Seeing who is in a sequence

The contacts in each sequence, what has been sent to each and what is still to come, how to change a contact's upcoming steps, and the marks on the contacts list and the contact profile.

There are three places to see sequences at work: the sequence itself, the contacts list, and the contact.

On the sequence

Select **Sequences** in the CRM menu and select a sequence's name. Its page shows the sequence details with an **Edit** button when it is yours to edit, and below that a table of every contact in it: their name, status, how many steps have gone and what is next, when it next moves, when it was started and by whom, and which mailbox it sends from. Search by name or email, filter by status, and sort by any of the dates.

The organisation's page shows the runs from every tribe, with the tribe named on each row and a tribe filter. A tribe's page shows only its own contacts, including on a sequence the organisation shared with it.

Opening one contact's run

From your team member profile, select **CRM**, then **Sequence Enrolments**. This lists enrolments for the contacts you can access in your tribe. Expand a row to view its steps and use the same edit, pause, resume and stop controls described below. Editing a contact’s upcoming steps does not grant access to edit the sequence definition.

Select the arrow at the end of a contact's row to open it. The row expands to list every step of that contact's sequence in order, with the subject of each email and where the step is up to:

- **Sent** or **Done**, with the date and time, for a step that has already happened.
- **Waited** for a wait step that has run its course.
- **Due**, with the date and time, for the step that goes next, or **Next** while its time is still being worked out.
- **Upcoming** for the steps after that, which are scheduled once the step before them has happened.
- **Task open** for a call, LinkedIn or to-do step waiting on the rep.
- **Needs filling in** beside a step that still has a prompt the rep must answer before it can go.
- **Skipped** for a step switched off, passed over when the sequence stopped, or dropped because the task it was waiting on was deleted (the step says so underneath), and **Failed** for a step that could not go, with the reason shown under it (for example, no mobile number for a text).

While the sequence is still running for that contact, each step that has not happened yet has a pencil button. Select it to change the subject, the message, the preview text or the number of days after the previous step, then select **Save**. This is the same editor as **Edit** on the contact's own page, and the list refreshes afterwards so **Next action** shows the new timing.

Above the steps are the same **Pause**, **Resume** and **Stop** controls the contact's own page has. **Pause** asks how long: 1 day, 3 days, 1 week, 2 weeks, a number of days you type, or **Until I resume it**. A pause with a length resumes on its own when the time is up, and the **Status** column shows when, for example "Paused until 26 Sep 2026, 10:00 am". While a sequence you paused is on hold, **Change pause** sits beside **Resume** so you can pick a different length without restarting it. **Stop** asks you to confirm, then ends the sequence for that contact for good. See When a contact replies, and stopping a sequence for what each one does.

> **CHANGES APPLY TO THIS CONTACT ONLY**
> An edit made here changes that one contact's copy of the step. The sequence itself, and everyone else in it, stay as they are. Editing the sequence with its **Edit** button works the other way round: it changes what contacts get from the day they are added, but it does not rewrite the steps of anyone already in the sequence, because each contact's steps are copied when their sequence starts.

If the contact has since moved to a different tribe, the row says so instead of listing the steps; open the contact and use the strip under their name.

While this page is visible, the list and the running sequence you opened most recently refresh about every fifteen seconds. Other expanded rows keep their last view; close and reopen a row to read its latest steps. Refreshes wait while you edit a step or use a run control. If repeated connection failures stop automatic updates, reload the page once your connection is working again.

On the contacts list

A contact with a sequence running shows a small sequence icon after their name. Hold the pointer over it to see which sequence, and when the next step is due or whether it is paused or waiting on a task.

On the contact

- The strip under the contact's name shows each running sequence with its controls.
- The **Sequences** card on the Automations tab lists every sequence the contact has been in, finished ones included, with every step and its outcome.

Statuses

Status	Meaning
Running	The next step is scheduled
Waiting	A call, LinkedIn or to-do step is open and the sequence is holding for it
Paused	Holding until a rep resumes it, or until the date shown for a pause with a length - the reason is shown alongside
Replied	The contact answered; the sequence has paused and the rep has a task
Completed	Every step has happened
Stopped	Ended by a rep, an opportunity, a meeting, an unsubscribe or the sequence being deleted