Activating Agentic CRM for your tribe

Switching the add-on on for one tribe, adding a card if the tribe does not have one, and what happens on the first bill.

Any user who can edit the tribe's billing settings can switch Agentic CRM on for that tribe. Once it is on, every team member in the tribe can use sequences straight away.

Switching it on

1. Open the tribe's CRM. On the dashboard, select **Activate Agentic CRM** in the strip at the top. You can also select **Sequences** in the menu and choose **See what's included**, or select **Start sequence** on any contact.
2. Read what is included and the price, then select **Activate**.
3. If the tribe already has a card on file, that is all: the add-on is active and the sequences pages open.
4. If the tribe has no card, the dialog asks for one. Enter the card number, expiry and CVC and select **Save card and activate**. The card details go straight to Stripe, our payment provider, and are not stored by Gorilla Dash.

> **THE CARD IS THE TRIBE'S, NOT YOURS**
> The card you add here becomes the tribe's primary payment method, and every tribe invoice charges it from then on, not just Agentic CRM. Use the tribe's business card, not a personal one. You can change cards later under the tribe's Billing menu, Payment Methods.

What happens next

- Nothing is charged on the day. The first Agentic CRM fee is billed with the tribe's monthly usage at the end of the month, and appears as a line on the tribe's invoice.
- The fee is $50 for the whole tribe each month, whether one rep uses sequences or ten. Usage of other features, such as email sends or text messages sent by sequences, is billed as usual.
- The tribe's Billing dashboard shows Agentic CRM in its own box, marked **Enabled**.

If your organisation has already enabled it

When your organisation has switched Agentic CRM on for every tribe, your tribe is covered by the organisation and pays nothing itself. The offer does not appear, the sequences pages simply open, and the tribe Billing dashboard shows the package as **Covered by your organisation**. If your tribe also holds the package itself, it stays switched on but is not charged while the organisation pays; select **Cancel package** if you would rather the tribe did not carry it on when the organisation stops. **Resume package** is not offered while the organisation has the package booked beyond the end of the current month. If your organisation has taken Agentic CRM for every tribe from a later month, the box on the Billing dashboard shows **Your organisation covers this from a later month** and does not offer **Activate**. A tribe that already holds the package can still cancel it in the meantime. Whether the organisation's cover is running now or starts later, any sequence still running is paused as soon as neither your tribe nor your organisation holds the package.

When your organisation stops Agentic CRM for every tribe, the box shows **Organisation pays until** and the last day of its cover instead. In the last month of that cover, a tribe billing user can select **Activate** and then **Activate for this tribe**, so the tribe carries on from the next month at its own monthly fee and its sequences are not paused. Nothing is charged on the day, and the tribe is first billed at the end of that next month.

Cancelling

Open the tribe's Billing dashboard and, in the Agentic CRM box, select **Cancel package**. The add-on keeps running until the end of the current month and that month is billed, unless your organisation is paying for it; from the next month it is off and the sequences pages return to the offer. Any sequence still running for a contact is paused when the package ends, so nothing is sent for a tribe that has stopped paying. If you change your mind before the month ends, select **Resume package** and nothing is interrupted. While your organisation has the package booked beyond the end of the current month, whether its cover is running now or starts later, the paragraphs above describe what cancelling does instead.