Starting a sequence for a contact

Putting one contact into a sequence: choosing it, personalising every step, filling prompts, picking the mailbox, and what happens once it starts.

Sequences are started one contact at a time, by a rep, from the contact's profile in a tribe. Every step is shown, filled in for that person, before anything is sent.

Starting one

1. Open the contact and select **Start sequence** at the top of the profile. The same button is on the Sequences card of the Automations tab, and on the lead pane of a call list.
2. Choose a sequence. Each shows its steps, personalisation mode and whether it is a marketing stream. If a sequence cannot be used for this contact - for example they were in it recently, or they have unsubscribed - the reason is shown in its place.
3. Work through the steps in the left column. Select a step to read it, edit the subject or message, change the delay, pick a copy variant, or switch the step off with **Included** so it is skipped for this contact.
4. Fill in every highlighted prompt. A step that still has one is marked **Needs filling in** and the sequence cannot start.
5. If the sequence is set to review every step, tick **I have read this and it is ready to go** on each one.
6. Choose the mailbox under **Send as**. It lists the connected mailboxes on this tribe; if yours is not there, connect it first (see Connecting your mailbox to the CRM).
7. For a marketing stream, confirm the contact has consented to marketing email. The unsubscribe link is always included on those.
8. Select **Start sequence**.

The unsubscribe link

Sequence emails are personal, one-to-one messages from a rep, so by default they carry no unsubscribe footer. Your organisation can allow reps to leave the footer off under CRM Settings, Email; when that is on, the start dialog shows an **Include unsubscribe link** switch. Sequences marked as a marketing stream always carry the link whatever the switch says, as does any sequence started automatically rather than by a rep.

What happens once it starts

- The first step is scheduled straight away, within the sequence's send window. Sequences are checked every minute, so a step due now goes within a minute or two.
- Emails are sent from the chosen mailbox and threaded so the contact sees one conversation. Each is recorded on the contact's Communications tab.
- Texts are sent from the tribe's number. Call, LinkedIn and to-do steps create a task for the rep and wait for it; see Call and LinkedIn steps.
- Each following step is scheduled from the moment the previous one happened, honouring the daily send limit and the recent-contact hold set on the sequence.

- A strip under the contact's name shows the sequence, where it is up to and what comes next, with Edit, Pause and Stop; see When a contact replies, and stopping a sequence.

THESE ARE REAL SENDS FROM YOUR MAILBOX

Once started, emails go out from the rep's own account and appear in their Sent folder. Read every step before you start. If a step is wrong after the sequence has started, use **Edit** on the strip to change anything that has not gone yet.