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SELF-SERVICE

Claim Manager Guide

Submit and approve claim access requests in HubSpot — quickly, transparently, and without the back-and-forth.

For Sellers • Sales Support • Managers

Overview

WHAT THIS GUIDE COVERS

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The Self-Service Claim Manager in HubSpot makes it easy to submit and process claim access requests. This guide walks through the full workflow — the fields, actions, and approvals involved.

✓

Sellers

Request access to a claim your team needs — no email chains, no waiting in the dark.

✓

Sales Support

Submit requests on behalf of sellers and track their status in one place.

✓

Managers

Approve or deny requests with two flexible ownership options for your team.

The workflow at a glance: Find the Claim → Create an Access Request → Manager Approves → Ownership Updates Automatically

Find an Existing Claim

STEP 1 OF 4 • GLOBAL SEARCH

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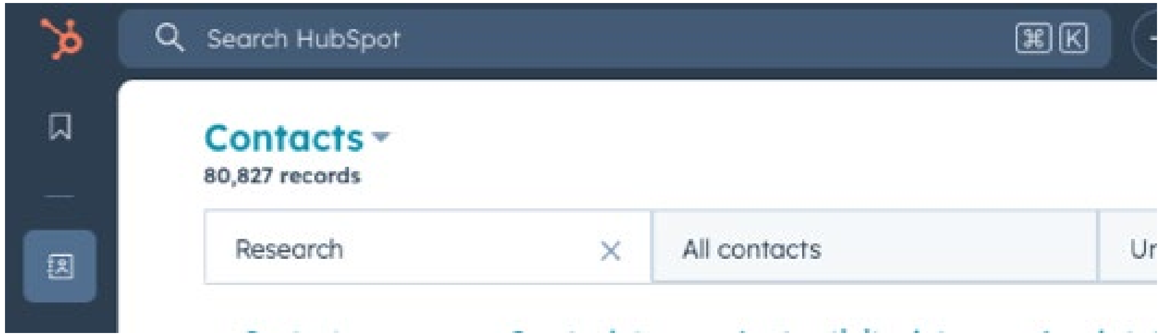
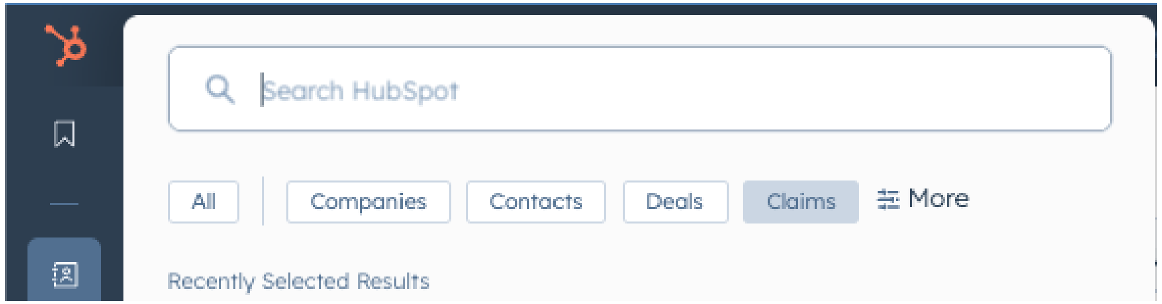
1. Click the **Search HubSpot** bar at the top of the screen.

- Review the grey-highlighted **object types** included in your search.

- If **Claims** isn't listed, click **More**, type “Claims,” and select it. It will stay in your filters for future searches.



The Search HubSpot bar



Object type filters — make sure Claims is included

Search & Open the Claim

STEP 1 OF 4 • GLOBAL SEARCH (CONT.)

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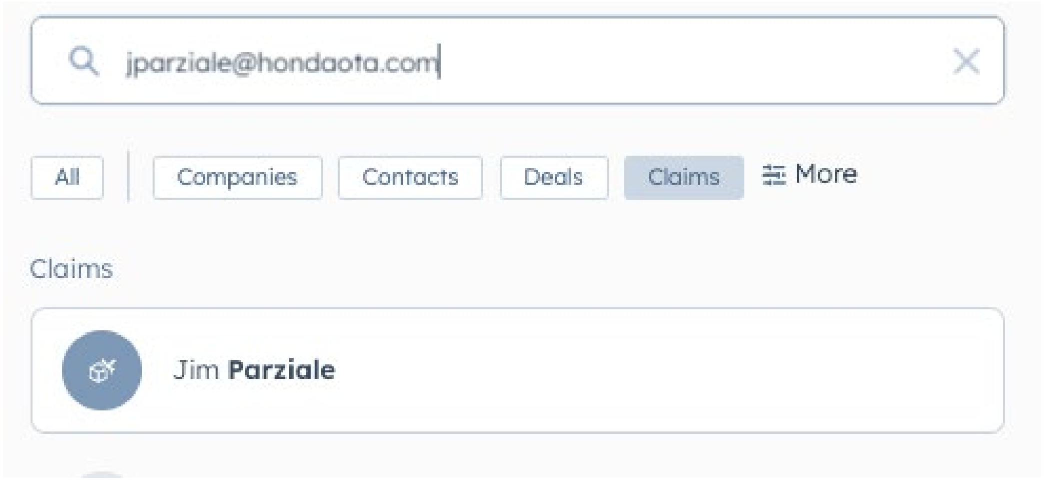
4 Search by **Name or Email address** (for contacts) or **Company name** (for companies).

5 Click the claim in the results to open the record.

6 Continue to the **Claim Manager** tab to create or manage an access request.

Tip: Adding Claims via More is a one-time setup — it sticks for every future search.



Searching by email surfaces the matching claim

Where to Start on the Claim

STEP 2 OF 4 • THE CLAIM RECORD

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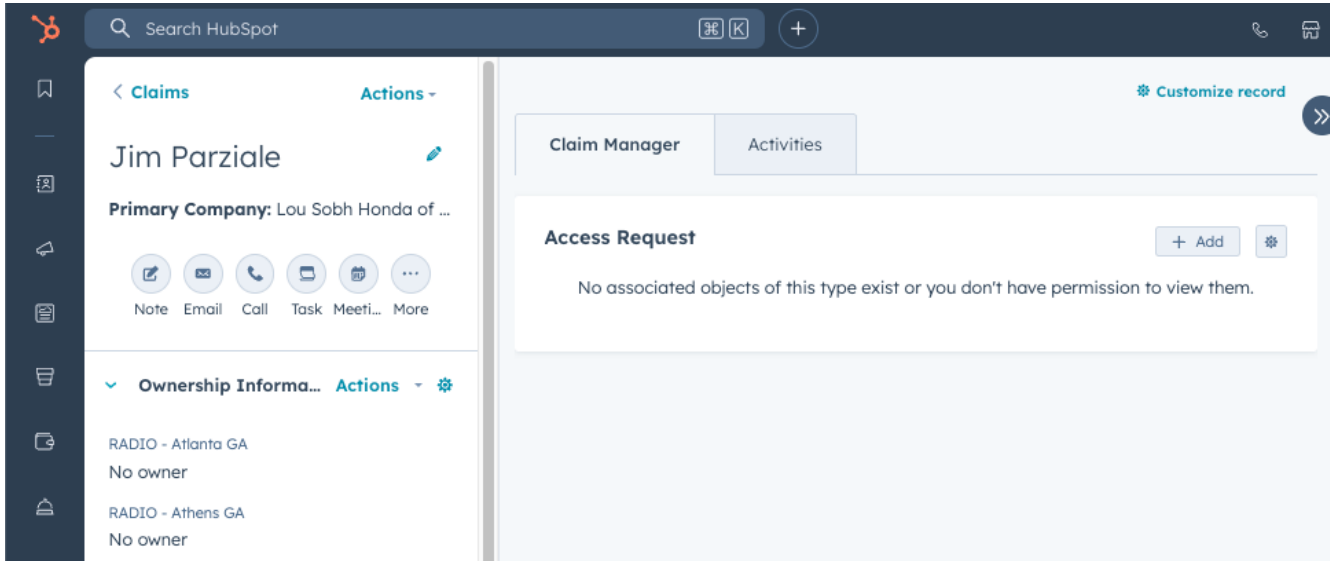
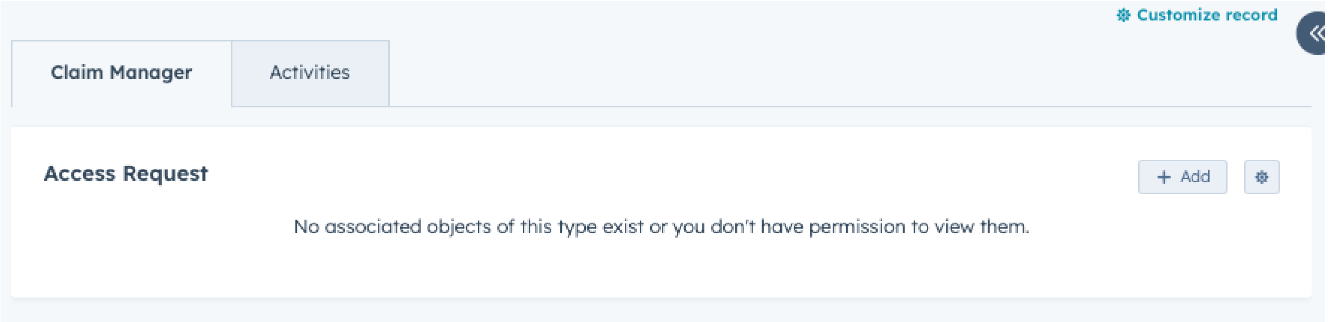
1. Open the **Claim** record.
2. Click the **Claim Manager** tab.
3. On the **Access Request** card, click **+ Add**.



The claim record — Jim Parziale, with the Claim Manager tab



Claim Manager tab → Access Request card → + Add

Create an Access Request

STEP 3 OF 4 • FILL IN THE FORM

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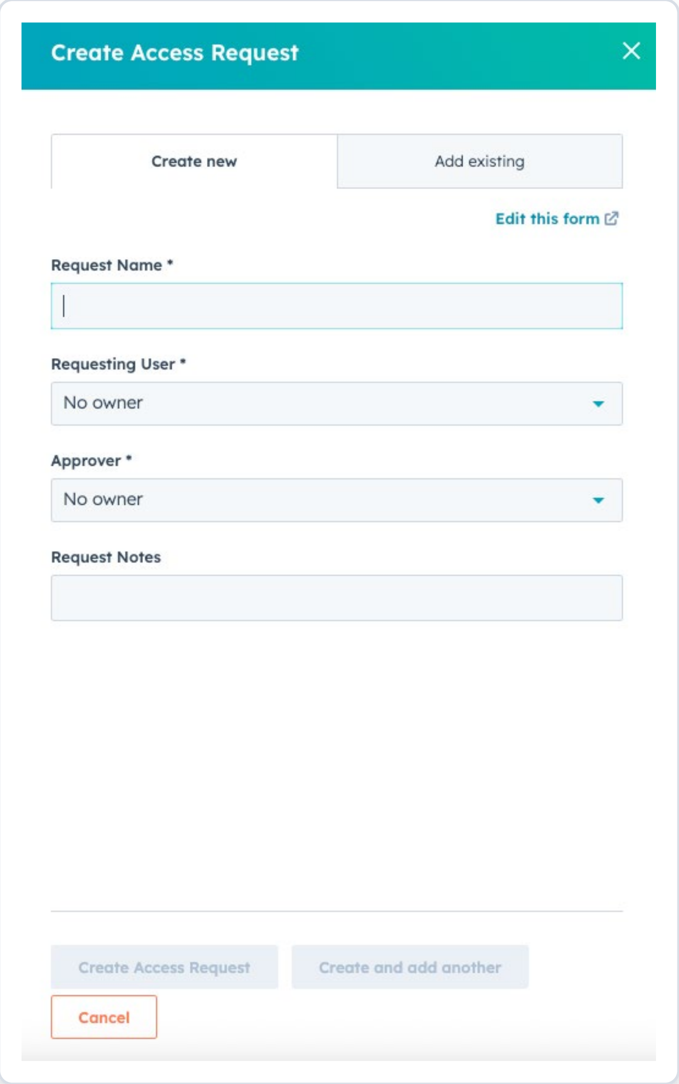

Request Name *

Enter your initials — it's overwritten automatically.

Requesting User *

Select the seller who needs access.

Approver *

Choose the requesting user's manager.

Request Notes (optional)

Add context to help the approver decide.

When you're done, click **Create Access Request**

What Happens Next

STEP 4 OF 4 • APPROVAL

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1 Approver is notified

They receive an email plus an in-app notification.

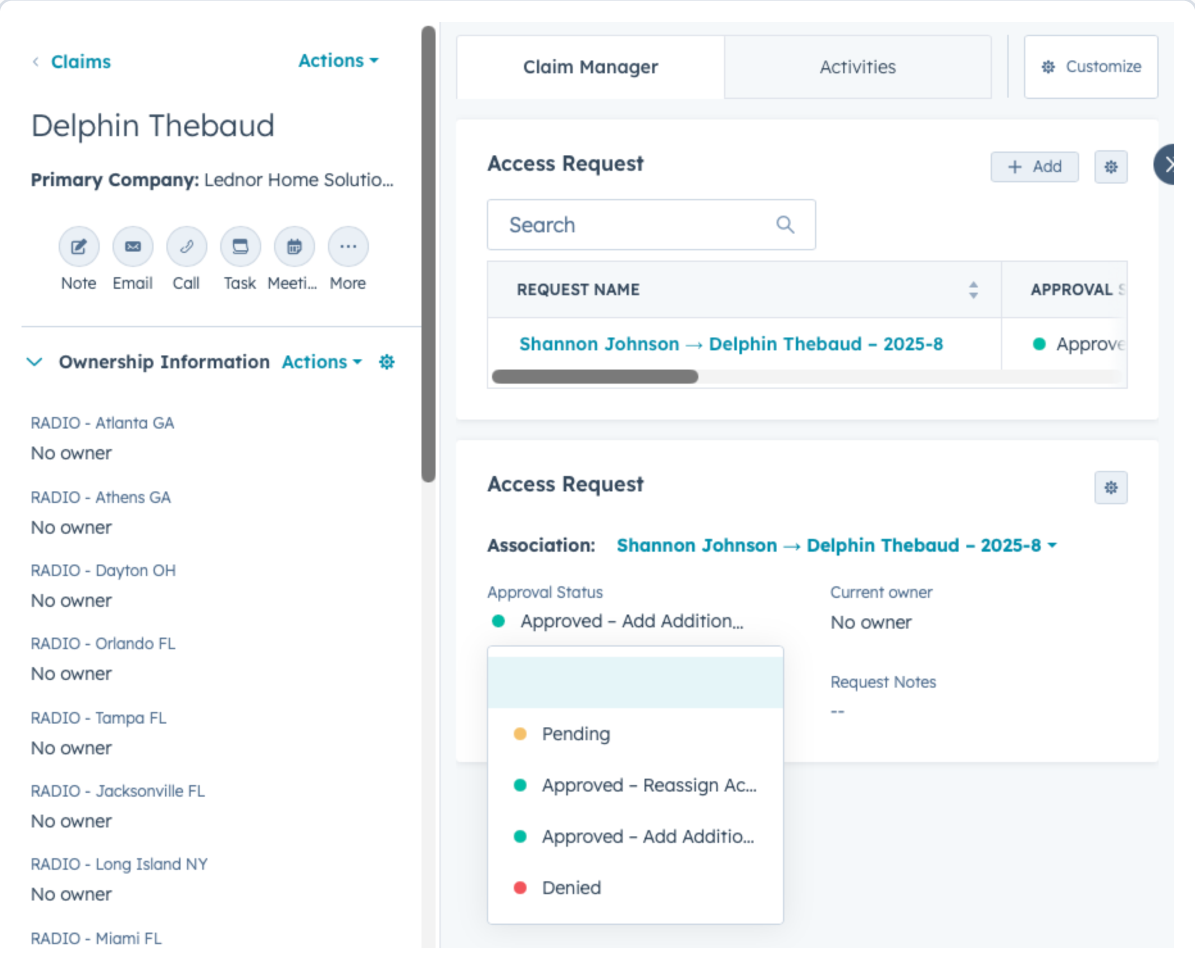
2 Request shows as Pending

Track it any time in the Claim Manager tab.

3 Approver takes action

Pending is changed to an approval type — or Denied.

Heads up: Only market leaders can update the status — this prevents accidental approvals.



Approval Status options on the Access Request

Notes for Approvers: Two Approval Types

CHOOSE THE RIGHT OWNERSHIP OPTION

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1 Reassign Account

What it does: Removes all existing owners and assigns the requesting seller as the only owner for their team.

When to use: Full ownership transfer is required within your team.

2 Add Additional Owner

What it does: Keeps current owners and adds the requesting seller as an additional owner for their team.

When to use: Multiple sellers on your team need shared access to the claim.

Important: Changes only impact ownership for the approver's team. Approvals do not affect ownership across teams.

After Approval & Quick Troubleshooting

AUTOMATION + FIXES

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After Approval

~1 minute: Automation updates ownership on the company/contact and the claim.

After 2 minutes with no update: Refresh the page. Still unchanged? Contact support.

Quick Troubleshooting

Can't find Claims?

Add it via More in global search.

Can't approve?

You may not have leader permissions.

Don't see your request?

Make sure you're on the Claim record's Claim Manager tab.

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Why It Works

- ✓ Flexible claim submissions
- ✓ Manager approvals without overloading leaders
- ✓ Accurate, automated ownership updates
- ✓ Two approval options for ownership handling
- ✓ Ownership changes only affect the approver's team
- ✓ Full audit trail via notes and status history

Need help? Submit a ticket at **help.cmg.com**