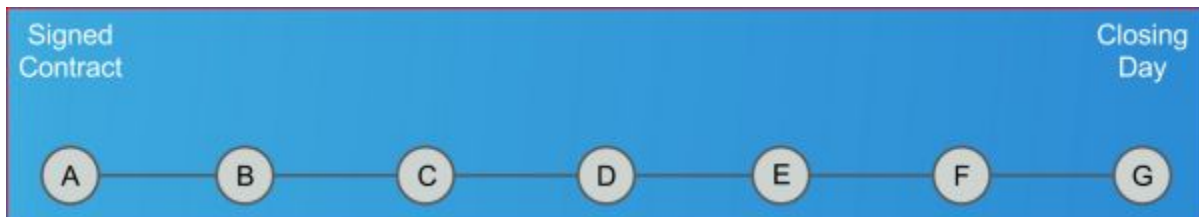


OnBoard Day 25 - Branching

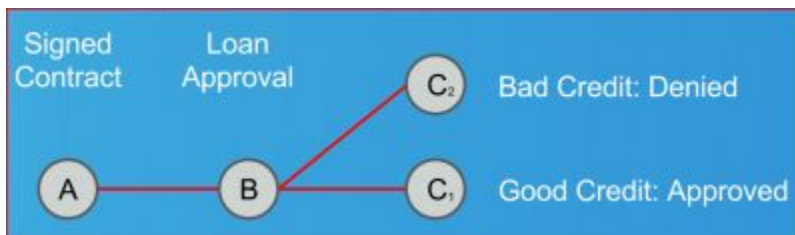
A typical action plan in other software takes you from point A to point G and reminds you of each tasks between. While that is good and necessary, the problem is that most transactions don't really work this way... There are hiccups that happen along the way forcing you to alter the plan. In most cases you have to manually change events to make it all work out and things can get missed.



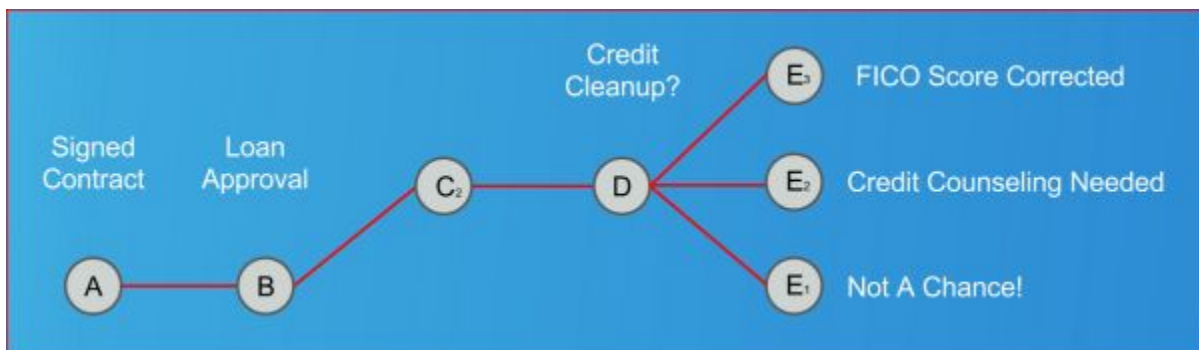
The last two training sections I touched on the concept of "**Branching**" which allows you to do more than a just a linear path shown above. It gives you a way to get from point A to point G but through a different route.

It is what I like to call an "**Alternate Reality**".

As an example, you might have a transaction workflow that starts out linear with a **Signed Contract** and get to **Loan Approval** but there is an issue. The Buyer has Bad Credit which prevents him from going the normal way to step D. This is where Branching comes into play...

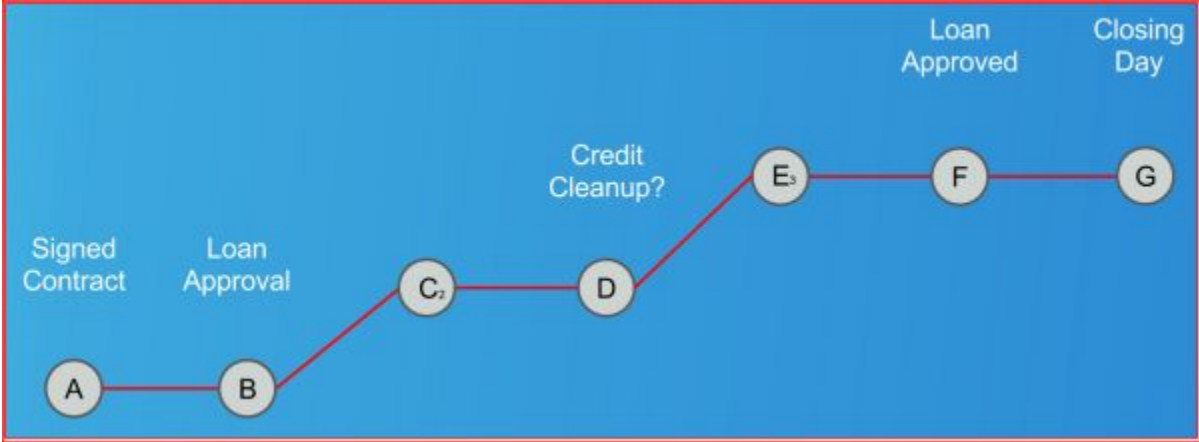


You can setup 2 Actions on one Activity and make a choice when you try to complete the activity. Action **C1** would continue through the process like a normal buyer but action **C2** would start a workflow to deal with the bad credit issue.



In this case you choose to run Action **C2**, a the "**Bad Credit Workflow**" which would kick in with a series of additional activities that prompts you through that process that allows for "**Credit Cleanup**".

Path **E1** might be needed if there is no possible way to continue... it's a bad buyer and the deal is dead so close out the process and start over. **E2** could be used if the buyer just needs a little credit counseling which would allow the process to finish once the counseling is complete. The **E3** option might happen if it was just incorrect reporting of the FICO score and a correction could be made with a simple phone call to continue on.

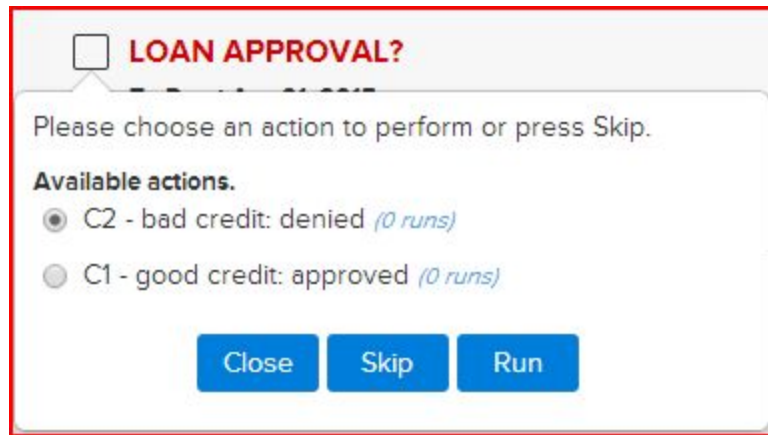


You are able to run Action **E3** which allows "**Load Approval**" to happen and ultimately reaching "**Closing Day**". The Realvolve workflows can handle different paths of processing, still going from point A to point G, to reach the ultimate goal.

Setting up this process is easy, using 2 Actions on 1 Activity. Each action launches a different workflow as needed. (you can have as many actions as needed in order to go to the next step)



When the activity comes due and you click the box to complete the task, a popup window showing the options of **C1** or **C2** as shown below. Choosing **C2 - bad credit: denied** would start the workflow for bad credit as described above then continue to the next step.



Refining each step in the process with as much detail as needed to take care of the steps required to finish the task will allow you to be more effective with your daily processes. Having a good plan to guide you through the hiccups like bad credit which happen on a regular basis will add customer confidence and satisfaction which leads to repeat business and referrals.

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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