

Adding a New Subcontractor to FinishLine

There are 4 steps involved in adding a new subcontractor to FinishLine.

Step 1 – Adding the subcontractor company

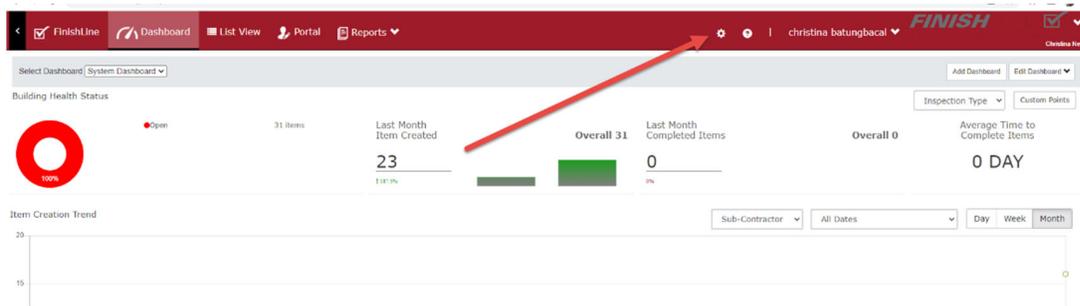
Step 2 – Assigning subcontractor to correct Task

Step 3 – Creating a login for subcontractor

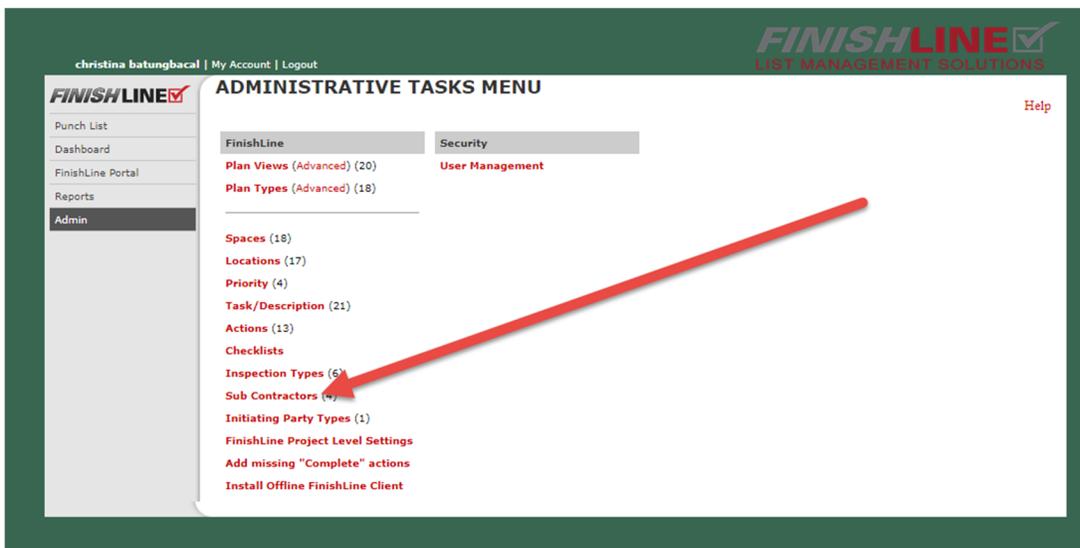
Step 4 – Email login credentials to the sub

Step 1 – Adding the subcontractor company.

From the Dashboard, click on the gear icon to access the admin area.

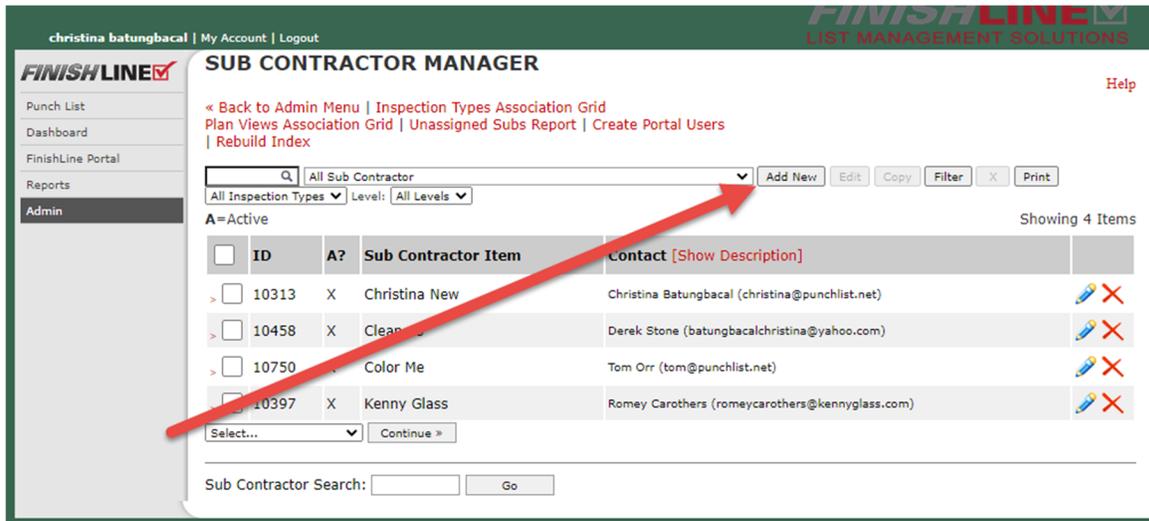


From the Administrative Tasks Menu click on the Sub Contractors link.

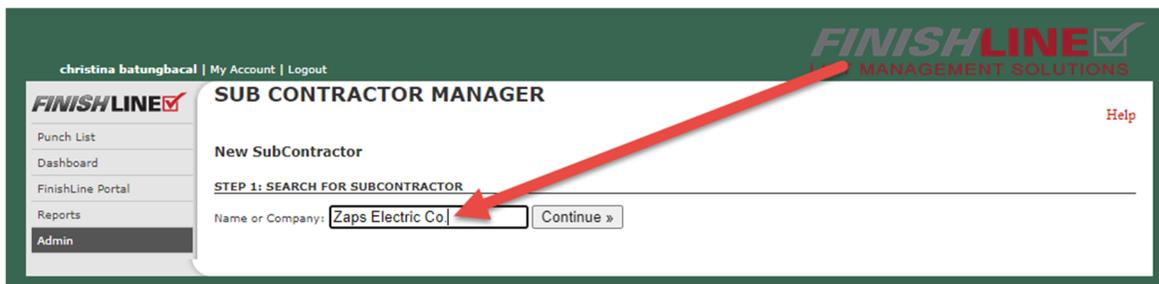


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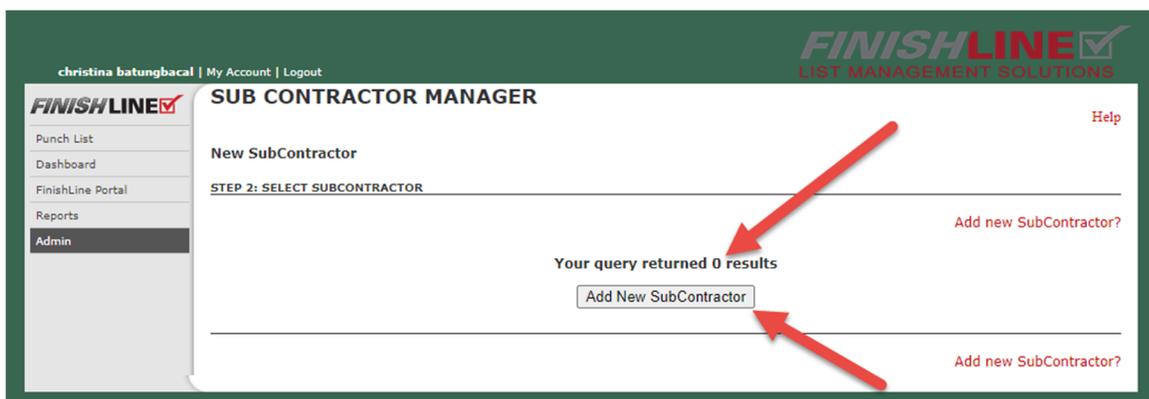
From the Sub Contractor Manager Menu, Click on the Add New button.



Type in the Name of the Subcontractors Company and click Continue Button.



The program will first check to see if your subcontractor already exists for this project. If your query returns a result of 0, click on the Add New SubContractor button.



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On this screen choose the “All” checkbox for Available in these types.

Add in the Contact info for this sub. If there are more than one contact, separate their names and phone numbers with a backslash “/” and separate their email addresses with a semicolon “;”. (The phone numbers are optional)

The email address or addresses are where the reports will be sent.

Click on the Save button.

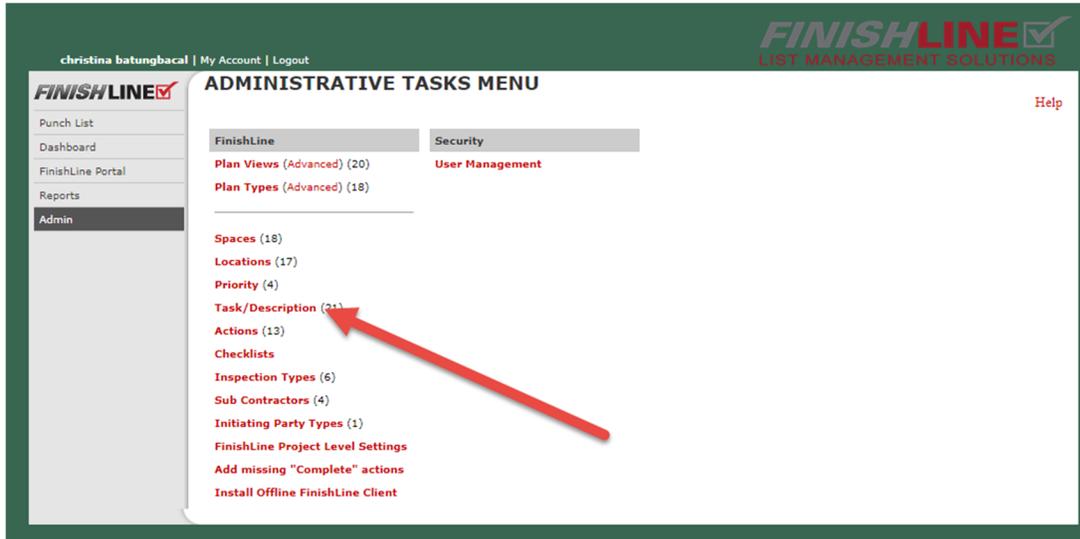
The screenshot displays the 'SUB CONTRACTOR: ZAPS ELECTRIC CO.' form in the FinishLine application. The form is set against a dark green background with the FinishLine logo in the top right. On the left, a navigation menu includes 'Punch List', 'Dashboard', 'FinishLine Portal', 'Reports', and 'Admin'. The main content area shows the following fields and options:

- Parent:** A dropdown menu set to '<Main Sub Contractor>'. A red arrow points to this field.
- Sub Contractor Name:** Radio buttons for 'Single' (selected) and 'Multiple'. Below is a text input field containing 'Zaps Electric Co.' and a 'Description:' checkbox.
- Active:** A checked checkbox.
- Selectable?:** A checked checkbox.
- Comments:** A large empty text area.
- Available in these types:** A checked 'All' checkbox, followed by a list of checked checkboxes: Checklist, Exterior, Interior, Punchlist, Safety, and Warranty. A red arrow points to the 'All' checkbox.
- Contact Info:** A section with input fields for 'First Name' (Tom/Steve), 'Last Name' (Orr/Smith), 'Email Address' (Tom@punchlist.net;Steve@ZapsElectrical.com), 'Primary Phone', and 'Cell Phone' (808-443-4644/808-415-44). A red arrow points to this section.
- Portal Access:** A message 'No User/s Assigned to this Sub - (Save record first to create a portal user)' and a row of buttons: 'Save', 'Save & Copy', 'Save & New', 'Save & Next', and 'Cancel'. A red arrow points to the 'Save' button.

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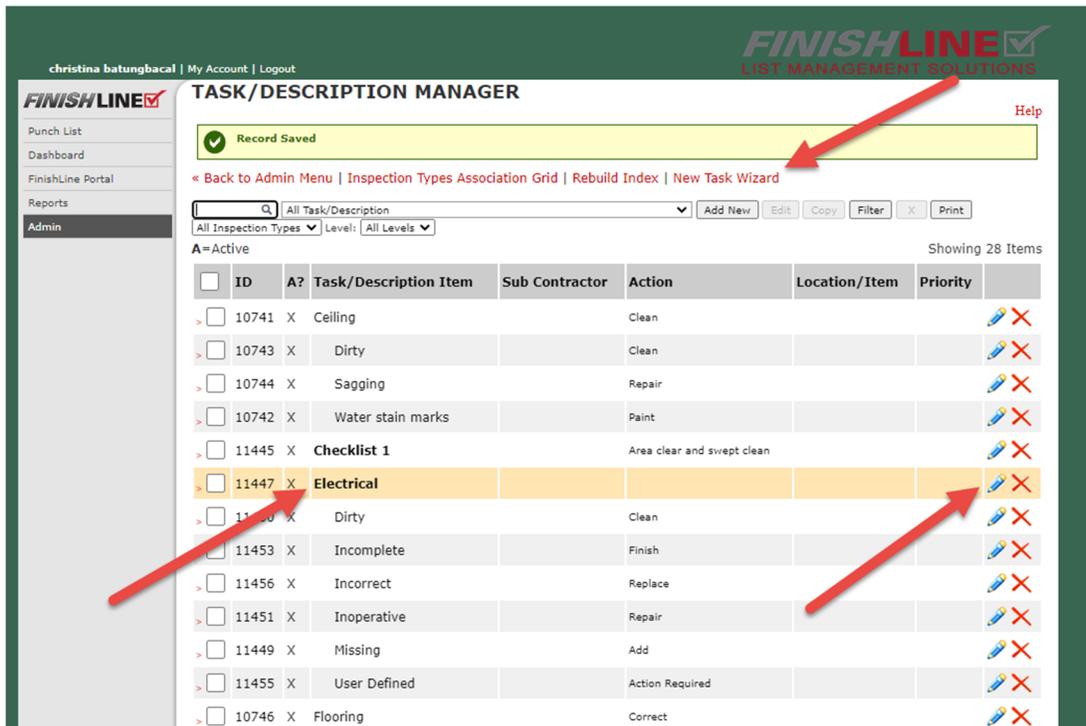
Step 2 – Adding the Subcontractor to the correct Task

From the Administrative Tasks Menu click on the Task/Description link.



Locate the Task for which this sub is responsible and click on the blue pencil.

If this task does not exist you can create it using the New Task Wizard link.



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Here you will choose the subcontractor from the Default Sub-Contractor dropdown. Then click on the Save button.

The screenshot shows the 'TASK/DESCRIPTION: ELECTRICAL' form in the FinishLine application. The form includes the following fields and options:

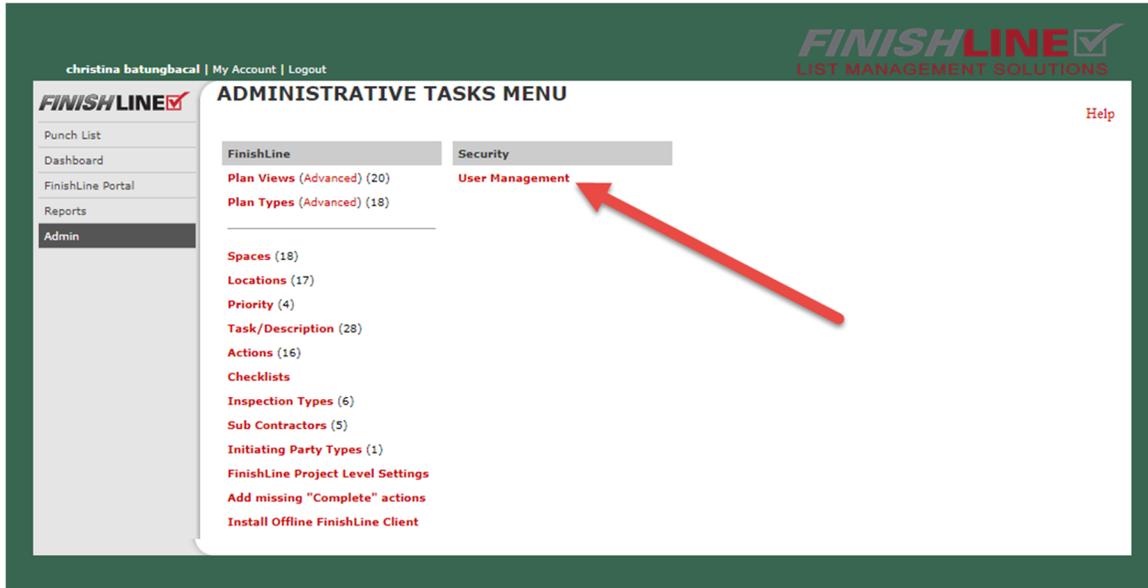
- Parent:** <Main Task/Description>
- Task/Description Name:** Electrical
- Description:**
- Active:**
- Selectable?:**
- Comments:** [Text area]
- Icon:** [Image selection box]
- Or upload new:** [Text input] [Upload File](#)
- Show Icon on Plan:** No Yes
- Default Resolution Action:** [Dropdown menu]
- Default Sub-Contractor:** Zaps Electric Co. (highlighted with a red arrow)
- Default Location/Item Type:** [Dropdown menu]
- Default Priority:** [Dropdown menu]
- Available in these types:**
 - All
 - Checklist
 - Exterior
 - Interior
 - Punchlist
 - Safety
 - Warranty

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

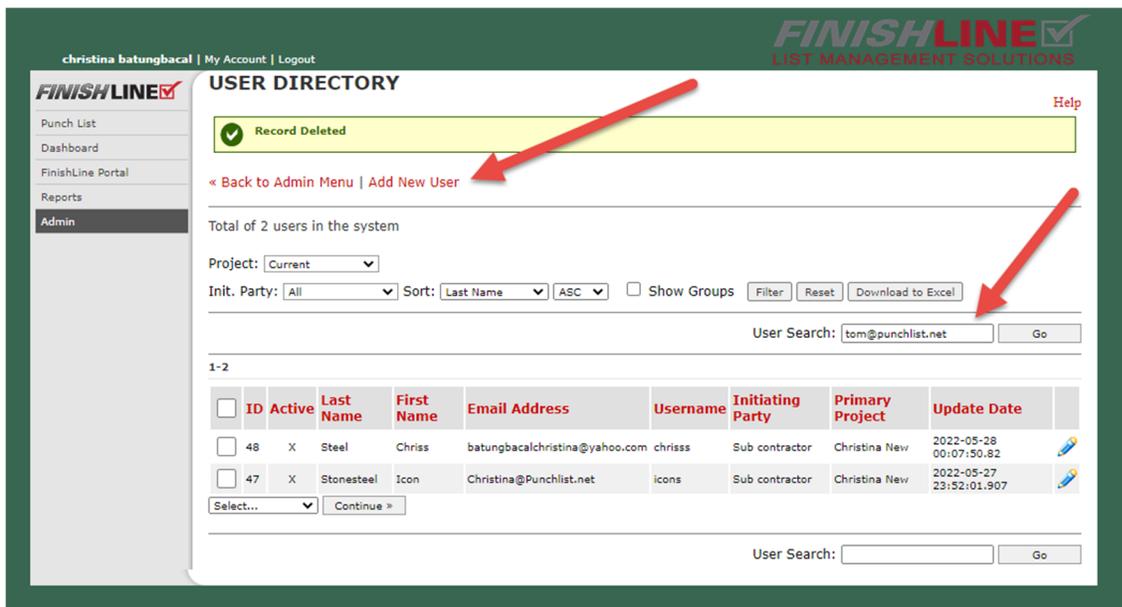
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Step 3 – Creating a login for the new subcontractor

From the Administrative Tasks Menu click on the User Management link.



From the User Directory menu, input their email address into the User Search: box. This will verify they are not already in the system. If No Users Found for this email address, click on the Add New User Link.



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Add the Users First Name, Last Name and Email Address. Create a Username and Password. Put the Company name in the Signature field. Set the Default Initiating Party Type to Subcontractor. Select the group permission of Project – Portal User (sub). Click Save.

christina batungbacal | My Account | Logout

FINISHLINE ✓
LIST MANAGEMENT SOLUTIONS

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USER: Help

User Information

First Name: Tom

Last Name: Orr

Email Address: tom@punchlist.net

Username: tomo

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

Signature: FinishLine

Default Initiating Party Type: Sub contractor

Active? Yes No

User of these groups:

- Project 1 - Admin
- Project 1 - Portal User (Subs)
- Project 1 - Punch User (Inspector)

Next click on the Object Access link at the top of the page.

christina batungbacal | My Account | Logout

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USER: TOM ORR Help

Record Saved

User Information

[Edit Record](#) [Master Permissions](#) [Object Access](#) [Delete User](#) [Exit](#)

First Name: Tom

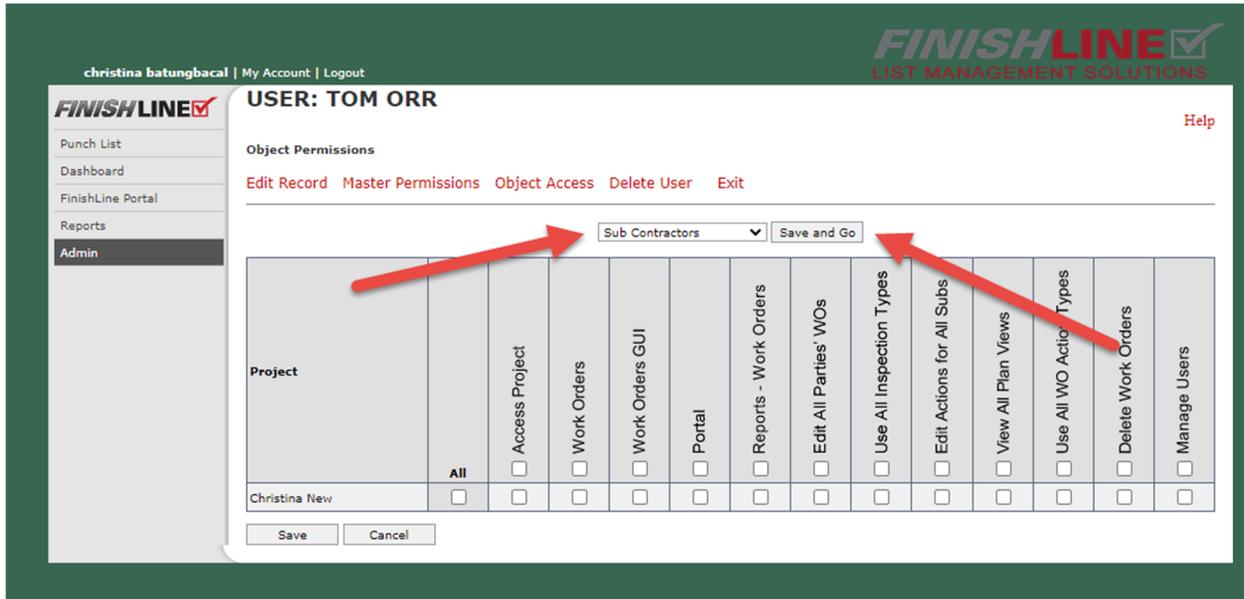
Last Name: Orr

Email Address: tom@punchlist.net

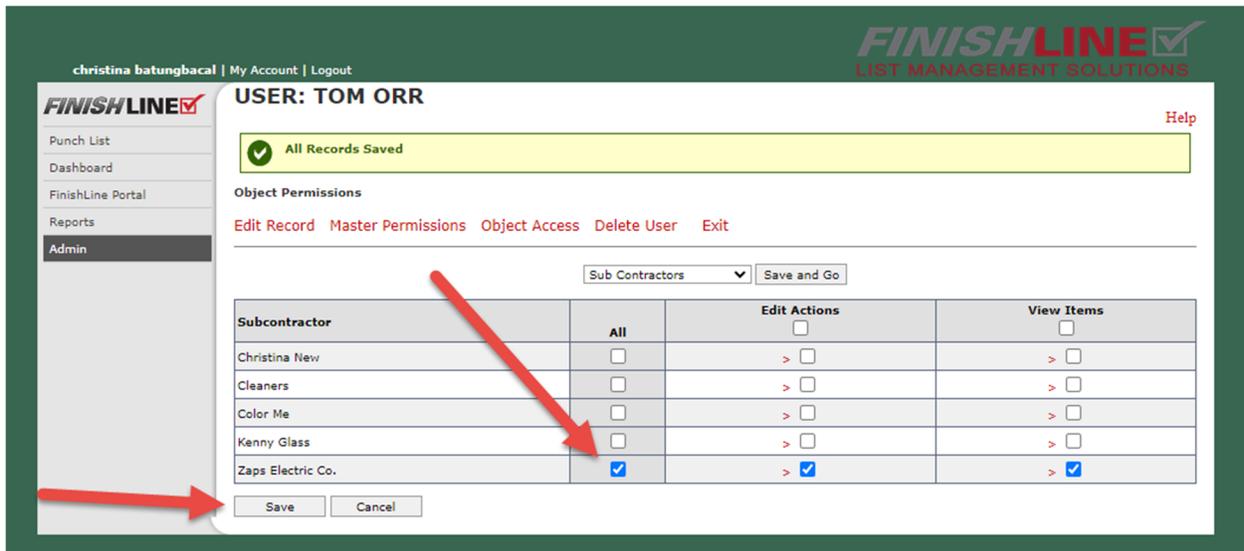
Username: tomo

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Change the dropdown box from Project to Sub Contractors and click the Save and Go button.



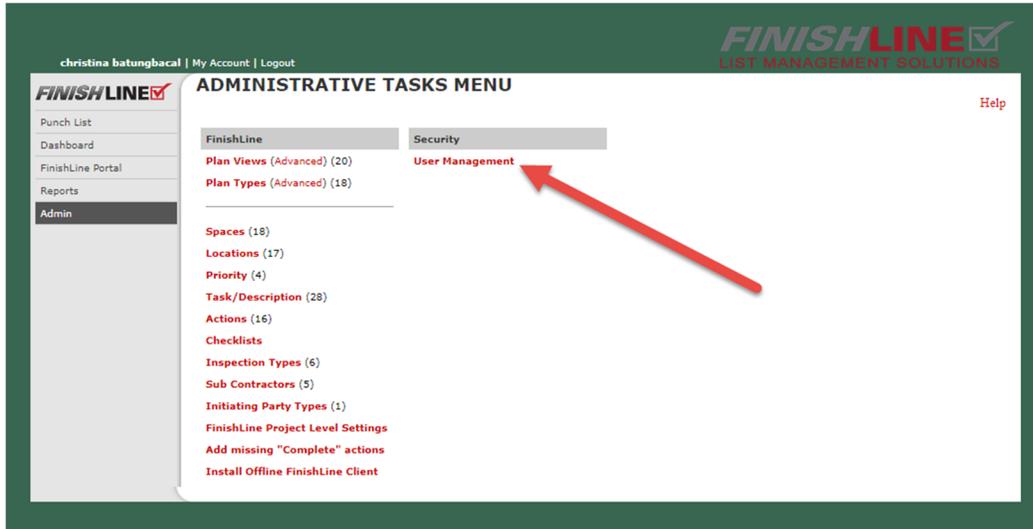
On this page you will checkmark the All Box for the company whose items they should be able to see. Then click the save button.



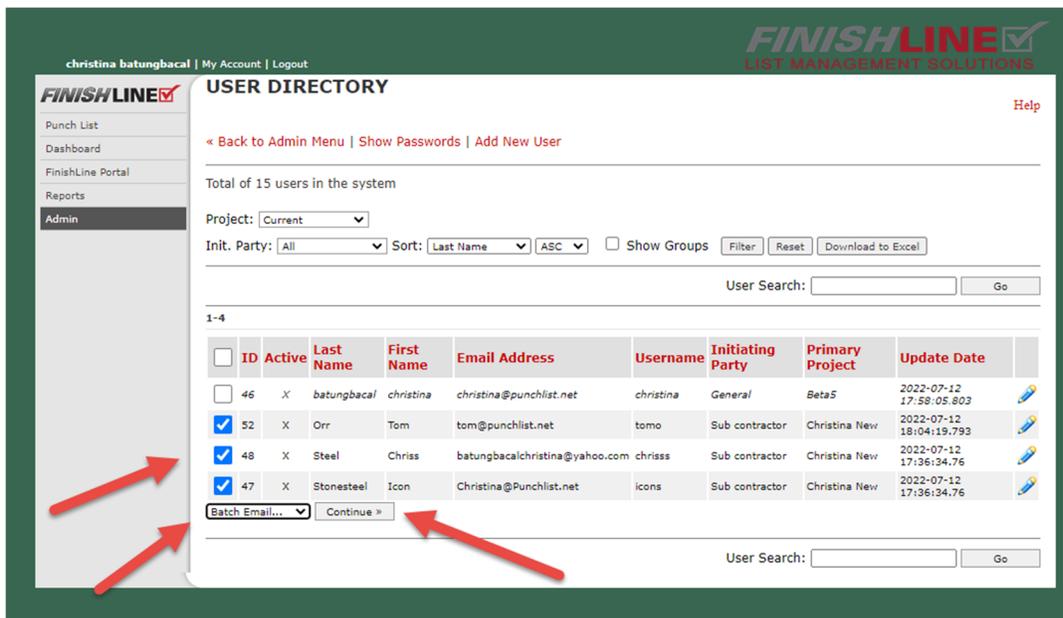
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Step 4 – Emailing the login credentials to the subcontractor

Click on the User Management link.

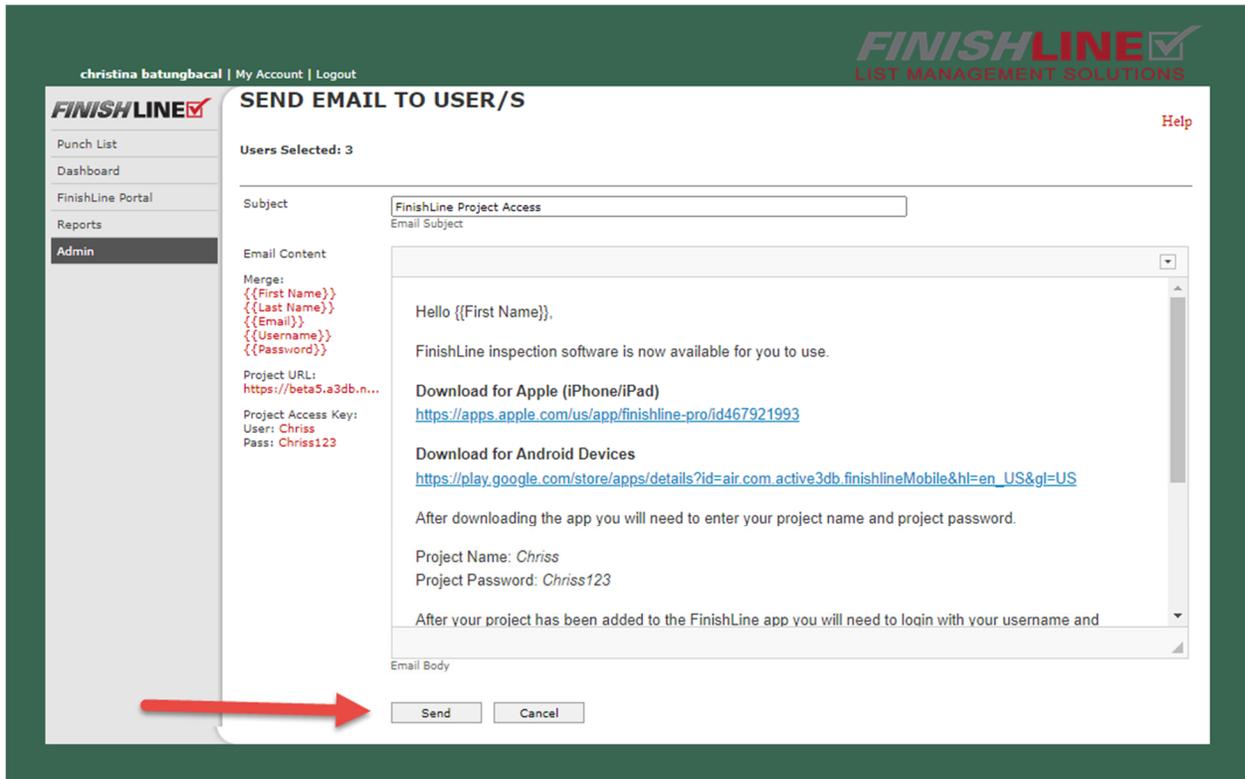


In the User Directory menu, Put a checkmark in the box to the left of the user(s) who you wish to email with their login credentials. Then change the dropdown selection from Select... to Batch Email... and click continue.



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From here you can edit or add to the email before it goes out. Or just send it as is.



Any questions? Email support@punchlist.net or call 1-888-869-8685