

The FinishLine Screen is divided into **three dynamic Windows**: The Navigation Window, The Plan View Window and the List View Window.

The **Sizer controls** can be used to adjust the size of the Windows. Click and drag on them to adjust the window sizes.

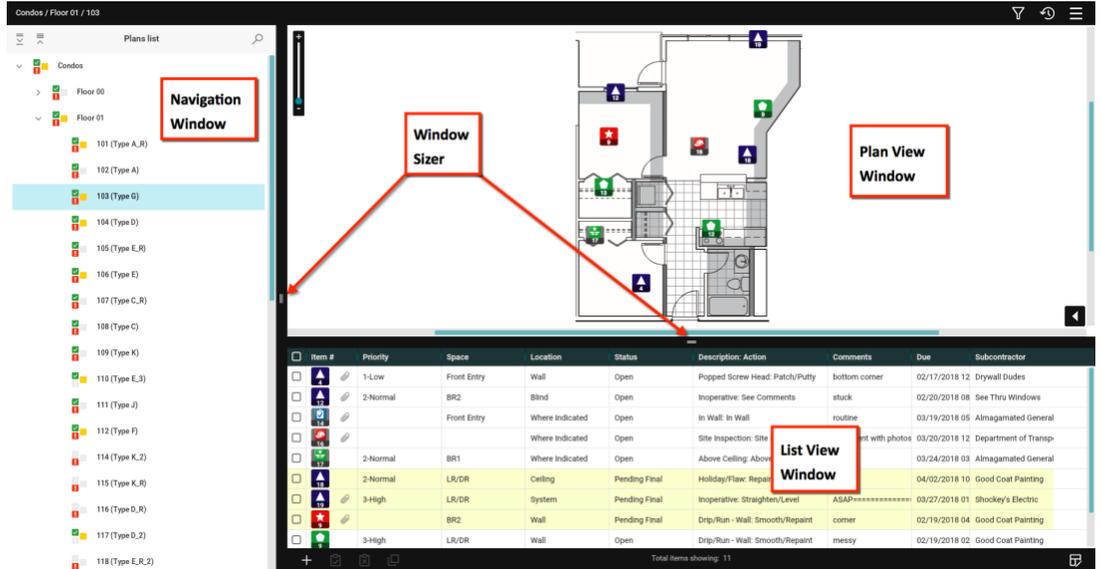
The **Navigation Window** quickly moves you from Plan View to Plan.

The green, red and yellow symbols on these icons indicate the existence and status of Punch items. The green squares ✓ indicate completed items and the red square ❗ indicates open items. The yellow Square Icon ⚠ indicates Pending Final items.



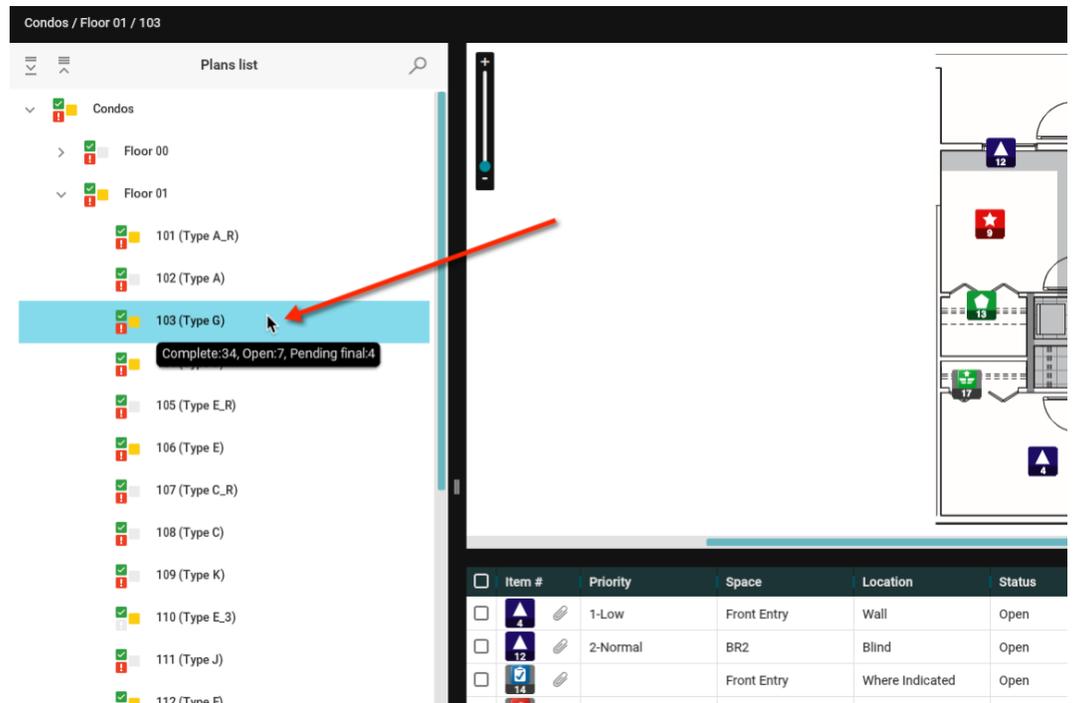
Hovering over an area in the navigation window will give you a quick count of the items within that area and their status.

These accumulate the higher up the tree you go. In the example to the right, hovering over 103 (Type G) shows the Status of items in Unit 103, hovering over the Floor 01 shows the status of all the items in all the rooms in Floor 02, etc.



The **Plan View** is where you add and edit Punch or Checklist items.

The **List View** reflects all the items in the Plan View in a List format.



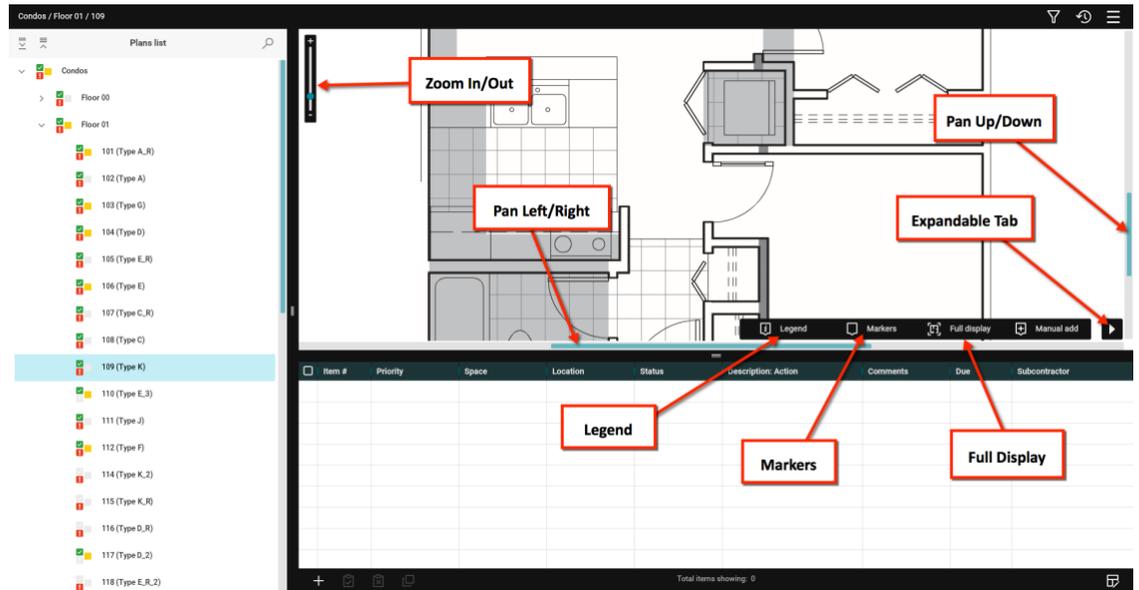
Use the zoom slider to zoom in or out on the Plan View. Use the vertical and horizontal scroll bars to pan up/down and left/right.

Full Display allows you to zoom out to full view if you've been zoomed in on the Plan View. Access the Full Display option by selecting the white triangle in the black square to expand the tab.

You can also access **Legend** and **Markers** from the expandable tab.

Legend provides a description for the different punch icons on the Plan View.

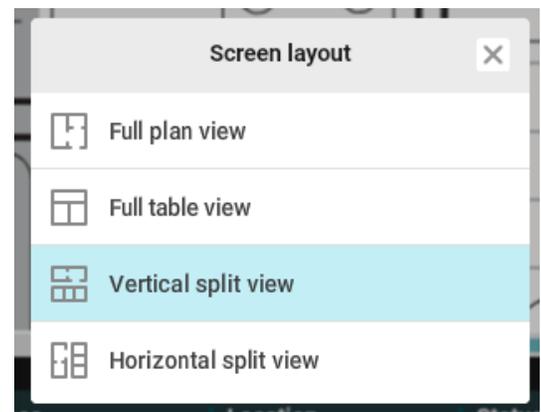
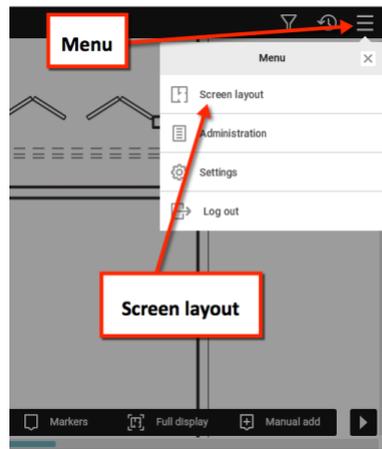
Markers allows you to hide the punch icons on the Plan View to have a clean view.



Select **Menu** in the upper right to access **Screen layout** which allows you to change your view of the Plan and List View, depending on your preferences.

The Screen layout allows the following 4 options:

- 1) Full plan view
- 2) Full table view
- 3) Vertical split view
- 4) Horizontal split view

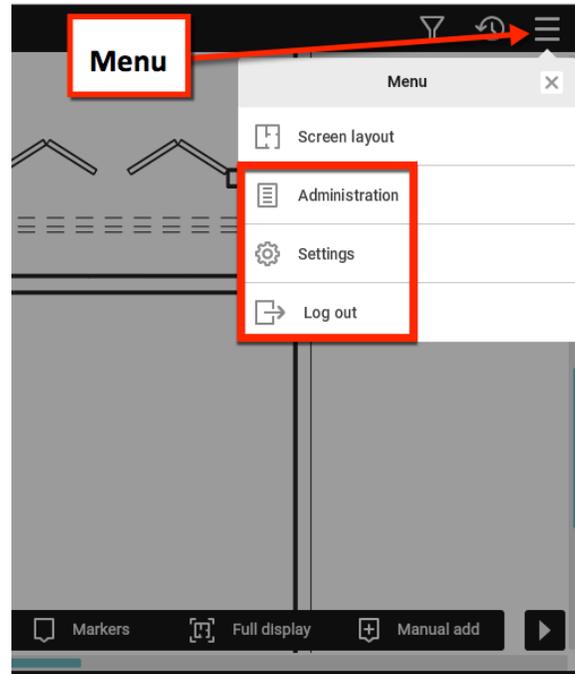


You may access other options from the **Menu**:

Administration: this will take you to the admin area of FinishLine.

Choose **Settings** to access and modify several different settings in FinishLine.

Log out will allow you to log out from your current session.

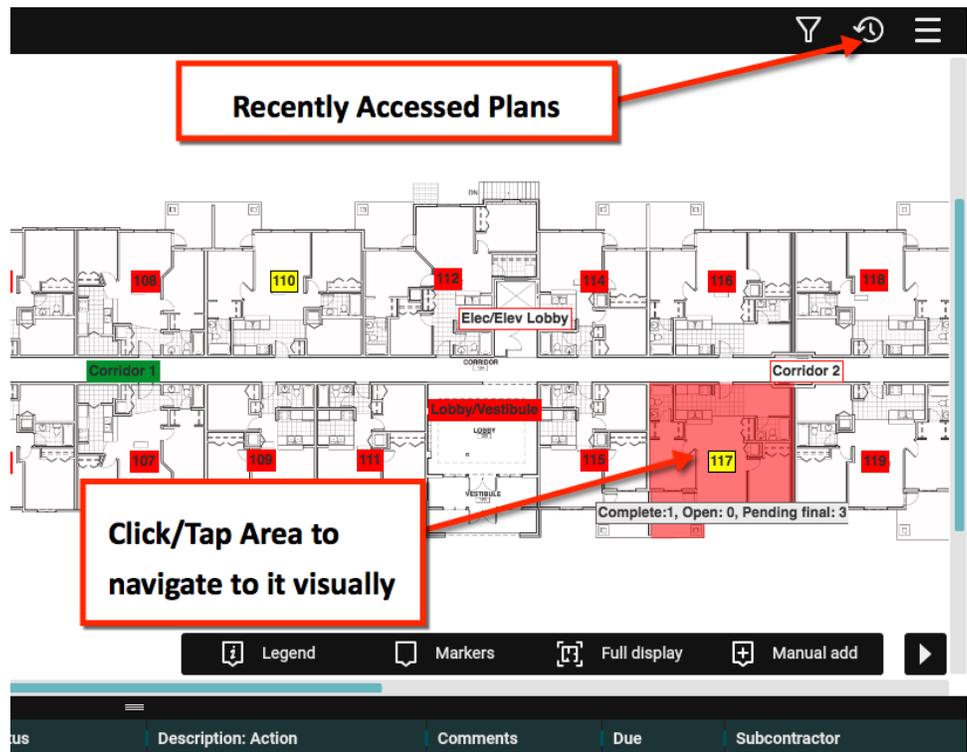


Visual Navigation

Some installations include the ability to navigate to an area by clicking or tapping on that area on a larger plan.

You can use the **Recently Accessed Plans** panel in the upper right to return to the plan views you recently accessed.

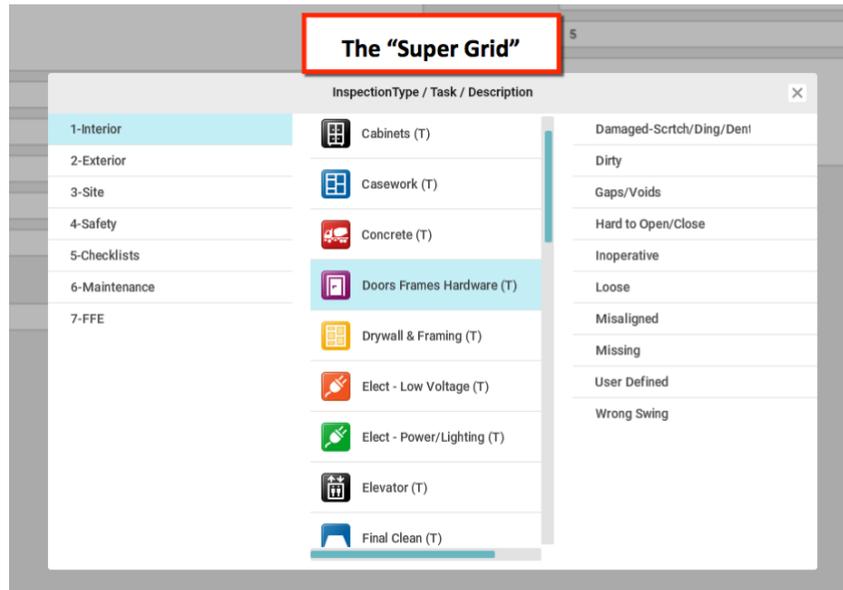
HINT: The labels will also show status for that area, outline red for no items; solid red for at least one open item; solid yellow for no open items, but at least one pending final; and solid green for all items closed.



Creating an item

Touch anywhere on the plan view and the **“Super Grid”** will come up, make your selections for the Inspection Type, Task, and Description, and the add item form will appear.

Depending on what choice you make in the first column, related tasks will cascade in the second column and so forth. Make your selection in the third column and the add item form will appear.

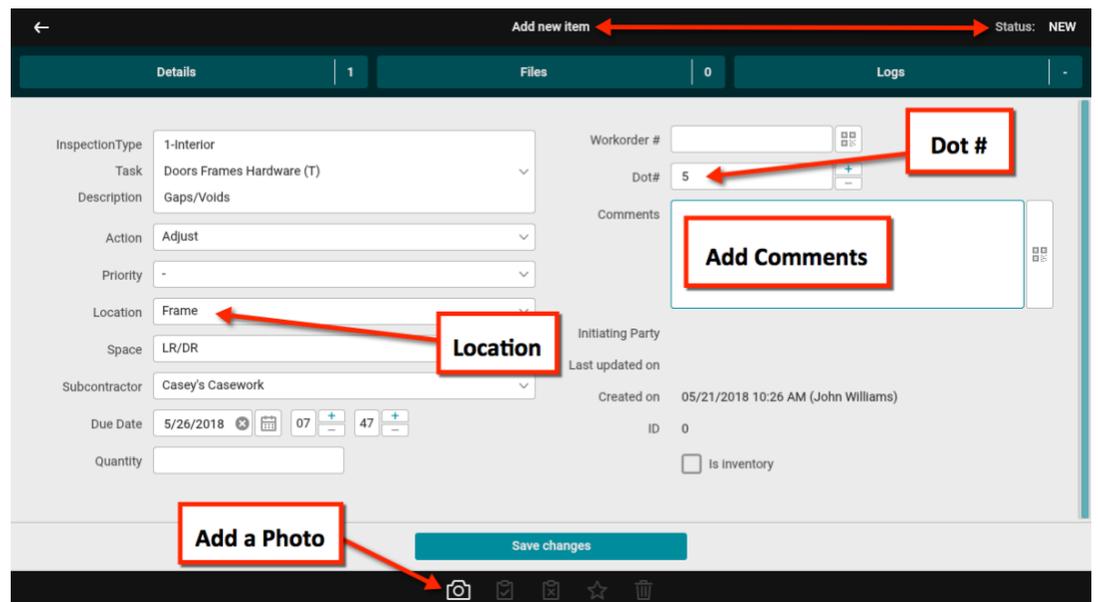


The **Add new item** form will be indicated by the “Add new item” text across the top of the item form and the “Status: NEW” text.

The **Dot#** is filled in automatically based on the next available Dot#.

A default **Action, Location, Space, and Sub Contractor** will be automatically displayed by your choices for Task and Description. You can over-ride these defaults.

Add any **Comments, Photos,** or other information and then **Save changes**.



Location is the specific location of the problem or item. This allows for locating an item in a 3 dimensional world using a 2 dimensional screen.

Action tells the sub how to correct the issue. Clean, Repair, Add, Paint Etc.

Space identifies the areas within a housing unit. Kitchen, Bedrooms, Bathrooms, Hallways, Etc. Note: your project may not use the space field.

Edit an Item

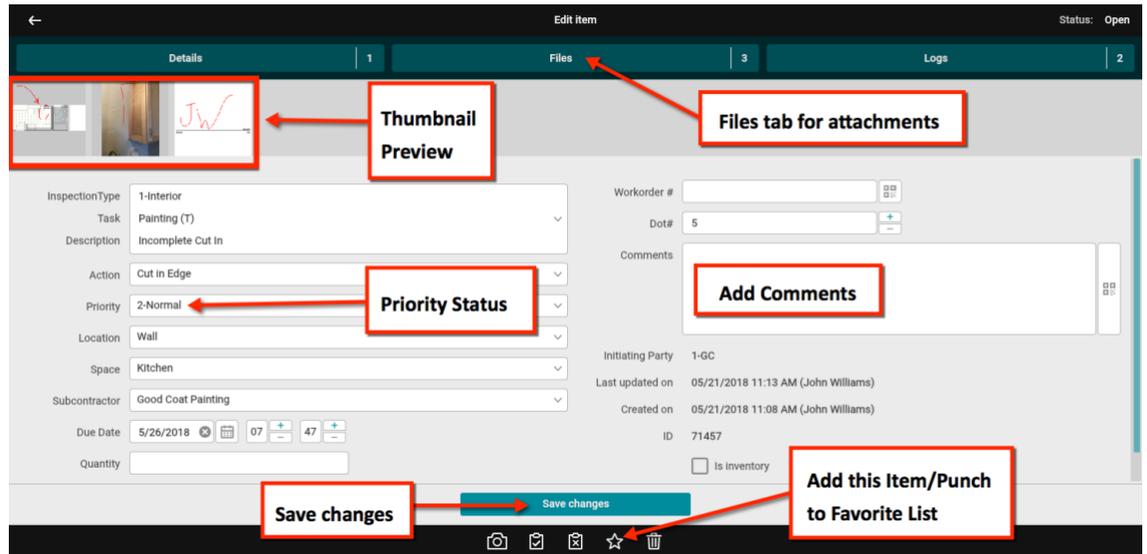
To move a punch click/touch and drag it to the desired location.

Simply click/touch on an existing item in the Plan View to edit. For example, you can add a **Comment** or a **Priority Status**.

When done click/touch **Save changes**. Do Not click on Complete as this will “Clear or Close” the item.

Select the camera button to take a photo. Select the **Files** tab to attach a file, utilize the signature option, or annotate on the plan.

If an Item has attached files you’ll see a thumbnail preview across the top of the item form.

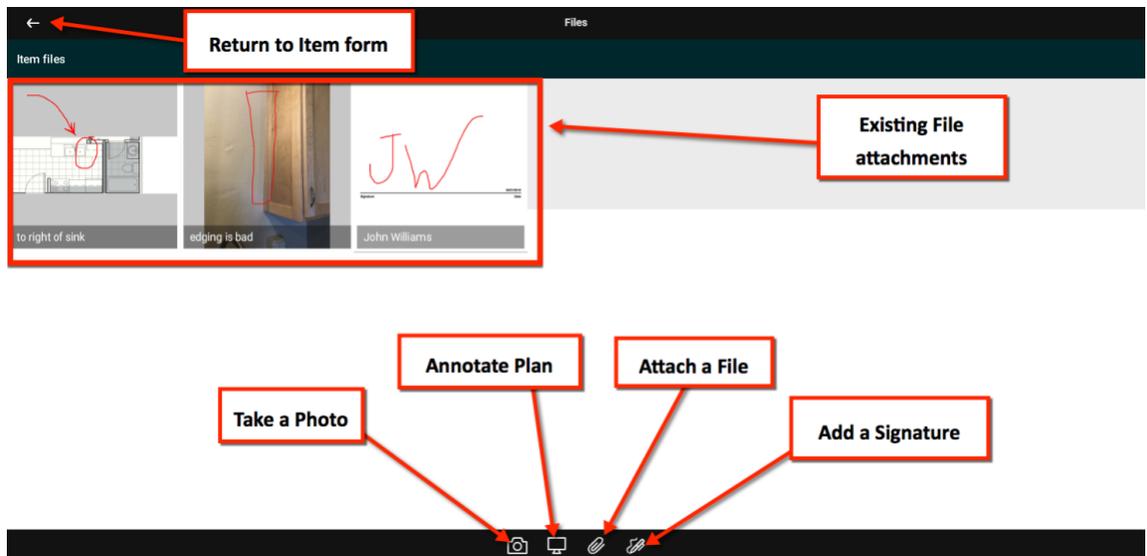


Files area

Use the buttons at the bottom of the **Files** page to take a photo, annotate on the plan, attach files, and add signatures.

If there are existing file attachments for an item, you’ll see them here. To edit just click on the thumbnail.

Select the arrow in the upper left to return to the Item form.



To Complete an Item

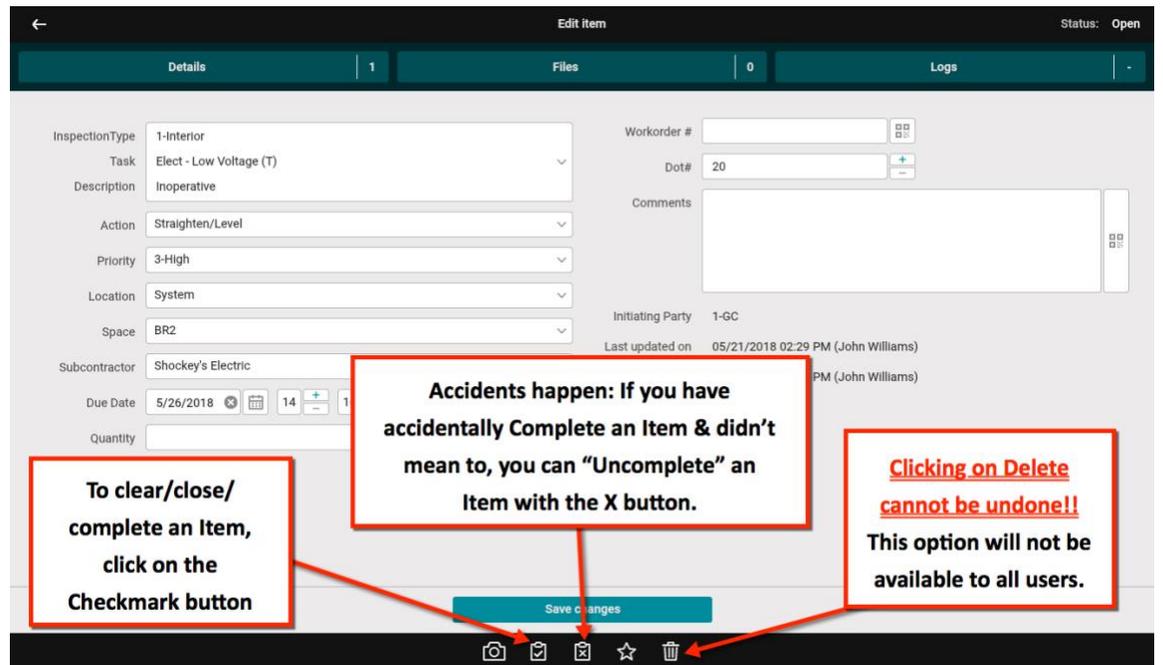
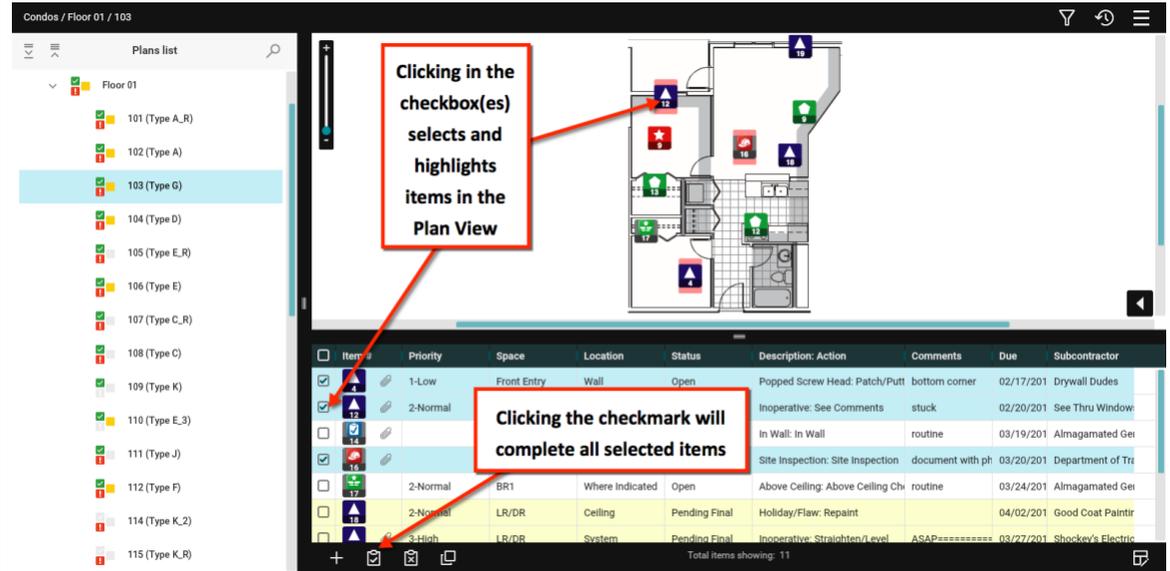
Simply touch or click on an existing item in the plan view and then click on the **Complete** button, which has a checkmark.

This item will disappear from the plan and list views but it is still in the database as a completed item. To view these items choose "All Status" in the Filter.

NOTE: You can Uncomplete an item by selecting the **Uncomplete** button which has an X. You cannot, however, Undelete an item. The Delete option will not be available to some users.

You can also complete multiple items at once. In the list view check them on the left side and click on the **Complete** button.

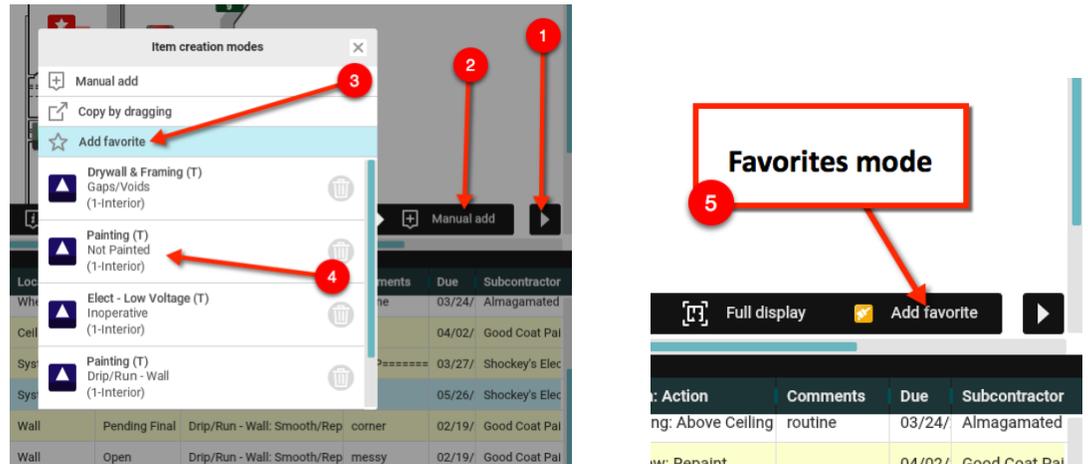
If you click on one or more checkboxes, FinishLine will highlight the items in the plan view.



Using Favorites

Using Favorites allows you to quickly add repetitive items.

- 1) Open the **Expandable Tab** by selecting the white triangle.
- 2) Open the **Item creation modes** menu.
- 3) Select **Add favorite**.
- 4) Then choose your desired item from your Favorites list.
- 5) Start using Favorites



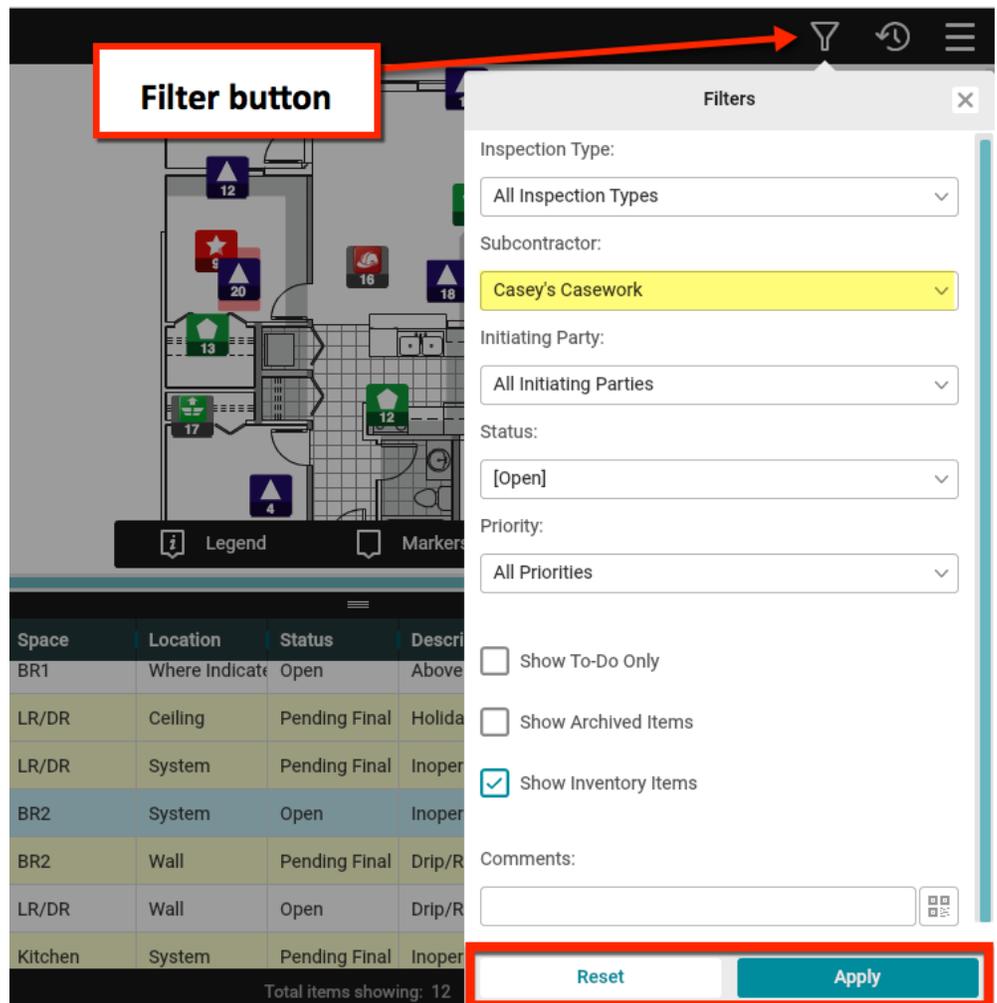
Using Filters

In the upper right of the FinishLine screen is the **Filter** control. It allows you to filter by **Inspection Type**, **Subcontractor**, **Initiating Party**, **Status**, **Priority** OR any combination.

Once you have selected your filters, click on **Apply**. Notice that the items that were previously in the plan view and the list view are filtered to your criteria. For this example, we are filtering for one subcontractor – Casey’s Casework.

The default filter is ALL open items.

Click on the Reset button to set the filter to the default.



Reports

NOTE: Stand Alone Users:
You have to be connected to the Internet to print reports.

Click on **Reports** for the report selection screen to come up.

Choose which area(s) to include in your report.

Most customers inspect an area and then print and process the area they just finished inspecting.

NOTE: You can print without the Plan View or photos if you are just looking at the data for progress purposes, etc. You could, for example print out just a list by sub contractor of all the open items.

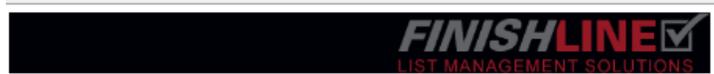
Select which area(s) you want to print

Select additional criteria

Click on Create Report

A print preview will display in a new window.

The default report is one report page for each sub contractor for each unit with only their items displayed.

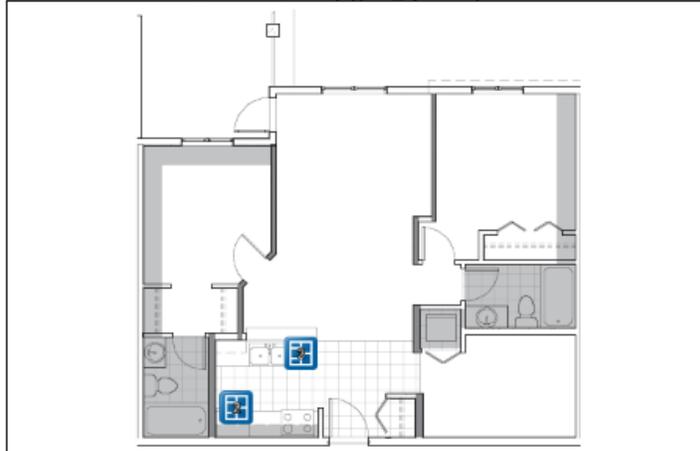


FinishLine

100%

Produce or Email Report...
05/21/18

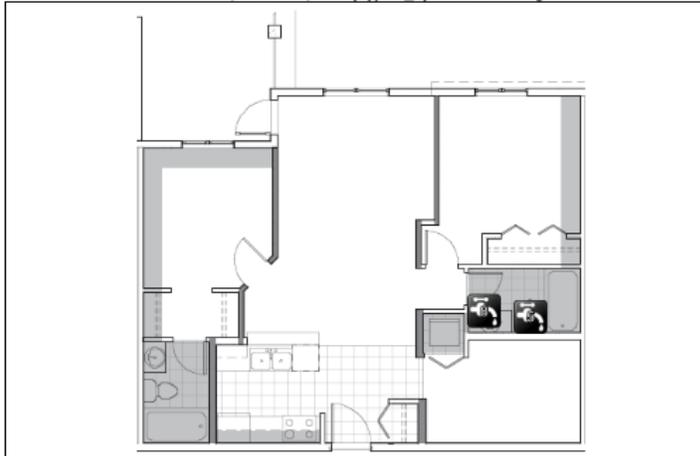
Condos / Floor 02 / 219 (Type E_3) - Casey's Casework



#	Unit / Item ID	Space	Location	Task	Type	Sub Contractor	Due Date	Status	Last Edit	Done?
2	219 ID: 71464	Kitchen	Joint	Casework (T) / Gaps/Voids	1-Interior	Casey's Casework	05/26/18	Open	JW	
				Fill		Casey's Casework	05/26/18		JW	No
3	219 ID: 71465	Kitchen	Door	Casework (T) / Misaligned	1-Interior	Casey's Casework	05/26/18	Open	JW	
				Align		Casey's Casework	05/26/18		JW	No

05/21/18

Condos / Floor 02 / 219 (Type E_3) - ABC Plumbing



#	Unit / Item ID	Space	Location	Task	Type	Sub Contractor	Due Date	Status	Last Edit	Done?
5	219 ID: 71467	Bath 1	Faucet	Plumbing (T) / Inoperative	1-Interior	ABC Plumbing	05/26/18	Open	JW	
				Repair		ABC Plumbing	05/26/18		JW	No
8	219 ID: 71476	Bath 1	Fixture	Plumbing (T) / Loose	1-Interior	ABC Plumbing	05/26/18	Open	JW	
				Tighten		ABC Plumbing	05/26/18		JW	No

05/21/18

Emailing Reports directly to Sub contractors

If your report is grouped by sub contractor, FinishLine will produce an individual report for each sub that can be emailed directly to them.

Click on the “Produce or Email Report” link. Normally the sub contractors Email addresses will be displayed.

If a sub contractor does not have an email address in FinishLine, their report will be emailed to the person creating the report.

The screenshot shows the FinishLine interface with a progress bar at 100%. Below the progress bar is a link that says "Produce or Email Report...". Underneath is a "Report Options" section with two radio buttons: "Single report (~7 plan views)" and "Breakdown report for each sub contractor". The second option is selected. Below the radio buttons is a table with two columns: "Sub Contractor" and "Email".

Sub Contractor	Email
Finishline Complete	tomorr@active3db.com
Casey's Casework	Cboatman@CCasework.com
ABC Plumbing	PPiper@ABCplumbing.com
Almagated General Contracting	larry@almagc.com
QT Electric	Jane@Bogus.com
Gynormous Plumbing and Mechanical	Pete@Gynormous.com
Fire Protect Builders, LLC	JStamos@FireProtect.com

Below the table is a "Generate Report" button. At the bottom left of the screenshot, the date "05/21/18" is visible.

Once all the PDF reports are generated, it will list the Company Name, Email Address(s) Report Name and file size.

You are able to cc: other email addresses (for multiple addresses, separate with a semicolon “ ; “) . They will receive a copy of all reports generated.

You can also edit the subject line and body of the email. Press Send Email. You will get a confirmation screen.

NOTE: You can produce a single report, NOT broken down into individual reports by choosing “Single Report” above.

NOTE: Any of these reports can be opened from the screen by clicking on the PDF icon or file name link and then saving to your hard drive or printed.



FinishLine
Punch List Reports

PDF Compression is: *Off*

Report Options

To

Receipient Name	Email	Attachment File	Size
ABC Plumbing	PPiper@ABCplumbing.com	 report_ABC_Plumbing.pdf View as HTML	0.09 MB
Almagamated General Contracting	larry@almagc.com	 report_Almagamated_General_Contracting.pdf View as HTML	0.1 MB
Casey's Casework	Cboatman@CCasework.com	 report_Casey_s_Casework.pdf View as HTML	0.09 MB
Finishline Complete	tomorr@active3db.com	 report_Finishline_Complete.pdf View as HTML	0.1 MB
Fire Protect Builders, LLC	JStamos@FireProtect.com	 report_Fire_Protect_Builders__LLC.pdf View as HTML	0.09 MB
Gynormous Plumbing and Mechanical	Pete@Gynormous.com	 report_Gynormous_Plumbing_and_Mechanical.pdf View as HTML	0.1 MB
QT Electric	Jane@Bogus.com	 report_QT_Electric.pdf View as HTML	0.1 MB

CC
(Press 'Enter' after each email address)

Subject

Body

Syncing the Stand Alone Version

The stand alone Windows Tablet version is virtually identical to “online” version in functionality with the exception of the Sync Menu Option.

Before going out to inspect hook your computer/tablet up so that it has access to the Internet.

Once you are sure you have a connection click/touch the **Sync** button on the Menu bar. It should take just a few minutes to download any updated files from the server and upload any data you have collected from inspections.

Synchronize as often as is practical, synchronizing with the server will insure that all users are seeing the same information.

NOTE: Reports – You MUST be connected to the Internet to print reports from within the Stand Alone version.

