Company Settings for Checklists

Setting your company's checklist preferences helps admins and agents maintain efficient workflows by determining how checklists are added, displayed, and managed on transactions.

Introduction

Setting your company's preferences for checklists on transactions helps admins and agents maintain organized and efficient workflows.

Your company checklist preferences determine how checklists are added and displayed on transactions, ensuring tasks are tracked and completed effectively across your account.

Configured by a Master Admin, these preferences can be tailored to suit your company's operational needs. You can choose to show or hide checklist completion status, manage the visibility of completed tasks, and control the availability of checklist templates for manual addition to transactions.

Hide Checklist Completion Percentage from Agents

Hide Checklist Completion Percentage from agents on transactions when agents aren't heavily driven by completion metrics and only admins need to see it.

Who Can Do This: Master Admins can set account-wide preferences.

To hide Checklist Completion Percentage from agents:

1. **Access Company Settings**.
2. **Scroll to Settings**: Scroll down to the section for *Checklist Settings*.
3. **Set Your Preference:**
    - Uncheck the box next to [Show Checklist Completion Percentage to Agents] to hide it.
    - Check the box to show it.
4. **Save Settings**: Scroll to the bottom of the page, then click [Save Settings].

Show Completed Tasks in Transaction Checklists

Show Completed Tasks in transaction checklists.

Who Can Do This: Master Admins can set account-wide preferences.

To hide Checklist Completion Percentage from agents:

1. **Access Company Settings**.
2. **Scroll to Settings**: Scroll down to the section for *Checklist Settings*.
3. **Set Your Preference:**
    - Uncheck the box next to [Hide Completed Tasks in Transaction Checklists] to show them.
    - Check the box to hide completed tasks.
4. **Save Settings**: Scroll to the bottom of the page, then click [Save Settings].

Hide Checklists from All Locations in the Add Checklists Dropdown Menu

Hide checklists from all locations to only show those that belong to the transaction's location as available when manually adding checklists to transactions.

Who Can Do This: Master Admins can set account-wide preferences.

To hide Checklist Completion Percentage from agents:

1. **Access Company Settings**.
2. **Scroll to Settings**: Scroll down to the section for *Checklist Settings*.
3. **Set Your Preference:**
    - Uncheck the box next to [Show checklists from all locations in the Add Checklists dropdown menu] to hide them.
        - Agents and admins can only add checklists from the transaction's location.
    - Check the box to show checklists from all locations in the Add Checklists dropdown menu.
        - Agents and admins can add any checklist to transactions.
4. **Save Settings**: Scroll to the bottom of the page, then click [Save Settings].