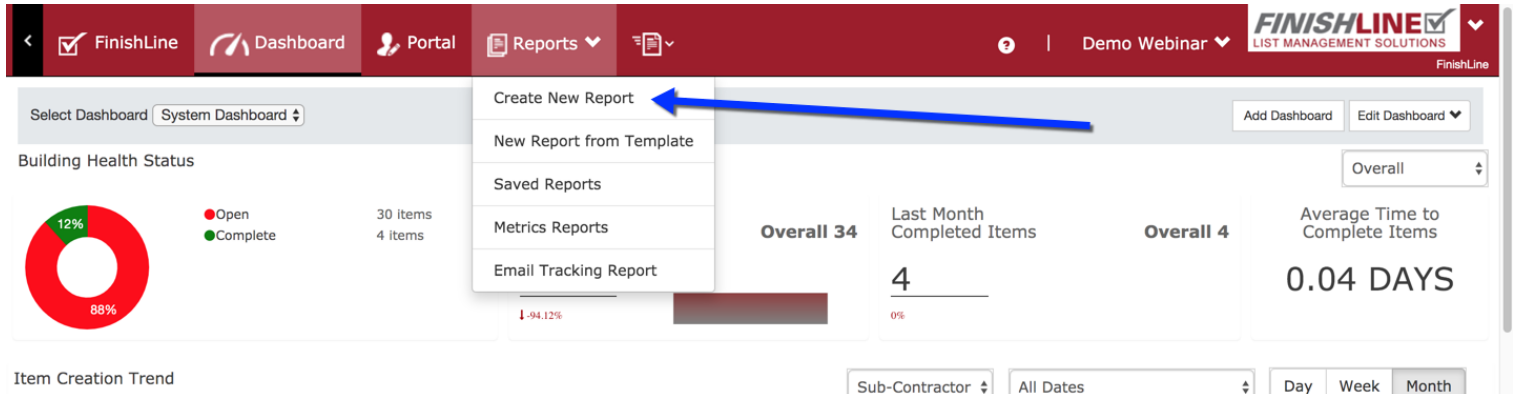**FINISHLINE**
LIST MANAGEMENT SOLUTIONS

**NOTE: There are <u>many different</u> 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.**
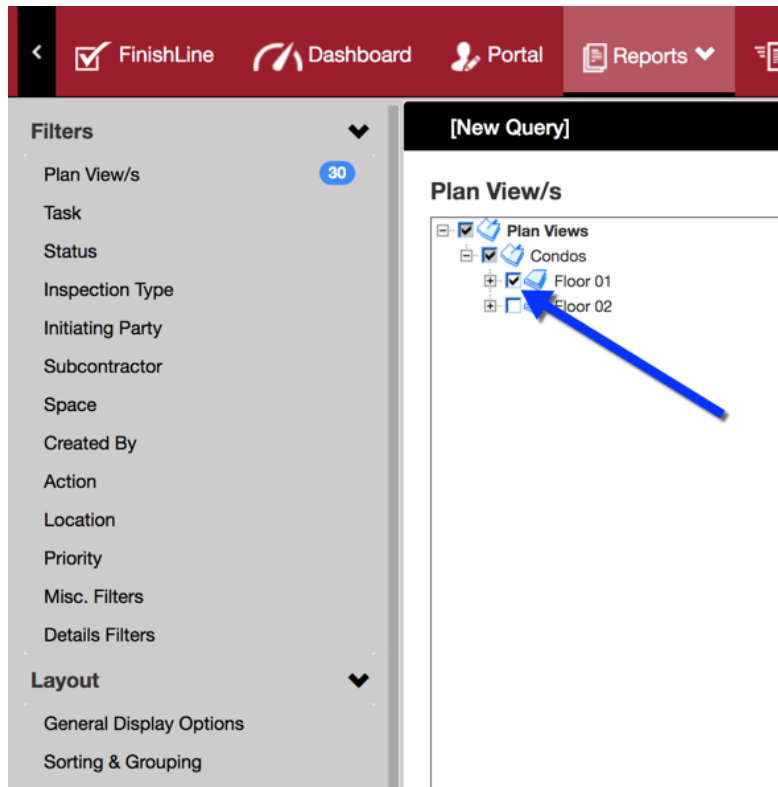

From the Dashboard, click "Create New Report" in the Reports dropdown menu.

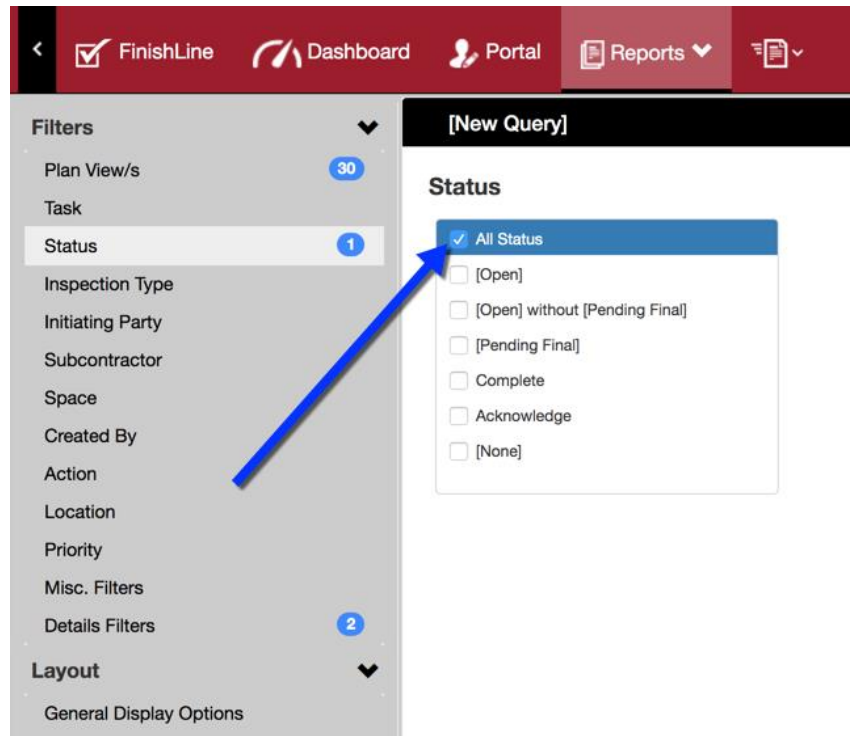**Choose the project area for your report.**

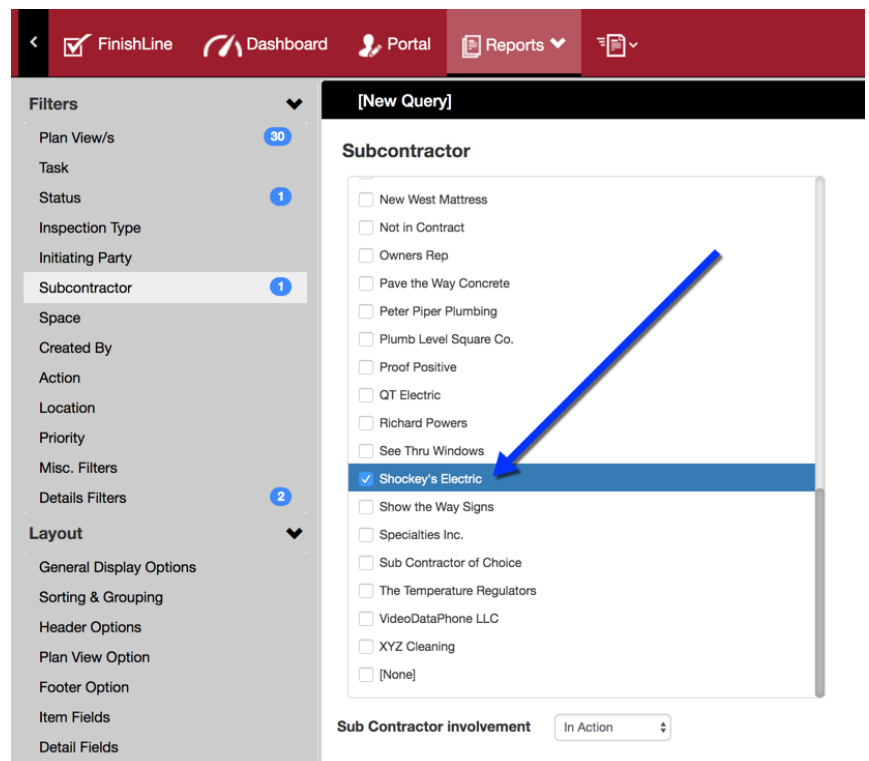**We've selected the first floor in a Condo project.**

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

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.

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.

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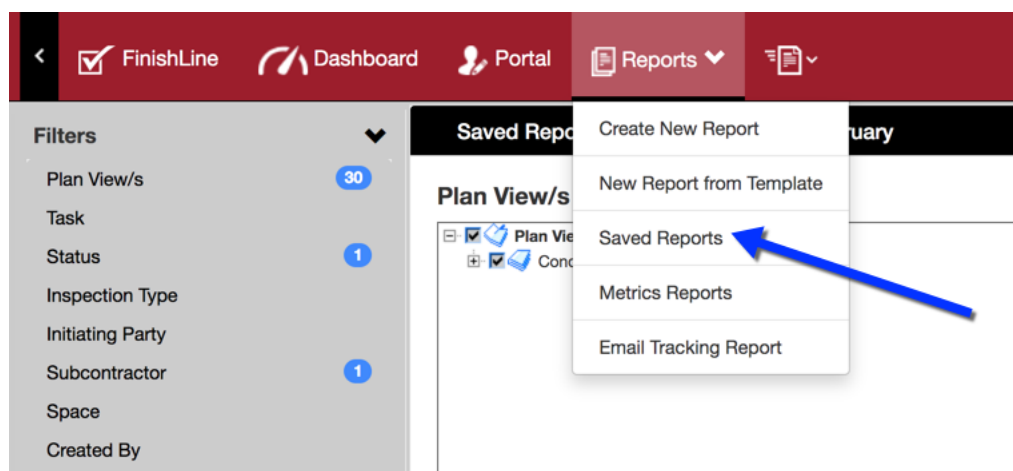
5) Scroll down the page and Save it.

SAVE REPORT: [NEW]

Report Name: Electrical Items for February

Description: All items assigned to Shockey's during February

Active: ☑

Projects: ☑ FinishLine

Quick Report? ☑

Save as Template? ☑

Access Settings: ○ Private ● Group
FinishLine - Punch User Webinar View ⬍

Save Cancel

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

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

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

Have questions or need more information? Please email support@punchlist.net