Simple Sequencing

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

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What is Simple Sequencing?

Simple Sequencing gives your users a step-by-step workflow for the Name records in a Rollup list. You build a list of manual and automatic steps, attach the sequence to a Rollup, and PCRecruiter tells each user what to do next for every record. The **Sequence** column in the Rollup shows the current step for each record, so users can see the day's tasks at a glance.

Simple Sequences are linear: every record moves through the same steps in the same order. If you need triggers, conditions, or branching, use Advanced Sequencing instead. See Simple vs. Advanced Sequencing to choose between them.

Important terms

- **Rollup list:** A list that groups related Names, Companies, and Positions for searching, sorting, reporting, and sequencing. See Creating and Configuring Rollup Lists.
- **Simple Sequence:** A linear sequence that is quick to set up. It runs on the Names tab of a Rollup list.
- **Advanced Sequence:** A sequence with triggers and conditions that can react to candidate interactions and run several branches. See Advanced Sequencing Overview.
- **Step:** One action in the sequence, such as an email, a call, or a LinkedIn action. A step is either manual (a user does it) or automatic (PCRecruiter does it).
- **Task:** The work a user does for one record at a manual step. Users work tasks from the Sequence column of a Rollup or from the Sequence Tasks dashboard.
- **Sequence template:** A saved sequence that you can activate on any Rollup without building the steps again. The template list holds both Simple and Advanced templates.

- **Sequencing Analytics:** Reports on completed steps, record status, and email results such as opens and replies. See Sequencing Analytics.

Permissions

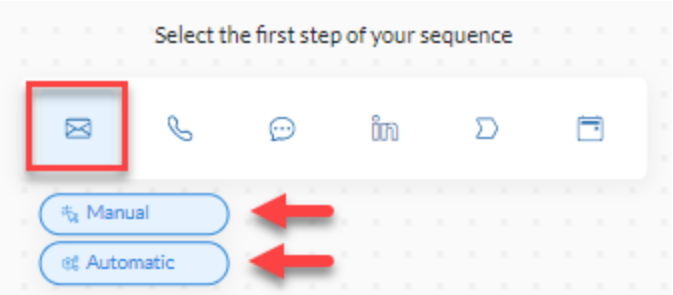
Sequencing permissions control what users can see and do with Simple Sequences. Users also need Rollup permissions to use Simple Sequencing. For details, see User Security.

	No Permission	Read Only	Add/Update	Full Permission
Access Sequencing (see the Sequence column)	✗	✓	✓	✓
Work assigned tasks	✗	✓	✓	✓
View sequences and templates	✗	✓	✓	✓
Activate a sequence	✗	✗	✓	✓
Pause, resume, or stop a sequence	✗	✗	✓	✓
Create and edit sequence templates	✗	✗	✓	✓
Delete sequence templates	✗	✗	✗	✓

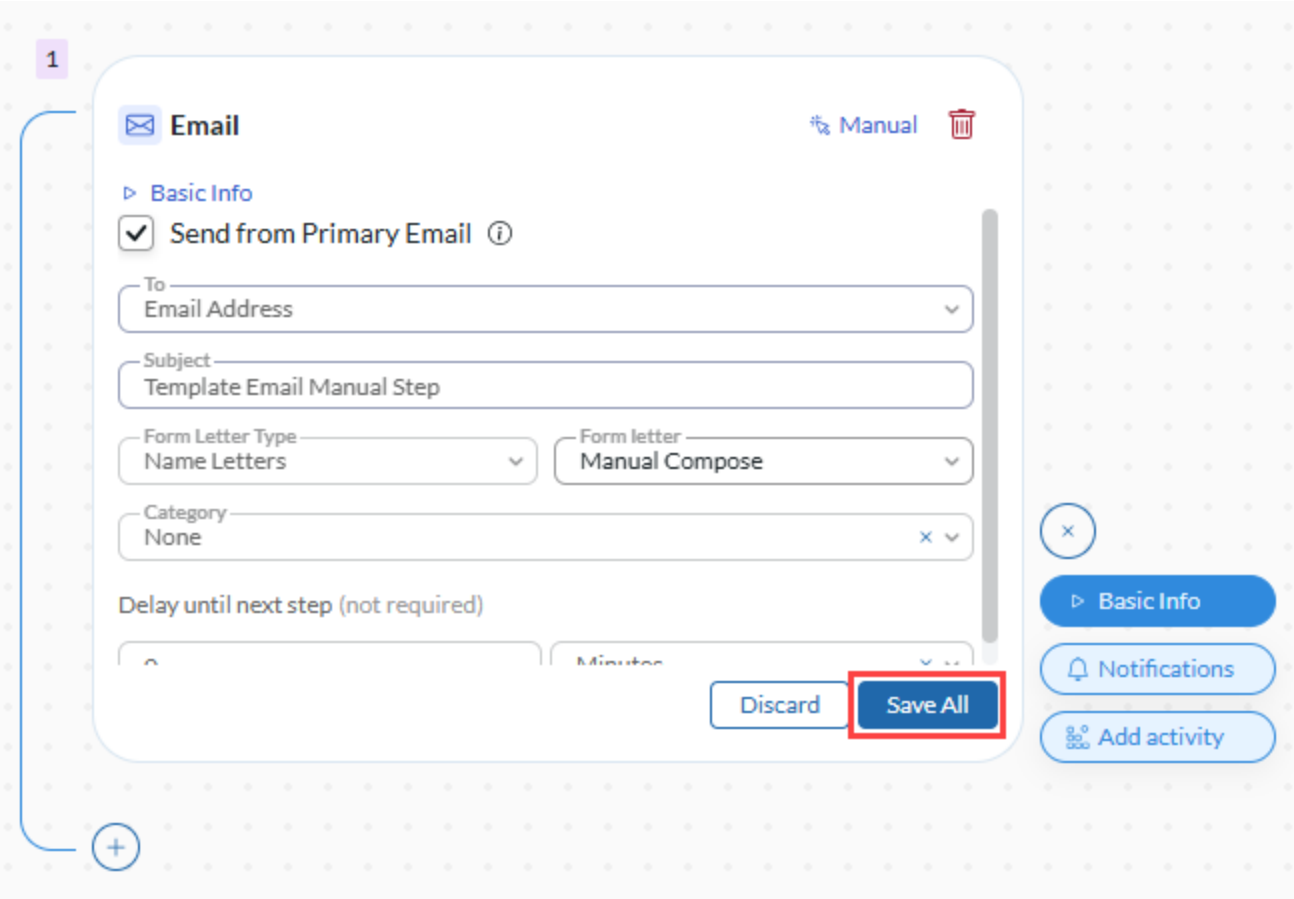
Users see only their own tasks in the Sequence column unless their Sequence Tasks permission lets them see all tasks.

Creating a Simple Sequence

1. Open a Rollup list and go to its **Names** tab.
2. Click the **Create a Simple Sequence** button in the upper right corner. (If the Rollup already has a sequence, this button is disabled. Only one sequence can run on a Rollup at a time.)
3. Type a name for the sequence, then select the first step. Click a step type, then choose **Manual** or **Automatic**. The step types are described below.



1. Fill in the step. Required fields are marked with a red asterisk. Every step needs a **Step Name** (50 characters or fewer).
2. Optionally, use the buttons on the left of the step:
   - **Basic Info:** the step settings, including **Delay until next step** (minutes, hours, or days to wait before the record moves on).
   - **Notifications:** users to notify when the step is completed or when it errors.
   - **Add activity:** an extra activity to write when the step is completed, in addition to the default activity.
3. Click **Save All**. This checks the step for errors. You must save every step before you can activate the sequence. Click **Discard** to undo your changes to the step.



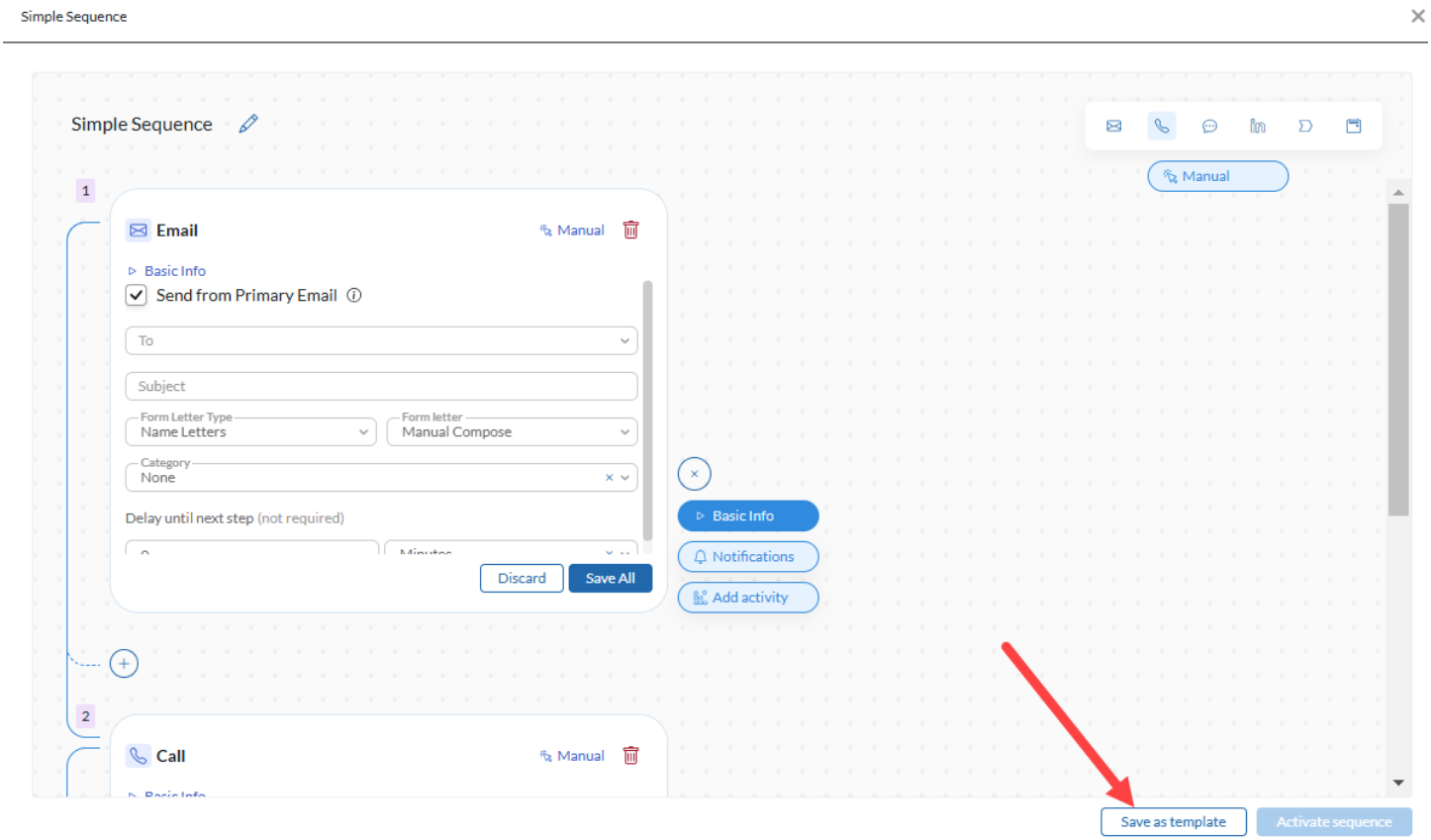
1. To add more steps, click the **Add Step** (+) button under a step, or click a step type in the toolbar at the top of the window to add it to the end.
2. To change the order, drag a step, or use the **Move up** and **Move down** buttons on the step. Use **Edit** and **Delete** on the step to change or remove it.
3. When the steps are complete, click **Activate sequence** to start it (see Activating a Simple Sequence), or click **Save as template** to save it for later.

Automatic message rule: An automatic step cannot come right after an automatic Email or SMS step. Put a manual step between them. If the sequence breaks this rule, the error message names the two steps. Automatic Add to Rollup and Link to Pipeline steps can follow each other. If you need back-to-back automatic messages, use Advanced Sequencing.

Simple Sequence Templates

A template lets you reuse a sequence on other Rollups. To make one, build the sequence as described above and click **Save as template** before you activate it. Enter a **Template name** and

click **Save**. Template names must be unique.

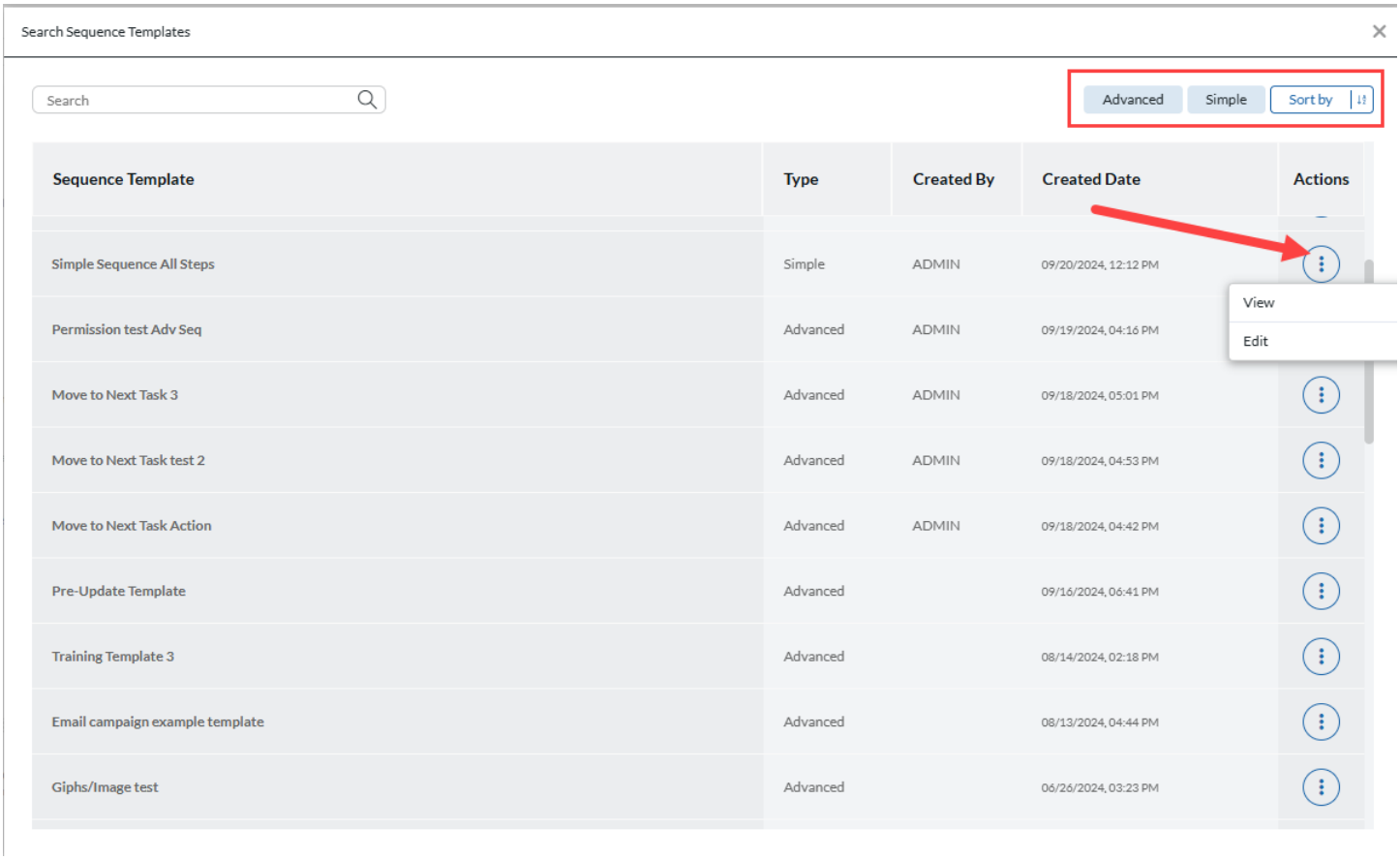


You can open the template list in two ways:

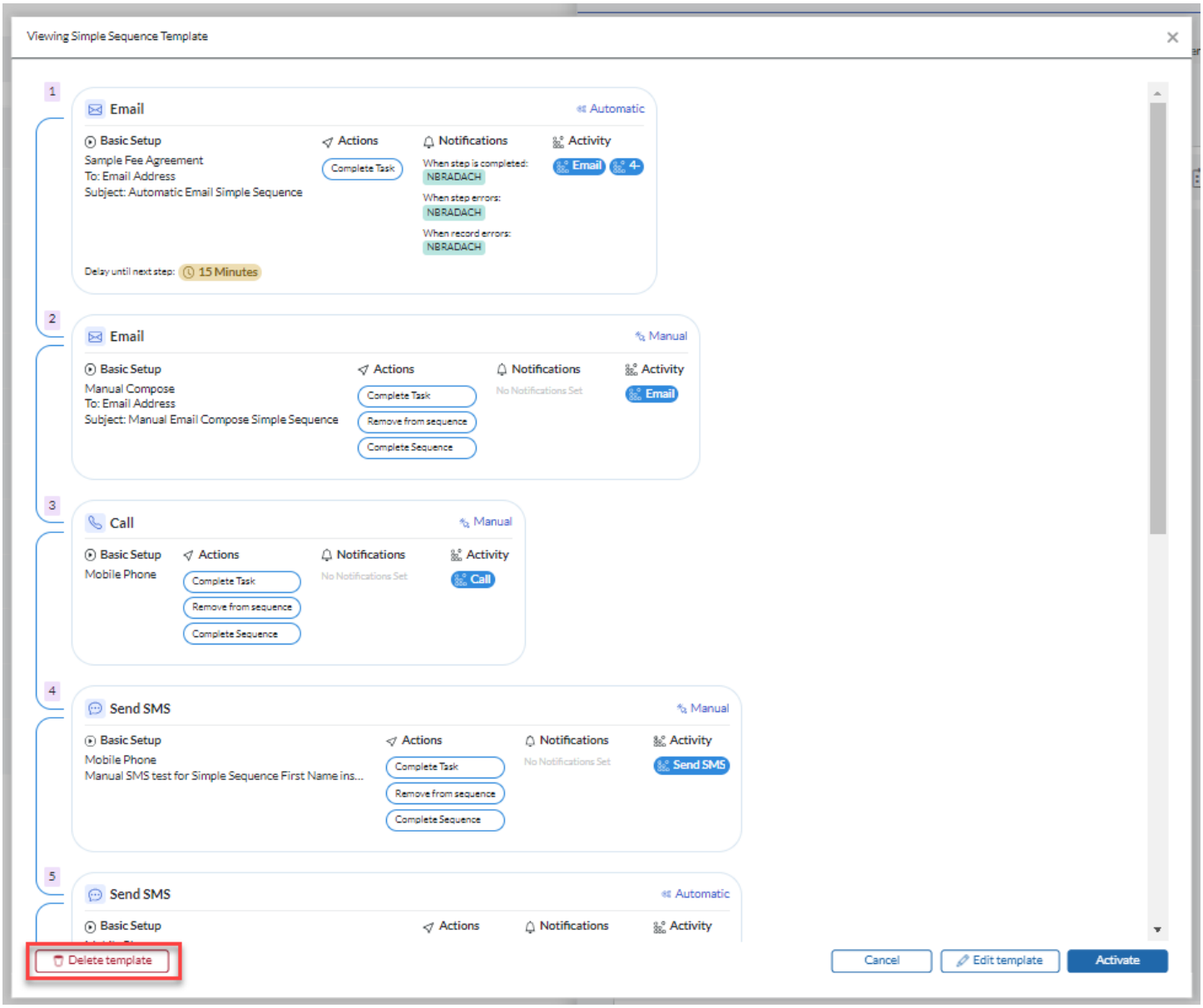
- On the main Rollups page, click the **Sequence Templates** button in the upper right corner. From here you can view and edit templates.
- On the Names tab of a Rollup, click the **Sequence from Template** button. From here you can also activate a template on that Rollup.

In the **Search Sequence Templates** window you can search by name, filter by **Simple** or **Advanced**, and sort by created date, creator, or name. Click the actions icon on a Simple template to **View**, **Edit**, or **Activate** it. For an Advanced template, the actions icon opens the Advanced Sequence Setup.

Editing a template does not change sequences that are already running from an earlier version of it.

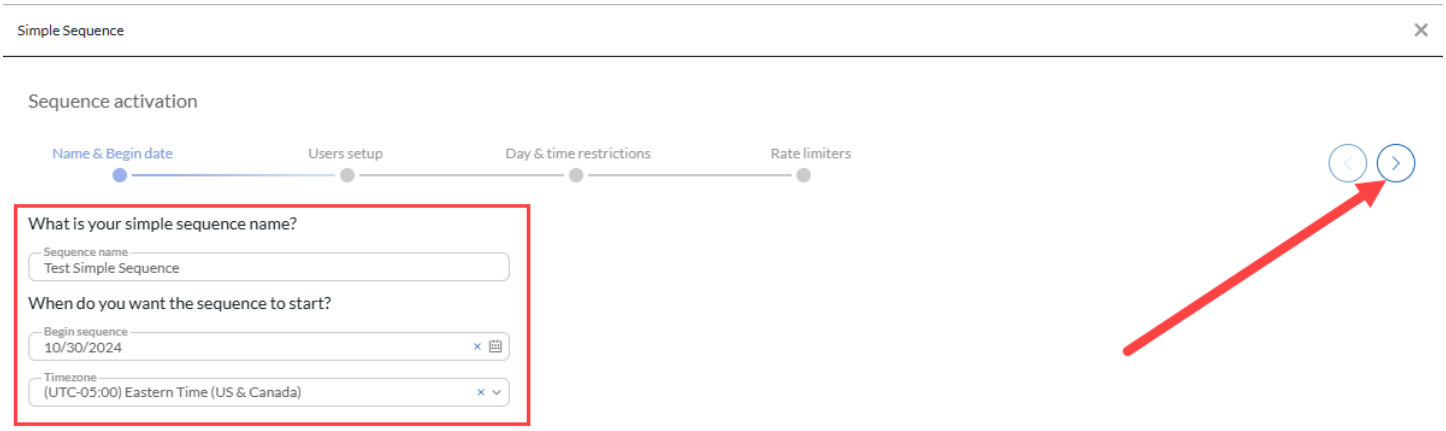


To delete a template, click its actions icon, select **View**, and then click **Delete template** in the lower left corner.



Activating a Simple Sequence

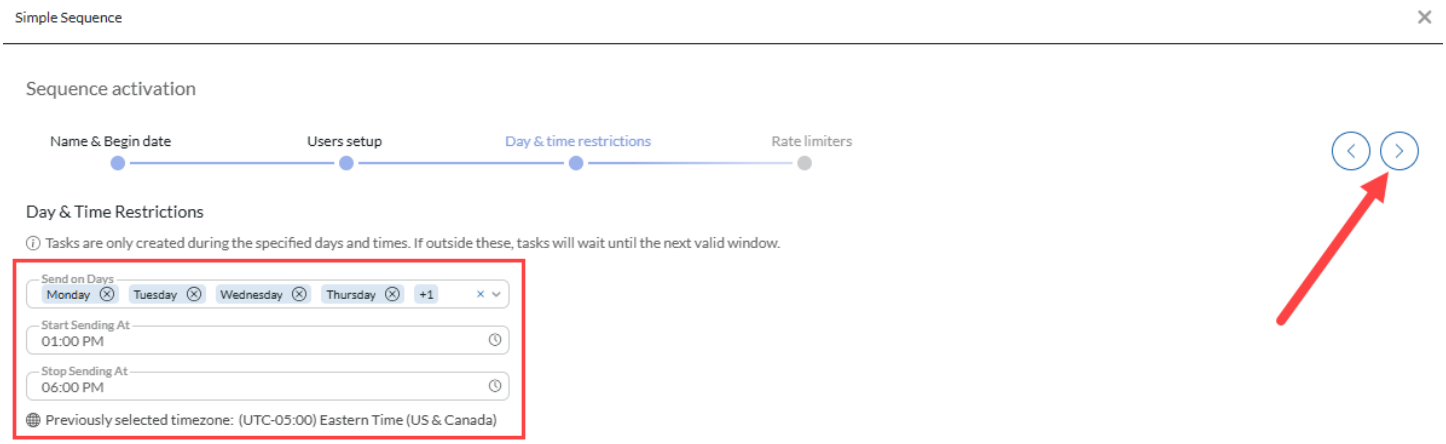
1. Start activation in one of two ways:
   - Build a new sequence with **Create a Simple Sequence** and click **Activate sequence**. The button stays gray until every step is saved and valid.
   - Click **Sequence from Template**, find the template, and select **Activate**.
2. The **Sequence activation** window opens. Use **Next** and **Previous** to move between its pages.
3. **Name & Begin date:** Enter the **Sequence name**, the **Begin sequence** date, and the **Timezone**. All three are required.



- **Users setup:** Select the **Primary user** (required). If the sequence has an automatic Email step, also select the **Primary user alias**. Optionally add **Additional users**, who can also see and work the tasks. Steps set to "Send from Primary Email" or "Send from primary user phone" use the primary user's alias and phone.



- **Day & time restrictions** (optional): Select the **Send on Days** and, if you want, a **Start Sending At** and **Stop Sending At** time. These apply to every step. Tasks are only created inside this window; a task that comes due outside it waits for the next valid day and time. For example, if you select Monday and Wednesday, tasks appear only on those days, even when a delay ends on a Tuesday.



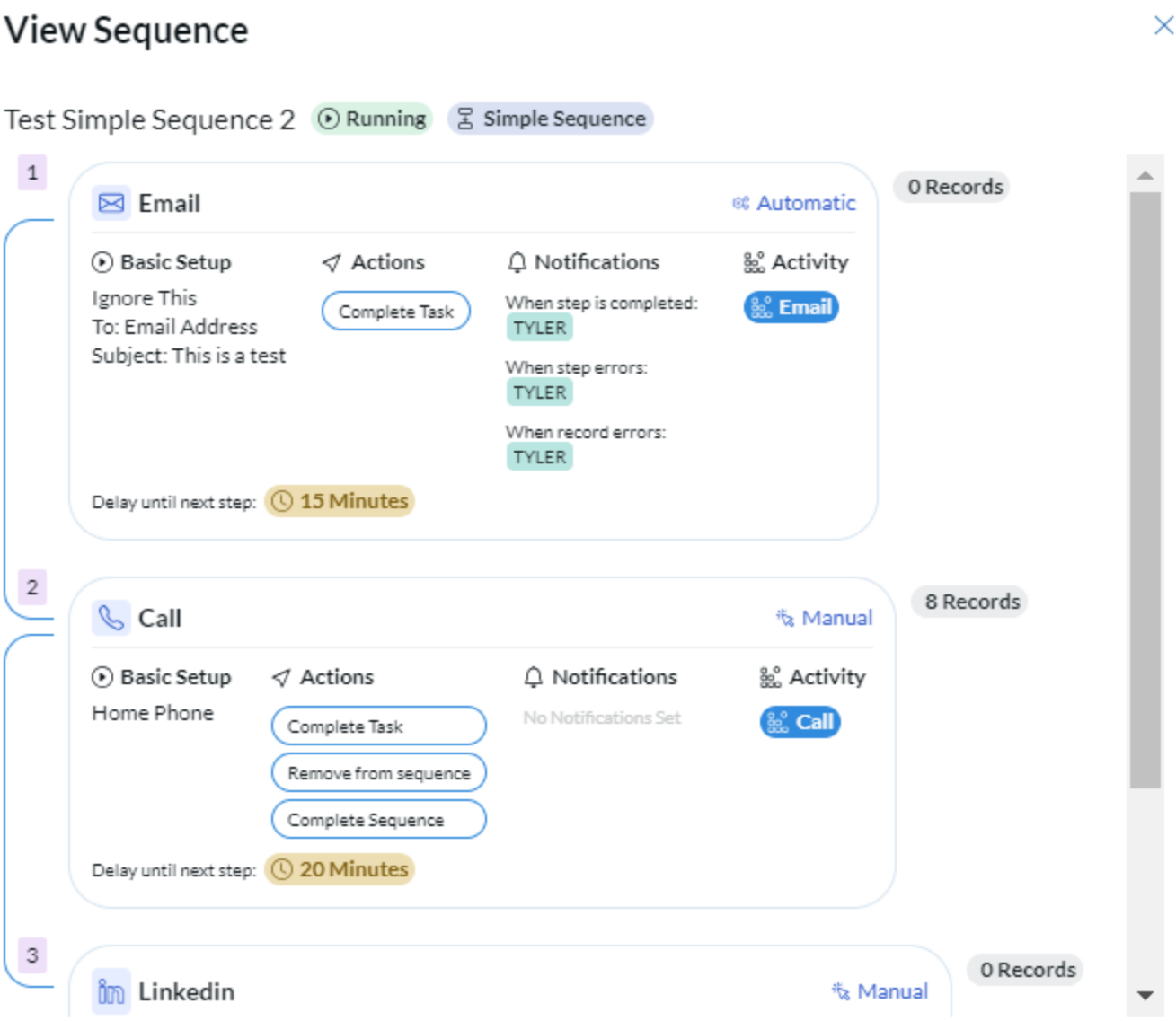
- **Rate limiters** (optional): This page appears only if the sequence has an automatic Email or SMS step. Set the **Bulk Email Limit** or **Bulk SMS Limit** and the period it applies to. See Rate Limiting.



- Click **Activate**.

The Names tab of the Rollup now shows the sequence name with **Running** and **Simple Sequence** tags, a **Sequence options** button, and a **Sequence** column. On the main Rollups page, the Rollup shows the name of its sequence and whether it is Simple or Advanced.

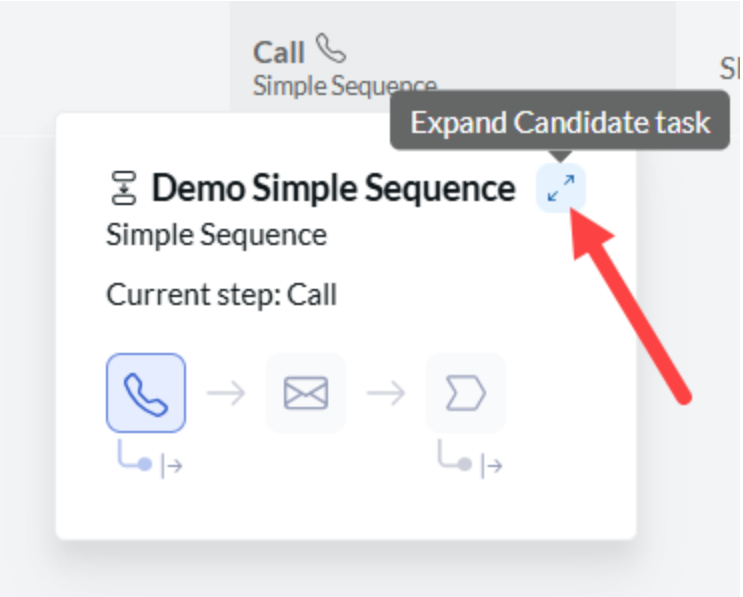
Click the sequence name to open the **View Sequence** window. It lists every step with its details and the number of records currently in that step.



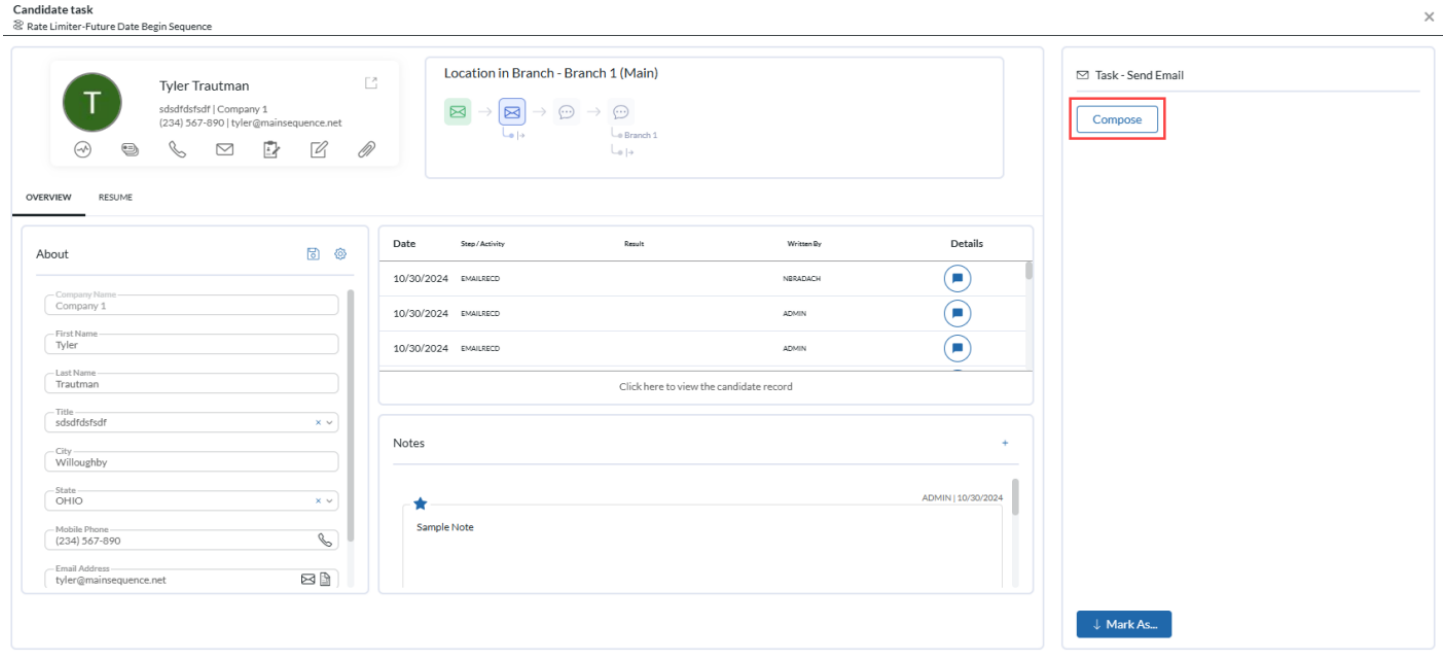
Working a Simple Sequence

Working tasks

1. Open a Rollup that has an active Simple Sequence and go to the Names tab.
2. The **Sequence** column shows each record's current step. **Pending** means the record is waiting (for example, for a delay or the next allowed send time). **Sequence Complete** means the record has finished.
3. Click the step in the Sequence column. A popup shows the current step and a map of the sequence.

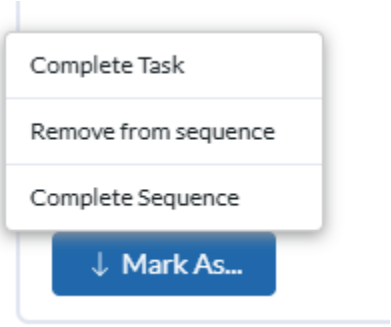


1. Click **Expand Candidate task** to open the **Candidate task** window. (You cannot open the task while the sequence is paused, while the step is pending, or when the record has an error.)
2. Do the task using the buttons on the right side of the window. For example, **Compose** for an email, **Dial** for a call, or **Send SMS Message** for a text.



1. When you are done, click **Mark As...** and select one:
   - **Complete Task:** the record moves to the next step (after any delay). This option does not appear on the last step.

- **Complete Sequence:** the record finishes the sequence now.
- **Remove from sequence:** the record leaves the sequence and is removed from the Rollup list.

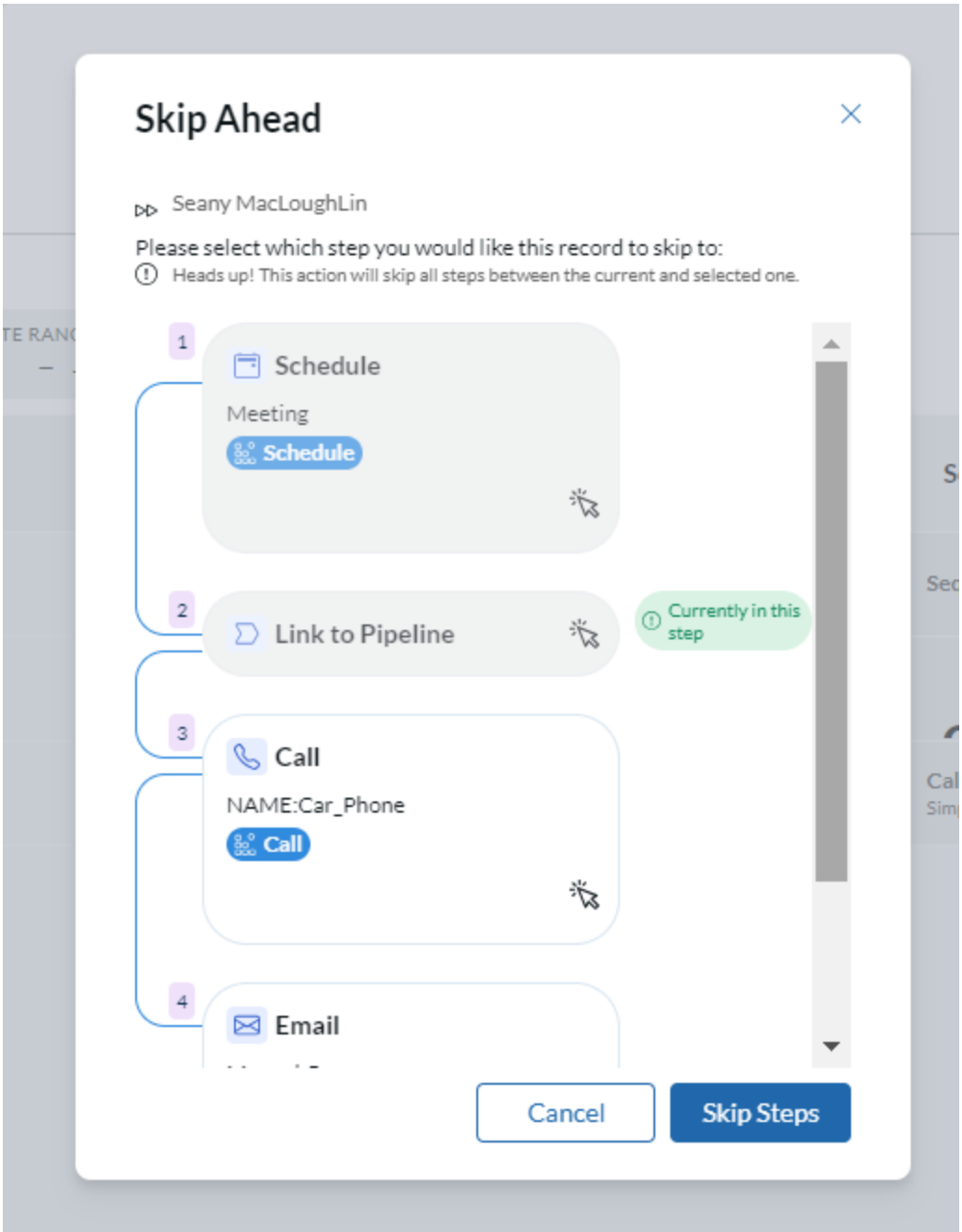


You can also act on a record from the Rollup grid. Click the record's actions icon and open **Sequence actions**. Depending on the step, you can select **Complete Task**, **Move to next step now** (only while the record is waiting on a delay), **Skip Ahead**, **Jump Back**, or **Remove from Sequence**. These actions are not available while the sequence is paused.

Skipping ahead

Skip ahead moves a record to a later step without doing the steps in between (for example, from step 1 to step 4).

1. In the Candidate task window, click **Skip ahead** in the upper right corner. Or, from the Rollup grid, click the record's actions icon and select **Sequence actions** > **Skip Ahead**.
2. Select the step to move the record to. Earlier steps are grayed out.
3. Click **Skip Steps**. The record moves to that step and skips every step in between.



Skip ahead is not available on the last step. You can also skip ahead while a record is pending.

Jumping back

Jump back moves a record to an earlier step so it can redo it (for example, from step 4 back to step 2).

1. In the Candidate task window, click **Jump Back** in the upper right corner. Or, from the Rollup grid, click the record's actions icon and select **Sequence actions** > **Jump Back**.

2. Select the step to move the record to. Later steps are grayed out; use Skip ahead to move forward.
3. Click **Jump Back**. The record goes through the sequence again from that step, as if it had not completed the later steps.

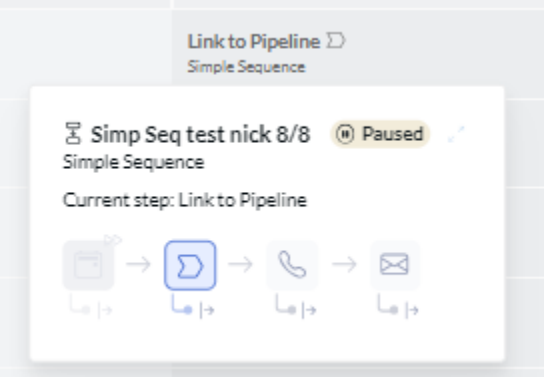
Jump back is not available on step 1. You can also jump back while a record is pending.

Kanban view

A Rollup with a Simple Sequence can also show its records as a board, with one column per step. Each column shows counts of **Active**, **Pending**, and **Error** records. Drag a card to another column to move that record to that step. You cannot drag cards while the sequence is paused.

Pausing, editing, and stopping a Simple Sequence

Click the **Sequence options** button in the upper right corner of the Rollup's Names tab to see the **Pause**, **Resume**, **Edit**, and **Stop** buttons. You must pause the sequence before you can edit or stop it.



Pausing

Click **Pause**. The sequence name now shows a **Paused** tag. While paused, users can view tasks but cannot work them, and delays and automatic steps do not run. Click **Resume** to start the sequence again.

Editing an active sequence

1. Pause the sequence, then click **Edit**.

2. The edit window shows the current steps. You can add new steps anywhere after step 1 and change the settings of existing steps.
3. To turn off a step, click **Deactivate** on it. The step shows a **Deactivated** tag. Records already in that step stay there until their task is completed; new records skip it. Click **Activate** to turn it back on. Step 1 cannot be deactivated.
4. Click **Save sequence**, then click **Resume** on the Rollup.

On an active sequence you cannot delete or reorder steps that are already saved, rename saved steps, or change the sequence name or begin date.

Stopping

Pause the sequence, then click **Stop** and confirm. Records complete the sequence in their current step, and the sequence is removed from the Rollup. You can then activate a new sequence on that Rollup.

Simple Sequence step types

Every step needs a **Step Name**. LinkedIn and Schedule steps are named automatically and cannot be renamed.

Email (Manual or Automatic)

A manual Email step prompts the user to send an email. The user can start from a form letter or choose **Manual Compose** to write the email. An automatic Email step sends a form letter for the user.

- **Required: To** (an email field on the Name record), **Form Letter Type** (Name Letters or Position Letters), and **Form letter**.
- **Sender: Send from Primary Email** is selected by default; the primary user and alias are set when you activate. To send from someone else, clear it and choose **From (username)** and **Email Alias**.
- **Optional: Subject** and **Category**. Automatic steps can also include **Attachments** (a global attachment or an uploaded file).

Call (Manual)

Prompts the user to call the record.

- **Required: Phone** (the phone field to call).

SMS (Manual or Automatic)

A manual SMS step prompts the user to send a text. An automatic SMS step sends the text for the user. You can use insert fields to fill in information from the database.

- **Required: To phone field** and **SMS Text** (1,000 characters or fewer).
- **Sender: Send from primary user phone** is selected by default. To send from someone else, clear it and choose a **From User**.

LinkedIn (Manual)

Prompts the user to open the record's LinkedIn profile (or search for the person) and take an action.

- **Required:** the action: **View profile**, **Interact with post**, **Connection request**, or **Send inMail**.

Link to Pipeline (Manual or Automatic)

A manual step prompts the user to find a position and add the record to its Pipeline. The user picks the position while working the task, and can link the record to more than one Pipeline. There are no required fields when you set up the step.

An automatic step adds the record to one Pipeline that you choose when you set up the step.

- **Required (automatic only): Position**.

Schedule (Manual)

Prompts the user to schedule a **Meeting** (a calendar event) or an **Interview** (a Pipeline step plus a calendar interview). An interview moves the record to the selected step in the chosen Pipeline. This step cannot add a record to the Inbox or create a placement.

- **Required: Schedule** type (Meeting or Interview).

Add to Rollup (Automatic)

Adds the record to another Rollup list.

- **Required: Rollup**.

Other Action (Manual)

A general task for anything the other step types do not cover. You can give the user **Instructions** and a **Script** (each 2,000 characters or fewer). Both are optional.

Rate Limiting

Email rate limiting

- We cannot tell you a "safe" number of emails to send in a given time. Each email provider uses its own rules, so contact your provider about sending limits. These articles are a good start:
  - Microsoft 365 Online Limits
  - Gmail Sending Limits
- Start low. Do not use your provider's full limit right away; you can raise the rate limiter later.
- If you need to send large amounts of email, consider a bulk email provider.
- The email rate limiter counts per email alias, across every sequence and Email Campaign that sends from that alias. For example, two sequences use the same user and alias, each with a limit of 200 emails per day. The first runs from 8 am to 9 am and sends 200 emails. When the second starts at 3 pm, it sends nothing, because the alias has already reached 200 for the day.
- Rate limiters count only bulk emails from Email Campaigns and sequences. Individual emails do not count toward the limit, but your email provider may still count them toward its daily limit.
- Always give recipients a way to opt out of further messages.

SMS rate limiting

- SMS steps in sequences send through the RingCentral integration. See RingCentral's guidelines for bulk SMS.

- The SMS rate limiter counts per phone number, across every sequence in the database. Individual and manual SMS messages do not count.
- Always give recipients a way to opt out of further messages.

For troubleshooting, see Simple Sequencing: Common Questions.