Contractor operations quick start

Use one workbook to track each job from the first inquiry through final payment and closeout. The Word files turn the checked record into practical forms and customer-ready drafts.

Start with the fictional Cedar Lane porch repair example, then make a clean working copy for your business. All example people and records are invented; the sample customer is Example Customer and any example email uses the .invalid domain.

Set up before using real records

- Create one controlled working folder in your approved Microsoft 365 location. Keep Contractor_Operations.xlsx and the related job folders together. Limit access to the people who need it.
- Open Home, then Settings. Set company, currency, owner and the reporting date in B6. Overdue checks and the review queue use this date, so refresh it when reviewing. Verify tax rates on estimates and changes; zero is only the starting value.
- Read the example records across the workflow tabs, including VendorChecks. Keep a separate untouched copy of the sample kit for training.
- Edit pale-yellow input cells; preserve gray calculated columns. Headers are on row 5 and data begins on row 6. Each table has 100 prepared rows. Use Excel table rows, preserve formulas and validation, and test before expanding beyond this capacity.
- Replace or remove sample rows in the working copy only after understanding their relationships. Never reuse a removed example ID for a real record. Assign one ID owner and keep one current workbook.

What is ready and what needs setup

Ready to use Editable Word templates and the Excel workflow. Enter and review the data yourself. Word placeholders are plain text and do not pull values from Excel.

Needs your configuration Company details, tax choices, permissions, real recipients, approved terms, payment instructions and any Microsoft 365 automation described elsewhere in the kit.

No live sends or purchases Opening the files does not send customer messages, take payments or enable cloud flows. Review the separate integration guidance before connecting services.

Suggested working folders

Keep a Templates folder for clean masters. For each job, use a folder named with the JobID and a short job name. Inside it, keep scope and estimates, field records and photos, changes, billing and closeout evidence. Paste the relevant links into the workbook where supported.

Before sharing any file, remove template instructions and all {{placeholders}}, verify the recipient, and check whether the file contains internal notes.

Follow the job from lead to closeout

Keep the record IDs attached to every document, approval and payment so the history remains easy to follow.

1 Capture and qualify

Create the Leads row and use the lead and site visit form. Record the customer, requested work, owner and next follow-up date. Put uncertain site conditions in the notes rather than guessing.

2 Price and review

Create the estimate header and its EstimateLines rows with the same EstimateID. Check quantities, unit prices, tax and total. Use the estimate Word form for scope and exclusions. Keep revisions and approval evidence.

3 Release and deliver

Create or update the Jobs record using the approved estimate. Complete the kickoff checklist before work starts. Duplicate the daily log page for each workday and save photos and receipts in the job folder.

4 Control changes

Create one Changes row for each proposed change. Record the price and schedule deltas. Get the required customer and owner approvals before the affected work starts, then retain the evidence.

5 Bill and reconcile

Create the Invoices row from approved billable work. Check for prior billings. Review and issue the Word invoice through your normal process. Record every payment against its InvoiceID. Only Cleared entries affect balances; append corrections and refunds rather than rewriting reconciled history. Verify any vendor payment-detail change through the separate callback process before payment.

6 Close and follow through

Use the punch list and Closeout row. Resolve open items, deliver the handover information and reconcile billing. Send a reviewed request for honest feedback when appropriate.

Daily and weekly routine

Daily Review follow-ups, current jobs, changes waiting for approval and overdue balances. Update dates and ownership after each meaningful event.

Weekly Review Checks, missing approvals, old open items and workbook access. Reconcile recorded payments to your actual payment records. Keep a dated backup and use version history where available.

Use stable IDs and matched files

IDs are typed once and remain unchanged. They are not row numbers, names or formulas. Sorting the workbook must never change an ID.

Record	Training ID	Where it belongs
Lead	LD-2026-0001	Leads and intake form
Customer	CU-2026-0001	Related customer records and documents
Job	JB-2026-0001	Jobs and every job document
Estimate	ES-2026-0001	Estimates, EstimateLines and scope form
Change	CO-2026-0001	Changes and approval record
Invoice	IN-2026-0001	Invoices, Payments and invoice
Payment	PY-2026-0001	Payments and reconciliation evidence
Closeout	CL-2026-0001	Closeout and punch list
Vendor check	VC-2026-0001	VendorChecks and callback record

For manual entries, use the matching prefix, year and next unused sequence under one owner’s control. Preserve staged IDs from the intake recipe exactly; do not renumber them. Check for duplicates before saving. Reuse an existing customer or job ID when the record already exists. Create a new payment ID for each payment entry and a new RequestID for each vendor-check request.

Choose the right Word file

File prefix	Use it for	Workbook tabs
01 Lead Site Visit	Inquiry, observations and follow-up	Leads
02 Estimate Scope	Scope, price and decision record	Estimates, EstimateLines
03 Job Field Log	Release checklist and daily log	Jobs
04 Change Review	Price, schedule and approval record	Changes
05 Invoice Reminders	Invoice and owner-reviewed wording	Invoices, Payments
06 Closeout Review	Punch list, handover and review draft	Closeout, Jobs
07 Vendor Verification	Callback and owner decision record	VendorChecks

The supplied filenames contain the training IDs. Copy a template, rename it with your actual IDs and fill the matching {{ID}} fields inside the document. Do not rename an existing record’s ID when a customer name or job title changes.

Example daily log filename JB-2026-0001_FieldLog_2026-10-17.docx. Use YYYY-MM-DD dates and simple descriptive filenames.

Check the records before sharing

Excel is the source for totals and status. Word is the reviewed presentation of the record. Recheck any Word copy after the source record changes.

Copy values carefully

- Match LeadID, CustomerID, JobID and the document-specific ID before copying anything. Confirm the scope revision and approval evidence.
- Copy the relevant checked totals and currency from Excel. Word totals, balances and dates are plain text and do not update or calculate.
- Check the example: estimate 1,800 plus approved change 250 equals job value 2,050. Invoice IN-2026-0001 is 600 and fully paid; IN-2026-0002 is 1,450 and unpaid. Total balance is 1,450, with zero example tax.
- Use actual dates as dates in Excel. Search each completed Word file for {{ and }} and replace every unresolved placeholder before sharing.
- Remove owner instructions and workbook-update notes from customer copies. The invoice file includes owner-only reminder guidance on page 2; prepare only intended customer-facing pages for issue.

Use the workbook checks

Review Checks and row Attention flags after entering or editing records. Investigate duplicate IDs, missing links and other flagged exceptions before issuing a document or closing a job. The checks help spot mistakes; they do not validate legal terms, tax treatment, site conditions or payment receipt.

Add automation safely

Optional setup starts in automation/INSTALL.md. The supplied getOwnerReviewQueue.ts script reads review items; flow-blueprint.json describes the flow. Configure connections and locations before testing. Nothing is installed or running just because these files exist.

Begin with copies and fictional records. Forms intake stages in a private SharePoint list for owner review and manual copy into Leads. The owner-review queue does not send customer email or approve payment changes. Keep a controlled writer, duplicate-event checks and a manual fallback.

Never store passwords, API keys, payment-card details or bank-login credentials in the workbook or documents. Keep payment instructions in your approved process and verify changes through a trusted channel.

Run a short acceptance test

[ ] Add one fictional lead, estimate and job. Confirm every linked ID stays unchanged after sorting.

[ ] Enter a proposed change and verify it is not treated as approved work before the required review.

[ ] Create an invoice, record a partial payment, then verify the remaining balance and reminder wording.

[ ] Complete the punch list and check that unresolved work or an unpaid balance is still visible.

[ ] Save a copy, reopen it, review Checks and confirm that the documents match the current workbook.