Setting Up a Checklist for a Task

To Create a new check list, click the drop down arrow under task info, then click maintain checklists. (Shown Below)



Below is a look at the check list maintence screen. As you can see there are a few things we need to type in to create our first checklist.

To Create a new check list start typing a name for the check list in the Check List Name Field as shown below.



Fill out the remaing fields as shown below.

2 3 9 · 101						The Service Pargram					
File	Home Cr Route Rou Schedule Info Routes	eate Extended de Invoice a Entry	Open Invoices Open Invoices Closed Invoices Miscellaneous * Secure	the tools The to	Service Program	Mise Mise	Contract List	ftem Info -	Update QuickBooks	Misc Sync Mobile Devices	Task Task Entry Info
Taski Check	ist Name	ge Check List (Lists	Sort A Chec	k List item	B		Check List An:	er Swer	(nint 🐝 Be	eset 🌮 <u>C</u> lose	
Checklist1 Checklist1 Checklist1			1 Is the 2 Whas 0	Is there any visible leaks? Whas the filter changed on last sen 0			Yes:No: Yes:No:				

A). The Sort field is to define what order the questions will appear in the checklist

B). Check list item is the question or item description.

C). The check list answer field is used to define the possible answers to the check list item.