Building a sequence

Creating a sequence in the organisation or a tribe: the step types, delays, copy variants, personalisation mode, sharing and the settings that govern sending.

A sequence is a template: the steps every contact will receive, in order, with the delay between them. The organisation builds sequences under its CRM and shares them with tribes; a tribe can build its own. Nothing is sent when you build a sequence - sending starts only when a rep starts it for a particular contact.

Creating one

1. Select **Sequences** in the CRM menu, then **New sequence**.
2. Give it a name and a short description. The description shows on the list and in the dialog reps choose from, so say who it is for.
3. Add steps in the order they should happen. Each step has a type, a name, and the number of days after the previous step.
4. Set the personalisation mode, sharing and sending settings described below.
5. Set the status to **Active** when it is ready. A sequence must have at least one step before it can be turned on.

Step types

Step	What happens	What you write
Email	Sent from the rep's own connected mailbox, threaded onto the first email so the contact sees one conversation	Subject and body
Text message	Sent from the tribe's SMS number. Offered only when the tribe has a number	The message
Call	Creates a call task for the rep and waits until it is marked done	A task title and notes on what to say
LinkedIn	Creates a to-do task holding the message for the rep to paste into LinkedIn, and waits until it is done	A task title and the message
To-do	Creates a general task and waits	A task title and notes
Wait	Pauses for the number of days set	Nothing

Delays count from when the previous step happened, not from the start. A call step's delay counts from the moment the rep marks the call done. A step that was switched off for a contact never resets the count: the step after it still counts from whichever earlier step happened last.

Merge fields and prompts

Write a contact's details into the copy with the merge-field chips under each editor, such as {{contact.first_name}} and {{company.name}}. Anything else you put in double braces, such as {{specific

trigger}}, is a **prompt**: a gap the rep must fill in for that contact before the sequence can start. See Merge fields and prompts for the full list.

Copy variants

An email step can carry named variants - alternative subject and body pairs. When a rep starts the sequence they pick the variant that fits the contact. Use them for the same touch aimed at different roles or situations rather than building several near-identical sequences.

Personalisation mode

- **Send as written.** Steps go out as the template says, once the rep has filled any prompts.
- **Review every step.** The rep must read and mark every step **Ready** before the sequence can start. Use this for highly targeted outreach where every message should be checked.

Sharing

An organisation sequence can be shared with **all tribes**, **selected tribes**, or kept unshared. A tribe sees shared sequences on its own Sequences page marked "Shared by organisation", can start them for contacts, but cannot edit them; it can select **Copy to my tribe** to get its own editable version. The organisation sees every tribe's own sequences too, can pause them, and can select **Copy to the organisation** to turn a good tribe sequence into a template for everyone.

Sending settings

Setting	What it does
Send window	Emails and texts go out only between these times in the tribe's timezone; a step that comes due outside the window waits for it
Business days only	Nothing is sent at the weekend
Daily send limit	The most sequence emails one rep sends in a day; steps beyond it wait for tomorrow
Skip on recent activity	If the contact has been in touch within the number of days set, the step is held rather than sent on top of a live conversation
Re-enrolment cooldown	How many days must pass before the same contact can be put into this sequence again
Stop on opportunity / meeting	End the sequence when an opportunity is created or a meeting booked for the contact
Marketing stream	Marks the sequence as commercial email. Every email then carries the unsubscribe link, and the rep must confirm consent when starting it

PAUSING A SEQUENCE PAUSES EVERY RUN OF IT

Setting a sequence's status to Paused stops the next step for every contact currently in it, across every tribe it is shared with, including an email or text that was already waiting to go out. Setting it back to Draft, for example to edit it, holds every contact in exactly the same way. While a sequence is Paused or in Draft, selecting Resume on one contact is refused with a message saying so, because nothing could send. Setting it back to Active picks them up again: a step that came due while the sequence was paused goes out within a minute or so, still inside the send window and the daily send limit. Deleting a sequence ends every run for good.