FREE RESOURCE FOR FLORIDA CONTRACTORS

PROJECT DOCUMENTATION CHECKLIST

The records that keep a project's numbers defensible from bid to closeout. The same file discipline we use on every takeoff: the received copy stays untouched, work happens on a copy, and delivered files are never overwritten.

1 · BID STAGE

- [ ] Plan set as received, kept unedited in its own folder
- [ ] Revision and addenda log
- [ ] Takeoff with sheet reference on every line
- [ ] Questions sent to the designer, with dates and answers
- [ ] Your bid and its exclusions

2 · CONTRACT

- [ ] Signed contract and scope of work
- [ ] Accepted quote/bid version referenced in the contract
- [ ] Insurance certificates, licenses, permits
- [ ] Schedule of values

3 · DURING CONSTRUCTION

- [ ] Every new revision logged before it's used
- [ ] Change orders: scope, quote, written approval, then work
- [ ] RFIs and responses
- [ ] Daily logs and dated photos
- [ ] Delivery tickets vs. takeoff quantities
  Catch shortages early.

4 · CLOSEOUT

- [ ] As-built or record set
- [ ] Final quantities vs. bid quantities
  Your best data for the next bid.
- [ ] Warranties and product approvals
- [ ] Final payment records

5 · FILE RULES

- [ ] One folder per project, numbered
- [ ] Received / Working / Delivered folders kept separate
- [ ] Never work from a shared 'edit' link
- [ ] File names start with the sheet or document number

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