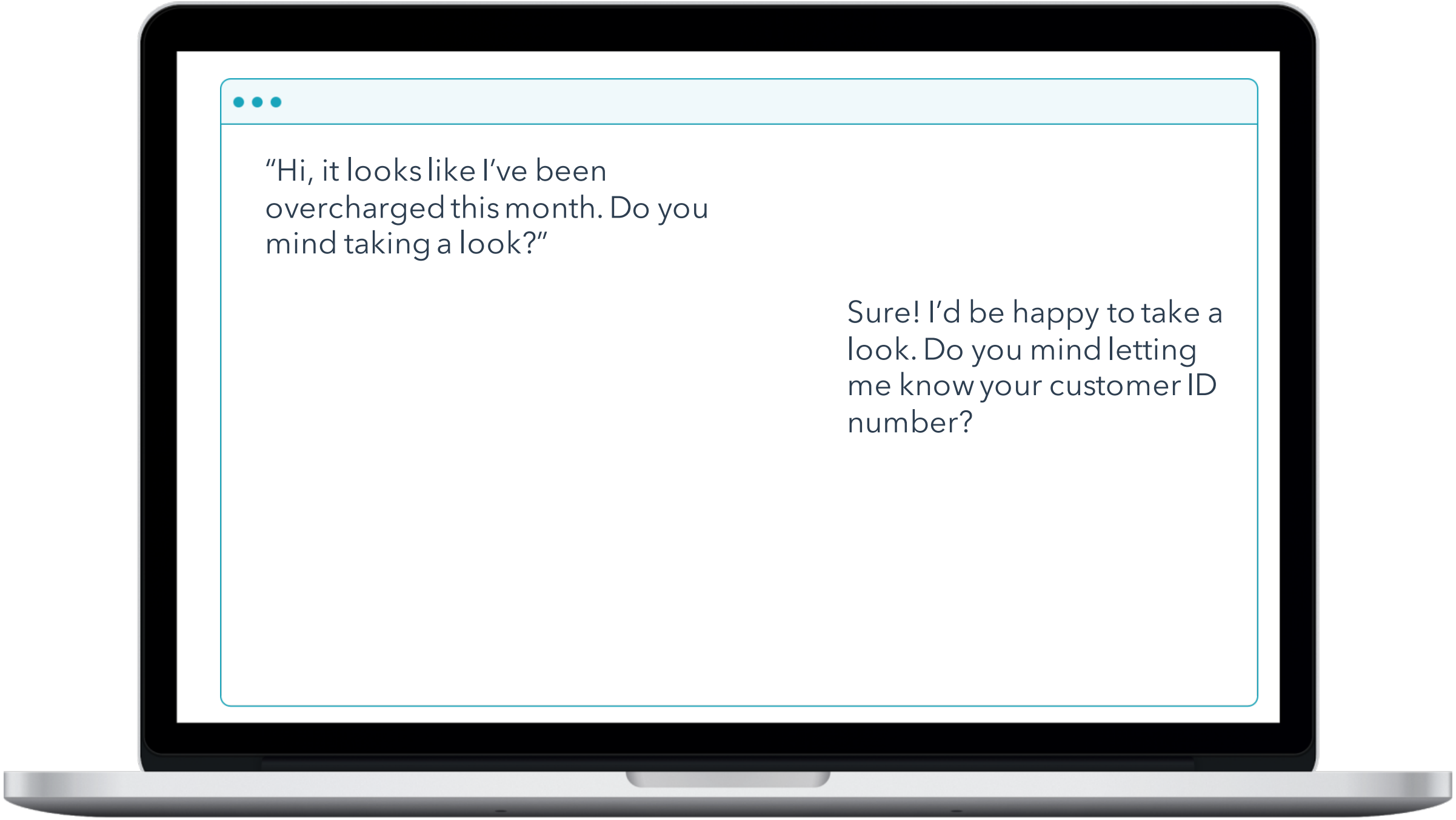
How to organize your tickets using pipelines, stages, and properties

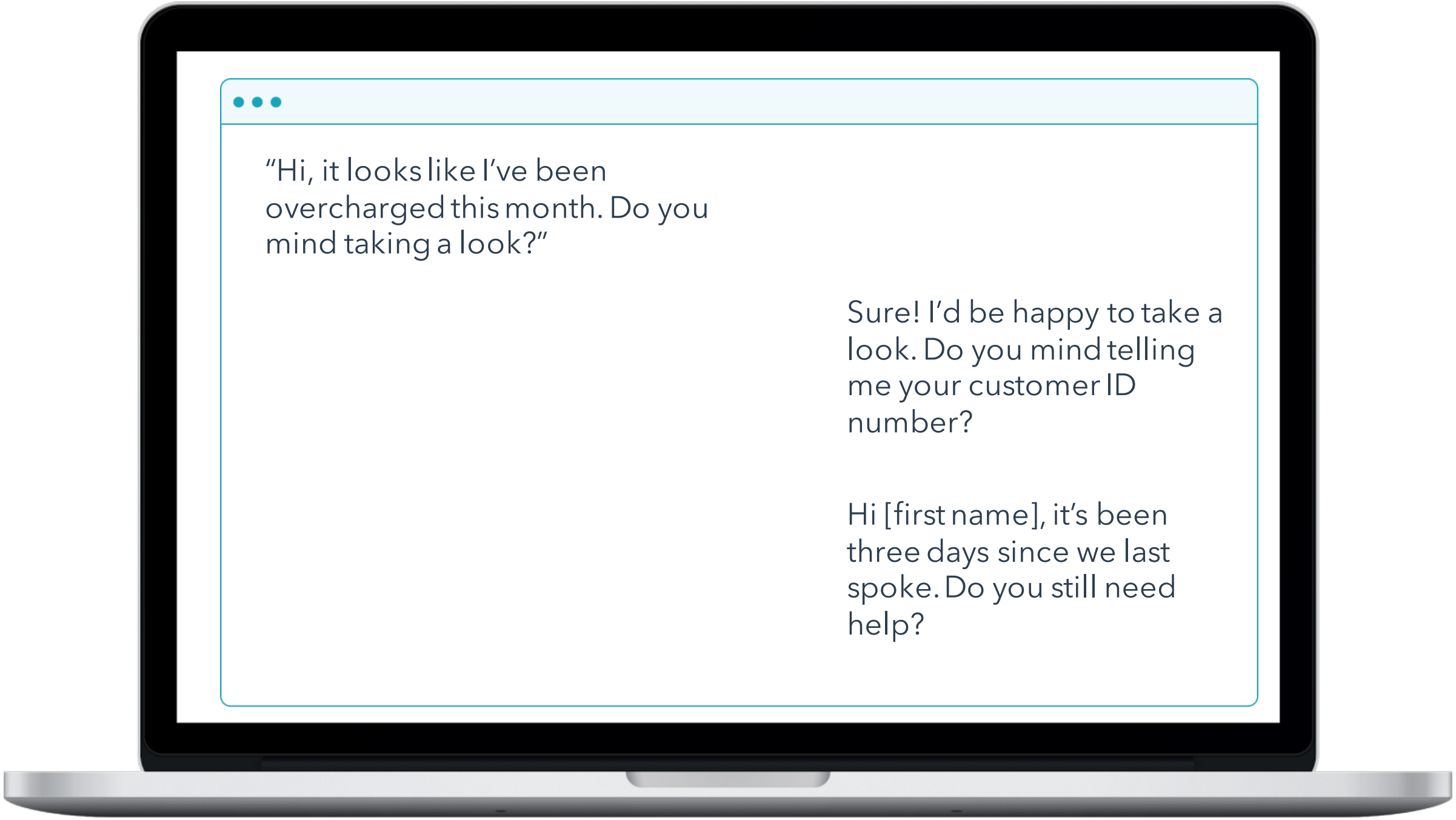
When should you use sequences to respond to tickets in HubSpot?

Sequences

A series of automated templates that are sent out at specified intervals


“Hi, it looks like I’ve been overcharged this month. Do you mind taking a look?”


“Hi, it looks like I’ve been overcharged this month. Do you mind taking a look?”
Sure! I’d be happy to take a look. Do you mind letting me know your customer ID number?


"Hi, it looks like I've been overcharged this month. Do you mind taking a look?"
Sure! I'd be happy to take a look. Do you mind telling me your customer ID number?
Hi [first name], it's been three days since we last spoke. Do you still need help?

Responding to tickets in HubSpot using sequences

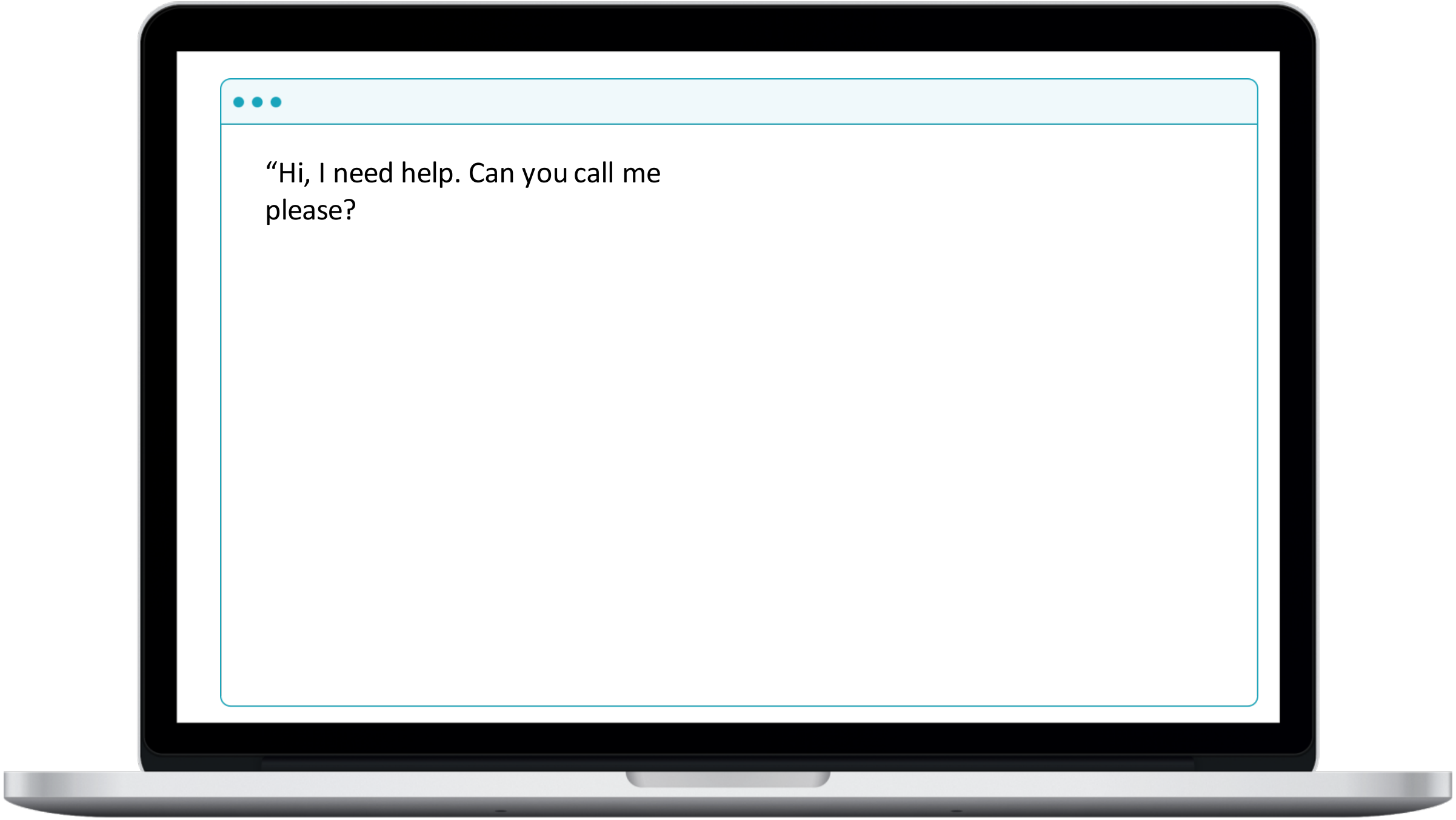
When should you use the calling tool to respond to tickets in HubSpot?

Calling

1. Record your calls.
2. Take notes on the call.
3. Send follow-up emails from the same screen.

Responding to tickets in HubSpot using the calling tool

When should you use the meetings tool to respond to tickets in HubSpot?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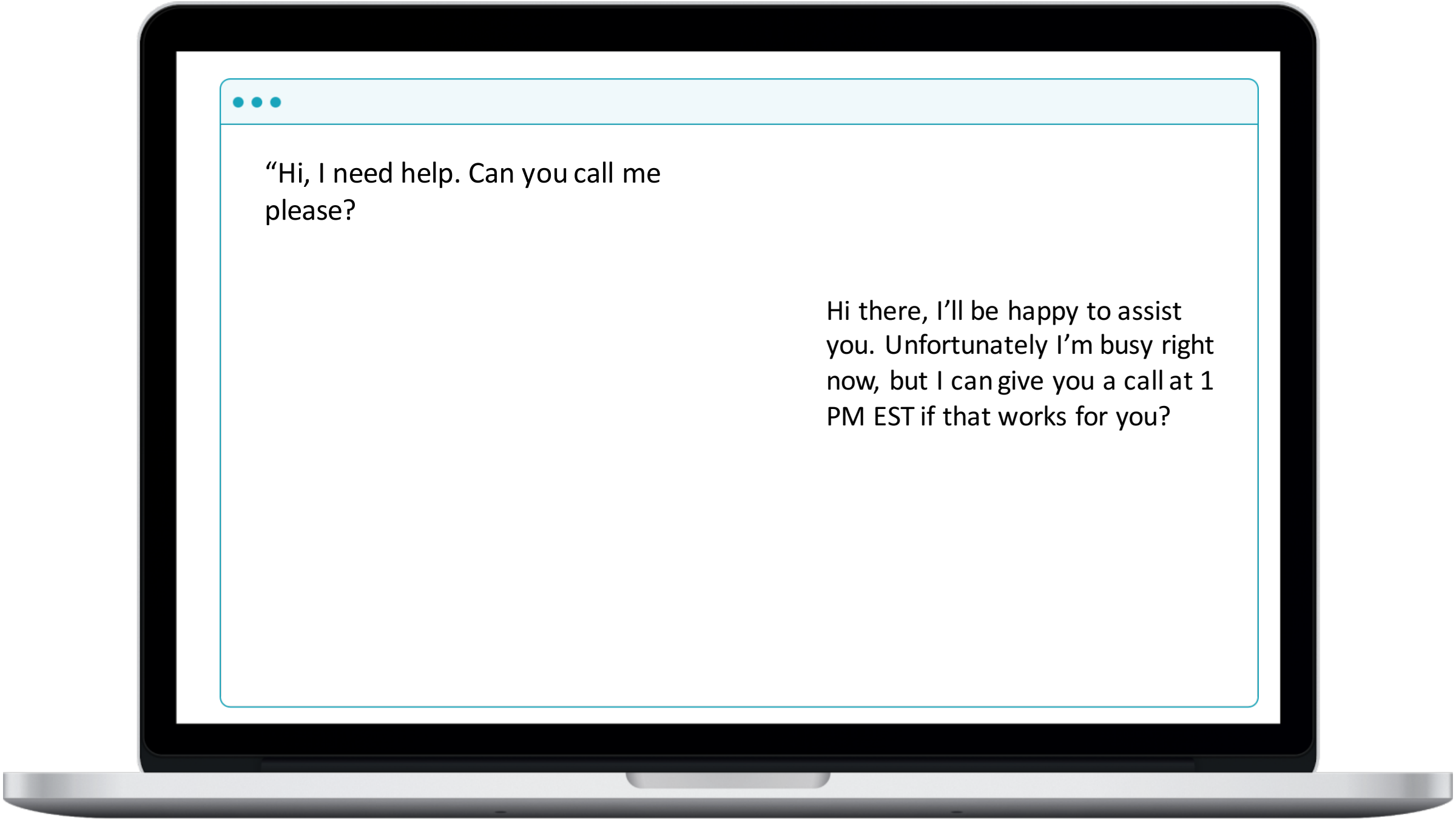
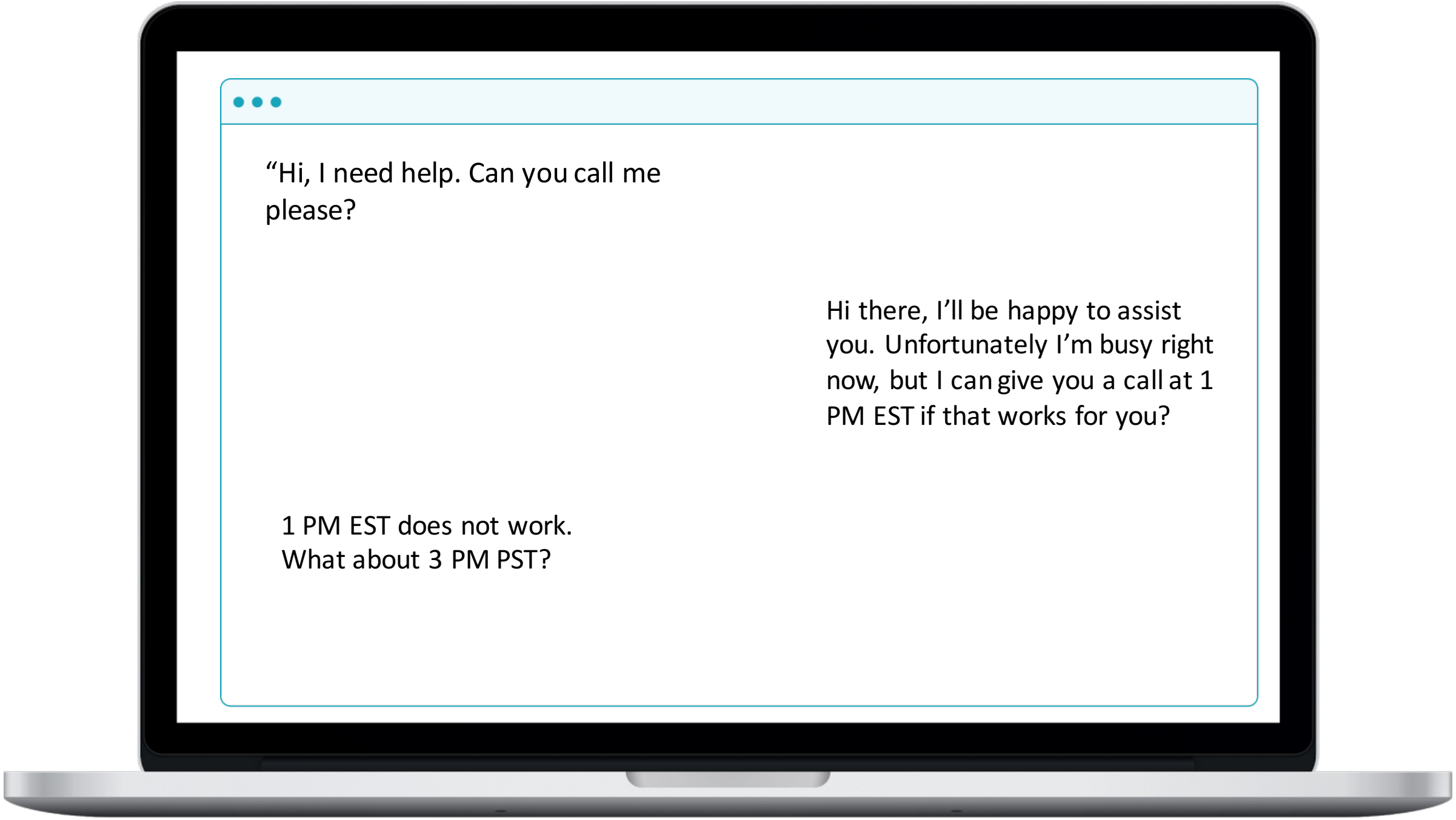
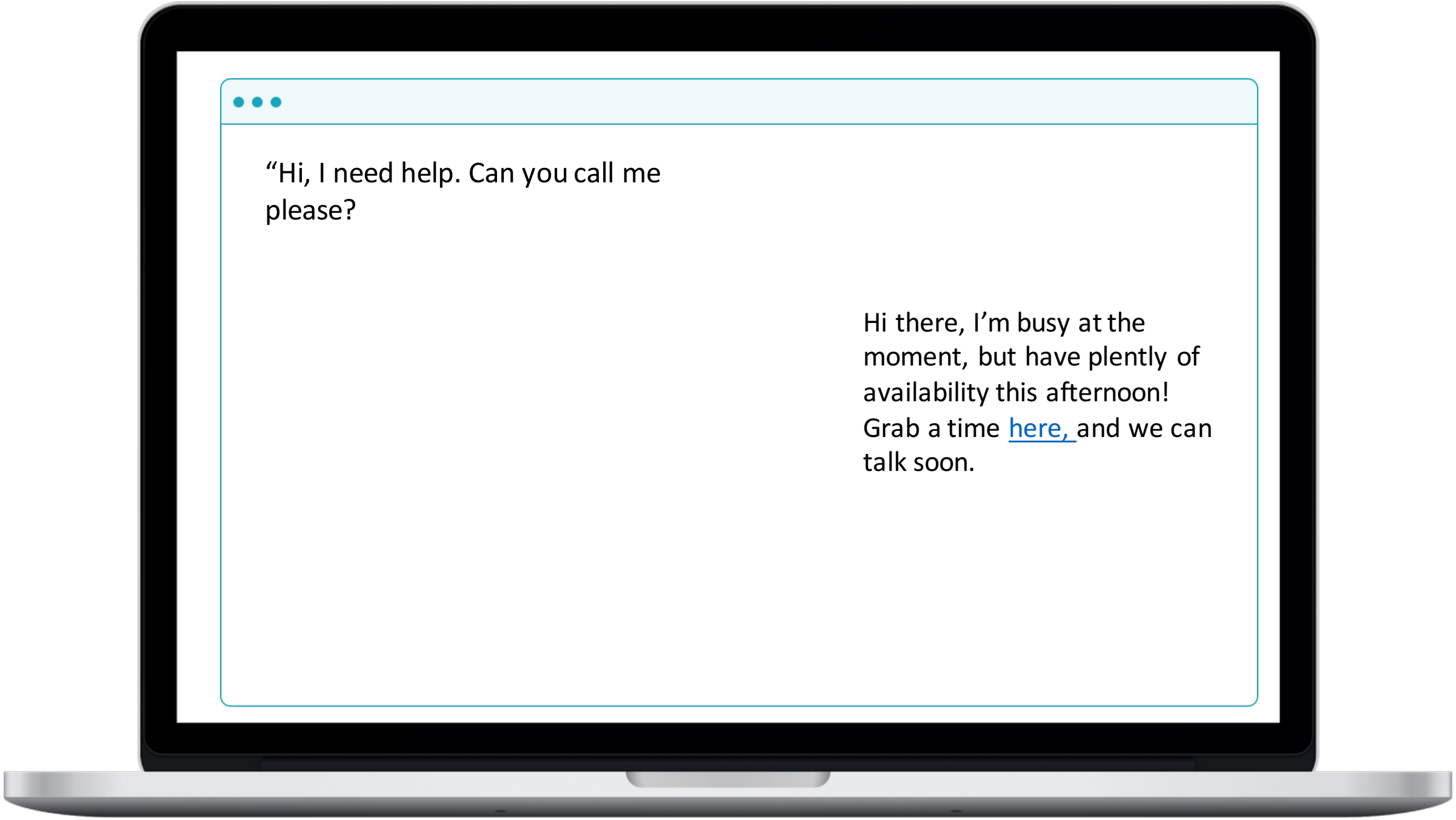

“Hi, I need help. Can you call me please?
Hi there, I’ll be happy to assist you. Unfortunately I’m busy right now, but I can give you a call at 1 PM EST if that works for you?


“Hi, I need help. Can you call me please?
Hi there, I’ll be happy to assist you. Unfortunately I’m busy right now, but I can give you a call at 1 PM EST if that works for you?
1 PM EST does not work. What about 3 PM PST?


“Hi, I need help. Can you call me please?
Hi there, I’m busy at the moment, but have plently of availability this afternoon! Grab a time here, and we can talk soon.

Responding to tickets in HubSpot using the meetings tool