

# Guide - How to create your sequence

The purpose of this guide is to give more clarity of the process of how to create a sequence and how to use it in a workflow so the BDM's can send bulk emails to all of their travel agents

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## 1 Navigate to Global Home | HubSpot

## 2 Click on Sequences

The screenshot shows the HubSpot interface. On the left is a dark blue sidebar with the following menu items: Sales, Sales Workspace, Target Accounts, Prospecting Agent, Documents, Meetings Scheduler, Sequences (highlighted with a white circle), Activity Feed, Forecast, Coaching Playlists, and Sales Analytics. The main content area is light blue and contains several sections:

- Needs attention 1 item**: A notification card with a warning icon, stating "a year ago **enews.palaceelite.com** is no longer connected to HubSpot."
- Frequently visited**: Two dark blue cards. The first is "Deals" with a house icon and "Visited 48 times this week." The second is "Contacts" with a person icon and "Visited 15 times this week."
- Recent activity**: A row of three cards. The first is "Contact" with a "CUSTOMER" tag and a right arrow. The second is "List" with a "STATIC" tag and a right arrow. The third is partially visible, showing "List" and "MKT".

### 3 Click on highlighted area

For the moment we're going to select "Start from scratch" option

128 of 5,000 created

Actions Create sequence

Start from scratch  
Create a dynamic sequence

extension for [Gmail](#), [Outlook](#), or [Office 365](#). [Learn more](#)

New folder

	TOTAL ENROLLED	REPLY RATE	MEETING RATE	OWNER	DATE MODIFIED
	127	5.51%	0.79%	Moises Loria	21 days ago
	886	1.13%	0%	Vanessa Acosta	17 hours ago
	949	0.42%	0.21%	Rosalba Gonzalez	a month ago
	1,053	0.47%	0%	Julie Bennett	a month ago

### 4 Name your sequence

I recommend you to name your sequence: The name of the email - Your Name

New Sequence

Steps Settings Automate

TOTAL STEPS: 0  
DAYS TO COMPLETE: 1  
AUTOMATION: 0%  
UNENROLL CRITERIA: 2

Step 1  
Choose the first action that the sequence will perform

**Automated email**  
Automatically send an email for me

**Manual email task**  
Get a task reminder to send an email

## 5 Click on highlighted area

Select Automated Email

**Step 1**  
Choose the first action that the sequence will perform

- Automated email task**  
Automatically send an email for me
- Manual email task**  
Get a task reminder to send an email
- Call task**  
Get a task reminder to make a call
- General task**  
Set a general task reminder
- InMail task**  
Get a task reminder to send an InMail
- Connection request task**  
Get a task reminder to send a request

## 6 Click on highlighted area

Select create template

**Steps** Settings Automate

**DAYS TO COMPLETE** 1      **AUTOMATION** 0%      **UNENROLL CRITERIA** 2

Choose the first action that the sequence will perform

- Manual email task**  
Get a task reminder to send an email
- General task**  
Set a general task reminder

**Email template**  
Choose an existing template or create a new one

Create new template

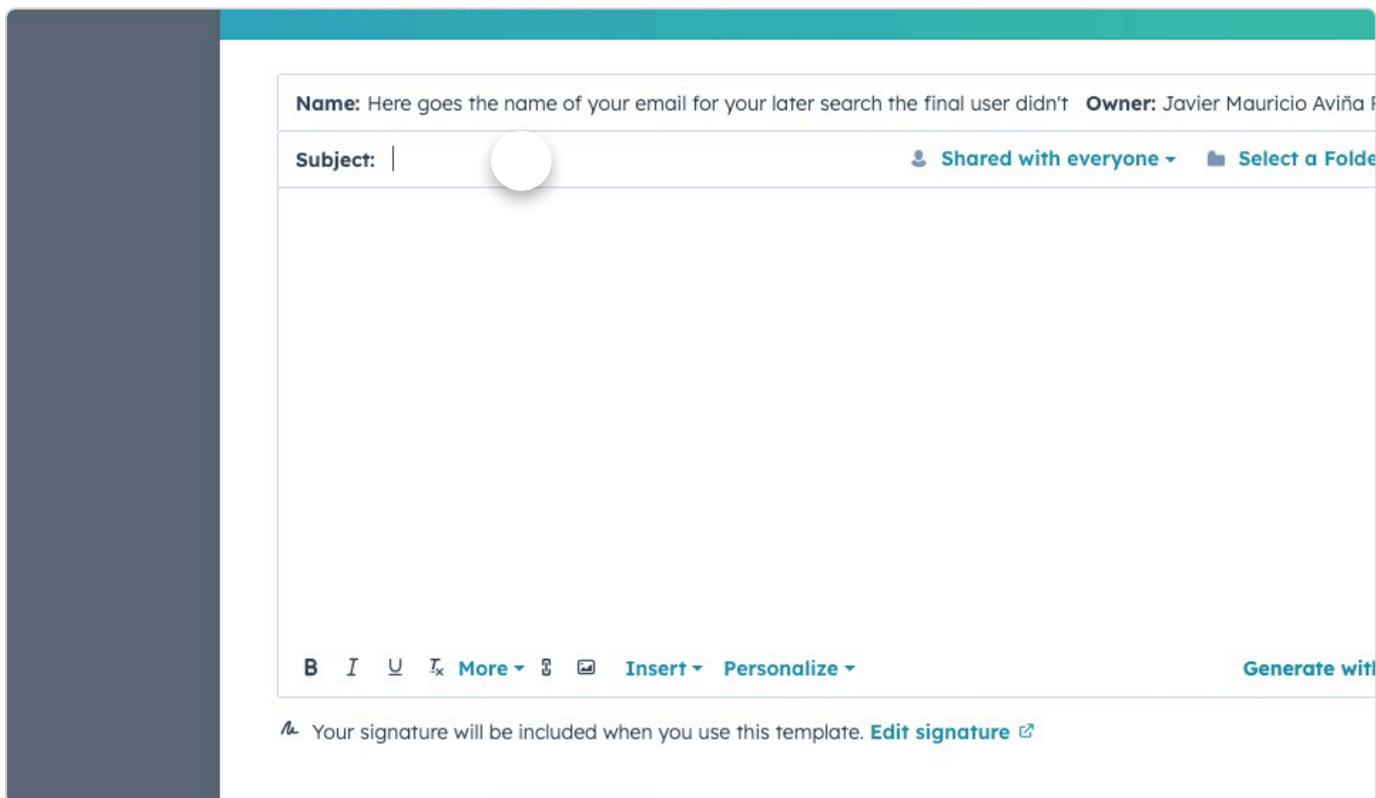
All templates

Search templates

- ACD IN - Español - LOST - COURT**  
Updated 17 minutes ago by Moises Loria
- ACD IN - LOST DEAL ENGLISH**  
Updated 20 minutes ago by Moises Loria
- TARIFAS SEMANALES**  
Updated 14 hours ago by Lizeth Arianna Hernandez
- TARIFAS SEMANALES**  
Updated 15 hours ago by Marisol Terrazas

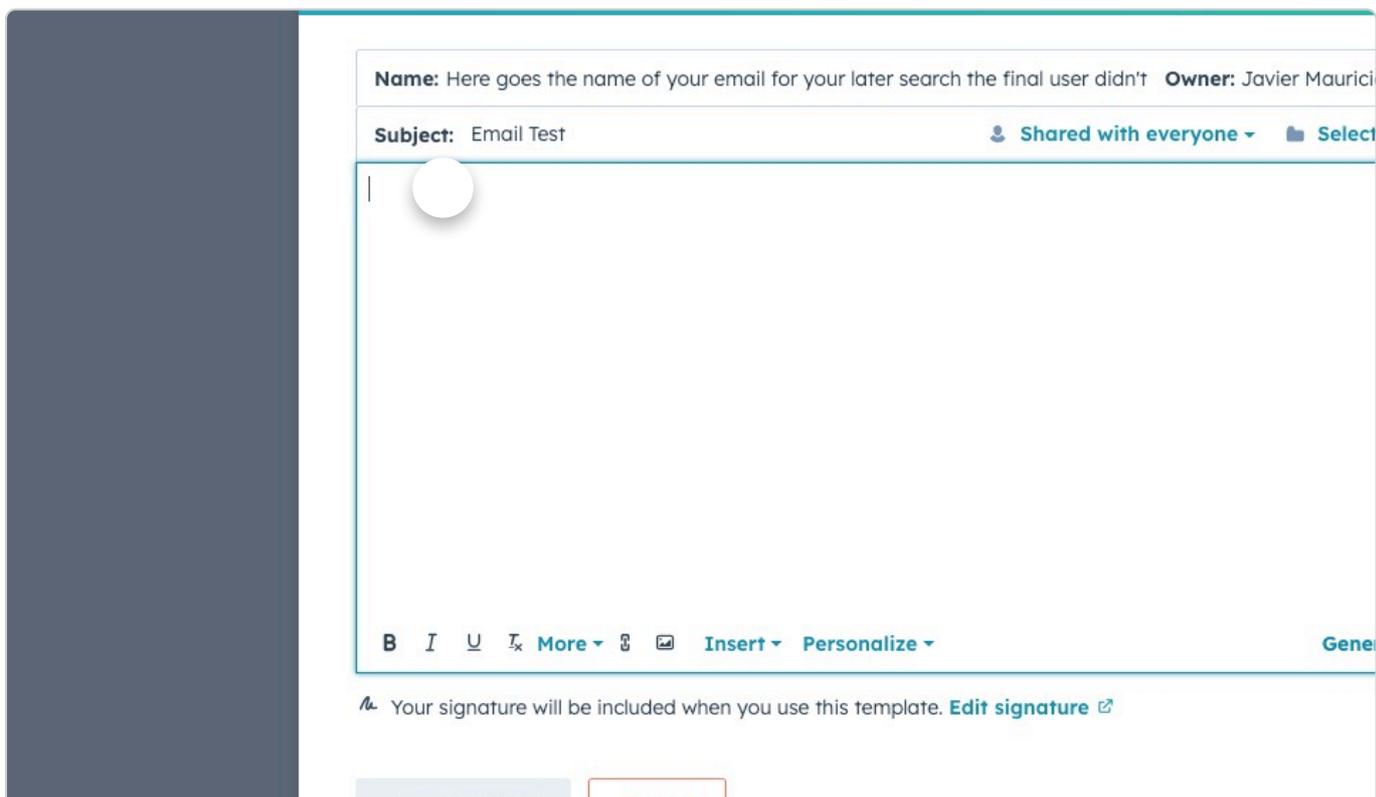
## 7 Click on highlighted area

We have to set the subject for the email that we are creating



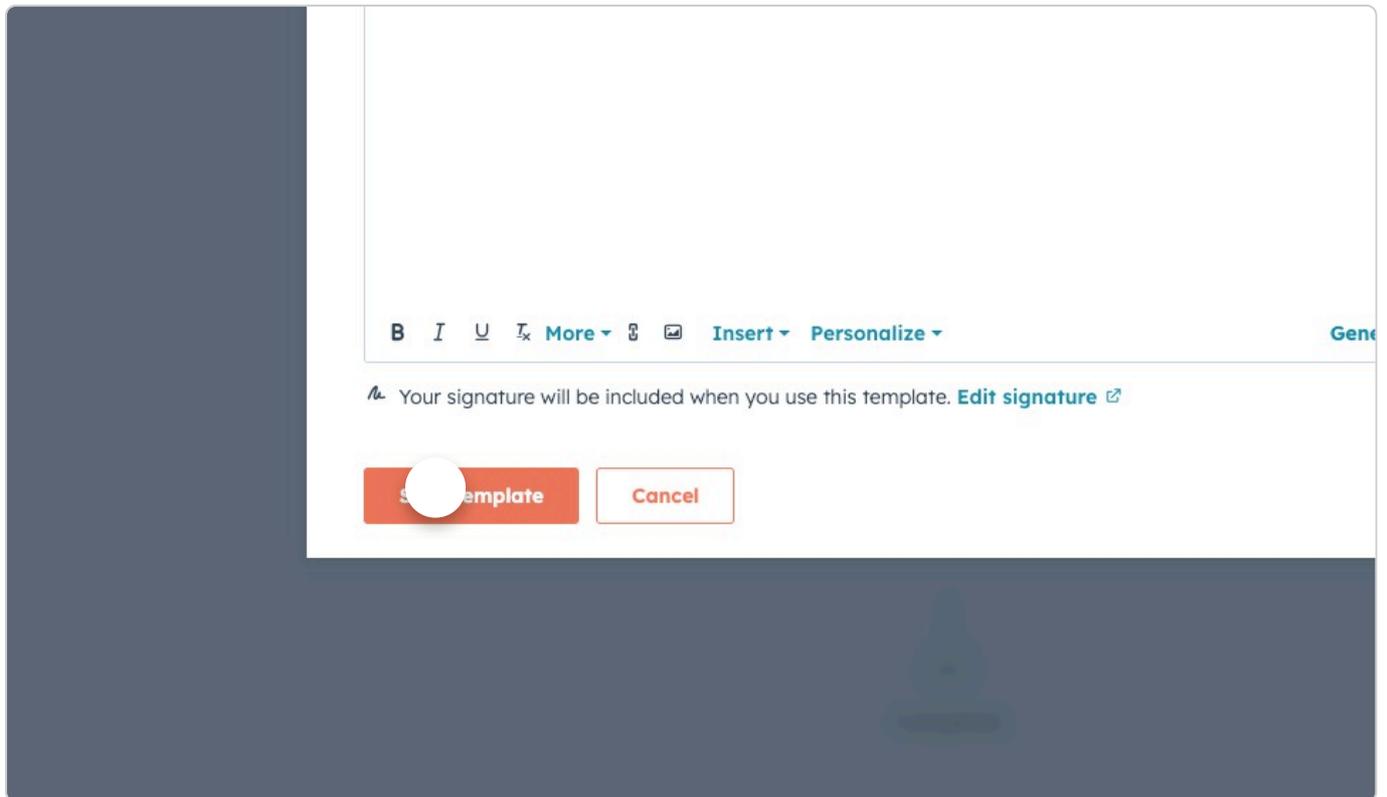
## 8 Click on highlighted area

Here goes the email body



## 9 Click on highlighted area

If the Name, Subject and Email body its ok, now we can save our template



## 10 Click on Save Sequence

