

# Checklists

09/29/2025 10:25 am CDT

## Overview

Checklists show up on the **My Schedule** page when a User first logs into the web. This complements having checklists presented on the home menu page in the app. Checklists are listed on the associated user's details page in a new tab (all of the additional details on this page are now tabbed).

This article will review:

- [Settings and Navigation](#)
- [Kinds of Checklists](#)
- [Assign a Checklist](#)
- [Attaching Checklists to Appointments and Proposals](#)
- [Review Checklist Details](#)
- [FAQs](#)

## Video Tutorial



Note: The checklists have been updated since this video was filmed. You now have the option to allow users to save their progress on a checklist. This is enabled by editing the checklist and checking the box labeled "Save Progress?"

Save Progress?  Allow saving progress

## Settings and Navigation

To add a checklist, go to **Control Panel > Checklists > Add**.

Add a Checklist

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Name\*

Active?

Kind\*

Scope  
 Lead Service Agents Only

Require Signature?

Save Progress?  
 Allow saving progress

#	Description	Type	Active?
...	<input type="text"/>	<input type="button" value="Checkbox ▾"/>	<input checked="" type="checkbox"/>

Configure the following settings on the checklist:

- **Name** the checklist
- Make sure the **Active** box is checked for it to be available for use
- Select the **Kind** of checklist (see below for more information)
- Set the scope. Are additional service agents able to complete the checklist, or lead agents only?
- Require a signature
- Allow saving of progress

## Kinds of Checklists

The "Kind" field is required and designates the type of checklist you want to create. Choose from the following options:

Kind\*

Daily (appointments)  
 After Clock In  
 After Last Appointment  
 Ad hoc  
 Daily (open)

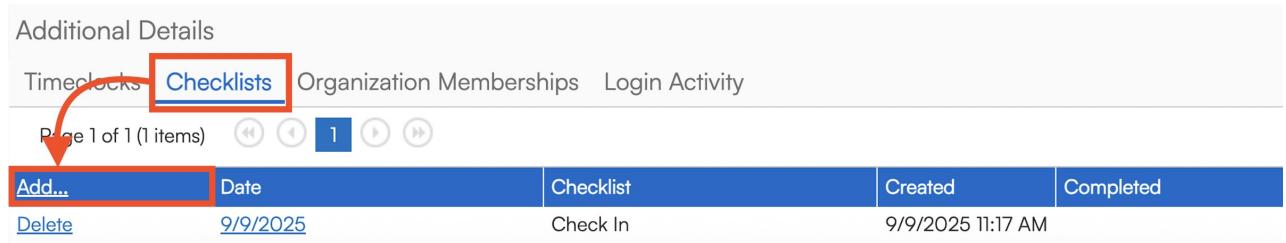
- **Daily (Appointments)** - This will create they check list for any service agent who has appointments on their schedule for that day
- **After Clock In** - "Pre Flight" type checklist. This check list will show to the service agent after they clock in for the day. Designed for "to do" list of items to be done after clock in and before service agent leaves the shop for the day.
- **After Last Appointment** - "Post Flight" type checklist. This check list will show to the service agent after they complete their last appointment of the day. Designed for "to do" list of items to be done at the end of the day before the agent clocks out for the day.
- **Ad hoc** - One time checklist that can be assigned to any user. To do this, just go to the user's details page (Control Panel > Users) and then click on the Add...link in the checklists grid. You'll be prompted to select a checklist. The user will then have a new checklist assigned with today's date to complete. You can also set a date when assigning checklists. Ad Hoc checklists can also be added to proposals. These are handy for

different stages of a project such as permitting and material ordering up front or specific post-job walkthrough checks. To add a checklist to a proposal, just click the new Add Checklist menu icon and choose a checklist and a user to assign it to.

- **Daily (Open)** - This will create the check list for any service agent who logs in regardless of whether they have any appointments assigned for that date. The (open) label refers to this only creating the checklist if there is any defined availability for that day (i.e., M-F or M-S depending on your service agent time slots).

## Assign a Checklist

To manually assign an ad hoc checklist to a particular user, view their User details page in **Control Panel > Users**. Click on the **Checklist** tab in the **Additional Details** section at the bottom side of the page, and click **Add**.



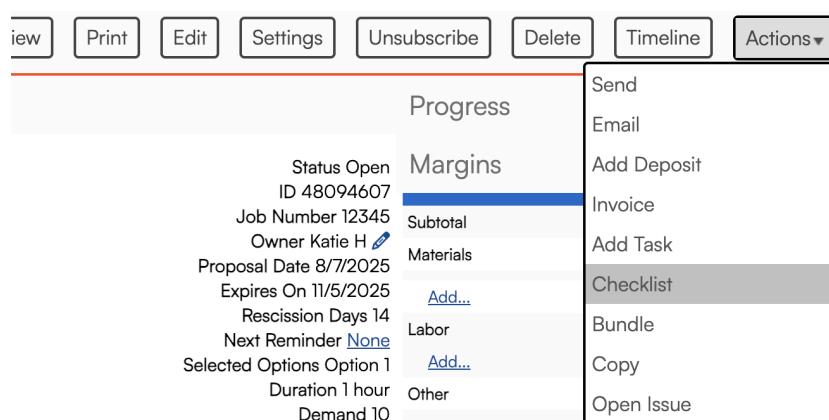
The screenshot shows the 'Additional Details' section of a user's profile. At the top, there are tabs for 'Timeclocks', 'Checklists' (which is highlighted with a red box and has a red arrow pointing to it), 'Organization Memberships', and 'Login Activity'. Below the tabs, it says 'Page 1 of 1 (1 items)' with navigation buttons. A table follows, with the first column 'Add...' also highlighted with a red box. The table columns are 'Date', 'Checklist', 'Created', and 'Completed'. The first row shows '9/9/2025', 'Check In', '9/9/2025 11:17 AM', and an empty 'Completed' field.

Checklist options will appear at the top of the page. Choose the checklist you want the user to complete and set an assignment date, then click **Save**.



The screenshot shows a 'User' profile with buttons for 'Telemetry', 'Impersonate', 'Edit', and 'Delete'. Below it is a 'Add a Checklist' section. It has a dropdown 'Activity\*' set to 'Check In' with a dropdown arrow, and a date input field set to '09/09/2025'. At the bottom are 'Save' and 'Cancel' buttons.

You can also attach ad hoc checklists directly to a proposal by viewing the proposal details page and clicking **Actions > Checklist**.



The screenshot shows a proposal details page with various buttons: 'New', 'Print', 'Edit', 'Settings', 'Unsubscribe', 'Delete', 'Timeline', and 'Actions'. The 'Actions' button is highlighted with a red box. A dropdown menu is open, listing options: 'Send', 'Email', 'Add Deposit', 'Invoice', 'Add Task', 'Checklist' (which is highlighted with a gray box), 'Bundle', 'Copy', and 'Open Issue'. The proposal details include: Status Open, ID 48094607, Job Number 12345, Owner Katie H, Proposal Date 8/7/2025, Expires On 11/5/2025, Rescission Days 14, Next Reminder None, Selected Options Option 1, Duration 1 hour, and Demand 10.

From there, you select the checklist, the user, and the due date.

## Proposal

### Add a Checklist

Activity\*

Ad Hoc Test ▾

User\*

Al B. Right ▾

Date

9/9/2025

Click save. Then, you can review it towards the bottom of the page between Appointments and Attachments sections..

### Appointments

[Attach appointment...](#)

### Checklists

Ad Hoc Test - Tue, Sep 9, 2025 at 11:28a

Al B. Right

Tue, Sep 9, 2025

[Delete](#)

### Attachments



## Attaching Checklists to Appointments and Proposals

Making sure certain tasks are accomplished during an appointment, whether it's an estimate, an installation or a service, is key to customer satisfaction.

### To attach a checklist to an appointment:

1. From an appointment details page, select the **Checklists** tab in the **Details** section.
2. Click **Add**, select your desired checklist, and **Save**.
3. When the appointment is started, your agent on the Mobile App will need to complete the checklist before the appointment can be finished.

Scheduled Appointment

Contact [Stacey Fakename](#)

Service Example Service

Scheduled Start [Wednesday, September 10 at 9:00a](#)  Confirmed

Scheduled Duration 30 mins

Quantity 1

Primary Phone (303) 902-2700 |  
Where 5678 Main Street | Austin, TX 78703

Service Agent [Al B. Right](#)  
Actual Start Not started

Details

Item	Description	Qty	Rate
Example Service	This service line item cannot be taxed.	1	\$0.00

Additional Details

[Map](#) [Notes \(0\)](#) [Custom Fields](#) [Recurring Appointments](#) [Pictures](#) [Videos](#) [Documents](#) [Audits](#) [Forms](#) [Checklists](#)

## To create a Proposal-Attached Checklist:

1. Go to your proposal and click **Actions > Checklist**
2. Choose your checklist, user and date. Save it.

Settings Unsubscribe Complete... Delete Timeline Actions ▾

Status Accepted  
ID 48743950  
Owner Katie H

Proposal Date 8/27/2025  
Accepted Date 8/27/2025   
Rescindable Until 9/10/2025  
Next Reminder [None](#)

Selected Options TEST OPTION  
Duration 1 hour 20 mins

Margins

Subtotal  
Materials [Add...](#)  
Labor [Add...](#)  
Other [Add...](#)  
Margin  
Slide Deck

Send  
Email  
Change Order  
Add Deposit  
Invoice  
Add Appt  
Add Task  
Checklist  
Bundle  
Copy

This checklist will appear in the **Checklists** section of **My Schedule** for the assigned user on the chosen date.

### My Schedule

#### Checklists

Check In - 9/9/2025

## Mobile App Checklists

Here is an example of what it looks like when a checklist is attached to an appointment (on the web and the app).

Started Appointment

1 Weekly Example \$0.00 \$0.00

Occurs weekly for 10 weeks.

Subtotal \$0.00

Total \$0.00

Duration 45 minutes

Additional

Future Appointments 1 >

Past Appointments 30 >

Contact Pictures 5 >

**Checklists**

Ad Hoc Test - Wed, Nov 20 >

Take 1 After Pictures >

2 Pending Transactions

Finish >

## Review Checklist Details

Checklists are meant for internal use so we don't have a method of displaying that information on a custom appointment report that shows to the customer.

In the **Snapshots** section of the menu, you will see a tab for **Checklists** where you can review Open and Completed checklists. You can also download a .csv file to review the details of your checklists that way. If a checklist was connected to an appointment or proposal, you can see those details in the grid, as well as the due date, name of the checklist, user it is assigned to, creation date, and completion date.

Checklists

Open All

25 ▾

Page 1 of 1 (11 items) 1 of 1 >

Search...

Due	Checklist	For	Contact	User	Completed	Created
9/9/2025	Ad Hoc Test	Test Service 8/7/2025	Fred Rogers	Al B. Right		9/9/2025 11:28a
9/9/2025	Check In			Al B. Right		9/9/2025 11:17a
12/10/2024	First Appointment Checklist			Barb Dwyer		12/10/2024 2:35p
12/10/2024	Example Appointment			Barb Dwyer		12/10/2024 2:35p

## FAQs

### What if I want checklist results to show up on our Appointment report to the customer?

We do have the ability to turn checklist items into Appointment **Custom Fields** and tie them specifically to a specific service or part you may use for that appointment. Then we would add those custom fields to the appointment report so the customer would be able to see the responses.

A few things to consider when making these custom fields will be:

- Will this checklist only apply to a certain service or only apply when a specific part is added to a service?
- What phase of the appointment will this checklist be required to complete (start or finish)?
- Will these be required to be filled out?

### **Are we able to create a checklist for a specific service appointment?**

Yes, there are a few ways you can accomplish this. The most straightforward option is to use [Appointment Custom Fields](#). These can be set up as checkboxes, dropdowns, or text fields to reflect your checklist items, and they can now be filtered so they only appear for specific services (such as Preventative Maintenance).

Another option is to use a [drip trigger](#) to assign a checklist or create a task for a User when that type of appointment is scheduled. However, these checklists or tasks would be tied to the User, not directly to the appointment itself.

Using Appointment Custom Fields is typically the best method if you want the checklist to be tied directly to the appointment and only show when it's relevant.

**None of the service agents can see a checklist on any proposal created. The only place I see the checklist is on the Home screen of the Mobile App.**

For checklists the behavior is for it to show on the homes screen of the app, so that part is correct. Depending on where the agents need to see and access this information, a checklist may not be the functionality that works best.

You can create contact, appointment, proposal, or proposal line [Custom Fields](#). As an example, a contact field will show on the contact page, proposal on proposals, appointments on appts, and then the proposal lines show up in the line items in the proposal (like the service/part line.)

If you decide that custom fields are better suited to the workflow, you'll have to create them one at a time and match them up to the checklist items.

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