PROJECT CHECKLIST GUIDES · 1 OF 4

Is this a job, or is it a project?

Most work in ServiceM8 is a job and should stay that way. Here's how to spot the work that needs more than a job can hold.

ServiceM8 is built around jobs. You quote a job, schedule it, do it, invoice it. For most of the work most service businesses do, that's exactly right, and nothing here is asking you to change it.

But some work doesn't sit comfortably inside a single job. If you've ever finished a week and couldn't say off the top of your head where a particular job was up to, you've met it.

The quickest way to tell

Are you tracking it somewhere else?

A spreadsheet. A notebook in the ute. A whiteboard in the office. A Trello board someone set up once. A group chat where the real story lives.

If a job has quietly grown a second home outside ServiceM8, that job is asking to be a project. That second list exists because the job has more moving parts than the job card can hold, and someone needed somewhere to put them.

That's the tell, and it's usually enough on its own.

Three signals

If you want to be more deliberate about it, look for these.

- **It takes more than one visit.** You'll be back, maybe several times, and something has to happen between the visits.
- **More than one person touches it.** Different trades, different days, and someone needs to know who's doing what and whether the last bloke finished.

- **You can't hold it in your head.** There are enough steps that you're writing them down, or worse, meaning to.

One of these on its own might not be much. Two or three together, and you've got a project.

What that looks like in practice

These are usually projects:

- A bathroom or kitchen renovation — several trades, a fixed sequence, a date the customer is counting on
- A solar install — site assessment, approval, install, inspection, grid connection, spread over weeks and often several visits
- A switchboard upgrade and partial rewire — staged work, an outage window, follow-up
- Any fitout with a handover date and a defect list at the end

These are usually not:

- A blocked drain, a dead hot water unit, a fault callout — one visit, one person, done
- A routine service or scheduled maintenance visit
- Anything you'd finish and invoice the same day

The line isn't the dollar value. It's whether the work has parts that need tracking separately.

THE WORK	MORE THAN ONE VISIT	MORE THAN ONE PERSON	CAN'T HOLD IT IN YOUR HEAD	SO IT'S A...
Bathroom or kitchen renovation	✓	✓	✓	Project
Solar install	✓	✓	✓	Project
Switchboard upgrade and partial rewire	✓	✓	✓	Project
Fitout with a handover date and a defect list	✓	✓	✓	Project
Blocked drain, dead hot water unit, fault callout	–	–	–	Job
Routine service or scheduled maintenance visit	–	–	–	Job
Anything you'd finish and invoice the same day	–	–	–	Job

The three signals against the examples. Two or three together and it's a project; none, and it's a job.

What happens when you mark a job as a project

This is the part worth understanding, because it's simpler than people expect.

Open the job in Project Checklist and click the **board icon** next to the job name in the header. Grey means it's an ordinary job; blue Project means it's a project. That's it.

You can also do it from the **Project Summary** — the dashboard listing all your projects — using **Mark as project** on any job in the list.

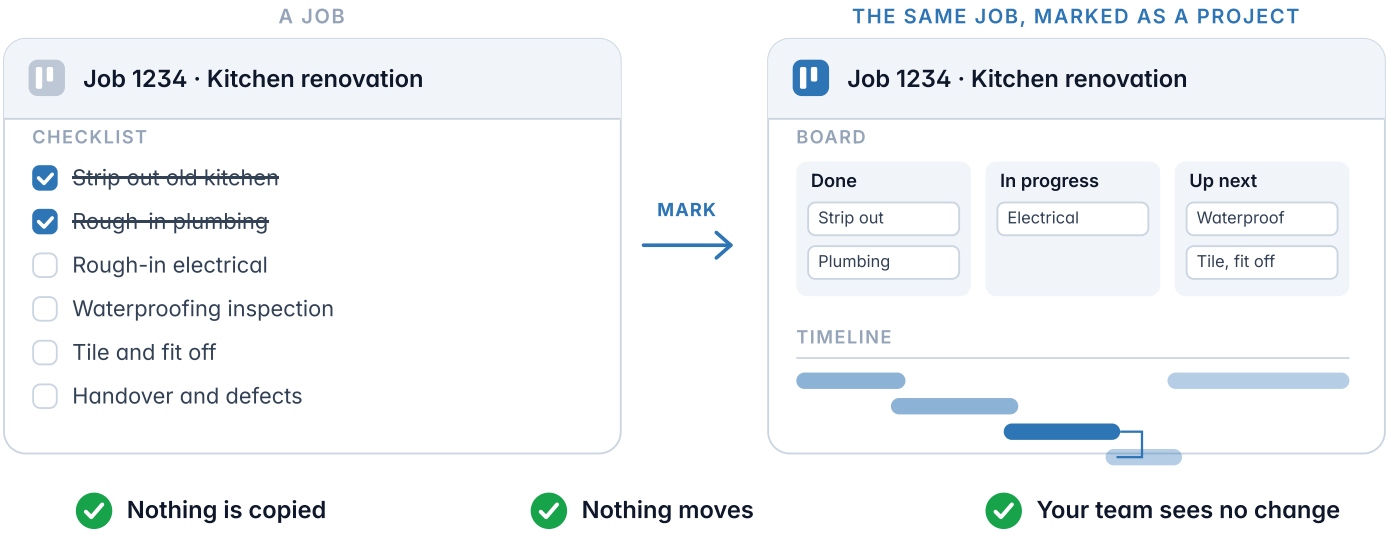
Here's what it does:

- The checklists already on that job become **lists**, and the items on them become **tasks**.
- You get new ways to look at them — the **Board** and the **Timeline** among them.
- The job appears on the **Project Summary** alongside your other projects.

And here's what it doesn't do:

- **Nothing is copied.** No second version of the work is created anywhere.
- **Nothing moves.** The job stays exactly where it is in ServiceM8.
- **Your team sees no change.** A tech opening that job in the ServiceM8 app sees the same checklist they always did. When they tick something off, it ticks off on your Board, because it's the same record. There's no syncing, because there's nothing to sync.

That last point is the whole idea. Project Checklist doesn't build a separate project system beside ServiceM8. It gives you better ways to look at the checklists you already have.



One click on the board icon. The checklist items are the same records; the Board and the Timeline are new ways to look at them.

When the work is split across several jobs

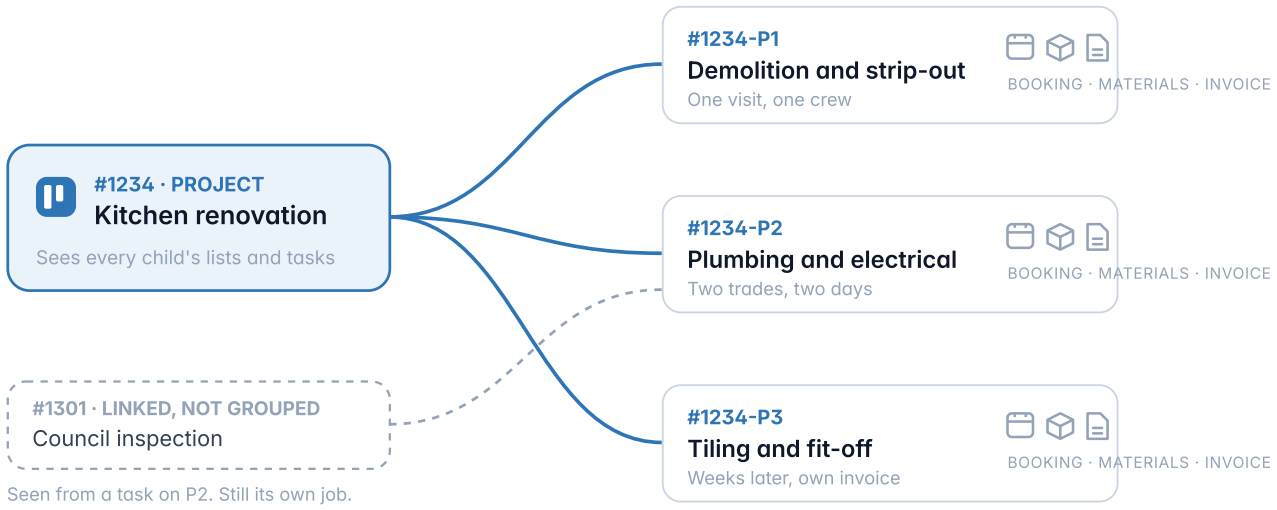
Plenty of project work is. A solar install gets quoted as one thing and then split, because the site assessment is one visit by one person, the install is two people for two days with a truck full of materials, and the grid connection happens weeks later. Each of those wants its own booking, its own materials, and often its own invoice.

That's not a problem to work around. That's just how the work is.

So a project can be more than one job. You pick the job you think of as the head of the work, mark it as a project, and then add the others underneath it as **child jobs**.

Each child stays a completely normal ServiceM8 job. Its own bookings. Its own staff. Its own materials and labour. Its own invoice. Nothing about it changes.

What you get is one place to see all of it. The parent project shows you the lists and tasks across every child job at once, so you can look at the whole install rather than four separate job cards.



One parent, as many children as it needs, one level deep. Each child is still an ordinary ServiceM8 job with its own booking, materials and invoice. A linked job is only looked at, never grouped.

Two ways to add one

From the project, open the three-dot menu ⋮ and choose **Child jobs...**

- **Create a new job** — same customer and address as the parent, and it's numbered off the parent so the relationship is obvious in ServiceM8. A parent numbered 1234 gets children numbered 1234-P1, 1234-P2 and so on.
- **Attach an existing job** — for work that's already been quoted or booked as its own job.

A job that's part of a project shows **Part of #1234**

in its header, with the number as a button that opens the parent. To take one out again, use **Remove from project**. The job goes back to being an ordinary job, and nothing is deleted.

One level, on purpose

A project is one parent with as many children as it needs. Children don't have children of their own.

That's a deliberate limit rather than something not built yet. Trade work has stages, not stages of stages, and a tree of jobs inside jobs would be harder to read than the four job cards you started with.

A lighter option: linking

If you only want to *see* another job from a task — not group it into the project — use **Link to job** on the task instead. That shows you the other job's current status and address without making it part of anything. Useful when a task depends on work someone else is handling.

Just try it

It's reversible. Click the board icon

again — or choose **Remove from projects** on the Project Summary — and you're back exactly where you started. Nothing is deleted, nothing is lost, because nothing was ever moved. If the project had child jobs, they go back to being ordinary jobs too.

So pick the job that's been living in a spreadsheet, mark it, and have a look. You'll know in a couple of minutes whether it belongs there.

One thing worth avoiding: don't mark everything. If every job is a project, the Project Summary stops telling you anything. Mark the handful of jobs that genuinely need watching, and leave the rest as jobs.