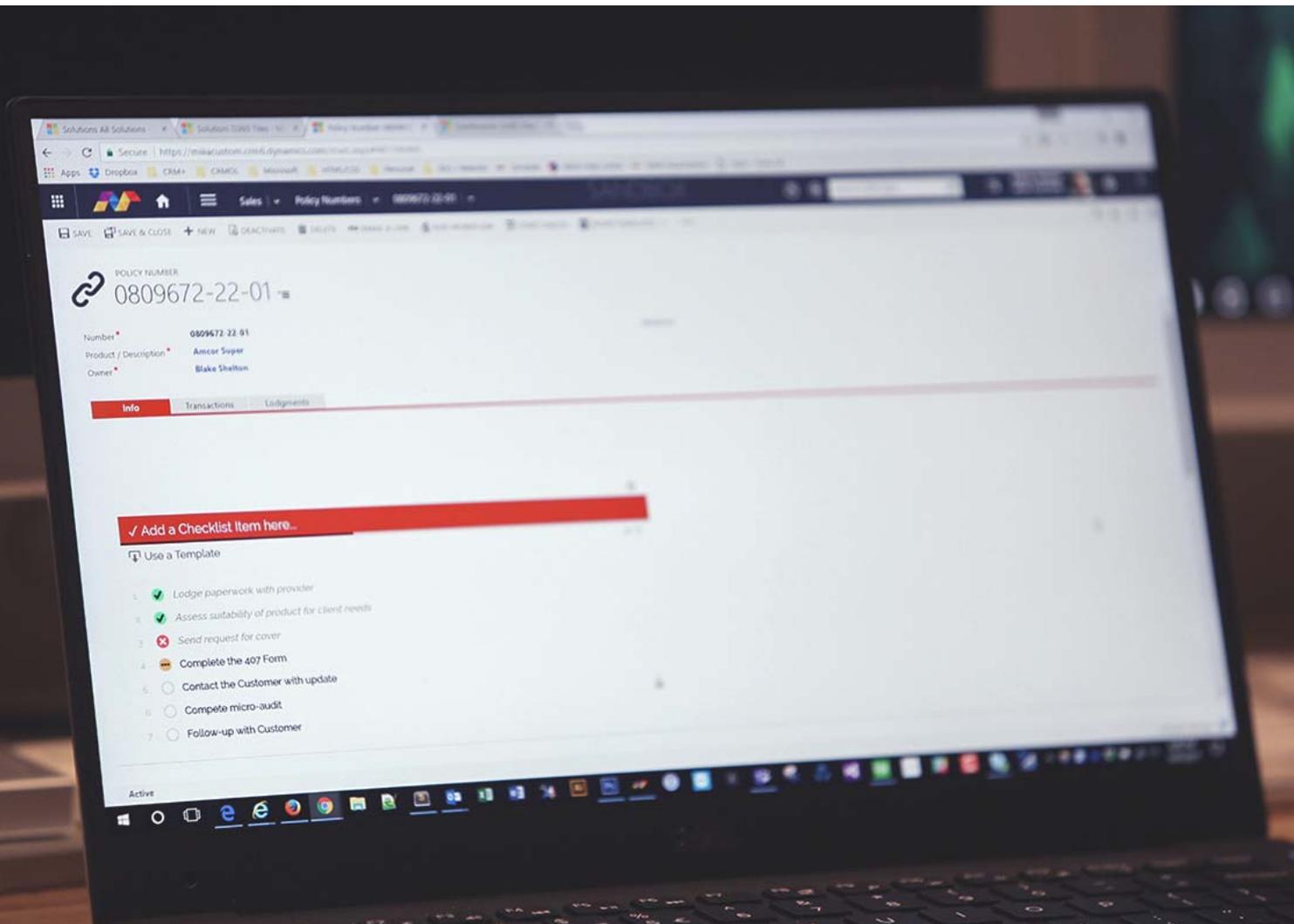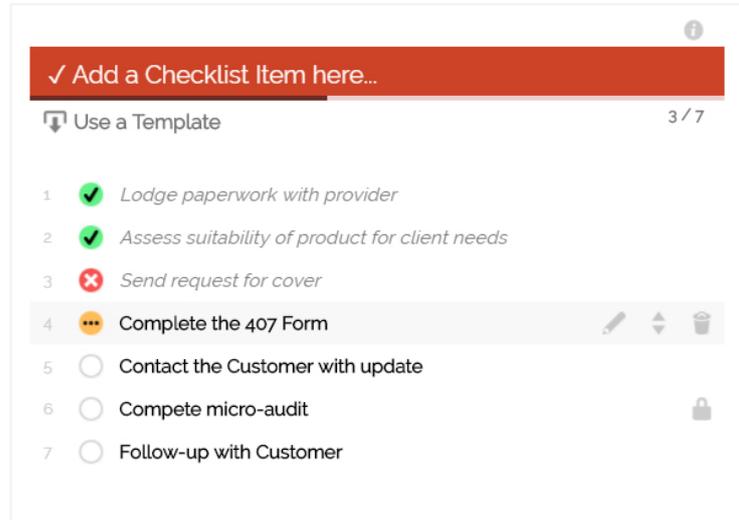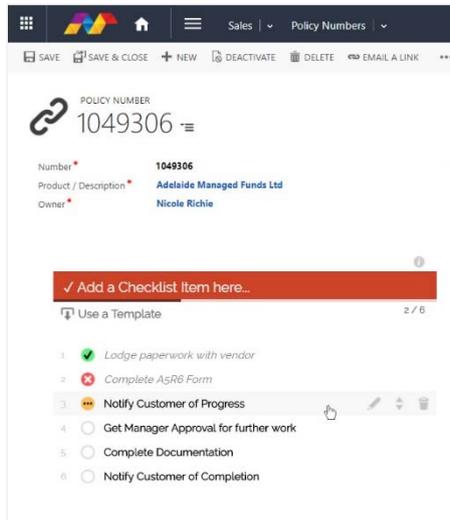# D365 Checklists Test Drive

The ultimate to-do lists & checklists for Microsoft Dynamics 365

*Enhance the usefulness of Dynamics 365 records with multi-function **D365 Checklists**. Make life simple again with this easy add-on.*
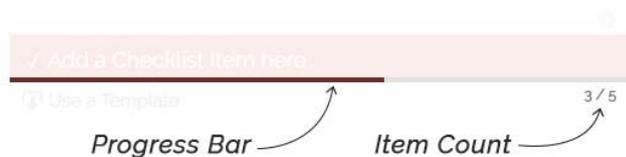
What are **Checklists** and how do they work?

- **Checklists** are a collection of to-do items or steps in a process
- Users can manage checklist items on the fly, or use templated lists
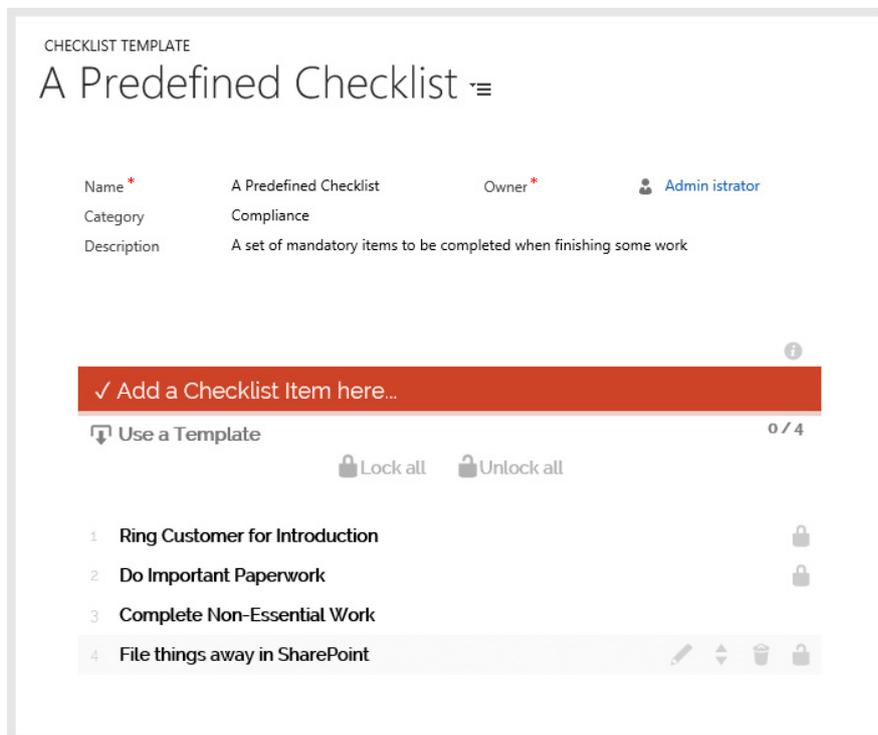
Some features of the **Checklists** add-on:

- Add **Checklists** to Dynamics 365 records (System or Custom entities)
- **Checklists** behave like normal Dynamics 365 form elements. Edits make the form "dirty" immediately, using Save, Save & Close or Mark Complete commits changes.
- Status values available for items: (click to cycle through)
  ○ **Blank** *(not started)* ✔ **Tick** *(completed)* ❌ **Cross** *(cancelled)* ••• **Partial** *(in progress)*
- ✎ **Edit** existing items or ↺ **Reset** already completed items to start fresh
- ↕ **Sort** items with a simple drag-n-drop
- 🗑 **Delete** existing items
- The User's name and date/time is recorded when an item is modified
- List progress is displayed, and when completed are visually represented

You can setup pre-configured **Checklist Templates** that users can start with on demand. This is particularly helpful for repetitive processes.

- Create a new **Checklist Template** called "**My Repeating List**"
- Add your checklist items, ✏ **Edit**, ⇕ **Resort** or 🗑 **Delete** as required
- 🔒 **Lock** items that you want to be enforced/mandatory for end-users
  (This means users can tick/cross them, but not edit or delete them)
- When done just Save & Close
- On any Checklist now users can click ⬇ **Use Template**
- Select the "**My Repeating List**" template
- The templated items are merged into their Checklist!

CHECKLIST TEMPLATE

A Predefined Checklist ▾≡

Name *	A Predefined Checklist	Owner *	👤 Admin istrator
Category	Compliance		
Description	A set of mandatory items to be completed when finishing some work		

ⓘ

✓ Add a Checklist Item here…

⬇ Use a Template   0 / 4

🔒 Lock all   🔒 Unlock all

1 Ring Customer for Introduction   🔒
2 Do Important Paperwork   🔒
3 Complete Non-Essential Work
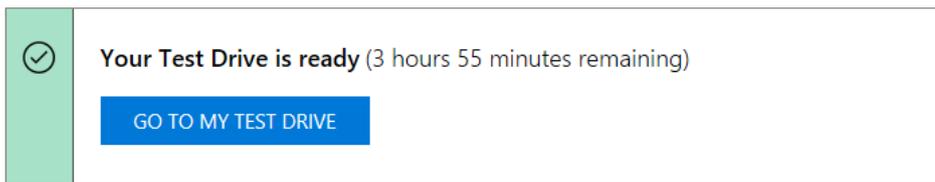4 File things away in SharePoint   ✏ ⇕ 🗑 🔒

You can also deliver **Checklist Templates** in Dynamics 365 **Workflows**. This can help if you wish to automate record creation/delivery along with a pre-configured checklist.

- Create a new **Workflow** to create a Task record
- Add the **Add Checklist Template** custom step
- Edit the custom step and define the "**My Repeating List**" template
- Save & Publish the **Workflow**
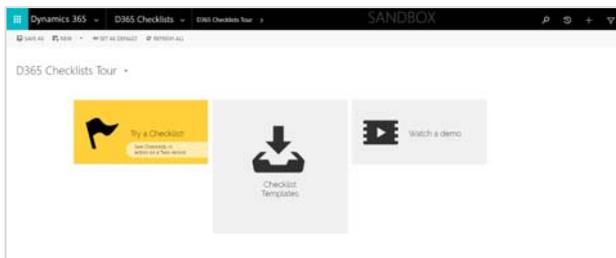- When executed a new Task is created with your **Checklist Template** already inside!

How does this Test Drive work?

Thanks for trying a Test Drive of **D365 Checklists**! We have created a quick and easy demonstration of the key features for you, that will hopefully allow you to imagine what the add-on can do in your own organization.
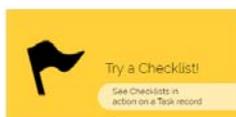
- Once your access has been granted, click **GO TO MY TEST DRIVE**
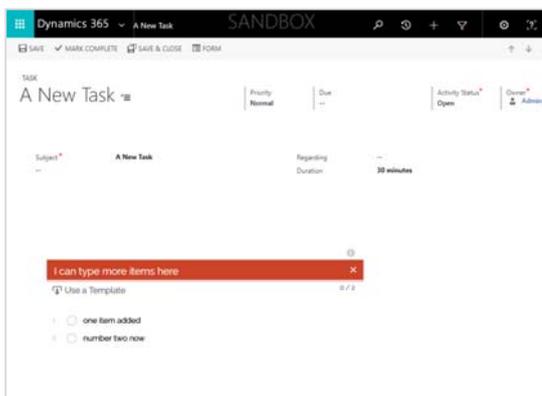

- Sign-in with your Microsoft credentials
- You will start on the D365 Checklists Tour dashboard
  ** *This dashboard is powered by one of our other add-ons D365 Tiles*
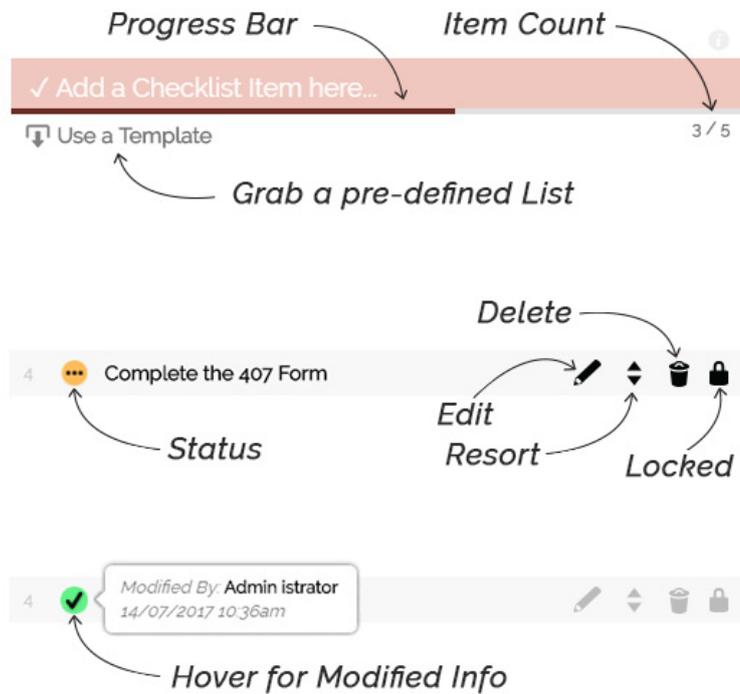

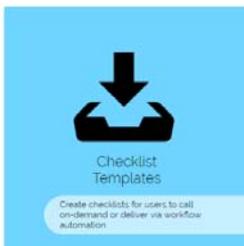- You can jump straight in and click the "Try A Checklist!" button

- This will create a new Task for you where we have placed the Checklist control
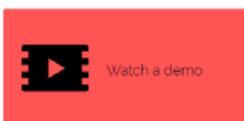
- Feel free to add items, edit, resort and delete items to get a feel for things

- From the main dashboard you can also create/edit Checklist Templates to find out how you can pre-define lists

- For more info check out the handy videos we've linked to on the dashboard

We hope you enjoy your D365 Checklists Test Drive!

For more info please visit https://miiia.com.au/add-ons and contact us.