

Checklists

09/09/2025 1:05 pm CDT

Overview

Checklists show up on the **My Schedule** page when a User first logs into the web. This compliments 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

Name*

Active?

☐

Kind*

✓ Daily (appointments)

After Clock In

After Last Appointment

Ad hoc

Daily (open)

Scope

only

Require Signature?

| # | Description |
|---|-------------|
| ⋮ | ✕ |

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)

Scope

only

Require Signature?

Require Progress?

- 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 on the right side of the screen, and click **Add**.

User

Telemetry

Impersonate

Edit

Delete

Additional Details

Name

Test User

Active?

Yes

Email

testuseremail@serviceminder.com

Role

User

Service Agent

[Test User](#)

Timeclocks

Checklists

Organization Memberships

Login Activity

Page 1 of 1 (1 items)

Add...

Delete

| Date | Checklist | Created | |
|----------|----------------------------|------------------|--|
| 7/8/2024 | Test Maintenance Checklist | 7/8/2024 3:39 PM | |

You can also attach ad hoc checklists directly to a proposal by viewing the proposal details page and clicking the Checklist button in the dark blue tool bar at the bottom of the page.

Send

Email

Print

Add Deposit

Invoice

Add Task

Checklist

Bid

Copy

Open Issue

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

Add a Checklist

Activity*

Test Maintenance Checklist

User*

Joe Smith

Date

7/8/2024

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

Appointments

[Attach appointment...](#)

Checklists

Test Maintenance Checklist - Mon, Jul 8, 2024 at 3:47p

Example

Mon, Jul 8, 2024

[Delete](#)

Attachments

Attaching Checklists to Appointments and Proposal

Checklists are a great tool for any business - and having them accompany an appointment is an important tool for many businesses. Making sure certain tasks are accomplished during an appointment, whether it's an estimate, an

installation or a service, is key to customer satisfaction.

Kind*

Scope

ature?

gress?

✓ Daily (appointments)

After Clock In

After Last Appointment

Ad hoc

Daily (open)

To attach a checklist to an appointment:

- 1. Create your ad-hoc checklist.
- 2. Create your appointment and hit "Schedule" or "Schedule and Send."
- 3. Go to that saved appointment and select the "Checklists" tab in the details area to the right.
- 4. Add your desired checklist to the appointment and save.
- 5. 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

StartRe-QueuePrintEditCancelDelete

Additional Details

TT

Service Test Service

Scheduled Start Thursday, October 31 at 8:00a ☐ Confirmed

Scheduled Duration 1 hour

Quantity 1

Capacity Demand 0

Contact Brooke Trout

Phone (656) 565-6565

Email brooketrout@fakeemail.com

Lead Source Referral

MapNotes (0)PicturesVideosDocumentsAuditsFormsChecklists

Add...Delete...DateNameUserCompletedCreated

10/31/2024Ad Hoc Test10/31/2024 3:54p

To create a Proposal-Attached Checklist:

- 1. Create your ad-hoc checklist
- 2. Go to your proposal and click the "Checklist" icon at the bottom blue bar
- 3. Choose your checklist, user and date. Save it.
- 4. This checklist will appear as a "to do" for the chosen user on the chosen date.

Add Deposit

Invoice

Add Task

Checklist

Unbundle

Copy

Open Issue

Add a Checklist

Activity*

Ad Hoc Test

User*

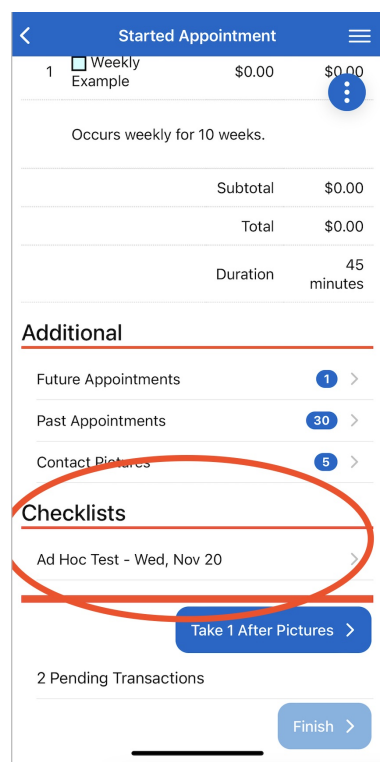
Example User

Date

10/31/2024

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).



Review Checklist Details

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

In the Snapshots section of the menu, you will see a tab for Checklists. Here 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 | Download |
|------------|----------------------------|-------------------------------|--------------------------------------|-----------|-----------|----------------|------------------------|-----|----------|
| 25 | | | | | | | Page 1 of 4 (78 items) | | |
| | | | | | | | Search... | | |
| Due | Checklist | For | Contact | User | Completed | Created | | | |
| 7/8/2024 | Test Maintenance Checklist | | | Test User | | 7/8/2024 3:39p | | | |
| 7/8/2024 | Test Maintenance Checklist | Residential Cleaning 7/2/2024 | Dodge Floofer - Rabbit Chasers 'R Us | Example | | 7/8/2024 3:47p | | | |

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.
