Checklists quick start guide

1 Create a checklist

A step-by-step guide to setting up the Wosson checklist feature for your vehicles and drivers.

1 Open Checklists

Click **Checklist** near the bottom of the black sidebar menu.

2 Add a checklist

Click the green **Add Checklist** button at the top right.

3 Give it a name

For example, **Daily Vehicle Check** or **Walkaround Check**.

4 Choose the checklist type

Vehicle: can be scheduled and generates overdue alerts.
Informational: for occasional checks where overdue alerts are not required.

5 Add your first question

Enter the question. Choose whether the **question**, a **photo** or a **comment** is optional or mandatory.

6 Add more questions

Click **Add New** and repeat the process. To rearrange questions, use the ellipsis (**...**) next to each one.

Wosson top tip

Arrange questions to follow the driver's natural route around the vehicle. Start at the front, complete a full 360-degree walkaround and finish at the driver's seat. A useful final question is to request a photo of the instrument cluster with the engine running.

7 Save your checklist

When you are happy with the questions, click **Save** at the top right. Your first checklist is complete.

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2 Set up vehicle groups

Group similar vehicle types and set checklist schedules, such as daily, weekly or monthly.

1 Open Assets

Click **Assets**, the second button down in the black sidebar.

2 Open Asset Groups

Select the **Asset Groups** tab, the second tab at the top.

3 Add a group

Click the green **Add Asset Group** button at the top right.

4 Name your group

For example: **Vans**, **Cars**, **Rigids** or **Artics**.

5 Set the overdue interval

Set the maximum number of days before a checklist becomes overdue. For example: **1 day**, **7 days** or **30 days**.

6 Save the group

Click **Save**.

Assign vehicles to a group

Click a vehicle, select the required group from the dropdown menu and click the green **Save** button. Repeat for the other vehicles in the group.

Simple setup: If you do not need multiple checklists or overdue alerts, you can skip vehicle groups and go straight to inviting drivers.

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3 Invite drivers

Create a user account for each driver and send their invitation.

1 Open Users

Click **Users** in the black sidebar menu.

2 Add a user

Click the green **Add User** button at the top right.

3 Enter the driver's details

Enter the driver's **name** and **email address**.

4 Set permissions

Select **Driver** from the permissions dropdown. If you want drivers to have tracking access, contact us so we can update the Driver permission.

5 Save the account

Click **Save**.

6 Send the invitation

Open the ellipsis menu (**...**) next to the driver and select **Send Invitation**. The driver will receive an email with login instructions.

Lost or forgotten login details

The driver's **username is their email address**. Drivers create their own password. If they need help accessing their account, ask the driver to click **Forgot Password** on the login page and enter their email address. Then follow the instructions to reset their password.

Password privacy: Wosson staff cannot access or share passwords. Use the password reset link or resend the invitation to help the driver regain access to the Wosson Telematics platform.