Adding Checklists

Control Panel > Work Order > Property Inspection Checklists

Adding Checklists:

There are two main steps to creating a Checklist: **1. Create a Checklist Template** and **2. Generate Checklist**. See <u>About Property Inspection Checklists</u> for more information. *Creating a Checklist Template* involves adding content into two levels: **Level One - Categories** and **Level Two - Checklist Items**. See **Step #4** below for a further explanation.

Note:

- Multiple checklists may be generated from a Checklist Template now or at a future date, if necessary.
- If you wish to create another checklist from an existing Template, skip to Step #6.
- 1. Click Control Panel > Work Order > Property Inspection Checklists.

Work Order -	Setup -	My
Property Inspe	ction Check	lists
Dashboard		
Messages		
Tenant Reques	sts	•
Preventive Mai	ntenance	٠
Visitor Security	t.	•
COI		
Surveys		•
Property Inspe	ctions	•
Search		•

2. Click Add under the Checklist Template section.

Property Chec	klists				View Checklin	st History
Checklists					Add	Remove
Title	Location	Description			Sec. 1	e
Property Checklist	Property Checklist	Hello			Gener	erate
Interior Cleanliness	Hallways/ Bathrooms	Has maintenance been keepi	ng up with sche	dule.	Gener	arate Edit
Building Exterior	Outside	Curb Appeal			Gener	arate Edit
Spring Cleaning	Everywhere	What needs to be repaired?			Gener	erate Edit
Open Checklists					Cancel C	Complete
Title	Location	Description	Date Generated	Last Modifi Date	ed Last Modifie	đ
Spring Cleaning	Everywhere	What needs to be repaired?	6/7/2011	6/7/2011	Tony Long	Update
Building Exterior	Outside	Curb Appeal	6/7/2011	6/7/2011	Tony Long	Update

- 3. Enter the Checklist Attributes:
 - Title
 - Location (e.g. Building Interior, Parking Garage, Building Exterior, etc.)
 - Description
 - Monthly Tickler Notification (optional): Will email a notification to all Non-Tenant

users with the Checklist Notification email subscription enabled in their user profiles.

• Checklist Type: Simple (checkboxes) or Good/Fair/Poor Rating

Title *	Interior Cleanliness
Location *	Hallways/ Bathrooms/ Lobby/ etc.
Description *	Has maintenance been keeping up with schedule.
Monthly Tickler Notification:	
	O Every 1 💌 day of the month
	 First V Tuesday V of the month

- 4. Add Checklist Contents.
 - Click Add under the Unapplied Contents section.

 TOC Hallways Carpet Walls Bathrooms Floors Eivtures
Mirrors Lobby Carpet Chairs Plants

- Enter the Name of the new content.
- Click Add Content.



• The new content will be added to the **Unapplied Contents** section. Select the newly created/ desired content(s), and **click and drag** to the appropriate section of the **Checklist Contents** section.

stalls	4 TOC
	Hallways
Stalls	Carpet
AT CHALLS	Walls
Ustans Leca	A Bathrooms
	Floors Stalls
	Mirrors
	Stalls
	Lobby
	Carpet
	Chairs

Submit	Cancel

Note:

- Two levels, as seen above, must be added to the Checklist Contents for a generated checklist to work. Level One is the Category, and Level Two is the Checklist Item.
- 5. Click **Submit** once finished. The newly created Checklist criteria will be displayed as a new *Checklist Template*.
- 6. To create a functional checklist, locate the desired Checklist Template, and click Generate.

Property Ch	ecklists	View	Checklist History
Checklists			Add Remove
Title	Location	Description	
Interior Cleanliness	Hallways/ Bathrooms/ Lobby/ etc.	Has maintenance schedule.	Genearate Edit
Building Exterior	Outside	Curb Appeal	Genearate Edit
Spring Cleaning	Everywhere	What needs to be repaired?	Genearate Edit

 The newly generated checklist will display under the Open/ Generated Checklists section. Refer to Using Generated Checklists for more information.

Checklists					Add R	emov
Title	Location	Description				
Interior Cleanline	ss Hallways	Has maintenano	e been		Genearate	E
Building Exterior	Outside	Curb Appeal	1		Genearate	E
Spring Cleaning	Everywhen	e What needs to be	e repaired?		Genearate	E
Open Checklists	Everywher	e What needs to be	e repaired?		Genearate Cancel Co	mple
Open Checklists	Everywher	e What needs to be Description	Date Generated	Last Modified Date	Cancel Co Last Modified By	mple
Spring Cleaning Open Checklists Title Spring Cleaning	Everywhere Location Everywhere	What needs to be <u>Description</u> What needs repair?	Date Generated 2 6/7/2011	Last Modified Date 6/7/2011	Genearate Cancel Co Last Modified By Tony Long	mple

 1.
 Checklist Templates

 2.
 Generated Checklists