Simple Sequencing: Common Questions

Simple Sequencing · https://learnpcr.pcrecruiter.net/site/docs/simple-sequencing/simple-sequencing-common-questions/

Activating Simple 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 Simple Sequence?**
- **A.** Yes, using the Jump Back action the record can be moved back to a previous step in the Sequence.
- **Q. Can I have a name record restart a previously completed Simple Sequence?**
- **A.** No, once a record has completed a Sequence they will be locked out of that Sequence and it will need to enter a new Simple Sequence to restart the process.

Sending Automatic Emails

- **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. Can I use Simple Sequencing to send back to back automatic emails?**
- **A.** No, you cannot have 2 automatic steps back to back in Simple Sequencing. To send multiple automatic emails you will need to utilize the Advanced Sequencing feature.
- **Q. What should I set the rate limiter at to prevent my emails 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.
- **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. Why am I seeing 2 email opened results for each recipient in Analytics?**
- **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.
- **Q. Can I resend the same Form Letter twice using the jump back action even if I have resend checking on?**
- **A.** Yes, the same automatic email can be sent twice even if your resend checking default options are turned on.

Missing Tasks

- **Q. Why do I not see a task for a name record in the Sequence Column of the Rollup List?**
- **A.** Tasks can be empty in the Sequence column of a Rollup List for a number of reasons. Please review the below scenarios to attempt to locate the record.
  - **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.
  - **Has the record entered at least the first step of the Sequence?** Until a record has entered the first step of a Sequence there will be no task displayed in the Sequence column.
  - **Check your start/stop times and send on days.** If a Sequence is not scheduled to run at the time the record should have entered the Sequence, 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 start a Sequence Thursday at 8am. The task would not appear in the Sequence column 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. 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 **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 Sequence Task Screen** 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 **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. (The Sequence Task Column will remain blank if they are readded)

- **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.
- **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 as needed.
  - **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.

Managing Templates

- **Q.** How can I create a template?
- **A.** Templates can be created from inside of a Rollup that does not have an active Sequence attached to it.
  - Click the Create a Simple Sequence icon.
  - Create your Simple Sequence by adding in all desired steps.
  - Click Save as template and name the Simple Sequence.
  - Click the Save button in the bottom right corner of the window.
- **Q.** How can I edit a template?
- **A.** Templates can be edited from a few different places.
  - Clicking on **Sequence Templates** from the Rollup List Grid will open up your Sequence template list.
  - Click **Actions>Edit** to edit this template. You can also click **View** to see an overview of the template and then click **Edit Template** button in the bottom right corner to make adjustments to the Template.
  - From Inside a Rollup list clicking the **Sequence From Template** icon will open up your Sequence template list and give you the same options listed above.
- **Q.** How can I delete a template?
- **A.** Templates can be deleted from the **View Template** screen.

- Open the **Sequence Templates list** from either the Rollup List Grid or by clicking Sequence From Template inside of a Rollup List without an active Sequence attached to it.
- Click **Actions>View**.
- Click the **Delete Template** button in the bottom left corner.

Sequencing Types

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