

OnBoard Day 24 - Activity Actions with Checklists

In the last training session, I explained Actions without checklists and how easy it was to send emails, change tags and start other workflows from an activity. If that was all that Actions could do, it would be a valuable feature but only slightly better than other CRM and time management systems. Today I will show how actions in Realvolve go beyond the normal action plan features found in other systems...

Today's topic is on **Actions With Checklists** and how to use them. Checklists alone are nice because they allow you to group required elements of an activity together as one unit. To complete the activity all elements of the checklist have to be completed. But what happens when those elements can not be completed? The activity itself isn't complete, so now what? That is where **incomplete checklist Actions** come into play. When an activity uses checklists and some of the checklist items are not complete, you have the ability to setup actions for incomplete checklists.

Located at the bottom of the Action popup window is a checkbox labeled: **"Action for incomplete checklist"**

Leaving it unchecked (*default setting*) means that the action can run when

there are no unresolved items in the checklist. By placing a checkmark in this option it indicates that you need to perform an action in order to complete the remaining checklist items. Just like normal actions, you can have as many incomplete checklist actions as needed in order to handle the exception properly.

Action for incomplete checklist.

Save Cancel

Action for incomplete checklist.

Reschedule in days

Save Cancel

In addition to performing the action, incomplete checklists can also specify when to reschedule the activity by entering the specified number of days from today. The example above would perform the actions as needed and then reschedule the activity 3 days from today so you can have time to complete the remaining checklist items.

One use for this feature would be for an activity that has a checklist of required documents to list a property. Assume that you have a checklist of 3 items attached to the activity:

- Signed Listing Agreement
- Signed Seller Disclosure
- Signed Marketing Plan Agreement

If you did not have all 3 documents, an email could be sent to the seller requesting the necessary documents, add a TAG to the property indicating **"Missing Documents"** and then reschedule the activity **3** days later as a reminder.

To make this work, you would need to setup a template called **"Missing Documents"** that is used with "Property" and contained the basic message requesting that the seller forward you the required documents (see sample below). In that template, you would also want to list the required documents so that the seller knew what to send back to you. To do that, a special merge field can be used which pulls checklist items from the activity:

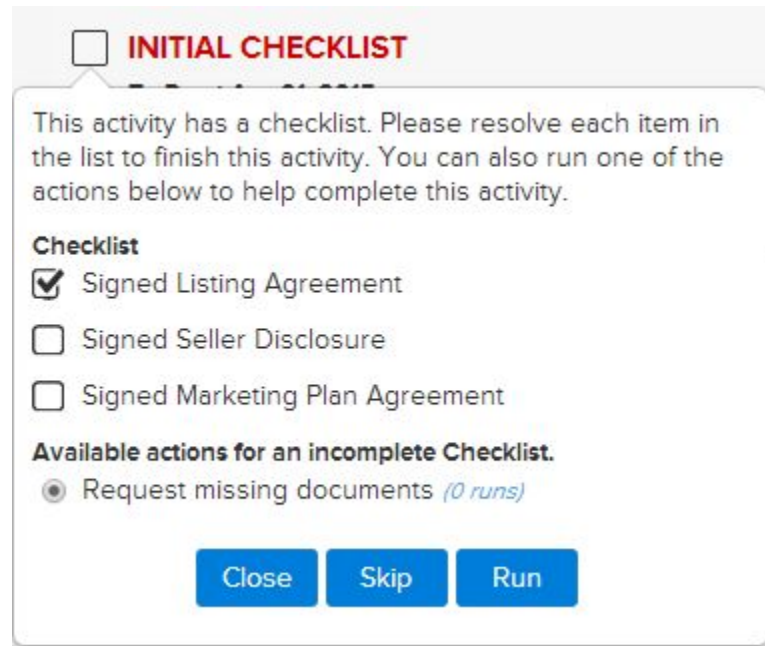
[[Activity:Checklist#Incomplete]]

This merge field will look at the activity checklist to retrieve the Incomplete items (unchecked) and place them in a bulleted list in the email.

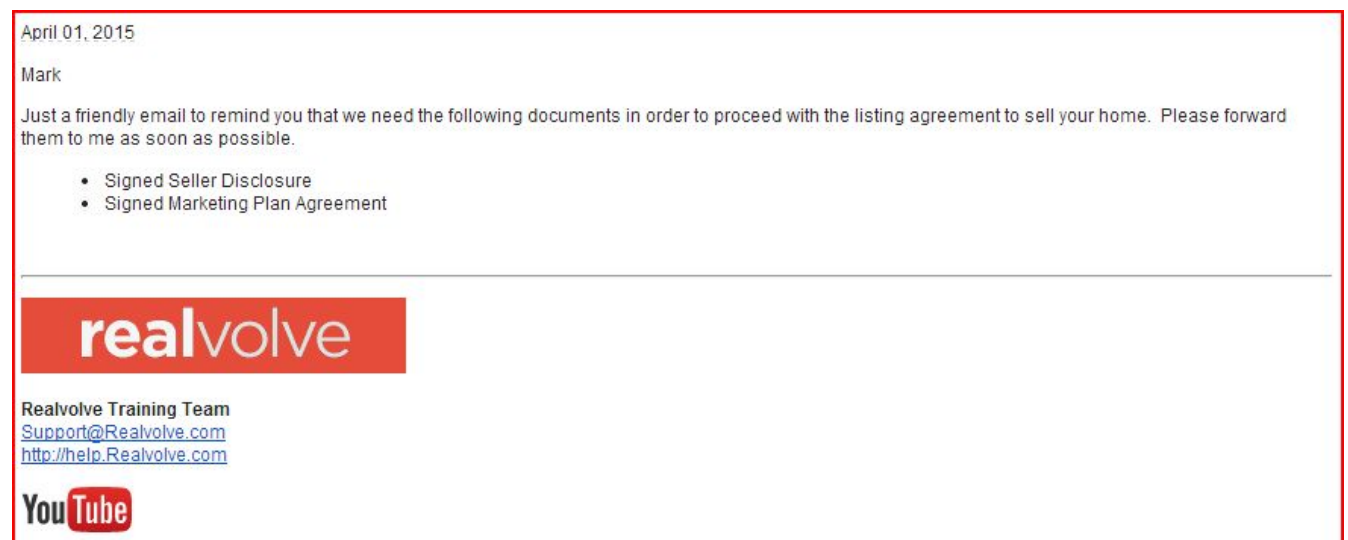
When the activity comes due on your calendar, click on the box to complete the activity as usual. A popup window will display the checklist of required items so that you can place a checkmark next to each document that you have in your possession. If there are any unresolved items in the checklist

The screenshot shows a 'Create Actions...' dialog box. At the top, there's a 'Title*' field with the text 'Request Missing Documents'. Below that is a 'Send a message' section with three dropdown menus: 'Send automatically', 'Send an email message', and 'Missing Documents'. The 'Add and/or remove tags' section contains a tag 'Missing Documents' with a plus icon and a 'Choose tags to remove' option. The 'Start a new workflow' section has a dropdown menu 'Choose a workflow'. At the bottom, there's a checkbox 'Action for incomplete checklist.' which is checked, and a 'Reschedule in 3 days' field. 'Save' and 'Cancel' buttons are at the very bottom.

then the **"Available actions for an incomplete Checklist"** will show in the run section below the checklist and list all actions that have the "Action for incomplete checklist" option selected. The system will also show how many "runs" the action has performed. If this is the first time to complete the activity then it will say *(0 runs)*. Each time you run the action the count will go up by 1. Use this information to help decide which action to run if multiple actions are available. It's possible that you could run it 2 times and then send a different email on the 3rd time which stated the importance of getting the documents in before a deadline.



Running this action will send the following email and add the tag **"Missing Documents"** to the assigned property then reschedule the activity to be 3 days from today.



The template below was used to create the email:

Template Editor

Title* Missing Documents

Tags  Assign one or more tags (optional)

Use with* Property

Via Email

Subject* Please forward the following documents

 Aa   a↑ B I U               </>

[[CurrentDate]]

[[Greeting]]

Just a friendly email to remind you that we need the following documents in order to proceed with the listing agreement to sell your home. Please forward them to me as soon as possible.

[[Activity:Checklist#Incomplete]]

[[Signature]]

Using Checklists and Actions together will help streamline your daily processes and confirms that important items do not get overlooked.

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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