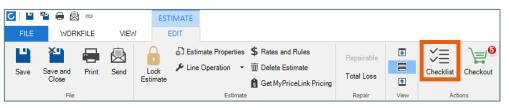
Completing Checklist Items

Introduction The Checklist is used to track when phases of the Pre-Repair, Post-Repair, and Repair Plan have been completed. Checklist items may require permission to be completed, these are based on your job role.



Note: The Task button is now called Checklist, all tasks will appear here.

Completing	Step	Action	
Checklist Items	1	Click on the Checklist button.	CHECKLIST
	2	To complete a checklist item, click the checkmark for each phase. If the phase requires additional action a dialog box may appear prompting, you to input the necessary information before the phase can be completed.	Tasks 03 4
			Contact Customer Training RF 14, Today 2:34PM
			Add Parts to Estimate Training RF 13, 8/05/2022 12:00PM - 6:00PM
			Order Parts Training RF 15, 8/08/2022 6:00AM - 8:00AM
			Repair Appointment Training RF 13, 8/11/2022 8:00AM - 8:30AM
	3	When the checklist item is marked as complete it will be date/time stamped and tagged with the person who marked the task as complete, this will be defined by the person who is currently logged in.	Tear Down Vehicle ✓ ···· Training RF 14, 8/11/2022 9:00AM - 11:30PM ✓ ···· Image: Complete items Image: Complete items OK

Note: The following message will appear in the Checklist items list if permision is required to complete the checklist items.

Confirm owner contact information Insufficient permission to complete this item.

Continued on next page



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Completing Checklist Items, Continued

Completing Checklist Items, continued Checklist items can also be completed by clicking the options icon or doubleclicking the Checklist item.

Add Parts to Estimate

Training RF 13, 8/05/2022 12:00PM - 6:00PM



This will open the options dialog box, here additional details about the Checklist item can be viewed.

Step	Action
1	Use the Close Event drop-down menu to mark the Checklist item as
	Complete or Cancelled.
2	When finished click OK .

Edit Task		×
1075 Training RF12	2019 GMC Sierra 1500 Crew C Insurance Company Silver	
TASK	HISTORY	
Task Type: Due Date: Assigned to: Workfile: Comments: 01	Add Parts to Estimate 08/05/2022 Image: Training RF 13 6:00 PM Training RF 13 V 1075 Make sure all parts are added to the estimate so that they can be ordered on time.	
Close Event:	Complete Cancelled 02 OK Cance	el

Note: If a Checklist item is marked as Cancelled the note section will be required. Select the **History** tab to view modifications to the Checklist items.

