Bongadu:

Detailed Description and Steps for Supporting a New Client in HubSpot

1. Create a HubSpot Form for Ticket Submission

Purpose: To allow the client to submit support tickets through a form on their website or a shared link.

Steps:

- Log into your HubSpot account and navigate to Marketing > Forms.
- Click Create Form and choose a Blank Form or start from a Support Request Template.
- Add required fields like:
  - Name
  - Email
  - Issue Description
  - Priority Level (Low, Medium, High)
  - Additional file upload (if needed for troubleshooting)
- Customize the form styling and adjust field properties (mark mandatory fields).
- Set up Form Automation to send notifications or auto-assign the ticket to the appropriate team member.
- Save and publish the form, then embed the form link on the client's website or provide them with a shareable URL.

2. Create a HubSpot Pipeline for Ticket Stages

Purpose: To track and manage client tickets by setting different stages of ticket resolution.

Steps:

- Navigate to Settings > Tickets and go to Pipeline Settings.
- Click Create New Pipeline and name it (e.g., "Client Support Tickets").
- Define the Stages of your ticket process, such as:
  - New
  - In Progress
  - Waiting for Customer
  - Escalated
  - Resolved
  - Closed
- For each stage, set Stage Properties that must be completed before advancing the ticket (e.g., internal comments, resolution details).
- Enable Automation to move tickets between stages based on certain triggers (e.g., customer replies, assigned team members).

3. Create an Inbox for Client Communication

Purpose: To centralize communication between your support team and the client in a shared inbox.

Steps:

- Navigate to Settings > Inbox, then click Create Inbox.
- Name the inbox (e.g., "Client Support Inbox").
- Connect a Support Email Address (e.g., support@clientdomain.com) or set up a dedicated support email for the client.
- Choose the team members who should have access to this inbox.

- Set up Auto-Response or Assignment Rules to ensure timely responses to incoming tickets.

- Save the inbox and test the connection by sending a sample email to confirm everything is set up correctly.

4. Create a Customer Portal for Ticket Tracking

Purpose: To provide the client with a self-service portal where they can track the status of their tickets.

Steps:

- Navigate to Content > Customer Portal.
- Click Create New Portal and select the client’s name.
- Set up Portal Permissions to ensure only the client and your support team can access them.
- Customize the portal with the client’s branding (logo, color scheme) if needed.
- Link the ticket pipeline so that the client can see their tickets' status, updates, and resolutions in real time.
- Share the Portal Access URL with the client.

5. Link Client Inbox to Pipeline

Purpose: To ensure emails from the client’s inbox flow directly into the pipeline for tracking and action.

Steps:

- Navigate to Settings > Inbox, select the client inbox, and go to Settings.
- Under Routing Rules, set automation to create a Ticket from every email sent to the inbox.

- Set the pipeline to automatically add tickets from the inbox to the predefined Client Support Pipeline created earlier.

- Set up any custom workflows to trigger alerts, assign tickets, or move tickets between stages based on inbox activity.

6. Link the Inbox to the Form

Purpose: To automatically generate a support ticket when the client submits a form.

Steps:

- Go back to the Form created earlier and open Form Settings.

- Under Actions, set the form to create a Ticket for every submission and route it to the client inbox.

- In the form’s workflow, ensure the submitted ticket is automatically placed in the Client Support Pipeline.

- Test the setup by submitting the form and confirming that the submission generates a ticket in both the inbox and pipeline.

7.Testing and Final Setup:

- After everything is set up, do a complete test run by submitting a ticket through the form, verifying it appears in the inbox, and ensuring the ticket follows the stages in the pipeline.

- Ensure communication works from the inbox and that updates are reflected in the customer portal.