

# How Toggles Work in Streamline

In this article, you will learn about:

[What are Toggles?](#)

[Configuring the True Response](#)

[Configuring the False Response](#)

[Configuring Default Properties](#)

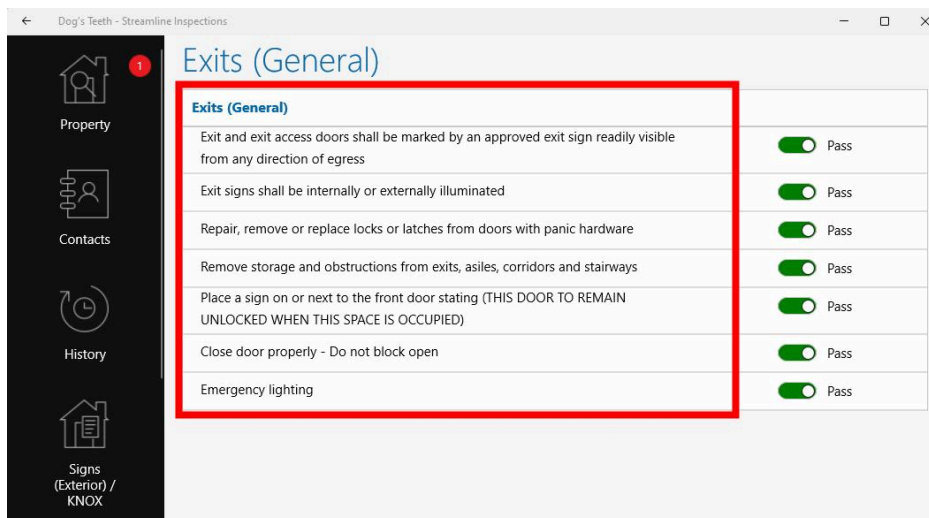
[A Very Important Note!!!](#)

[Adding a Violation to Appear on an Inspection Report](#)

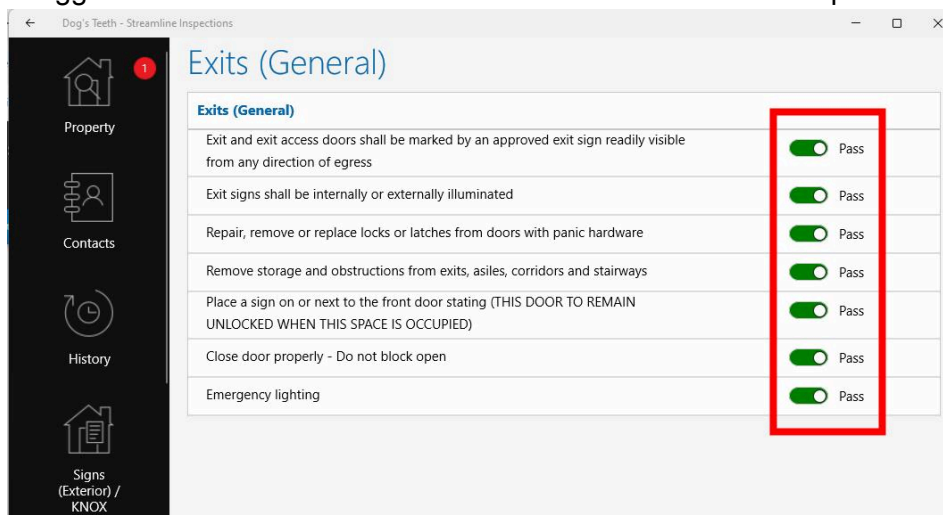
[Making a Violation a Self-Certification Violation](#)

## What are Toggles?

- The inspection questions the inspector sees on his tablet are constructed and configured inside a Checklist in Streamline Admin.



- A toggle is a control found in Checklists to create Streamline inspection questions.



- a. It allows the inspector to input a True/False, Pass/Fail, or Yes/No answer to the question.
  - b. The toggle also instructs Streamline to carry out a series of actions associated with the answer.
- When configuring a toggle, you will see the following controls.

The screenshot shows a configuration window for a toggle question. At the top, there are icons for edit, delete, and copy, followed by a 'Collapse' button with a downward arrow and a 'Toggle' label. Below this is a large text input field labeled 'Enter form text...'. Underneath the text field are two input boxes labeled 'Label True:' and 'Label False:'. To the right of these is a 'Default Properties' button. Further right is an 'Actions' section with two buttons: 'True' (with a green checkmark icon) and 'False' (with a green checkmark icon). At the bottom, there are four checkboxes: 'Include in Reports' (unchecked), 'Allow Not Applicable' (checked), 'Default to N/A' (checked), and an unchecked checkbox. Below the checkboxes is a small note: '\*\*\*Note when a question is marked as N/A on the mobile app, it overrides all actions and default properties for the question'. At the bottom right are 'Save' and 'Cancel' buttons.

- a. First, uncheck the “Default to N/A” box so that the question will be visible on the tablet.
  - b. Enter the text to appear on the inspection in the “Enter form text...” box. For example, if you want the inspector to answer the question, “Did a licensed electrician perform the work?” you would enter that wording in the ‘Enter form text . . .’ box.
  - c. Enter text in the Label True and Label False boxes to provide the answers to the question.
    - i. If you want the True answer to be “Yes,” enter it here. You can enter “Yes,” or “Pass” or “True” or any answer you choose in the Label True box. This is the answer that will appear on the question when the inspector performs the inspection.
    - ii. You can also enter any opposite answer in the Label False box.
  - d. If you want the question to appear on the inspection report, check the “Include in Reports” checkbox. Checking this box will allow the customer to see this question and the answer.

## Configuring the True Response

- **First, provide the settings for a “Yes” response.”**
  - a. Click the True Action button to set the behavior of a “True/Yes” response. By configuring the settings in True Actions, you are telling Streamline what actions you want it to perform when the inspector answers “True/Yes.”
  - b. Click the Properties tab at the top of the window.

Property	
Required	<input checked="" type="checkbox"/>
Show Notes	<input type="checkbox"/>
Show Photos	<input type="checkbox"/>
Require Notes	<input type="checkbox"/>
Require Photos	<input type="checkbox"/>
Passed	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>
Editable	<input checked="" type="checkbox"/>

Assign

- i. You will almost always want to check the “Editable” box. Editable means that the inspector is allowed to interact with the question and provide an answer.
- ii. You will also almost always want to check the “Passed” box on a “True/Yes” response. “Passed” means that the answer to the question is “True/Yes.” Checking the Passed box also tells Streamline not to issue a violation if a code violation is associated with the question.
- iii. You can control the question’s text color with the “Required” checkbox.
  1. If “Required” is checked in both “True Action” and “Default Properties” AND “Passed” is checked in True Action too, the text will appear **green** when the toggle is in the “True/Yes” position.
  2. To display the question’s text in **red**, check “Required” in both “True Action” and “Default Properties” and uncheck “Passed” in True Action. (As you will see later, the same procedure applies for False Properties settings.)

Electrical

Electrical	
Discontinue use of extension cords/unapproved multiplug devices in lieu of permanent wiring	<input checked="" type="checkbox"/> Pass
Maintain wiring in good condition in conformance with the Electrical Code and protect from damage	<input checked="" type="checkbox"/> Pass
Maintain a 36 inch clearance from all electrical panels and post identification sign(s)	<input checked="" type="checkbox"/> Pass
Replace electrical cover plate, socket or blank panel - see notes	<input checked="" type="checkbox"/> Pass
Has there been an electrical fire in the past?	<input checked="" type="checkbox"/> Yes
Did a licensed electrician perform the work?	<input checked="" type="checkbox"/> Yes

0 Violations > More Options > Need Inspector Signature Need Customer Signature Save & Stop Editing Complete Inspection

- iv. Require Notes & Require Photos

1. Checking “Require Notes” will require the inspector to enter a note on a “True/Yes” response.
2. Checking “Require Photos” will require the inspector to capture a photo.
3. A **red number** will appear in the tab on the left side of the screen corresponding to the section that contains a question that requires notes or requires photos. For instance, if a question in the Electrical section of the inspection requires notes or photos, a red number will appear next to the Electrical tab to indicate the number of actions that are required here. You will not be able to complete the inspection until these actions are complete.

Electrical

Discontinue use of extension cords/unapproved multiplug devices in lieu of permanent wiring	<input checked="" type="checkbox"/> Pass
Maintain wiring in good condition in conformance with the Electrical Code and protect from damage	<input checked="" type="checkbox"/> Pass
Maintain a 36 inch clearance from all electrical panels and post identification sign(s)	<input checked="" type="checkbox"/> Pass
Replace electrical cover plate, socket or blank panel - see notes	<input checked="" type="checkbox"/> Pass
Did a licensed electrician perform the work?	<input type="checkbox"/> No

☒ Notes Required ☒ Add Photos

0 Violations >

Need Inspector Signature Need Customer Signature Save & Stop Editing Complete Inspection

4. Generally, the “Require Notes” and “Require Photos” checkboxes are selected on a “Fail/No” response.
- v. Show Notes & Show Photos
1. “Show Notes” will show the note that the inspector entered on the tablet beneath the question.

Building Services and Systems

Portable unvented heaters are being properly used	<input checked="" type="checkbox"/> Yes
Heating appliances are not in Proximity to exits	<input checked="" type="checkbox"/> Yes
There is 36 inch of clearance in front of all electrical equipment	<input checked="" type="checkbox"/> Yes
Doors to electrical rooms are all labeled properly	<input checked="" type="checkbox"/> Yes
No multi-plug adapters being used	<input checked="" type="checkbox"/> Yes
There are No extension cords being used as permanent wiring	<input checked="" type="checkbox"/> Yes
All outlets/junction boxes are covered	<input checked="" type="checkbox"/> Yes
There are No open breaker slots inside any electrical panels	<input checked="" type="checkbox"/> Yes
This checklist was reviewed by the inspector (notes are required if not marked yes)	<input type="checkbox"/> No
All electrical appliances are listed for their use	<input checked="" type="checkbox"/> Yes

☒ Add Notes ☒ Add Photos

0 Violations >

Need Inspector Signature Need Customer Signature Save & Stop Editing Complete Inspection

2. "Show Photos" will show photos in the "Photos" link under the question.
- vi. Checking the "Email" checkbox will cause Streamline to send an email on a True/Yes response. An email will be sent to the address listed in the Email Templates tab under the Admin tab in the Admin portal.
- vii. Note: Most of the time, "Require Notes, Show Notes, Require Photos, Show Photos, and Email" are not used in the True Actions settings. They are often checked in "False Actions" settings because further actions are needed for a "No/Fail" response.
- c. The "Show" and "Hide" tabs can be used to show and hide additional questions based upon a true response.
  - i. Once you have created more questions in the current checklist, questions will appear in the Show and Hide tabs.
  - ii. If no additional questions appear, no additional questions exist in this checklist.
- d. Other Properties: This area allows the user to set the behavior for other questions on a "True/Yes" response. (I.e. If an additional question is set to "show" on a "Yes" response, the user can designate another question as "Required" or to "Require Notes," etc...).

True Response

On True, perform the following actions.


Show Hide Alert Properties **Other Properties**

These Fields

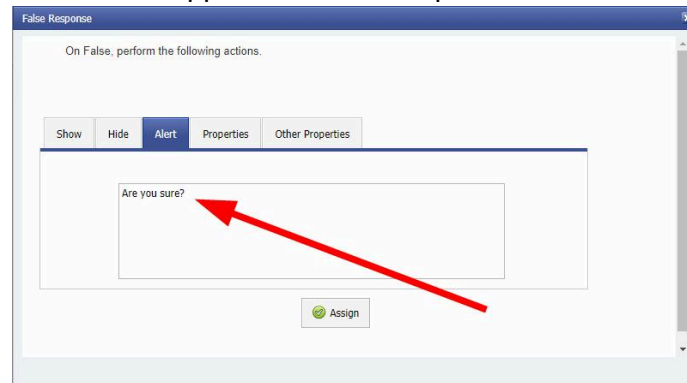
	Label	Group	Type
<input checked="" type="checkbox"/>	Discontinue use of extension cords/unapproved multiplug devices in lieu of permanent wiring		switch
<input type="checkbox"/>	Maintain wiring in good condition in conformance with the Electrical Code and protect from damage		switch
<input type="checkbox"/>	Maintain a 36 inch clearance from all electrical panels and post identification sign(s)		switch
<input type="checkbox"/>	Replace electrical cover plate, socket or blank panel - see notes		switch
<input type="checkbox"/>	Has there been an electrical fire in the past?		switch

Set These Properties

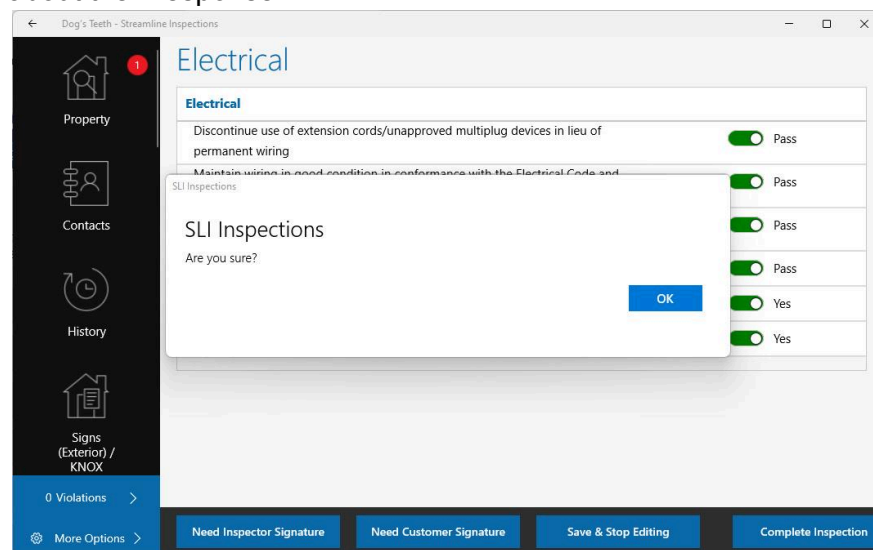
Property	
Required	<input checked="" type="checkbox"/>
Editable	<input type="checkbox"/>
Require Notes	<input checked="" type="checkbox"/>
Require Photos	<input type="checkbox"/>
Passed	<input type="checkbox"/>

 Assign

- e. Alert tab: Entering text in the Alert tab text box will trigger an alert message that will appear on the inspector's tablet when answering this question.
  - i. If text is entered in the Alert tab in True Actions properties, the alert will appear when the inspector answers "True/Yes."
  - ii. Conversely, if text is entered in the Alert tab in False Actions properties, the alert will appear when the inspector answers "False/No."



- iii. For instance, enter, "Are you sure?" to prompt the inspector to think twice about their response.



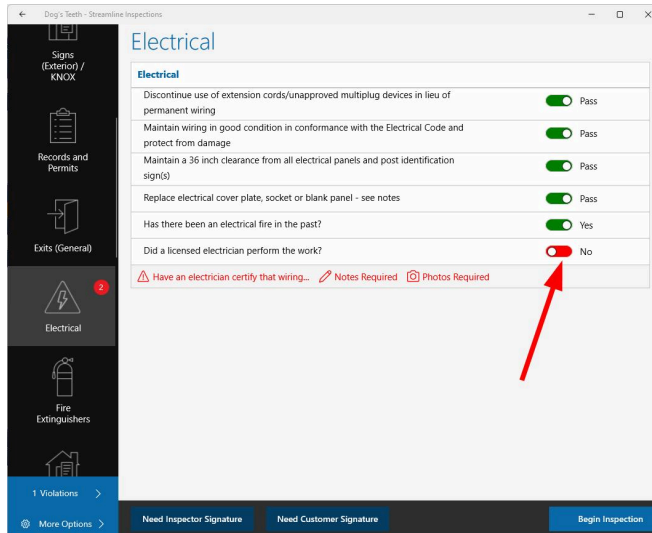
- f. Once you have entered all the necessary information in the "True Actions" settings, click "Assign" to save.

## Configuring the False Response

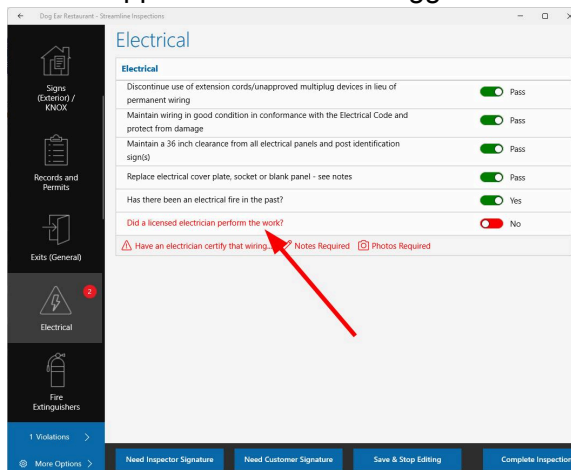
- **Second, provide the settings for a “No” response.”**
  - a. Click the “False Action” button to set the behavior of a “False/No” response. By configuring the settings in False Actions, you are telling Streamline what actions you want Streamline to perform when the inspector answers “False/No.”
  - b. You will notice that the pop up window for “False Actions” contains the same Controls as for “True Actions.”
  - c. Click the Properties tab at the top of the window.

Property	
Required	<input type="checkbox"/>
Show Notes	<input checked="" type="checkbox"/>
Show Photos	<input checked="" type="checkbox"/>
Require Notes	<input checked="" type="checkbox"/>
Require Photos	<input type="checkbox"/>
Passed	<input type="checkbox"/>
Email	<input type="checkbox"/>
Editable	<input checked="" type="checkbox"/>

- i. You will almost always want to check the “Editable” box. Editable means that the inspector is allowed to interact with the question and provide an answer.
- ii. For a “Fail/No” answer, you will also almost always want to uncheck the “Passed” box since a checked “Passed” box means that the answer to the question is “True/Yes.”
  1. Unchecking the “Passed” box also instructs Streamline to issue a violation on a “Fail/No” answer if a code violation is associated with the question. You will designate the violation later in Default Properties.
  2. Unchecking the “Passed” box will also change the color of the toggle to **red** on a “Fail/No” response.



- iii. You can control the question's text color with the “Required” checkbox.
  1. If “Required” is checked in both “False Action” and “Default Properties” AND “Passed” is unchecked in False Action too, the text will appear **red** when the toggle is in the “Fail/No” position.



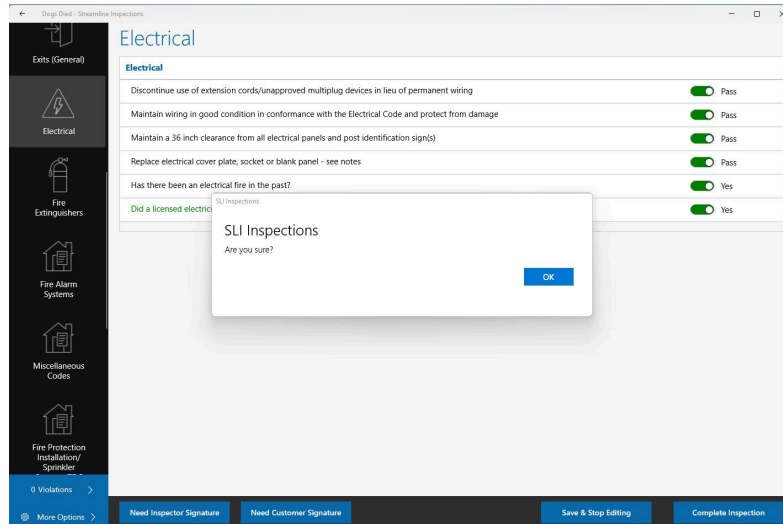
- 2. To display the question's text in **green**, check “Required” in both “True Action” and “Default Properties” and check “Passed” in False Action.
- iv. Require Notes & Require Photos
  1. “Require Notes” will require the inspector to enter a note on a True/Yes response.
  2. “Require Photos” will require the inspector to capture a photo.
  3. A **red** number will appear in the tab on the left side of the screen corresponding to the section that contains a question that requires notes or requires photos. For instance, if a question in the Electrical section of the inspection requires notes or photos, a red number will appear next to the Electrical tab to indicate the number of actions required in this section. You will not be able to complete the inspection until these actions are complete.
- v. Show Notes and Show Photos



1. “Show Notes” will show the note that the inspector entered on the tablet beneath the question.

The screenshot shows a software interface for 'Building Services and Systems'. On the left is a sidebar with icons for History, Compliance Engine, General Requirements, Exits - Means of Egress, Building Services and Systems (highlighted), and Photos. The main area displays a checklist of 12 items, each with a status toggle (Yes/No) and buttons for 'Add Notes' and 'Add Photos'. The 11th item, 'This checklist was reviewed by the inspector (notes are required if not marked yes)', is highlighted with a red box, and its 'Add Notes' button is also highlighted with a red box. The 12th item is 'All electrical appliances are listed for their use'.

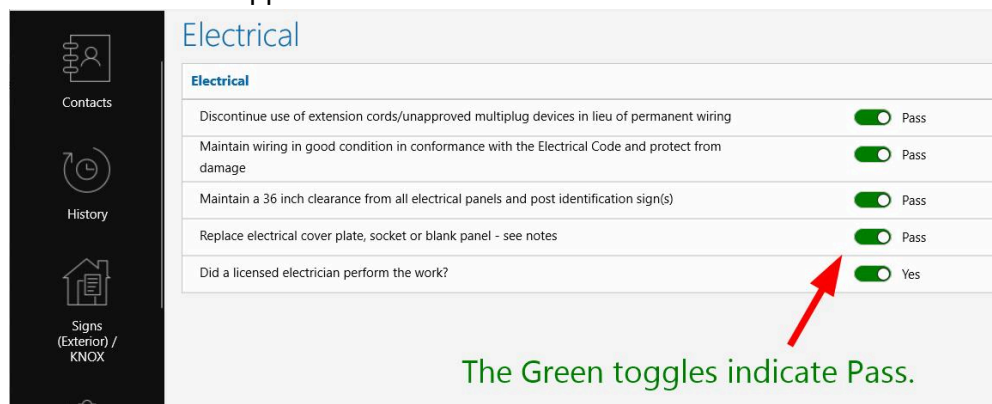
2. “Show Photos” will show photos in the “Photos” link under the question.
  - vi. Checking the “Email” box will send an email on a “Fail/No” response. An email will be sent to the address listed in the Email Templates tab under the Admin tab in the Admin portal.
  - vii. Note: When one or more of “Require Notes, Show Notes, Require Photos, Show Photos, and Email” are checked, it is usually because of a “Fail/No” answer.
- The “Show” and “Hide” tabs can be used to show and hide additional questions based upon the “False/No” response.
  - a. Questions will appear in these tabs after you have created more questions in the same checklist.
  - b. If no additional questions appear, no additional questions exist in this checklist.
- Other Properties: This tab allows you to configure the behavior for other questions that have been triggered by the response to this question. (I.e. If an additional question is set to “show” on a “No” response, the user can designate another question as “Required” or to “Require Notes,” etc...).
- Alert tab: Entering text in the Alert tab text box will trigger an alert message that will appear on the inspector’s tablet when answering this question.
  - a. If text is entered in the Alert tab in True Actions properties, the alert will appear when the inspector answers “True/Yes.”
  - b. Conversely, if text is entered in the Alert tab in False Actions properties, the alert will appear when the inspector answers “False/No.”
  - c. For instance, enter, “Are you sure?” to prompt the inspector to think twice about their response.



- d. Once you have entered all the necessary information in the “True Actions” settings, click “Assign” to save.

## Configuring Default Properties

- **Next, provide the settings for the default response.**
  - a. The Default Properties button controls HOW the question will initially load on the tablet when the inspector is performing the inspection.
  - b. For instance, if you mark the default settings to automatically set the answer to pass by checking the “Passed” box, the inspection will initially load the question in the Streamline app to Pass.

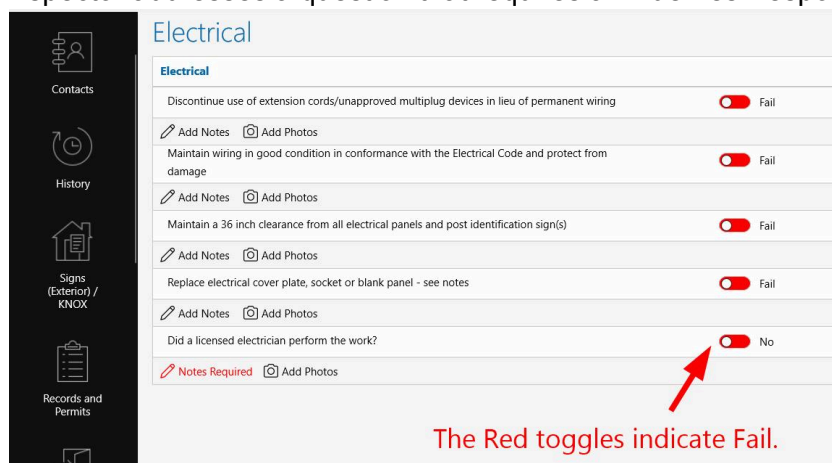


The screenshot shows the 'Electrical' category in the Streamline app. The left sidebar contains icons for Contacts, History, Signs (Exterior) / KNOX, and Records and Permits. The main area displays a list of five items, each with a green toggle switch indicating 'Pass'.

Item	Toggle	Status
Discontinue use of extension cords/unapproved multiplug devices in lieu of permanent wiring	Green	Pass
Maintain wiring in good condition in conformance with the Electrical Code and protect from damage	Green	Pass
Maintain a 36 inch clearance from all electrical panels and post identification sign(s)	Green	Pass
Replace electrical cover plate, socket or blank panel - see notes	Green	Pass
Did a licensed electrician perform the work?	Green	Yes

The Green toggles indicate Pass.

- c. Likewise, if you uncheck the “Passed” box, Streamline will load the question to initially fail. Doing so requires the inspector to change the toggle to Pass/True/Yes if he wants to indicate that the response to the question is Pass/True/Yes. This is useful if the Administrator wants to ensure that the inspector addresses a question that requires a “True/Yes” response.

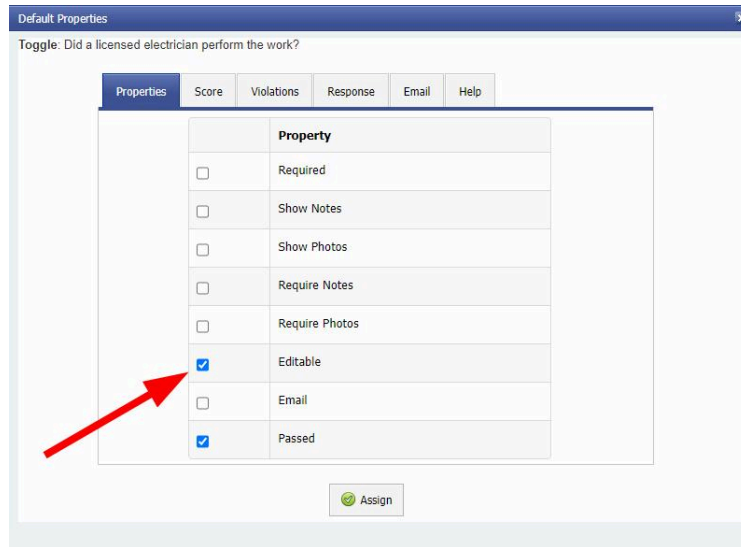


The screenshot shows the 'Electrical' category in the Streamline app. The left sidebar contains icons for Contacts, History, Signs (Exterior) / KNOX, and Records and Permits. The main area displays a list of five items, each with a red toggle switch indicating 'Fail'.

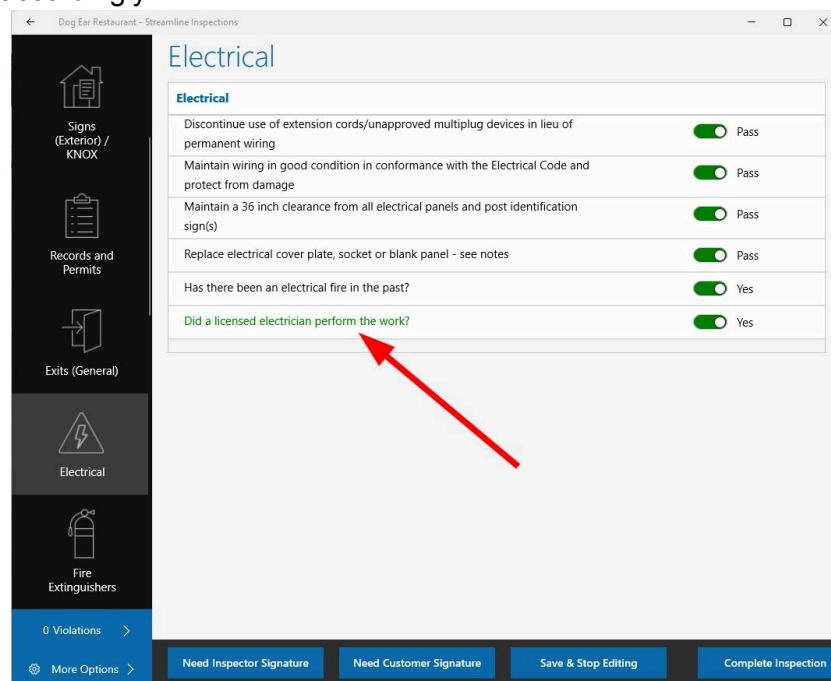
Item	Toggle	Status
Discontinue use of extension cords/unapproved multiplug devices in lieu of permanent wiring	Red	Fail
Add Notes Add Photos Maintain wiring in good condition in conformance with the Electrical Code and protect from damage	Red	Fail
Add Notes Add Photos Maintain a 36 inch clearance from all electrical panels and post identification sign(s)	Red	Fail
Add Notes Add Photos Replace electrical cover plate, socket or blank panel - see notes	Red	Fail
Add Notes Add Photos Did a licensed electrician perform the work?	Red	No

The Red toggles indicate Fail.

- d. You want to check the “Editable” box so that the question will be Editable. Editable means that the inspector can interact with the controls associated with the inspection (toggle, slider, etc...) and can provide an answer.



- e. You can control the question's text color with the “Required” checkbox.
- The text of the question will display as **red** or **green** if the “Required” checkbox is checked and you have configured True and False Actions accordingly.



- See Required settings in “[Configuring a True Response](#)” and “[Configuring a False Response](#)” above.
- f. If you want to require the inspector to record a note, you would check both “Show Notes” and “Require Notes” in the Default Properties.
- g. If you want to require the inspector to capture a photo, you would check both “Show Photos” and “Require Photos.” Though these options are usually left unchecked in Default Properties because they are usually only necessary if the answer to the question is, “No,” (i.e. No, a licensed electrician did not perform the work.).

- h. If you check the “Email” box in Default Properties, an email will be sent as soon as the inspection is completed and synced if the inspector does not interact with the question. Again, you typically don’t want to check the “Email” box because emails are usually only necessary if the inspection issues a violation as a result of a NO/Fail answer.

• **You must also choose the proper response in the “Response” Tab.**

- a. Check the proper box in the Response tab to match settings for your desired “true or false” answers.
- If you want the question to load as “Pass/Yes” and have already configured the Pass/Yes response in the True Response settings, check “True.” Doing so tells Streamline to apply the True settings to the initial appearance & function of the question when the inspection loads on the tablet.
  - If you want the question to load as “Fail/No” and have already configured the Fail/No response in the False Response settings, check “False.” Doing so tells Streamline to apply the False settings to the initial appearance & function of the question when the inspection loads on the tablet.

**b. A very important note!!!**

- If you want the question to initially load with a “Pass” or “Yes” response, you must ensure that the checkboxes in the “Properties” tab in Default Properties match those on the “Properties” tab in the “True Actions” settings.

- And vice versa. If you want the question to initially load “No,” you must ensure that the checkboxes in the “Properties” tab of Default Properties

match the checkboxes in the “Properties” tab of the False Actions settings.

The image shows two side-by-side screenshots of a software configuration interface. Both windows have a 'Properties' tab selected. The left window, titled 'Default Properties', has a 'Toggle' header and a 'Property' list with checkboxes for 'Required', 'Show Notes', 'Show Photos', 'Require Notes', 'Require Photos', 'Editable', 'Email', and 'Passed'. The right window, titled 'False Response', has a 'False Response' header and a similar 'Property' list. Red boxes highlight the checkbox columns in both windows, and red arrows point to the 'Toggle' and 'False Response' headers.

Property	Default Properties	False Response
Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Show Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Show Photos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Require Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Require Photos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Editable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>
Passed	<input type="checkbox"/>	<input checked="" type="checkbox"/>

iii. Failure to do so will result in a toggle that does not function properly.

## Adding a Violation to Appear on an Inspection Report

- The “Violations” tab will allow you to specify a violation that will be recorded on the inspection report the event of a Fail/No response.

Default Properties

Toggle: Did a licensed electrician perform the work?

Properties Score **Violations** Response Email Help

Category: VIOLATION

Groups: ELECT

Violation: OTH.EL10.L - Have an electri

Remove Violation

Self Certification

Enabled: ☐

Inspector Modify: ☐

Default Value: ☒ Yes ☐ No

Require Image: ☒ Yes ☐ No

Assign

- Select the Category of violation first (IFC 2018, CFC 2016, etc...).
- Once the Category settings have loaded, from the “Groups” dropdown box, select the section in which the violation appears (i.e. Electrical, Hazmat, etc...).
- Once the Groups settings have loaded, choose the Violation (i.e. 1201.2 Electrical Wiring and Equipment).
- This violation will be recorded on your inspection report when the question is recorded as a Fail/No response.
- Note:** If no violation is entered in the “Violations” tab, no violation will be recorded on the inspection report, regardless of whether a “Fail/No” is marked on the tablet.

## Making a Violation a Self-Certification Violation

- **Self-Certification settings**

- To save the inspector from returning to an inspection site to reinspect a violation, Streamline allows Administrators and/or inspectors to designate violation repairs to be self-certified by the customer.
- You can set repairs to allow *Self-Certification* by checking the “Enable” checkbox in the Violations tab.

The screenshot shows the 'Default Properties' window with the 'Violations' tab selected. The window title is 'Default Properties'. Below the title bar, there is a toggle switch labeled 'Toggle: Maintain a 36 inch clearance from all electrical panels and post identification sign(s)'. The 'Violations' tab is active, showing a 'Category' dropdown set to 'VIOLATION', a 'Groups' dropdown set to 'ELECT', and a 'Violation' dropdown set to 'EL01 - Maintain 36 between r'. There is a 'Remove Violation' button. A red box highlights the 'Self Certification' section, which contains the following settings: 'Enabled' (checked), 'Inspector Modify' (checked), 'Default Value' (radio buttons for 'Yes' and 'No', with 'Yes' selected), and 'Require Image' (radio buttons for 'Yes' and 'No', with 'No' selected). An 'Assign' button is located at the bottom of the window.

- When the “Default Value” is set to Yes, Streamline initially loads the question to allow for self-certification of repaired violations. In this case, Streamline will not schedule a re-inspection for a violation pertaining to this question.
- Checking the “Inspector Modify” button will allow the inspector to redesignate the inspection violation as one that requires a reinspection (or vice versa). This change is performed by clicking on the violation text that appears under the question on the tablet.



**Electrical**

Check	Status
Discontinue use of extension cords/unapproved multiplex devices in lieu of permanent wiring	Pass
Maintain wiring in good condition in conformance with the Electrical Code and protect from damage	Pass
Maintain a 36 inch clearance from all electrical panels and post identification sign(s)	Fail

**Violation Information**

Repaired: ☐ No ☐ Yes

Self-Certification: ☒ Yes

CodeSet: VIOLATION

Code: EL01

Description: Maintain 36 between electrical equipment storage

Comments:

Buttons: More Options, Need Inspector Signature, Need Customer Signature, Save & Stop Editing, Complete Inspection

- e. The “Require Image” checkbox indicates whether the customer must provide an image to prove that he/she has made the necessary repairs to clear the violation. The customer will upload the image on the customer portal. Check the box to require photographic proof.
- Email tab: The Email tab is used to send an email based upon a particular response to the question. For instance, on a “No” response, an email can be sent to the Fire Marshal or city attorney. From the dropdown box, select the name of the email template that contains the appropriate email recipient and the preconfigured email text.