MotionOps

CONTRACTOR SCALER HUB · BUILD A JOB WORKFLOW FROM REQUEST TO PAYMENT

Job Closeout Checklist

One per job, between "the crew is done" and "the invoice goes out". The crew lead runs part 1 on the last day, before leaving; the office runs part 2 before it invoices.

JOB

LAST DAY OF WORK

FIELD PART: CREW LEAD

OFFICE PART: OFFICE COORDINATOR, WITHIN ____ WORKING DAYS

1. Field part: before the crew leaves

Check	What complete means	Done	Notes
Work status	Everything in the approved scope is finished, or the open items are listed below with a date and a person		
Evidence	Finished-work photos on the job; the customer's sign-off, if you take one		
Time	Every hour on the job is on a timesheet, including the last day		
Materials and costs	Every receipt, return and rental for the job is recorded		
Changes	Ask the crew lead: "Did you agree to anything with the customer that isn't written up?" Anything agreed on site is written up and signed before the crew leaves		

Open item: a date and a person on every one	Who	By when
Example Install the replacement cabinet door when it arrives (on back order)	Crew 2	Next week

2. Office part: changes and invoice

This is where unbilled money hides. Compare the change order log with the job's notes, photos and the crew lead's answer above. Every change is signed, then either on the invoice or marked no charge on purpose.

Change	Found in: log, notes, photos, crew lead	Signed	On the invoice or no charge	Amount
Example One outlet by the island, under the crew lead's limit, not written up	Crew lead, Friday: written up and signed on the spot	Fri	On the invoice	
Example Half a day of extra prep, wall in poor condition	Agreed by text only: office wrote it up	Mon	On the invoice	

Invoice ready: the amount matches the original scope plus approved changes, minus deposits already paid.

	Amount
Original scope	
+ Approved changes	
- Deposits and progress payments already paid	
= Invoice amount	

- [ ] Every change order signed
- [ ] Every change on the invoice or marked no charge
- [ ] Every receipt, return and rental in the job's costs
- [ ] Deposits and progress payments taken off
- [ ] Return visits or warranty items scheduled
- [ ] Signed changes attached to the invoice
- [ ] Invoice sent on: _____

YOUR TRADE'S OWN CLOSEOUT DOCUMENTS (PERMITS CLOSED, WARRANTIES REGISTERED, MANUALS HANDED OVER)

3. Close the loop: actual costs against the estimate

While the numbers are fresh. You don't need a full analysis for every job; one line on the job is enough.

	Estimated	Actual	Difference
Hours			
Materials			

Example from the lesson: "Prep took a day longer than estimated, wall in poor condition." Over a few months, those lines show which estimates keep running short.

ONE LINE FOR THIS JOB

What to review: every job that finishes in the next two weeks

Job	Last day of work	Invoice-ready	Days	Reached the office missing: time, receipts, change orders	Changes found at closeout, not on the first invoice draft