





## 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	<a href="#">Update</a>
Curb Appeal	6/7/2011	6/7/2011	Tony Long	<a href="#">Update</a>

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.

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

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**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.
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FOLLOW UP      DATE RESOLVED

☒ 8-Jun-2011

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Calendar pop-up: June 2011

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Buttons: Today, None

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

FOLLOW UP      DATE RESOLVED

☐ 1-Jan-2012

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

New Picture

C:\Documents and Settings

Buttons: Add, Browse...

Close

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**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.
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12. Click **Save & Complete** to save changes and close out the checklist. Clicking **Save & Complete** will add the checklist to the [Checklist History](#).
13. 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](#).