A REALVOLVE HOW-TO | By Mark Stepp

OnBoard Day 21 - Building Your Own Workflow

In yesterday's training I gave you an assignment... Did you complete it? If not, stop what you are doing and complete the assignment now! It's important to have the outlines in order for you to build your own workflows.

Today, I will explain how to enter the items on your list into Realvolve as workflow streams. (SEE VIDEO)

1. Click on **WORKFLOWS** on the top menu to display the workflow editor.
2. Click on the (+) icon in the list view.
3. Select **Create a new workflow** then click **Continue**.
4. Select one of your assignment pages from yesterday and enter the topic of the page as the workflow title.
5. Decide the "**Use With**" setting based on the type of information needed for the workflow.
6. Click on the **Add** button to add this workflow to your system.

Full detail of the workflow basic description can be found here: (SEE VIDEO)

Now you need to add each activity stream from your assignment to this workflow. Begin with the first item on your list and enter them one-by-one. You don't have to worry about the order of entry because the system will show the items in order by the scheduled date calculation. If there were any highlighted items on your list that needed templates, I suggest that you create the template for them before you start adding the activity item to the workflow.

I recommend that you watch the following video describing each field of the activity to understand how they are used. There are sections in the video which over the checklists and actions features, I will discuss those in more detail in the next two training days. (SEE VIDEO)

1. Click on [**Add Another Activity To This Workflow...**] to open the activity editor.
2. Enter the **Title** of the Activity.
3. Pick the team member in your realvolve account that will perform this activity in the **Assign To** field.
4. If the activity needs a contact from your database assigned then enter that into the **With** field. An example of would be If you are sending an email to the Seller then pick Party Member: Seller in the **With** field.

5. Click on the **Schedule** drop down to assign the correct date calculation as needed for each activity.
6. If you need to send a message then add an ACTION as needed.
7. Press the **Save** button to save this action.
8. Repeat steps 1-7 for each activity item on your list.

Please reference the WorkflowTutorial.pdf for detailed information on creating workflows.

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

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Questions?

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