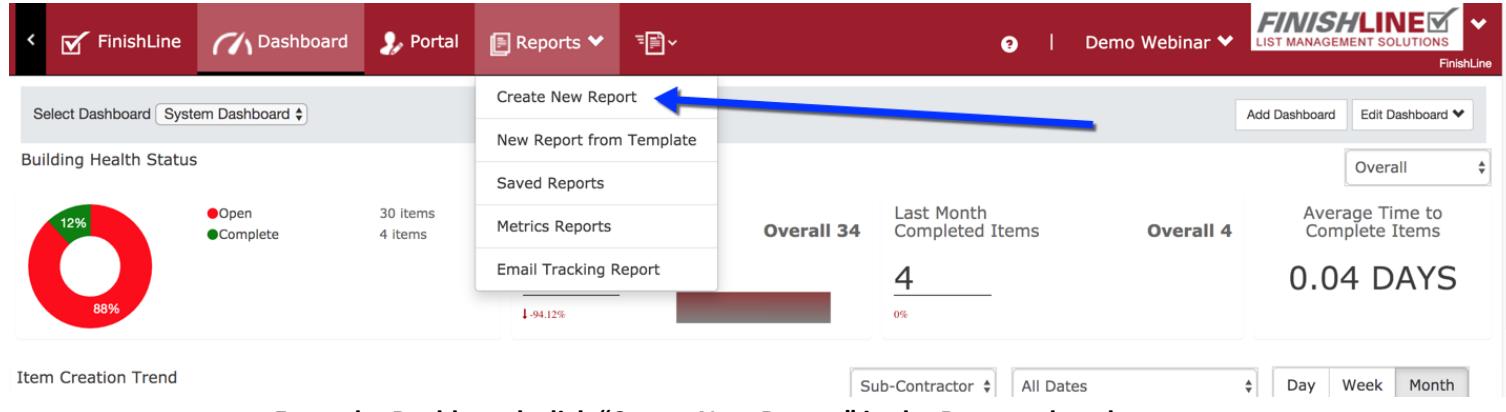


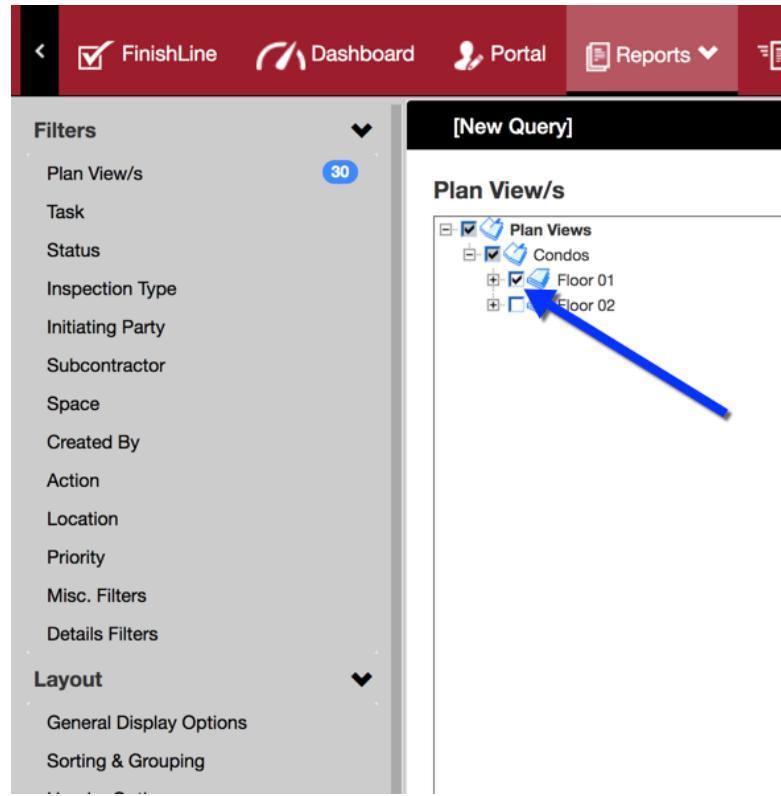
**NOTE: There are many different types of custom reports you can create, but this example will demonstrate how to create a report for ALL items for a single subcontractor in a given month.**



The screenshot shows the FinishLine dashboard interface. At the top, there is a navigation bar with 'FinishLine' (with a checkmark icon), 'Dashboard', 'Portal', 'Reports' (with a dropdown arrow), and 'Demo Webinar'. On the right side of the dashboard, there are several metrics: 'Overall 34' (with a donut chart showing 12% Open and 88% Complete), 'Last Month Completed Items' (Overall 4), 'Average Time to Complete Items' (0.04 DAYS), and an 'Item Creation Trend' chart. Below these metrics, there is a dropdown menu for 'Create New Report' with options: 'New Report from Template', 'Saved Reports', 'Metrics Reports', and 'Email Tracking Report'. A blue arrow points to the 'Create New Report' option in the dropdown menu.

**From the Dashboard, click “Create New Report” in the Reports dropdown menu.**

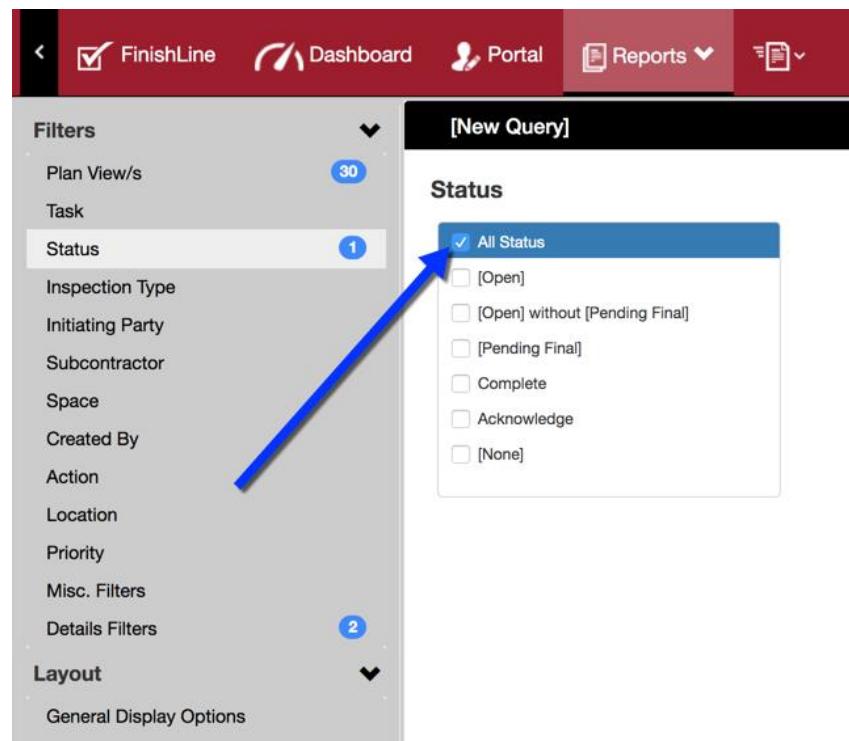
**Choose the project area for your report.**  
**We've selected the first floor in a Condo project.**



The screenshot shows the 'Filters' section of the 'Plan View/s' dropdown menu. The menu is titled '[New Query]'. On the left, there is a list of filter categories: Plan View/s, Task, Status, Inspection Type, Initiating Party, Subcontractor, Space, Created By, Action, Location, Priority, Misc. Filters, Details Filters, Layout, General Display Options, and Sorting & Grouping. On the right, there is a tree view for 'Plan View/s' with 'Plan Views' expanded, showing 'Condos' and 'Floor 01' selected. A blue arrow points to the 'Floor 01' checkbox in the tree view.

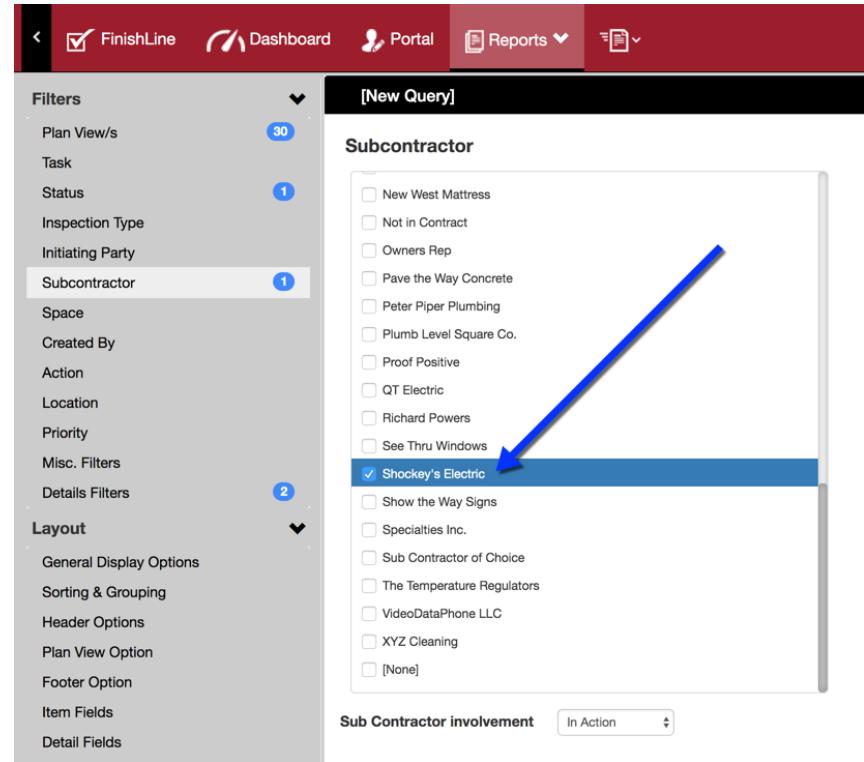
For this particular example, this report will show ALL items for a single sub.

Select the Status filter, then select the box for "All Status".



The screenshot shows the 'Status' filter dropdown open. The 'All Status' checkbox is selected, indicated by a checked box and a blue background. Other options like '[Open]', '[Pending Final]', and '[None]' are also listed but not selected.

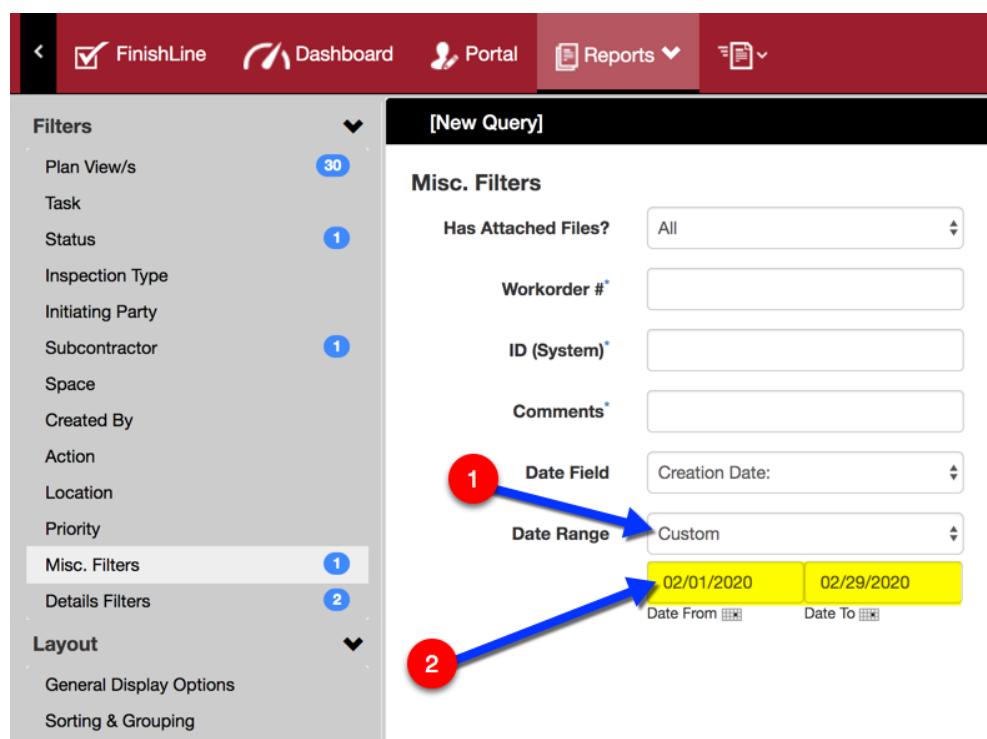
Select a subcontractor. We're going to choose an electrician.



The screenshot shows the 'Subcontractor' filter dropdown open. The 'Shockey's Electric' checkbox is selected, indicated by a checked box and a blue background. Other subcontractors listed include 'New West Mattress', 'Not in Contract', 'Owners Rep', 'Pave the Way Concrete', 'Peter Piper Plumbing', 'Plumb Level Square Co.', 'Proof Positive', 'QT Electric', 'Richard Powers', 'See Thru Windows', 'Show the Way Signs', 'Specialties Inc.', 'Sub Contractor of Choice', 'The Temperature Regulators', 'VideoDataPhone LLC', 'XYZ Cleaning', and '[None]'. A blue arrow points to the 'Shockey's Electric' option.

From the “Misc. Filters” tab you’ll need select a date range. We will pick dates to run a report for the month of February.

- 1) Select “Custom” from the “Date Range” dropdown menu.
- 2) Then select the custom dates, we’ve picked the range of first day in Feb – the last day in Feb.

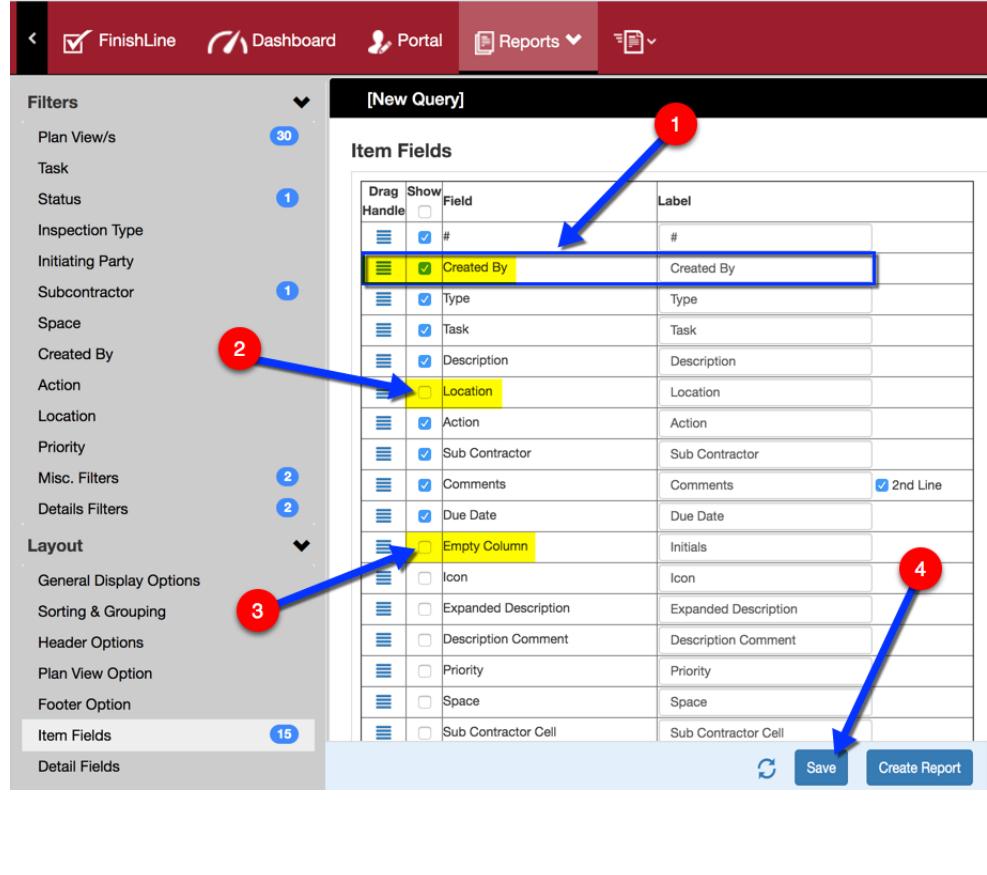


**Misc. Filters**

- Has Attached Files? All
- Workorder #\*
- ID (System)\*
- Comments\*
- Date Field: Creation Date
- Date Range: Custom
- Date From: 02/01/2020
- Date To: 02/29/2020

Let's make a few last edits on the Item Fields tab.

- 1) Scroll down and select the “Created by” option. Use the Drag handle to bring it to second place in the “Item Fields” list.
- 2) Unselect the “Location”.
- 3) Unselect the “Empty Column”.
- 4) Now Save the report.



**Item Fields**

Drag Handle	Field	Label
<input checked="" type="checkbox"/>	#	#
<input checked="" type="checkbox"/>	Created By	Created By
<input checked="" type="checkbox"/>	Type	Type
<input checked="" type="checkbox"/>	Task	Task
<input checked="" type="checkbox"/>	Description	Description
<input checked="" type="checkbox"/>	Location	Location
<input checked="" type="checkbox"/>	Action	Action
<input checked="" type="checkbox"/>	Sub Contractor	Sub Contractor
<input checked="" type="checkbox"/>	Comments	Comments
<input checked="" type="checkbox"/>	Due Date	Due Date
<input checked="" type="checkbox"/>	Empty Column	Initials
<input type="checkbox"/>	Icon	Icon
<input type="checkbox"/>	Expanded Description	Expanded Description
<input type="checkbox"/>	Description Comment	Description Comment
<input type="checkbox"/>	Priority	Priority
<input type="checkbox"/>	Space	Space
<input type="checkbox"/>	Sub Contractor Cell	Sub Contractor Cell

**Buttons:**

- Save
- Create Report

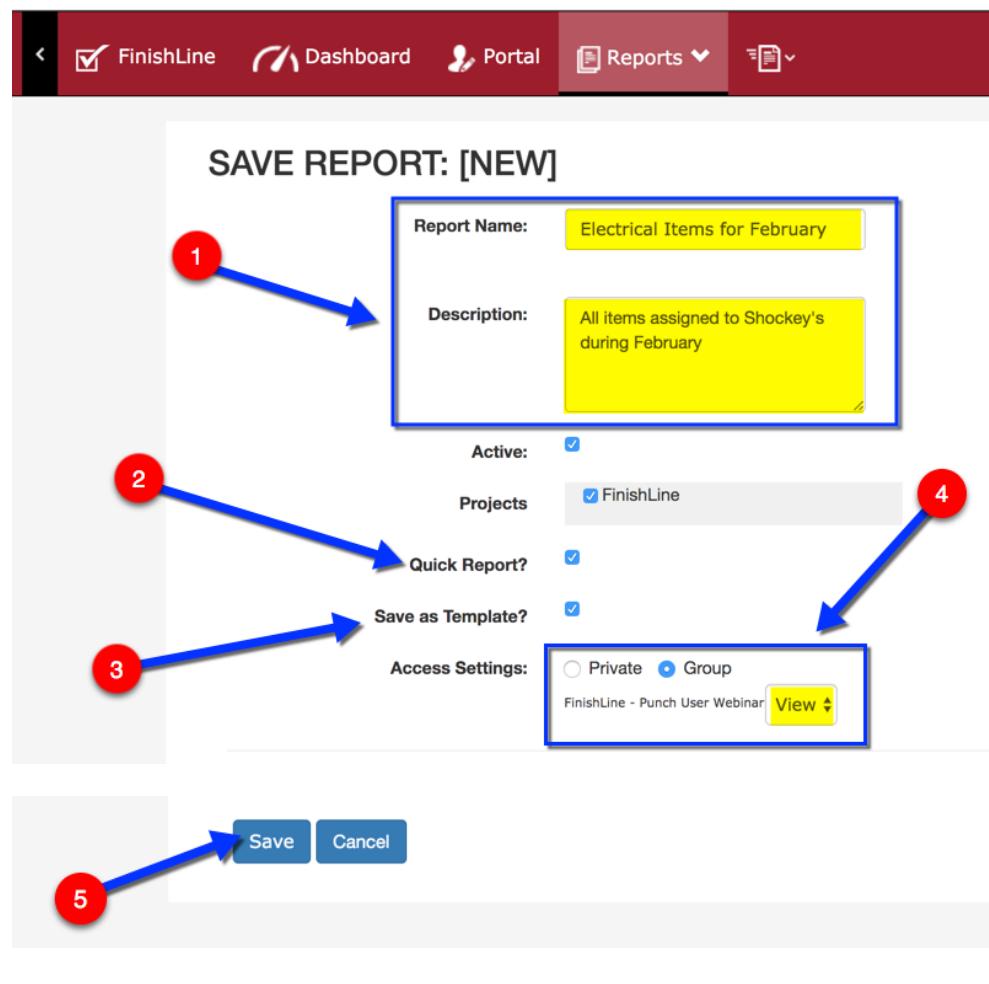
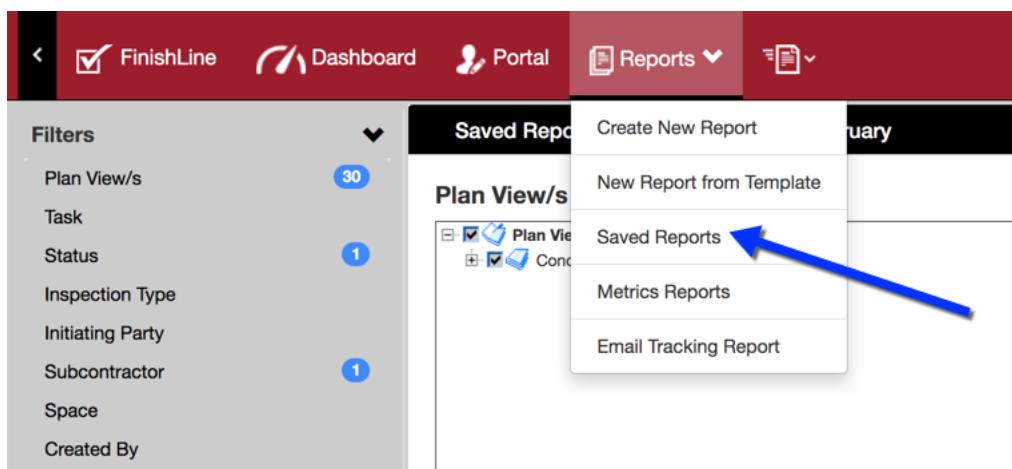
**1) Add a Report Name and Description**

**2) Select the “Quick Report” box (this will make it more accessible and easier to run in the future)**

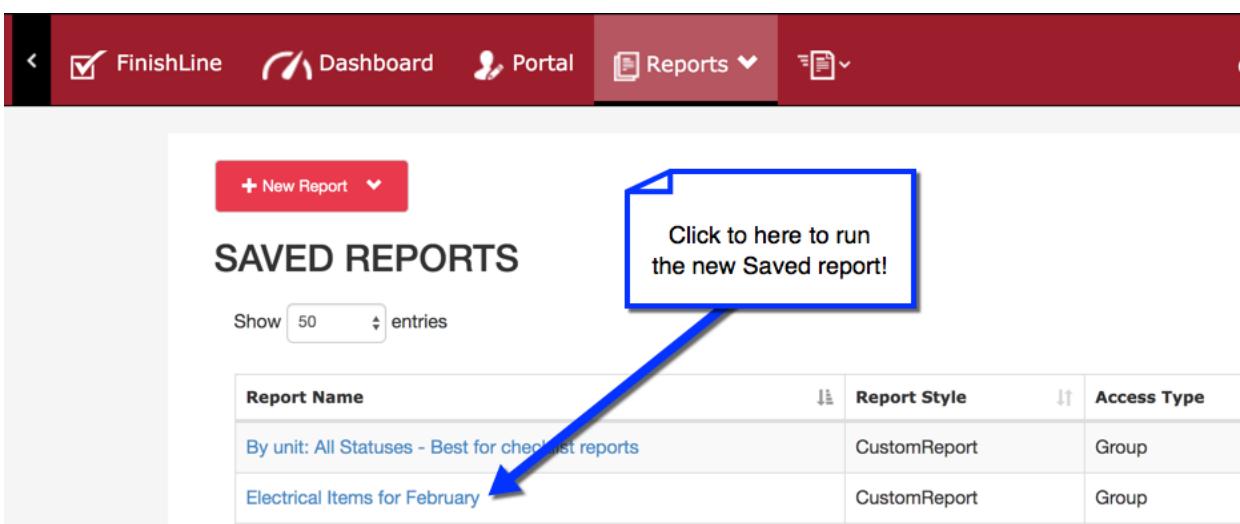
**3) Select the “Save as Template” box (this will enable you to modify the report in the future without having to make as many selections)**

**4) Select the “Access Settings” for the report. (“Private” limits the report to you. If you want to share it, select the “Group” option and make your selections from the dropdown menu.)**

**5) Scroll down the page and Save it.**

Now that the custom report has been created and saved. It is now accessible via Saved Reports.



Click to here to run the new Saved report!

Electrical Items for February

Click the Report name link in the Saved Reports section to run the new report.



FINISHLINE   
LIST MANAGEMENT SOLUTIONS

FinishLine

Produce or Email Report... 100%

02/26/20

Condos / Floor 01 / 101 (Type A\_R) - Shockey's Electric

#	Created By	Type	Task	Description	Action	Sub Contractor	Due Date
2	DW	1-Interior	Elect - Power/Lighting (T)	Inoperative	Repair/Replace	Shockey's Electric	3/2/20
			Repair/Replace	3/2/20	Shockey's Electric		
3	DW	1-Interior	Elect - Power/Lighting (T)	Inoperative	Repair/Replace	Shockey's Electric	3/2/20

Viola! There is the new saved report. Produce, email, view, etc. as you wish.