

Starting A Workflow

Basics: All Users

You can start a workflow from the dashboard or the radar tab of a Contact, Property or Transaction using the **START A WORKFLOW** button.



Typical Examples:

- After entering a new lead into the database you could go to the radar tab of the contact and start a “**New Lead**” workflow.
- After adding a new Property, click on the radar tab and start a “**New Listing**” workflow.
- Once a transaction is created, click on the radar tab and start the “**Buyer: Contract to Close**” workflow.

Short Videos:

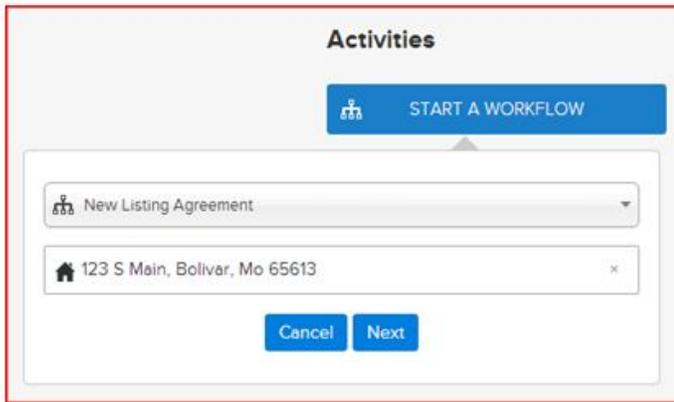
- Start a Workflow 1 ([SEE VIDEO](#))
- Start a Workflow 2: Selecting which activities get started “Groups” ([SEE VIDEO](#))
- Start a Workflow 3: Milestone Dates ([SEE VIDEO](#))
- Start a Workflow 4: Selecting Party Members ([SEE VIDEO](#))
- Start a Workflow 5: Role Selection ([SEE VIDEO](#))
- How to STOP a Workflow ([SEE VIDEO](#))

What is the workflow wizard?

When you click on the “**START A WORKFLOW**” button, the workflow wizard guides you through a series of popup screens to gather the information needed for the workflow. ([SEE VIDEO](#))

Workflow Wizard Steps:

1. Click on **Start a Workflow**
2. Select a Workflow to Start (example: **New Listing Agreement**)
3. Select a Contact, Property or Transaction (example: **123 S Main, Bolivar, Mo 65613**)



Activities

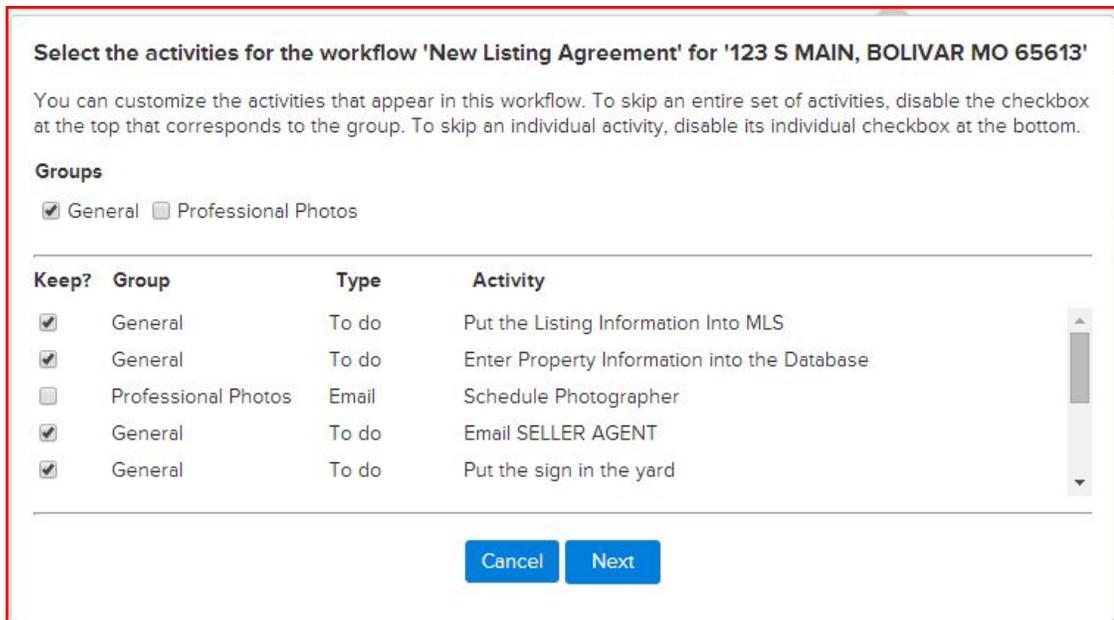
START A WORKFLOW

New Listing Agreement

123 S Main, Bolivar, Mo 65613

Cancel Next

4. Deselect any unwanted workflow activities individually or by group (if any) - the example below has one activity that is in the "Professional Photos" group. If you know you don't want professional photos taken then uncheck the group and any activities in that group will be unchecked. You can assign up to 20 groups per workflow. Once you have all your groups selected then press **[Next]**



Select the activities for the workflow 'New Listing Agreement' for '123 S MAIN, BOLIVAR MO 65613'

You can customize the activities that appear in this workflow. To skip an entire set of activities, disable the checkbox at the top that corresponds to the group. To skip an individual activity, disable its individual checkbox at the bottom.

Groups

General Professional Photos

Keep?	Group	Type	Activity
<input checked="" type="checkbox"/>	General	To do	Put the Listing Information Into MLS
<input checked="" type="checkbox"/>	General	To do	Enter Property Information into the Database
<input type="checkbox"/>	Professional Photos	Email	Schedule Photographer
<input checked="" type="checkbox"/>	General	To do	Email SELLER AGENT
<input checked="" type="checkbox"/>	General	To do	Put the sign in the yard

Cancel Next

- If Activities in the workflow use any of the “assign to” role placeholders like Listing Agent, Buyers Agent, Assistant, Record Owner, etc., the wizard will ask which user should assume that role (sample below)

Notes & Correspondence **Activities**

Add a new note about Abraham Lincoln **START A WORKFLOW**

Assign tasks for '1-New Contacts' for 'ABRAHAM LINCOLN'

Each activity must be assigned to someone on your staff. Please select the correct user for the role listed below.

Role	Choose a name
Record Owner	Mark Stepp
Assistant	Kathy Stepp

Cancel **Next**

- Enter milestone dates to calculate individual activity dates.

Verify New Listing Agreement dates for 123 S MAIN, BOLIVAR MO 65613

This workflow depends on following dates. Please verify dates and change as necessary.

MileStone	Date
Listing date	Apr 01, 2015
Expiring date	Jun 30, 2015

These activities will be added to your calendar. Some dates are derived from the list of dates at left. However, you can set a custom date for any activity. Just click on the date to change.

Date	Action	Title	Assigned to
Apr 01, 2015	To Do	Put the Listing l...	Mark Ste...
Apr 01, 2015	To Do	Enter Property In...	Mark Ste...
Apr 02, 2015	To Do	email SELLER AGENT	Mark Ste...
Apr 02, 2015	To Do	Put the sign in t...	Mark Ste...

Cancel **Next**

- * Changes to milestone dates will recalculate activity dates (Click in to the date field to adjust)
- * Changes to individual activity dates are allowed as needed (Click in to the date field to adjust)
- * Changes to individual “Assigned to” as needed (Click the drop down arrow to select a User)

7. If the workflow is for a property or transaction then assign all party members that are known

Verify 'New Listing Agreement' parties for '123 S MAIN, BOLIVAR MO 65613'

This workflow depends on the following parties. Please verify the participants or change as necessary.

Party	Who
Seller	Don Smith x
Seller Agent	Jack Agent x

Each of the activities below affects one or more parties. To remove, change, or add parties to an activity, click on the appropriate button.

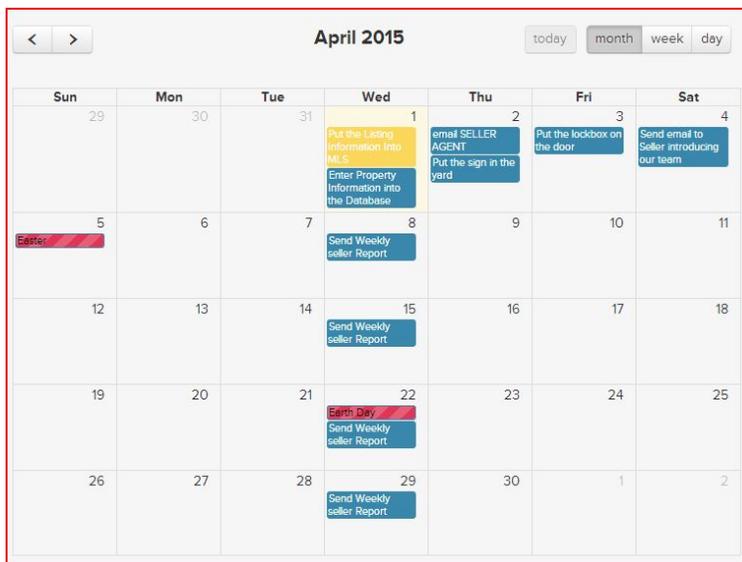
Title	Who
Put the Listing Information Into MLS	Don Smith x
Enter Property Information into the Database	Don Smith x
email SELLER AGENT	Jack Agent x
Put the sign in the yard	Don Smith x
Put the lockbox on the door	Don Smith x

< Back Cancel Done

If a party member is already assigned in the People tab of a Property or Transaction, the selected contact will show in the Who column. Otherwise, select a contact by typing in the name and choosing from the dropdown list.

Once all known party members have been selected then press **DONE** to complete the workflow wizard process which places the activities in the calendar.

8. You can now go to the calendar tab to view all activities that was added through the workflow.



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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