Checklinx

User Guide

Creating your Account

1. **Visit Checklinx.com.au**
   a. Select the blue "**SIGN UP/SIGN IN**" button
   b. Select "**SIGN UP**"
   c. Enter your email address and tick to acknowledge that an email will be sent to you for confirmation
   d. Select "**Verify**" and look out for the verification passcode email
   e. Enter the 6-digit code and click "**Verify**"

2. **Enter your details**
   a. Your first and last name
   b. The organisation's name
   c. Select your country
   d. Create an 8-character password with at least: 1 special character, 1 number and 1 upper case letter
   e. Review and agree to the terms and conditions
   f. You will receive a "**Welcome to Checklinx**" email once your account has been created

3. **Signing in first time**
   a. Click the Visit Checklinx button in the email or return to the website and select "**SIGN IN**"
   b. Now that you have logged into your account, you can start managing your assets
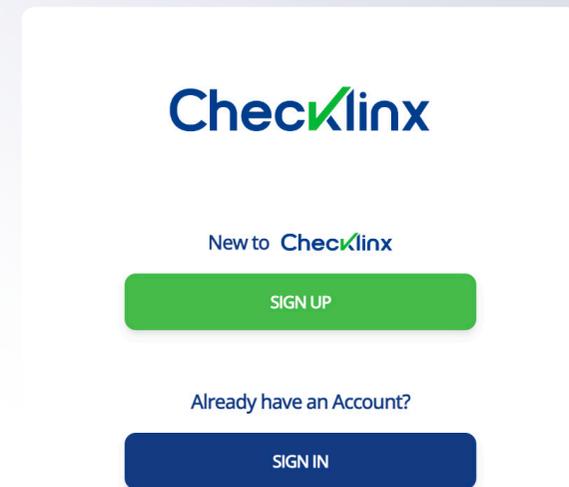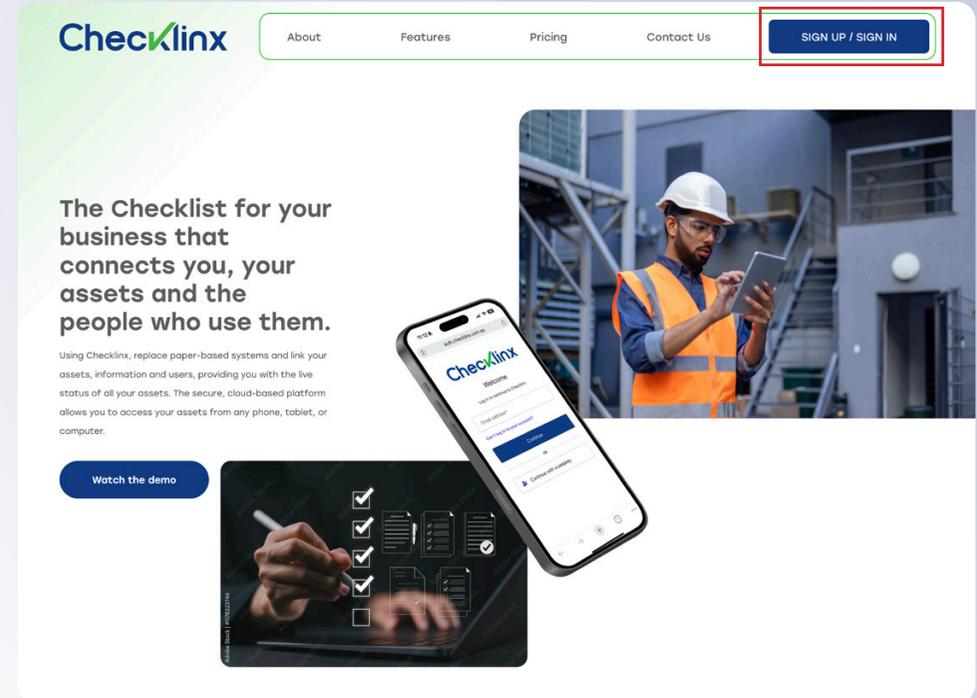
Getting Started with Checklinx

Once you're logged in, getting started is a simple 3-step process

Step 1: Create an Asset
Here is where you register as many assets and as much detail as you like.

Step 2: Assign a Checklist
In the second step, you will create and assign checklists for each asset.

Step 3: Assign Users
In the final step, you'll register and assign users to your assets.

Select "**GET STARTED**". This will take you to the Assets section of the menu.

GET STARTED WITH **Checklinx**
Follow these steps to begin managing your assets

Step 1: Create an asset
Register assets in the system

Step 2: Assign a checklist
Create & Assign checklist for the assets

Step 3: Assign users
Register & Assign users

GET STARTED

Step 1: Create an Asset

Select "**CREATE ASSET**"

a. Choose an asset category, "Fixed" or "Mobile".
Fixed Assets are permanent fixtures such as offices, warehouses, retail stores, production equipment, office furniture etc.
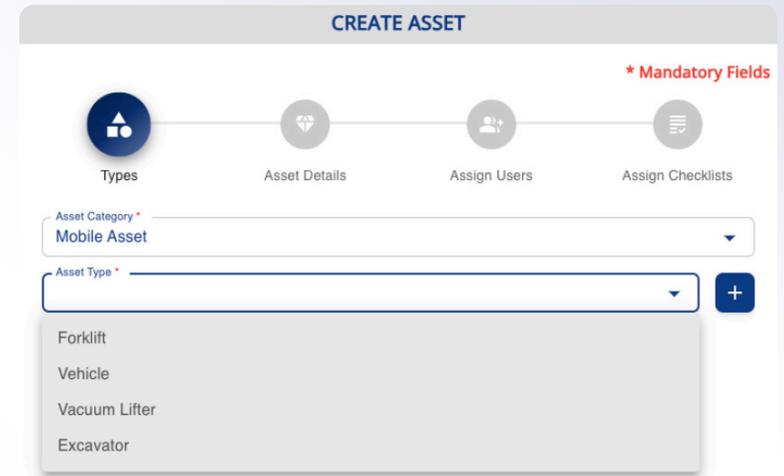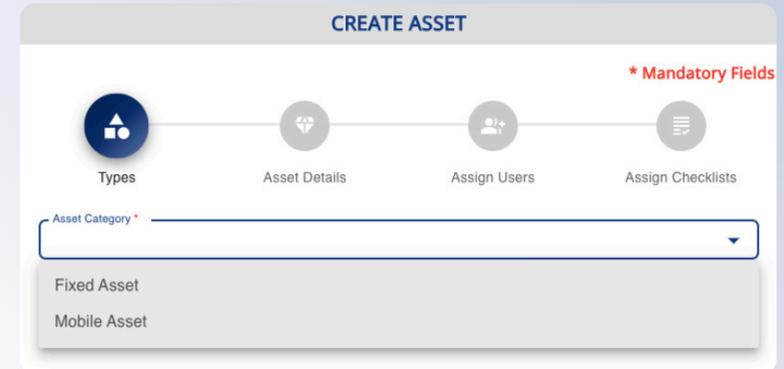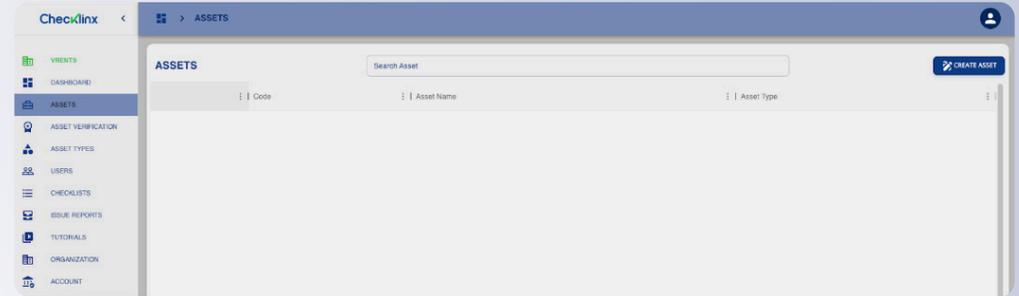
Mobile Assets include things such as cars, trucks, forklifts and construction equipment.

b. Select or create a type of asset.
Choose one of the pre-made asset types or create your own by selecting the "**+**" button

Every new Asset Type you create will be available to select from the drop-down menu next time you create a new asset.

Select "**NEXT**"

c. Enter the Asset details

The Asset Name is the unique name you call your asset.

The Asset Code is the unique code you would like to assign to each asset.

Add the details of the asset.

Select "**NEXT**"

If you don't need to assign a checklist or a user to the asset, you can skip these screens by selecting "**NEXT**" then "**CREATE ASSET**".
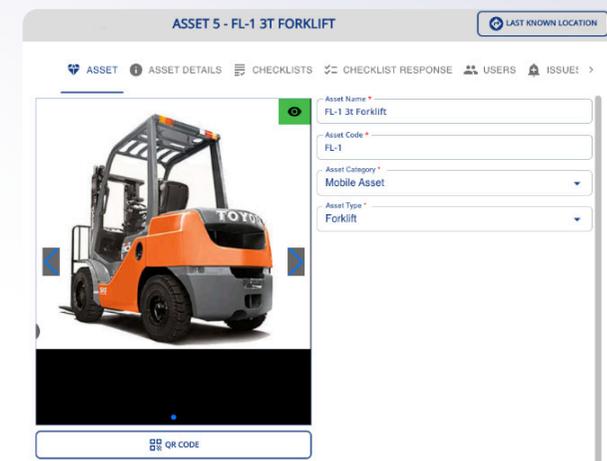
Your Asset has been created successfully.
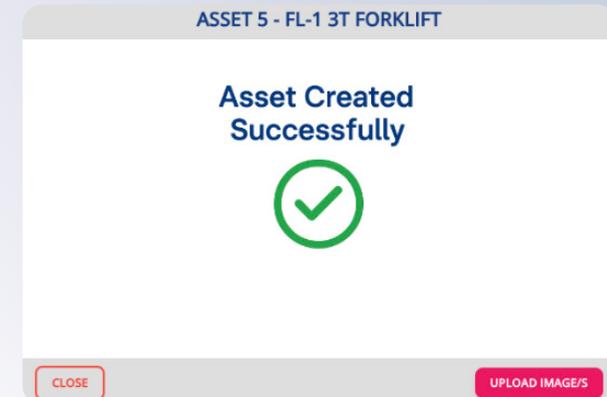
Select "**UPLOAD IMAGE/S**" to add photos of the asset.

You can either upload a photo or several photos from your computer or add a link to an image stored elsewhere.

Select "**EDIT**" to add additional photos, Asset Details, Checklists and Users.

Select "**QR CODE**" to view and print the unique QR code to be attached to the asset.

Step 2: Assign a Checklist

Creating and assigning a checklist can be done in three ways:

- When creating an Asset in Step 1
- By editing the Asset from the "**ASSETS**" menu item
- Via the "**CHECKLISTS**" menu item.

In either option, the process is the same.

From the **CHECKLIST CONFIGURATIONS** screen, a checklist can be created manually (eg copy a checklist from an Operator's Manual), or you can use AI to assist in creating a checklist.

Enter a checklist manually

a. To manually add a checklist, select "**CREATE NEW CHECKLIST**".

b. In the Checklist Name field, enter a name for your new checklist.

c. Use the dropdown next to the Checklist Name to select an existing checklist to copy items from, if applicable.

d. To add new checklist items:
   - Type a description for your checklist item in the Description field.
   - Click the plus (**+**) button to add the item to the list below.

e. If you want to add checklist items from checklist pool, select "**ADD CHECKLIST ITEM**" button.

f. Add a new item to the checklist pool.
- In the **Description** box, type the new checklist item.
- Tick the "**Required**" checkbox if the item must be mandatory.
- Click the "**CREATE**" button.
- The newly created item will appear in the checklist item pool above.
- Tick the checkbox next to any item(s) you want to include in the checklist.
- You can also mark them as "Required" if needed.
- After selecting the desired items, click the "**ADD TO CHECKLIST**" button.
- Click "Close" button to close window.

g. Review your Items
- The added checklist items will appear in the table.
- Use the "Remove" option to delete any unwanted item before creating.

h. Select "**CREATE CHECKLIST**". The checklist created can now be assigned to designated assets.

i. Select "**CLOSE**"

CHECKLIST ITEMS

Search from pool

☐ | Description ⋮ | Required ⋮ | Delete ⋮ |

No rows

Rows per page: 10 ▼   0–0 of 0   ‹ ›

NEW ITEM

Description   ☐ Required   [CREATE]

[CLOSE]

ASSET 5 - FL-1 3T FORKLIFT   [⊕ LAST KNOWN LOCATION]

🔷 ASSET   ⓘ ASSET DETAILS   ☰ CHECKLISTS   ✓☰ CHECKLIST RESPONSE   👥 US ›

[NEW CHECKLIST GROUP]

Checklist
_____ ▼

Pre-start Checklist

Forklift Pre-start Checklist

Enter a Checklist using AI

To utilise the AI feature, select "**CREATE CHECKLIST WITH AI**" then click the "**CHECKLIST WITH AI**" button

Enter the type of checklist you want to create. For example, "Forklift Pre-start Checklist".

Choose how many items you want to have.

Select "**NEXT**"

A suggested Checklist will be created.

Items can be added or deleted from the suggested list.

Check the "Required" box on each of the items to make them mandatory.

Select "**CREATE CHECKLIST**".

The checklist created can now be assigned to designated assets.

Choose the correct checklist from the drop-down menu and select "**SAVE**".

Editing a checklist

a. Click "**EDIT CHECKLIST**".

b. In the **Checklist** dropdown, choose the checklist you want to edit.

c. Add Checklist Item.
Under the **ADD CHECKLIST ITEM** section:
- Enter your checklist item in the Description input field.
- Click the **+ (plus)** button to add the item.

d. If you want to add checklist items from checklist pool, select "**ADD CHECKLIST ITEM**" button.

e. You can edit checklist items in the checklist pool.
- Double-click on the item you want to edit.
- Edit item.
- Press "**Enter**".

f. If you want to edit the checklist name,
- Enter the new name in the **Rename Checklist Name** field.
- Click the **RENAME CHECKLIST** button.

g. If you want to delete a created checklist, click '**DELETE CHECKLIST**'.

Step 3: Assign Users

Creating and assigning users can be done in three ways:

- When creating an Asset in Step 1
- By editing the Asset from the "ASSETS" menu item
- Via the "USERS" menu item.

Select "**NEW USER**"

Select User Type by choosing either External (eg Contractors, or anyone from outside your organisation) or Internal

Select "**CREATE JOB ROLE**"

Fill in the User Role then select "**CREATE ROLE**"

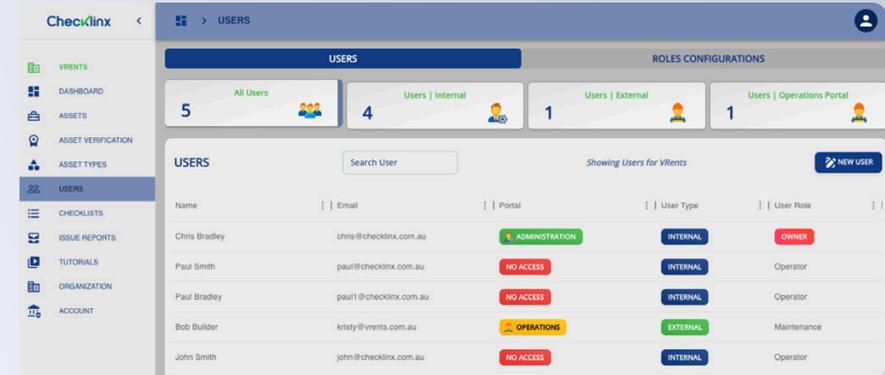You can then select this role you just created or continue creating more roles by selecting the "**+**" symbol.

Select "NEXT"

Enter the user's basic details.

Select if the user is to have access to the Administration, Operations or No Access to the Portal.

Add additional fields by selecting the "**+**" symbol.

Select "**CREATE USER**"
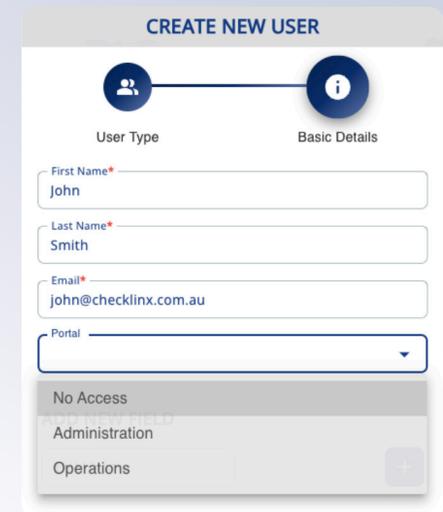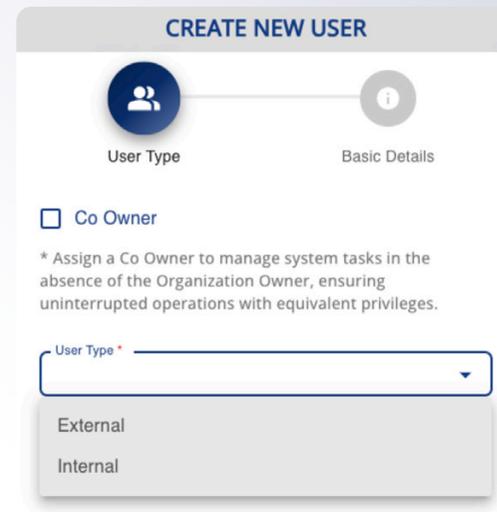
The user will be created and will now appear on the User Dashboard.

Users can be allocated to assets as Primary, Secondary or Other Users.

Each asset can have several users allocated based on their roles, responsibilities and or qualifications.

Select "**SAVE**"

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contact@checklinx.com.au