

# OnBoard Day 26 - Starting A Workflow

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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.

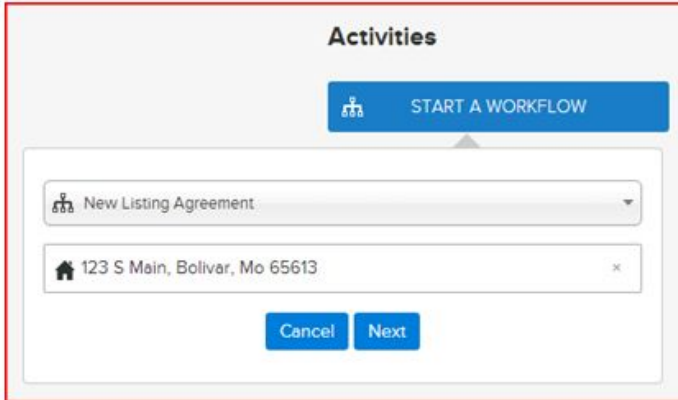
## What is the workflow wizard?

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](#))

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### 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**)



**Activities**

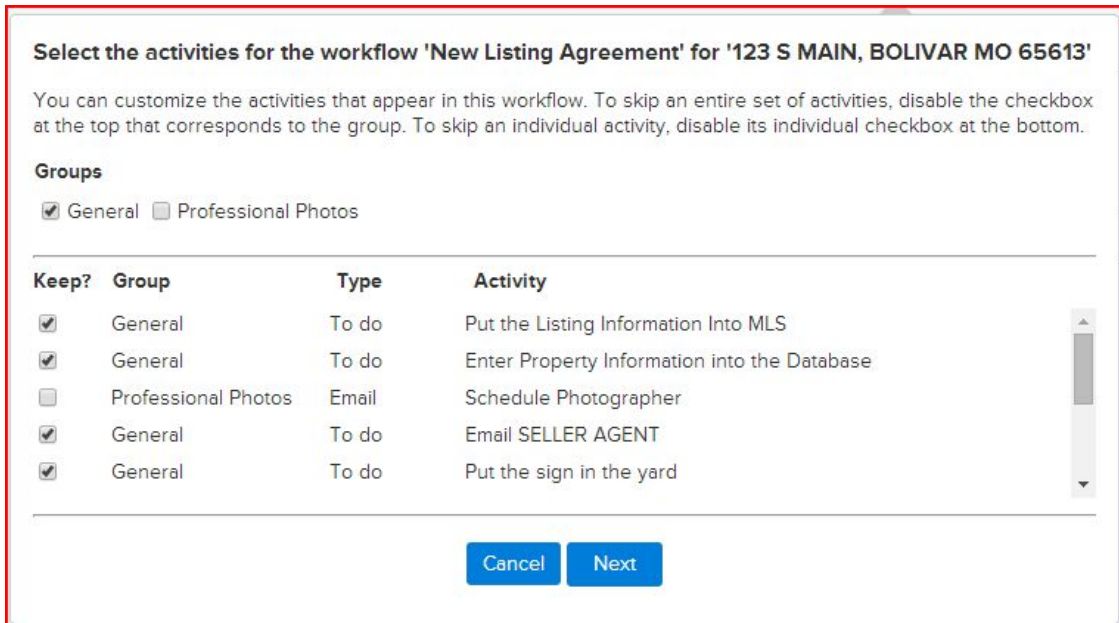
START A WORKFLOW

New Listing Agreement

123 S Main, Bolivar, Mo 65613

Cancel Next

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]**



**Select the activities for the workflow 'New Listing Agreement' for '123 S MAIN, BOLIVAR MO 65613'**

You can customize the activities that appear in this workflow. To skip an entire set of activities, disable the checkbox at the top that corresponds to the group. To skip an individual activity, disable its individual checkbox at the bottom.

**Groups**

General  Professional Photos

Keep?	Group	Type	Activity
<input checked="" type="checkbox"/>	General	To do	Put the Listing Information Into MLS
<input checked="" type="checkbox"/>	General	To do	Enter Property Information into the Database
<input type="checkbox"/>	Professional Photos	Email	Schedule Photographer
<input checked="" type="checkbox"/>	General	To do	Email SELLER AGENT
<input checked="" type="checkbox"/>	General	To do	Put the sign in the yard

Cancel Next

- 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)

The screenshot shows a software interface with a header 'Notes & Correspondence' and 'Activities'. Below the header is a text input field with the placeholder 'Add a new note about Abraham Lincoln' and a blue button labeled 'START A WORKFLOW'. The main content area is titled 'Assign tasks for '1-New Contacts' for 'ABRAHAM LINCOLN'' and includes the instruction: 'Each activity must be assigned to someone on your staff. Please select the correct user for the role listed below.' There are two rows of assignment options: 'Record Owner' with a dropdown menu showing 'Mark Stepp' and an information icon, and 'Assistant' with a dropdown menu showing 'Kathy Stepp'. At the bottom are 'Cancel' and 'Next' buttons.

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

The screenshot displays a screen titled 'Verify New Listing Agreement dates for 123 S MAIN, BOLIVAR MO 65613'. It is divided into two columns. The left column contains two rows: 'Listing date' with a date field set to 'Apr 01, 2015' and 'Expiring date' with a date field set to 'Jun 30, 2015'. The right column contains a list of activities with columns for 'Date', 'Action', 'Title', and 'Assigned to'. The activities listed are: 'Put the Listing l...' (Apr 01, 2015, To Do), 'Enter Property In...' (Apr 01, 2015, To Do), 'email SELLER AGENT' (Apr 02, 2015, To Do), and 'Put the sign in t...' (Apr 02, 2015, To Do). Each activity has a dropdown menu for 'Assigned to' with 'Mark Ste...' selected. At the bottom are 'Cancel' and 'Next' buttons.

MileStone	Date	Date	Action	Title	Assigned to
Listing date	Apr 01, 2015	Apr 01, 2015	To Do	Put the Listing l...	Mark Ste...
Expiring date	Jun 30, 2015	Apr 01, 2015	To Do	Enter Property In...	Mark Ste...
		Apr 02, 2015	To Do	email SELLER AGENT	Mark Ste...
		Apr 02, 2015	To Do	Put the sign in t...	Mark Ste...

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

**Verify 'New Listing Agreement' parties for '123 S MAIN, BOLIVAR MO 65613'**

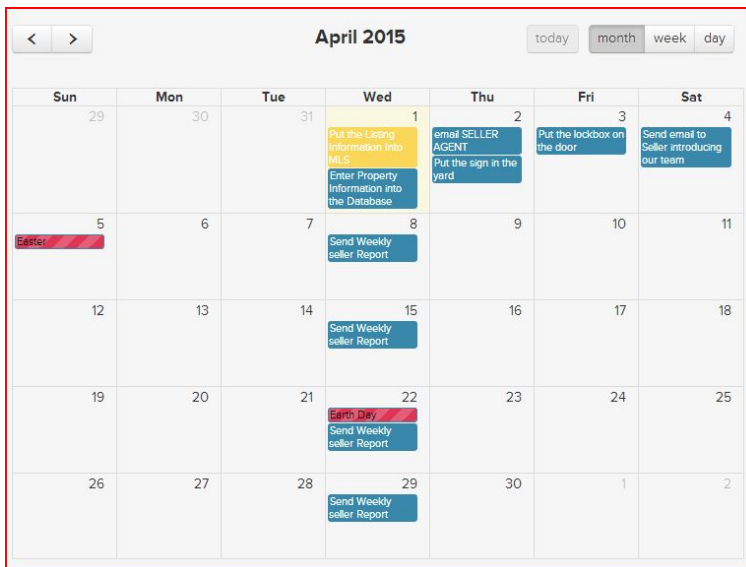
This workflow depends on the following parties. Please verify the participants or change as necessary.

Party	Who	Title	Who
Seller	Don Smith	Put the Listing Information Into MLS	Don Smith
Seller Agent	Jack Agent	Enter Property Information into the Database	Don Smith
		email SELLER AGENT	Jack Agent
		Put the sign in the yard	Don Smith
		Put the lockbox on the door	Don Smith

Each of the activities below affects one or more parties. To remove, change, or add parties to an activity, click on the appropriate button.

< Back Cancel Done

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](mailto:support@realvolve.com)

Questions?

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

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