Putting a check on a schedule

Making visits, self-assessments, opening checklists and document deadlines appear on their own, for the tribes you choose, without anyone remembering to create them.

A **schedule** turns a checklist template or a document type into a standing obligation. Quarterly visits for every tribe, a daily opening checklist, an annual business review with each franchisee, insurance renewed every twelve months.

They live under **Compliance Settings**, in the **Schedules** card. Records for the current period are created every night.

Setting one up

Field	What it does
Name	What the schedule is called in the settings list.
A checklist / A document	Whether it schedules a checklist template or a document type.
Every	Daily, Weekly, Monthly, Quarterly, Half-yearly, Yearly or Once.
Due days into the period	How long the tribe has. Thirty on a quarterly visit means due by the end of the first month.
Grace days	How long after the due date before it counts as overdue.
Shifts	Daily schedules only — one record per shift per day, such as Open and Close.
Every active tribe	On by default. Turn it off to pick specific tribes, or specific franchisees.
Starts and Ends	Optional window. Nothing is created outside it.

Choosing who it applies to

Leaving **Every active tribe** on is the common case, and it picks up new tribes automatically as they open. Turn it off and you can name particular tribes, or particular franchisees when the check is about the owner.

> **AN AUDIENCE WITH NOBODY IN IT CREATES NOTHING**
> If you turn off Every active tribe and then do not choose any tribes, the schedule is valid but applies to no one, and nothing will ever appear. Choose at least one, or turn the switch back on.

Document schedules work differently

A schedule on a document type does not create anything to fill in, and it does not send reminders either. What makes a missing document show as missing on the Overview, on the tribe profile and in the tribe's own To do is the **Required** flag on the document type itself, not a schedule.

Generate now

A schedule built on a checklist template has a **Generate now** button in its Manage column — the play icon, which names itself when you hover over it. It creates the current period straight away rather than waiting for the overnight run. Use it when you have just set a schedule up and want to see it work. Document schedules have no such button, because they create nothing.

> **PRESSING IT TWICE IS SAFE**
> Generating is worked out per tribe, per period, per shift, so pressing the button again creates nothing and reports zero. It cannot produce a second copy of Tuesday's opening checklist.

Pausing and stopping

- Set the status to **Paused** to stop new records appearing while keeping the schedule.
- Set an **Ends** date for a check that runs for a season.
- Deleting a schedule keeps every record it has already created. Only future ones stop.