Creating a Punch List

A punch list refers to a list of repairs and incomplete work items remaining at the end of a project. These items must be finished before the contractor may receive final payment.
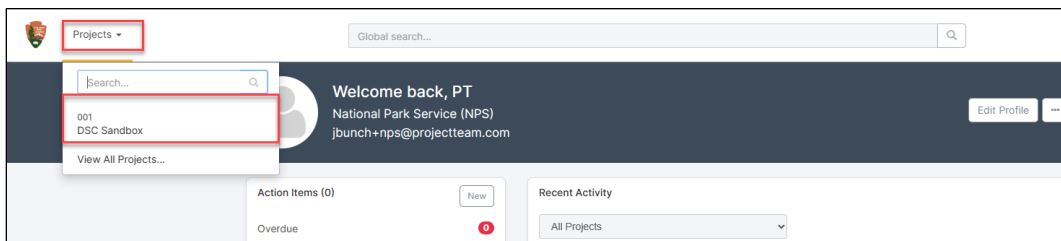
Creating a Punch List
Edit the Punch List Items
Related Resources
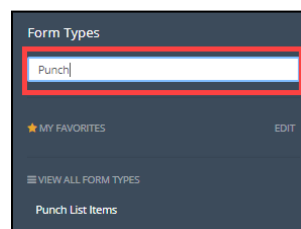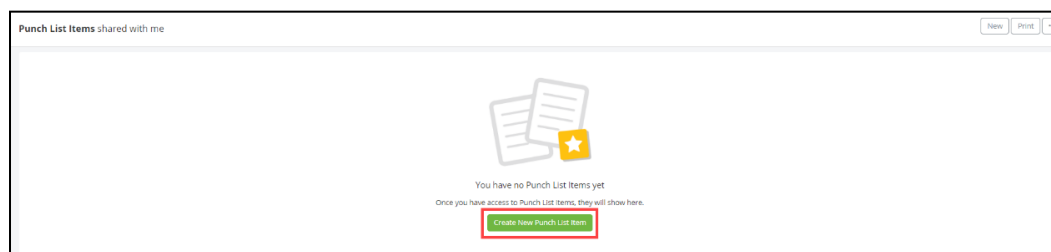
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1. Open the project.

2. Begin typing "punch list" in the **Search box** or click the **View All Form Types** section to expand the list of form types. Scroll through the list and click **Punch List Items**.


3. If this is the first punch list item for the project, click the **Create New Punch List Item** button located in the middle of the Punch List Items log page.
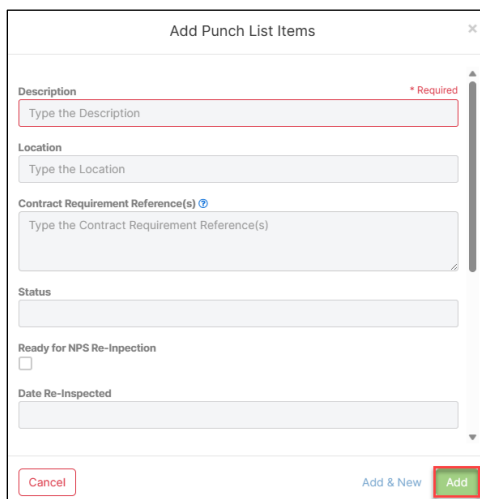
Otherwise, click the **New** button located in the top right corner.

4. The Punch List Items form will open. Enter the required and any additional information. Required fields are: **Punch List #**, **Punch List Title**, and **Originator**.
5. In the Punch List Items collection, click **Create New**.
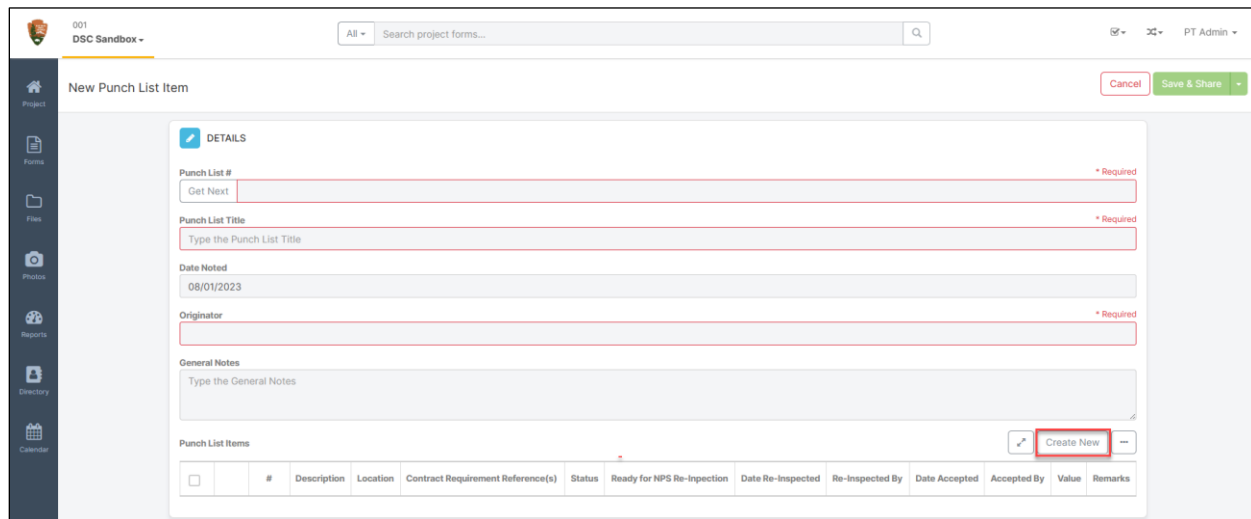
6. Enter the **Description** and any other information regarding the item in the *Add Punch List Items* window and then **Add** or **Add New**.

7. Click the dropdown arrow beside the **Save & Share** button located in the top right corner. Click **Save & Share** to save the document and share with other team members or click the **Save** button to save without granting access to the punch list item.

Edit the Punch List Items

1. In the Punch List Items log, click a **punch list Items subject hyperlink** to open the document.

2. The Punch List Items document will open. To add additional information about the Punch List Items, click the **Edit** button in the Details section.

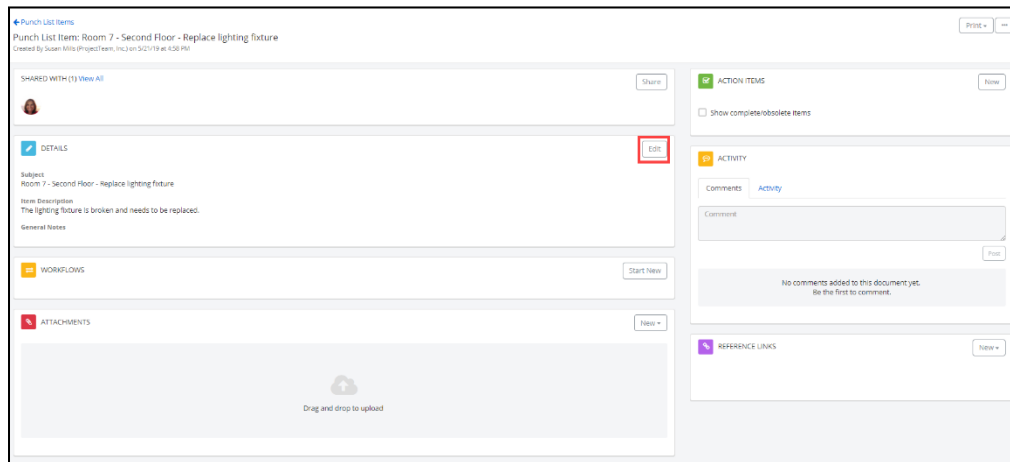3. Click the dropdown arrow beside the Save & Share button located in the top right corner. Click Save & Share to save the document and share with other team members or click the Save button to save without granting access to the Punch List Items.

Related Resources

- **Help Center Links**
  - [Create Punch List Items (projectteam.com)](projectteam.com)
  - [Edit Punch List Items (projectteam.com)](projectteam.com)
- **Quick Reference Guides (QRGs) and Training Videos**
  - Project Directory
  - Sharing Records
  - Adding Attachments
  - Creating Action Items
  - Making Comments
  - Adding Reference links
  - Running Reports
  - File Management Overview
  - Photo Management

- o Managing Punch Lists
- o Completing Punch List Items