



CUSTOMER SUPPORT — CRM DOCUMENTATION

HubSpot CRM Documentation

A complete fictional CRM environment built and documented from scratch, covering how contacts, companies, tickets, and deals are structured and connected.

- HubSpot
- CRM Design
- Pipeline Management
- Data Modeling

1. Ticket Pipeline

9 support tickets built with backdated timestamps to simulate a realistic, ongoing support history.

Every ticket moves through the same five stages, so status is always unambiguous at a glance:

STAGE	MEANING
New	Just received, not yet triaged
In Progress	Actively being worked
Waiting on Contact	Blocked on a customer reply
Waiting on Us	Internal follow-up needed before it can move
Closed	Resolved and confirmed with the customer

Of the 9 tickets built, 4 reached Closed status with a logged resolution note, while the remainder sit across the earlier stages — deliberately, to show a pipeline mid-flow rather than a tidy, all-resolved snapshot that wouldn't reflect a real support queue.

2. Contact Management

9 contacts across 9 companies, each with a full activity history.

Every contact record tracks the same core fields, kept consistent so the database stays reportable as it grows:

FIELD	PURPOSE
Name & role	Who they are, and their standing to make decisions
Company association	Links the contact to their company record
Lifecycle stage	Lead, opportunity, or customer

Last activity	Most recent call, email, or ticket touchpoint
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Calls and emails were logged directly against each contact record — not just noted elsewhere — so the full interaction history is visible in one place without piecing it together from separate tools.

3. Deal Pipeline

9 deals tracked, including one Closed Won, moving through a standard five-stage pipeline.

STAGE	WHAT HAPPENS HERE
Prospecting	Initial interest identified
Qualified	Confirmed budget, need, and timeline
Proposal Sent	Pricing and scope shared
Negotiation	Terms being finalized
Closed Won / Closed Lost	Deal decided

Why one Closed Won matters: a pipeline with only open deals doesn't prove anything closes. Carrying at least one deal all the way through — with the associated contact, company, and activity history intact — demonstrates the full lifecycle a CRM is actually meant to support.

4. CRM Data Model

How contacts, companies, deals, and tickets connect to each other.

The four object types are never treated as isolated lists — each one is associated back to the others, which is what makes a CRM useful rather than just a set of spreadsheets:

OBJECT	CONNECTS TO
Company	Its contacts, its open and closed deals, its tickets
Contact	Their company, any deals they're involved in, tickets they've filed
Deal	The company and contact it belongs to, plus logged activity
Ticket	The contact and company who raised it, plus internal notes and resolution

Structuring it this way means a single company record shows its full relationship at a glance — who the contacts are, what's being sold to them, and whether they currently have any open support issues — which is exactly the view a support or account team needs before any conversation.