

The dashboard header includes navigation links for FinishLine, Dashboard, Portal, Reports, and a gear icon for settings. The user is identified as Bob Anderson. Below the header, there are dashboard controls like 'Select Dashboard' (set to System Dashboard) and 'Restore Defaults'. Performance metrics are displayed, including a donut chart showing 47% Complete and 53% Open items, and various item creation and completion statistics. A blue arrow points to the gear icon in the top right navigation bar.

**From the Dashboard, click the gear icon to access the Admin Tasks Menu**  
*If you do not see the gear icon, you do not have administrative rights.*

The 'ADMINISTRATIVE TASKS MENU' is displayed with various categories: Contacts, Security, Project Management, Communications, and Events & Announcements. Under the Security category, 'User Management' is highlighted with a blue arrow. Other categories include Activity Types, Contact Types, Address Types, Referral Sources, Ratings, Relationship Types, and Sales Reps.

**Click "User Management"**

The 'USER DIRECTORY' page shows a list of users with columns for ID, Active status, Last Name, First Name, Email Address, Username, Initiating Party, Primary Project, and Update Date. At the top, there are navigation links: '< Back to Admin Menu | Add New User | Show Passwords'. A blue arrow points to the 'Add New User' link. Below the navigation links, there are filters for Project, Init. Party, and Sort, along with a search bar and pagination controls.

**Click "Add New User"**

**USER:**

User Information

Primary Project: FinishLine

First Name: Meghan

Last Name: Smith

Email Address: m.smith@punchlist.net

Username: msmith

Password: \*\*\*\*\* [Reveal Password](#)  
Password must contain at least 4 letters (or special characters) and 2 digits

Signature: Project Manager  
FinishLine

Default Initiating Party Type: 1-GC

Active?  Yes  No

User of these groups:

- FinishLine - Admin
- FinishLine - Portal User
- FinishLine - Punch User

Buttons: Save, Save & Send Welcome Email, Cancel

Annotations:

- Select the Initiating Party the user belongs to (points to Default Initiating Party Type)
- Select permission group(s) (points to User of these groups)
- Add Details for the new User and save it (points to Save button)

**NOTES:** Default Initiating party groups users into categories. (I.E. General Contractors, Architects, Owner, etc.) This also controls the dot shape/color in the FinishLine Pro App. To allow a user to create/complete punches and run reports, add them to the “Punch User” group. Portal Users are generally sub-contractors. The Welcome Email sends a user project login details and their username and password.

**Log In**  
FinishLine (fdemo)

Username: jsmith

Password: \*\*\*\*\*

Remember Me

Login

Refresh user list

Login Details not recognised

Once you have added the new user to the system it will need to be loaded onto the device.

**Method 1:** Login as an existing user. New user credentials will be downloaded when the device syncs.

**Method 2:** You try to login in and get “Login Details not Recognized”.

Click on the “Refresh User List” button to download your new user’s credentials to the device.