

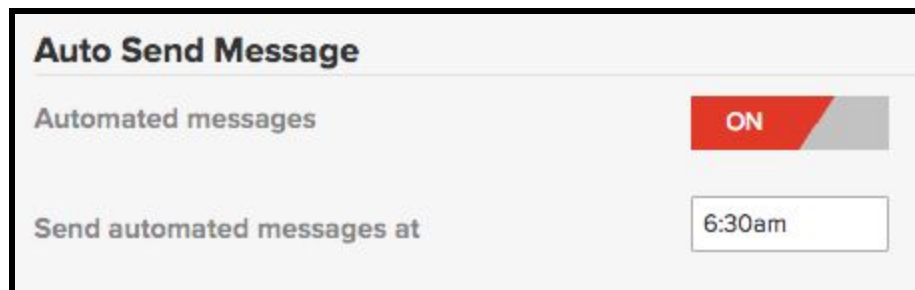
Auto Send Message: Email / SMS

Basics: All Users

Once you have made it through the creating Workflows, Checklists, Actions, Branching, and Starting the Workflow, your calendar will begin filling up quickly with important activities. As that happens, you can easily get overwhelmed with menial tasks like sending email and SMS messages. The best practice is to assign those tasks to be send automatically in order to spend less time "working your database". You will learn more about automating actions in **Basics 20: Activity Actions without Checklists** but it is important to understand that assigning activities to send automatically isn't enough, you have to make sure Realvolve has the automation turned **ON**, otherwise they won't go out.

To turn on automated messages go to **SETTINGS > EMAILS**

Make sure that the "**Automated messages**" option is in the **ON** position and that you have assigned a time of day to process messages that are not assigned specific send times. This is your "**Master Switch**" which allows automated emails and sms messages to be sent on your behalf.



Tasks having actions which send automatically without an assigned time will wait until the specified time before sending each day. The example above will automatically send messages at 6:30am each day.

Any activity in your calendar with an assigned date and time will process that message at the specified time within a 10 minute window.

Automation Rules:

There are some **RULES** that must be followed for automated messages:

1. The Activity MUST NOT have Checklists - If an activity uses a checklist, the checklist must be completed before the message can be sent (excluding incomplete checklists actions)
2. The Activity MUST HAVE ONLY 1 Action - If an activity has more than one action then the user must select which action to run.
3. The Activity MUST HAVE the send a message option set to "Send Automatically" or "Send Immediately" in the Action.

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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