

# Activity Actions without Checklists

## Basics: All Users

Actions are used to perform automated processes on activities. In most cases, once an activity has been completed, the system will proceed with the assigned actions. The only exception is when actions are used along with checklists. In that case, actions can be performed when all checklist items have been completed or when there are checklist items still left to do. You can have as many Actions on an activity as necessary to allow alternate actions to be performed based on any number of conditions (This is known as branching).

For this training I will cover actions that **DO NOT** use checklists.

Click on the "**Create Actions...**" button to add an action to the activity. Each action is given a title which is used in a selection menu. If more than one action is added to an activity, the title needs to be descriptive enough to make a correct choice when the menu is displayed.

There are 3 possible automated functions of an Action:

- **Sending a message**
  - Email
  - SMS Text
  - Tweet
- **Add/Remove Tags**
  - Adding Tags
  - Removing Tags
- **Starting / Stopping another Workflows**

Any combination of the 3 options can be used in an activity. As long as you have at least one of the 3 action types selected the system will perform the action as required.

The screenshot shows the 'Create Actions...' dialog box. At the top, there is a 'Send Email' button. Below it, the 'Title\*' field contains 'Send Email'. The 'Send a message' section has two dropdown menus: the first is 'Send manually (with preview)' and the second is 'Send an email message'. Below these is a dropdown menu for 'SE001 - Opening to Seller' with a document icon. There is a checkbox for 'Update Last Email Date' which is unchecked. The 'Add and/or remove tags' section has a checked checkbox 'Add/Remove Tags from contacts' and two lists of tags: 'Current Client' and 'Lead'. The 'Start a new workflow' section has a dropdown menu set to 'Choose a workflow'. The 'Stop workflows' section has a dropdown menu set to 'Do not stop any workflows'. The 'Stop workflows for linked Property' section has a dropdown menu set to 'Do not stop any workflows'. At the bottom are 'Save' and 'Cancel' buttons.

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## **ACTION: Send a Message**

Setting up standardized message templates are one of the time saving aspects of a workflow.

Messages help answer common questions, report on the status of a project, and provide information to common issues. Having the ability to send standardized messages by email, SMS Text, or Twitter allows you to quickly engage with your customer without consuming large chunks of time writing them.

From the **Send a message** section there are 3 drop down menus:

The first menu allows you to select how you want to process the message being sent:

- **Do Not Send A Message** – means no message will be sent on this action
- **Send Manually (With Preview)** – will display a menu to allow you to see a preview of the message and make changes before it is sent.
- **Send Manually (Without Preview)** – will send the message when you specify to run the action but does not give the option to preview before it is sent.
- **Send Automatically** – this will send the message automatically based on the date/time of the activity if both are specified or if just the date is specified then it will be sent at the specified time in the **SETTINGS > EMAILS** option screen. (see: **User Setup 04: Auto Send Message**)
- **Send Immediately** – this will send the message when the activity is created and automatically mark the activity as complete. This is useful when you want an email to be sent as soon as the workflow is started.

The second menu allows you to pick the method of delivery

- **Email**
- **SMS**
- **Twitter**

The third menu allows you to choose the correct message template to send. The list of message templates depends on the "**Use With**" selection of the workflow.

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## **ACTION: Add / Remove Tags**

The Action Tags are used to automatically assign or remove tags from a database record. As your workflow progresses through its normal steps, the ability to indicate the key milestone location helps get a perspective on the current state of your system. If you are using a lead generation workflow, the “**New Lead**” tag can be assigned to a contact that just got put into the system. Once the lead becomes a customer the workflow can automatically change the tags from “**New Lead**” to “**New Customer**” so you don’t have to think about it.

To Add tags, type the tag name(s) in the ADD TAGS field or remove tags under the REMOVE TAGS field.

### **Where do tags get added/removed:**

- If the Workflow “Use With” is **Contact** then tag changes are applied to the **contact(s)** assigned in the “With” field.
  - If the Workflow “Use With” is **Property** and there are no contacts in the “With” field then tag changes are applied to the **Property** assigned in the “About” field.
  - If the Workflow “Use With” is **Transaction** and there are no contacts in the “With” field then tag changes are applied to the **Transaction** assigned in the “About” field.
  - If the Workflow “Use With” is either **Property** or **Transaction** and the “With” field does have at least one contact assigned then tag changes are applied to the Property or Transaction by default UNLESS the “**Add/Remove Tags from Contacts**” is selected. This option forces tag changes to be applied to the **contact(s)** assigned in the “With” field.
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## **ACTION: Start a new Workflow**

The ability to start a new workflow from an existing workflow is an important part of organizing yourself to be more efficient. You may want to start another workflow once the current workflow is completed. Another possibility is that your workflow process can not proceed in a single linear path and may need to branch a different direction based on the outcome of a given question or workflow step. In either case, by selecting the next workflow process, you can start that process automatically based on the needs of the current activity. Starting the workflow in this method take you through the same workflow wizard that was used when starting the original workflow however, some of the required fields will be automatically filled in using the originating workflow.

## **ACTION: Stop Workflows**

This action allows you to automatically stop specific workflows or all workflows that could be running on the Contact, Property or Transaction which this workflow is assigned to. If you have a Transaction workflow you are also allowed to stop any Property workflows that might be running. When stopping workflows the system simply deletes any NON-COMPLETED activities of the selected workflows to stop which are assigned to the Contact, Property or Transaction which the current workflow is connected to. This allows you to start one workflow and stop another or even stop the current workflow after starting a different one. This is a powerful branching feature to take a different path when necessary.

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**Note:** The video in this training shows a checkbox for *send message automatically* - this has been changed to a drop down menu showing multiple process methods for sending as described above.

[\(SEE VIDEO\)](#)

If you have any questions, please contact us at: [support@realvolve.com](mailto:support@realvolve.com)

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### Questions?

Please direct questions and comments to [support@realvolve.com](mailto:support@realvolve.com).

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