



Sales

Sequence

Sequences

New Sequence

Sequence Name Created By Created On	1 Active	1 Paused	1 Not Sent	1 Bounced	1 Delivered	1 Reply	1 Interested
Sequence Name Created By Created On	1 Active	1 Paused	1 Not Sent	1 Bounced	1 Delivered	1 Reply	1 Interested
Sequence Name Created By Created On	1 Active	1 Paused	1 Not Sent	1 Bounced	1 Delivered	1 Reply	1 Interested



Sales

Sequence

Sequences

New Sequence

<u>Sequence Name</u>	1	1	1	1	1	1	1
Created By	Active	Paused	Not Sent	Bounced	Delivered	Repliy	Interested
Created On							
<u>Sequence Name</u>						1	1
Created By						Repliy	Interested
Created On							
<u>Sequence Name</u>						1	1
Created By						Repliy	Interested
Created On							

New Sequence X

Sequence Name

Cancel Create

Sales

Sequence

Add Contact ▾

Start ▾

Sequence Name

Created By: John Smith

Created On: 10-Nov-2023

Schedule: Every Monday 7:00 PM - 8:00 PM

Contacts: 20

1
Active

1
Paused

1
Not Sent

1
Bounced

1
Delivered

1
Reply

1
Interested

Active

Overview

Emails

Contacts

Overview									



Sales

Sequence

Add Contact

Start

Sequence Name

Created By: John Smith

Created On: 10-Nov-2023

Schedule: Every Monday 7:00 PM - 8:00 PM

Contacts: 20

1
Active

1
Paused

1
Not Sent

1
Bounced

1
Delivered

1
Repliy

1
Interested

Overview

Emails

Contacts

Empty table area with a blue header bar.



Sales

Sequence

Add Contact

Upload CSV

Select from list

Add Contact



Select Contact List

Select File

Download sample CSV

Cancel

Next

Sales

Sequence

Add Contact

Upload CSV

Select from list

Sequence Name

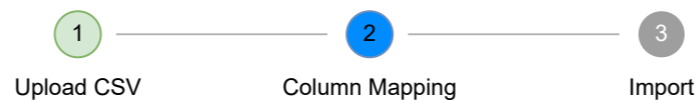
Created By: John Smith

Created On: 10 Nov 2020

Sche

Ove

Add Contact



Column Mapping

Name <input checked="" type="checkbox"/>	Email <input type="checkbox"/>	Phone <input checked="" type="checkbox"/>	Designation <input type="checkbox"/>	Company <input checked="" type="checkbox"/>
<input type="text" value="Contact Name"/>	<input type="text" value="Select Field"/>	<input type="text" value="Phone Number"/>	<input type="text" value="Select Field"/>	<input type="text" value="Select Field"/>
John Smith	a@a.com	1234567890	CEO	demo company
John Smith	a@a.com	1234567890	CEO	demo company

Settings

What stage would you like to set the contacts to?

- Lifecycle Stage 1
- Lifecycle Stage 2

If contacts already exists

- Update the existing record with information from CSV
- Skip it (Do not update existing record)

Sales

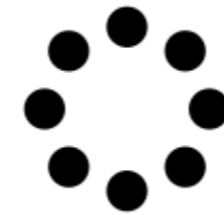
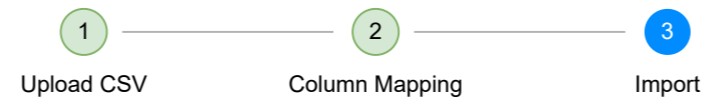
Sequence

Add Contact

Upload CSV

Select from list

Add Contact



Importing Contacts

Cancel Import

Sales

Sequence

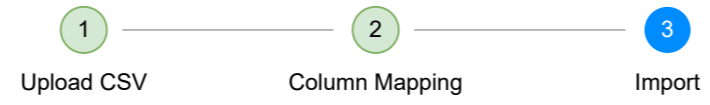
Sequence Name

Created By: [Name]

Created On: [Date]

Add Contact ▾
Upload CSV
Select from list

Add Contact



Importing Completed

Ok

Sales

Sequence

Add Contact ▾

Start ▾

Sequence Name

Created By: John Smith

Created On: 10-Nov-2023

Schedule: Every Monday 7:00 PM - 8:00 PM

Contacts: 20

1
Active

1
Paused

1
Not Sent

1
Bounced

1
Delivered

1
Reply

Start Now

Schedule

Stop

Overview

Emails

Contacts

Contact Name

Company Name

Email

Contact Name

Company Name

Email

Contact Name

Company Name

Email

Sales

Sequence

Add Contact ▾

Start ▾

Sequence Name

Created By: John Smith

Created On: 10-Nov-2023

Schedule: Every Monday 7:00 PM - 8:00 PM

Contacts: 20

1	1	1	1	1	1	1
Active	Paused	Not Sent	Bounced	Delivered	Reply	Interested

Overview

Emails

Contacts

Add Step

1	Day 1						
<input checked="" type="checkbox"/>	Subject of email	1	1	1	1	1	1
	Body of the email (2lines)	Sent	Scheduled	Delivered	Bounced	Reply	Interested
2	Day 2						
<input checked="" type="checkbox"/>	Subject of email	1	1	1	1	1	1
	Body of the email (2lines)	Sent	Scheduled	Delivered	Bounced	Reply	Interested

Sequence Name

Create
Sched

Over

1
✓

2
✓

1 Interested

1 Interested

1 Interested

Add Step

Add a sequence step

When to start this step?

Immediately after the contact is added to sequence

after the contact is added

minutes
hours
days

Cancel Next

Sales

Sequence

Add Contact ▾

Start ▾

Sequence Name

Create

Sched

Over

1



2



Add a sequence step



When to start this step?

Set the amount of time you would like to wait between steps

after the previous step

Add conditions

Send this email to

1
Interested

Add Step

1
Interested

1
Interested

Cancel

Next

Sales
Sequence

Add Contact

Start

Sequence Name

Create
Sched

Over

Add a sequence step



When to start this step?

Set the amount of time you would like to wait between steps

after the previous step

Add conditions

Send this email to

- Who hasn't opened the email in previous step
- Who has opened the email in previous step but not responded

Select condition

- Who hasn't opened the email in previous step
- Who has opened the email in previous step but not responded
- Who has replied to the email in previous step

Cancel

Next

1
Interested

Add Step

1
Interested

1
Interested



Sales



Add an email template

Reply to previous thread

Choose from existing templates

Select template ▾

Subject

Enter email subject here

Email Body (this will be a text editor)

Select form fields ▾

Hi {{contact name}},
This is a test email.

Include Signature

Save as new template

Enter template name

Generate Preview for contact (optional)

Select contact ▾

To:	Example Contact <example@gmail.com>
Sub:	subject of the email

Hi Example,
This is a test email

Cancel

Done

Sales

Sequence

Add Contact

Start
Start Now
Schedule
Stop

Sequence Name

Created By: John Smith

Created On: 10-Nov-2023

Schedule: Every Monday 7:00 PM - 8:00 PM

Contacts: 20

1 Active 1 Paused 1 Not Sent 1 Bounced 1 Delivered 1 Reply

Overview | Emails | **Contacts**

Contact Name Company Name

Contact Name Company Name

Contact Name Company Name

Start sequence



Do you want to start the sequence now?

No

Yes

Sales

Sequence

Add Contact ▾

Start ▾
Start Now
Schedule
Stop

Sequence Name

Created By: John Smith

Created On: 10-Nov-2023

Schedule: Every Monday 7:00 PM - 8:00 PM

Contacts: 20

1 Active 1 Paused 1 Not Sent 1 Bounced 1 Delivered 1 Reply

Overview Emails **Contacts**

Contact Name Company Name

Contact Name Company Name

Contact Name Company Name

Schedule sequence



Start this sequence from

Select date

Cancel

Schedule