Building a checklist template

Creating the checklist behind a visit, a self-assessment, an opening checklist or a financial review — sections, items, answer types, points and critical items.

Every check in Compliance comes from a **checklist template**. You build it once, then schedule it or use it ad hoc whenever you need it.

Go to **Compliance Settings**, then **Checklist templates**, and press **Create**.

The settings on the left

Field	What it does
Checklist name	What it is called everywhere else — "Brand standards visit", "Opening checklist".
Kind	Visit, Self-assessment, Checklist or Financial review. This decides who completes it and which page it lists under.
Visit type	Visits only. Your own label — Audit, Business Review, Inspection, Coaching Visit.
About	Whether the check is about a tribe or about a franchisee across their tribes.
Pass threshold %	Visits and self-assessments only — the score needed to pass. The field is hidden for Checklist and Financial review, which are not scored out of a hundred.
Status	Only Active templates can be scheduled or started. New ones begin as Draft.
Ask the franchisee to sign off	Visits only. When it is on, a completed visit report shows a sign-off card on the tribe's Compliance page and sits in the tribe's To do until somebody at the tribe signs it. An advisor can still record a sign-off from head office whichever way the switch is set.
Show the score to the franchisee	On by default. Switch it off and the tribe still sees every item and whether the check passed, but not the number or the points.
Financial	Hides the template and everything filed against it from anyone without View Financial Compliance.

Sections

Sections group a long check so the person conducting it works through one screen at a time — Exterior, Front of house, Food safety, Marketing. A short checklist does not need any; leave them out and the items appear as one list.

Items

Press **Add item** and give it a name. The item expands to show everything you can set against it.

Answer type	Use it for

Pass / Fail / N/A	The workhorse. Earns its points on Pass, nothing on Fail, and leaves the total alone on N/A.
Score out of points	A judgement out of the points you set — 7 out of 10 for presentation.
Yes / no	A simple switch that still scores.
Rating	Stars, scored proportionally.
Photo, Signature, File upload	The answer is the file itself.
Short answer, Paragraph, Number, Date	Free text and figures. Not scored.
Choose one, Choose many	A list of options you define.

N/A IS NOT A FAIL
Answering N/A removes the item from the total rather than scoring zero, so a kiosk with no kitchen is not punished for the food safety section. That is what makes one template work across formats.

Points, required and critical

- **Points** weight the item. Ten points for signage and thirty for food safety means the score reflects what matters.
- **Required** means the check cannot be submitted until the item is answered.
- **Critical** means a fail fails the whole check regardless of the percentage. Use it for the handful of standards that are not negotiable.
- **What a pass looks like** is shown to whoever conducts the check, right under the item. It is the cheapest way to make two advisors score the same thing the same way.

RENAMING AN ITEM IS SAFE, DELETING ONE IS NOT
Answers are filed against an item when it is created, so you can reword an item freely and past answers still line up. Deleting an item removes it from future checks only — completed checks keep their own copy and are not altered.

Raising a corrective action from a fail

Turn on **A fail raises a corrective action** against an item and give it an action title, a number of days to fix it and a severity. When that item is failed, the action is raised against the tribe automatically as the check is submitted.

This is the single most useful switch in the module. It is the difference between a report nobody reads and a task somebody owns.

Editing a template later

Every check takes its own copy of the checklist the moment it is created. So editing a template never changes a check that has already been booked, is under way, or is finished — a report you open a year later shows the questions that were actually asked. The flip side is that a change you make this morning does not

reach the checklists last night's schedule already created, even though nobody has opened them: it applies from the next ones created.

That also means a template can be archived without stranding anything. Archive it rather than deleting it once a check is no longer run.