

Internal Operations Sample

SAMPLE
PREVIEW

A clean preview of the workbook-style tools included in the full Contractor Admin Kit.

This sample shows the **type of internal tracking system** included in the kit. The full version includes editable workbook tabs for intake, work orders, job closeout, client tracking, and basic business setup.

Sample job intake tracker

A simplified preview of how a contractor can capture leads, status, next steps, and key notes in one place.

Client	Job type	Priority	Status	Next step	Due
Sample Client A	Fence repair	Medium	Estimate needed	Send quote	Fri
Sample Client B	Backyard cleanup	High	Booked	Confirm crew	Mon
Sample Client C	Interlock repair	Low	Follow-up	Check decision	Wed
Sample Client D	Deck staining	Medium	In progress	Order material	Thu

What this helps with

- Capture new leads consistently
- Track jobs from inquiry to closeout
- Reduce forgotten follow-ups
- Keep customer notes in one place

In the full version you receive

Editable spreadsheet tabs for Job Intake, Work Order, Job Closeout, Client Tracker, and Business Setup. The table above is a limited preview only.

Internal Operations Sample

A simple overview of what the full internal workbook helps organize.

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Full-version workbook tabs

The full kit gives you simple internal tools that work together without software subscriptions or complicated setup.

Tool	Purpose
Job Intake	Capture new inquiries, job type, customer details, site notes, and quote status.
Work Order	Turn approved jobs into clear internal instructions before work begins.
Job Closeout	Check completion details, photos, payment status, and follow-up needs.
Client Tracker	Keep a simple record of customers, repeat work, notes, and future opportunities.
Business Setup	Store basic business details used across your templates and documents.

Preview note: This sample is intentionally limited. In the full version, customers receive the editable workbook so they can add their own jobs, clients, notes, and workflow details.