A REALVOLVE HOW-TO | By Mark Stepp

Activity Actions with Checklists

Basics: All Users

In the last training session, I explained Actions <u>without</u> 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 <u>With</u> 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.

🖉 Actio	on for incon	nplete checklist.
Resche	dule in 3	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.

Action for incomplete checklist.



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]]

'itle*	
Request Missing Documents	
end a message	
Send automatically	•
Send an email message	
Missing Documents	
-	
Missing Documents×	
-	
Missing Documents× Choose tags to remove	
Missing Documents× Choose tags to remove	
Choose tags to remove	

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.

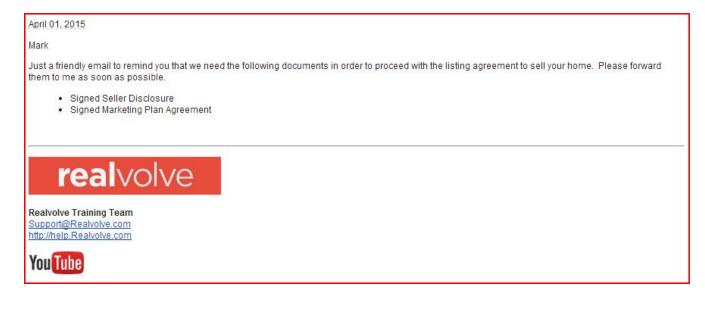
When the activity comes due on your calendar, click on the box to complete the activity as usual. A popup window will display the checklist of required items so that you can place a checkmark next to

each document that you have in your possession. If there are any unresolved items in the checklist 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.

tł	his activity has a checklist. Please resolve each item in ne list to finish this activity. You can also run one of the ctions below to help complete this activity.
C	hecklist 3 Signed Listing Agreement
C] Signed Seller Disclosure
C	Signed Marketing Plan Agreement
A	vailable actions for an incomplete Checklist. Request missing documents (0 runs)
	Close Skip Run

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:

Title*	Missing Documents	Tags	Assign one or more tags (optional)	Ŋ
se with*	Property	Via	Email	
Subject*	Please forward the following documents			
¶ _. Aa	n <u>A</u> MA at <u>B</u> I <u>U</u> ∓ ≔ ≔ ≔			
		• • •	≞, ∞, ≡, –	
[[Currer	ntDate]]			
[[Currer [[Greetii Just a fi	ntDate]] ng]] riendly email to remind you that we need the followi	ing documer	nts in order to proceed with the listing	g
[[Currer [[Greetii Just a fi	ntDate]] ng]]	ing documer	nts in order to proceed with the listing	g

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?

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