



FREE GUIDE

Keep records that get you paid

What to write down, how to track it, and why it decides who wins when money is on the line.

Why records decide who gets paid

When there's an argument about money, the side with better records usually wins. It doesn't matter how right you are if you can't show it.

Good records do three things for you:

- **Get extra work paid.** You can prove what changed, when, and what it cost.
- **Stop surprises.** You see a job going over budget while there's still time to fix it.
- **Back up a claim.** If a job goes sideways, you have the facts ready instead of rebuilding them from memory months later.

None of this needs fancy software. It needs the same few things written down every day, and someone who keeps it up.

Daily records

A daily log takes five minutes and is the most useful thing you'll ever write. Do it every day, on every job, even the boring ones.

Write down:

- **Who was there:** your crew, hours each, and any subs on site
- **What equipment ran,** and for how long
- **What got done,** in plain words and quantities if you have them
- **What got in the way:** weather, waiting on others, missing drawings, site not ready
- **What anyone told you to do differently,** and who said it
- **Photos,** with the date on them

A phone note, a paper book or an app all work. What matters is that it's done the same day and kept in one place.

Records you can add up

A photo of a handwritten sheet is a record, but you can't add it up. A spreadsheet with the same information is data you can actually use.

Say a client asks how many hours went into a change, or how much rain delay you had last spring. With photos of paper, someone has to sit and retype everything first. With a spreadsheet, it takes minutes to sort, total and show.

You don't need anything fancy:

- **One row per day, or per entry.** Date, job, who, hours, equipment, what was done.
- **The same columns every time,** in the same order.
- **Numbers in their own cells.** "8" in the hours column, not "about 8 hrs" in a notes column.
- **Keep the photos too.** They're your proof. The spreadsheet is what lets you use it.

If your crew prefers paper in the field, that's fine. Just have someone type it in at the end of the week, while it's fresh.

Changes: catching extra work

Most lost money on a job is extra work that never got billed. It happens when a change is agreed out loud and nobody writes it down.

1. **Spot it.** If the work is different from the drawings, the quote or the contract, it's a change.
2. **Give notice in writing.** An email is enough. Many contracts have a short deadline for this, sometimes just days. Late notice can mean no payment.
3. **Get it approved before you start, if you can.** If you can't wait, write down who told you to go ahead.
4. **Track the cost separately.** Keep the hours, equipment and materials for the change apart from the regular work.
5. **Bill it.** Put it on your next invoice. Don't save it up for the end of the job.

Keep a simple change log: a list of every change with a number, date, description, amount and status.

Tracking costs and forecasting the finish

You should know if a job is making money while it's still running, not after it's done. That only takes a monthly check.

Once a month, for each job:

1. **Add up what you've spent so far:** labour, equipment, materials, subs.
2. **Compare it to your budget** for the work that's actually done.
3. **Estimate what's left to spend** to finish.

4. Add those together. That's your forecast final cost. If it's higher than the contract price, you want to know now.

If the forecast is going the wrong way, look for the reason. It's often unbilled changes, slow production or a cost nobody planned for, like bins, toilets or trailer rentals.

The right person on the paperwork

Records fall apart when they're everyone's job, which means nobody's. One person needs to own them.

That person should:

- Know how a job runs, not just how to type
- Read the contract and know its deadlines
- Chase the daily logs, change approvals and invoices every week
- Speak up early when a job's numbers look wrong

Small outfits often hand this to whoever has spare time. If that person doesn't know construction, things get missed. If you don't have the right person in-house, it's worth bringing in outside help for a few hours a week.

Checklist

- ☐ Daily log done every day, with photos
- ☐ Logs typed into a spreadsheet at least weekly
- ☐ Contract read, notice deadlines written down
- ☐ Every change written up the day it comes up
- ☐ Change costs tracked separately
- ☐ Changes billed on the next invoice
- ☐ Costs compared to budget once a month
- ☐ Forecast final cost updated once a month
- ☐ One person owns the paperwork