PipelineSync

FREE TEMPLATE · SERVICE PIPELINE

HubSpot Ticket Pipeline Template

Plan every ticket pipeline before you build or change it: what it is for, each status with the criteria your team agrees, the properties agents fill in, how channels route tickets, the SLA plan per priority and a monthly review. Reference pages, a worked example and fillable worksheets.

Pipeline plan | Ticket statuses | Routing and SLAs | Monthly review

Edition October 2026 · HubSpot facts checked 28 Oct 2026

Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

Most help desk problems start before the first ticket: statuses nobody defined, routing nobody checked and SLA targets nobody agreed. Write those decisions down here and keep this as the record of how tickets move.

1 Check your plan and seats
What your plan and seats allow for help desk, routing and SLAs (pages 3 to 5).

2 List every pipeline
One row per ticket pipeline in the pipeline plan, before adding new ones (page 7).

3 Write the brief
For each pipeline: purpose, owner, access and ticket defaults (page 9).

4 Design the statuses with the team
Statuses in order with criteria and required properties (pages 10 and 11).

5 Plan routing and SLAs
Channels, routing, capacity, then SLA goals per priority (pages 12 and 13).

6 Automate, then review monthly
Automation per status, the monthly review and the change log (pages 14 and 15).

What is inside

Page	Section	Use it to
03	**Reference: help desk and pipelines**	Plans, seats, default statuses and ticket defaults
04	**Reference: channels and routing**	Channels, routing options, distribution and capacity
05	**Reference: properties and SLAs**	Core properties, SLA goals, statuses and pausing
06	**Standards: statuses and criteria**	Agree how to name statuses and write criteria a lead can check
07	**Pipeline plan**	Record every ticket pipeline, its purpose, owner and defaults
08	**Worked example**	See a complete, illustrative customer support pipeline
09	**Pipeline brief**	Plan one pipeline before you build it
10	**Ticket statuses**	Write every status in order with the team
11	**Required ticket properties**	Decide what agents must fill in, and when
12	**Channels and routing**	Record each channel, its routing rule and capacity
13	**SLA plan**	Set goals per priority, schedules and pause statuses
14	**Automation per status**	Decide what runs at each status and who owns it
15	**Monthly review and change log**	Track backlog, SLA breaches and reopened tickets

Tip: Every worksheet is fillable in Acrobat Reader, Preview or your browser, or print it. Copy the brief and status pages for each pipeline. A spreadsheet version is on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

Help desk and the ticket pipeline

A ticket pipeline is the set of ticket statuses a support request moves through, from the first message to closed. Statuses are the ticket version of deal stages, and each one is marked Open or Closed. When we checked, the help desk workspace needed Service Hub Professional or Enterprise, and creating a custom pipeline needed Starter or higher.

Plans, seats and permissions

Feature	Requirement (October 2026)
Help desk workspace	Service Hub Professional or Enterprise
Viewing and replying to tickets	Service or Sales Access permissions
Custom views, SLAs, reply recommendations	Assigned Service Seat
Routing rules and capacity limits	Service Seat; every routed user needs one too
Skill-based routing	Service Hub Enterprise; Super Admin to set up
Custom ticket pipelines	Starter, Professional or Enterprise (free tools: none)
Restrict a pipeline by team, clone a pipeline	Professional or Enterprise
Stage calculated properties	Professional or Enterprise

Users without a Service Seat only see My Mentions, Following and All Open; Super Admins see every view. Help desk was not available on the HubSpot mobile app when we checked. Pipeline limits are shared across objects and vary by pricing model: check Data Model > Limits.

The default Support Pipeline



HubSpot's four default ticket statuses. Rename or add statuses to match how your team works.

Why Open or Closed matters

- Unassigned, My Team's Open and All Open only show tickets in an Open status
- All Closed shows tickets in a Closed status
- Conditional stage properties can require a value, such as Resolution, when a ticket moves to a status

Ticket defaults

- In help desk settings under Ticket defaults, choose the pipeline, status and priority new tickets get
- Channel settings can override them
- Each pipeline also has an Automate tab and a Pipeline Rules tab

REFERENCE · CHECKED OCTOBER 2026

Channels and routing

Help desk channels create a ticket for every incoming message or submission. Tickets arrive unassigned unless the channel's Routing tab sends them to users and teams, a team only, the contact owner, an assignment workflow or the customer agent. Distribution is Load Balanced, Round Robin or Random, and by default only available agents receive tickets.

Channels that create tickets

Channel	What it does in help desk
Team email	Creates tickets from emails sent to a shared address
Chat	Website visitors start conversations through a chatflow; rule-based chatbots don't create tickets
Forms	Creates tickets from form submissions
Calling, WhatsApp, Facebook Messenger	Calls and messages sit alongside other tickets
Custom channels	Marketplace integrations or the custom channels API

HubSpot says accounts created after April 1, 2024 can't create tickets from channels connected to the inbox, so connect support channels to help desk. A workflow ticket from an unconnected channel won't show its thread in help desk.

Routing options

Route to	What to know
Specific users and teams	Only main team members receive tickets, unless your account is in the multiple main teams beta
Team only	No ticket owner; lands in My Team's Unassigned. The team needs one user with a Service Seat
Contact owner	Needs an owner and cookie tracking, plus a fallback rule
Assignment workflow	Runs a ticket-based workflow with an assignment action

Load Balanced

Assigns to available users with the fewest open tickets of the same type: Calling, Messaging or Email/Other. Only open help desk tickets assigned in the last 30 days count.

Capacity limits SERVICE SEAT

Cap open tickets per user, in total or per channel type; the calling limit is 0 or 1. Users at capacity are skipped. You can exclude statuses, such as Waiting on contact, from the count.

Skill-based routing (Service Hub Enterprise) matches tickets to agents by language or custom skills. Each ticket's assignment details show which rule, availability and capacity check applied.

REFERENCE · CHECKED OCTOBER 2026

Ticket properties and SLAs

HubSpot requires Ticket name, Pipeline and Ticket status when you create a ticket manually. SLA goals in help desk (Service Hub Professional or Enterprise) time Time to first reply, Time to next reply and Time to close, and can apply to all tickets or by one property such as priority. Super Admins set them.

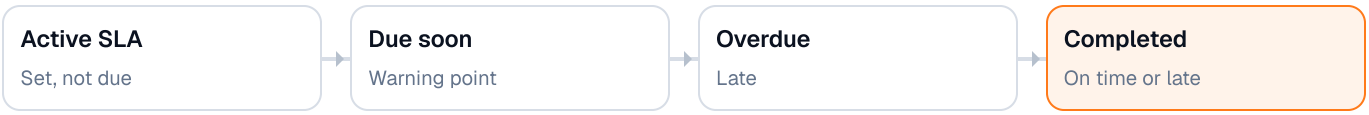
Core ticket properties

Property	Use it for
Priority, Owner, Ticket description	Routing, SLA rules, views and the agent's context
Source, Originating channel type	Filled in automatically; report by where tickets come from
Close date, Time to close	Filled in automatically; resolution reporting
Resolution	The action taken; require it on your Closed status
Assigned teams STARTER+	The main team set by automatic assignment
Category, Language ENTERPRISE	Set by AI from the ticket's messages; category is off by default
Date entered, Cumulative time in [status] PRO / ENT	Stage calculated properties: where tickets wait

SLA settings in help desk

- **Scope:** all tickets, one ticket property (priority, team, source or pipeline), or a combination of properties (Service Hub Enterprise). Turn Goal Active? off for values with no SLA.
- **Mark as due soon** sets the warning point. **Schedule:** all times, or During specific time with a time zone and hours per rule.
- **Pause conditions** by pipeline and ticket status stop the timer. Snoozing a ticket does not pause its SLA.
- **Set once:** the rule is chosen when the SLA is applied and isn't re-evaluated if properties change. With combined rules, the highest matching rule wins; add a fallback rule.

SLA statuses on each ticket



Shown in Time to First Response SLA Status and Time to Close SLA Ticket Status, with matching due date properties. Use them in workflows, lists and reports. SLA labels only show to users with a Service Seat. HubSpot's own example times explain the settings; they are not recommended targets.

STANDARDS

Naming statuses and writing criteria

A status name should say who the ticket is waiting on, not how the agent feels about it. Criteria should be something a support lead can check on the ticket without asking the agent. Agree both with the team that works the tickets, then use them in every pipeline.

Vague criteria and checkable criteria

Hard to check	A support lead can check it on the ticket
"Working on it"	Agent replied; the next step and owner are in an internal note
"Pending"	Agent asked the customer a question; the reply is the only thing missing
"With engineering"	Escalation reason filled in; steps to reproduce on the ticket
"Sorted"	Customer confirmed the fix, or no reply by the agreed date; Resolution filled in
"Urgent"	Priority set to the agreed value at creation, so the right SLA rule applies

These are illustrative examples, not HubSpot rules. Your team writes its own.

RECOMMENDED STATUS NAME PATTERN

Who or what the ticket is waiting on

Example: **Waiting on us** · **Waiting on contact** · **Escalated to product** · **Closed**

Your standards

Status name pattern	
Most statuses per pipeline	
Criteria must be	e.g. visible on the ticket, written as an event, agreed by the support lead
Who may add or rename a status	
Priority values and meaning	
Agreed by / date	

- [ ] Every pipeline has one owner
  Who approves status and routing changes
- [ ] Every Open status has exit criteria
  Written before the pipeline goes live
- [ ] Closed needs a Resolution
  A required property on that status
- [ ] Changes go in the change log
  Page 15

WORKSHEET

Pipeline plan

One row per ticket pipeline, including the default Support Pipeline. Keep separate pipelines for processes that really differ, such as support and onboarding; one per team is harder to report on without changing how tickets are worked.

ID	Pipeline name	Purpose	Tickets it holds	Owner	Team only	Teams with access	Default status	Default priority	Time in status	Status
T-01	*Customer support*	*Customer questions and problems from first message to resolution*	*Existing customers only*	*Support lead*	*Yes*	*Support team*	*New*	*Medium*	*On*	*Live*

Team only: pipeline restricted by team (Professional or Enterprise). Default status and priority: the ticket defaults new tickets get, unless a channel overrides them. Time in status: stage calculated properties on or off (Professional or Enterprise). Status: Planned, Building, Live, Retire.

WORKED EXAMPLE · ILLUSTRATIVE

Customer support pipeline

An illustrative design for a small support team on Service Hub Professional. Your statuses, routing and numbers will differ; the point is how much is agreed before anyone builds it.

Purpose	Customer questions and problems from first message to resolution. Onboarding projects use their own pipeline.
Owner and access	Support lead · restricted to the Support team and Support leads
Channels and routing	Team email and a support form, both connected to help desk; Specific users and teams: Support team, Load Balanced, available agents only
SLA plan	One property: Priority. Targets agreed by the support lead (left blank here); support hours schedule; paused in Waiting on contact

#	Status	Open?	Exit criteria (agreed by the team)	Customer waits on	Required to enter	SLA pause	Automation
1	New	Open	Agent replied or asked for more detail	A first reply	Priority	No	Routing rule assigns owner
2	Waiting on us	Open	Agent replied with an answer or question	Our answer or fix		No	Due soon alert to owner
3	Waiting on contact	Open	Customer replied, or follow-up date passed	Nothing: we wait on them		Yes	Excluded from capacity
4	Escalated to product	Open	Product team answered or a fix shipped	A fix or decision	Escalation reason	No	Post to product channel
5	Closed	Closed	(closed)	Nothing	Resolution		None

Why the custom status

Agents had parked product issues in Waiting on us, so the support lead couldn't tell them from tickets the team owed a reply. Escalated to product makes them visible in a custom view and gets its own alert.

First monthly review

Five tickets completed Time to close late, all in Escalated to product. Action: the support lead and product lead agree whether that status should pause the close SLA, and log the decision.

All values on this page are made up for illustration. Escalated to product and Escalation reason are example custom fields, not HubSpot defaults.

WORKSHEET · COPY FOR EACH PIPELINE

Pipeline brief

Pipeline name and ID	
Purpose (one sentence)	
Tickets it holds	
Tickets it must not hold	
Owner	
Plan check (page 03)	☐ Help desk (Service Pro / Ent) ☐ Custom pipeline allowed ☐ Service Seats assigned

Who works tickets in this pipeline, and what they need from it

Restrict to teams	☐ No ☐ Yes, teams: _____
Ticket defaults	Status: _____ Priority: _____
How tickets arrive	☐ Email ☐ Chat ☐ Form ☐ Calling ☐ Workflow ☐ Agent creates
Stage calculated properties	☐ On (Pro / Ent) ☐ Off
Integrations that create or move tickets	
Views and reports that use it	
Handoff to other teams	
Success measure	
Approved by / date	

DONE FOR YOU

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We design the ticket pipeline and statuses with your team, connect channels, set routing, capacity and SLAs, build the automation and fill in this template for you.

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WORKSHEET · COPY FOR EACH PIPELINE

Ticket statuses

Pipeline: _____ Fill this in with the agents and the support lead. Include at least one Closed status; help desk views depend on the Open or Closed flag.

#	Status name	Open / Closed	Entry: what is true when a ticket arrives	Exit: what must happen before it leaves	Customer is waiting on	Required properties	Pauses SLA	Excluded from capacity	Who moves it
1	*New*	*Open*	*A message or form created the ticket*	*Agent replied or asked for detail*	*A first reply*	*Priority*	*No*	*No*	*Routing rule*
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

Pauses SLA: add this status to the SLA rule's pause conditions (snoozing does not pause SLAs). Excluded from capacity: leave it out of capacity limit counts. Required properties: conditional stage properties shown or required when a ticket moves to the status.

WORKSHEET

Required ticket properties

Pipeline: _____ Decided by: _____

Ticket name, Pipeline and Ticket status are required by default on manual creation. Add a property only when someone will report on it or route by it; every extra field slows agents down.

Property	Default / custom	Required when	Filled by	Owns the definition	Used in (routing, SLA, view, report)
Resolution	*Default*	*Ticket moves to Closed*	*Agent*	*Support lead*	*Monthly review, knowledge base gaps*

Properties that decide routing and SLAs

HubSpot picks the SLA rule when the SLA is applied and doesn't re-evaluate it, so properties such as Priority must be set when the ticket is created.

Property	Decides (rule, view, team)	Set at creation by (channel default, form field, workflow)	Checked on (date)
Priority	*SLA rule, high priority view*	*Channel default, then the form field*	

- [ ] Resolution required on Closed
  Conditional stage property
- [ ] No two automations set the same property
  One owner per property

WORKSHEET

Channels and routing

One row per channel that creates tickets. Every agent you route to needs a Service Seat. Capacity limits only need a value if you set them; record what is documented in your account, not a guess.

Channel	Address or name	Pipeline	Default priority	Route to	Team or users	Distribution	Available only	Fallback	Skills (Ent)	Capacity limit
Team email	*support@ (example)*	*Customer support*	*Medium*	*Users and teams*	*Support team*	*Load Balanced*	*Yes*	*Team only*		*Set by lead*

Channel: Team email, Chat, Forms, Calling, WhatsApp, Facebook Messenger, Custom. Route to: Specific users and teams, Team only, Contact owner (needs a fallback), Assignment workflow, Customer agent. Distribution: Load Balanced, Round Robin, Random. Calling capacity is 0 or 1.

- [ ] Every support channel connected to help desk
  Not the inbox
- [ ] Someone owns the Unassigned view
  For tickets no rule could assign

WORKSHEET · WITH THE SUPPORT LEAD

SLA plan per priority

The targets are yours to set from what your team can staff and what you promise customers. HubSpot's documentation uses example times to explain the settings; they are not recommendations, so none are filled in here.

Pipeline: _____ Scope: ☐ All tickets ☐ By Priority ☐ Combination (Ent)

Priority or rule	Active?	First reply target	Next reply target	Time to close target	Due soon at	Schedule (time zone, hours)
Fallback rule						

Pause in these statuses	
Apply changes to	☐ New tickets only ☐ New and existing open tickets
Holidays	Not documented for help desk schedules when we checked: test in your account

Breach alerts

SLA status property	Value	Notify (owner, lead, channel)	How (email, in-app, Slack)	Workflow name
Time to First Response SLA Status	*Due soon*	*Ticket owner*	*In-app*	*SLA: first reply due soon*

Set by (Super Admin) / date	

WORKSHEET

Automation per status

Start with what help desk does natively: ticket defaults, routing rules, capacity limits and SLA goals. Add workflows (Professional or Enterprise) for the gaps, and write each one down before you build it.

Pipeline: _____ Owner: _____

Status or trigger	What happens	Built with	Recipient or value	Owner	Tested
Escalated to product	*Post the ticket to the product team channel*	*Workflow*	*Product Slack channel*	*Support lead*	

Built with: Help desk setting, Routing rule, Pipeline automation (the pipeline's Automate tab), Workflow, SLA setting. An assignment workflow is a ticket-based workflow with an assignment action; capacity limits also apply to it.

Before you switch automation on

- [ ] Each workflow written down first
  Trigger, enrollment, actions, owner
- [ ] Tested on a sample ticket
  Each status and channel
- [ ] Alerts kept few and clearly named
  So the team doesn't ignore them
- [ ] Team told what changes
  Who to ask when something looks wrong

WORKSHEET · ONCE A MONTH

Monthly review and change log

Check	How	Done	Notes
Backlog	Open tickets by status and owner; tickets with no recent activity		
SLA breaches	Search "sla" in the report library; tickets completed late, by rule		
Reopened tickets	Tickets that came back after Closed; check how your account handles replies to closed tickets		
Unassigned and waiting	Unassigned views; Waiting on contact past the follow-up date		
Routing and seats	New agents have a Service Seat, the right team and capacity set		
Statuses and SLA rules	Still match how the team works; this file matches HubSpot		

This month's numbers

Pipeline	Created	Closed	Open at month end	First reply SLA late	Close SLA late	Reopened	Biggest cause
Customer support	*180*	*172*	*46*	*9*	*5*	*6*	*Escalations*

The example row is made up. The spreadsheet version calculates net backlog change (created minus closed). SLA hours properties only hold data from January 2025.

Change log

Date	Pipeline	What changed	Why, and what it affects	By
2026-10-28	*Customer support*	*Added Escalated to product status*	*Product issues were hidden in Waiting on us; SLA pause list reviewed*	*HubSpot admin*

PipelineSync

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We design ticket pipelines and statuses with your team, connect channels, set routing, capacity and SLAs, build the alerts and reports, then hand over this template filled in.

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