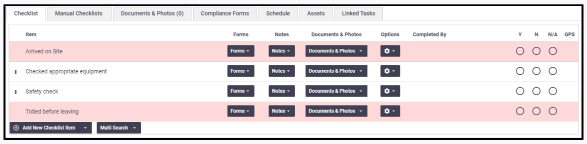
Checklist Templates

Checklists are a series of items that require a response (Yes, No, NA) which can be added to tasks or quotes.

A checklist could be a series of steps you want your field staff to follow in order to complete a specific task. For example:

- Arrived on Site
- Compliance Forms Completed
- Labour and Materials booked out
- Site left clean and tidy

Checklists can be added to any task or quote after it has been created (manually), or if it's a Checklist common to a Task Type, it can also be included automatically as soon as the task or quote is created.



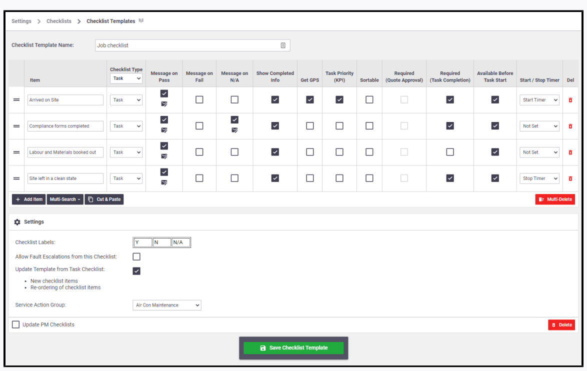
Create a checklist template

1. In **Site Admin**, go to **Settings**.
2. Use the search box to find **Checklists**.
3. Click the link in the relevant section, i.e. Quotes or Tasks.
4. Click **Create Checklist**.
5. Enter a name for the **Checklist**.
6. Click **Add Item**.

> You might want to use the **Cut & Paste** button if you already have checklist items listed somewhere else (such as a Word document). Simply copy text into the text box after clicking the button.

7. Enter the details of the checklist item.
8. Continue to add items to the checklist until all items are listed.
9. Once your checklist items are all entered, you can configure the settings for each checklist item (as explained below).
10. **Save**.

Checklist item settings



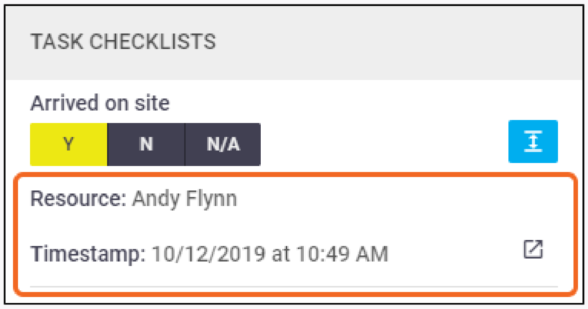
Setting	Description
Checklist Type	The checklist item will be shown on either the Quote, Task or both (Task & Quote) by setting the checklist type. This can be set against either individual checklist items or against the entire checklist using the field in the header.

On this page

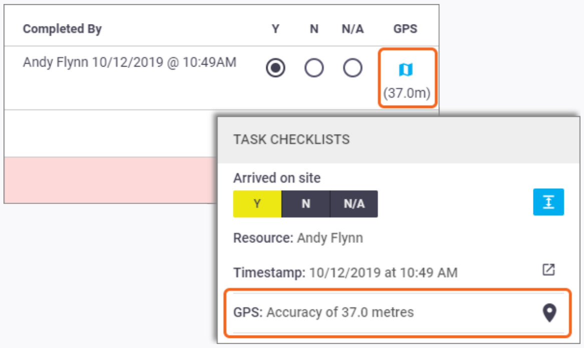
Videos -

Related articles

- Checklist Templates
- Checklists
- Using Task Checklists

Message on Pass **Message on Fail** **Message on N/A**	Tick this if you want an Email or SMS sent when the checklist item is marked as either Pass (Y), Fail (N) or N/A (Not applicable) After saving the checklist, a icon will appear allowing you to create an Email or SMS template to be used for notifications. Refer to Event Messages to learn more about these fields.
Show Completed Info	Enable this option if you want AroFlo Field to capture the date and time of when the checklist item is completed.  Field users can use the completed info on the checklist item as a quick link to the Labour timesheet page and the start time will be pre-populated using the completion time on the checklist item. This can be very useful for checklist items such as 'Arrived on Site' or 'Start Travel' where you want to capture and use completion info for populating a start time on a labour timesheet. It is not designed for populating the finish time on a labour timesheet.

<table>
<tr>
<td>Get GPS</td>
<td>
Enable this option if you want to record the GPS location when the checklist Item is marked as Pass / Fail or N/A.

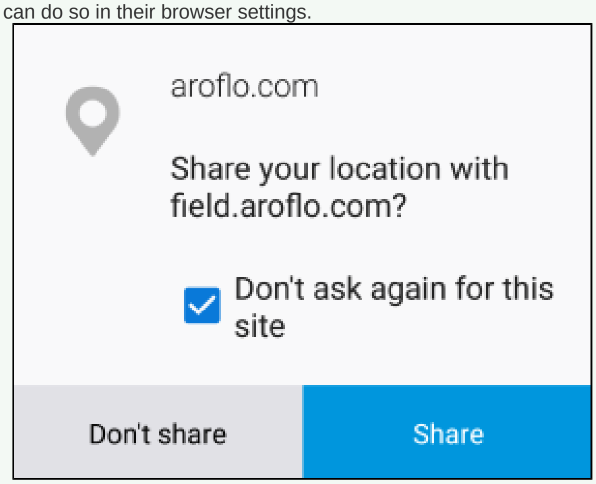


This can be useful if there is a dispute in the future, questioning where a user actually was at the time the checklist item was marked.
This is most useful for checklist items that represent work started or completed.

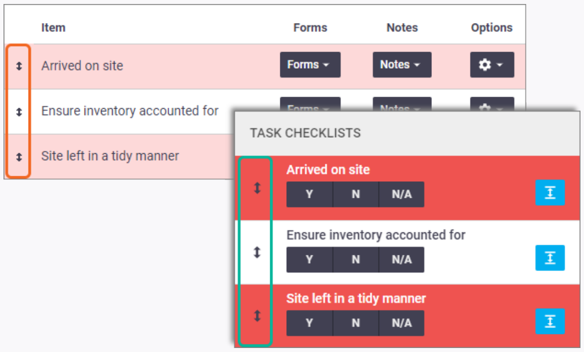
To ensure this function works, make sure the:

user card in Site Admin has Allow GPS Tracking enabled (see Feature Access tab)
user's mobile phone has GPS functions enabled, location sharing enabled for the web browser, and is in range of a GPS signal (e.g. not in an underground carpark).

Users will be asked the first time they log into AroFlo Field whether they want to enable location sharing. If they choose 'Don't share', and later want to enable location sharing, they can do so in their browser settings.

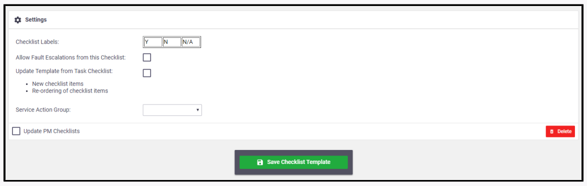


</td>
</tr>
<tr>
<td>Task Priority (KPI)</td>
<td>
Enable this option if the checklist item would fulfil a Task Priority Response when marked as Pass / Fail or N/A.
Please see Site Admin - Priority for more information on tracking tasks via Priority Response.
</td>
</tr>
</table>

Sortable	Enable this option if the checklist item should be sortable in Office and Field. Users simply click and drag the sort icon as required. 
Required **(Quote Approval)**	Enable this option if the checklist item needs to have a Pass / Fail or N/A marked before a Quote can have status of Approved.
Required **(Task Completion)**	Enable this option if the checklist item needs to have a Pass / Fail or N/A marked before a Task can have status of Completed.
Available Before Task Start	Used in conjunction with linked compliance forms, enable this option to make the checklist item available to users regardless of any pre-start compliance forms set for the job. For example, you may want your field techs to mark off when they 'Arrive on Site' before they complete the required compliance forms linked to the job.
Start / Stop Timer	To have a checklist item automatically start or stop the labour timer on either a quote, task or periodic task, select **Start Timer** or **Stop Timer**, as required. Leave the default 'Not Set' option in place if you don't want to use this feature. When a user sets a checklist item with the **Start Timer** option on it to **Y** and saves, the timer starts. When they set a checklist item with the **Stop Timer** option on it to **Y**, they will be asked to stop the timer and create a timesheet entry.
Del (Delete)	Click to delete the checklist item.

Checklist settings

The following checklist settings apply to the entire checklist (optional settings for advanced checklist requirements).



<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Checklist Labels</td><td>You can relabel the Checklist items representing Pass, Fail and N/A by clicking into the field and changing the values from their default: Y / N / N/A.</td></tr>
<tr><td>Fault Escalations</td><td>The option Allow Fault Escalations from a Checklist presents the field technician with two options when a Checklist item has failed ("N"):

Escalate Fault: allows you to create a new task that uses checklist items description as the Task Identification.

This feature can be especially useful when used with Message on Fail. Combining the setting allows Admin users to be notified of a fail and further users to action.
Leave a Note: allows you to leave a small text note that is linked to the checklist item.

The two options will be displayed in Office and Field.

Failed items are shown in the Failed Inspection Summary Report avai lable when logged in as an office user from Reports > Tasks > Failed Inspection Summary.</td></tr>
<tr><td>Update Template from Task Checklist</td><td>This allows new adhoc checklist Items to be added through a Task which will also update this checklist template.

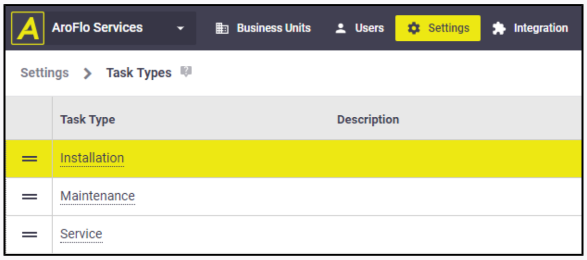
This is more likely used on periodic maintenance jobs and rarely used on "standard" day-to-day jobs.</td></tr>
<tr><td>Update PM Checklists</td><td>Tick this option to choose what you want to happen with existing Periodic Maintenance checklists:
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Add new checklist items to existing periodic task checklist</td><td>Adds newly-created checklist items to existing Periodic Checklist items.</td></tr>
<tr><td>Update text and settings for periodic task checklist items</td><td>Updates text changes and settings to existi ng Periodic Checklist items.</td></tr>
<tr><td>Delete from existing periodic task checklist any items deleted from this template</td><td>Removes checklist items from Periodic Checklists that have been removed from the checklist template.</td></tr>
</table></td></tr>
<tr><td>Service Action Group</td><td>You can link a single Service Action Group to the checklist. This allows the office or field staff to select a Service Action that can automatically link Documents, Forms and/or Inventory to a task.

This option will only be visible if Service Action Groups have been created.</td></tr>
</table>

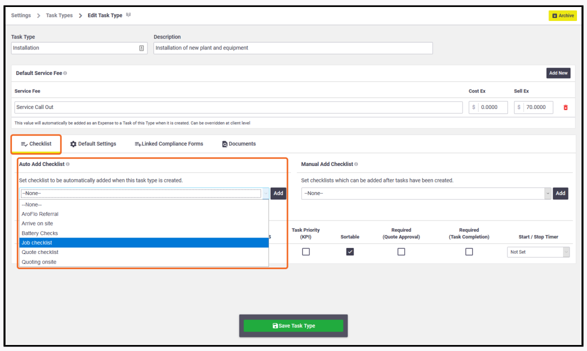
Link a checklist to a task type

To be able to use a checklist, you must link it to a task type. You can set it up so that whenever you create a task or quote with your chosen task type, the checklists you've linked to that task type will appear by default on the Checklist tab of your task or quote. To do this:

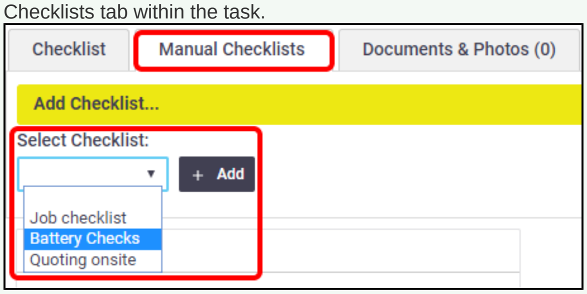
1. In Site Admin, click **Settings > Tasks > Task Types.**
2. Click the task type you want to link the checklist to.



3. On the **Checklist** tab, under **Auto Add Checklist**, click the dropdown menu and select the checklist you want to add to the task type you've chosen.



4. Click **Add**. You can repeat the above steps as many times as you need to, if you need to add multiple checklists to a task type.

> You can use the **Manual Add Checklist** dropdown in the same way. This allows you to manually select a checklist to add to a particular task via the Manual Checklists tab within the task.
>
> 
>

5. When you've added all the checklists you need to, click **Save Task Type**.

For more information on using checklists, refer to Using Task Checklists.