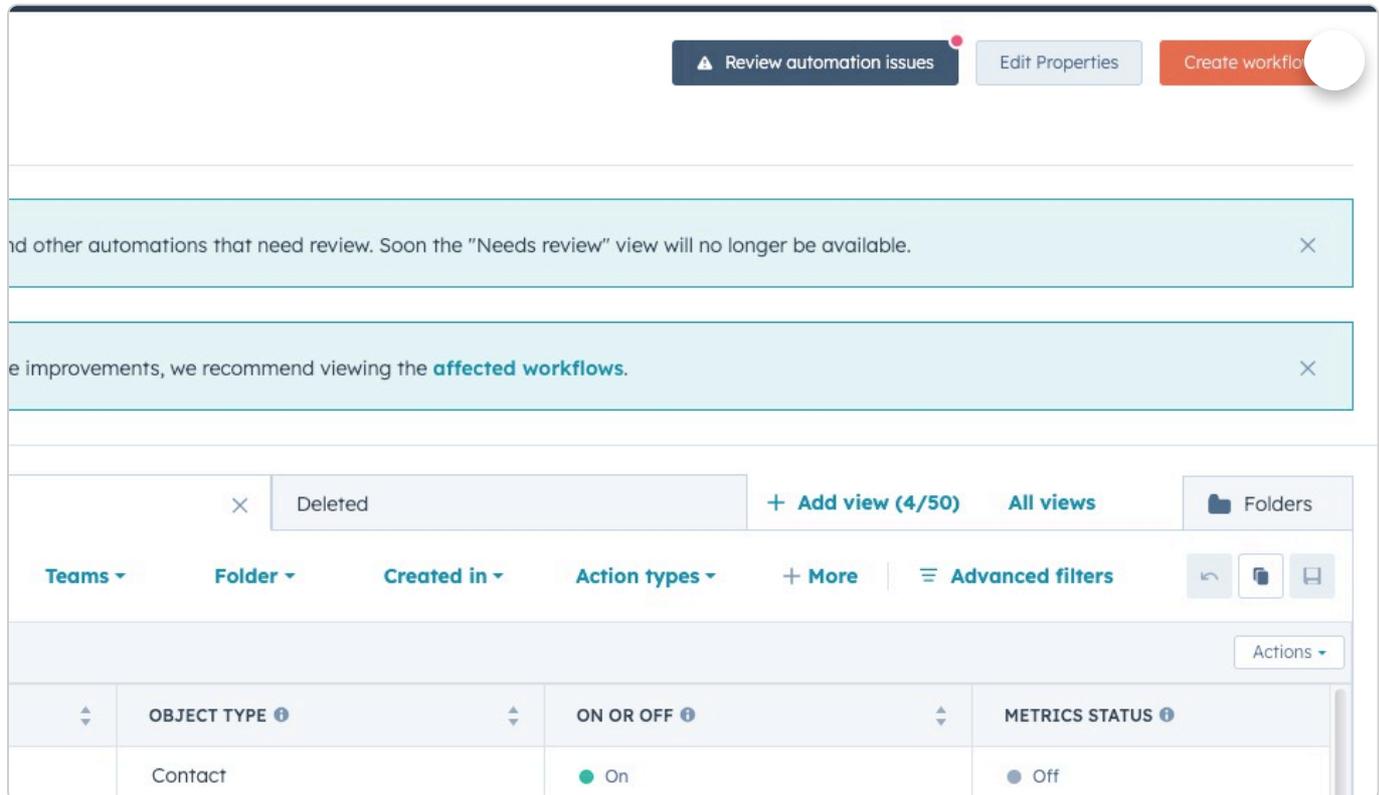


# Guide - How to create Workflows

Última actualización: 31 de jul. de 2025

## 1 Navigate to Workflows

## 2 Click on Create Workflows



The screenshot displays a user interface for managing workflows. At the top right, there are three buttons: 'Review automation issues' (dark blue with a warning icon), 'Edit Properties' (light blue), and 'Create workflow' (orange), which is highlighted with a white circle. Below these buttons are two teal notification banners with close icons. The main interface features a header with a 'Deleted' view selector, '+ Add view (4/50)', and 'All views'. Below the header are filter tabs for 'Teams', 'Folder', 'Created in', and 'Action types', along with '+ More' and 'Advanced filters'. An 'Actions' dropdown menu is visible on the right. The main content area is a table with columns for 'OBJECT TYPE', 'ON OR OFF', and 'METRICS STATUS'. The first row shows 'Contact' with 'On' status and 'Off' metrics.

OBJECT TYPE ⓘ	ON OR OFF ⓘ	METRICS STATUS ⓘ
Contact	<input checked="" type="radio"/> On	<input type="radio"/> Off

### 3 Click on From scratch

The screenshot shows a workflow management interface. At the top right, there are buttons for 'Review automation issues', 'Edit Properties', and 'Create workflow'. A dropdown menu is open under 'Create workflow', with 'From scratch' highlighted. Below the menu, there are two light blue notification banners. The first says '...s and other automations that need review. Soon the "Needs review" view will no longer be available.' The second says '...of the improvements, we recommend viewing the **affected workflows**.' Below these is a table with columns for 'OBJECT TYPE', 'ON OR OFF', and 'METRICS STATUS'. The table has two rows, both with 'Contact' in the first column, 'On' in the second, and 'Off' in the third.

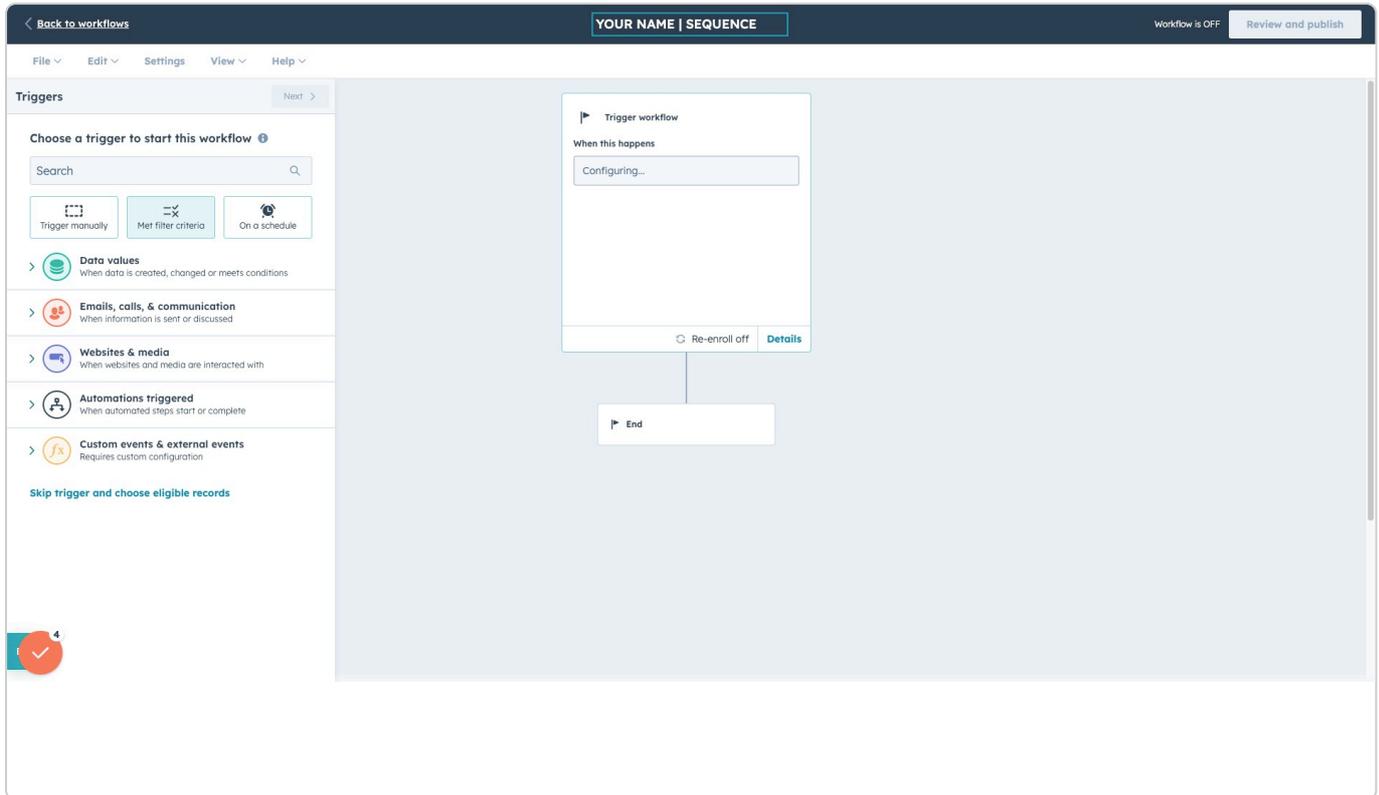
OBJECT TYPE ⓘ	ON OR OFF ⓘ	METRICS STATUS ⓘ
Contact	● On	● Off
Contact	● On	● Off

### 4 Click on Unnamed workflow

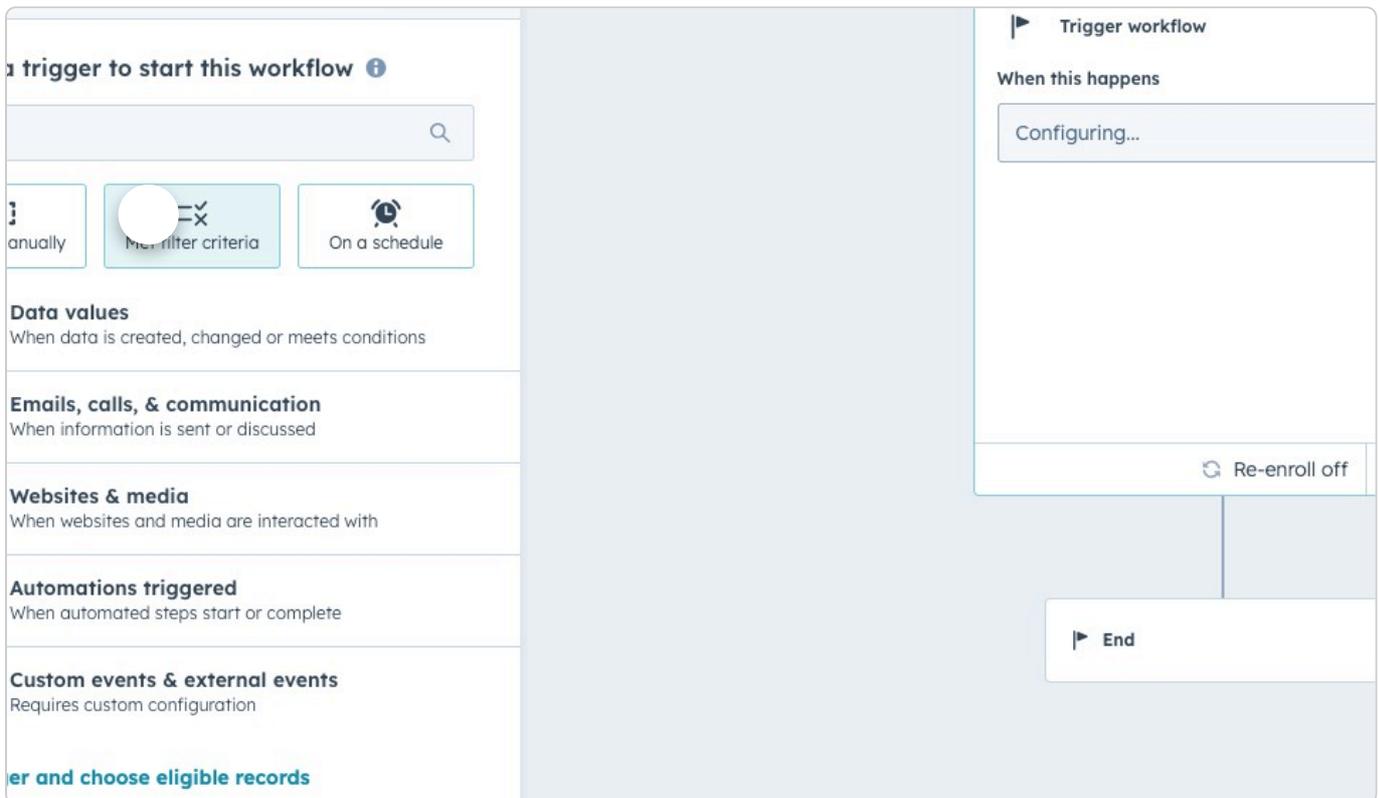
The screenshot shows a workflow configuration screen for an 'Unnamed workflow'. The main area is a light blue canvas. A central white box contains a 'Trigger workflow' section. Under 'When this happens', there is a 'Configuring...' button. At the bottom of the box, there are 'Re-enroll off' and 'Details' options.

## 5 Type the Workflow name

I recommend you to use this structure: YOUR NAME | SEQUENCE



## 6 Click on Met filter criteria



7

## Click on Contact

The screenshot shows a workflow builder interface. At the top, there are navigation buttons for '< Back' and 'Next >'. Below that, a progress indicator shows three steps: 'Start triggers' (checked), 'Eligible records' (current step), and 'Settings'. The 'Eligible records' step is titled 'Choose a type of record that can enroll'. A search bar is present. A list of record types is shown on the left, with 'Contact' highlighted. The main area shows a 'Trigger workflow' step with the text 'Only enroll unknowns that meet these conditions' and a box containing 'No enrollment conditions'. Below this, there are buttons for 'Re-enroll off' and 'Details'. The workflow ends with an 'End' step.

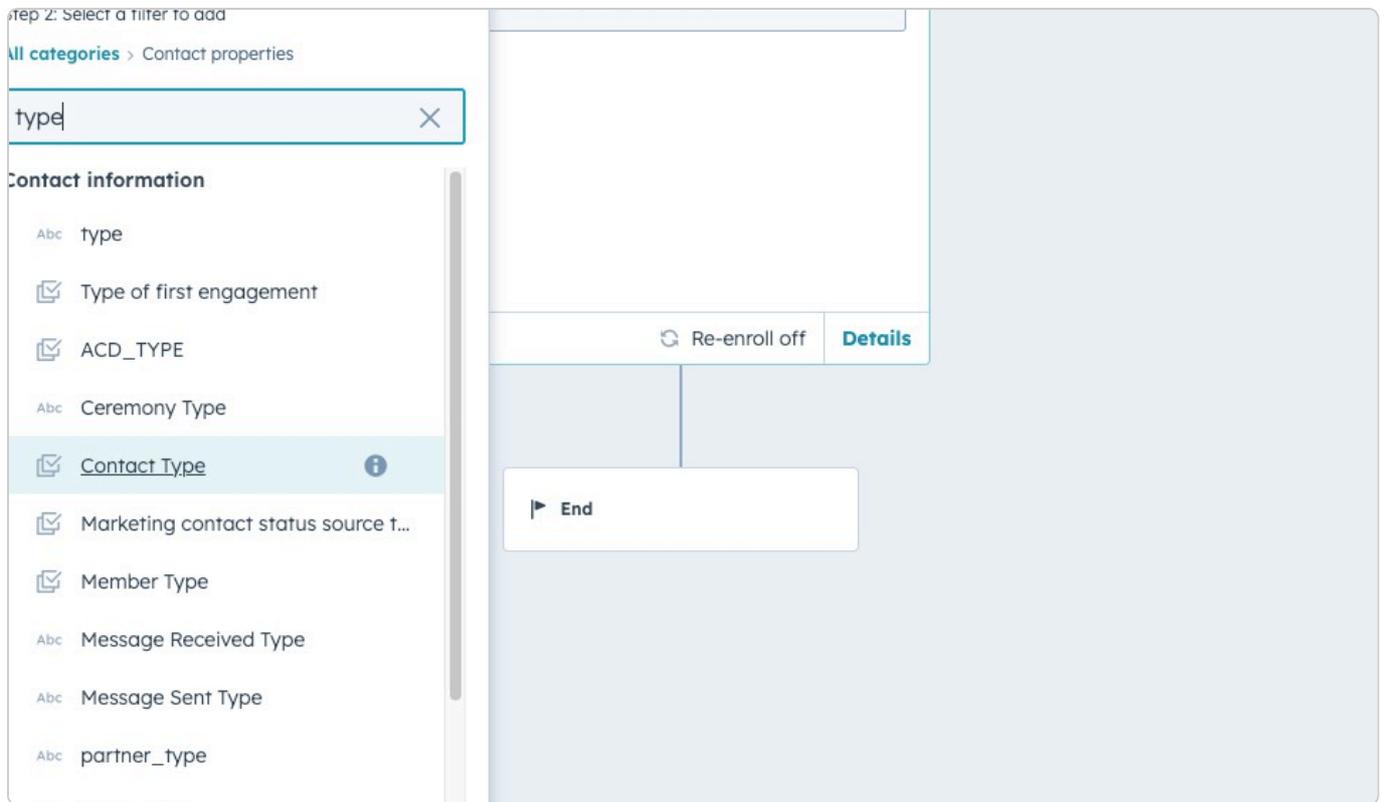
8

## Click on Contact properties

The screenshot shows a workflow builder interface. At the top, there are navigation buttons for '< Back' and 'Next >'. Below that, a progress indicator shows three steps: 'Start triggers' (checked), 'Eligible records' (current step), and 'Settings'. The 'Eligible records' step is titled 'Choose a type of record that can enroll'. A search bar is present. A list of record types is shown on the left, with 'Contact' highlighted. The main area shows a 'Trigger workflow' step with the text 'Only enroll unknowns that meet these conditions' and a box containing 'No enrollment conditions'. Below this, there are buttons for 'Re-enroll off' and 'Details'. The workflow ends with an 'End' step.

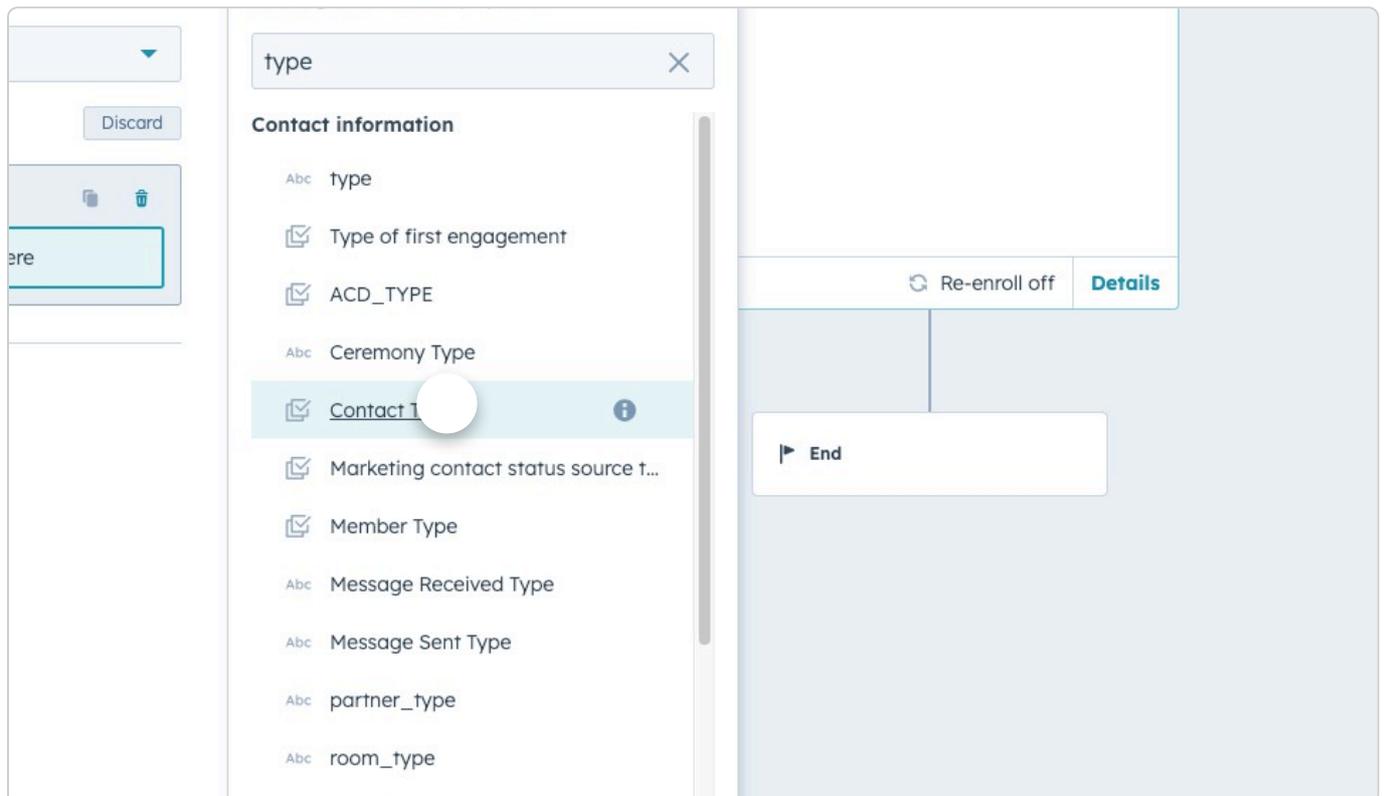
9

## Search for "Contact Type"

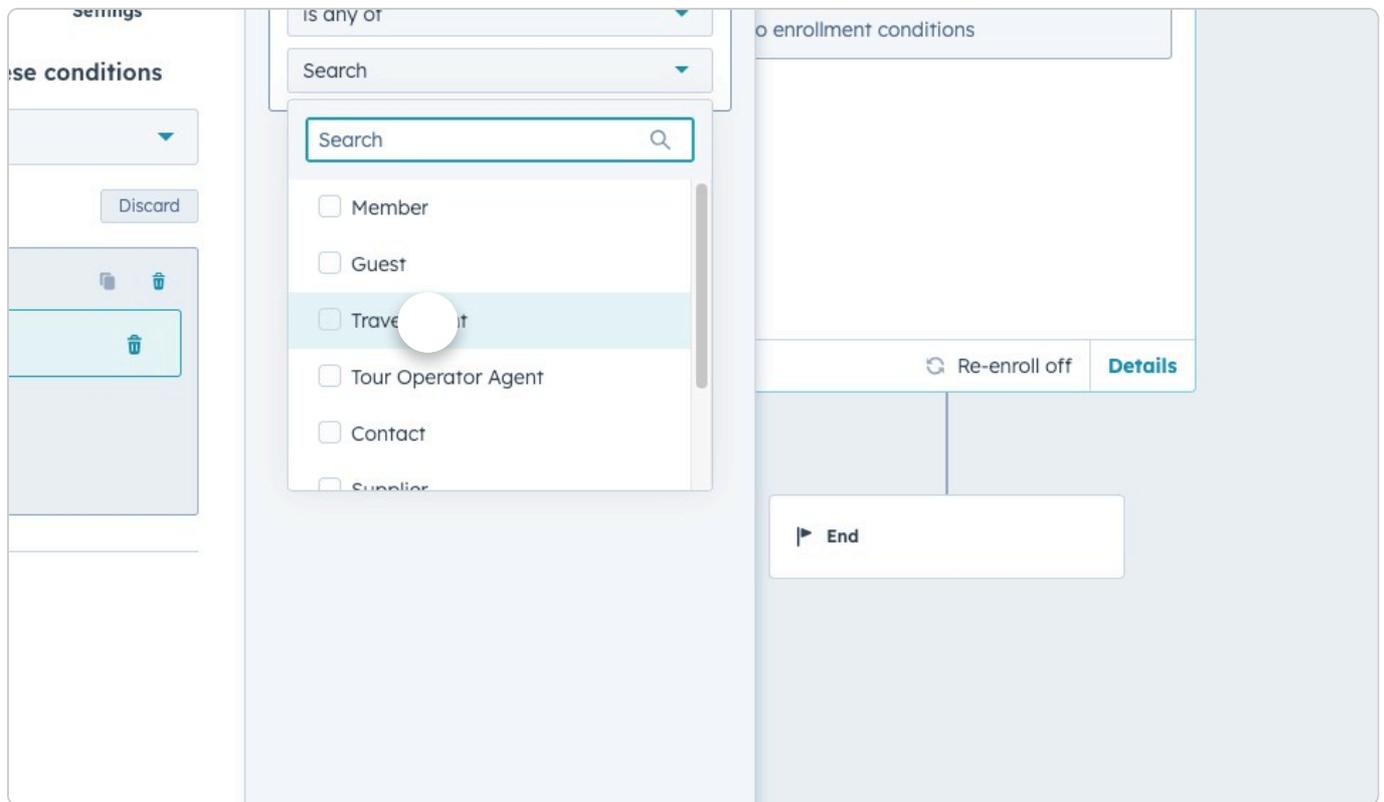


10

## Click on highlighted area



## 11 Choose "Travel Agent"



## 12 Click on highlighted area

We are going to add another criteria



13

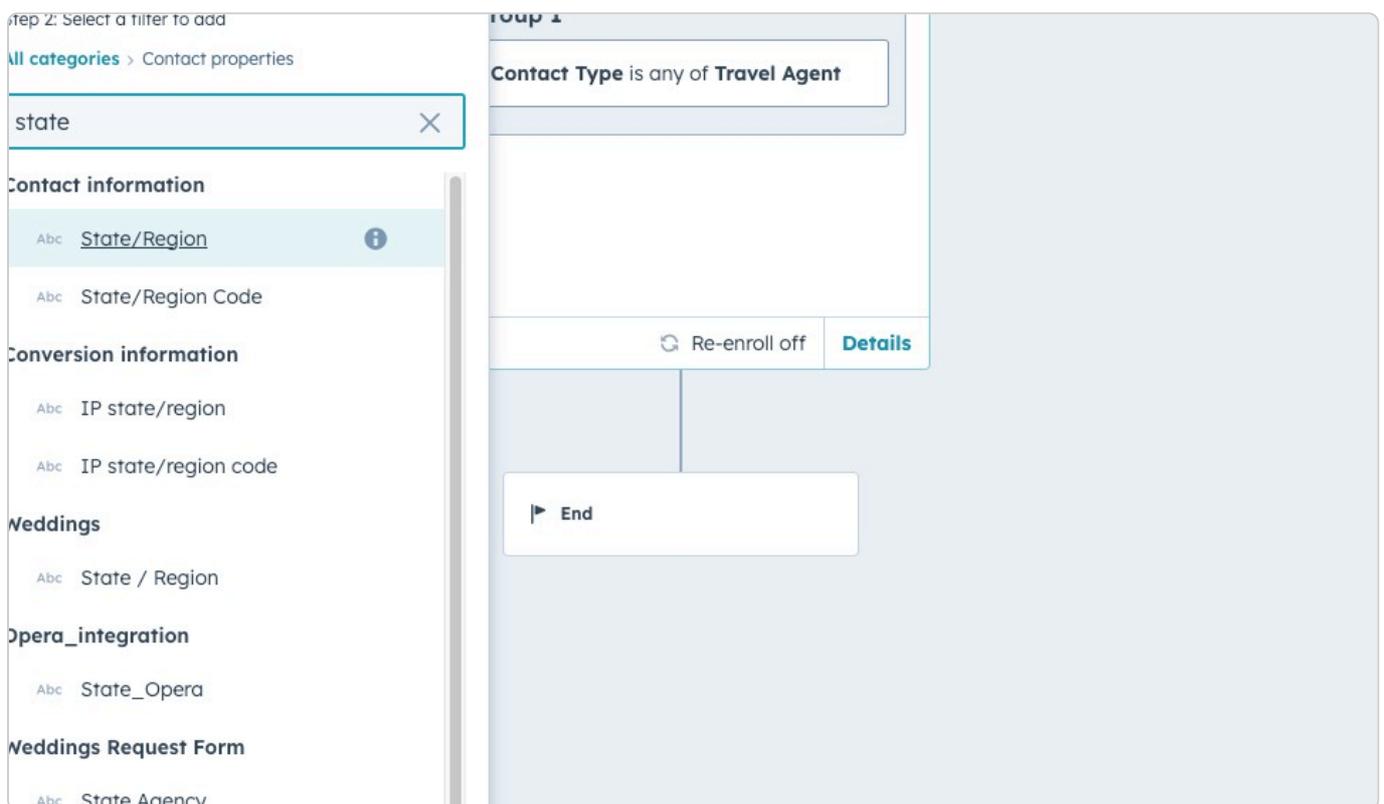
## Click on highlighted area

We need to choose Contact properties again



14

## Type State/Region

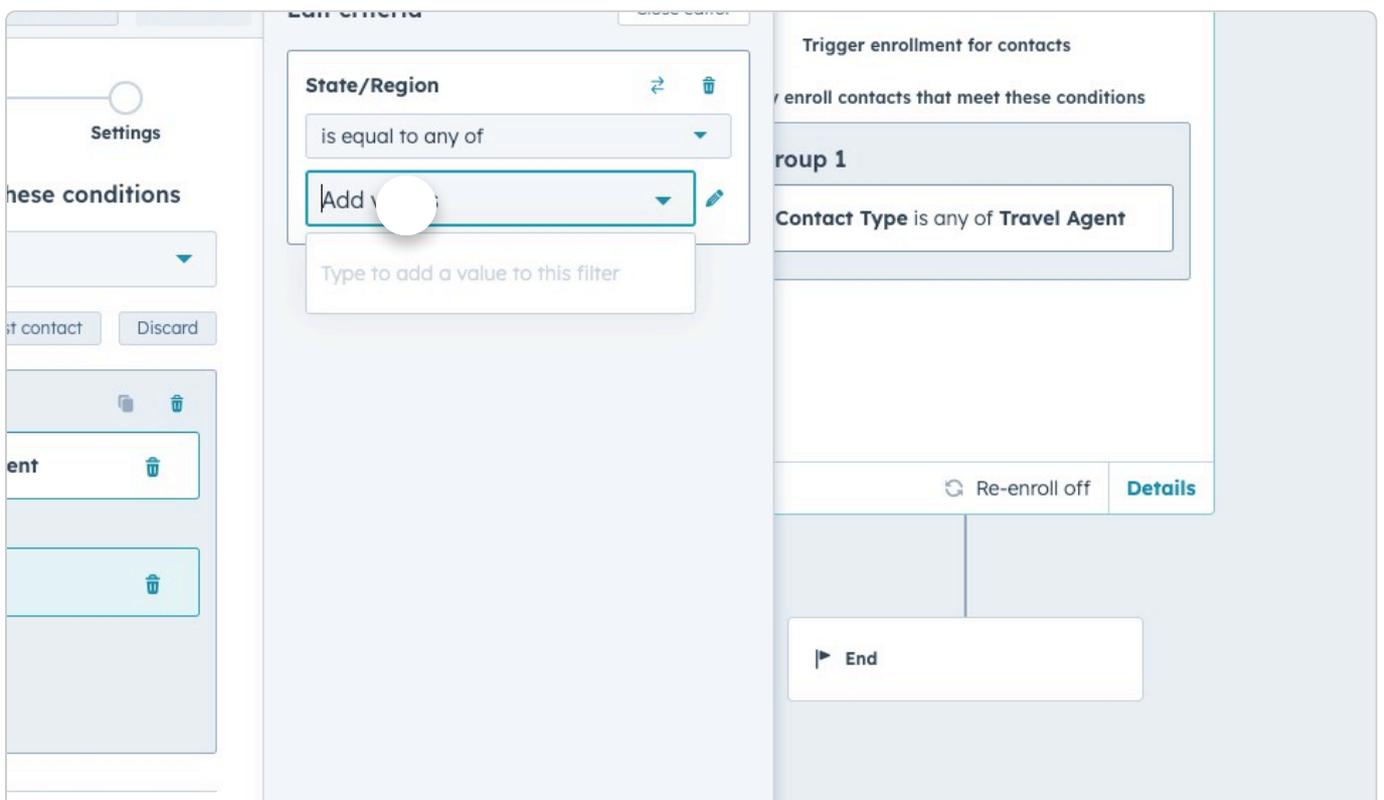


15 **Click on the property**



16 **Click on Enter value**

Here we need to add the States where we are in charge, we have to include the description and the abbreviation e.g. ( Colorado, CO )



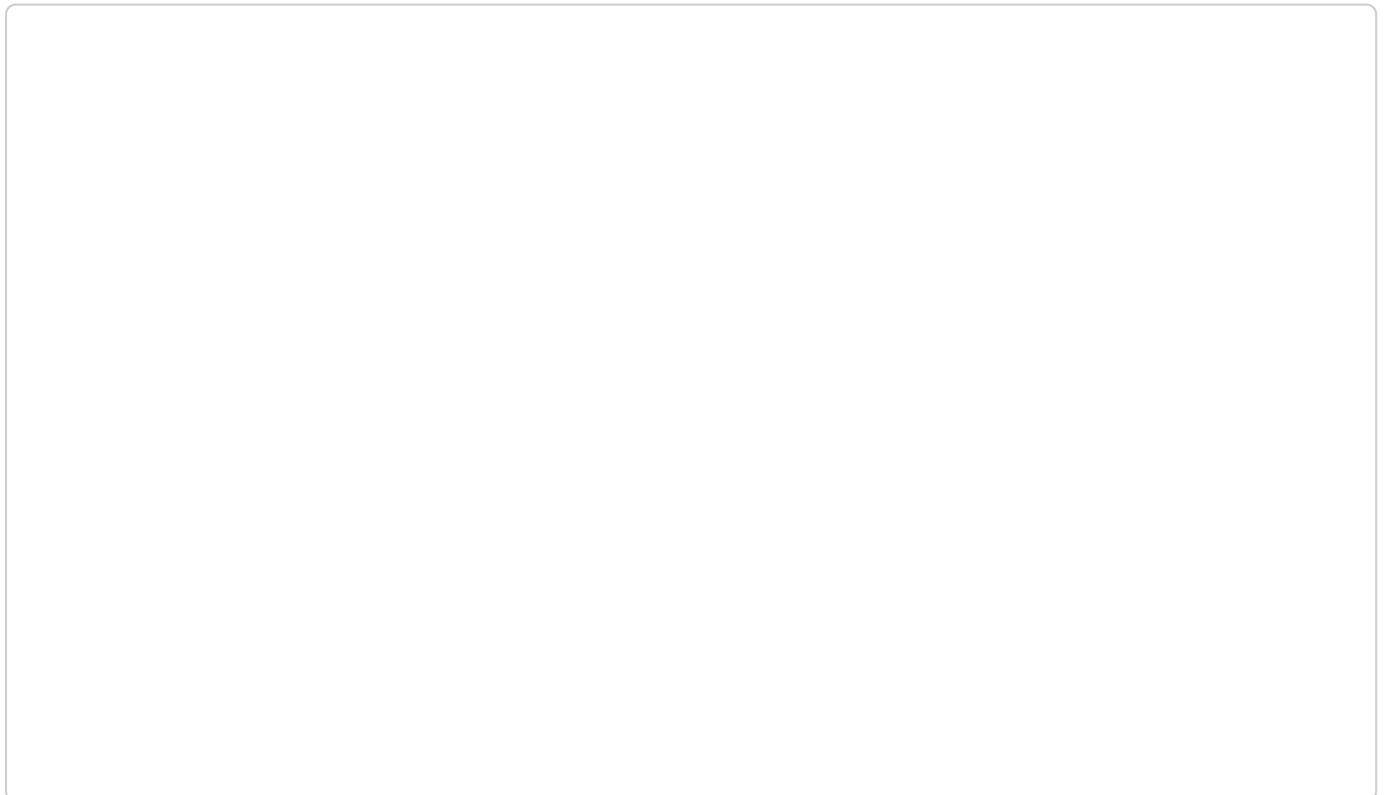
17

## Click on Add criteria

The screenshot shows a search criteria configuration interface. At the top, there are two buttons: "Test contact" and "Discard". Below this, a section titled "Step 1" contains two criteria cards. The first card reads "Contact Type is any of Travel Agent" and the second reads "State/Region is equal to any of COLORADO or CO". Each card has a trash icon on the right. Below the cards is a button labeled "+ Add criteria" with a white circular highlight over it. Below this section is an "OR" separator and another "+ Add criteria" button. On the right side of the interface, there is a vertical panel with a "Re-enroll of" button and an "End" button with a play icon.

18

## Click on highlighted area



**19 Type contact owner**

A large, empty rectangular box with a thin grey border, intended for the user to type the contact owner's name.

**20 Click on the property**

A large, empty rectangular box with a thin grey border, intended for the user to click on the property.

21

**Click on highlighted area**



22

**Type your name**



23

**Click on highlighted area**



24

**Click on Next**



25

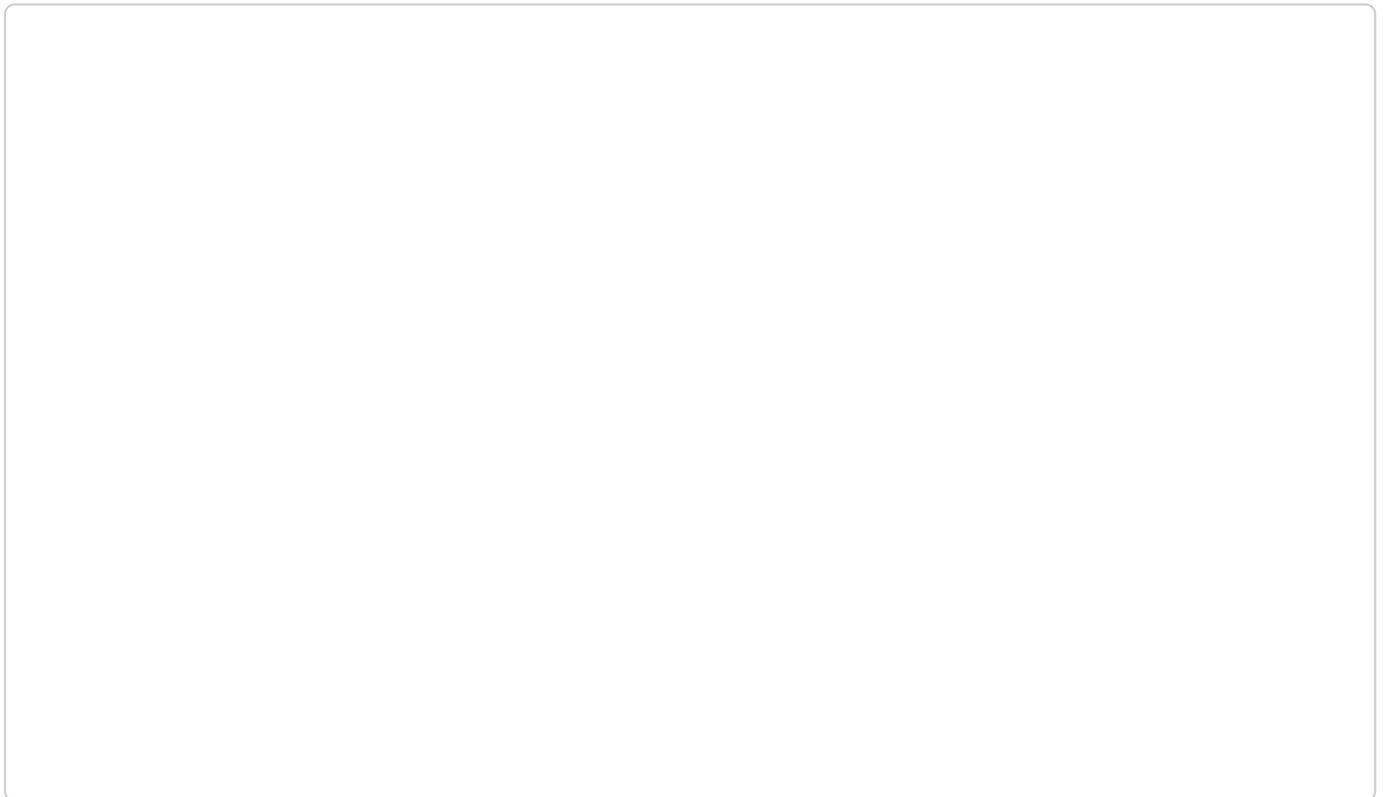
## Click on highlighted area

Here we can turn on the re-enrollment for further interactions



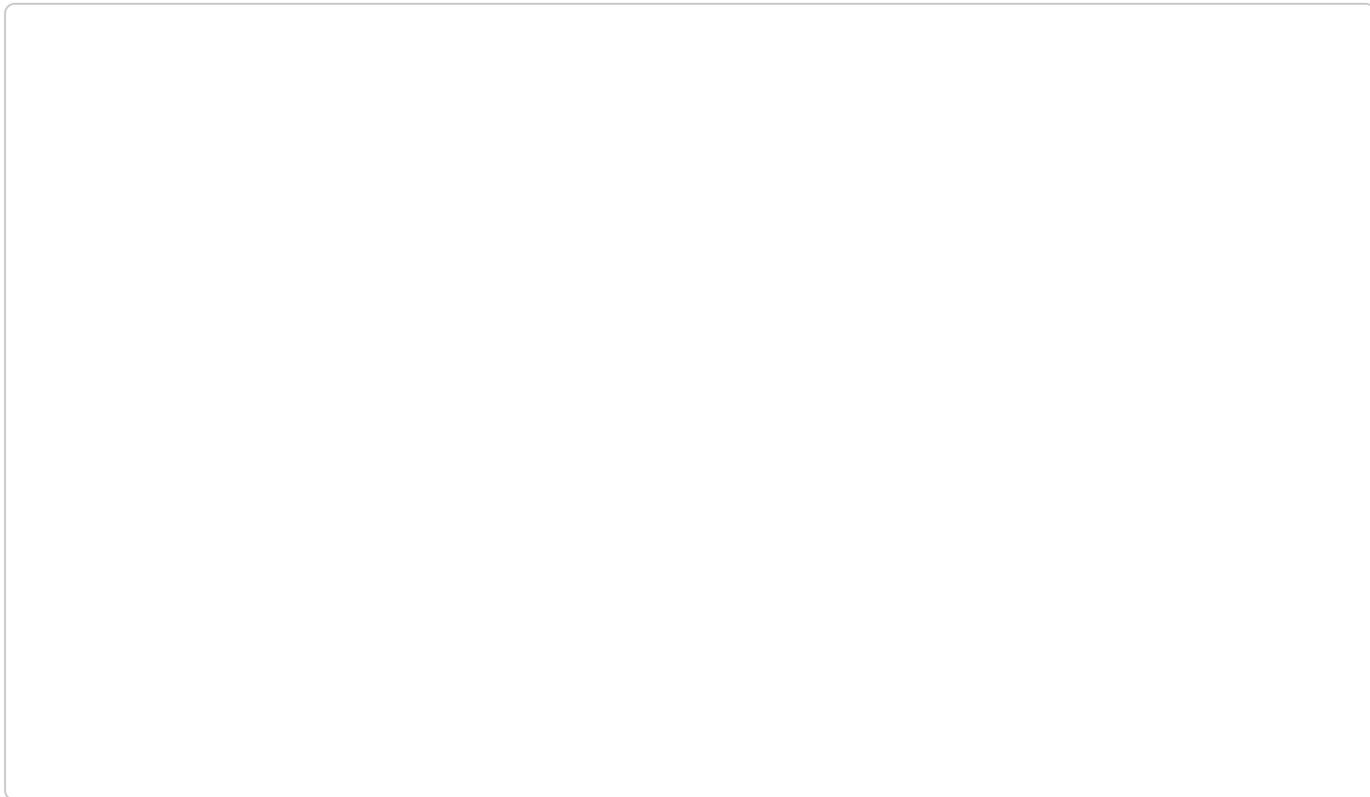
26

## Click on Save and continue



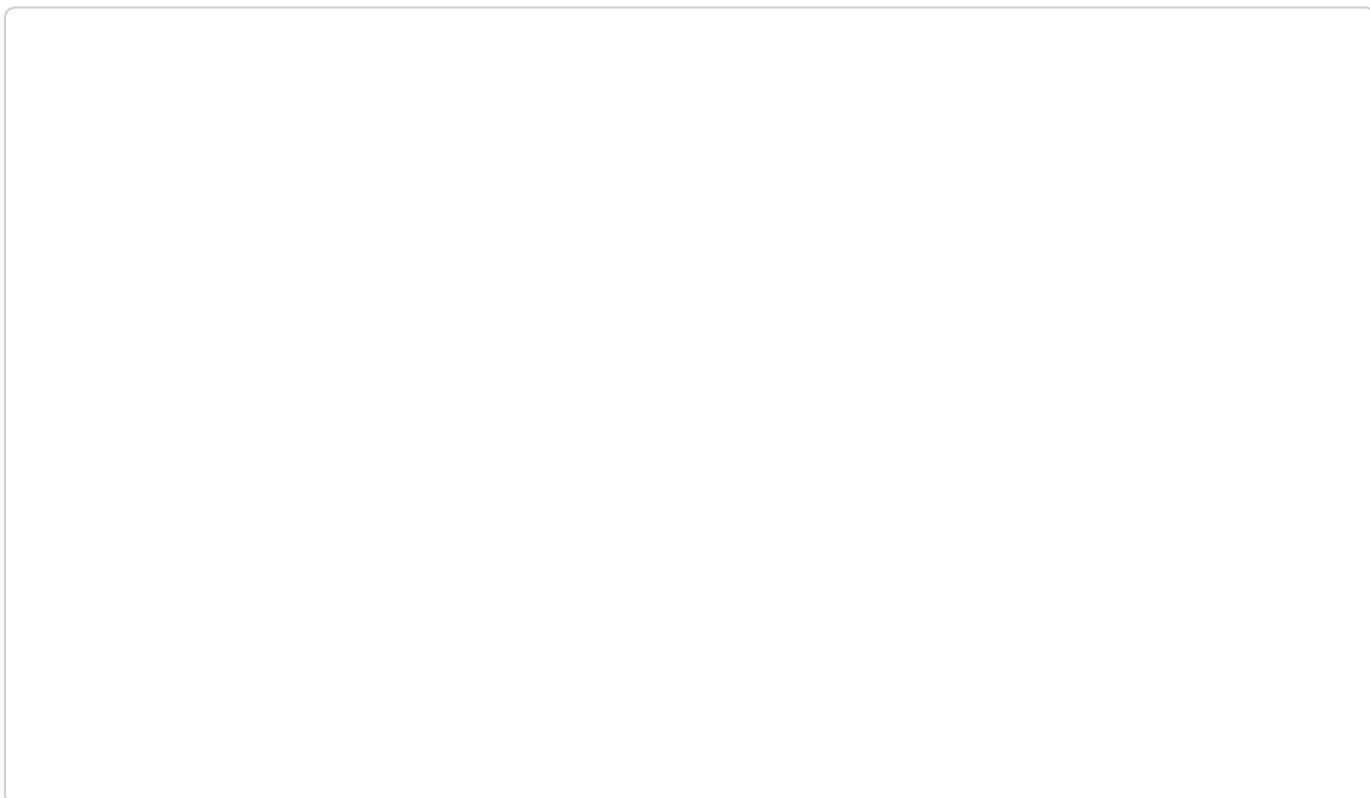
27

**Click on Communications**



28

**Click on Enroll in a sequence**



29

## Click on highlighted area

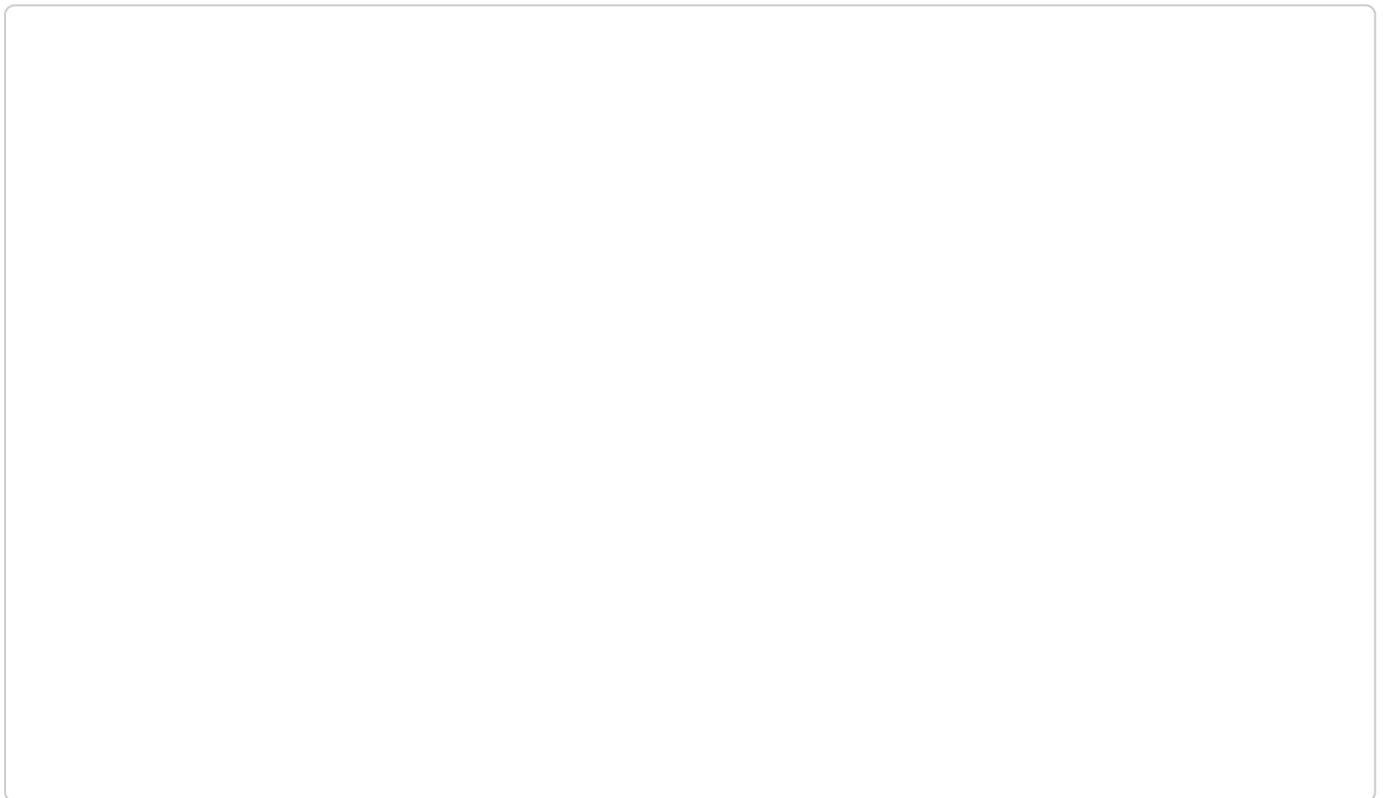
We need to choose the sequence



30

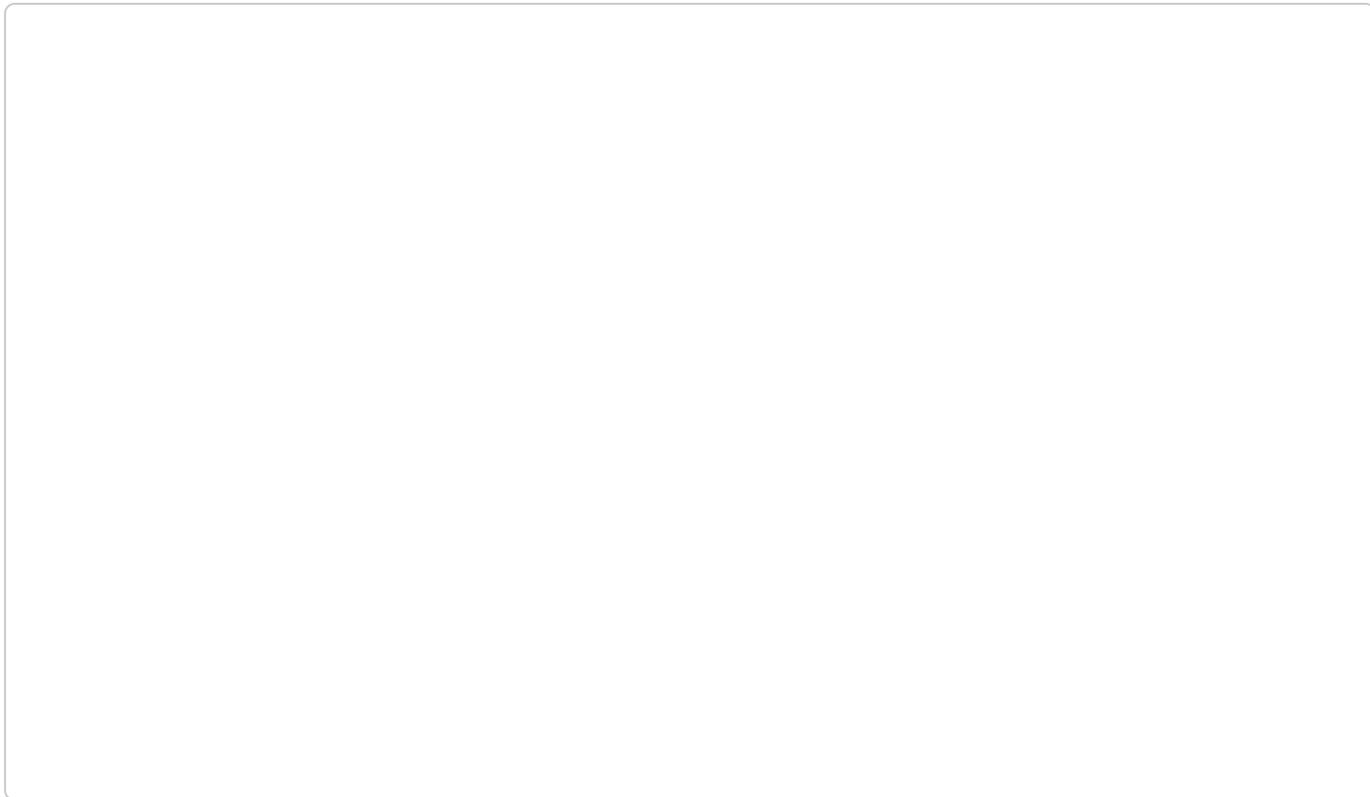
## Click on highlighted area

Enable this option if you want that your email to be delivered on the contacts time zone



31

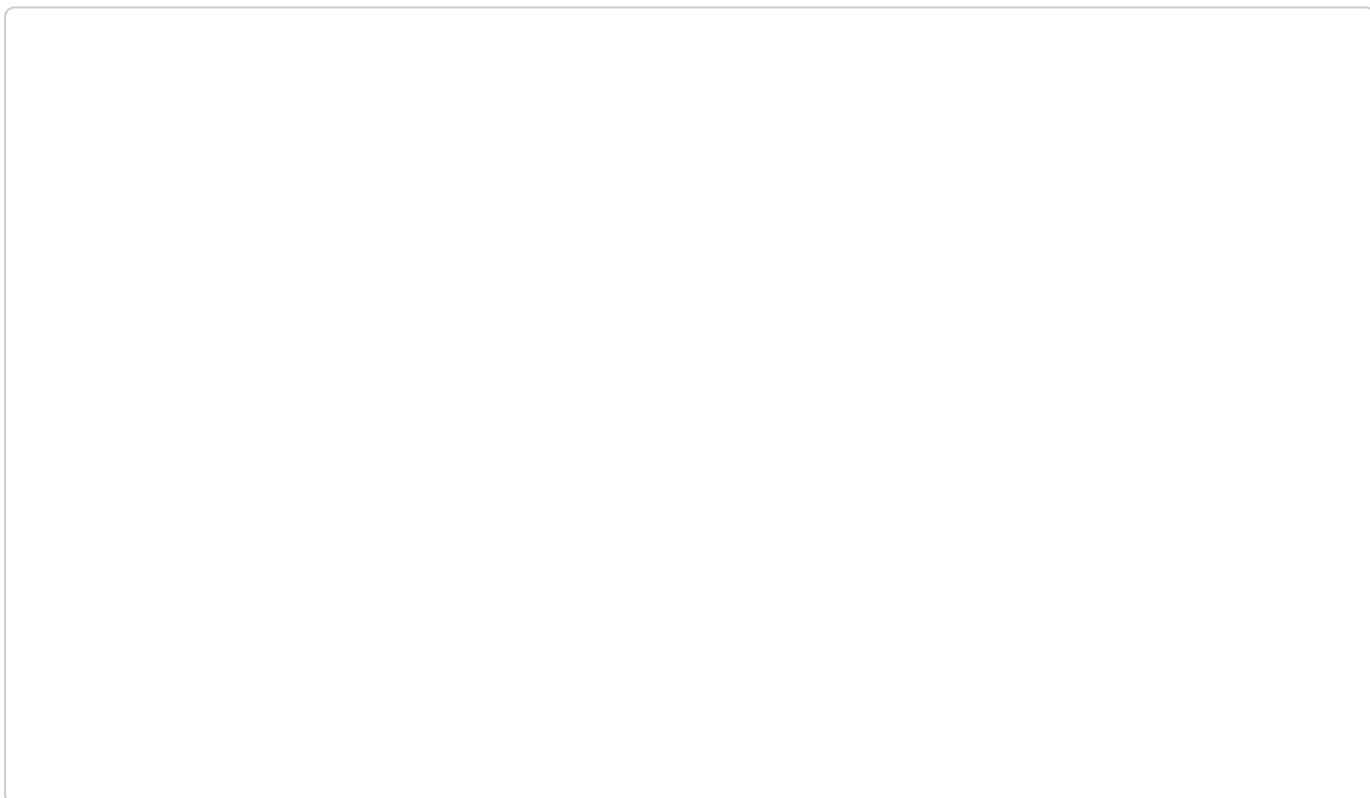
**Click on highlighted area**



32

**Click on highlighted area**

Select Specific user and then you need to search for your user name



33

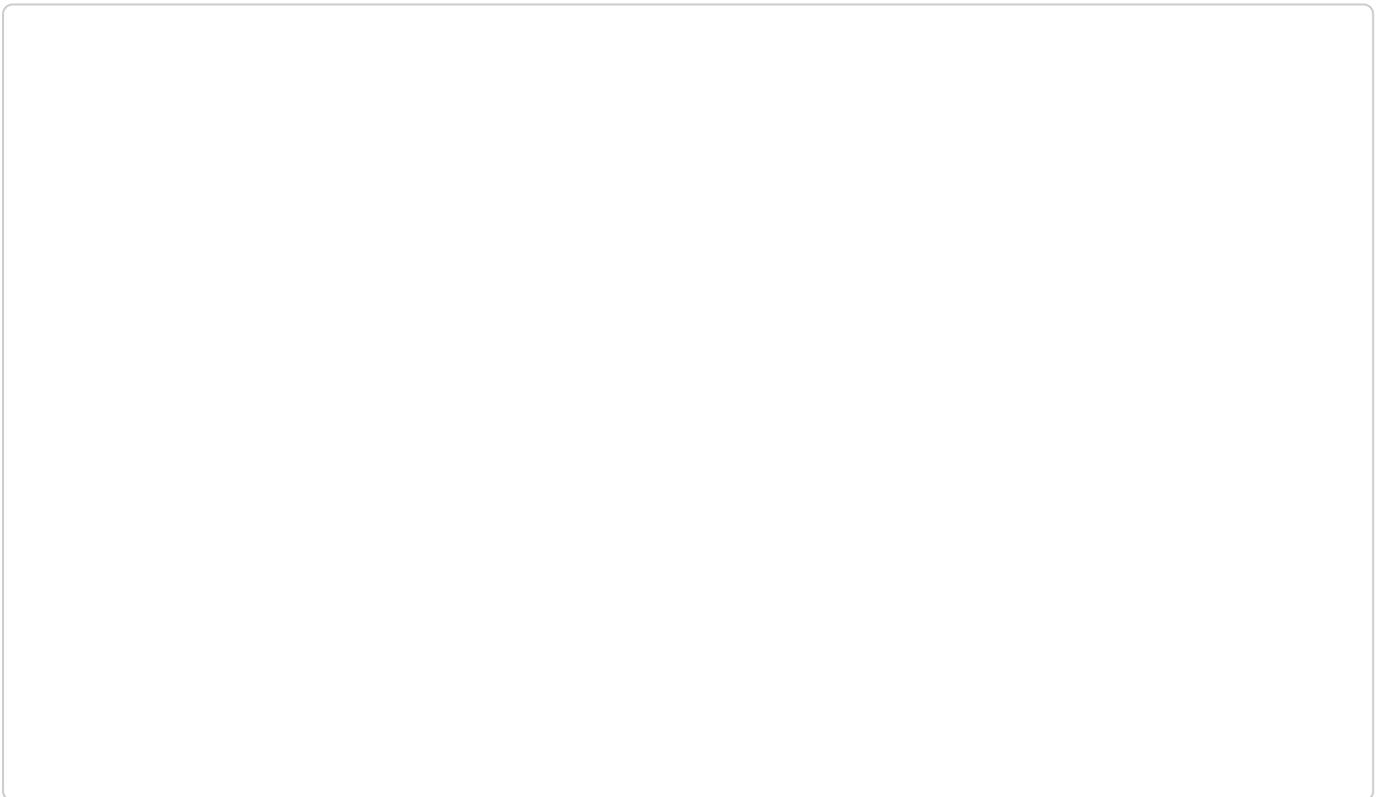
**Type your name**



34

**Click on highlighted area**

you need to choose the one with the domain @thepalacecompany.com



35

**Click on Save**



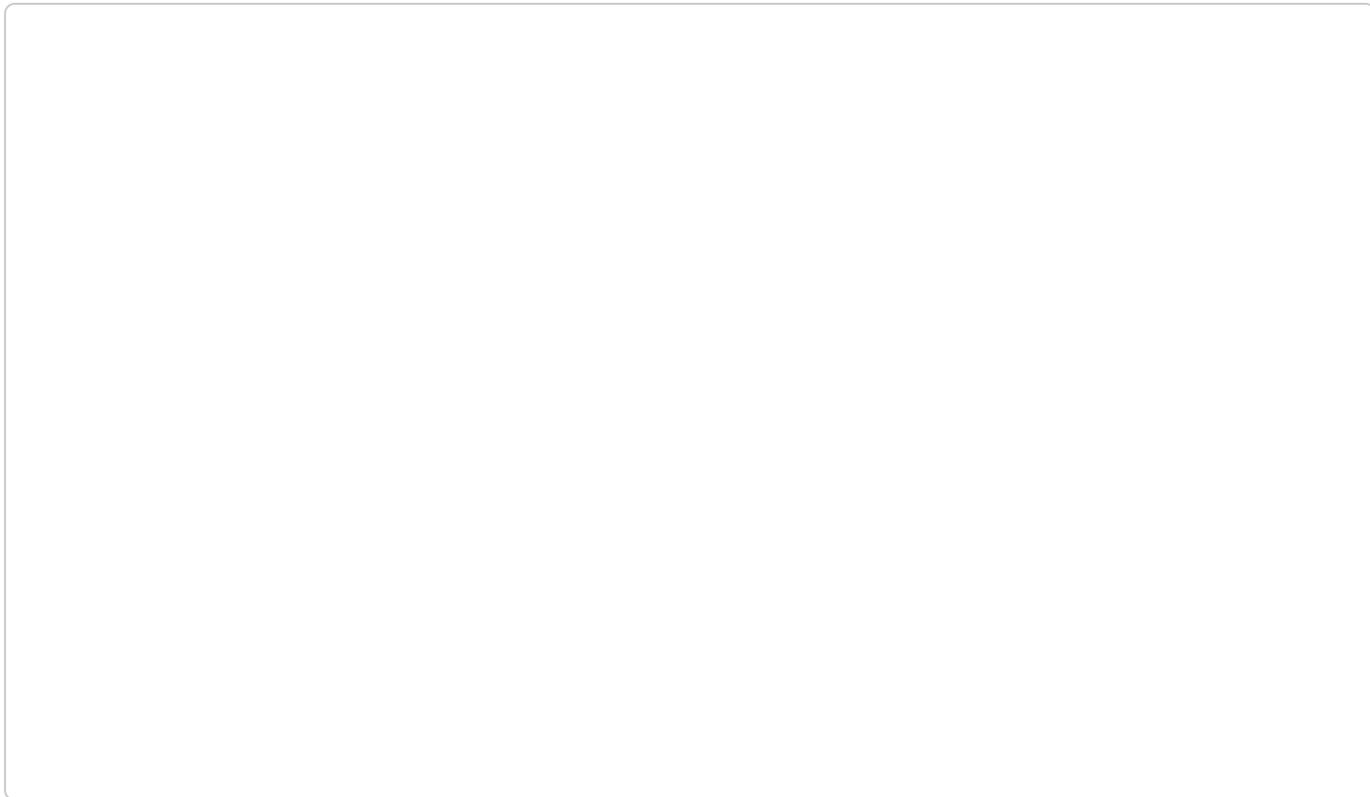
36

**Click on Review and publish**



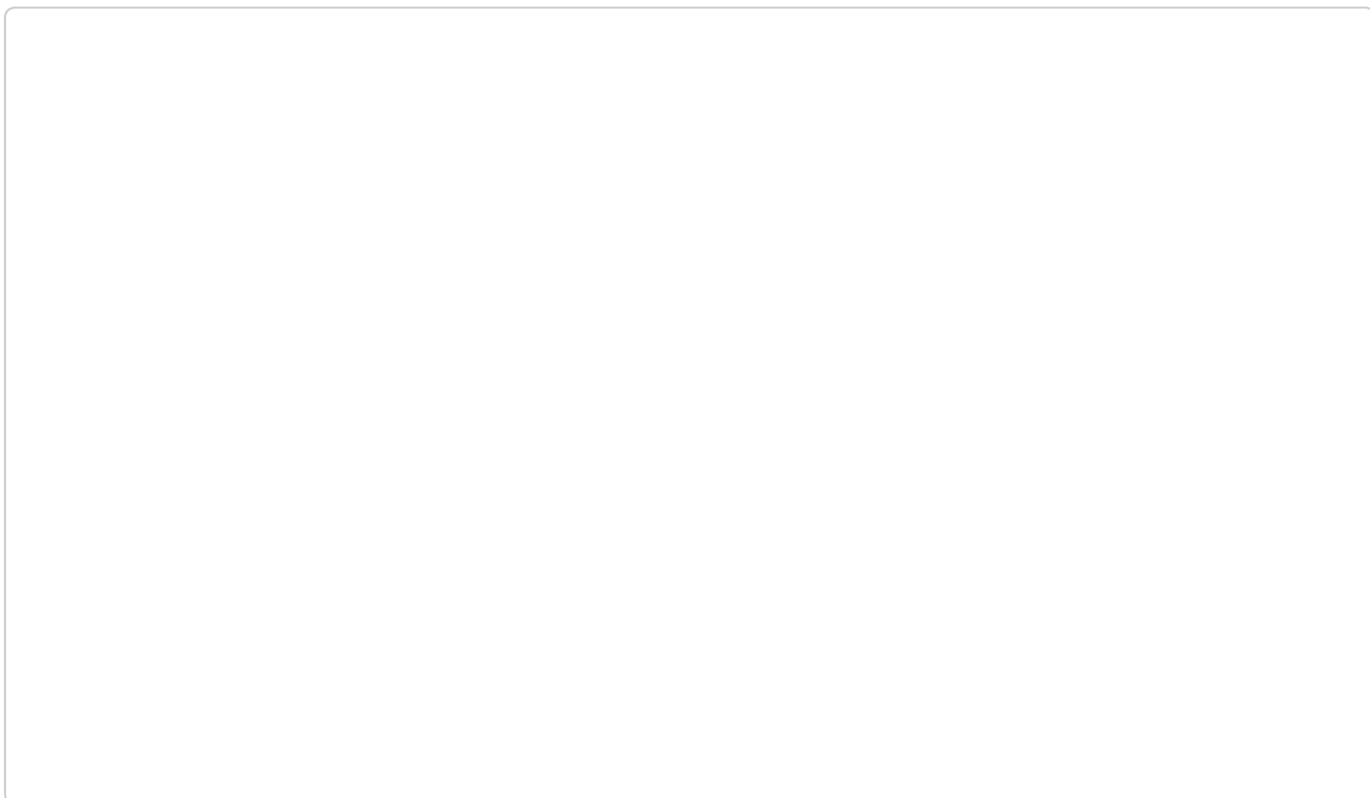
37

**Wait until Hubspot finish to calculate**



38

**Click on highlighted area**



39

**Click on highlighted area**



40

**Click on highlighted area**

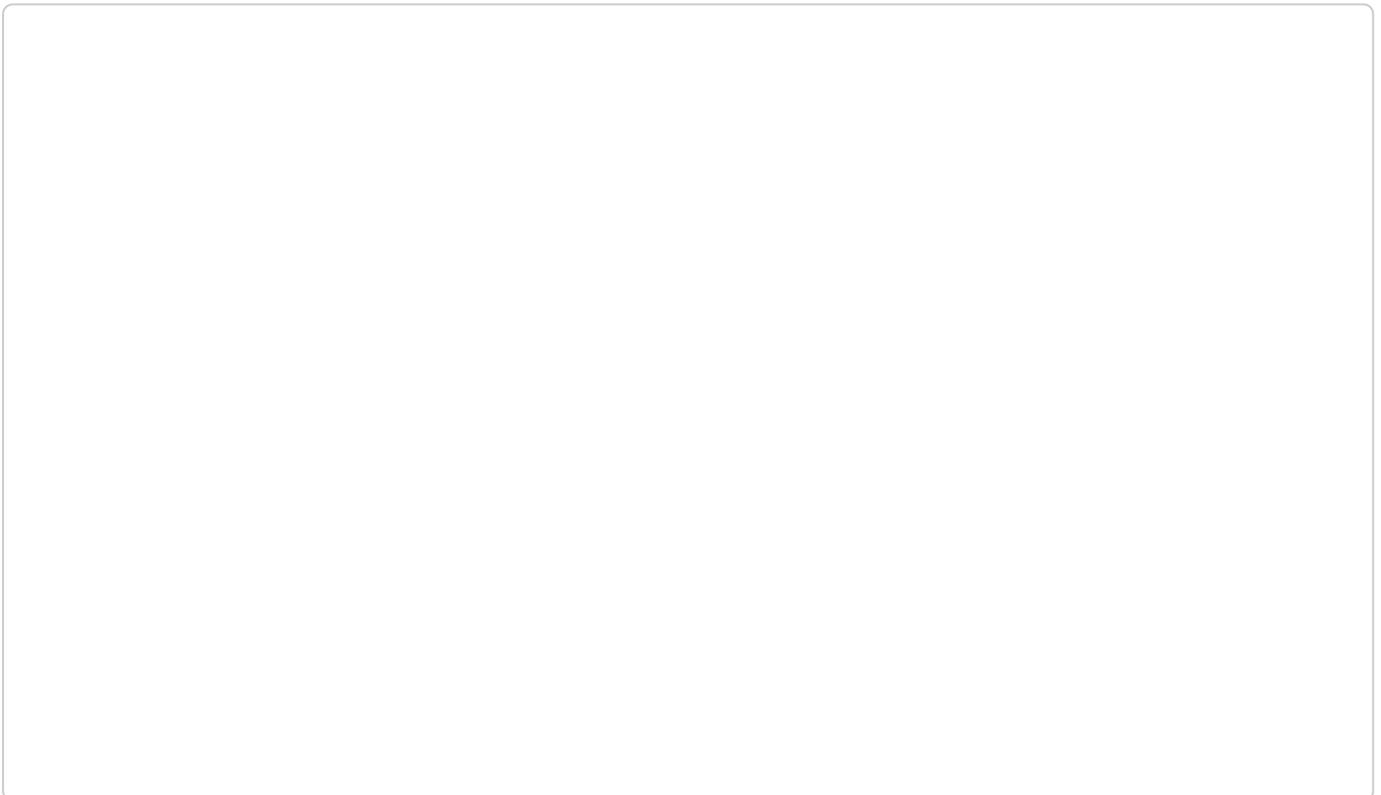


**41 Click on highlighted area**



**42 Click on Turn on workflow**

Once we click on that button our workflow is now working and enrolling our agents into the sequence

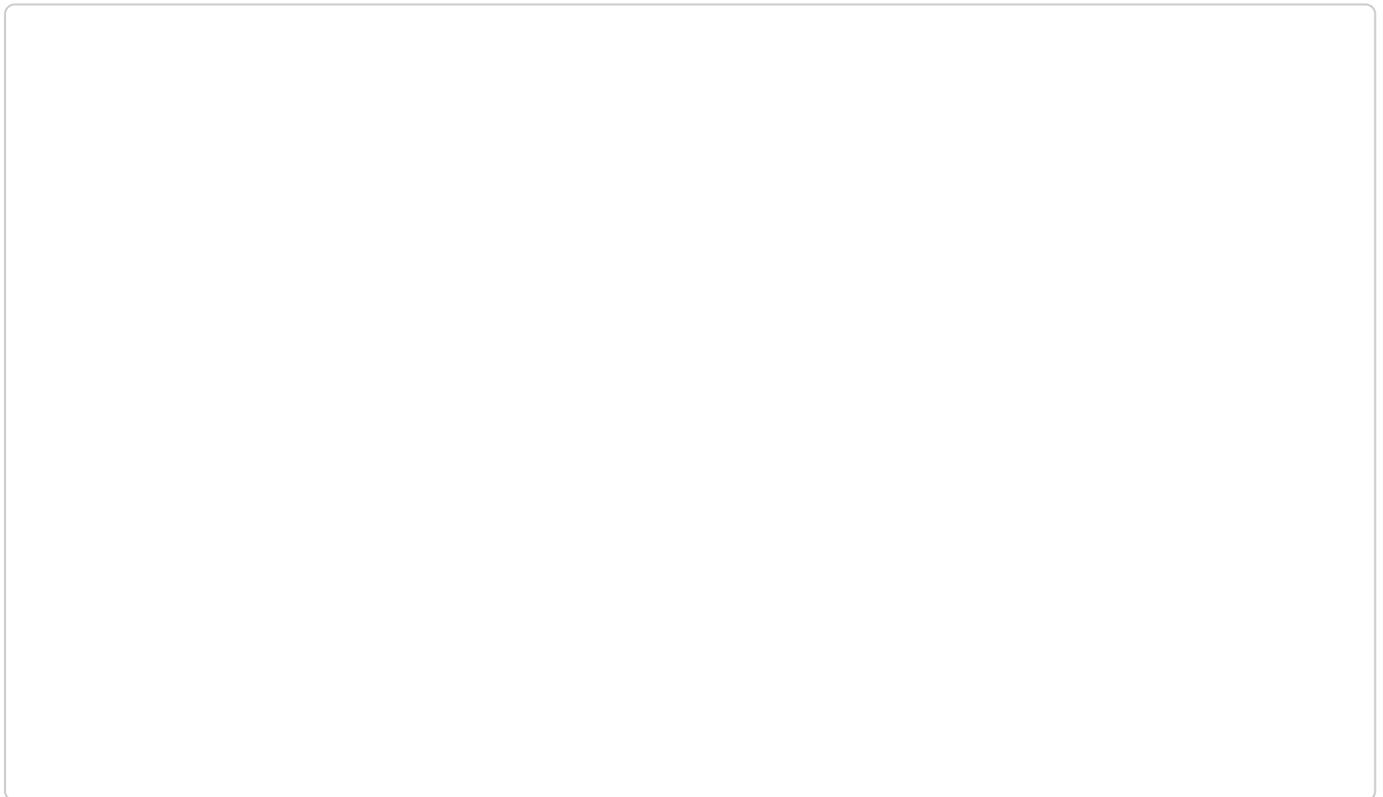


### 43 Turn Off Workflow

If we want to change the sequence, or modify the workflow we need turn it off



### 44 Click on Enroll in a sequence step



45

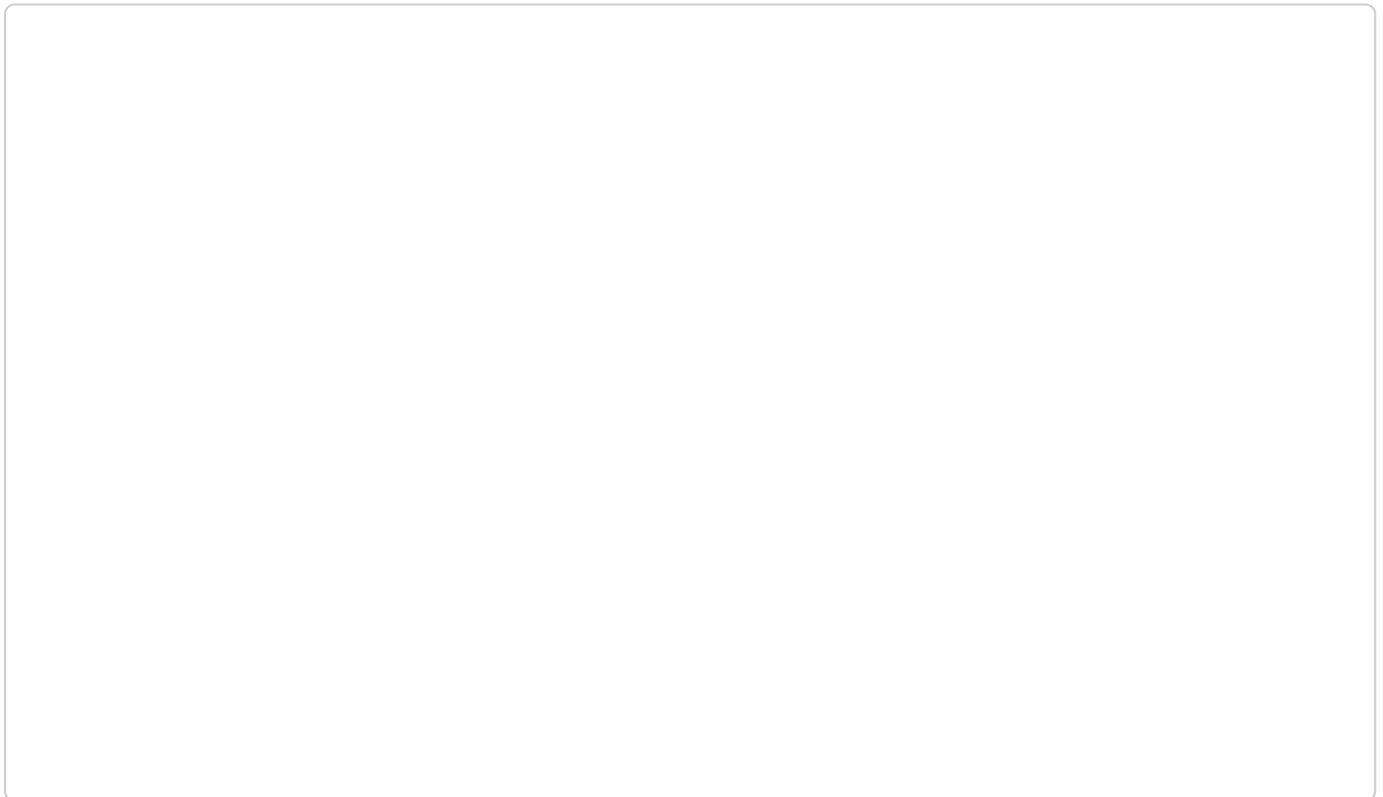
## Click on highlighted area

We only need to change the name of the sequence



46

## Click on Save



47

## Click on Review and publish

And now we are ready to enroll our agents into another sequence

