

Using Generated Checklists

[Control Panel](#) > [Work Order](#) > [Property Inspection Checklists](#)

Using Generated Checklists:

1. After a Checklist Template has been created and a Checklist has been generated, it is ready to be used. Refer to [Adding Checklists](#) for more information.
2. Click **Control Panel** > **Work Order** > **Property Inspection Checklists**.
3. Under the **Open Checklist** section, locate the desired checklist and click **Update**.
4. Based on the checklist format, skip to **Simple Checklist** or **Good/Fair/Poor Rating** below.

Note:

- If you are having issues with the checklist working, make sure you have added two levels to the Checklist Contents.

Cancel | Complete

Description	Date Generated	Last Modified Date	Last Modified By	
What needs	6/7/2011	6/7/2011	Tony Long	Update
Curb Appeal	6/7/2011	6/7/2011	Tony Long	Update

5. A **Simple** checklist will display as such.

Table Of Content
Lobby
Hallways

	RATING	REMARKS	FOLLOW UP	DATE RESOLVED
Lobby				
Windows	<input checked="" type="checkbox"/>	Cracked window behind receptionist's desk	<input checked="" type="checkbox"/>	
Floors	<input type="checkbox"/>		<input type="checkbox"/>	
Hallways				
Walls	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Carpet	<input type="checkbox"/>		<input type="checkbox"/>	

* Required Information

Save & Complete Save Close

6. A **Good/Fair/Poor Rating** checklist will display as such.

Table Of Content
Hallways
Bathrooms
Lobby

	RATING	REMARKS	FOLLOW UP	DATE RESOLVED
Hallways				
Carpet	<input type="radio"/> Good <input type="radio"/> Fair <input checked="" type="radio"/> Poor	Stains throughout.	<input checked="" type="checkbox"/>	
Walls	<input type="radio"/> Good <input checked="" type="radio"/> Fair <input type="radio"/> Poor		<input type="checkbox"/>	
Bathrooms				
Floors	<input checked="" type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor		<input type="checkbox"/>	
Fixtures	<input checked="" type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor		<input type="checkbox"/>	
Mirrors	<input checked="" type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor		<input type="checkbox"/>	
Stalls	<input type="radio"/> Good <input checked="" type="radio"/> Fair <input type="radio"/> Poor		<input type="checkbox"/>	

* Required Information

Save & Complete Save Close

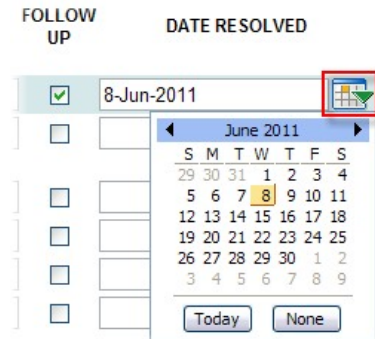
7. If your checklist contains a lot of content, select the desired section from the **Table of**

Contents to jump directly to it.

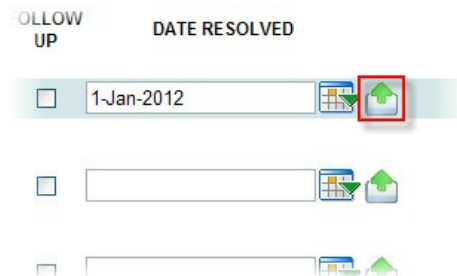
- Based on the Description and Type of your checklist, place **Checkmarks** and/or **Remarks** next to applicable sections.
- If you wish to flag a specific item to follow up on, select the desired item(s) for **Follow Up** with a checkmark.

Note:

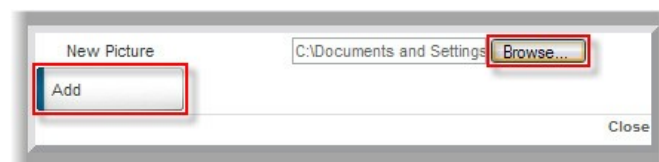
- An item marked for Follow up will be highlighted in yellow for easy reference.
- By flagging an item for Follow Up, you must return to the checklist and enter a **Date Resolved** before the checklist can be completed.



- Images can be uploaded to checklist items to compliment documented issues. Click on the **Upload Image** icon next to the calendar icon.



- In the pop-up window click **Browse** and select the image file from your computer or local network. Once completed click **Add**.



Note:

- Numerous images can be uploaded to document the process of a resolution.
- A number in parenthesis will display next to the image upload icon to signify that images have been uploaded for that checklist item.
- Uploaded images can be viewed anytime when using a generated checklist or from the Checklist History section.

- Click **Save & Complete** to save changes and close out the checklist. Clicking **Save & Complete** will add the checklist to the [Checklist History](#).
- Click **Save** to save changes, or click **Save & Complete** to save changes and close out the

checklist. Clicking **Save & Complete** will add the checklist to the [Checklist History](#).