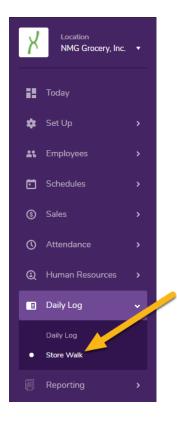
Complete the tasks on your checklist

Once your <u>Checklist has been created</u>, you can check off the items there, either from your browser or using a tablet or mobile device. This is sometimes referred to as "going on a store walk," but TimeForge's <u>task management solution</u> actually supports all kinds of to-do lists. Walking the store is just one of the many things you can do with our built-in checklists.

In this guide, you'll learn how to complete the tasks on your checklist.

Navigate to Store Walk

Once you're logged in, open the **Daily Log tab** and click on **Store Walk** in the menu.

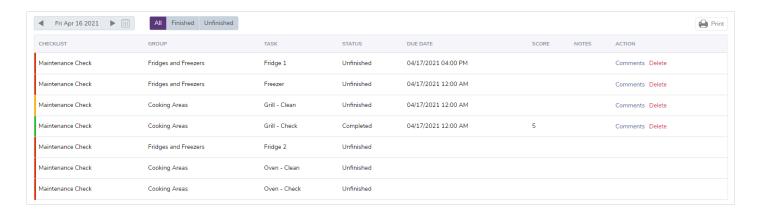




If your account has multiple locations, make sure you have a location selected and that you're not at the Corporate level.

Select a task from those available

Tasks will be listed in a table that includes the checklist they belong to, which group, the task name, status, due date, score, notes, and finally any additional actions that may be taken. To select a task, simply click on a row:



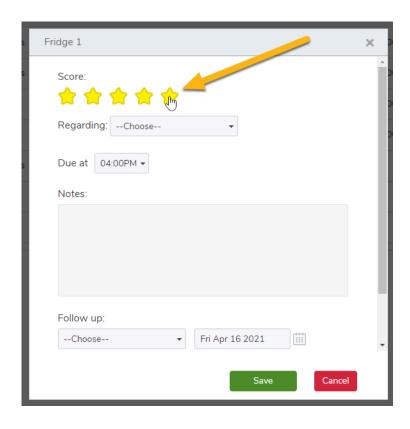
Note the colored bar on the left side of each row.

- When an item is Red, it is not started or is still incomplete.
- When an item is Green, it is all complete.
- When an item is Yellow-Orange, it is still waiting for Follow Up.

When you select a task, a pop-up will appear with various options. The options will depend on how the task was configured (for example, if it was set to allow ratings or follow-ups).

Rate a task

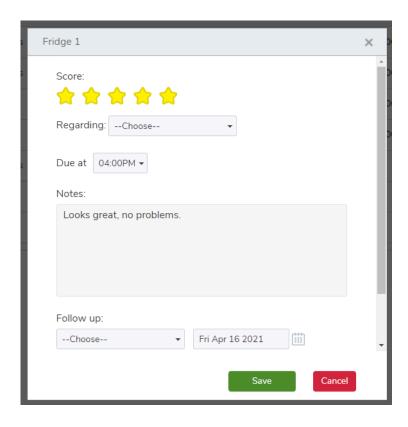
If ratings are turned on for the task, you'll see 5 stars at the top. Click a star to set the rating on the task:



Add notes and other details

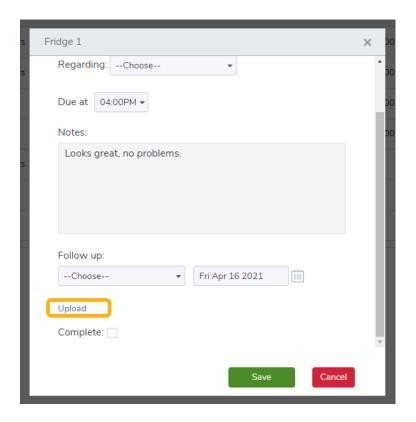
Under the score/rating area, you can select an employee to associate with the task, adjust the due date, and add any notes.

If the task allows for follow-ups, you can choose someone to be responsible for the follow-up and indicate when it should occur.



Add attachments (if any) and mark as complete if complete

Near the bottom of the task, there's an option to <u>upload files, such as images, documents</u>, etc. Under that is a checkbox to mark the task as complete, if it's done.



Save your changes

When everything looks how you want it, don't forget to save your changes!

