FAQ: what it does, what it does not, and how it behaves

Straight answers: what the app is and is not, where the data lives, what it will not do that a construction platform does, and why an add-on polls, waits and saves the way it does.

Short answers to the questions people ask before they install, and the ones they ask in the first week. Facts, not marketing. If something here is wrong, it is a bug — tell us.

Part 1 — What it does, and what it does not do

What is Project Checklist, in one line?

A project view over ServiceM8 jobs. It turns a job's checklist into lists of tasks with statuses, dates, estimates, people, materials and files, and shows them as a Board, a Timeline, a Calendar, a Table and — for a project with child jobs — a Map. The work stays in ServiceM8.

Is it a construction management platform?

No. It is a planning and tracking layer for jobs that already live in ServiceM8.

Dedicated construction platforms carry a head contract, progress claims, variations, RFIs, a defects register, drawing revisions and markup, takeoffs and estimating, tendering, retention and subcontractor portals. Project Checklist has none of those, and is not trying to. If your work needs them, you need one of those platforms. ServiceM8 and Project Checklist can still run the service side of the same business.

So who is it for?

A trade or service business on ServiceM8 whose jobs sometimes run for weeks — a solar install, a fit-out, a renovation stage, a maintenance programme — and needs to see

what comes next, who has it, when it lands and what it is costing, without leaving ServiceM8 or buying a second system.

Where does my data live?

- **Tasks** are ServiceM8 job checklist items. You can see them in the ServiceM8 job card, the Dispatch Board and the app.
- **Notes and time entries** are ServiceM8 notes on the job.
- **Files** are ServiceM8 attachments on the job.
- **The board's own planning data** — statuses, dates, estimates, materials on a task, list order and colours — sits in a small per-job store that ServiceM8 provides to the add-on.

Nothing is copied to a third-party server.

What happens if I uninstall it?

Your tasks, notes, time entries and files stay in ServiceM8 exactly as they are; they were always ServiceM8 records. The board's planning data stays in the add-on's store but is not visible without the add-on. Nothing is deleted.

Does it schedule work for me?

Partly. Give a task a duration and say what it waits on, and the Timeline works out the dates. When you move one task, the app *proposes* moving the tasks that depend on it, forward or back, and shows you the list before anything changes. It never moves dates on its own, and it does not level resources or pick who does what.

Is the "Longest chain" a critical path?

No, and we do not call it one. It highlights the run of dependent tasks whose durations add up to the most working days. There is no float, no slack, no backward pass and no baseline. That is a deliberate limit.

Can it track money?

Some. A task can carry material lines and bundles from your ServiceM8 catalogue, with an estimated quantity and price, and you can bill them to the job from the task. Tracked time can be billed as labour. The Financial Summary compares estimated materials and labour against what is billed on the job and flags overruns.

There are no budgets, cost codes, purchase orders, progress claims or profit-and-loss.

Can one project span several jobs?

Yes. Mark a job as a project, then create or attach child jobs. The parent's board shows every child's lists beside its own, on every view; a task moved on the parent is written to the job it belongs to. Each job keeps its own invoice, its own diary and its own storage.

Can two people work on the same board?

Yes. Each person's changes are saved as they happen and merged task by task. Within about 30 seconds a colleague's changes appear on your board with a notice saying who made them. If you both edit the *same* task in the same half-minute, the later save wins for that task.

Can I limit what some staff see?

Yes, per person, in Settings: a board can be full, read-only or hidden; financial figures can be hidden; files marked Restricted can be hidden.

These are in-app controls, not security. Anyone with ServiceM8 access to the job can still open the job card, where ServiceM8 shows every task and attachment.

Is there an AI assistant?

Optional. Switch it on in Settings and supply your own API key from a provider you choose. It reads the board and can make changes only after you approve each one. It is off by default, the key never reaches a browser, and use is at your own risk and cost.

Part 2 — How it behaves, and why

Why does a colleague's change take up to 30 seconds to show?

ServiceM8's own screens get pushed updates. An add-on cannot; it has to ask. Project Checklist asks every 30 seconds, with one request, and only while the tab is visible and you have touched it in the last 3 minutes. Press the refresh button to ask now.

Why is it slower than ServiceM8's own job card?

Two reasons.

Everything the board shows is fetched through the ServiceM8 API, one request at a time, and ServiceM8 allows an app about 180 requests a minute — the add-on keeps itself under that on purpose.

And a board is not one record. Opening it reads the tasks, the board's store and the job's notes. A plain job opens in a second or two. A parent with several child jobs reads each child in turn and holds the splash screen until they are in.

What is "ServiceM8 asked us to slow down"?

The request limit was reached — usually a burst of edits on a large project, or several boards open at once. The board waits the time ServiceM8 asks for, shows a countdown, then carries on. Nothing is lost; unsaved changes go out when the wait ends.

What do "Saving…", "Saved" and "Retry" in the header mean?

Every change is saved in the background a moment after you make it, and the pill says where that stands. Moving a task can take several requests (one per task whose order changed), so "Saving order… 3 of 8" is normal. "Retry" appears only when a save failed; press it and the same move is sent again.

Close the tab while it says "Saving…" and that last change may not land.

Is there a limit on how much a job can hold?

Yes: each job's board store is 64 KB, set by ServiceM8. In practice that is 120 to 350 tasks over a job's life, depending on how much each task carries — see Limits. The board warns in Needs attention at 250 tasks or 80% of the store, and stops adding tasks at 300 per job. The answer is a child job: every job has its own 64 KB.

Why does the board stop updating when I leave it open?

To stay well under the request limit, the poll pauses after 3 minutes without a click or a keypress, and whenever the tab is hidden. It resumes on the next touch and catches up straight away.

Does it work offline?

No. Every read and write goes to ServiceM8. With no connection the board shows what it last loaded and saves fail with a message; they are not queued for later.

Why do I sometimes see a task move back, then forward again?

You should not any more. Two quick moves used to let a read from the server arrive between the two writes. A moved task is now pinned to its new place until the server confirms it. If you still see it, tell us which job.

Which ServiceM8 permissions does it ask for, and why so many?

It reads and writes jobs, checklists, notes, attachments, materials, bookings and staff records, because a task can carry each of those. When a new capability needs a new permission, ServiceM8 asks everyone on the account to accept the add-on again on next open — that is ServiceM8's rule, not a fault.