

# Creating a Checklist Template

Think of a checklist template as the master recipe for a recurring task. You write it once, and from that point on, anyone on your team can follow the same steps every time, at every property without reinventing the wheel. Whether you're building a seasonal HVAC inspection, a roof walkthrough after a storm, or a move-out cleaning verification, templates keep the work consistent and the records clean.

This article walks you through building a template from scratch and explains every option available when setting up each item.

## Getting There

From the main navigation, click **Checklists**. The page opens with two sections. **Checklist Templates** at the top and **Fixture Checklist** below. All template work happens in the top section.

Click **+ New Checklist** to open the template panel and get started.

## Step 1 — Set Up the Template

The top portion of the panel is the template's identity card — it tells the system what this checklist is, who it belongs to, and how often it should run.

### Checklist Title *(required)*

Give your checklist a name that leaves no room for confusion. *Rooftop HVAC Quarterly Inspection* will serve you much better than *HVAC Check* six months from now when you're looking at a list of forty templates.

Minimum 2 characters.

### Trade

Assign this checklist to a specific trade — Electrical, Plumbing, HVAC, General Maintenance, and so on, or leave it at **Any Trade** if the checklist isn't tied to a specific type of work. This determines which work orders and vendors the checklist can be linked to when it's assigned in the field.

### Default Start Interval

When this template gets assigned to a fixture, how far out should the first due date land? Enter a

number and pick the unit:

Unit	Maximum
Days	150
Weeks	52
Months	12

Setting this to **3 Months** means every new assignment of this template automatically lands 3 months out on the calendar. You can always adjust individual assignments. This is just the sensible default so you're not starting from zero every time.

### Instructions (optional)

Got something important to say before the technician even looks at item one? Put it here. The rich-text editor supports bold, italic, lists, tables, and links so you can include safety warnings, required tools, reference documents, or a note like *"Do not attempt this inspection during active rainfall."* Instructions entered here appear at the very top of the checklist when it's opened in the field.

### Step 2 — Save the Template

Click **Save Checklist**. The record is created and the **Checklist Items** section appears below. Now for the fun part.

### Step 3 — Add Checklist Items

Each item is one task, one inspection point, or one step in the process. Click **Add Item** to expand the form and fill in the details.

### Item Fields Explained

#### Item Title (required)

Action-oriented titles age better than vague ones.

*Check condenser coil for debris and clean if needed* is clear, useful, actionable. *Condenser coil is* technically correct, completely unhelpful.

Minimum 2 characters.

#### Description (optional)

This is your chance to elaborate. Step-by-step instructions, acceptable tolerance ranges, reference measurements, specific product numbers, safety reminders — anything the person doing this task needs to know goes here. The rich-text editor gives you full formatting including tables, which is handy for things like pressure reading charts or torque spec tables.

**Example — Electrical Panel Inspection:** Title: *Inspect all breakers for heat damage or corrosion*  
Description: *Use a non-contact thermometer. Any reading above 140°F on a breaker at normal load warrants flagging. Document the breaker number and reading in the notes field.*

### **Checkboxes (optional)**

Some steps aren't one thing — they're five things that all need to happen. Rather than creating five separate items, you can load a single item with a set of sub-checkboxes. Type each one on its own line and the system turns them into individual checkboxes in the field.

### **Example — Filter Replacement item:**

Old filter removed and disposed of properly

New filter installed in correct airflow direction

Filter size and rating logged

Access panel secured

Thermostat reset to schedule

### **A few things to know:**

- Blank lines are ignored
- Duplicates are removed automatically (the system is forgiving if you're copy-pasting from a document)
- Checkboxes can't be used on PPE Detection steps — more on those below

### **Completion Requirements**

#### **Must Complete This Item**

The red star treatment. When this is checked, the field technician cannot submit the checklist without addressing this item — no skipping, no sneaking past it. Uncheck only for items that are genuinely optional in every situation, like *Photograph optional secondary access panel*.

Required items show a **red star (\*)** in the item list so you can see at a glance which items are locked in.

*Default: checked — because most items on a maintenance checklist probably matter.*

### **Zip File Required**

When you've attached a zip resource to this item (a wiring diagram, installation manual, or spec sheet — more on that below), checking this box means the technician must download and acknowledge that file before the item can be marked complete. It's the system's way of saying "you actually have to look at this, not just scroll past it."

## Notes

Three options. Pick the one that fits the item:

Option	What happens
<b>Note Allowed</b>	A notes field appears but it's optional. Staff can comment if there's something worth recording.
<b>No Note Allowed</b>	No notes field. Clean and simple — the item is pass/fail and a comment section would just add noise.
<b>Note Required</b>	Staff must type something before moving on. Perfect for items where a reading, measurement, or observation has to be on record.

**Example — Note Required use case:** Item: *Record static pressure reading across the air handler*  
With Note Required enabled, the technician has to enter the actual reading before they can check the box. The number lives in the record forever.

**Example — No Note Allowed use case:** Item: *Confirm unit is powered off before beginning work*  
This is a safety confirmation. There's no measurement to record and no variation — it's either done or it isn't.

## Signature Required

When this is checked, the person completing the item has to provide a digital signature before it can be marked done. Use this for safety-critical sign-offs, supervisor confirmations, or any step where accountability needs to be unambiguous.

**Example:** *Supervisor sign-off: all work completed and tested before leaving site*

Signature items show a **signature icon** in the item list.

## Images

Two controls work together here:

**Max Images Allowed** — A dropdown from 0 to 9.

- **0** means no photos on this item at all
- **1-9** sets the ceiling for how many photos can be attached

**Image Required** — When checked, at least one photo must be uploaded before the item is

complete. Only available when Max Images is 1 or higher.

**Example — Image Required use case:** Item: *Photograph equipment nameplate showing model and serial number* Set Max Images to 1, check Image Required. The record now always has the nameplate photo attached. No photo, no sign-off.

**Example — Max Images without Required:** Item: *Document any visible damage or wear* Set Max to 5, leave Image Required unchecked. If there's nothing to photograph, the technician moves on. If there are five things to document, they can capture all of them.

### **Illustrations (optional)**

These are reference materials *you* attach to the item — not photos taken in the field. Think wiring schematics, product installation diagrams, floor plan excerpts showing equipment locations, or any visual aid that helps the technician do the work correctly.

- Images open in a full-screen viewer
- PDFs open in a new tab
- Multiple illustrations can be attached to a single item
- Technicians can see them; they can't delete or replace them

Click **Upload Illustration** to attach files via the media uploader.

**Example:** Attach the manufacturer's maintenance diagram to a *Clean and inspect burner assembly* item so the technician has the correct exploded view right there in the checklist without having to hunt for it.

### **Zip File Resource (optional)**

Need to deliver a whole folder of materials to the technician for a specific step? Attach a zip archive. One zip per item, up to 3 GB.

This is the right tool for: firmware update packages, multi-document installation kits, collections of reference PDFs, or software tools needed to complete the task.

Click **Upload Zip** to attach. If **Zip File Required** is also checked, staff must download it before the item can be completed.

### **Can Annotate Images**

*(Available on accounts with the Annotation module)*

Checking this gives field staff the ability to draw directly on photos and illustrations — circling problem areas, adding labels, marking specific locations. The annotations become part of the permanent record.

**Example:** A roof inspection item where the technician photographs a cracked flashing and then

circles the crack and labels it "Active moisture intrusion — NW corner drain" before submitting.

## PPE Detection

(Available on accounts with the optional Detection Module)

This one's a bit different. Instead of a standard task item, PPE Detection turns this step into an automated safety verification — the system actually analyzes a photo to confirm the right protective gear is being worn before the step can be cleared.

When enabled:

- The standard form is replaced with the PPE verification panel
- The item becomes required automatically
- The technician must upload a photo, and the system checks it for the selected equipment

### Select the gear to verify:

Code	Equipment
VEST	Safety vest
HELMET	Hard hat
GLOVE	Gloves
PERSON	Person present in frame
BOOTS	Safety boots
GLASS	Safety glasses

**Example:** For a rooftop electrical inspection checklist, add a PPE Detection step as item one — *Confirm PPE before beginning work* — and select VEST, HELMET, and GLASS. The technician snaps a selfie in their gear, the system verifies the equipment is present, and only then can they proceed to item two. No gear, no green light.

## Managing Items

### Reordering

Each item has **up** and **down** arrows. Click to shift an item one position. The first item has no up arrow; the last has no down arrow. Build your checklist in the logical sequence a technician would actually follow — don't make them jump around.

### Editing an Item

Click anywhere on an item row to expand its edit form. Opening one item automatically collapses the one you were looking at, so the list stays readable.

## Deleting an Item

Open the item's edit form and click **Delete Item**. Permanent — so give it a moment's thought before clicking.

## Item Status Icons at a Glance

The item list shows a row of small icons for each item so you can read the configuration without opening it:

Icon	What it means
* Red star	Item is required
Signature	Signature required
Paintbrush (blue)	Has an illustration attached
Paint tool	Annotation enabled
Image	Photos allowed
Image + red slash	No photos allowed
Image + checkmark	Photo required
Comment bubble	Notes allowed
Comment + red slash	No notes allowed
Comment + checkmark	Notes required
Archive icon	Zip file attached

A quick scan down the icon column tells you a lot about how a checklist is structured — which items are high-accountability, which are documentation-heavy, and which are straight pass/fail.

## Duplicating a Checklist

Built a solid template and need a close variation of it? Open the template and expand the **Duplicate** section at the bottom of the panel. Give the copy a new name — the system helpfully pre-fills it as *[Original Name] COPY* — and click **Duplicate**.

Everything comes along for the ride: all items, all illustrations, all zip files. Edit the copy freely without touching the original.

## What Happens Next

A template on its own just sits in the library. The action happens when you assign it to a specific fixture on a property — at that point, a live instance is created with its own due date, completion record, and history. The template stays pristine and reusable. The instance is the real-world paperwork.

Head to the **Checklists** tab on any property to put your new template to work.

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