

# Gold Service

## Managers Checklist Instruction Manual

**Version 0.1**  
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## Overview

The Checklist feature allows you to add Checklists to jobs which the engineer can complete in the App. This is a Gold Service 2.0 feature.

### What are Checklists used for?

The Portal provides a blank Checklist template which allows you to create bespoke templates. Checklists can be used for multiple purposes such as:

- Risk Assessments
- Health and Safety checks
- Machine service checks
- General 'To Do' lists

### How do Checklists work?

In the Portal, you will see a feature called 'Checklists'. Using this feature, managers can create and store their Checklists and assign them to invoice types or individual jobs so that they will be visible in the App for the engineer to complete. Checklists can be configured to be mandatory or non-mandatory, and you can choose when the engineer should complete it:

- Start of job
- During job
- End of job

When the engineer updates the Checklist in the App, the information will be visible in the Portal.

### What does this document contain?

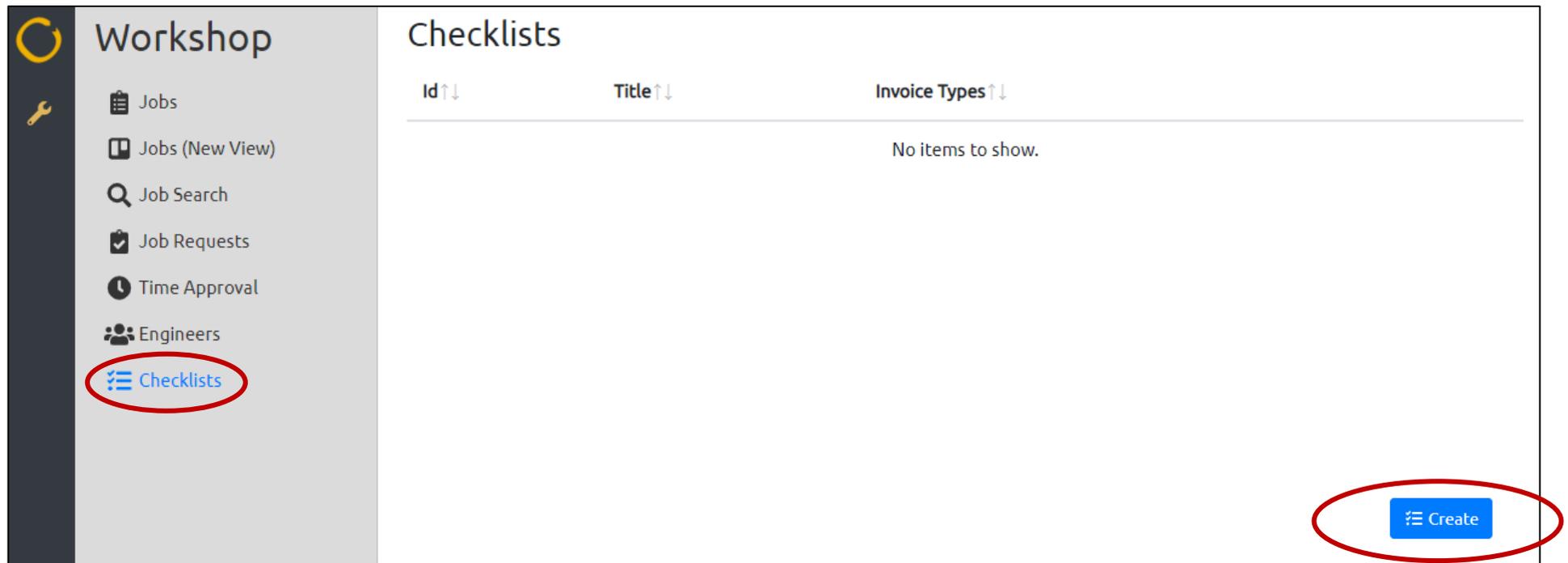
This document is intended to be used as a training manual for all users of the Checklist functionality. It contains screen shots and process instructions for all parts of the App and Portal. There is a separate, bitesize training manual for the App for the Engineers.

# Creating Checklists in the Portal

## The Checklist Library

In the Portal you will see a new page on the left-hand side of the screen called 'Checklists'. If you click on this, it will take you to the 'Checklist Library' screen. Here is where you can create and store your Checklists. The more you create, the more you will build up your library.

To create a Checklist, click on the 'Create Checklist' button found at the bottom right-hand side of the screen.



### Did you know?

The most recently created Checklist will automatically sit at the top of the list, but you can use the 'ascend / descend' to change this.

## Creating a Checklist

When you have pressed the 'Create Checklist' button on the Checklist library page, you will be taken to a new screen. From here, you can:

- **Name your Checklist:** You can create the title of your Checklist to reference what it is used for
- **Build up your Checklist items:** Add questions or tasks which your engineer can complete in the App
- **Configure your Checklist:** Make it mandatory / non-mandatory, and specify when the engineer should complete the Checklist on the job
- **Add Checklist to an invoice type:** Add the Checklist to one or more invoice types so it automatically appears against any job with that invoice type

**Workshop**

- Jobs
- Jobs (New View)
- Job Search
- Job Requests
- Time Approval
- Engineers
- Checklists

### Checklist -

No current checklist items

**+** Add checklist item

**Title**

**Mandatory**

**Completion Stage**

**Invoice Types**

Type	Description
No invoice types selected	

← Back

☰ Save

## Configuring your Checklist

Once you have added your Checklist items, you can configure it via the right-hand side of the screen to ensure it is suitable for purpose.

- **Title:** To change this, click into the box and add your title. This title will be displayed in the Checklist library so you can identify it easily.
- **Mandatory or Non-Mandatory:** To make the Checklist completion mandatory, tick the tick box. The default will be set to non-mandatory.
- **Completion Stage:** You can choose whether the engineer completes the Checklist at the start of the job, during the job or at the end of the job. The default will be set to the end of the job. Use the drop-down box to choose your selection.
- **Invoice type:** You can add the Checklist to an invoice type, so it automatically appears on any job created using that invoice type. If you know the invoice type number, type it into the box and press enter. If you don't, click on the search icon to open the search box. Search for the invoice type and press 'OK'. You can add multiple invoice types to the Checklist if necessary and all invoice types assigned to this Checklist will be visible at the bottom right-hand side of the screen under the 'Type and Description' section.

### Configuration Area

### Invoice Type Search Function



#### Did you know?

Even if Checklists are set for mandatory completion at the start of a job, engineers can choose to skip them until later to allow them to continue with the job. The Checklists will appear everytime the engineer starts to record time on that job, until it has been completed.

## Adding a new question or task to your Checklist

To add a new question or task to the Checklist, press '+Add Checklist item'.

Workshop

Checklist - New checklist

No current checklist items

+ Add checklist item

Title

New checklist

Mandatory

A text box will appear allowing you to enter the question or task.

Workshop

Checklist - New checklist

Enter your text here and press the blue 'Add checklist item' button.

Add checklist item

Title

New checklist

Mandatory

Completion Stage

End of job

Once you have entered the text, press the blue 'Add Checklist item'. Your item has now been added to the Checklist.

Workshop

Checklist - New checklist

"Enter your text here and press the blue 'Add checklist item' button."

Add checklist item

Title

New checklist

Mandatory

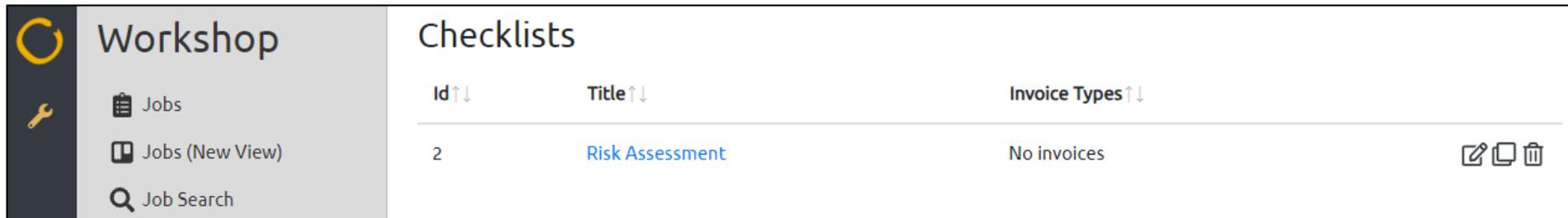


### Did you know?

You can edit the Checklist item by double clicking on it. This will reopen the text box and allow you to amend it. Ensure you press the save button to save these amendments. You can also delete the item by pressing the  icon next to it.

## Editing, duplicating and deleting Checklists

Once you have created your Checklist, you will see that it now exists within the 'Checklist Library' page of the Portal. You have the option to edit, duplicate or delete the Checklist from this page. Next to each Checklist, you will notice 3 symbols. One to edit  one to duplicate  and one to delete 



### Editing your Checklist

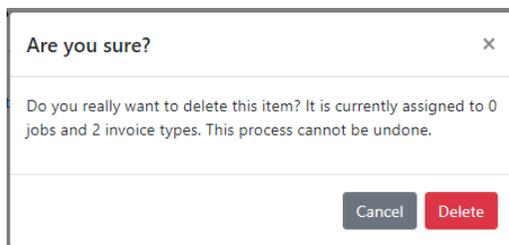
To edit your Checklist, click on the edit symbol, or the Checklist title. This will open the Checklist and allow you to make the necessary amendments. Once you are happy with the amendments, remember to click the 'save' button at the bottom right hand corner of the screen. If you do not do this, your changes will not be saved.

### Duplicating your Checklist

To duplicate your Checklist, click on the duplicate symbol. This will open a duplicate version of that Checklist. You will notice that the title of the Checklist will be the same but will have 'copy' at the end of it. You can only save this duplicated Checklist if something has been changed on it – for example: the title, or a question or task. Remember to click the 'save' button at the bottom right hand corner of the screen to save the Checklist. If you do not do this, your changes will not be saved.

### Deleting your Checklist

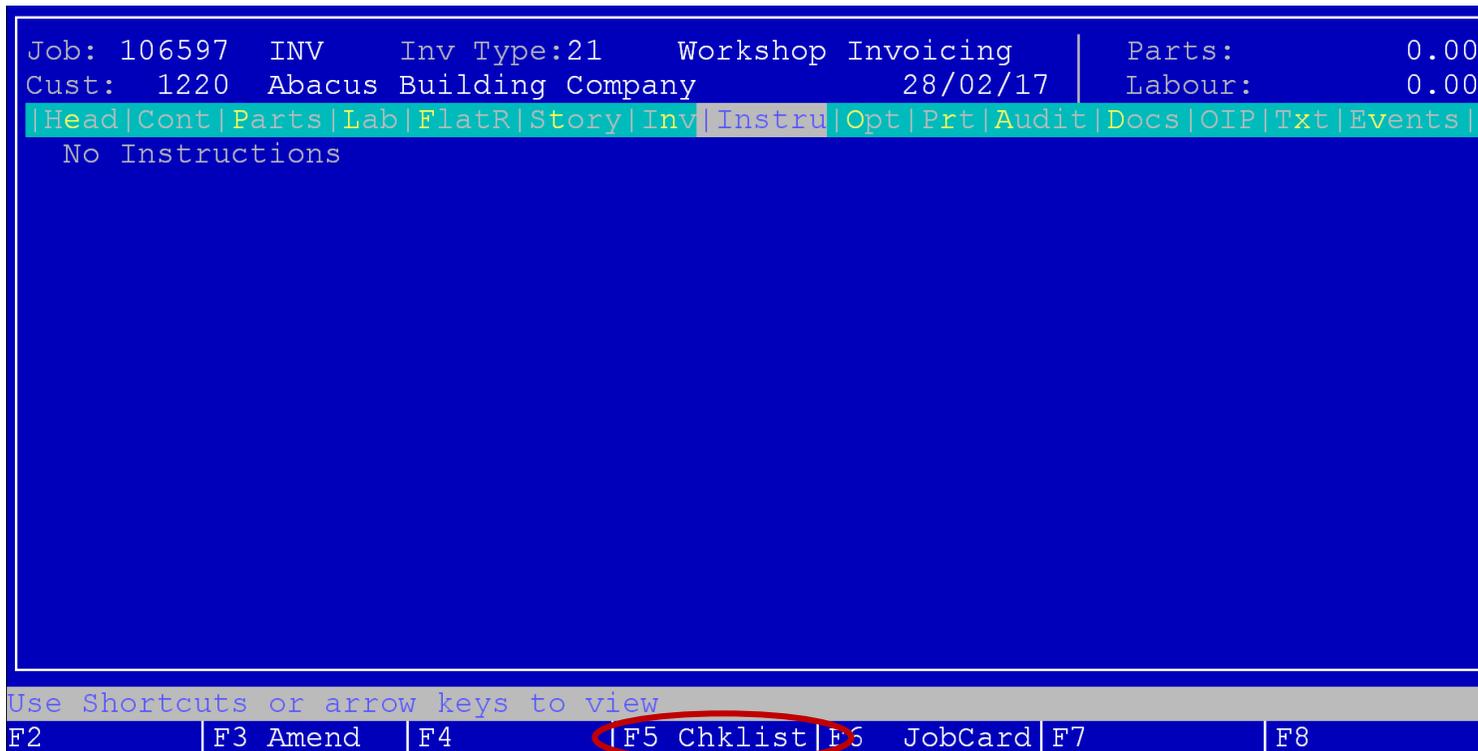
To delete your Checklist, click on the delete symbol. A pop-up box will appear asking if you're sure you want to delete it. It will tell you how many jobs and invoice types the Checklist is assigned to. Deleting it will only remove it from jobs and invoice types going forward and not retrospectively.



# Overview of the Checklists in Gold

## Assigning a Checklist to a job in Gold

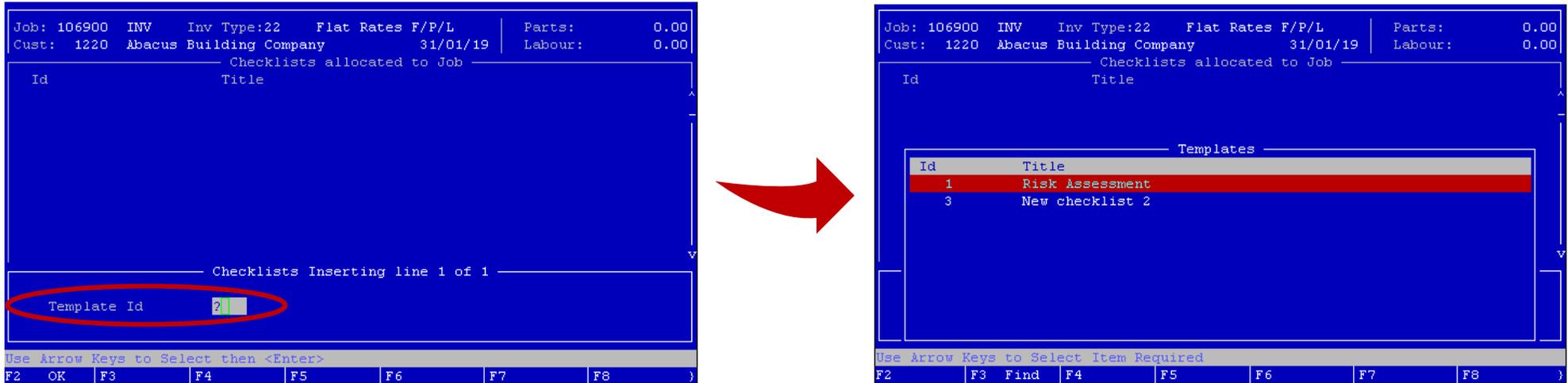
If you are creating a job with an invoice type that does not have Checklists assigned to it, then you can assign Checklists to the job in the 'Instructions' tab. You will see a new item called 'Chklist'. Click on this to assign a Checklist to the job.



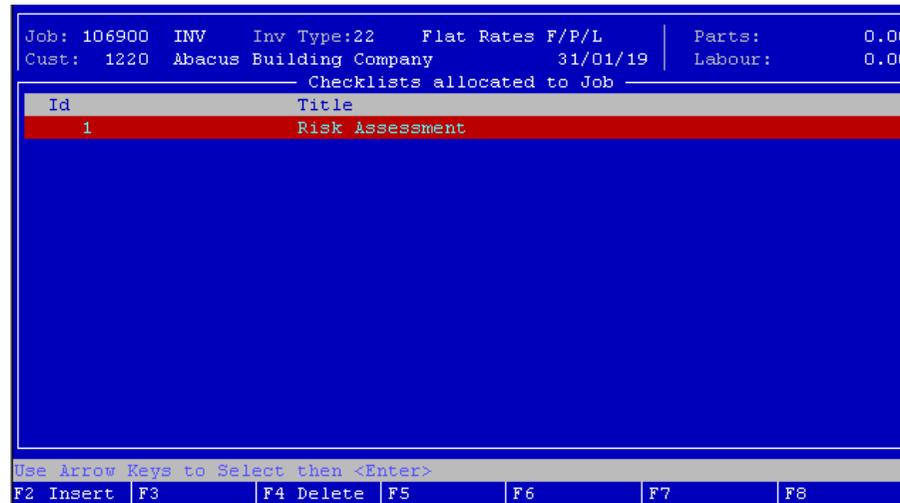
**Did you know?**

Checklists can be accessed via both Workshop Entry Jobs and Jobs created via Scheduler.

Once you have selected the Checklist option, select 'insert'. In the 'Template ID' section, you can enter the template ID and press enter. If you don't know the Template ID, put a question mark in the box and press enter. This will bring up all the Checklist templates that are available.



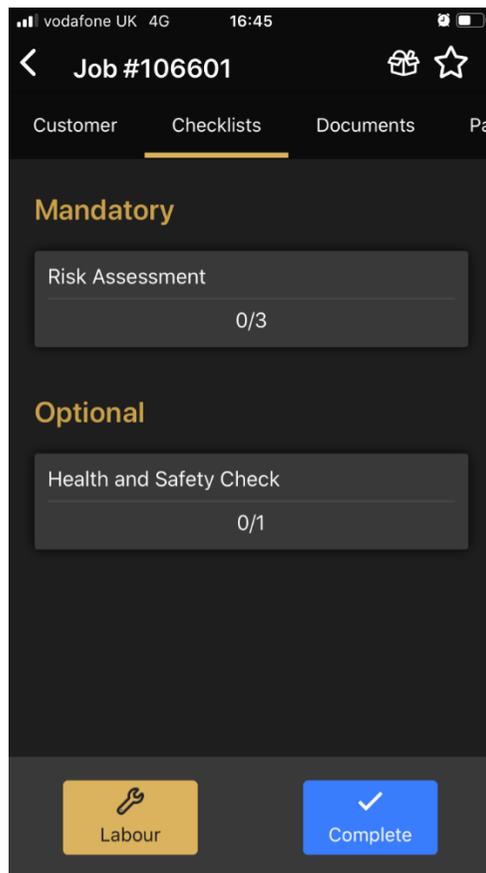
Select the Checklist you want to add to the job, and press enter. If you want to add more than one Checklist, follow the process again. You will see that your Checklist is now added to the job.



# Overview of the Checklists in the App

## The Checklist Tab

When engineers now open the job in the App, they will see a new tab called 'Checklists'. This is where the engineer can see all Checklists that have been assigned to that job. It will be split into 2 sections: Mandatory and Optional



### Mandatory

This section will hold all Checklists which have been configured as mandatory completion within the Portal.



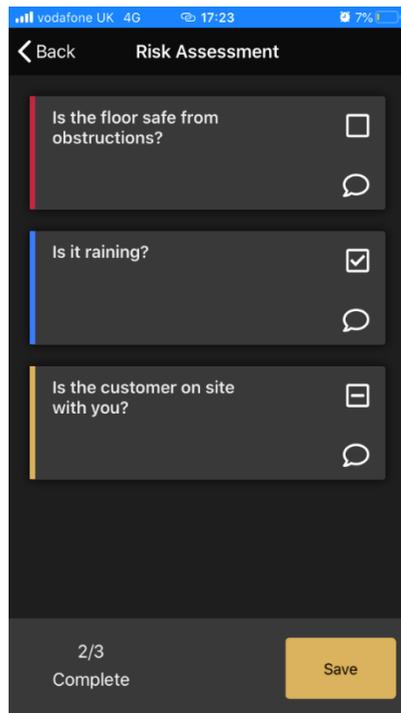
### Optional

This section will hold all Checklists which have been configured as non-mandatory completion within the Portal.

## How to show the Checklist item has been actioned

When engineers click on the Checklist, it will open it in a new screen and display all the questions / tasks within it. Next to each item you will see a 'tick box' icon, and a 'speech bubble' icon. This page focusses on the 'tick box' icon.

The engineer can use the tick box to show that an action has been taken against that specific Checklist item. To use it, press anywhere on the Checklist item. Pressing more than once will change the status of the item:



### No action taken:

If the engineer has not pressed on the Checklist item, the tick box will be empty, and the colour bar will be red. This indicates the engineer has not completed that item yet.

### Press once:

If the engineer presses on the Checklist item once, a tick will appear in the tick box, and the colour bar will turn blue. This indicates that the engineer has completed this item.

### Press twice:

If the engineer presses on the Checklist item twice, a line will appear in the tick box, and the colour bar will turn gold. This indicates that this item is 'not applicable'.

The numbers at the bottom of the screen indicate the number of Checklist items that have been actioned.

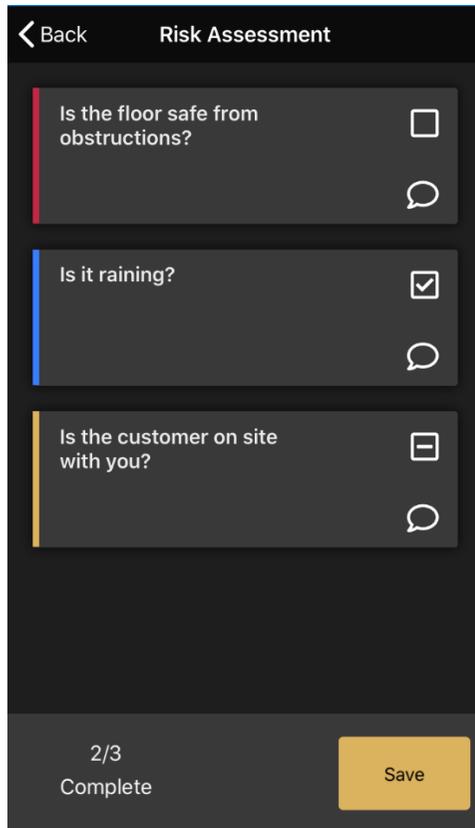


### Did you know?

You can press the Checklist item for a third time to reset it to its original state of 'no action taken'.

## How to add a comment to a Checklist item

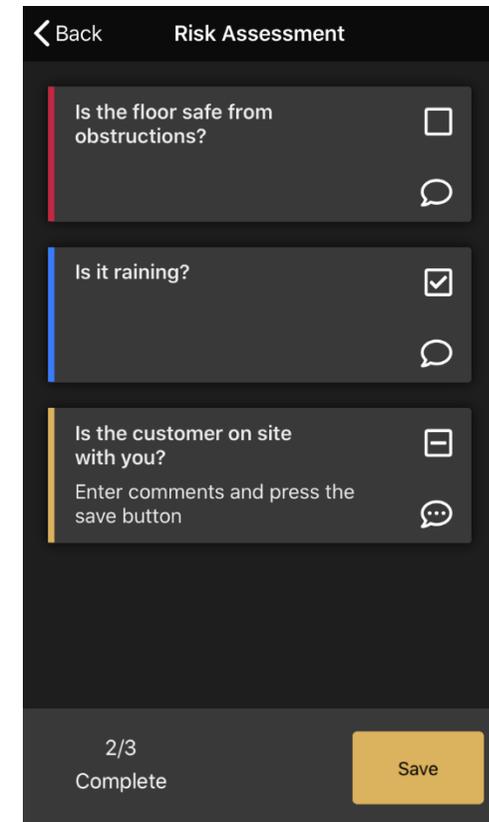
Engineers can add comments to Checklist items which will be sent back to the Portal as soon as they are saved.



To add a comment, press the speech bubble icon next to the relevant Checklist item. This will open a new page



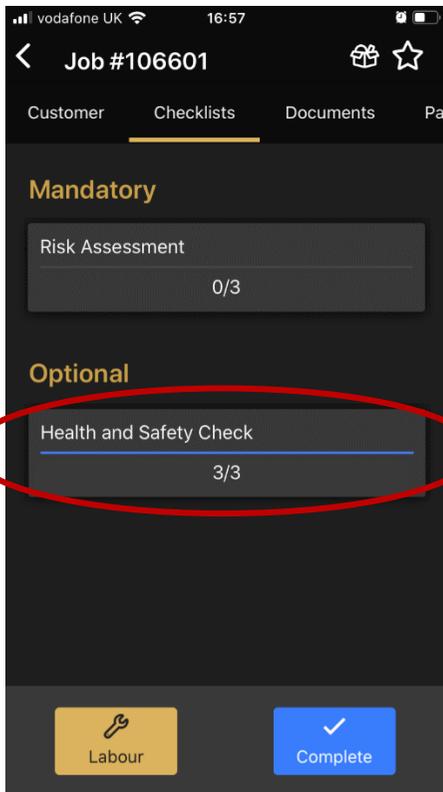
When the comments have been entered, press the 'save' button to save the text, or the 'delete' button to remove the text



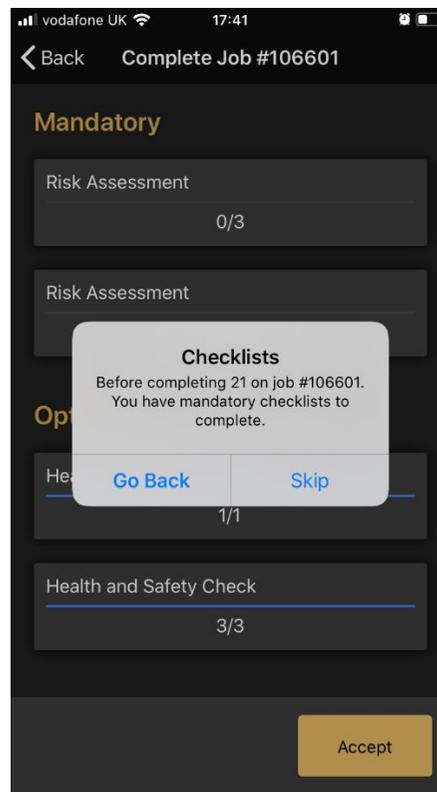
You will see that the speech bubble icon now has 3 dots through the middle and the comments entered are shown

## Completing Checklists on the App

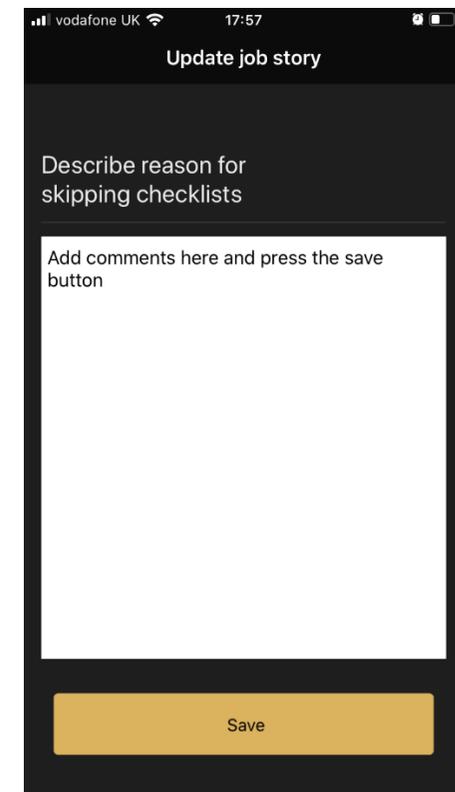
When an engineer has completed the Checklist on the App, the status of the Checklist will change to show it has been completed.



When the engineer has completed a Checklist, it will show on the Checklist tab with a solid line through it, and the 'total' will reflect that all items have been done. The engineer can go into completed Checklists and amend them if necessary



If the engineer tries to complete the job with mandatory Checklists outstanding, they will be prompted to complete the items. If they press the 'accept' button from this page, a notification asks if they want to 'go back' to the Checklists, or 'skip' to complete the job



If the engineer chooses to 'skip' the Checklist, they will be asked to add a reason for the decision. Once they enter their comments and press the 'save' button, they will be taken through the usual job completion flow

# Overview of completed Checklists

## Reviewing the completed Checklists in the Portal

Managers can review the Checklist information from within the job in the Portal. You will see a new Checklist tab, and within it you can see all the Checklists assigned to that job. This screen will tell you:

- If the Checklist is mandatory or non-mandatory
- Whether it should be completed at the start of the job, during the job or at the end of the job
- When the Checklist was last updated by the engineer and the status of its completion

The screenshot displays the 'Checklists' tab for Job 106601. At the top, job details are shown: Invoice Type (21 - Workshop Invoicing), Status (Logged), Customer (1220 - Abacus Building Company), Sub-Status (Logged), and Date (30/06/2020). Below this, a navigation bar includes tabs for Job, Customer, Wholegood, Parts, Labour, Documents, Audit, and Checklists. The main table lists the following checklists:

Title	Mandatory	Completion stage	Last Updated	Progress
Health and Safety Check		End of Job	30/06/2020 05:41pm	3/3
Risk Assessment	✓	During Job	Never	

At the bottom of the screen, there are buttons for '< Back' and 'Job Confirmation'.



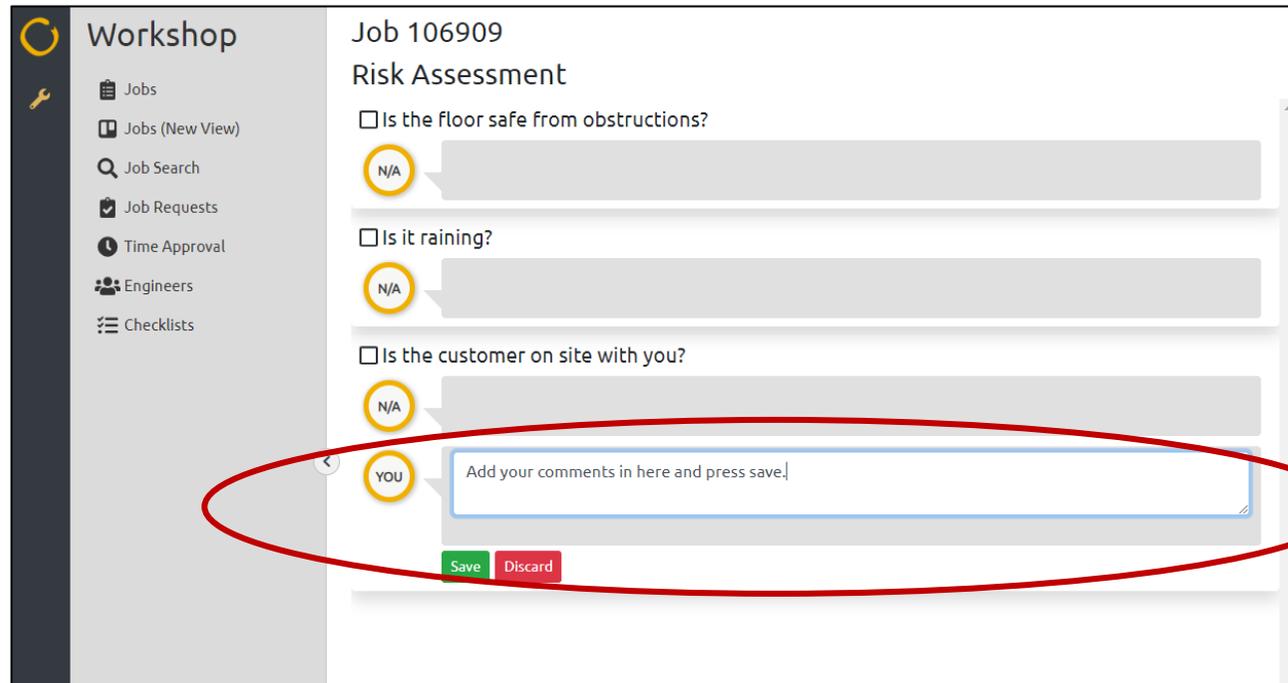
### Did you know?

You can click on the title of the Checklist to open a 'quick view'. This view will show you all the comments made by the engineer without you having to edit the Checklist to view this information.

## Editing completed Checklists within the Portal

Managers can edit the Checklist information that has been submitted by the engineer. In the job on the Portal, go to the Checklist tab. Press the 'edit' button located to the right hand side of the Checklist you want to amend. This will open the Checklist in full detail. Each item will display the engineers number to indicate who has completed it.

To edit an item, double click into the grey box and amend the item as necessary. Save these individual changes by pressing 'save', or discard them by pressing 'discard'. If you save the changes, they will show as a new line under the original comment. To save all changes, press the green 'save' button at the bottom right-hand corner of the screen.



### Did you know?

If you amend an engineers comment, your changes will show as a new line underneath the original comment. Your 'ID number' will be visible next to this comment to show who has made the amendment.