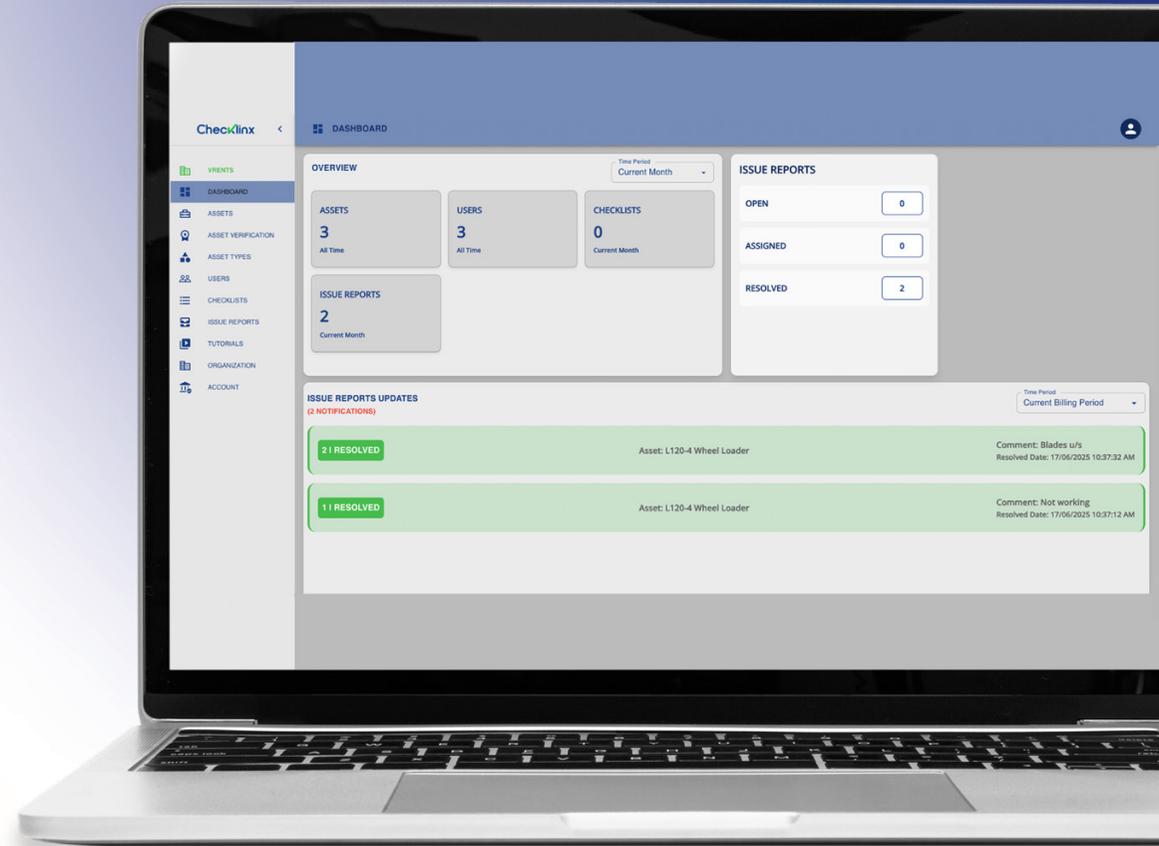


User Guide



Creating your Account

1. Visit [Checklinx.com.au](https://checklinx.com.au)

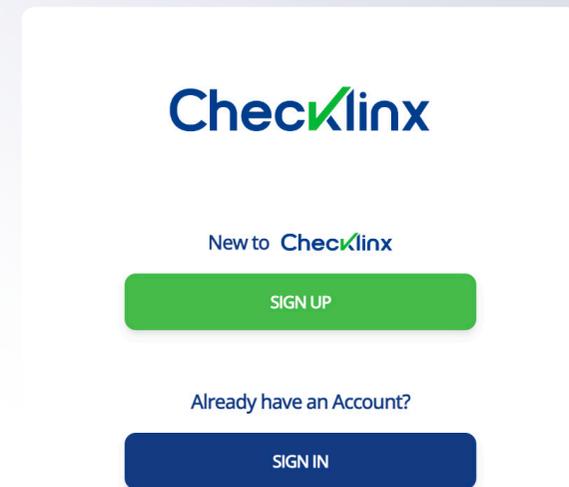
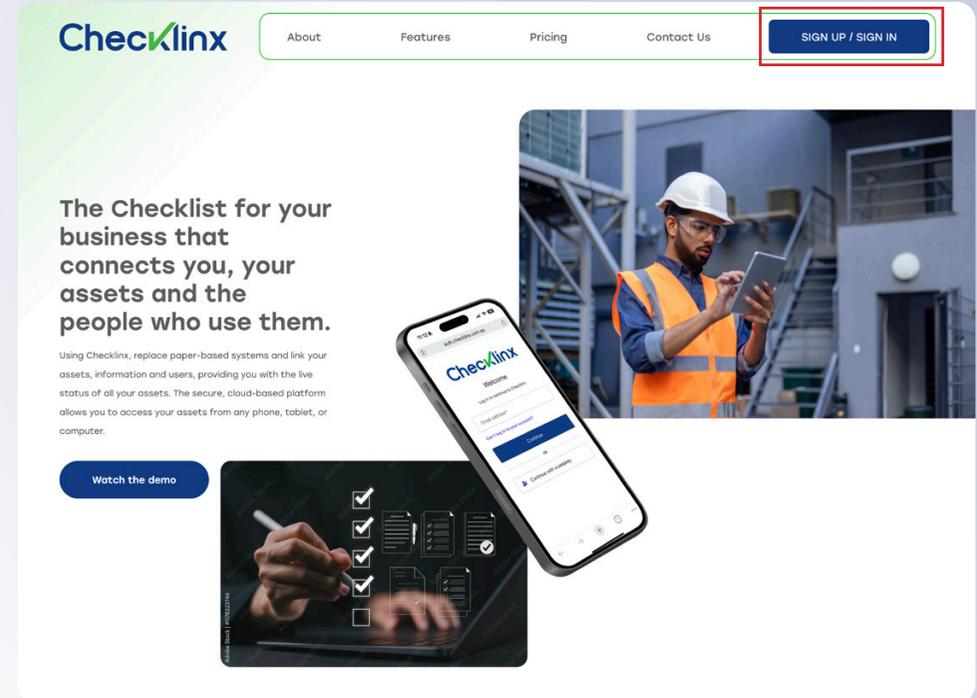
- Select the blue **“SIGN UP/SIGN IN”** button
- Select **“SIGN UP”**
- Enter your email address and tick to acknowledge that an email will be sent to you for confirmation
- Select **“Verify”** and look out for the verification passcode email
- Enter the 6-digit code and click **“Verify”**

2. Enter your details

- Your first and last name
- The organisation’s name
- Select your country
- Create an 8-character password with at least: 1 special character, 1 number and 1 upper case letter
- Review and agree to the terms and conditions
- You will receive a **“Welcome to Checklinx”** email once your account has been created

3. Signing in first time

- Click the Visit Checklinx button in the email or return to the website and select **“SIGN IN”**
- 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.

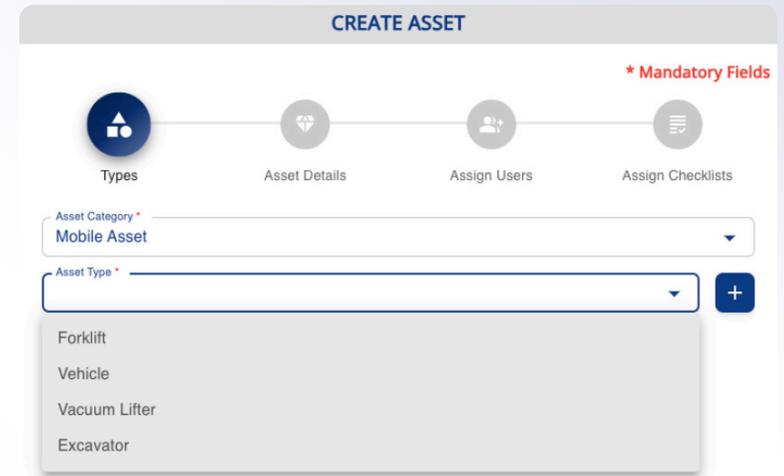
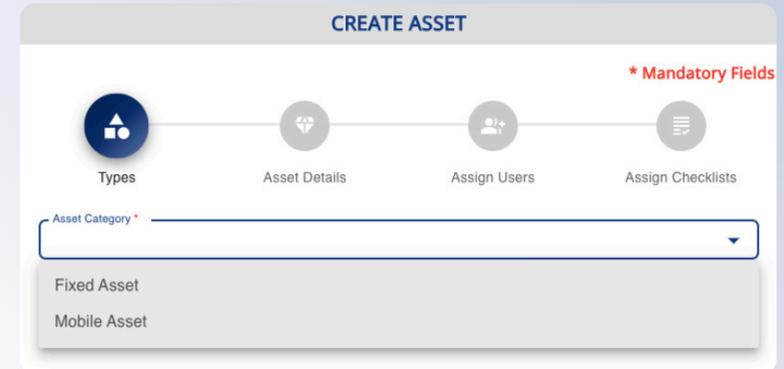
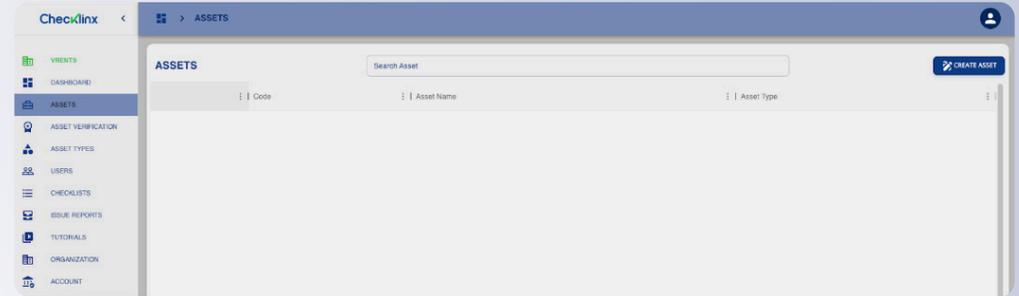
Mobile Assets include things such as cars, trucks, forklifts and construction equipment.

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”**

CREATE ASSET

* Mandatory Fields

Types Asset Details Assign Checklists Assign Users

Asset Name* FL-1 3t Forklift Asset Code* FL-1

Make Toyota Model TFL-3T

Serial Number 123456 Description 3t Container Forklift

Vehicle Number Year of Manufacture 2024

Registration Number ABC123 Colour Red

Rated Capacity 3000 kg Max Lift Height 6m

Dealer Melbourne Forks Warranty Expiry Date 30/06/2028

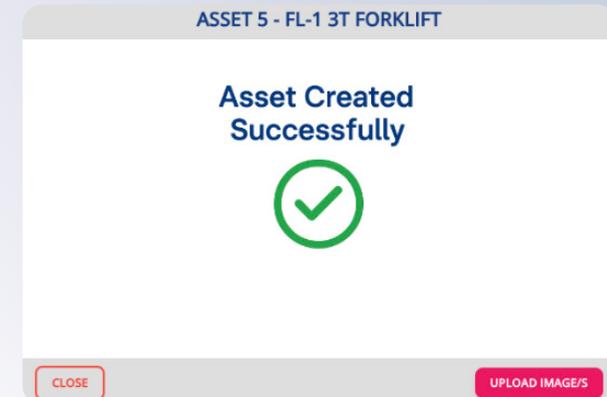
Warranty Expiry Kilometres Driver

ADD NEW FIELD

CLOSE PREVIOUS 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.

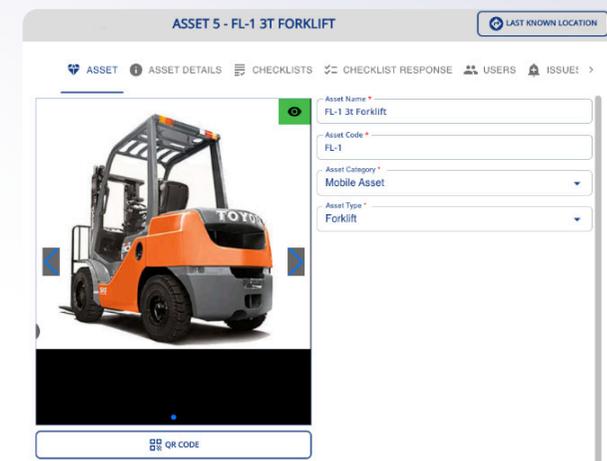


Select **“UPLOAD IMAGE/S”** to add photos of the asset.

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

- To manually add a checklist, select “**CREATE NEW CHECKLIST**”.
- In the Checklist Name field, enter a name for your new checklist.
- Use the dropdown next to the Checklist Name to select an existing checklist to copy items from, if applicable.
- 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.

The screenshot shows the 'CREATE ASSET' workflow. At the top, it says 'CREATE ASSET'. Below that, there's a progress bar with four steps: 'Types', 'Asset Details', 'Assign Checklists', and 'Assign Users'. The 'Assign Checklists' step is currently active and highlighted. To the right of the progress bar, there's a red asterisk and the text '* Mandatory Fields'. Below the progress bar, there's a large blue button labeled 'NEW CHECKLIST'. At the bottom, there's a dropdown menu with 'Checklist' selected.

The screenshot shows the 'CHECKLIST CONFIGURATIONS' screen. At the top, it says 'CHECKLIST CONFIGURATIONS'. Below that, there are three buttons: 'CREATE CHECKLIST WITH AI', 'CREATE NEW CHECKLIST', and 'EDIT CHECKLIST'. The 'CREATE NEW CHECKLIST' button is highlighted. Below the buttons, there's a form with two input fields: 'Checklist Name*' and 'Checklist (Copy From)'. To the right of the 'Checklist (Copy From)' field, there's a dropdown menu and a blue button labeled 'ADD CHECKLIST ITEM'. Below the input fields, there's a section titled 'ADD NEW CHECKLIST ITEM'. It has a 'Description' input field with a plus (+) button to its right. Below the input field, there's a table with one row containing 'Description' and a 'Remove' button. Below the table, it says 'No rows'. At the bottom right, there's a pagination control showing 'Rows per page: 10' and '0-0 of 0'. At the bottom center, there's a blue button labeled 'CREATE CHECKLIST'.

- 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

<input type="checkbox"/>	Description	Required	Delete
No rows			

Rows per page: 10 ▾ 0-0 of 0 < >

NEW ITEM

Required

ASSET 5 - FL-1 3T FORKLIFT

ASSET
ASSET DETAILS
CHECKLISTS
CHECKLIST RESPONSE
US >

NEW CHECKLIST GROUP

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**”.

CHECKLIST CONFIGURATIONS

CREATE CHECKLIST WITH AI CREATE NEW CHECKLIST EDIT CHECKLIST

AI Checklist CHECKLIST WITH AI

Description

CHECKLINX AI - CHECKLIST

About Checklist Suggested Checklist

What Type of Checklist* Checklist Type How Many Items: 5

CHECKLINX AI - CHECKLIST

About Checklist Suggested Checklist

Description	Required	Delete
Check the engine oil level.	<input type="checkbox"/>	<input type="checkbox"/>
Verify the coolant level.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Test the horn and lights.	<input type="checkbox"/>	<input type="checkbox"/>
Verify the functionality of the lift controls.	<input type="checkbox"/>	<input type="checkbox"/>
Inspect the seat belt for wear and functionality.	<input type="checkbox"/>	<input type="checkbox"/>

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**’.

The image displays two screenshots of the 'CHECKLIST CONFIGURATIONS' interface. The top screenshot shows the 'EDIT CHECKLIST' view, where a checklist is selected from a dropdown menu, and a 'Remove' button is visible. The bottom screenshot shows the 'ADD CHECKLIST ITEM' view, where a new item is being added to the checklist. The interface includes buttons for 'CREATE CHECKLIST WITH AI', 'CREATE NEW CHECKLIST', 'EDIT CHECKLIST', 'RENAME CHECKLIST', 'ADD CHECKLIST ITEM', and 'DELETE CHECKLIST'. A 'CLOSE' button is located at the bottom right corner of the interface.

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.

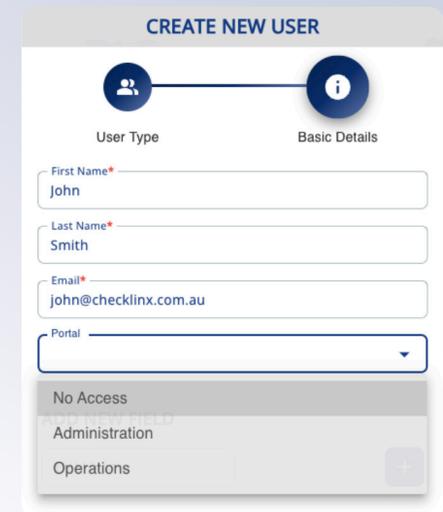
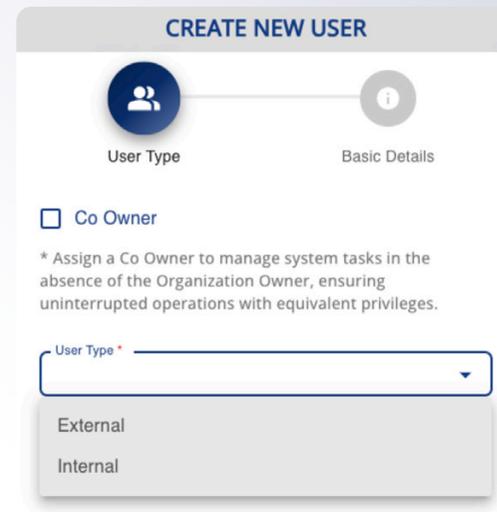
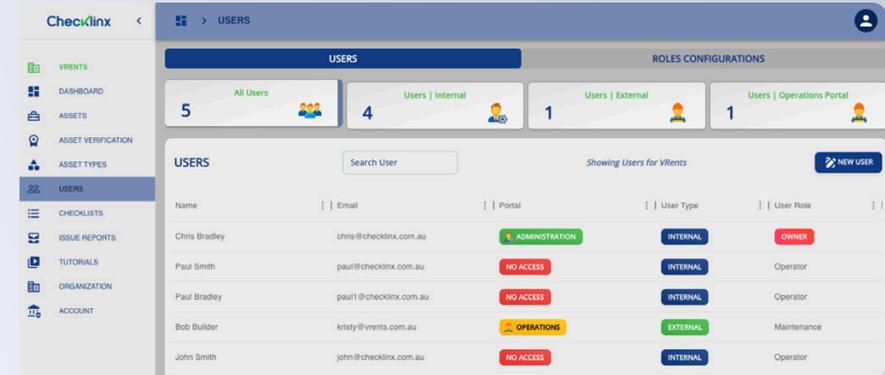
Select “**NEXT**”

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”**

The screenshot shows the 'USERS' dashboard. At the top, there are four summary cards: 'All Users' (5), 'Users | Internal' (4), 'Users | External' (1), and 'Users | Operations Portal' (1). Below these is a table of users with columns for Name, Email, Portal, User Type, and User Role. A 'NEW USER' button is visible in the top right.

Name	Email	Portal	User Type	User Role
Chris Bradley	chris@checklinx.com.au	ADMINISTRATION	INTERNAL	OWNER
Paul Smith	paul@checklinx.com.au	NO ACCESS	INTERNAL	Operator
Paul Bradley	paul1@checklinx.com.au	NO ACCESS	INTERNAL	Operator
Bob Builder	kristy@vrents.com.au	OPERATIONS	EXTERNAL	Maintenance
John Smith	john@checklinx.com.au	NO ACCESS	INTERNAL	Operator

The screenshot shows the 'ASSET 5 - FL-1 3T FORKLIFT' user allocation screen. It features a navigation bar with 'ASSET DETAILS', 'CHECKLISTS', 'CHECKLIST RESPONSE', 'USERS', and 'ISSUES'. A 'CREATE NEW USER' button is at the top. Below it are three dropdown menus for 'Primary User/s', 'Secondary User/s', and 'Other User/s'. The 'Other User/s' dropdown is open, showing a list of users with checkboxes: Chris Bradley, Paul Smith, Paul Bradley, Bob Builder, and John Smith.

Checklinx

contact@checklinx.com.au