Create a checklist to manage tasks

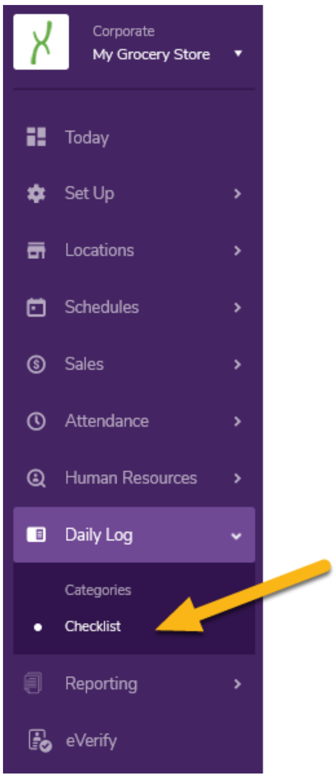
TimeForge's task management solution allows managers to create to-do lists, checklists, and other kinds of task lists. These checklists can be used for anything you can imagine! Regular maintenance or cleaning, daily sanitation of workstations, inventory review - just about any kind of to-do item you might want to assign and track.

This guide will walk you through the process of setting up a new checklist.

Navigate to the Checklist page

Once you're logged in, open the **Daily Log tab** and select **Checklist**.

If your account has multiple locations, make sure that you are at the Corporate Level.

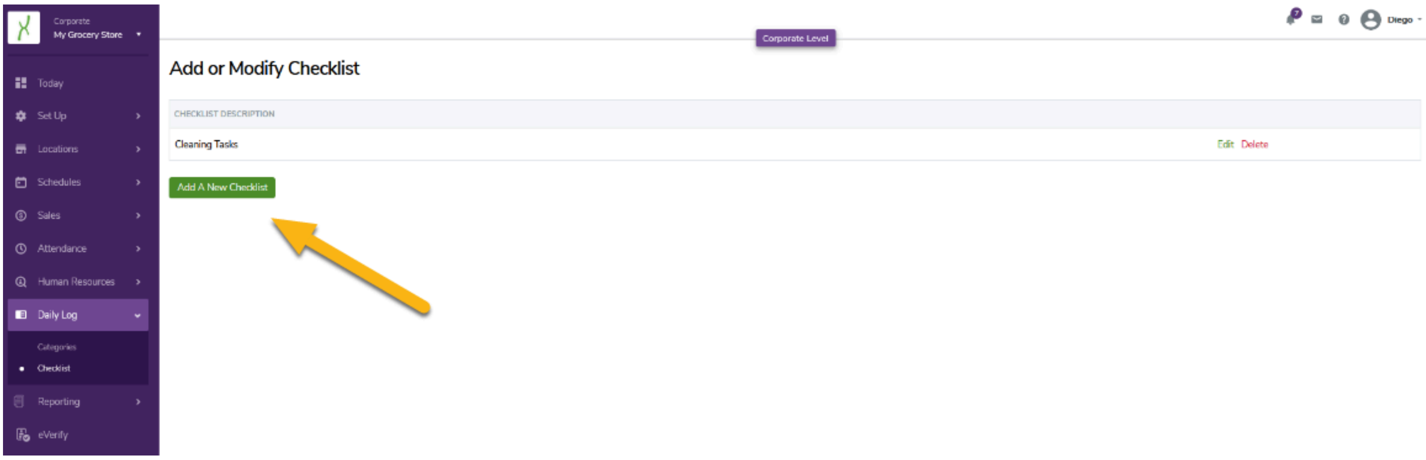


The task management module is an add-on for TimeForge. If you don't see the Checklist option, it means task management hasn't been enabled for your account yet. Please reach out to support@timeforge.com for more information.

Add a new Checklist

The Checklist page shows all of your Checklists.

To create a new Checklist, click on the **Add A New Checklist** button.

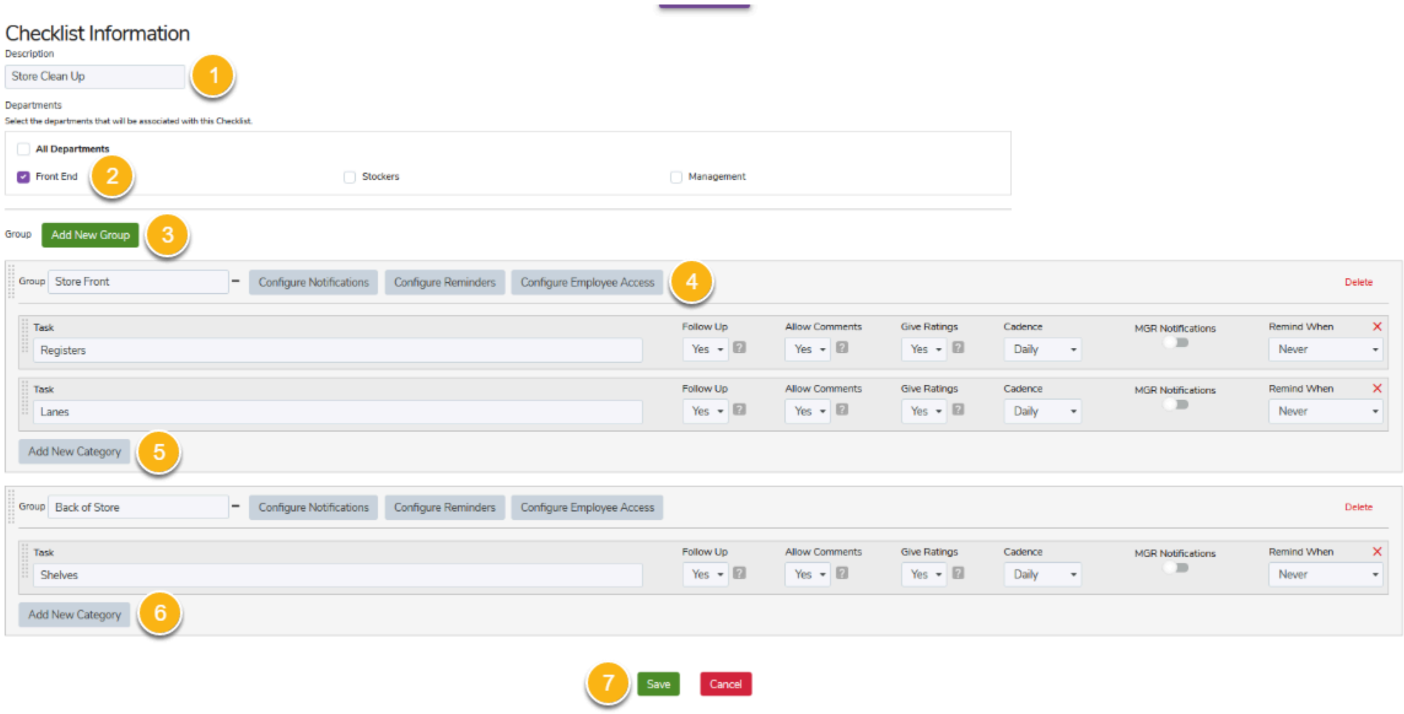


Define your Checklist

When you create a new checklist, you will add to-do items or tasks, grouped in whatever way makes the most sense for your business.

Each task can be flagged with different options that control things like whether you should receive notifications or reminders about them, how often the tasks should be completed, etc.

These options are explained below.



1. **Enter Description of your Checklist**
2. **Select Departments:** Check the appropriate departments associated with this Checklist.
3. **Add a Group by clicking on the "Add New Group" buttons:** Groups allow you to arrange your Checklist into sections. For example: a Group called "Store Front" that holds all things regarding to the front of the store.
4. **Configure Notifications/Reminders and Employee access:** Configure Notifications allows you to pick which employees TimeForge informs of a new task waiting to be completed. Configure Reminders allows you to select who receives a notification when any item in this group becomes past due. Lastly, you can pick which employees see and interact with the Categories in the group when you select Configure Employee Access.
5. **Add Categories to your Groups:** Categories are the individual items or tasks in you checklist. For example: Checking lights or stocked items.
6. **Set the options:** Each task can be set up allow [Follow-Ups](), Comments, or Ratings. A Follow-Up allows you to set an employee to follow up with regarding that specific task. Comments are simple comments attached to a task. Ratings allows you to give a task a star rating.
7. **Save:** Click the "Save" button at the bottom of the page.

That's all there is to it!