A REALVOLVE HOW-TO | By Mark Stepp

OnBoard Day 26 - Starting A Workflow

We've been setting up workflows for the past few days and I'm sure you will continue to do so until all your processes are in place. The one thing I have not discussed is **STARTING** a workflow to get the activities into your calendar.

Currently there are 4 places that you can start a workflow: The Dashboard or the Radar tab of a Contact, Property or Transaction.

Typical Examples:

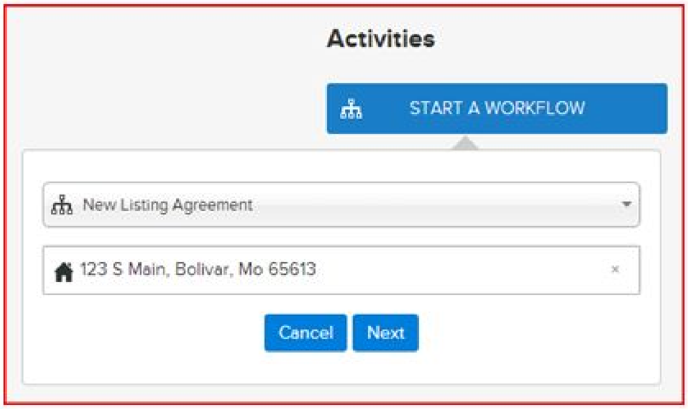
- After entering a new lead into the database you could go to the Radar tab of the contact and start a “**New Lead**” workflow.
- After adding a new Property, click on the radar tab and start a “**New Listing**” workflow.
- Once a transaction is created, click on the radar tab and start the “**Buyer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

What is the workflow wizard?

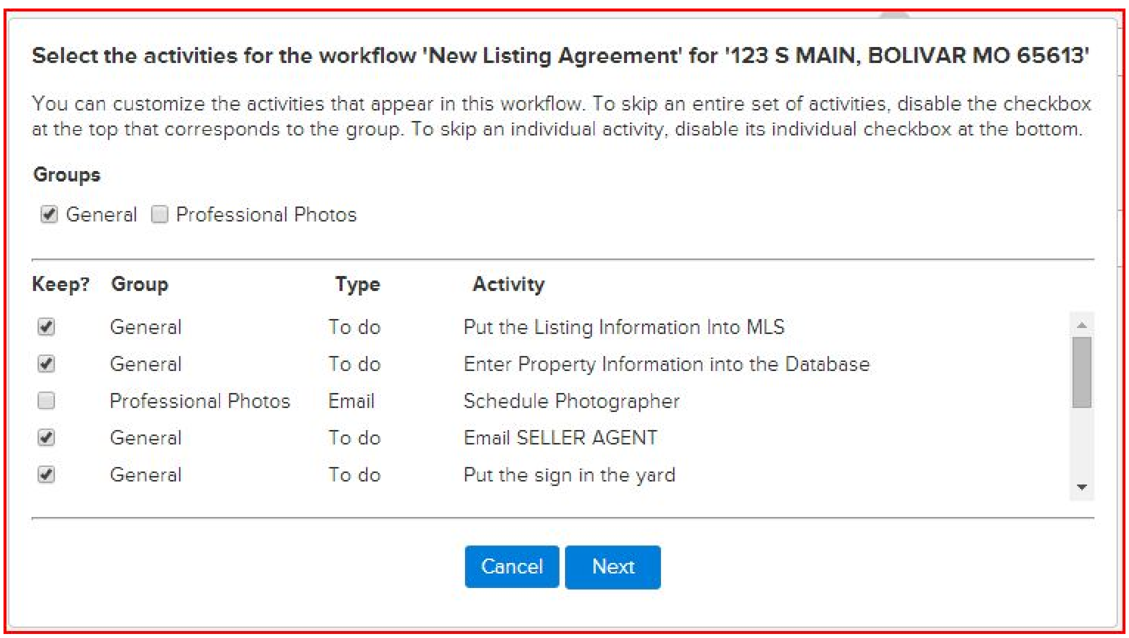
When you click on the “**Start a Workflow**”, the workflow wizard takes you through a series of screens which help you fill in the required information to begin the workflow. Depending on the requirements of each workflow the information shown in the wizard will be different. (SEE VIDEO)

Workflow Wizard Steps:

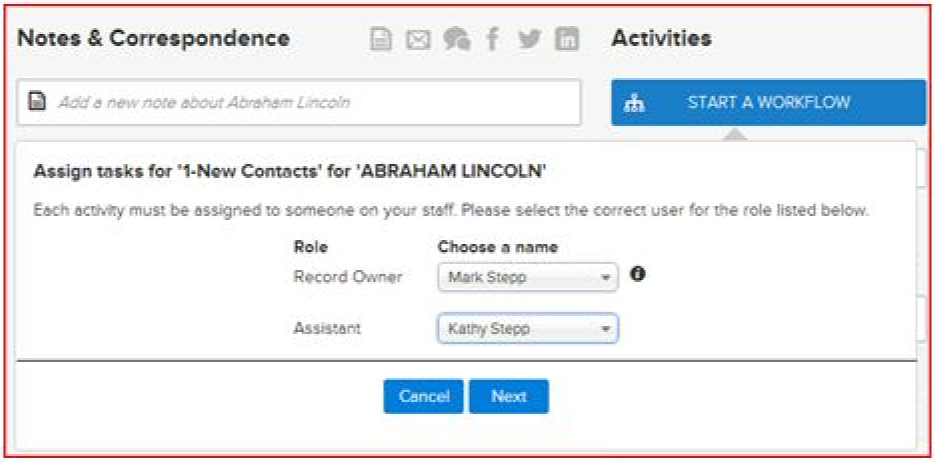
1. Click on **Start a Workflow**
2. Select a Workflow to Start (example: **New Listing Agreement**)
3. Select a Contact, Property or Transaction (example: **123 S Main, Bolivar, Mo 65613**)



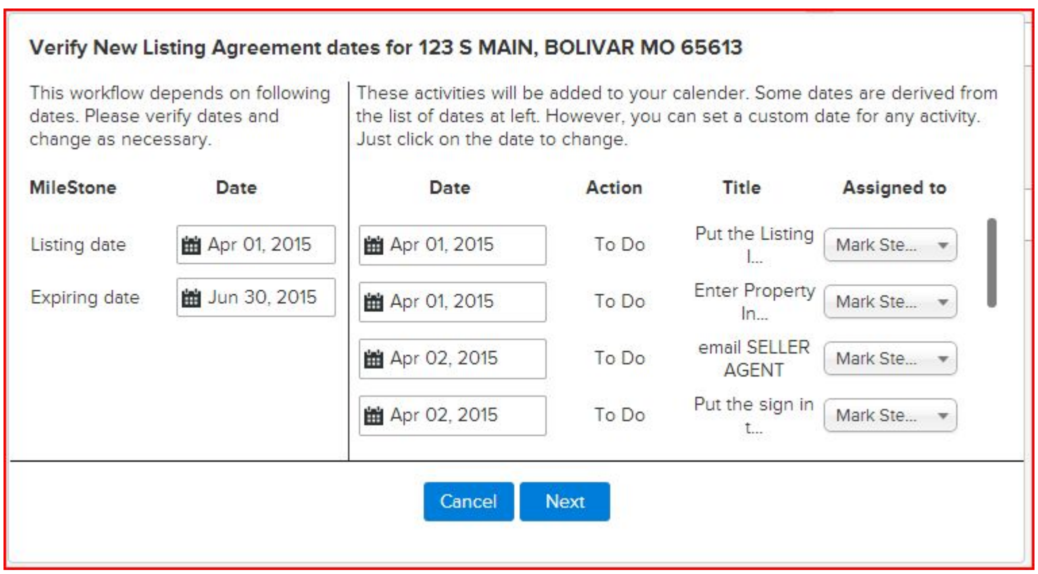
4. Deselect any unwanted workflow activities individually or by group (if any) - the example below has one activity that is in the "Professional Photos" group. If you know you don't want professional photos taken then uncheck the group and any activities in that group will be unchecked. You can assign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



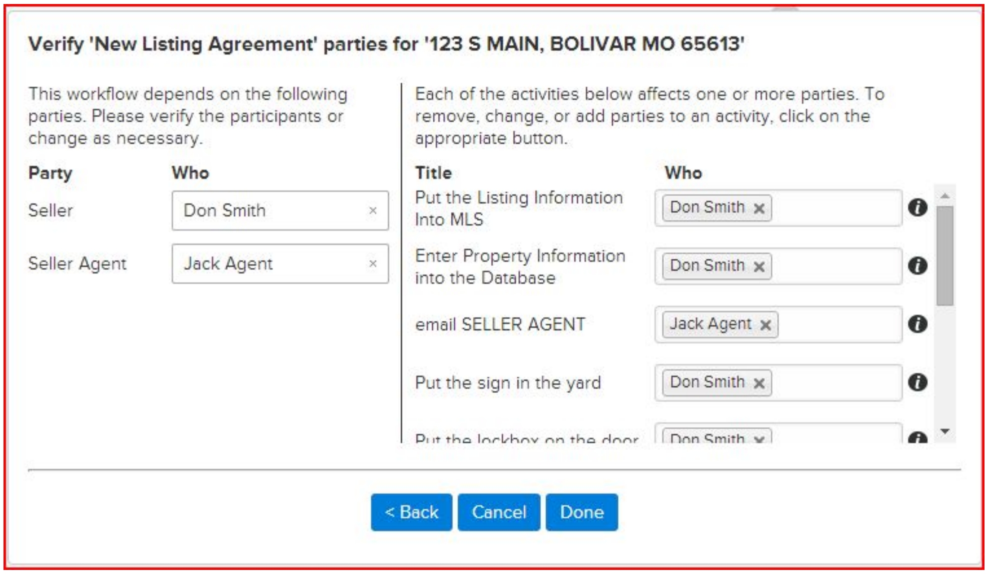
5. If Activities in the workflow use any of the 4 “assign to” place holders (Listing Agent, Buyers Agent, Assistant, Record Owner), an additional popup screen to select the “Assign To” fields which use those placeholders will display… (sample below)



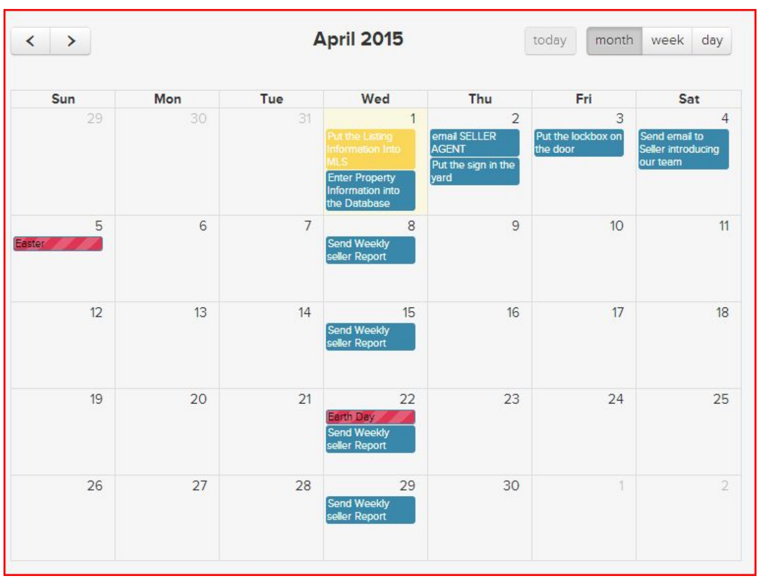
6. Enter milestone dates to calculate individual activity dates.
7. * Changes to milestone dates will recalculate activity dates (Click in to the date field to adjust)
8. * Changes to individual activity dates are allowed as needed (Click in to the date field to adjust)
9. * Changes to individual “Assigned to” as needed (Click the drop down arrow to select a User)



10. If property or transaction then allow user to select party members



11. 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.
12. Once all known party members have been selected then press **DONE** to complete the workflow wizard process which places the activities in the calendar.
13. 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.