MCL Checklist Wizard – FAQ Guide

How do I access the Checklist Wizard in MCL?

To access the Checklist Wizard, open the **Checklists** tab from the main menu.

- View, create, or manage existing checklists directly from this section.

How do I create a new checklist in MCL?

Click the **+** icon in the Checklist Wizard.

- Enter a checklist name and complete all mandatory fields.
- Set start and end dates, or choose a recurrence option (Daily, Weekly, etc.).
- Select **N/A** if the checklist should always be available.
- Review details, then click **Save** to confirm.

What fields are mandatory when creating a checklist?

Mandatory fields typically include:

- Checklist name
- Start and end dates (if applicable)
- Department or role associations

How can I make a checklist always available?

Select **N/A** for start and end dates to keep the checklist active at all times.

How do I configure checklist recurrence or periodicity?

When setting up your checklist:

- Choose a recurrence option under **Scheduling** (Daily, Weekly, or Custom).
- Confirm that each recurrence period aligns with business needs.

How can I restrict or allow department selection for checklists?

In the configuration settings:

- Enable or disable departments depending on where the checklist should appear.
- Only departments you select will see the checklist in the MCL App.

Which roles can access my checklist, and how do I assign them?

During checklist setup, assign access under **Roles**.

- Available roles: **Author**, **Administrator**, and **Manager**.
- Only selected roles can see and interact with the checklist.

How do department selections affect which stores see the checklist?

Department selections determine checklist visibility across stores.

- Each department links to specific stores in your MCL system.
- If a department is not selected, its linked stores will not see the checklist.

How do I select and organize questions within a checklist?

In the **Question Selection** screen:

- Choose questions by department.
- Use the up/down arrows to reorder them.
- Department order can also be adjusted later in the mobile app.

How can I send completed checklist reports to specific emails or roles?

Use the **Email Configuration** tab to set up recipients.

- Enter email addresses or link reports to roles such as **Regional Manager**.
- This integrates with your company-wide or user-level email settings.

How do I preview a checklist before completing it?

Click **Preview** to review the checklist layout.

- Once satisfied, select **Complete** to finalize and activate it.

How do I edit, delete, or export an existing checklist?

Use the icons beside your checklist name:

- ✏️**Edit** – modify an existing checklist
- 🗑️**Delete** – remove it
- 🚬**Export** – download it as an Excel file for offline use

What happens if I leave a department or role unselected?

If a department or role is left unselected, users in those categories will not see or access the checklist in the MCL App.
