

OnBoard Day 27 - Auto-Email

Well, you have made it through the tough stuff... Workflows, Checklists, Actions and Branching and even starting the workflow so that the activities are in your calendar. The last important feature to cover is **Auto Sending**. Once you are rolling with actions on activities to send emails and messages, your calendar will start filling up with tasks that need to be done. Using Actions to automatically send message templates while you are away will free up your time. Allowing you to spend more time with your family and less time "working your database".

To turn on automated messages go to **SETTINGS > EMAILS**

The screenshot shows the 'Auto Email Send Setting' page. At the top left is a mail icon followed by the word 'Emails'. Below that is the section title 'Auto Email Send Setting'. Underneath the title is a checkbox labeled 'Automated messages' which is checked. To the right of the checkbox is a dropdown menu showing '9:00am'. At the bottom of the page is a blue button labeled 'Update'.

Make sure the "**Automated messages**" option is **CHECKED** (ON) to allow the system to run automatically and that you have assigned a time of day for processing messages that are not assigned times.

Tasks that are assigned dates but not specific times will wait until the selected time before sending each day. If a task is assigned the current date and the time has already passed then it will send the

message at the next 10 minute interval. The example shown here will send tasks automatically at 9:00am in your selected time zone.

Any activity in your calendar with an assigned date and time will process that message at the specified time within a 10 minute window.

There are some **RULES** when setting up automated messages:

1. The Activity MUST NOT have Checklists - If an activity uses a checklist, the checklist must be completed before the message can be sent (excluding incomplete checklists actions)
2. The Activity MUST HAVE ONLY 1 Action - If an activity has more than one action then the user must select which action to run.
3. The Activity MUST HAVE the send a message option set to "Send Automatically" or "Send Immediately" in the Action.

“Send Automatically” will send the message on the assigned day at the assigned time or default time.

“Send Immediately” will send the message as soon as the Activity is added to the calendar and automatically complete the activity. This is useful for the first activity of a workflow from a Zapier.com generated workflow.

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

Questions?

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

© 2015, Realvolve, LLC. All rights reserved.