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 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:

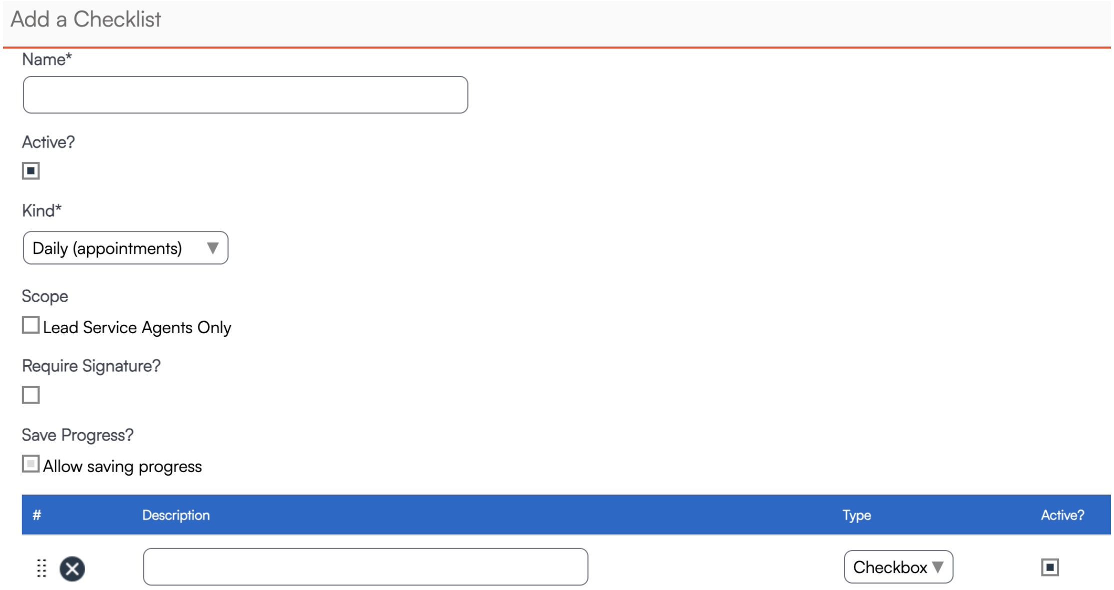
- Settings and Navigation
- Kinds of Checklists
- Assign a Checklist
- Attaching Checklists to Appointments and Proposals
- Review Checklist Details
- FAQs

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?**"

Settings and Navigation

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

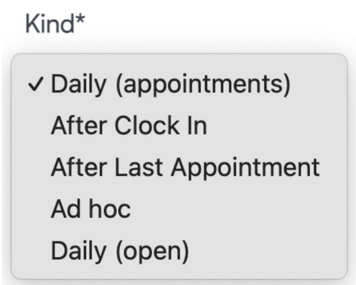


Configure the following settings on the checklist:

- **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:



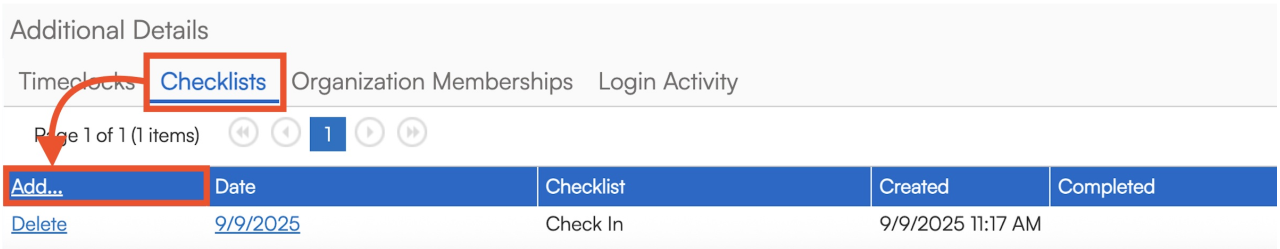
- **Daily (Appointments)** - This will create they check list for any service agent who has appointments on their schedule for that day
- **After Clock In** - "Pre Flight" type checklist. This check list will show to the service agent after they clock in for the day. Designed for "to do" list of items 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.

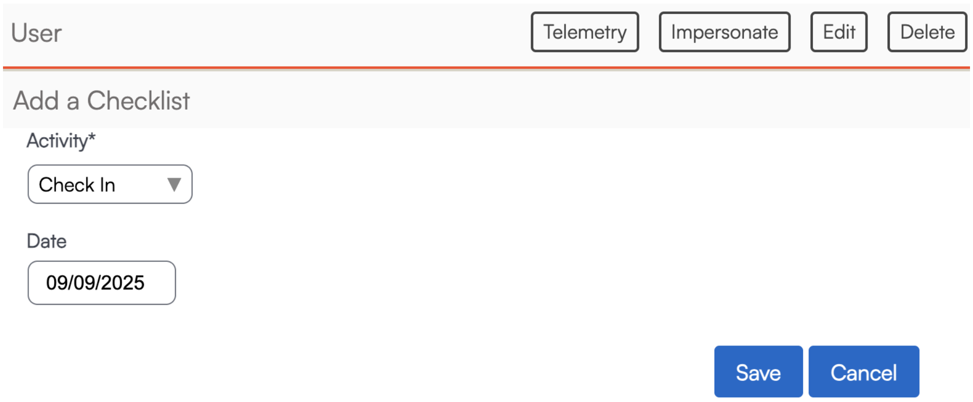
- **Daily (Open)** - This will create the check list for any service agent who logs in regardless of whether they have any appointments assigned for that date. The (open) label refers to this only creating the checklist if there is any defined availability for that day (i.e., M-F or M-S depending on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

Assign a Checklist

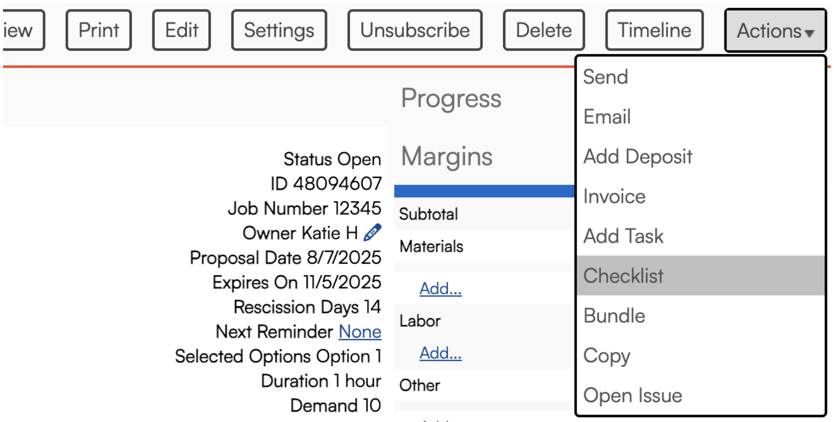
To manually assign an ad hoc checklist to a particular user, view their User details page in **Control Panel > Users.** Click on the **Checklist** tab in the **Additional Details** section at the bottom side of the page, and click **Add**.



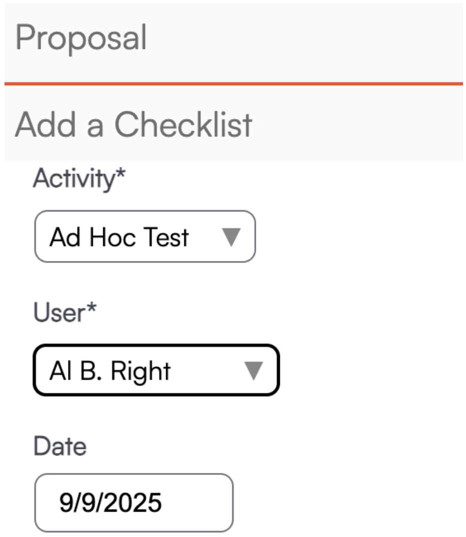
Checklist options will appear at the top of the page. Choose the checklist you want the user to complete and set an assignment date, then click Save.



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



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



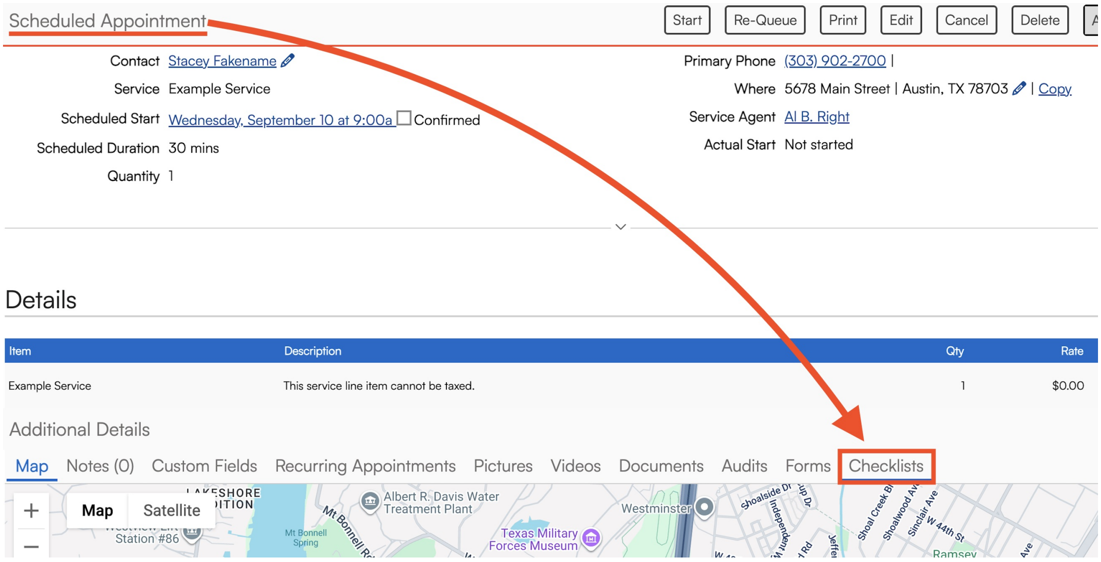
Click save. Then, you can review it towards the bottom of the page between Appointments and Attachments sections..

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.

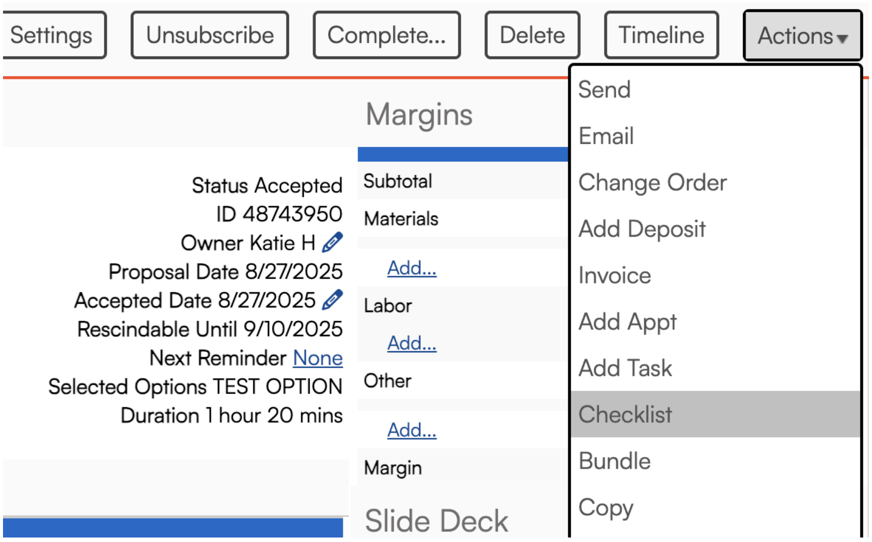
To attach a checklist to an appointment:

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.



To create a Proposal-Attached Checklist:

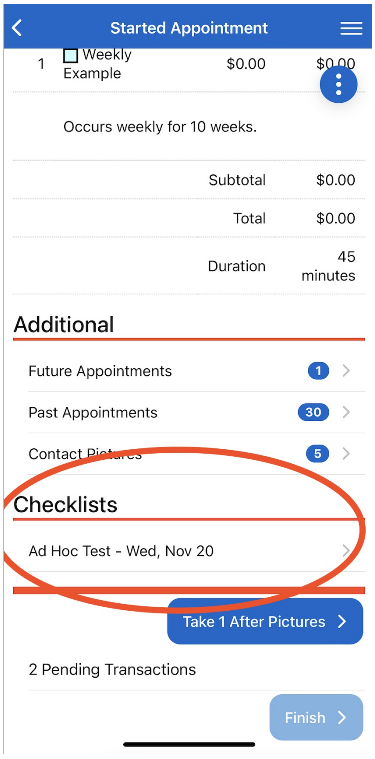
1. Go to your proposal and click **Actions > Checklist**
2. Choose your checklist, user and date. Save it.



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

Mobile App Checklists

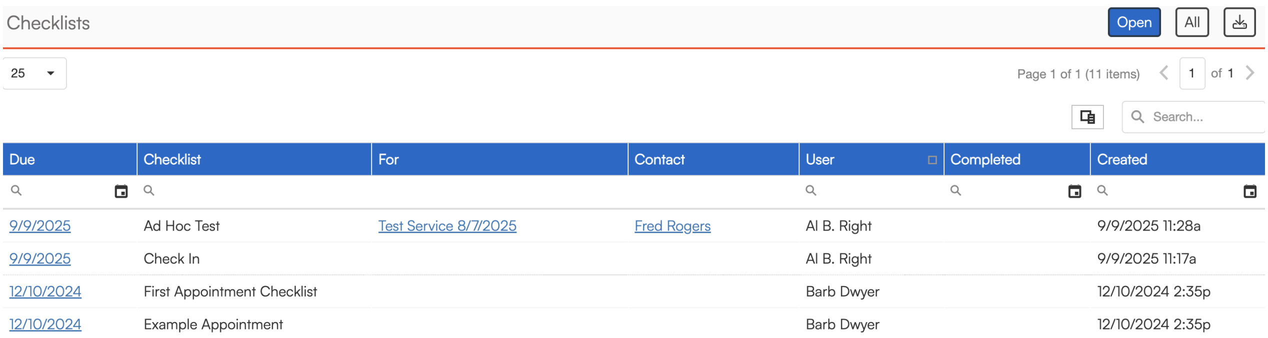
Here is an example of what it looks like when a checklist is attached to an appointment (on the web and the app).



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** 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.



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.