# Advanced Sequencing: Common Questions

Advanced Sequencing · https://learnpcr.pcrecruiter.net/site/docs/advanced-sequencing/common-questions/

## Activating Advanced Sequences

- **Q. Can I connect multiple Rollup lists to 1 Sequence?**
- **A.** No, Sequences can only be linked to 1 Rollup list at a time. If you want to use the same Rollup for another Sequence the previous one must be ended first.
- **Q. Can I connect multiple Sequences to 1 Rollup List?**
- **A.** No, Rollup Lists can only be linked to 1 Active Sequence at a time. If you want to use the same Rollup list for another Sequence you will need to duplicate the Rollup list and activate a new Sequence from the previously used Template.
- **Q. Can I set my timezone settings for a different timezone than my current one?**
- **A.** No, the timezone is to be set to the primary user's timezone. This is used for converting activities and sequence actions to the correct times.
- **Q. Can you start a Sequence with no names in the Rollup List?**
- **A.** Yes, you can link an empty Rollup list to a Sequence when activating it. As you add records to the Rollup List, they will begin the Sequence.
- **Q. Can I move someone backwards in a Sequence?**
- **A.** No, however, you can use the "jump to branch" condition and select the branch you are currently in to have them restart that branch from the beginning. (Note that Form Letters in the first step will not be resent due to duplicate checking. Emails that are not in step 1 can be resent, however, this is dependent upon your default settings for resend checking, for more information please reach out to the support team).

## Sending Automatic Emails/Texts

- **Q. Can I resend the same email through multiple steps when attempting to do a drip campaign?**
- **A.** No, however, you can create a different Form Letter by copying and pasting the same email text. You will need to create one Form Letter for each instance you would like to send.
- **Q. What should I set the rate limiter at to prevent my emails/texts from being marked as spam?**
- **A.** There is not a specific number we can recommend to set this at as each email provider has different sending criteria. It is always recommended that you use a bulk email provider if you are not using the rate limiter or need to send out a large amount of emails in a short period of time. For additional information on emailing/texting limits click HERE.
- **Q. Why did my automatic emails stop sending before I reached my rate limit?**
- **A.** The rate limiter is set based on your specific email alias for all bulk messaging. If you have 2 Sequences both running with automatic emails with a limit of 250 per day this will stop sending once 250 emails have been sent between both Sequences. This number also accounts for any Email Campaigns sent from your alias on that day.
- **Q. What should I be aware of when using conditions for an automatic email?**
- **A.** When setting conditions for an automatic email step, there are a few key items to consider:
  - **When Email is Sent:** The "Email is Sent" condition will always be met first, therefore you cannot use this condition with any other conditions.
  - **When Email is Opened:** The "Email is Opened" condition should not be used in combination with any conditions except for "If no Conditions met". This includes the Link Clicked, Replied To, or Opt Out/Unsubscribed Conditions as the user will always need to open the email prior to any other actions.

- **Q. Why am I seeing 2 email opened results for each candidate?**
- **A.** Some email servers may automatically "open" or scan an email before it reaches the recipient. This can cause the system to register the email as opened, even though the recipient has not actually opened it. This will inflate your email opened results and may trigger the "Email is

Opened" condition falsely.

## Missing Names in Task List

- **Q. Why do I not see a specific Name Record on my task list?**
- **A.** Name records can be missing from the Task list for a number of reasons. Please review the below scenarios to attempt to locate the record.
  - **Is the Name record on the Rollup list connected to the Sequence?** Only name records on the connected Rollup list will show in the Sequencing Task List.
  - **Is the Sequence Active?** Navigate to the Overview tab and ensure that the toggle switch is turned on for this Sequence. Paused Sequences will not display in the Task List or the Queue.
  - **Is the Name Record in the Queue?** Check the Queue for the Name record. If the previous Task was an Automatic step or the condition had a delay, the record will enter the Queue until the next task is scheduled.
  - **Check your start/stop times and send on days.** If a Sequence is not scheduled to run at the time the record should have moved forward, it will wait until the correct time/day is met before displaying on the task list.
    - **For example:** The start/stop times for the active Sequence are 10am-2pm and send on days are set to Mon, Wed, and Friday. I complete a task on Thursday at 8am with a 5 day delay. The delay would be reached on Tuesday at 8am but the record would not appear in the next step until 10am on Wed due to the restrictions set.

## Removing and Re-adding Names

- **Q. What is the difference between the conditions "Remove from Sequence" and "Sequence is Complete"?**
- **A.** Remove From Sequence will take the record out of the Sequence and remove them from the attached Rollup list. Sequence is Complete will take them out of the Sequence but leave them on the Rollup list. If a Name Record is removed using the "Remove from Sequence" option, it may be added back to the Rollup list and reenter the Sequence where it left off. This depends on the type of step they were in previously (see next answer for specifics). If the Name was removed using "Sequence is Complete" the record remains on the Rollup but is permanently locked out of the

Sequence.

- **Q. What happens when a candidate is removed from the sequence, removed from a rollup list, or they have completed the sequence? Can they be added back to that same sequence?**
- **A.** The behavior and handling of names removed and re-added to sequences will vary depending on the specific case. Here are some common methods and their results:
  - Name is **automatically removed from a sequence and rollup due to an automatic email condition being met**, then re-added to the sequence's rollup:
    - The sequence email is ***not sent again*** and the name record is ***not re-added*** to the sequence.

      An example of this type of condition would be:
      *If email is replied to - Remove from Sequence*

      Once a condition like this has been met, you cannot add the record back into the sequence to start over.
  - Name is **manually removed from the sequence and rollup *while in the sequencing queue*** using the “remove from sequence” action, then re-added to the sequence's rollup:
    - The name ***is added*** back into the sequencing queue where they were before they were removed.
  - Name is **manually removed from a sequence via the task screen** using the “remove from sequence” action and then re-added to the sequence's rollup:
    - The name ***is added*** back to the sequence in the task they were in before they were removed.
  - Name is **removed from the *sequence's rollup* outside of the Advanced Sequencing feature** and then re-added again:
    - The name will be added back to the sequence task they were in or back into the queue depending on where they were when they were removed from the rollup

- Name is **automatically removed from a sequence due to a condition timeframe trigger** and then re-added to the sequence's rollup:
  - The name record ***is not*** added back into the sequence.

    An example of this condition would be:
    *If no conditions met in 3 days - Remove from Sequence*

    Once a condition like this has been met, you can not add the record back into the sequence to start over.
- Name **completes a sequence**, is taken off of the sequence rollup, and then re-added to the sequence's rollup:
  - The name record ***is not*** added back into the sequence.

- **Q. If I end a sequence by mistake, can I activate it again?**
- **A.** No, once the Sequence has been ended it cannot be reactivated, however, it can be used as a template and activated using the same Rollup list.

## Invalid/Missing Info

- **Q. What happens if I have a sequence step of an automatic email or automatic SMS but I have multiple names on my rollup list without an email address or cell phone number?**
- **A.** A missing/invalid information task will be created for each name. These cannot be corrected in bulk. You will have to go into each task to retry after an email address or cell phone number has been added to the name record, remove them from the sequence, or navigate them to a different step.

## SMS Error Tasks

- **Q. Why am I seeing an SMS error task even though I am connected to RingCentral and authenticated properly? How do I get rid of these errors?**
- **A.** There are a few reasons why you might see SMS error tasks in sequencing

- A name record on your list does not have a valid phone number in the field you have selected to send to. Before adding a name to a sequence rollup you will want to ensure that the field you are sending to is not empty, only has 1 phone number in the field, and it does not contain text values.
- A name record on your list has an international phone number and your RingCentral account is not permitted to send SMS to international numbers.
- The phone number you are sending to has blocked your messages.

When viewing these error tasks you have the options of retry all or remove all from sequences. The remove all from sequences option will get rid of the error and remove those Name records from the sequence rollups. If you want to review the numbers that are in this error task before removing or retrying you can view this from the Sequence Column of the Rollup List connected to the Sequence.

## Editing Sequences

- **Q. Can I edit an active Sequence?**
- **A.** Yes, active Sequences can be edited but you will need to pause the Sequence first. Adjustments made to the steps will only affect new records that enter that step. Conditions will update for records in that step but not any names in the queue.
- **Q. Does editing the template change an activated Sequence?**
- **A.** No, editing the template does not affect any active Sequences which came from that template. A template is only for the initial design of the workflow. Once a Sequence is activated, it operates independently of the template. This is also true when deleting a Template.
- **Q: What's the difference between editing a template and editing an activated sequence?**
- **A.** Templates can be fully edited with no restrictions. Active Sequences have specific limitations when making changes.
  - **Template:** When working with a template, you have complete flexibility to build and modify the steps, branches and conditions as you need.

- **Activate:** Once activated, you can no longer delete steps that have been saved and are part of the active workflow, you can only disable them. You can also add new steps or reenable them if they were previously disabled. Deleting is restricted once the sequence is active to preserve the integrity of past actions and records.

## Common Template Errors

After clicking the check for problems button when editing the steps and conditions, you will receive a notification that the Sequence is ready to start or an Error message. Below are the most common error messages and how to fix them.

- **Using an invalid Condition "Continue to Next Step".**
  - The condition cannot be set as "continue to next step" if no additional steps follow. Change the condition to "Remove from Sequence", "Sequence is Complete", or "Jump to Branch".
- **The Step [[Step Name]] in Branch [[Branch Name]] is never referenced and unused.**
  - No condition was set to navigate to that step and therefore the step will not be executed. Make sure to add a condition to reach this step to correct this.
- **The branch named Branch 2 is never referenced and unused.**
  - No condition from Branch 1 was set to jump to Branch 2 and therefore the branch cannot be reached. Make sure to add a "Jump to Branch" condition to Branch 1 to correct this.
- **Selected Form Letter is already in Use in a different step.**
  - The same Form Letter cannot be used multiple times in the same Advanced Sequence. This is due to the email tracking feature for opens, replies, etc. If you wish to send the same Form Letter twice you will need to duplicate the Form Letter so that they can be tracked separately.
- **Cannot have an email/sms step immediately after the initial branch/step.**
  - You cannot have 2 back to back Automatic Email steps with a condition of "When Email is Sent". To correct this you must change the condition to "When no interaction occurs in X time" then "Continue to Next Step". (Delay must be at least 15 minutes).

- **Step [[Step Name]] in the Branch [[Branch Name]] has an unreachable condition for [[Condition]]. The "Email Sent" Condition renders this unreachable.**
    - When using the "When Email Sent" condition there can be no other conditions selected.

## Sequencing Types

- **Q. I am not sure which type of Sequencing I should use?**
- **A.** We offer both the Advanced and Simple Sequencing features. We have an article that is designed to help you determine which type of Sequencing you should use. Click HERE to access it.