Managing task checklist

You can define Task Checklists under each customer in order to keep track of actions done by the task users. When you create a task, you can enable a checklist. In Smart Review, the **Checklist** panel shows the checklist items, and the task users can select or clear the items before setting the status to indicate what has been done.

Requirements: You must have a customer role at the customer level that includes the Modify Customer user right.

1. Select a customer and select **Customer > Manage Checklists**.
2. In the **Checklists** area, in the **Name** box, type a name for your checklist.
3. (Optional) select the **Required** check box, if you want the users to complete all the items in the checklist before they can set status of the task.
4. Click **Add**.
   Your checklist appears in the **Checklists** box.
5. To add an item to your checklist, in the **Items** area, in the **Name** box, type a name for your checklist item and click **Add**.
6. Click **Save**.
7. To add more checklists and items, repeat steps 1-5.