User Permissions for Checklists

Briefly explain the main action and benefit to provide an action-oriented summary that highlights what you can do and the benefits you will gain.

Introduction

Grant Checklist Permissions to agents and admins. Both can be granted permission to apply checklists to transactions, while admins can be granted permission to fully manage checklist templates and tasks on transactions.

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On transactions, agents and admins can view tasks in the Checklists Area based on each task's visibility settings.

If they have permission to assign checklists, agents and admins can manually apply checklists to transactions.

Admins with permission to fully manage checklist templates and tasks can manage checklist templates, as well as handle tasks on transactions as needed, including adding new tasks, editing existing tasks, changing due dates, completing tasks, and deleting tasks.

By clearly defining checklist permissions, you can ensure a streamlined transaction workflow, enhancing task management and accountability across roles.

How It Works

Built-in Checklist Permissions

Enterprises can optionally designate an Enterprise Owner. An Enterprise Owner has the same authority as Enterprise Admins, with the additional authority to shut down the Enterprise.

If an Enterprise Owner is designated, the Owner is the only person who has the authority to close the Enterprise.

If no Enterprise Owner is designated, any Enterprise Admins can close the Enterprise.

User Permission: Assign Checklist Templates to Transactions

Agents and admins can be granted permission to assign checklist templates to transactions they can view. This permission does not allow users to check off items, change checklist tasks or due dates. Therefore, this permission is suitable for agents.

Suitable for agents.

User Permission: Fully Manage Checklists and Templates

Allows users to manage all aspects of checklists such as: manage checklist templates, check-off, edit or delete checklist tasks, change due dates on tasks, and assign checklist templates to transactions.

We recommend giving this permission only to your admins since it allows users to add, change, remove, and check off all tasks; and add or remove checklists on transactions.

Not suitable for agents.

Fully manage checklists and templates permissions allow users to oversee all aspects of checklists. This level of access should only be granted to admins, as it enables admins, in locations where they have "Fully manage checklists" permissions, to manage Checklist Templates and fully handle checklists and tasks on transactions.

Admins with *Fully manage checklists and templates* permission can, in Location(s) where they have that permission:

- Add and manage Checklist Templates
- Add and manage Checklists on Transactions
- Complete Tasks on Transactions

How It Works

Provide a clear, step-by-step explanation of how a particular feature or function operates within the system.

Format:

- **Title:** Begin each section with a brief, descriptive title.
- **Overview Paragraph:** Start with a concise overview of the feature or function, explaining its purpose and relevance.
- **Detailed Steps or Descriptions:** Break down the process into clear, actionable steps or detailed descriptions.
- **List of Actions:** Include a bulleted or numbered list of specific actions, permissions, or capabilities.
- **Additional Details:** Provide any additional necessary details or exceptions to ensure full understanding.
- **Maintain Clarity and Consistency:** Ensure the language is straightforward, maintaining a consistent and professional tone throughout.

Field / Function

Begin with an optional introduction that provides a brief overview of the feature or function, its purpose, and its significance to the user.

Field / Function

Provide a detailed description of the feature or function. Explain how it operates within the system and outline its main capabilities.

Users can:

- **[Action 1]:** Describe the first action that users can take, highlighting its purpose and benefit.
- **[Action 2]:** Describe the second action, emphasizing how it helps the user.
- **[Action 3]:** Explain another action or capability, focusing on its importance and usage.
- **[Action 4]:** Mention any additional actions, detailing their functionality and advantages.

Field / Function

Offer more specific details about the feature or function, particularly any roles, permissions, or exceptions. Explain any limitations or special conditions that apply.

Users with specific roles have:

- **[Permission 1]:** Describe the first permission or restriction, noting its relevance and impact.
- **[Permission 2]:** Outline another permission or limitation, explaining how it affects usage.
- **[Permission 3]:** Mention any other permissions or restrictions, ensuring users understand their implications.

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Grant Agent Permissions for Checklists

Grant Admin Permissions for Checklists

Start with the action ("Add a Thing...") and highlight the benefit to provide an action-oriented summary that highlights what the reader will learn to do and the benefits they will gain.

Who Can Do This: People with this permission can add new Things. State the audience (person's role) and define any necessary permissions required to complete the action.

To do a Thing:

1. Go to...
2. Do this...
3. Do that...
4. Save...

Provide a success note if needed.

Provide a danger note if needed.