

OnBoard Day 23 - Activity Actions w/o Checklists

Today's training will be over the **Action** feature.

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 but only 1 action is run at a time. 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
- Facebook
- SMS Text
- LinkedIn
- Tweet

- **Add/Remove Tags**

- Adding Tags
- Removing Tags

- **Starting another Workflow**

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 'Action' configuration interface. At the top, there is a header 'Action' and a button 'Create Actions...'. Below this, the form is organized into sections: 'Title*' with a text input field containing 'Send Email'; 'Send a message' with three dropdown menus (the first is 'Send automatically', the second is 'Send an email message', and the third is 'Realvolve User - Introduction'); 'Add and/or remove tags' with two tag input fields (the first contains 'Current Client' and the second contains 'Lead'); and 'Start a new workflow' with a dropdown menu containing 'Choose a workflow'. At the bottom, there is a checkbox labeled 'Action for incomplete checklist.' and two buttons: 'Save' and 'Cancel'.

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, Facebook, SMS Text LinkedIn 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.
- **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**
- **Facebook**
- **LinkedIn**
- **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.

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: 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.

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

Questions?

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

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