



# **Guide to Submitting a Marketing Request Ticket in HubSpot**

---

**When you need literature or marketing materials, please fill out the “Marketing Literature Creation Request Form” and then submit a ticket (with the form attached) through the “Marketing Requests” ticket pipeline in HubSpot. Following this process helps us stay organized and ensures you receive the materials you need as quickly as possible.**

**The following slides will provide step-by-step instructions on how to properly submit a marketing request in HubSpot.**

# How to submit a marketing request ticket

First, fill out the “Marketing Literature Creation Request Form” and save/download it as an PDF attachment. Please fill out all of the fields to the best of your ability.

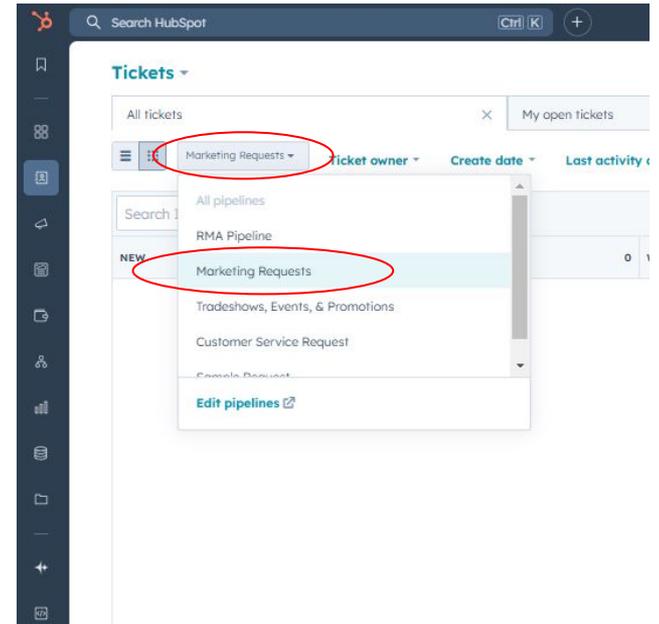
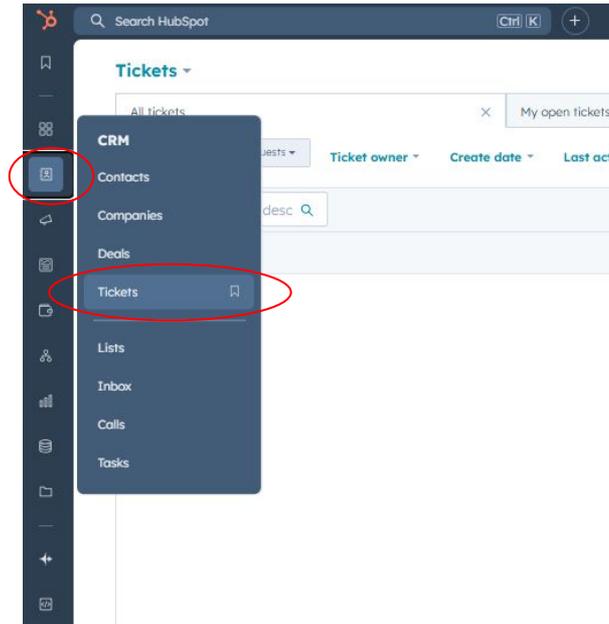
You can access the request form [here](#). This is a link an article in the Knowledge Base where you can download the form.

|    | A  | B | C | D  | E |
|----|--|---|---|--|---|
| 1  | Requestor                                  |   |   | Date requested                                 |   |
| 2  |  |   |   |  |   |
| 3  | Type of literature / deliverable requested |   |   | Required completion date                       |   |
| 4  |  |   |   |  |   |
| 5  | Specific vertical - if applicable          |   |   | Vertical specific buzzwords / lingo to include |   |
| 6  |  |   |   |  |   |
| 7  | Specific products to include               |   |   |  |   |
| 8  |  |   |   |  |   |
| 9  | Level of detail technical details required |   |   | Other pertinent information                    |   |
| 10 |  |   |   |  |   |
| 11 |  |   |   |  |   |
| 12 | Key points to include in the copy          |   |   | Preferred imagery to include                   |   |
| 13 |  |   |   |  |   |

# How to submit a marketing request ticket

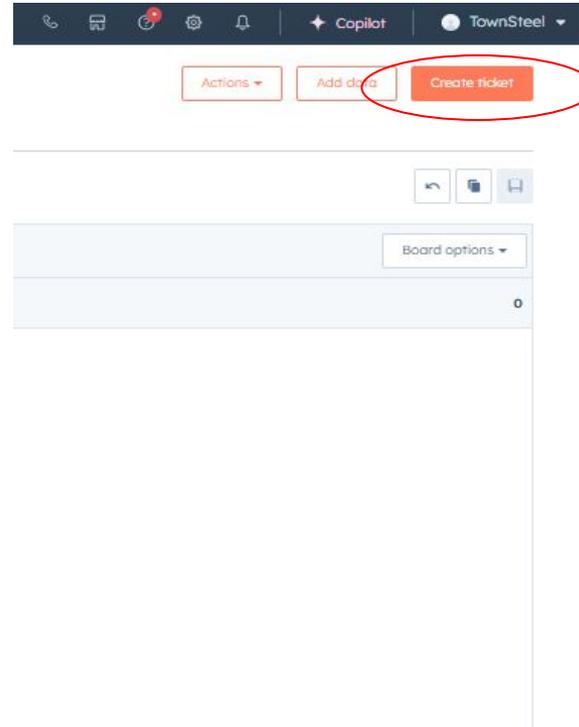
Find the Marketing Requests tickets by clicking on “Tickets” under “CRM”.

Click on the pipeline dropdown and choose “Marketing Requests”.



# How to submit a marketing request ticket

On the right side of the screen, click “Create Ticket” and a “Create Ticket” form will pop up on the right side. Please fill out all of the required fields on this form.



# How to submit a marketing request ticket

**Ticket name:** Type in a title for what you are requesting

**Pipeline:** Make sure “Marketing Requests” is selected

**Ticket Status:** New

**Create date:** Type the date you are creating the ticket

**Ticket description:** Type in a brief description of what you are requesting (ex. Requesting a sell sheet for the Aegis ....)

**Ticket owner:** Make sure to select your own name

**Priority:** Be realistic in your dates and give us as much time as you can. If every request is marked “high” we will do FIFO

**Close date:** Type in the due date for the request

The screenshot shows a 'Create ticket' form with the following fields highlighted by red boxes:

- Ticket name \***: A text input field.
- Pipeline \***: A dropdown menu with 'Marketing Requests' selected.
- Ticket status \***: A dropdown menu with 'New' selected.
- Create date \***: A date picker field showing 'MM/DD/YYYY'.
- Ticket description \***: A text area.
- Priority \***: A dropdown menu.
- Ticket owner \***: A dropdown menu with 'Katie Ma' selected.
- Close date**: A date picker field showing 'MM/DD/YYYY'.

Other visible fields include 'Category' and 'Source', which are not highlighted. At the bottom, there are three buttons: 'Create', 'Create and add another', and 'Cancel'.

# How to submit a marketing request ticket

After you fill out the required fields, there will be a section at the bottom of that “Create Ticket” form. You do not need to worry about associations for this specific scenario. You will be able to hit the orange “Create” button after filling out all of the required fields.

The screenshot shows a form titled "Associate ticket with" with two main sections: "Contacts" and "Companies".

- Contacts Section:**
  - Expandable header: "Contacts" (with a downward arrow)
  - Section title: "Associate records"
  - Search field: "Search" (with a dropdown arrow)
  - Section title: "Association label"
  - Association label field: "No label" (with a dropdown arrow)
  - Checkbox: "Add timeline activity from this contact" (with an information icon)
  - Link: "+ Add more"
- Companies Section:**
  - Expandable header: "Companies" (with a downward arrow)
  - Section title: "Associate records"
  - Search field: "Search" (with a dropdown arrow)
  - Section title: "Association label" (with an asterisk and information icon)
  - Association label field: "Primary" (with a dropdown arrow)
  - Checkbox: "Add timeline activity from this company" (with an information icon)
  - Link: "+ Add more"

At the bottom of the form, there are three buttons: "Create" (highlighted with a red circle), "Create and add another", and "Cancel".

# How to submit a marketing request ticket

The screenshot displays a CRM interface for a "Marketing Request" ticket. On the left, a sidebar contains navigation options like "Note", "Email", "Call", "Task", "Meeting", and "More". Below this is a section titled "About this ticket" with details such as "Ticket owner: Katie Ma", "Create date: 02/28/2025", and "Priority: Low". The main area shows the "Activities" tab with a search bar and filters for "Activity", "Notes", "Emails", "Calls", "Tasks", and "Meetings". The activity feed shows two entries from February 2025: "Katie Ma moved ticket to New. View details" and "This ticket was created by Katie Ma". On the right, a panel lists various relationship categories: "Companies (0)", "Deals (0)", "Attachments", "Conversations (0)", "Playbooks", "Past Feedback (0)", and "Tickets (0)". A large grey box with a black border is overlaid on the bottom half of the activity feed, containing the text: "Once you create the ticket, this is what the ticket page will look like."

# How to submit a marketing request ticket

**\*THIS IS CRUCIAL!**

After you create the ticket, navigate to “Activities” and then “Notes”.

Click “Create Note” and then remember to @ Brad Parks, Natalie Lipski, and Katie Ma in order for us to get notified about this ticket and respond to you ASAP. Please do this every time you submit a ticket.

The screenshot displays a CRM interface. At the top, there are tabs for 'Overview' and 'Activities', with 'Activities' selected and circled in red. Below the tabs is a search bar for activities and a 'Collapse all' button. A secondary row of tabs includes 'Activity', 'Notes', 'Emails', 'Calls', 'Tasks', and 'Meetings', with 'Notes' selected and circled in red. A 'Create Note' button is also circled in red. The main content area contains a message: 'Take notes about this record to keep track of important info. You can even @mention a teammate if you need to. [Learn more](#)'. On the right side, there are sections for 'Contacts (0)', 'Companies (0)', 'Deals (0)', and 'Attachments', each with an '+ Add' button. A modal window titled 'Note' is open, showing a form for creating a note. The 'For' field contains 'Testing Marketing Request'. The note text is '@Brad Parks @Natalie Lipski @Katie Ma Just submitted a request for a sell sheet for .....|'. Below the text is a rich text editor with formatting options (B, I, U, L, More) and a toolbar with icons for link, image, video, document, and plus. The modal also shows 'Associated with 1 record', a checkbox for 'Create a To-do task to follow up In 3 business days (Thursday)', and a 'Create note' button. A 'Draft saved' notification is visible in the bottom right corner of the modal.

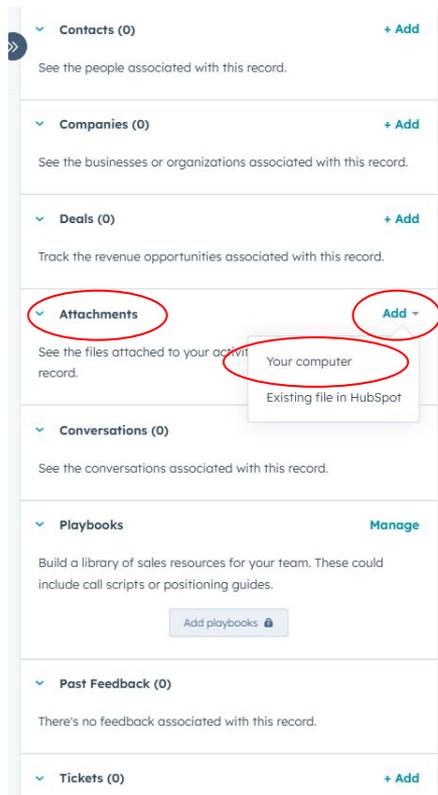
# How to submit a marketing request ticket

## \*ONE LAST CRUCIAL THING!

On the right side of the ticket page, you will see this column.

Navigate to “Attachments”. Click “Add” and then “Your computer”.

Upload the PDF attachment of the “Marketing Literature Creation Request Form” that you previously filled out. This ensures that we will be able to access the official form and get in contact with you/get started on the request.



The screenshot displays the HubSpot interface for a record, showing various associated items. The 'Attachments' section is highlighted with a red circle, and the 'Add' button next to it is also circled in red. A dropdown menu is open, showing the 'Your computer' option, which is also circled in red. Other sections visible include 'Contacts (0)', 'Companies (0)', 'Deals (0)', 'Conversations (0)', 'Playbooks', and 'Past Feedback (0)'. The 'Tickets (0)' section is at the bottom with a '+ Add' button.