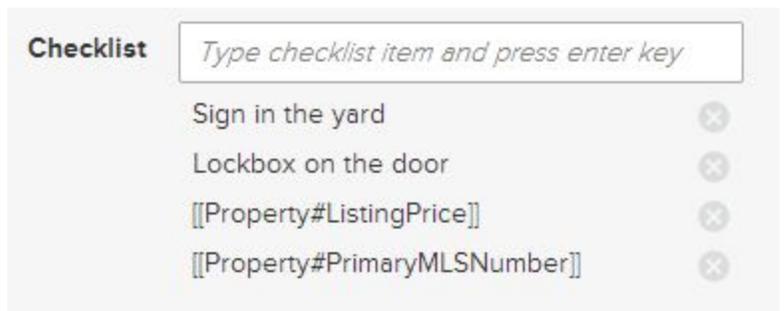


Activity Checklists

Basics: All Users

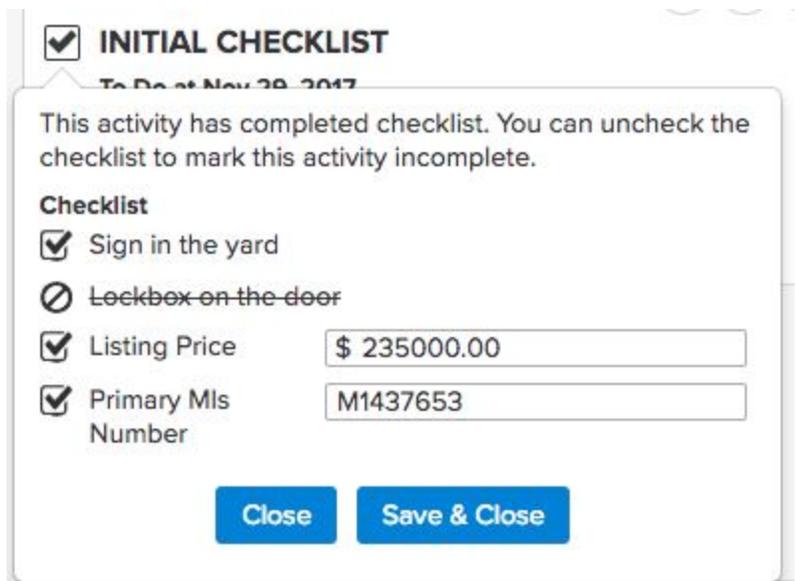
A checklist is simply a list of items attached to an activity which must all be "checked off" in order for the activity to be considered "complete". Other CRM systems require individual activities for each checklist item but that clutters the calendar. In Realvolve, multiple checklist items can be setup in a single activity like **"Sign in the yard"**, **"Lockbox on the door"** or can contain database merge fields, a unique feature of Realvolve, to view or edit the content of individual database fields.

The example to the right shows two plain text checklist items and two database merge field checklist items indicated by double brackets.



When the activity comes due and you click on the box to complete it, the checklist will be displayed. The plain text items will show as normal checklist entries and the database merge field items will show the current value of the designated field to allow changes if needed.

For database field items, click in the data entry box located to the right of the field name to make changes to the



field value. Clicking in the square box to the left of the item description will place a checkmark in the box indicating that the item has been verified as complete. Clicking a second time on a box will indicate that the item is not needed showing a circle slash and the checklist item will be marked out.

When no unchecked items exist, the activity is considered complete and the activity checkbox will contain a checkmark. Press the [**Save & Close**] button to save the field values from the database checklist items. The [**Close**] button is available to close the popup without saving any changes to the database merge fields.

([SEE VIDEO](#))

The **Database Field “MERGE FIELD”** feature allows specific fields in Realvolve to be verified without having to search the data entry screens manually. User entry can be cut to a fraction of the normal time allowing new uses to validate fields easily.

Drag / Drop reordering of checklists items are available ([SEE VIDEO](#))

NOTE: *The example above uses checklists **Without** Actions. I will cover checklists **With** Actions in **Basics 21: Activity Actions with Checklists.***

Use the following link to see the segment of the video where checklists are described ([SEE VIDEO](#))

Please reference the [WorkflowTutorial.pdf](#) for detailed information on creating workflows.

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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