

New Job Checklist

Customer name / address:

Job sale date:	Job #:
Salesperson:	Job superintendent:
Contract amount:	Allowance amounts:

Manager review:

- Contract & job # _____
- Down payment _____
- Allowances _____
- Selections _____
- Estimate _____
- Layout sheet _____
- Specialty items _____
- Thank you letter _____

_____ (Manager OK)

Bookkeeping:

- Check all math _____
- Check pay schedule _____
- Job set up _____

_____ (Bookkeeping OK)

Job Superintendent:

- Read contract _____
- Check estimate _____
- Check allowances _____
- Check selections _____
- Check special orders _____
- Check layout sheet _____
- Confirm subs at layout _____
- Schedule permit appointment _____
- Schedule plans _____
- Confirm start date _____

_____ (Superintendent OK)

Salesperson:

- Thank you note _____
- Confirm layout date w/owner _____
- Check all forms complete _____

_____ (Sales OK)

Projected job start date: ____ / ____ / ____
Projected job completion date: ____ / ____ / ____