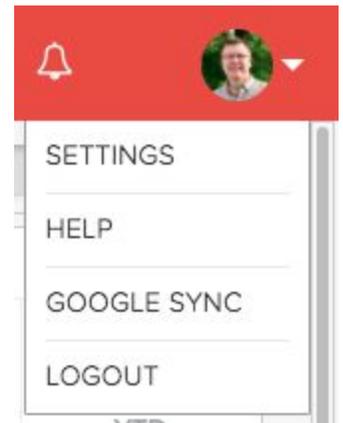# User Settings

User Setup: All Users

As a user of the realvolve account there are several important settings that need to be assigned. Some of the settings are dependant on the security settings set by your administrator/account owner, if an option listed below is not available then consult with your administrator/account owner to discuss your options.   To access the Settings of Realvolve, login to your realvolve account: http://login.realvolve.com and enter your login information. Click on the down arrow located in the upper right corner of the red header of the realvolve screen. (*Right of the User Avatar*). Click on **SETTINGS** from the drop-down menu to show the settings options on the left side of your screen.

1. Select the "**My Account**" option to enter your personal information. <u>Be sure to fill in all the fields in this screen since they are used as merge fields in messaging templates which we will cover later.</u>

   Note: Along with entering your personal information, the "My Accounts" section can be used to change your password.

2. Select "**Email**" to connect your IMAP/SMTP email account. There are several Email settings which can be ON/OFF including the following:

   a. **Auto Signature** - Automatically Add the default signature on outgoing emails.

   b. **Email Notifications for Start Workflow** - Receive an email notification when workflows are started on Contacts, Properties or Transactions from the server.

   c. **Email Notification for Incoming Email** - Receive an email notification in your personal account when receiving emails in your Realvolve account.

   d. **Auto Send Message** - This is the **MASTER SWITCH** which allows outbound emails and SMS text messages to be sent automatically/immediately from

workflow actions. Your messages **WILL NOT BE SENT** automatically if this setting is **OFF**
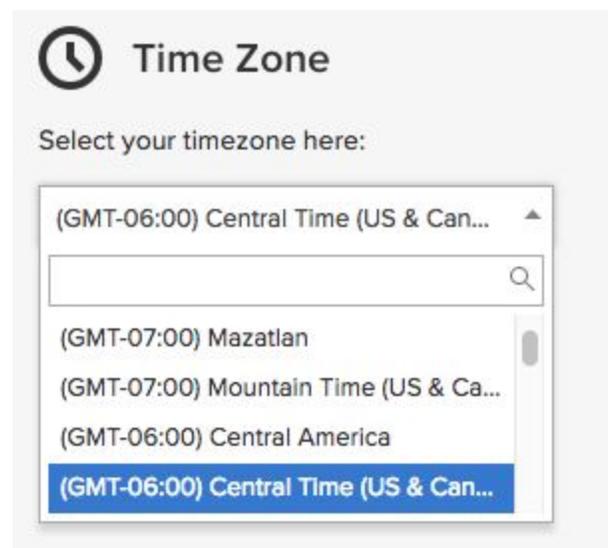
e. **Daily Email Reminders** - Receive daily email notification with Appointments, Todo's as well as reminders on import dates on Properties & Transactions.

f. **Sending Messages** - Automatically BCC personal email account when sending emails through your Realvolve email account. This allows a copy of Realvolve emails to be stored in your personal email account.

3. Select "**SMS Services**" to choose a custom SMS number for sending text messages from inside Realvolve. Choose your country, enter your local area code then choose one of the available SMS numbers then click **Save**.

Note: In order for Realvolve to send SMS messages you <u>MUST</u> select from the list of available SMS numbers. ***THIS WILL NOT BE THE SAME AS YOUR NORMAL MOBILE PHONE SMS NUMBER.***

Once you have an assigned Realvolve SMS number you can select notification preferences to receive Emails and/or SMS notifications when you receive a Realvolve SMS Message. Realvolve uses the "Cell Phone" field in your My Account settings for notifications.

4. Select "**Time Zone**" to select your correct Time Zone.

Note: *If you are in the Central Time Zone in the US or Canada be sure to "Central Time (US & Canada" and NOT "Central America"*

5. Select **"Set Default Fields"** to setup the default starting time for the calendar view.

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

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