

Creating Checklists

In this tutorial, you will learn how to use the MCL Checklist Wizard to create new checklists or edit existing lists.



- Home
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- Departments
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- Questions
- Checklists
- Reports
- Data Analysis
- Tasks
- Photo Management
- Sensors

Dashboard

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Completed Checklists

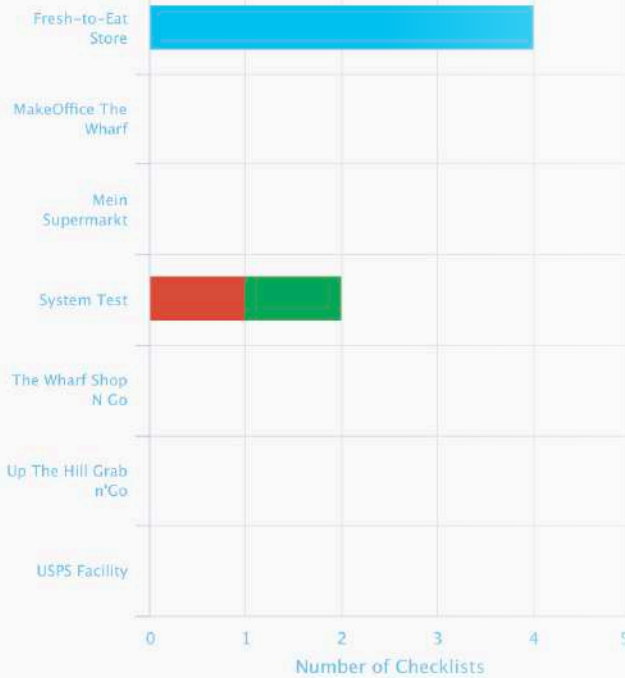


2

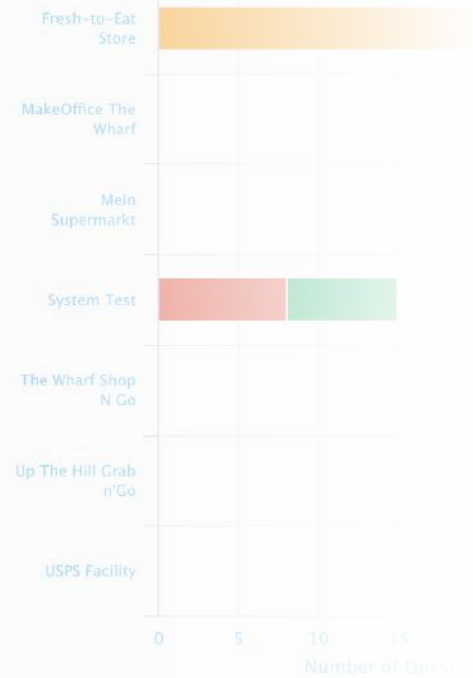
Delivered Tasks


Positive Answers
Negative Answers

Completed Checklists



Answers
















































Click on **“Checklists”** on the left side of your screen.



Checklistenverwaltung

solutions Deutschland


Neuen zu suchenden Text ein...

	Von	Bis	Wiederkehrend	Zugehörige Abteilungen	Unterschrift erforderlich	vollständige Konfiguration	Auswahl der Abteilung zulassen	
ite	23.07.2018		N.Z.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
ite			N.Z.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
rotokoll			N.Z.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
g (in the morning)	15.08.2018		TÄGLICH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
g (in the afternoon)	15.08.2018		TÄGLICH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
g (in the evening)	15.08.2018		TÄGLICH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
g HANDOVER	15.08.2018		TÄGLICH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
	30.07.2018		VIERTELJÄHRlich	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
heck (TK, Frische + Trocken)	14.08.2018		WÖCHENTLICH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
place, [Mo-Fr]			N.Z.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
place, [Sa+So]			N.Z.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
heck			N.Z.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
heck_2			N.Z.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
rotokoll (abends)	14.08.2018		TÄGLICH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
rotokoll (nachmittags)	14.08.2018		TÄGLICH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  

on 2 (20 Artikel)

1 2

Here you will see your existing checklists, including an overview of the lists' configuration.

To create a new checklist, click the  icon to launch the Checklist Wizard.

Preview

Christmas

12/2/2019

12/31/2019

DAILY

10:00 AM

12:00 AM

☒ Signature required

☐ Allow department selection

Continue



Note: All fields with * are mandatory.

First, you must name your checklist.

Enter a start-and-end-date
for the checklist to be active on a specific
calendar period.

For example, a “**Christmas**” checklist around the holidays.

You can set the periodicity of the checklist, determining how often (i.e. Daily, Weekly, etc.) it must be completed.

To set checklist as **available** at all times, “**N/A**” must be selected.



Christmas

From:

12/2/2019

To:

12/31/2019

Recurrently:*

DAILY

From: 10:00 AM To: 12:00 AM

☒ Signature required

☐ Allow department selection

Continue



Set start-time and end-time for checklist to be completed within that duration.



Finally, you may select configuration options:

To require a user to add an electronic signature when completing a checklist in the app and/or

To allow a user to select/deselect departments and their associated questions when completing a checklist.

To prevent a user from altering the scope of a checklist keep this section unchecked.



Once all entries have been made, click “**Continue**” to go to the next section.



- General
- Roles
- Departments
- Questions
- E-Mail
- Preview

Roles:*

☐ Auditor

☐ Checklist Administrator

☐ Company administrator

☐ Department manager

☐ Department supervisor

☒ District Manager

☒ Executive

☒ Store Manager

☐ Team Member



In the second panel, you select which roles have access to this checklist. Select all that apply.

Roles that were not selected will not see the checklist in their MCL Apps.

Continue

General Roles **Departments** Questions E-Mail Preview

Departments:*

☒ Aussenanlagen und Eingangsbereich

☐ Bedienung: Fleisch und Wurst

☐ Bedienung: Käse und Salate

☐ Butcher

☐ Check Out

☐ Frozen Foods

☐ Fruits & Vegetables

☐ Kassen

☒ Lager und Warenanlieferung

☐ MakeOffice 1st Floor

☐ MakeOffice 2nd floor



In the third panel, you select which departments the list will cover. Select all that apply.

Selecting a department **does not** mean that all questions for that department are included in the list.



Note: the selection of departments also determines for which stores the checklists will be made available. For stores that were configured without the departments selected, the checklists will not be shown in the MCL App.

Continue

Testverwalter

Checklist Wizard

General Roles Departments Questions E-Mail Preview

Departments:

- Aussenanlagen und Eingangsbereich
- Lager und Warenanlieferung
- Sortiment gesamt

Questions

Add	Question	Question Type	Sequence	Sensor
<input checked="" type="checkbox"/>	Ist der gesamte Eingangsbereich (Glas-, Wand-, Boden- und Aufstellflächen) ordentlich und sauber?	Yes/No	▲ ▼	
<input checked="" type="checkbox"/>	Sind die Einkaufswagenboxen in einem gepflegten Zustand und frei von Schmutz?	Yes/No	▲ ▼	
<input checked="" type="checkbox"/>	Wie beurteilen Sie den Gesamteindruck der Abteilung?	1 to 5	▲ ▼	
<input type="checkbox"/>	Sind alle Mülleimer geleert?	Yes/No		
<input type="checkbox"/>	Sind die Grünanlagen ordentlich, gepflegt und frei von Schmutz?	Yes/No		
<input type="checkbox"/>	Sind genügend Einkaufswagen vorhanden und sind diese gleichmäßig auf die Boxen verteilt.	Yes/No		
<input type="checkbox"/>	Test 1	Yes/No		
<input type="checkbox"/>	Test 2	Free text		

Continue



You can change the order of the questions by using the ▲ ▼ icons.

Select a department from the panel to select the questions you want the checklist to use.

First, select a department from the right-hand menu.

Next, select the questions by checking the boxes to add.

Select all questions you want to include from each department.

The order of departments themselves can be adjusted within the MCL Mobile App.



- General
- Roles
- Departments
- Questions
- E-Mail**
- Preview

E-Mail:

test@test.com

E-Mail to Role:

Department supervisor

Departments:

- ☐ Aussenanlagen und Eingangsbereich
- ☐ Bedienung: Fleisch und Wurst
- ☐ Bedienung: Käse und Salate
- ☒ Butcher
- ☒ Check Out
- ☒ Frozen Foods
- ☐ Fruits & Vegetables
- ☐ Kassen
- ☐ Lager und Warenanlieferung

Continue



Note: in case you want a specific checklist to be sent to a specific e-mail address or a specific role, enter the recipient e-mail for the report generated from this checklist.

This e-mail configuration is in addition to the e-mail address configuration options associated with the User, Market or Company.

You may also select for all users of a specific role to receive the report.

For example: Regional Manager



Testverwalter

Checklist Wizard

General Roles Departments Questions E-Mail Preview

Preview

Number	Questions	Question Type	More Info
Departments: Aussenanlagen und Eingangsbereich			
1	Ist der gesamte Eingangsbereich (Glas-, Wand-, Boden- und Aufstellflächen) ordentlich und sauber?	Ja/Nein	
2	Sind die Einkaufswagenboxen in einem gepflegten Zustand und frei von Schmutz?	Ja/Nein	
3	Wie beurteilen Sie den Gesamteindruck der Abteilung?	1 bis 5	
Departments: Lager und Warenanlieferung			
1	Ist die Anlieferungszone ordentlich und frei von Hindernissen?	Ja/Nein	
2	Befinden sich ungenutzte Einkaufswagen im Lager	Ja/Nein	
Departments: Sortiment gesamt			
1	Sind die Aktionsflächen aktuell, attraktiv gestaltet und dem Verkaufsmöbel entsprechend bestückt?	Ja/Nein	

Complete

Progress bar: 1 of 20 steps completed (indicated by a large orange dot).

The final panel is to preview your checklist.






When you are satisfied with the composition of the checklist, hit “**Complete.**”




Checklist Management

x2 solutions USA

Click to search

	From	To	Recurrently	Associated departments	Signature required	complete configuration	Allow selection of department	
Store Check 1			N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Indgang			N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Skjete			N/A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Performance Audit (short)			N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
ung			N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

To edit an existing list, simply click the  icon to return to the Checklist Wizard.


Home Insert Draw Page Layout Formulas Data Review View


Paste Cut Copy Format

Calibri (Body) 11

Wrap Text Merge & Center

	A	B	C	D	E	F	G
1		Number	Questions	Question Type	More Info	File	
2			Departments: Butcher				
3		1	How would you rate the presentation of the meat products in the display (appearance, perceived quality, cleanliness of display) on a scale 1-5, 1 being the best. Please provide a picture and reason for rating	1 to 5	Unchecked	Unchecked	
4		2	Please take 2 minutes and observe the interaction of the team members with customers. How would you rate their customer service (attention, friendliness, responsiveness) using a scale from 1-5, 1 being the best. Please note reason for rating.	1 to 5	Unchecked	Unchecked	
5			Departments: Check Out				
6		1	Are there lines in front of the cashier check outs? If yes, please note the number of cashiers open and if all self service check outs are available .	Yes/No	Checked	Unchecked	
7		2	Are all self service check outs in service, clean and stocked with shopping bags?	Yes/No	Unchecked	Unchecked	
8		3	Is there a team member at the self service check-out?	Yes/No	Unchecked	Unchecked	
9			Departments: Frozen Foods				
10		1	Are all frozen products on sale available and well stocked?	Yes/No	Checked	Unchecked	
11		2	Do all freezer section doors close tightly?	Yes/No	Unchecked	Unchecked	
		3	Please pick a freezer section and note the temperature shown at the sensor (please note the freezer ID) If the freezer temperature is >41 degrees F notify management	Temperature	Checked	Checked	

To delete a list, simply click the  icon.

To export checklists to an Excel Spreadsheet, e.g. to review layout and content, click the  button.

Creating Checklists

