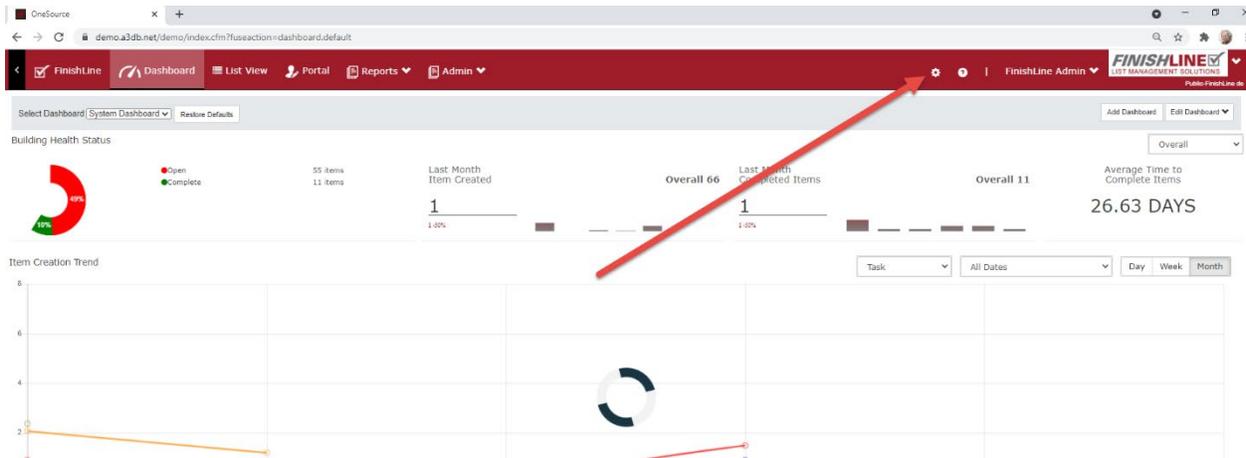
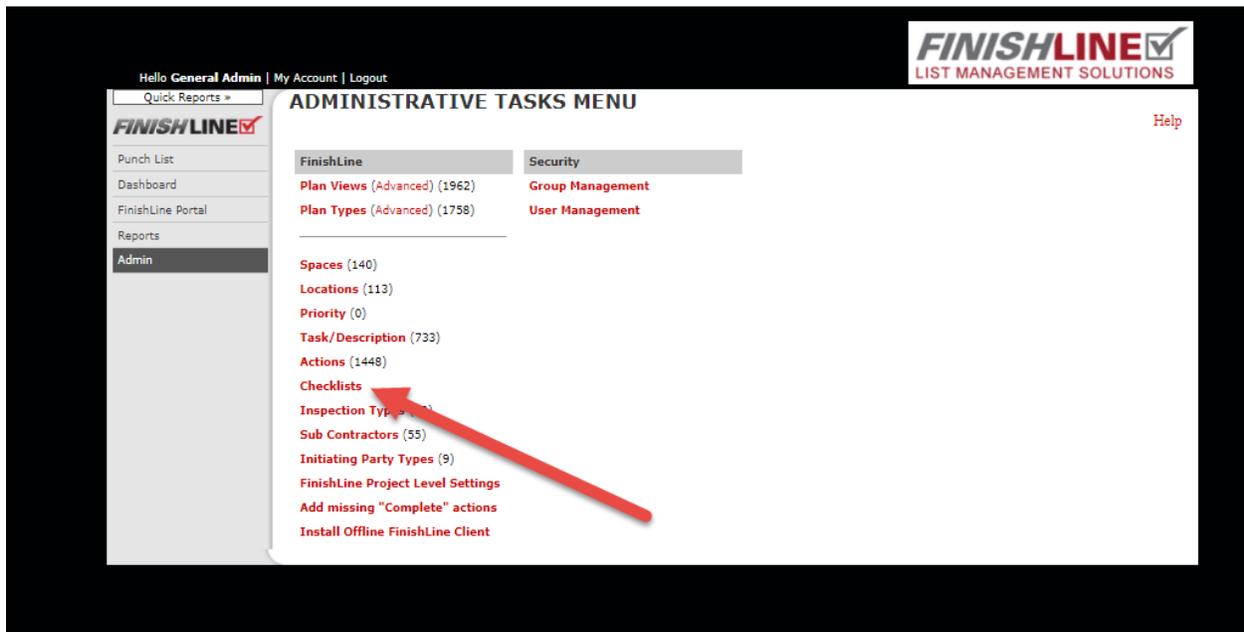


## Creating a Checklist in FinishLine

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

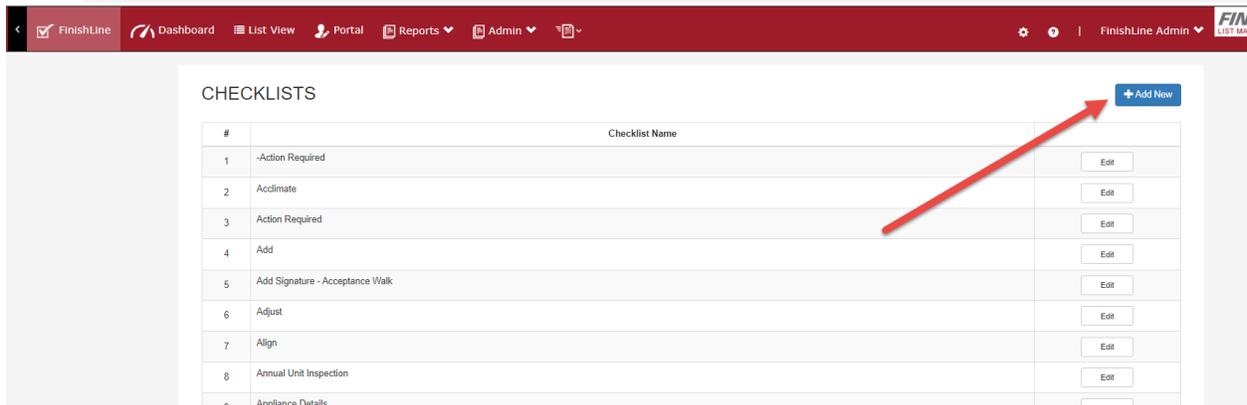


Choose “Checklists” From the admin menu.



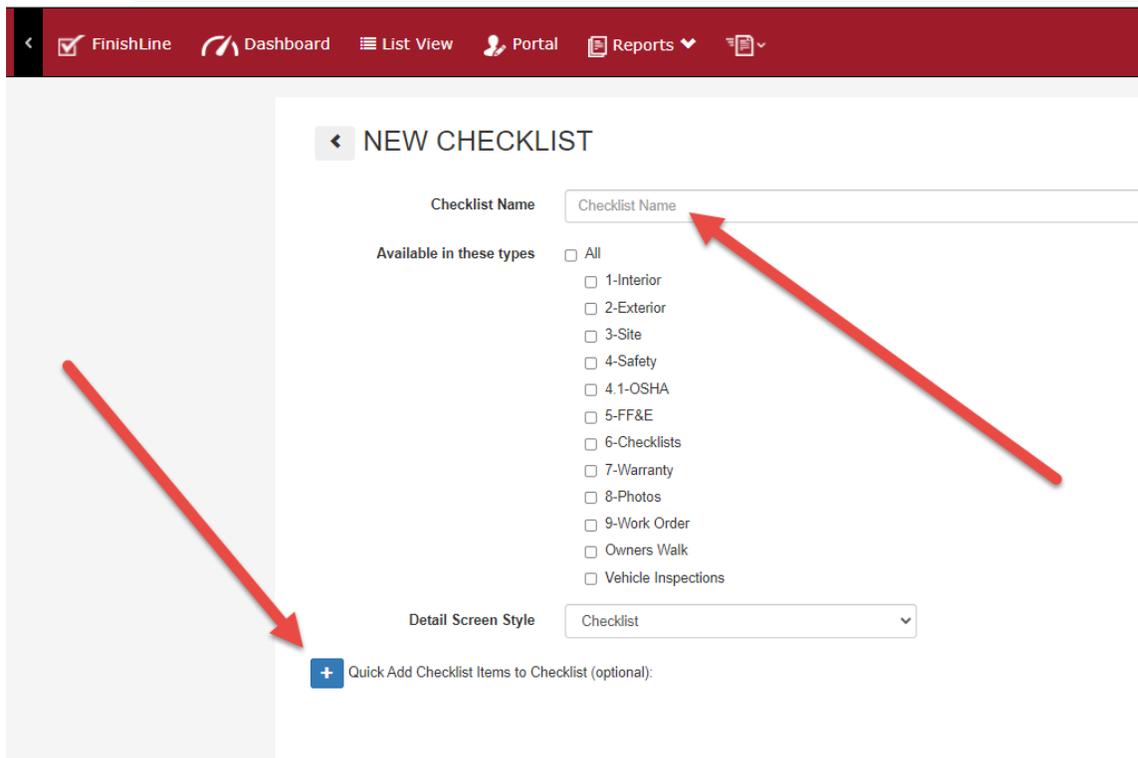
## Creating a Checklist in FinishLine

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** [Delete] [Save & Exit] [Configure List]

Checklist Name:

Available in these types:

- All
- 1-Interior
- 2-Exterior
- 3-Site
- 4-Safety
- 4.1-OSHA
- 5-A&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' page. At the top, there is a navigation bar with 'FinishLine Admin' and a 'Save & Exit' button. Below the navigation bar, there is a 'Group Name' field and a 'Checklist Name' field. The main content area is a table with the following columns: Checklist Item, Interval, Interval Base, Due Date, Sub Contractor, and Action. The table contains 10 rows of items, including 'Kitchen', 'Step 1' through 'Step 8', 'Dining Rm', and 'Completion'. A sidebar on the left contains a 'Slide Bar' for moving items. Red arrows point to the 'Group Name' field, the 'Slide Bar', 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

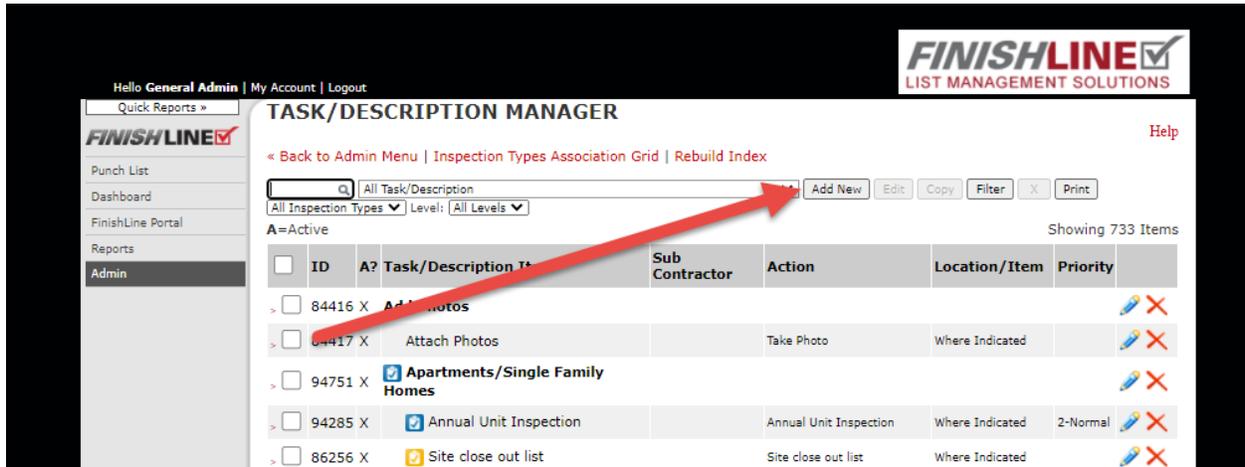
Go back to the Admin menu. Select Task/Descriptions.

The screenshot shows the 'ADMINISTRATIVE TASKS MENU' page. The page has a navigation bar with 'Hello General Admin | My Account | Logout' and 'FINISHLINE LIST MANAGEMENT SOLUTIONS'. The main content area is a list of administrative tasks and their counts. A red arrow points to the 'Task/Description (731)' item.

- 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 visible on the left. The main content area is titled "TASK/DESCRIPTION MANAGER" and includes a "Help" link. Navigation links include "Back to Admin Menu", "Inspection Types Association Grid", and "Rebuild Index". A search bar contains "All Task/Description" and a filter dropdown is set to "All Inspection Types". A row of buttons includes "Add New", "Edit", "Copy", "Filter", "X", and "Print". Below this, a table lists tasks with columns for "ID", "A?", "Task/Description", "Sub Contractor", "Action", "Location/Item", and "Priority". The table shows five tasks, including "Attach Photos", "Apartments/Single Family Homes", "Annual Unit Inspection", and "Site close out list". A red arrow points from the "Add New" button to the first row of the table.

ID	A?	Task/Description	Sub Contractor	Action	Location/Item	Priority
84416 X		Attach Photos		Take Photo	Where Indicated	
94751 X		Apartments/Single Family Homes				
94285 X		Annual Unit Inspection		Annual Unit Inspection	Where Indicated	2-Normal
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 shows the 'TASK/DESCRIPTION:' form in the FinishLine application. The form is titled 'TASK/DESCRIPTION:' and includes a navigation breadcrumb 'Admin Menu > Task/Description List >'. The form fields are as follows:

- Parent:** <Main Task/Description>
- Task/Description Name:** Single (selected), Multiple (unselected). The text 'Checklists' is entered in the input field.
- Active:**
- Selectable?:**  (indicated by red arrow 2)
- Comments:** (empty text area)
- Icon:** (empty dropdown menu)
- Or upload new:** (empty input field) Upload File
- Show Icon on Plan:** No (selected), Yes (unselected)
- Default Resolution Action:** (empty dropdown menu)
- Default Sub-Contractor:** (empty dropdown menu)
- Default Location/Item Type:** (empty dropdown menu)
- Default Priority:** (empty dropdown menu)
- Available in these types:** All (selected), 1-Interior, 2-Exterior, 3-Site, 4-Safety, 4.1-OSHA, 5-FF&E, 6-Checklists (checked), 7-Warranty, 8-Photos, 9-Work Order, Owners Walk, Vehicle Inspections.

At the bottom of the form, there are buttons: Save, Save & Copy, Save & New, Save & Next, and Cancel. Red arrows and numbered circles (1-4) indicate the steps: 1 points to the 'Task/Description Name' field, 2 points to the 'Selectable?' checkbox, 3 points to the '6-Checklists' checkbox, and 4 points to the 'Save' button.

## Creating a Checklist in FinishLine

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

Quick Reports »

FINISHLINE ✓  
LIST MANAGEMENT SOLUTIONS

Hello General Admin | My Account | Logout

### ACTION TYPE MANAGER

Record Saved

Help

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

Search: Checklist Name [Add New] [Edit] [Copy] [Filter] [X] [Print]

All Inspection Types | Level: All Levels

A=Active Showing 1440 Items

<input type="checkbox"/>	ID	A?	Action Type Item	Sub Contractor	Auto Acts
> <input type="checkbox"/>	69450	X	-Action Required		(A: 1) (C) [Pencil] [X]
> <input type="checkbox"/>	66594	X	Abrasive Wheel Grinders		(A: 21) (C) [Pencil] [X]
> <input type="checkbox"/>	66595	X	Angle Exposure - Cylindrical		[Pencil] [X]
> <input type="checkbox"/>	66596	X	Angle Exposure - Periphery		[Pencil] [X]
> <input type="checkbox"/>	66597	X	Angle Exposure - Snagging		[Pencil] [X]
> <input type="checkbox"/>	66598	X	Angle Exposure - Surface		[Pencil] [X]

## 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 Insepection Type(s) where this checklist is available.
- 7) Save

The screenshot shows the 'TASK/DESCRIPTION:' form in the FinishLine application. 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 dropdown menu)
- Show Icon on Plan:**  No  Yes
- Default Resolution Action:** Checklist Name
- Default Sub-Contractor:** (Empty dropdown menu)
- Default Location/Item Type:** Where Indicated
- Default Priority:** (Empty dropdown menu)
- 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