

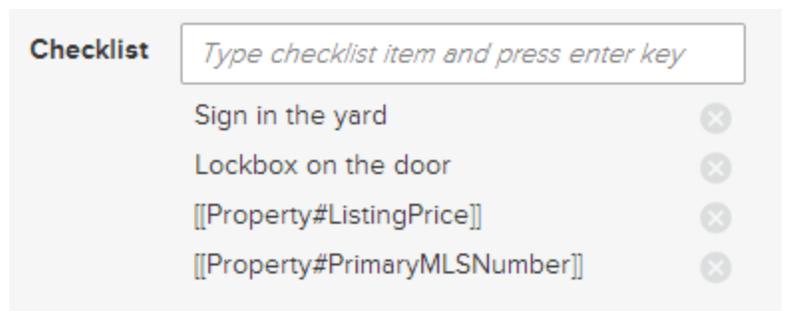
OnBoard Day 22 - Activity Checklists

Today's training will cover **Activity Checklists** and how to use them. It was described in yesterday's training video, but you may have missed it or just didn't understand how to use it, so I will go into more detail today.

What is a checklist?

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 completed. Other CRM systems require individual items for each checklist item but that clutters the screen. In Realvolve, multiple checklist items can be setup in a single activity as plain text like "Sign in the yard", "Lockbox on the door" or can contain database fields, a unique feature of Realvolve, to view or edit the content of individual database fields.

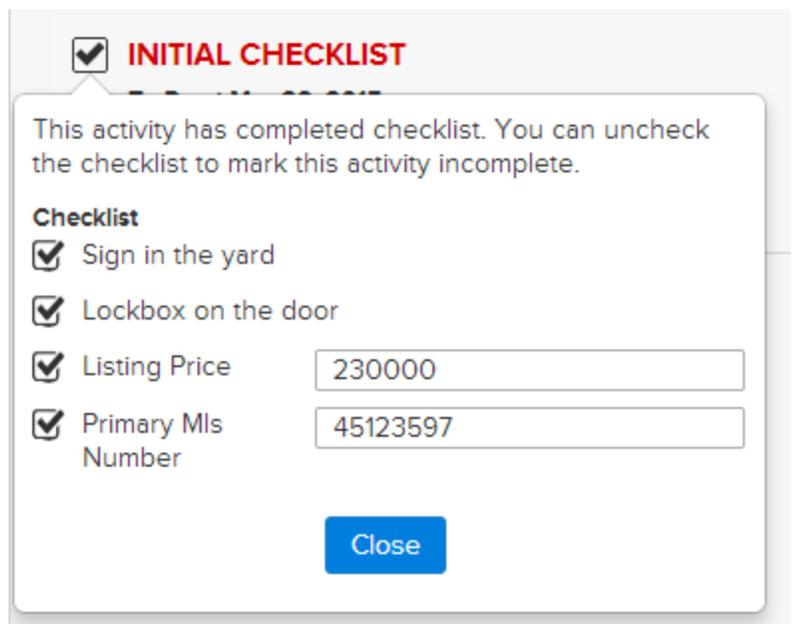
The example below shows two plain text items and two database field items:



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

For database field items, simply click into 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 [**Close**] button to save the field values from the database checklist items.

The **Database 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 beginning users to validate fields easily.

NOTE: *The example above uses checklists **Without** Actions. I will cover checklists **With** Actions on **Day 24**.*

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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