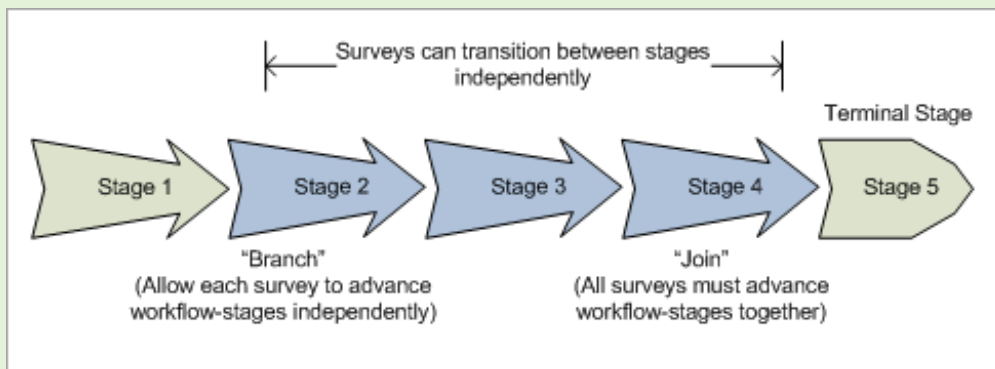# Create Workflows With Branching

Workflow stages have actions that transition questionnaires to different stages. Typically, questionnaires advance through stages 1, 2, 3, and so on, but returning to previous stages is common. Review or Approval stages, for example, might include a 'Reject' action that reverts to an earlier workflow stage.

When you create a custom workflow template, specify the number of stages you would like and end with a Terminal stage. Each stage includes notifications and other options. While planning your workflow template, decide which stages will allow questionnaires to advance independently and which will not.

EXAMPLE

In a five-stage workflow, you want to allow independent movement in stages 2 through 4. Set stage 2 to "branch" and stage "4' to "join" by selecting the **Allow each questionnaire to advance workflow-stages independently** option in stage 2 and the **All questionnaires must advance workflow-stages together** option in stage 4.

Rules

1. Every "branch" stage (**Allow each questionnaire to advance workflow-stages independently**) must have a matching "join" stage (**All questionnaires must advance workflow stages together**) later in the workflow.

2. A workflow can have more than one branch-join pair, but they cannot overlap.

EXAMPLE

Correct: **1 - 2 (branch) - 3 - 4 (join) - 5 - 6 (branch) - 7 - 8 (join) - 9 (terminal)**

Incorrect: **1 - 2 (branch) - 3 - 4 (branch)**
Solution: **Join the first branch before starting second branch**

3. A "branch" stage (**Allow each questionnaire to advance workflow-stages independently**) can have actions that transition to stages before the branch stage, but no questionnaire can to advance past the "join" stage until all questionnaires have reached the "join" stage.

4. Stages after a "join" stage (**All questionnaires must advance workflow-stages together**) cannot have actions that transition to stages before the "join" stage.