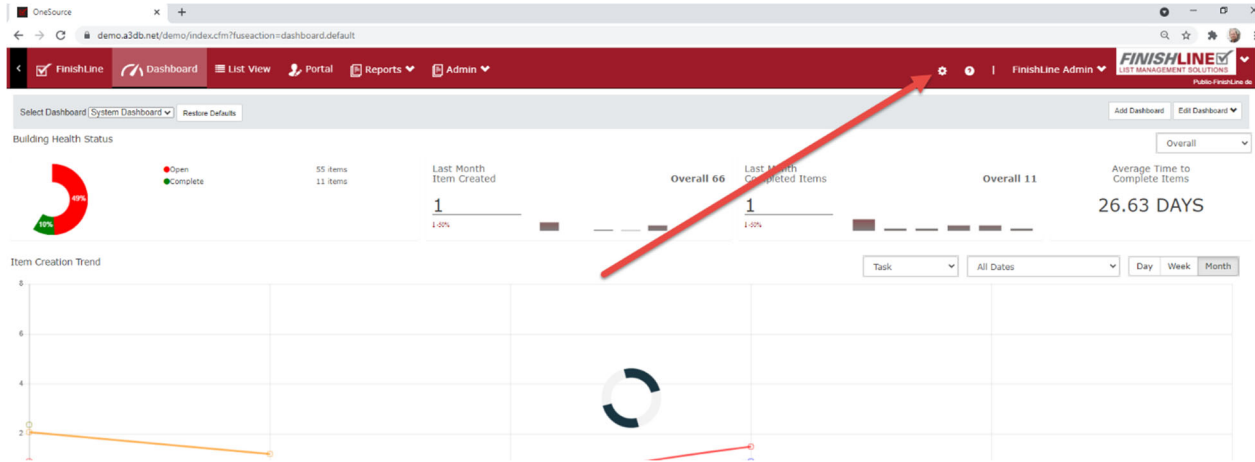
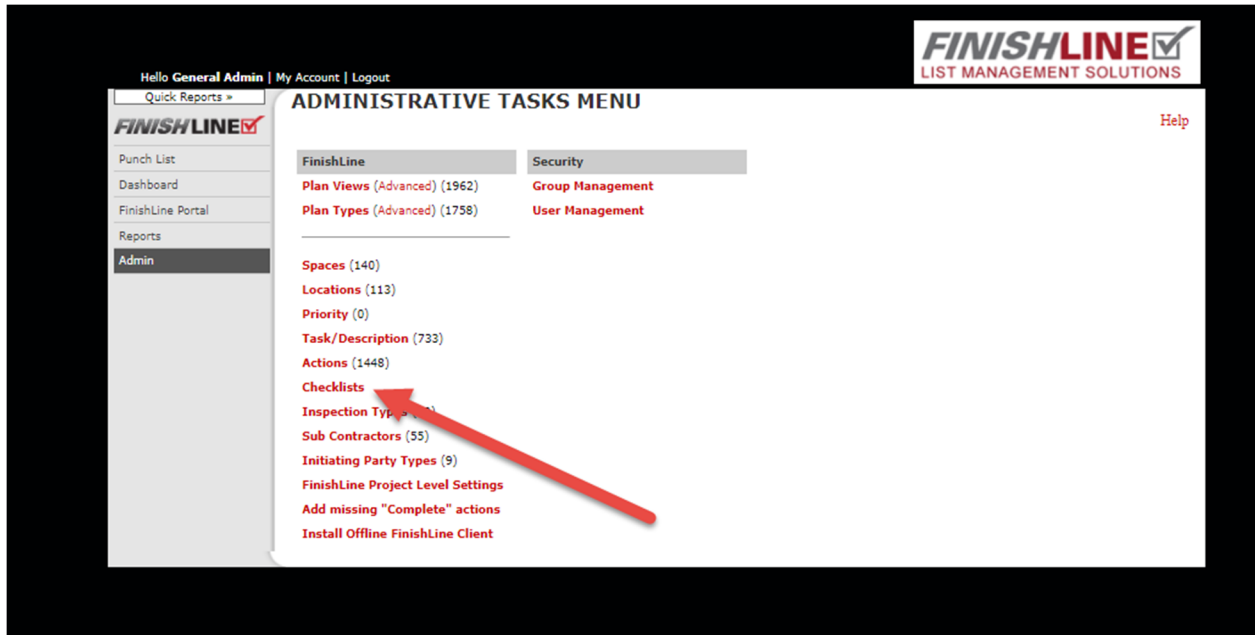


## Creating a Checklist in FinishLine

Log into your FinishLine website and click this icon to enter the admin area.

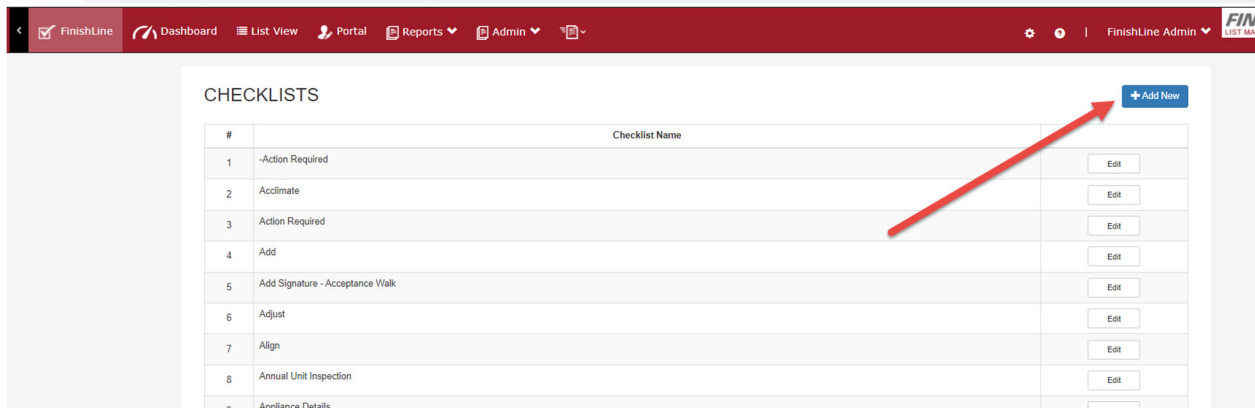


Choose “Checklists” From the admin menu.



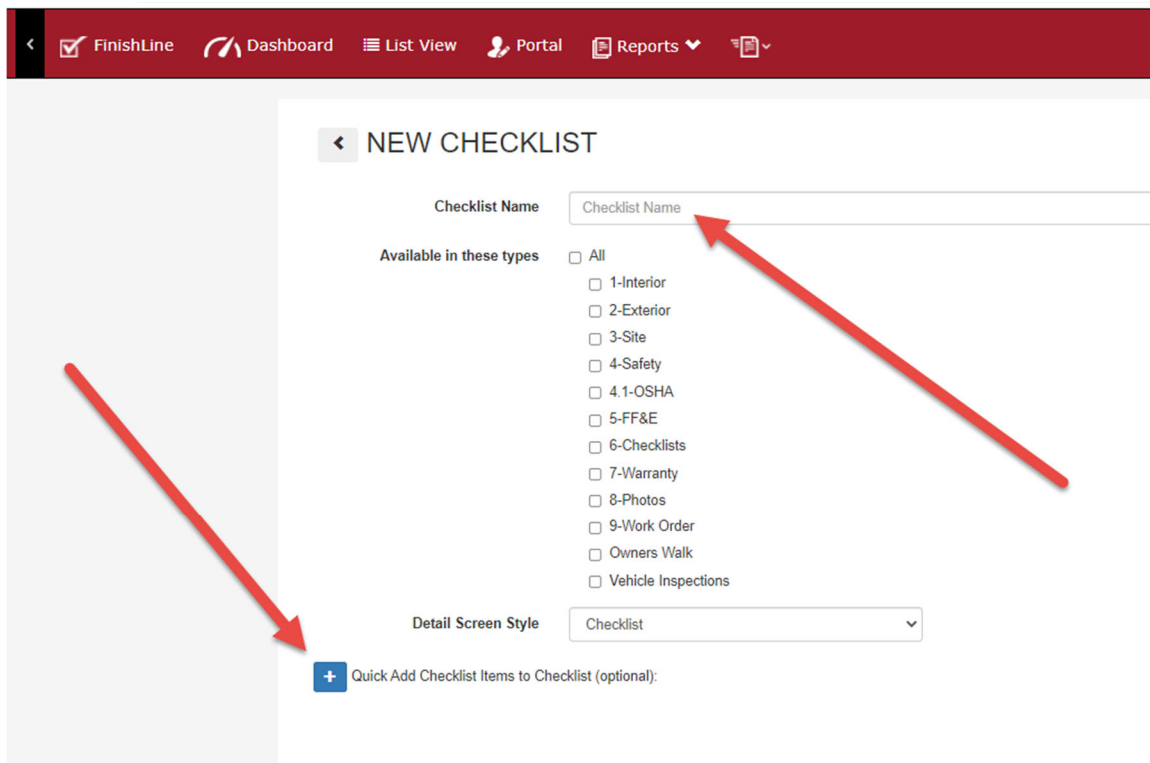
## Creating a Checklist in FinishLine

Click the “+Add New” Button.



Give the Checklist a Name.

Click on the Blue “+” Button.



## Creating a Checklist in FinishLine

List all of your checklist items.

**NEW CHECKLIST**

Checklist Name:

Available in these types:

- All
- 1-Interior
- 2-Exterior
- 3-Site
- 4-Safety
- 4.1-OSHA
- 5-FF&E
- 6-Checklists
- 7-Warranty
- 8-Photos
- 9-Work Order
- Owners Walk
- Vehicle Inspections

Detail Screen Style:

Quick Add Checklist Items to Checklist (optional):

New Checklist Items | Select from Existing

Step 1  
Step 2  
Step 3  
Step 4  
Step 5  
Step 6  
Step 7  
Step 8

Example

All dampers and sensors are accessible (access doors)  
All penetrations sealed - housing piping, duct  
All safeties installed and properly verified  
All valves and test ports are easily accessible  
All wiring installed and secured per contract documents  
Area clear and swept clean.  
Balancing valves installed as required

**Push to List**

Click the “Push to List” Button.

**NEW CHECKLIST**

#	Checklist Item Name	Action	From Checklist Item	
1	Step 1	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>
2	Step 2	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>
3	Step 3	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>
4	Step 4	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>
5	Step 5	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>
6	Step 6	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>
7	Step 7	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>
8	Step 8	<input checked="" type="radio"/> Add New <input type="radio"/> Use Existing	0 match	<input type="button" value="Remove"/>

**Push to List**

## Creating a Checklist in FinishLine

Here you can assign items to Sub-Contractors, Create groups and move your items into these groups by sliding them with the slide bar grips. Save & Exit.

The screenshot shows the 'CONFIGURE CHECKLIST' screen. At the top, there's a navigation bar with 'FinishLine Admin' and a 'Save & Exit' button. Below that, a 'Group Name' field is highlighted. The main area is a table with the following columns: Checklist Item, Interval, Interval Base, Due Date, Sub Contractor, and Action. The table contains items like 'Kitchen', 'Step 1' through 'Step 8', 'Dining Rm', and 'Complete'. A sidebar on the left is labeled 'Slide Bar' and contains a list of items with slide bar grips. Red arrows point to the 'Group Name' field, the 'Slide Bar', the 'Add Checklist' button, and the 'Save & Exit' button.

Checklist Item	Interval	Interval Base	Due Date	Sub Contractor	Action
Kitchen					Delete
Step 1	0	Due Date			Delete
Step 2	0	Due Date			Delete
Step 3	0	Due Date			Delete
Step 4	0	Due Date			Delete
Dining Rm					Delete
Step 5	0	Due Date			Delete
Step 6	0	Due Date			Delete
Step 7	0	Due Date			Delete
Step 8	0	Due Date			Delete
Completion					Delete
Complete	0	Due Date			Delete

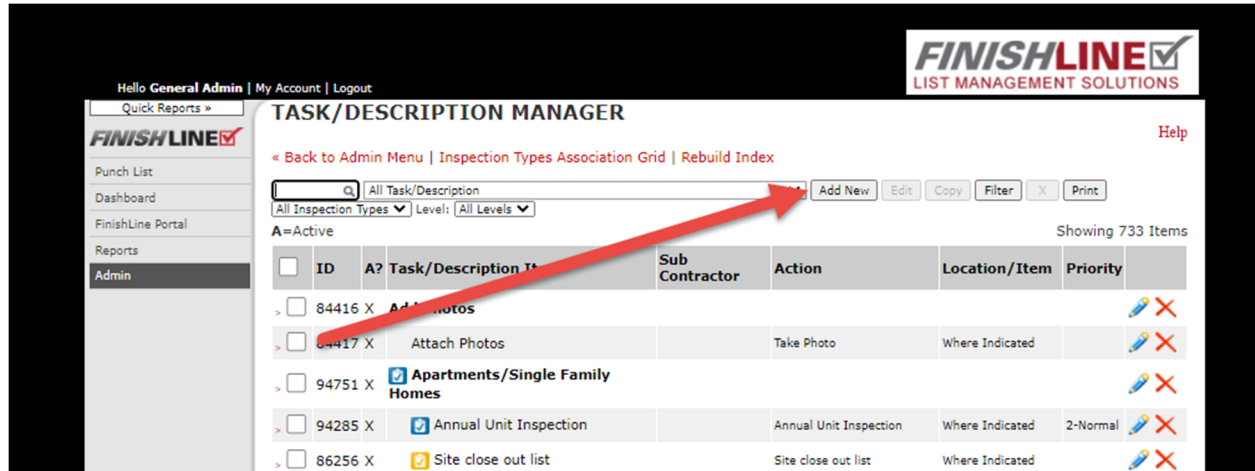
Go back to the Admin menu. Select Task/Descriptions.

The screenshot shows the 'ADMINISTRATIVE TASKS MENU' in FinishLine. The menu lists various administrative tasks with counts. A red arrow points to 'Task/Description (731)'. The menu items are:

- Spaces (140)
- Locations (113)
- Priority (0)
- Task/Description (731)
- Actions (1448)
- Checklists
- Inspection Types (12)
- Sub Contractors (55)
- Initiating Party Types (9)
- FinishLine Project Level Settings
- Add missing "Complete" actions
- Install Offline FinishLine Client

## Creating a Checklist in FinishLine

Click on the “Add New” button.



The screenshot shows the FinishLine web application interface. At the top right, the logo reads "FINISHLINE ✓ LIST MANAGEMENT SOLUTIONS". Below the logo, the user is logged in as "General Admin" with options for "My Account" and "Logout". A "Quick Reports" link is also visible. On the left side, there is a navigation menu with items: "Punch List", "Dashboard", "FinishLine Portal", "Reports", and "Admin". The main content area is titled "TASK/DESCRIPTION MANAGER" and includes a "Help" link. Below the title, there are navigation links: "< Back to Admin Menu | Inspection Types Association Grid | Rebuild Index". A search bar contains "All Task/Description" and "All Inspection Types" is selected. To the right of the search bar are buttons for "Add New", "Edit", "Copy", "Filter", "X", and "Print". Below the search bar, it says "A=Active" and "Showing 733 Items". A table lists tasks with columns: ID, A?, Task/Description, Sub Contractor, Action, Location/Item, and Priority. The table contains five rows of data. A red arrow points from the "Add New" button to the first row of the table.

<input type="checkbox"/>	ID	A?	Task/Description	Sub Contractor	Action	Location/Item	Priority	
> <input type="checkbox"/>	84416 X		Attach Photos					
> <input type="checkbox"/>	84417 X		Attach Photos		Take Photo	Where Indicated		
> <input type="checkbox"/>	94751 X		Apartments/Single Family Homes					
> <input type="checkbox"/>	94285 X		Annual Unit Inspection		Annual Unit Inspection	Where Indicated	2-Normal	
> <input type="checkbox"/>	86256 X		Site close out list		Site close out list	Where Indicated		

## Creating a Checklist in FinishLine

- 1) Create a “Task/Description Name:” called Checklists
- 2) Remove checkmark form “Selectable” box
- 3) Choose the Inspection Type you want it available in
- 4) Click “Save” Button.

The screenshot displays the 'TASK/DESCRIPTION:' form in the FinishLine application. The form is titled 'TASK/DESCRIPTION:' and includes a breadcrumb trail 'Admin Menu > Task/Description List >'. The form fields are as follows:

- Parent:** A dropdown menu with the value '<Main Task/Description>'. A red arrow points to this field.
- Task/Description Name:** A text input field containing 'Checklists'. Above it are radio buttons for 'Single' (selected) and 'Multiple'. Below it are radio buttons for 'Checklists' (selected) and 'Description'. A red arrow points to the 'Checklists' radio button.
- Active:** A checkbox that is checked.
- Selectable?:** A checkbox that is unchecked. A red arrow points to this checkbox.
- Comments:** A text area.
- Icon:** A dropdown menu.
- Or upload new:** A text input field with an 'Upload File' button.
- Show Icon on Plan:** Radio buttons for 'No' (selected) and 'Yes'.
- Default Resolution Action:** A dropdown menu.
- Default Sub-Contractor:** A dropdown menu.
- Default Location/Item Type:** A dropdown menu.
- Default Priority:** A dropdown menu.
- Available in these types:** A list of checkboxes for various inspection types. The '6-Checklists' option is checked. A red arrow points to this option.

At the bottom of the form, there are five buttons: 'Save', 'Save & Copy', 'Save & New', 'Save & Next', and 'Cancel'. A red arrow points to the 'Save' button.

Red arrows and numbered circles (1-4) are overlaid on the screenshot to indicate the steps: 1 points to the 'Checklists' radio button, 2 points to the 'Selectable?' checkbox, 3 points to the '6-Checklists' radio button, and 4 points to the 'Save' button.

## Creating a Checklist in FinishLine

Select “Checklists” in the dropdown menu, Click “Add New” button.

Quick Reports »

Hello General Admin | My Account | Logout

**FINISHLINE** ✓  
LIST MANAGEMENT SOLUTIONS

**ACTION TYPE MANAGER** Help

Record Saved

< Back to Admin Menu | Inspection Types Association Grid | Rebuild Index

Search: Checklist Name

All Inspection Types | Level: All Levels

A=Active Showing 1440 Items

ID	A?	Action Type Item	Sub Contractor	Auto Acts
69450	X	-Action Required		(A: 1) (C)
66594	X	Abrasive Wheel Grinders		(A: 21) (C)
66595	X	Angle Exposure - Cylindrical		
66596	X	Angle Exposure - Periphery		
66597	X	Angle Exposure - Snagging		
66598	X	Angle Exposure - Surface		

## Creating a Checklist in FinishLine

- 1) Give the checklist a name.
- 2) Add Icon (Optional)
- 3) Change “Show Icon on Plan” to “Yes” (Optional)
- 4) Choose your checklist in the dropdown “Default Resolution Action”.
- 5) Set “Default Location/Item Type” to “Where Indicated”.
- 6) Choose the Inspection Type(s) where this checklist is available.
- 7) Save

The screenshot shows the 'TASK/DESCRIPTION:' form in the FinishLine Admin interface. The form is titled 'TASK/DESCRIPTION:' and includes a 'Quick Search' bar at the top left. The main form area contains the following fields and options:

- Project:** Sales demo
- Parent:** Checklists
- Task/Description Name:** Checklist 1
- Active:**
- Selectable?:**
- Comments:** (Empty text area)
- Icon:** (Empty text input)
- Show Icon on Plan:**  No  Yes
- Default Resolution Action:** Checklist Name
- Default Sub-Contractor:** (Empty dropdown)
- Default Location/Item Type:** Where Indicated
- Default Priority:** (Empty dropdown)
- Available in these types:**  All,  1-Interior,  2-Exterior,  3-Site,  4-Safety,  4.1-OSHA,  5-PF&E,  6-Checklists,  7-Warranty,  8-Photos,  9-... Order,  Owners Walk,  Vehicle Inspections

Red arrows and numbers 1-7 point to the following fields:

- 1) Task/Description Name
- 2) Icon
- 3) Show Icon on Plan
- 4) Default Resolution Action
- 5) Default Location/Item Type
- 6) Available in these types (6-Checklists)
- 7) Save

Any questions? Email [support@punchlist.net](mailto:support@punchlist.net) or call 1-888-869-8685