

How to Create a Support Ticket in HubSpot

1 Click "Service"

The screenshot shows the HubSpot Sales Manager Dashboard. A dark purple sidebar on the left contains navigation icons. The 'Service' icon is highlighted with an orange circle, and a dropdown menu is open, listing the following options: Service, Help Desk, Customer Success, Customer Agent, Chatflows, Knowledge Base, Customer Portal, Feedback Surveys, and Service Analytics. The main dashboard area is titled 'Sales Manager Dashboard' and includes several charts and filters. The top right corner has 'Manage dashboards', 'Create dashboard', 'Actions', and 'Share' buttons. The top left has '+ Quick filters' and 'Advanced filters' options. The top right of the dashboard area says 'Assigned: Eve'. The dashboard contains four main sections: 1. 'Deal closed totals vs. goal' (line chart) showing '(Sum) Closed amount in company currency' and 'Revenue goal' over the last 30 days. 2. 'Activity leaderboard by rep with type breakdown' (horizontal bar chart) showing activity for Jason Berry, JP McKinley, Jeff Portell, Sara Howard, and Austin Crain, categorized by Call, Email sent to contact, and Meeting. 3. 'Deal revenue forecast by stages' (horizontal bar chart) showing revenue forecast for the last 30 days, totaling \$2,219,311. 4. 'Deal revenue forecast by stages' (horizontal bar chart) showing revenue forecast for the last 30 days, totaling \$2,219,311.

2 Click "Help Desk"

The screenshot shows the Sales Manager Dashboard with a sidebar menu on the left. The 'Service' menu is open, and the 'Help Desk' option is circled in orange. The dashboard contains several charts: 'Deal closed totals vs. goal', 'Activity leaderboard by rep with type breakdown', 'Deal revenue forecast by stages', and 'Deal revenue by rep'. The 'Deal revenue forecast by stages' chart shows a total of \$2,219,311.

3 Click "Create Ticket" button.

The screenshot shows the HubSpot Help Desk interface. The 'Create Ticket' button is circled in orange. The interface displays a list of 34 tickets with columns for Ticket ID, Ticket owner, Ticket status, and Ticket name. The 'All Open' filter is selected, showing 34 tickets. The 'Create Ticket' button is located at the top of the ticket list.

Ticket ID	Ticket owner	Ticket status	Ticket name
40597980749	No owner	New (Client Support)	Enclosure picking up additional RFID tags
40504864555	No owner	New (Client Support)	Manufacturer not matching item ND
40497644667	No owner	New (Client Support)	FW: New Voice Message from Client Support De...
40495180895	Amber Schauer	New (Client Support)	Fw: New Voice Message from Client Support Depar...
40492689075	No owner	New (Client Support)	Approval Request Remifentanil 1000 mcg Wast...
40486570741	No owner	New (Client Support)	Case #130850 Latches
40486218065	No owner	New (Client Support)	Invoice 1311242358 due from Florida Masterter...
40299889202	No owner	New (Client Support)	Microsoft 365 security: You have messages in quara...
40290670109	No owner	New (Client Support)	Server access via Secure Link
40244505770	No owner	New (Client Support)	Flush user
40163260588	Amber Schauer	In Progress (Client Su...	#130995 HL7 error when running case schedule re...
40147272743	Logan Scott	Escalated (Client Sup...	test
40144157617	Logan Scott	New (Client Support)	Case #130995 HL7 error when running report

4 Click the "Ticket name" field.

The screenshot shows the HubSpot Help Desk interface. On the left is a navigation sidebar with options like Summary, Analyze, Coaching, and various filters. The main area displays a list of 34 tickets under the 'All Open' view. The table has columns for Ticket ID, Ticket owner, Pipeline, Ticket status, and Assigned Team. On the right, a 'Create Ticket' form is open, with an orange circle highlighting the 'Ticket name' input field.

Ticket ID	Ticket owner	Pipeline	Ticket status	Assigned Team
40597980749	No owner		New (Client Sup	
40504864553	No owner		New (Client Sup	
40497644667	No owner		New (Client Sup	
40495180895	Amber Schauer		New (Client Sup	
40492689075	No owner		New (Client Sup	
40486370741	No owner		New (Client Sup	
40486218065	No owner		New (Client Sup	
40299889202	No owner		New (Client Sup	
40290670109	No owner		New (Client Sup	
40244505770	No owner		New (Client Sup	
40163260588	Amber Schauer		In Progress (Cli	
40147272743	Logan Scott		Escalated (Clien	
40144157617	Logan Scott		New (Client Sup	

5 Click "Ticket status" dropdown

This is a close-up view of the 'Create Ticket' form and the ticket list. The 'Ticket status' dropdown menu in the form is highlighted with an orange circle. The ticket list on the left shows the 'Ticket status' column for each entry.

ID	Ticket owner	Ticket status
980749	No owner	New (Client Sup
864553	No owner	New (Client Sup
644667	No owner	New (Client Sup
180895	Amber Schauer	New (Client Sup
689075	No owner	New (Client Sup
370741	No owner	New (Client Sup
218065	No owner	New (Client Sup
889202	No owner	New (Client Sup
670109	No owner	New (Client Sup

6

Choose from; New, In Progress, Escalated, On Hold - Client, On Hold - Internal, Resolved or Closed

The screenshot shows a ticket management interface. On the left, there is a list of 34 tickets under the heading "All Open (34)". The list has columns for "Ticket ID", "Ticket owner", and "Ticket status". The right side of the interface is a form for creating or editing a ticket. The form includes fields for "Ticket name", "Pipeline" (set to "Client Support"), and "Ticket status". The "Ticket status" dropdown menu is open, showing options: "New", "On Hold - Internal" (highlighted with an orange circle), "Resolved", and "Closed". Below the dropdown is a search bar and a "Category" dropdown.

Ticket ID	Ticket owner	Ticket status
40597980749	No owner	New (Client Sup
40504864553	No owner	New (Client Sup
40497644667	No owner	New (Client Sup
40495180895	Amber Schauer	New (Client Sup
40492689075	No owner	New (Client Sup
40486370741	No owner	New (Client Sup
40486218065	No owner	New (Client Sup
40299889202	No owner	New (Client Sup
40290670109	No owner	New (Client Sup
40244505770	No owner	New (Client Sup
40163260588	Amber Schauer	In Progress (Cli

7

Click "Priority" dropdown

This screenshot shows the same ticket management interface as above, but with the "Priority" dropdown menu highlighted by an orange circle. The "Ticket status" dropdown is now set to "On Hold - Internal". The "Priority" dropdown is currently empty. The rest of the form, including the "Ticket name", "Pipeline", "Ticket owner", "Ticket description", and "Category" fields, remains the same.

8 Choose from; Low, Medium, High and Urgent

ID	Ticket owner	Ticket status
980749	No owner	New (Client Sup
864553	No owner	New (Client Sup
644667	No owner	New (Client Sup
180895	Amber Schauer	New (Client Sup
689075	No owner	New (Client Sup
370741	No owner	New (Client Sup
218065	No owner	New (Client Sup
889202	No owner	New (Client Sup
670109	No owner	New (Client Sup
505770	No owner	New (Client Sup
260588	Amber Schauer	In Progress (Cli
272743	Logan Scott	Escalated (Clier
157617	Logan Scott	New (Client Sup

Client Support

Ticket status *
On Hold - Internal

Priority

- Low
- Medium
- High
- Urgent

First Response Date/Time *

9 Click and type into the "Ticket description" field

864553	No owner	New (Client Sup
644667	No owner	New (Client Sup
180895	Amber Schauer	New (Client Sup
689075	No owner	New (Client Sup
370741	No owner	New (Client Sup
218065	No owner	New (Client Sup
889202	No owner	New (Client Sup
670109	No owner	New (Client Sup
505770	No owner	New (Client Sup
260588	Amber Schauer	In Progress (Cli
272743	Logan Scott	Escalated (Clier
157617	Logan Scott	New (Client Sup

Ticket status *
On Hold - Internal

Priority
Low

Ticket owner
Amber Schauer

Ticket description

Category

First Response Date/Time *

Create Create and add another Cancel

10 Select the categories that apply to the ticket (more info to come)

No owner	New (Client Sup	Amber Schauer
No owner	New (Client Sup	
Amber Schauer	New (Client Sup	
No owner	New (Client Sup	
No owner	New (Client Sup	
No owner	New (Client Sup	
No owner	New (Client Sup	
No owner	New (Client Sup	
No owner	New (Client Sup	
Amber Schauer	In Progress (Clie	
Logan Scott	Escalated (Clie	

Amber Schauer

Ticket description

Category

Hardware

Software

Clear

Ticket Origin

Shared teams

11 Choose Date/Time for First Response from the calendar and clock

	Ticket ID	Ticket owner	Ticket status
<input type="checkbox"/>	40597980749	No owner	New (Client Sup
<input type="checkbox"/>	40504864553	No owner	New (Client Sup
<input type="checkbox"/>	40497644667	No owner	New (Client Sup
<input type="checkbox"/>	40495180895	Amber Schauer	New (Client Sup
<input type="checkbox"/>	40492689075	No owner	New (Client Sup
<input type="checkbox"/>	40486370741	No owner	New (Client Sup
<input type="checkbox"/>	40486218065	No owner	New (Client Sup
<input type="checkbox"/>	40299889202	No owner	New (Client Sup
<input type="checkbox"/>	40290670109	No owner	New (Client Sup
<input type="checkbox"/>	40244505770	No owner	New (Client Sup
<input type="checkbox"/>	40163260588	Amber Schauer	In Progress (Clie
<input type="checkbox"/>	40147272743	Logan Scott	Escalated (Clie
<input type="checkbox"/>	40144157617	Logan Scott	New (Client Sup

34 tickets

Amber Schauer

Ticket description

sdfds

Category

First Response Date/Time *

MM/DD/YYYY HH:MM Now

January 2026

Su Mo Tu We Th Fr Sa

28 29 30 31 1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 31

1 2 3 4 5 6 7

Today Clear

Create Create and add another Cancel

12 Click "Ticket Origin" and choose from Email, Phone and BeyondTrust

The screenshot shows a ticket management interface. On the left, there is a list of 34 tickets with columns for Ticket ID, Ticket owner, and Ticket status. On the right, there is a form for creating a new ticket. The form includes fields for Ticket owner (Amber Schauer), Ticket description (sdfds), Category, and First Response Date/Time (01/29/2026, 4:00 PM EST). The Ticket Origin dropdown is highlighted with an orange circle, and the options Email, Phone, and BeyondTrust are visible.

Ticket ID	Ticket owner	Ticket status
40597980749	No owner	New (Client Sup
40504864553	No owner	New (Client Sup
40497644667	No owner	New (Client Sup
40495180895	Amber Schauer	New (Client Sup
40492689075	No owner	New (Client Sup
40486370741	No owner	New (Client Sup
40486218065	No owner	New (Client Sup
40299889202	No owner	New (Client Sup
40290670109	No owner	New (Client Sup
40244505770	No owner	New (Client Sup
40163260588	Amber Schauer	In Progress (Cli
40147272743	Logan Scott	Escalated (Clier
40144157617	Logan Scott	New (Client Sup

Ticket Owner
Amber Schauer

Ticket description
sdfds

Category

First Response Date/Time *
01/29/2026 4:00 PM EST Now

Ticket Origin
Email
Phone
BeyondTrust

Create Create and add another Cancel

13 Click the contacts dropdown to search for contacts to associate to the ticket

The screenshot shows a ticket management interface. On the left, there is a list of tickets with columns for Ticket ID, Ticket owner, and Ticket status. On the right, there is a form for associating a ticket with contacts. The form includes a dropdown for Associate records (Search) and a dropdown for Association label (No label). The Search dropdown is highlighted with an orange circle.

Ticket ID	Ticket owner	Ticket status
		New (Client Sup
		New (Client Sup
		New (Client Sup
	chauer	New (Client Sup
		New (Client Sup

Associate Ticket with

Contacts

Associate records
Search

Association label
No label

Add timeline activity from this Contact ⓘ

[+Add more](#)

14 Click this dropdown to search and associate a company (Facility/Client)

The screenshot shows a table of records on the left and a modal window on the right. The table has columns for owner and status. The modal window is titled '+Add more' and contains a section for 'Companies'. Under 'Associate records', there is a search bar and a dropdown menu. The dropdown menu is open, showing a search bar with the text 'Search' and a list of company names: ulh.org, advesthealth.com, corp-target.us, emi.health, electro-mechanical.com, and medtarget. An orange circle highlights the search bar in the dropdown menu. At the bottom of the modal window, there are three buttons: 'Create', 'Create and add another', and 'Cancel'.

15 Click "Create"

The screenshot shows the same table and modal window as in step 14. The modal window is now closed, and the 'Create' button at the bottom left is highlighted with an orange circle. The modal window now shows the 'Association label *' field with the value 'Primary' and a checkbox for 'Add timeline activity from this Company' which is unchecked. The 'Create' button is now a dark grey button with the text 'Create' in white.