01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

Open the Willow House demonstration →

WILLOW HOUSE / A PRACTICAL JOBTREAD TRAINING MANUAL

Build the job. Guide the customer. Run the work.

Learn how to build and run a job in JobTread, using Willow House as your working example.



Willow House kitchen concept. Illustrative design for a fictional teaching project.

$180,000	$126,000	30%
Base contract	Estimated cost	Planned gross margin

Independent training by Melissa Moore Advisory. Open the demonstration with the orange button and follow along with this manual. For a guided presentation, use the route on page 26.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

HOW TO USE THIS MANUAL

One job. Three phases. A clear next step.

Open Willow House beside this manual and follow the orange phase labels. On each page, find the JobTread screen, review the example, then follow the numbered steps. The final checkpoint explains what should be in place before you continue.

01 / BUILD THE JOB
Create the records, organize the scope, price it correctly, and prepare the proposal. **Pages 5-9.**

02 / GUIDE THE CUSTOMER
Welcome the homeowner, organize information, guide choices, and verify access. **Pages 10-16.**

03 / RUN THE WORK
Coordinate trades, record progress, manage changes and bills, and prepare handover. **Pages 17-24.**

Walk the job	Page
Meet the family and the teaching scenario	3
Understand the staged records	4
Customer, location, and job / Dashboard	5
Budget / pricing and allowances / Proposal	7
Welcome / Files and Plans / Selections	10
Countertop example / homeowner preview / Forms	13
Trust-building customer messages	16
Schedule / Daily Logs	17
Change Orders / Purchase Orders / Bills	19
Costs, billing, Reports, and closeout	22
Daily and weekly operating rhythm	24
Build your own job checklist	25
One-page presenter route	26

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MEET WILLOW HOUSE

The family said yes. What happens next?

The Willow family wants a brighter kitchen, a refreshed main floor, and an updated laundry room. They live in the house during construction. They are excited about the result and unsure what the coming weeks will feel like.

The contractor's job is to make the work understandable: what is included, who needs to decide, what happens next, and how changes will be handled. Willow House shows how those answers connect inside JobTread.

Story moment	What the contractor needs to do	Where it lives
The family approves the proposal	Confirm the agreement, then explain the next step.	Proposal + Messages
They need to choose finishes	Show included options, upgrades, and decision dates.	Selections + Files
Trades prepare for installation	Confirm products, site readiness, and handoffs.	Schedule + purchasing
Concealed subfloor damage appears	Explain scope, price, time, and the approval needed.	Daily Logs + Change Order
An electrical bill exceeds the order	Investigate the $1,200 difference before approval.	Purchase Order + Bill
The project approaches handover	Finish punch work, reconcile balances, and explain service.	Reports + Care & Warranty

The snapshot you are reviewing

Job: DEMO | Willow House Remodel, GSC-041

$180,000	$126,000	$15,400	$54,000 / 30%
Base price	Projected cost	Sample actual cost	Projected gross profit

Three schedule activities are complete; rough-in is underway. Countertops are due October 22; hardware and lighting October 23. Cabinet installation is targeted for November 2-6, with base completion December 4, 2026.

KEEP THESE TWO QUESTIONS OPEN

Will the family approve the $6,000 subfloor repair? Why did the electrical bill arrive at $8,200 against a $7,000 order? These questions make the workflow visible.

FROM MELISSA

As you go, ask yourself: could I explain what happens next to my customer or the person helping me run this job? That is what I want this example to help you do.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

READ ONCE BEFORE YOU EXPLORE

What is built, and what is simulated

Willow House is a fictional demonstration. The manual describes the teaching snapshot as of October 19, 2026. Dates illustrate the process and are not a reconstruction of a real project.

Record or feature	How to interpret it
Base proposal	Manually staged as approved without a customer signature. On a live job, obtain the agreement and approval evidence your process requires.
Two paid cost records	Simulated vendor bills totaling $7,000 and $8,400. Their paid labels do not represent actual transfers.
Customer billing and receipts	No deposit invoice, progress invoice, or customer payment is staged. Collected remains $0.
Pending decisions	Three selections and the $6,000 repair remain pending. The repair and its two working days are excluded from the base forecast and schedule.
Accounting synchronization	Base contract, purchase order, repair change, and vendor bills are excluded from QuickBooks sync. This guide does not demonstrate accounting synchronization.
Plans and photos	Design boards are illustrative. There are no measured construction drawings or progress-photo evidence in the sample.
Customer experience	Administrator Preview as User was visually reviewed for the homeowner Dashboard, Forms, and countertop guidance. This preview does not test the separate link used to share the demonstration.
Additional workflows	Full bid comparison, vendor compliance, trade portal onboarding, customer invoicing, and a custom report pack are not staged.

EXPLORE WITHOUT CHANGING THE EXAMPLE

Browse the live records. Use a separate practice copy for status changes, approvals, invoices, and payments, and check its accounting connections first.

Screenshots are labeled by audience. Orange numbers are manual annotations. Instructions describe the workflow; labels and navigation can vary with account configuration and permissions. This is an independent MMA training resource.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

01 / BUILD THE JOB

Create a clear home for the job

WHERE TO CLICK Customers > customer account > location > job

WHAT YOU SEE IN WILLOW HOUSE
A fictional customer, a homeowner contact, a property, and one fixed-price remodel.

WHY THIS MATTERS
These records connect communications, documents, access, and future work without duplicating the customer.

Record	Willow House example	Purpose
Customer account	DEMO | Willow House Family	The customer relationship.
Contact	Willow Homeowner (Fictional Demo)	The individual receiving access and decisions.
Location	Willow House | Fictional Demo	The property where work takes place.
Job	DEMO | Willow House Remodel	The budget, schedule, and records for this renovation.

What you do next

1. Search for an existing customer before creating another record. Add the actual decision maker and verify contact details.
2. Add or confirm the location. Create the job with a clear name and the correct price structure. Willow House uses fixed price.
3. Write a useful overview: scope, customer priorities, occupied-home needs, next decisions, and milestones.
4. Use job areas that help organize the work. This job uses General, Kitchen, Main Floor, and Laundry.

FROM MELISSA
Even if you are the whole team right now, write the overview for the next person who might help you. They should be able to understand the job without starting from scratch.

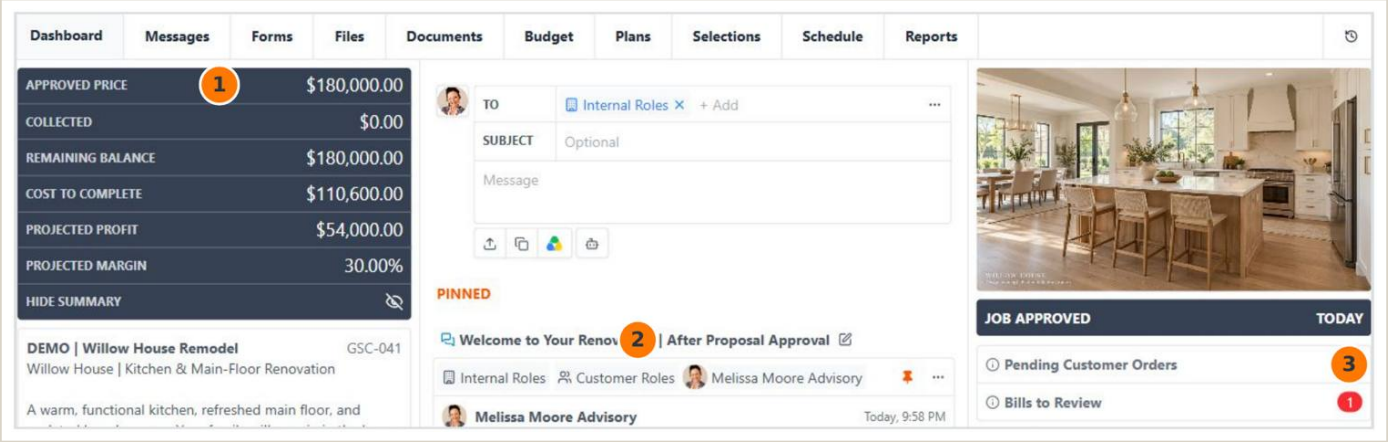
READY TO MOVE ON WHEN
The customer, person, property, and project are clear. The overview explains the work and the correct people can be assigned.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

01 / BUILD THE JOB

Find the decisions that need attention

WHERE TO CLICK Job > Dashboard



CONTRACTOR VIEW. 1 Financial summary: read the baseline. 2 Pinned welcome: guide the customer. 3 Review queues: find open decisions.

WHAT YOU SEE IN WILLOW HOUSE
A financial summary, a pinned welcome, and queues for pending orders and bill review.

WHY THIS MATTERS
You can see the approved baseline and the exceptions that may change the outcome in one place.

Read this	Interpret it
Approved price $180,000	The $6,000 pending repair is excluded.
Collected $0	No customer receipts are staged.
Projected profit $54,000 / 30%	A forecast to review when new costs become known.
Cost to complete $110,600	Projected cost less sample actual cost.

What you do next

1. Open pending customer orders and the bill review queue. Identify who must decide and when.
2. Check selection dates and the next schedule milestone. Keep a short exception list with an owner and due date.

FROM MELISSA
When I open a job, I want to know what needs attention first. Start with the open decisions, then give each one an owner and a next step.

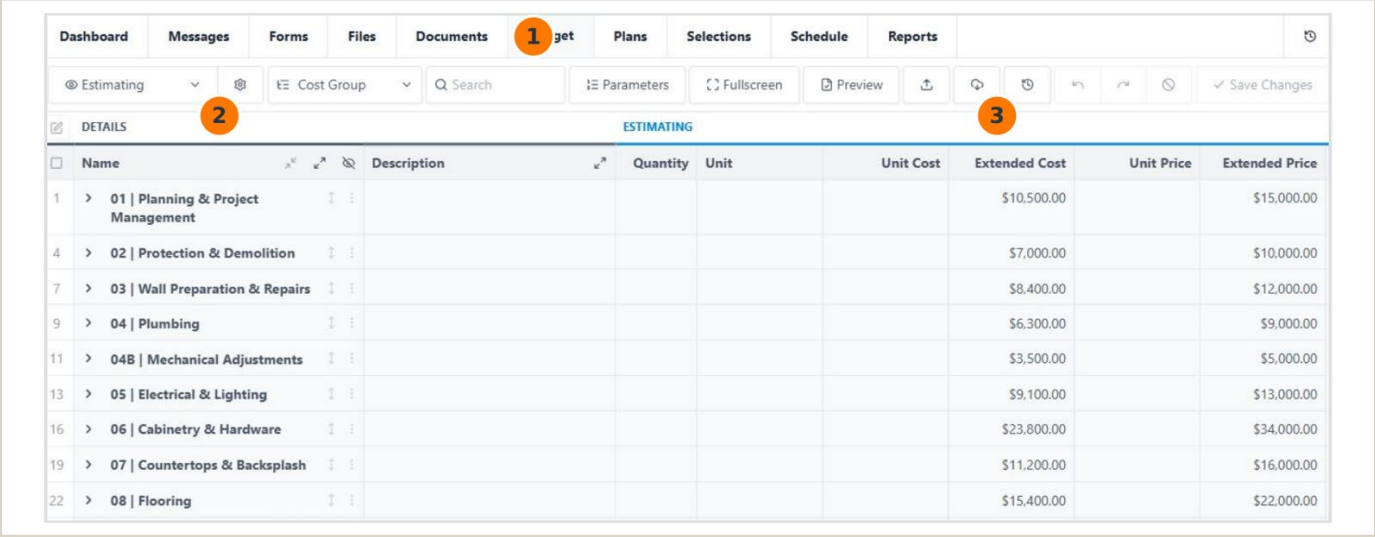
READY TO MOVE ON WHEN
You can name the next customer decision, the financial issue under review, and the person responsible for each.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

01 / BUILD THE JOB

Build the Budget around the work

WHERE TO CLICK Job > Budget > Estimating view



	Name	Description	Quantity	Unit	Unit Cost	Extended Cost	Unit Price	Extended Price
1	01 | Planning & Project Management					$10,500.00		$15,000.00
4	02 | Protection & Demolition					$7,000.00		$10,000.00
7	03 | Wall Preparation & Repairs					$8,400.00		$12,000.00
9	04 | Plumbing					$6,300.00		$9,000.00
11	04B | Mechanical Adjustments					$3,500.00		$5,000.00
13	05 | Electrical & Lighting					$9,100.00		$13,000.00
16	06 | Cabinetry & Hardware					$23,800.00		$34,000.00
19	07 | Countertops & Backsplash					$11,200.00		$16,000.00
22	08 | Flooring					$15,400.00		$22,000.00

CONTRACTOR VIEW. **1** Budget tab: the scope and pricing home. **2** Cost groups organize the work. **3** Cost and price columns answer different questions.

WHAT YOU SEE IN WILLOW HOUSE
22 budget items in 13 groups, from planning and protection through trades, finishes, and closeout.

WHY THIS MATTERS
The budget becomes the source for scope, proposal pricing, purchasing, and financial review.

What you do next

1. Create scope groups that match how you estimate, buy, and review work. Describe inclusions and exclusions clearly.
2. Enter meaningful quantities, units, cost, selling price, cost code, and cost type. Separate supply and installation when it prevents overlap.
3. Check that scope, allowances, taxes, responsibilities, and totals agree before generating the proposal.

FROM MELISSA
I want your cost codes to make estimating and reviewing jobs easier. Reuse a consistent code for the work instead of creating a new one for every finish.

ADAPT BEFORE REUSE
Many sample items use quantity 1 and broadly use Subcontractor as the cost type. Use real quantities and suitable labor, material, subcontractor, and other classifications on your own job.

READY TO MOVE ON WHEN
The scope is complete, the classifications support your reports, and the $126,000 cost and $180,000 price reconcile to the intended baseline.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

01 / BUILD THE JOB

Make the price and allowances explainable

WHERE TO CLICK Budget > cost item details

WHAT YOU SEE IN WILLOW HOUSE
A $180,000 selling price at 30% gross margin, including five price allowances totaling $32,000.

WHY THIS MATTERS
Clear definitions prevent margin mistakes and help homeowners understand what their choices will add.

Term	Use it correctly
Cost group	Organizes a scope section, such as Electrical & Lighting.
Cost code	Classifies work across jobs: 0705 Electrical; 1020 Countertops.
Cost type	Identifies the nature of spend, such as labor or materials.
Price allowance	An amount already in the agreement for a later choice.

30% MARGIN DIFFERS FROM 30% MARKUP
$126,000 ÷ 0.70 = $180,000. Gross profit is $54,000; equivalent markup on cost is about 42.86%. Gross profit must still cover business overhead and other obligations.

Included price allowance	Amount	Selection staged?
Countertops	$10,000	Yes
Cabinet hardware	$2,000	Yes
Decorative lighting	$3,000	Yes
Appliances	$14,000	Not yet
Sink and faucet	$3,000	Not yet
Total	**$32,000**	**Three decisions staged**

What you do next

1. Define what each allowance includes: product, installation, tax, freight, and fee treatment. These sample price allowances include profit.
2. Confirm the included amount and explain the added amount separately before requesting a choice.

FROM MELISSA
Before asking for a choice, explain what is already included and what costs extra. If that is hard to explain, simplify the selection before sending it.

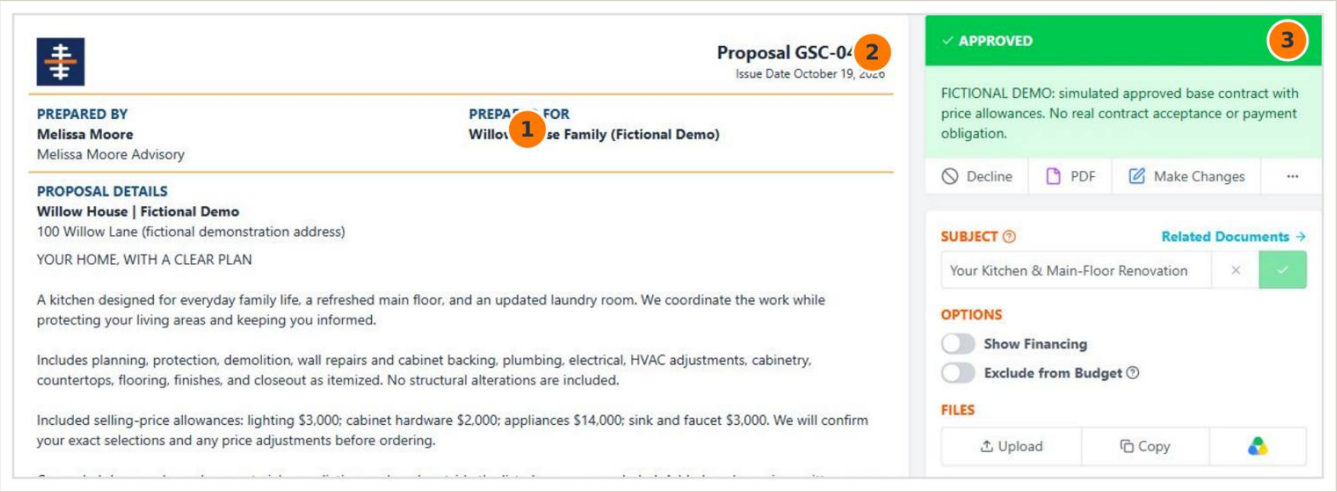
READY TO MOVE ON WHEN
Your team and the homeowner understand the included amount, upgrade treatment, and approval process.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

01 / BUILD THE JOB

Turn scope into an understandable Proposal

WHERE TO CLICK Documents > Proposal GSC-041-1



CONTRACTOR VIEW. 1 Confirm the named customer. **2** Identify the correct proposal. **3** Read the status with its approval evidence.

WHAT YOU SEE IN WILLOW HOUSE
The $180,000 base proposal and a separate Welcome & What Happens Next guide.

WHY THIS MATTERS
The proposal establishes the scope and price; the welcome guide explains how the family moves into the project.

What you do next

1. Review the customer, location, scope, allowance amounts, exclusions, and total. Preview the customer-facing presentation.
2. Confirm recipients, visible pricing, required signatures or approvals, expiration, and the accompanying message.
3. Send through your approved workflow. Verify the customer can open it and check the required approval evidence before releasing the next phase.

FROM MELISSA
I would not stop at “Sent.” Make sure the customer can open the proposal, understands what they are reviewing, and knows how to respond.

READ THE DEMO CORRECTLY
The base approval is simulated. The welcome document carries no price, uses a Proposal template, and is excluded from the budget. Introduce it as an onboarding guide so its template label does not confuse the customer.

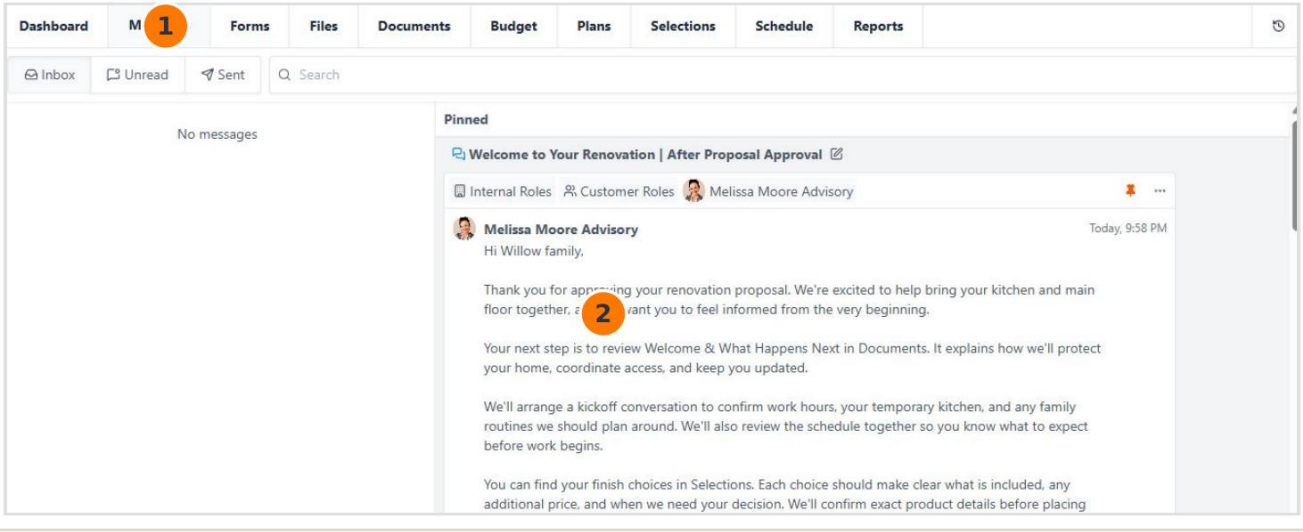
READY TO MOVE ON WHEN
The intended customer can read the scope and price, the required agreement is in place, and the welcome step has an owner.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

02 / GUIDE THE CUSTOMER

Make approval feel like a beginning

WHERE TO CLICK Messages > pinned Welcome to Your Renovation message



CONTRACTOR VIEW. 1 Use the project Messages tab. **2** Pin the welcome and orient the family.

WHAT YOU SEE IN WILLOW HOUSE
A pinned welcome, a next-decision reminder, and a separate welcome guide in Documents.

WHY THIS MATTERS
The homeowner knows where to look, what to do, and when they will hear from you again.

CUSTOMER-READY WELCOME
Thank you for approving your renovation proposal. Please start with Welcome & What Happens Next in Documents. At kickoff, we will confirm access, work hours, your temporary kitchen, and family routines. Use this project thread for questions. Expect a Friday update with progress, next week's plan, and decisions we need from you.

What you do next

1. Review the guide together. Confirm dust protection, pets, access, temporary facilities, and the urgent contact process.
2. Name the decision maker. Explain Selections and the first deadlines. Check the audience before posting.

FROM MELISSA
Your customer may be doing this for the first time. Walk them through the next step instead of assuming they know how your process works.

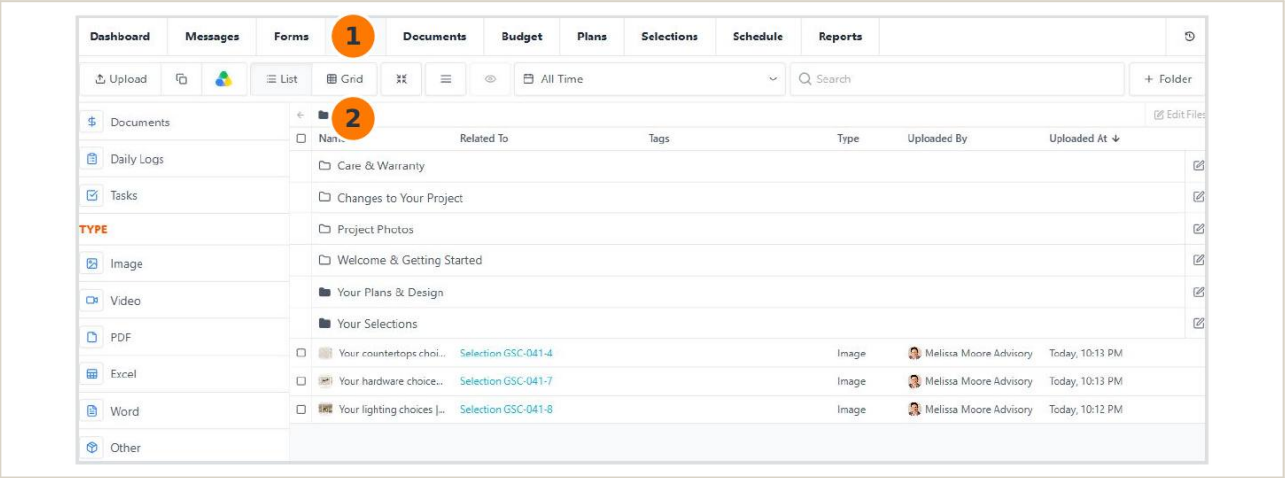
READY TO MOVE ON WHEN
The homeowner knows the next action, the communication rhythm, and where to ask for help.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

02 / GUIDE THE CUSTOMER

Give every file an obvious home

WHERE TO CLICK Job > Files; use Plans for current drawings



CONTRACTOR VIEW. 1 Open Files for supporting information. **2** Use meaningful folder names.

WHAT YOU SEE IN WILLOW HOUSE
Six customer-friendly folders for orientation, design, choices, photos, changes, and care.

WHY THIS MATTERS
A homeowner can find useful information without learning your internal filing language.

Folder	Put this here
Welcome & Getting Started	Orientation and site preparation.
Your Plans & Design	Current design information and labeled concepts.
Your Selections	Guides and approved product information.
Project Photos	Dated progress photos with context.
Changes to Your Project	Supporting information for proposed or approved changes.
Care & Warranty	Manuals, care instructions, and service information.

What you do next

1. Use descriptive filenames and clear revision dates. Verify the audience and current version before release.
2. For live construction, add measured drawings and specifications and use Plans tools where appropriate. This sample contains concepts rather than a construction plan set.

FROM MELISSA
Use folder names your customer would recognize. Then preview their access so you know the information is actually available to them.

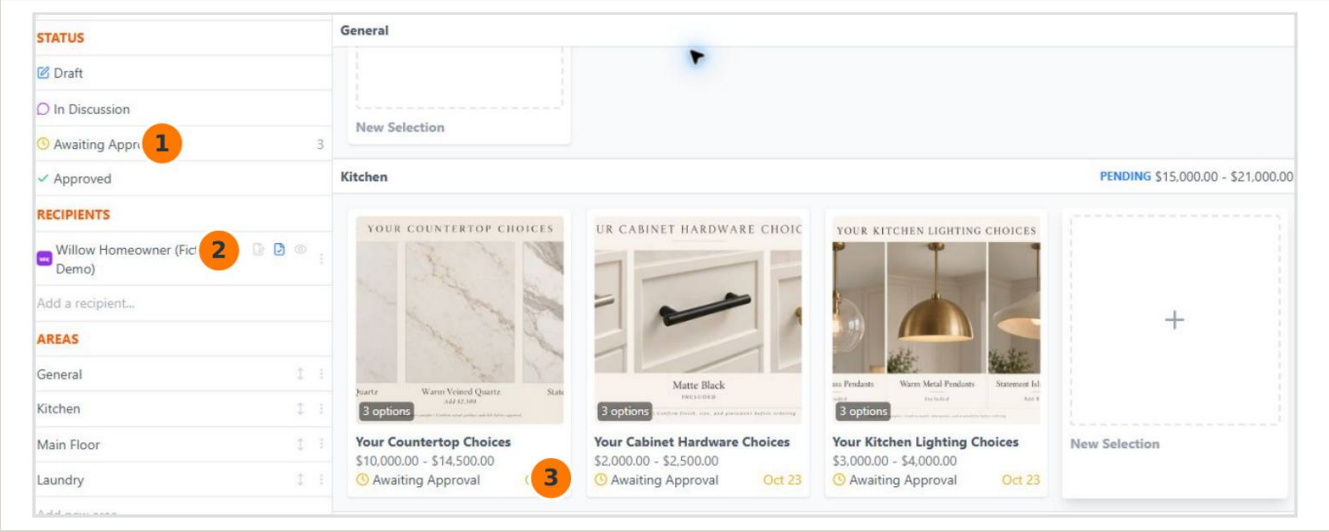
READY TO MOVE ON WHEN
The customer can find the current information, and your team can distinguish a concept from an approved construction document.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

02 / GUIDE THE CUSTOMER

Build Selections as guided decisions

WHERE TO CLICK Job > Selections > open a selection card



CONTRACTOR VIEW. 1 Three decisions await approval. **2** Check the intended recipient. **3** Each card pairs a choice with its due date.

WHAT YOU SEE IN WILLOW HOUSE
Countertop, hardware, and lighting decisions, each linked to an included allowance and three options.

WHY THIS MATTERS
Curated choices, a reasoned recommendation, and a deadline help the homeowner decide before purchasing is affected.

Decision	Included amount	Due
Countertops	$10,000	Oct 22
Cabinet hardware	$2,000	Oct 23
Decorative lighting	$3,000	Oct 23

What you do next

1. Create the selection in the right job area and link the matching allowance. Add options, descriptions, prices, product details, and a due date. Check the recipient before using Release Selections.
2. Confirm recipients and due dates before release. After approval, verify the selected item, allowance balance, overage, and ordering requirements.

FROM MELISSA
A few well-explained choices are often more helpful than a long product list. Give your recommendation, explain why, and leave room for questions.

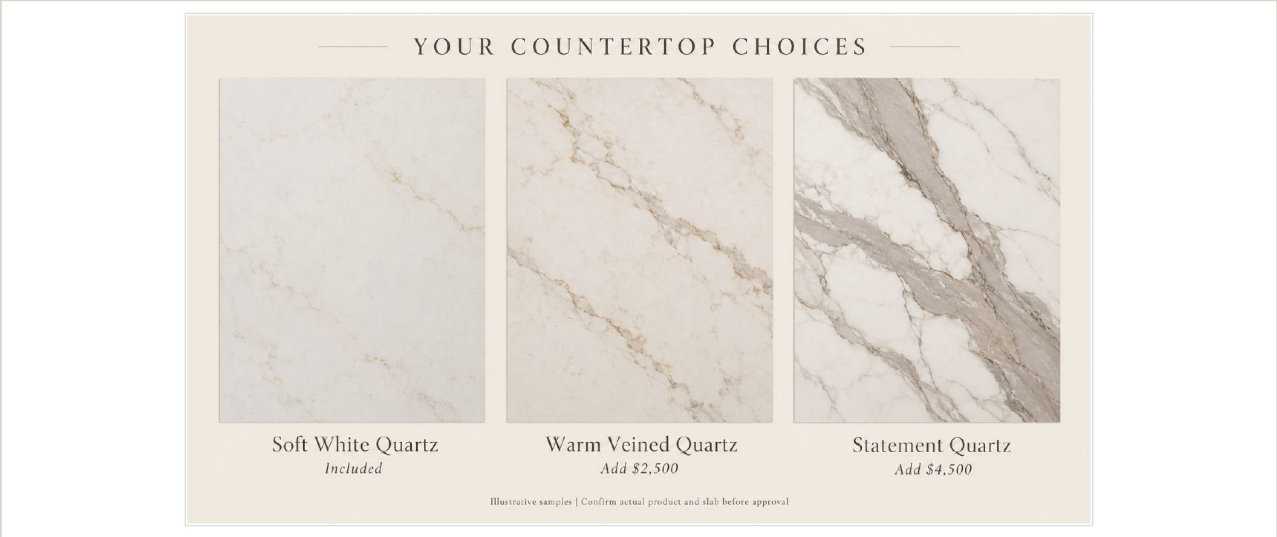
READY TO MOVE ON WHEN
The approval identifies the exact choice and added price, and the related budget treatment is reconciled without duplicating an overage.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

02 / GUIDE THE CUSTOMER

Explain the choice and the dollars

WHERE TO CLICK Selections > Your Countertop Choices



Illustrative guide. Upgrade labels show the amount added above the included allowance.

WHAT YOU SEE IN WILLOW HOUSE
A $10,000 included countertop package with two upgrade choices.

WHY THIS MATTERS
The homeowner can compare a design preference with its actual effect on the agreement.

Option	Package total	Added above allowance
Soft White Quartz	$10,000	Included
Warm Veined Quartz	$12,500	$2,500
Statement Quartz	$14,500	$4,500

What you do next

1. Explain the recommendation: Soft White Quartz keeps the kitchen light and coordinates with the oak island. Invite a sample review if the family is unsure.
2. Before ordering, confirm manufacturer, model, finish, edge, seam layout, sink details, availability, installation, and final price.
3. Reconcile the allowance and approved overage. If selection approval already captures the overage, do not duplicate it on another change order.

FROM MELISSA
Say “Your allowance already includes $10,000; this option adds $2,500.” That is easier to understand than showing $12,500 without context.

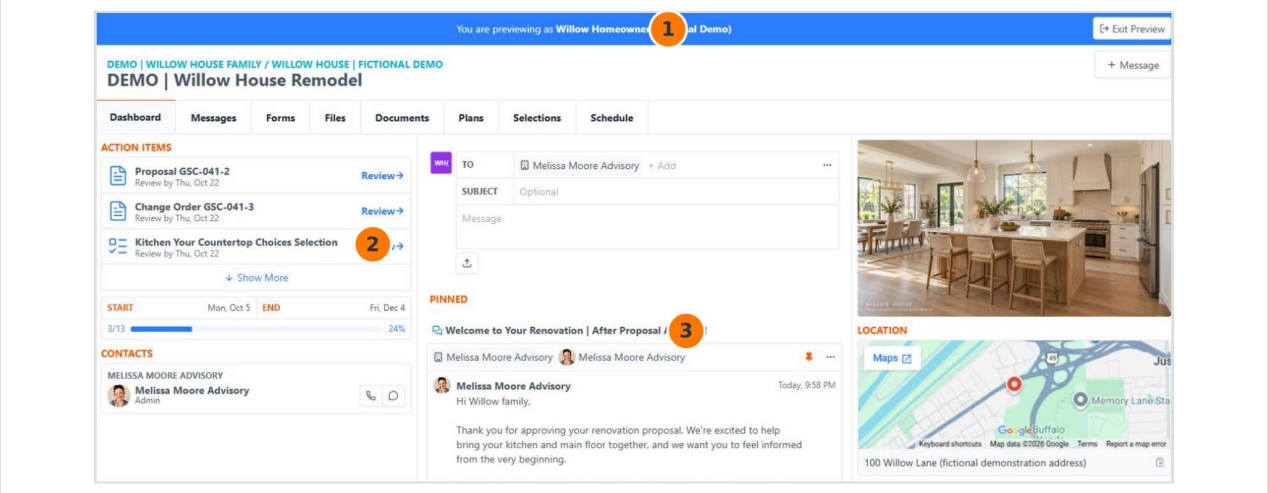
READY TO MOVE ON WHEN
The chosen finish and added amount are approved, product details are confirmed, and the purchase can be released.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

02 / GUIDE THE CUSTOMER

See the project through the homeowner's eyes

WHERE TO CLICK Dashboard > Job Access > homeowner menu > Preview as User



HOMEOWNER PREVIEW. 1 Preview banner confirms the audience. **2** Action items show decisions and review dates. **3** Pinned welcome gives direction.

WHAT YOU SEE IN WILLOW HOUSE
A dedicated external homeowner role with a focused Dashboard, shared messages, and relevant project information.

WHY THIS MATTERS
Your contractor screen and the customer experience serve different purposes. Preview both before inviting a real customer.

Contractor review on page 6	Homeowner preview above
Cost, profit, and bill-review queues	Action items and customer review dates.
Internal coordination and controls	Welcome, shared updates, schedule, and contact route.
Budget and purchasing tools	Customer documents, choices, files, and relevant forms.

What you do next

1. Use Preview as User for the intended homeowner. Open the welcome, choices, schedule, files, and forms. Confirm the customer can find the next action.
2. Check that internal content is excluded. Exit Preview when finished. On a live rollout, also test the actual portal link your customer will use.

FROM MELISSA
This is a step I would build into every setup. Preview the job before inviting the customer, so you can see whether the next action is clear.

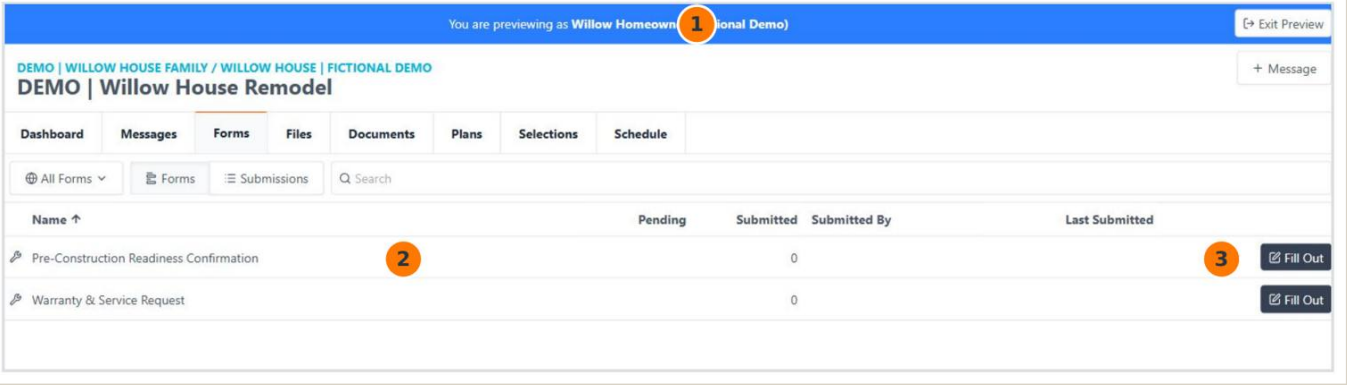
READY TO MOVE ON WHEN
The visual preview matches the intended customer experience, and the actual customer portal link is checked before live rollout.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

02 / GUIDE THE CUSTOMER

Show the right Forms at the right moment

WHERE TO CLICK Homeowner Preview > Forms; administrator > Job Access



HOMEOWNER PREVIEW. 1 Confirm the intended homeowner preview. **2** Only two relevant forms are listed. **3** Fill Out starts the relevant process.

WHAT YOU SEE IN WILLOW HOUSE
Pre-Construction Readiness Confirmation and Warranty & Service Request, scoped to the dedicated homeowner role.

WHY THIS MATTERS
The homeowner sees the forms that support this remodel without unrelated forms from other demonstrations.

What you do next

1. Before work starts, ask the homeowner to open Pre-Construction Readiness Confirmation and select Fill Out. Review access, pets, protection needs, questions, and readiness. Limit access to sensitive security instructions.
2. After handover, explain the warranty request route. Name the reviewer and define acknowledgment, scheduling, and resolution.
3. Check roles, job access, document recipients, folder visibility, and Daily Log access together. Administrator All Forms remains an account-wide catalog.

Allowed for this homeowner	Excluded from the role
Only Willow House and its customer records	Other jobs; vendor orders and bills.
Shared messages, logs, files, schedule, and choices	Internal to-dos; internal Budget access.
The two relevant Forms	Unrelated forms from other projects.

FROM MELISSA
Be careful here: filtering your own list does not change customer access. Check the customer role and preview what that person can actually see.

READY TO MOVE ON WHEN
The intended customer sees the two relevant forms and can use the right one, while internal records remain restricted.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

02 / GUIDE THE CUSTOMER

Use language that builds trust

WHERE TO CLICK Messages > correct audience > clear subject

These are reusable teaching examples for this scenario. Adapt them to verified facts before sending. A message explains the situation; the applicable selection or change record captures the required approval.

SELECTION REMINDER / MAKE THE DECISION EASY

Please review Your Countertop Choices by October 22 and hardware and lighting by October 23. Your countertop allowance already includes $10,000. Soft White Quartz is included; Warm Veined Quartz adds $2,500; Statement Quartz adds $4,500. If you are unsure, reply here and we will review a sample together. We will confirm product details and availability before ordering.

UNEXPECTED REPAIR / EXPLAIN BEFORE ASKING

We found deteriorated subfloor near the former dishwasher. We have isolated the affected area and are holding that additional work. The proposed repair is $6,000 and allows two working days after approval. Please review the Change Order for scope and price. We will review the effect on the schedule before confirming revised dates. Reply here with questions before approving.

FRIDAY UPDATE / CONNECT PROGRESS TO THE PLAN

This week, trades reviewed the layout and began rough-ins in accessible areas. Next, we are coordinating inspection readiness against the October 26 target. We still need your countertop choice by October 22 and hardware and lighting by October 23. The subfloor repair remains on hold pending approval. Cabinet installation is targeted for November 2-6; we will confirm changes after the repair and sequencing review.

Use this pattern every time

What happened > **What it means** > **What happens next** > **What we need from you** > **When you will hear from us**

Keep internal pricing disputes in the internal review workflow.

FROM MELISSA

You do not need formal language to sound professional. Explain what is happening, offer help, and be specific about what you need next.

READY TO MOVE ON WHEN

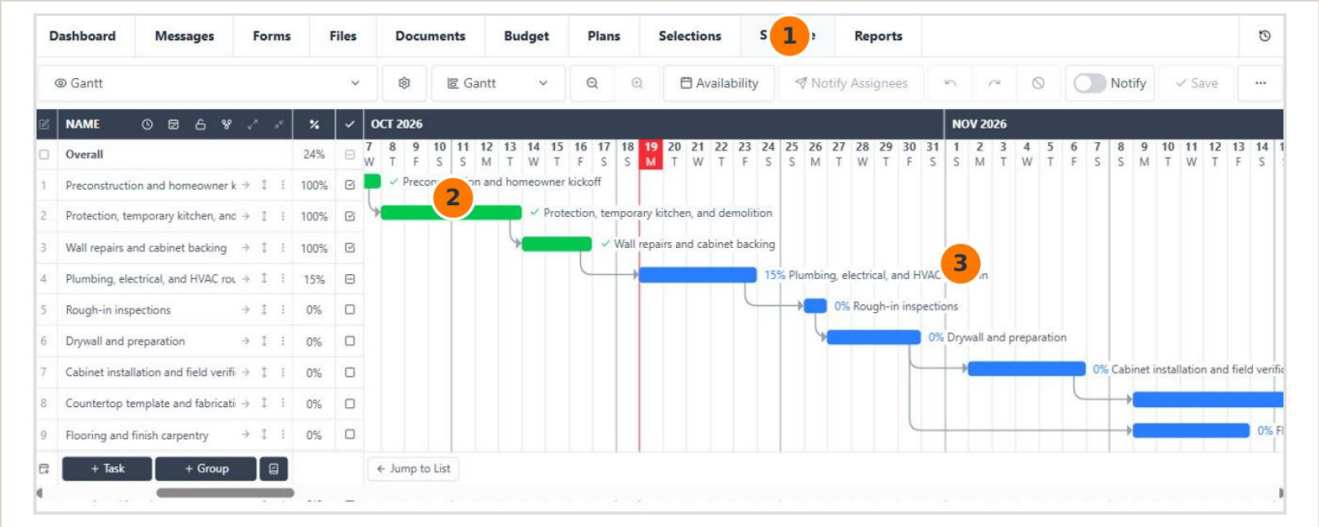
The reader can identify the action, deadline, help available, and next update without sending a follow-up question.

01 Build the job pp. 5-9 | 02 Guide the customer pp. 10-16 | 03 Run the work pp. 17-24

03 / RUN THE WORK

Turn the scope into a workable Schedule

WHERE TO CLICK Job > Schedule > Gantt view



CONTRACTOR VIEW. 1 Open the job Schedule. **2** Review the sequence of activities. **3** Check dependencies before moving dates.

WHAT YOU SEE IN WILLOW HOUSE
13 activities from October 5 to December 4, with three complete and rough-in underway.

WHY THIS MATTERS
The schedule connects customer decisions, purchasing, trade readiness, and inspections.

Milestone	Base date	Check before proceeding
Rough-in inspections	Oct 26	Trade readiness and inspection requirements.
Cabinet installation	Nov 2-6	Drawings, dimensions, clearances, and site ready.
Countertop template	Nov 9	Cabinets secured; sink and product confirmed.
Final walkthrough	Dec 3-4	Testing, inspections, punch, and handover.

What you do next

1. Give each activity an owner, a realistic duration, and a clear finish point. Add its prerequisites: the work or decisions that must be complete first. Assign actual people and trade contacts on your own job.
2. Before moving a milestone, check dependent work and material lead times. The proposed repair's two working days are not yet inserted into this base schedule.

FROM MELISSA
Before I tell a customer a date, I want to know what must happen first. Check the material, decision, inspection, or trade that the next activity depends on.

READY TO MOVE ON WHEN
The next trade can explain what must be ready, who owns it, and what happens if the prerequisite slips. Schedule progress is not financial completion.

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03 / RUN THE WORK

Record progress so the next person can act

WHERE TO CLICK Daily Logs > Willow House > choose the date; navigation may be under More

WHAT YOU SEE IN WILLOW HOUSE
Three sample logs: wall preparation, a weekly update, and rough-in start.

WHY THIS MATTERS
A good log preserves the facts, explains a hold, and tells the next person what needs attention.

Log	What to notice
October 15 / wall preparation	Protection, completed work, and the concealed condition.
October 16 / weekly update	Progress connected to next week and customer decisions.
October 19 / rough-in start	Current activity, repair hold, and upcoming deadlines.

CUSTOMER-READY EXCERPT
Today we completed wall repairs and backing for the new cabinetry. Your living areas remained protected. We found deteriorated subfloor near the former dishwasher and have isolated it. The proposed additional repair remains on hold until the required approval is recorded.

What you do next

1. Open the log for the correct job and date. Review notes, attachments, and custom fields separately. Add dated photos of actual work on a live job.
2. Write completed work, site conditions, issues, decisions needed, and the next step while details are fresh.
3. Use Daily Log Access to check the audience. Add the customer to the job and deliberately share the relevant log.

FROM MELISSA
Write the log for someone who was not there. Explain what was completed, what is waiting, and what needs to happen next, while the details are still fresh.

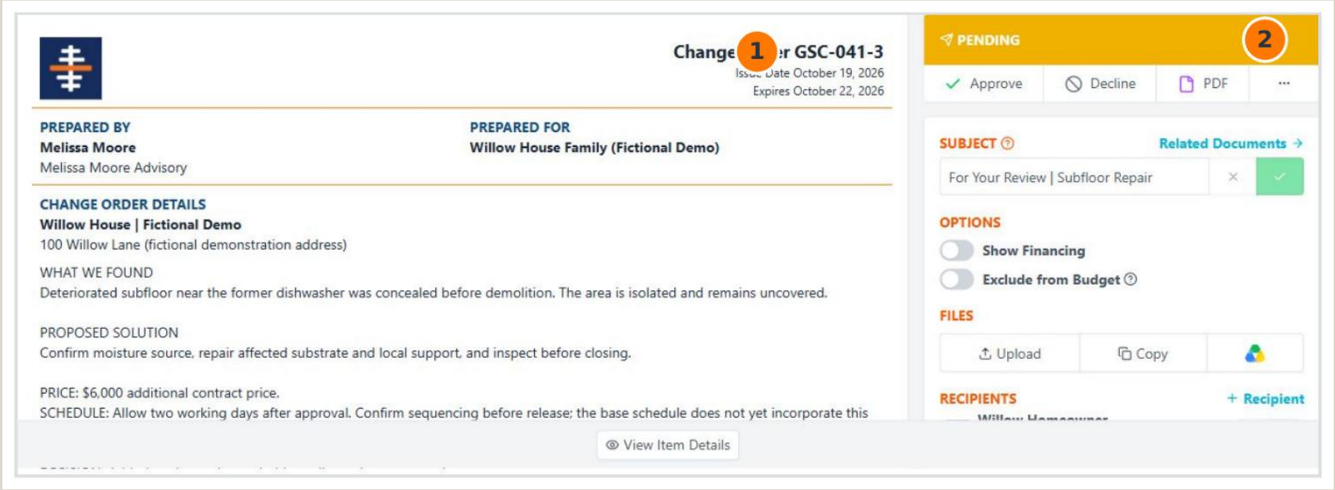
READY TO MOVE ON WHEN
The log is factual, the intended audience is correct, and an open issue has an owner and next action. The sample logs do not contain progress-photo evidence.

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03 / RUN THE WORK

Approve the repair before releasing the work

WHERE TO CLICK Documents > Change Order GSC-041-3



CONTRACTOR VIEW. 1 Identify the correct change document. **2** Pending means the decision remains open.

WHAT YOU SEE IN WILLOW HOUSE
A pending $6,000 subfloor repair with $4,200 estimated cost and two working days after approval.

WHY THIS MATTERS
Scope, price, time, and authorization need to stay connected when conditions change.

What you do next

1. Document the condition and proposed repair. Explain inclusions, exclusions, added price, and the schedule impact.
2. Obtain the required written approval before releasing added work. A conversation expressing interest is not the approval record.
3. After the decision, update the forecast, purchasing instructions, schedule, and customer communication.

Illustrative outcome	Gross profit	Gross margin
Absorb repair; price stays $180,000	$49,800	27.67%
Approve change; price becomes $186,000	$55,800	30.00%

FROM MELISSA
I would explain the condition before asking for approval. The customer should understand the repair, added price, and possible schedule change before the work starts.

READY TO MOVE ON WHEN
The actual approval evidence is recorded and the affected scope, forecast, and schedule are updated. In this snapshot, the repair remains on hold.

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03 / RUN THE WORK

Define the commitment before the bill

WHERE TO CLICK Documents > Purchase Order GSC-041-5

WHAT YOU SEE IN WILLOW HOUSE
An approved sample $7,000 purchase order for DEMO | Willow Electrical.

WHY THIS MATTERS
A clear commitment gives the trade a defined scope and gives the financial reviewer something to compare with the bill.

Purchase order detail	Willow House example
Scope	Kitchen/laundry rough-in and trim, listed circuits, switching, receptacles, and trim.
Change control	Added circuits or scope require written authorization.
Coordination	Trade access, inspections, and concealed-work photos before walls close.
Commitment	Approved $7,000 sample order.

What you do next

1. Confirm the vendor, quote, scope, and budget item. Resolve gaps and overlaps before authorizing work.
2. State inclusions, exclusions, specifications, dates, and approval requirements in plain language. Confirm the vendor receives the current scope.
3. Document changes to the commitment. Compare later bills with both the order and authorized changes.

FROM MELISSA
Use the purchase order to make the agreement with your trade clear. You will still need to verify completed work, review the bill, and complete your vendor checks.

READY TO MOVE ON WHEN
The trade and reviewer understand the same authorized scope, price, and change process.

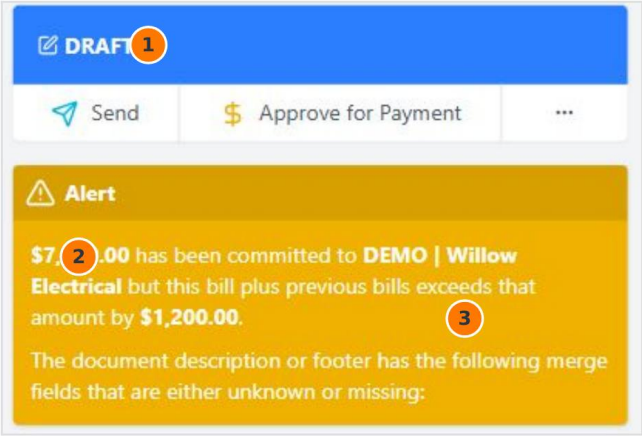
Open the electrical purchase order →

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03 / RUN THE WORK

Investigate the bill before approving it

WHERE TO CLICK Documents > Bill GSC-041-6 / DEMO-WH-ELEC-001



CONTRACTOR VIEW. 1 Draft: approval is still open. 2 The alert refers to the $7,000 commitment. 3 The unexplained difference is $1,200.

WHAT YOU SEE IN WILLOW HOUSE
An $8,200 electrical bill against a $7,000 order, with a financial-review follow-up task.

WHY THIS MATTERS
The alert gives the contractor a chance to investigate before approving an unsupported cost.

Compare	Amount
Approved order	$7,000
Bill received	$8,200
Unexplained variance	**$1,200**

What you do next

1. Check vendor, bill number, dates, amount, coding, and duplicate risk. Compare with completed work and authorized changes.
2. Request supporting detail for the additional circuits. Resolve missing document details and template warnings before release.
3. Keep the bill on hold until the responsible reviewer records a supported decision. A vendor overrun does not automatically become a homeowner charge.

FROM MELISSA
I would leave this bill on hold until the difference is explained. The goal is a supported decision, not simply clearing the alert from the screen.

READY TO MOVE ON WHEN
The variance is supported or corrected, coding is accurate, and the authorized reviewer has approved the bill. This sample remains Draft.

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03 / RUN THE WORK

Separate profit, cost, billing, and cash

WHERE TO CLICK Dashboard > Budget > Documents / Payments

WHAT YOU SEE IN WILLOW HOUSE
A base forecast, $15,400 in sample actual cost, and no staged customer invoices or receipts.

WHY THIS MATTERS
Each measure answers a different business question. A profitable forecast does not establish available cash or an amount due today.

Metric	Demo value	Interpretation
Approved price	$180,000	Base agreement; pending repair excluded.
Projected cost	$126,000	Expected total cost for base scope.
Actual cost	$15,400	Two simulated completed-work cost records.
Cost to complete	$110,600	Projected cost less sample actual cost.
Projected gross profit	$54,000 / 30%	Expected revenue less projected cost.
Collected	$0	No customer receipts staged.
Electrical commitment	$7,000	An order; do not add it to actual cost again.

What you do next

1. Review the forecast, meaning your current estimate of the job's final cost and profit, as new information becomes known. Include expected costs and committed orders without counting the same cost twice.
2. For customer billing, check the agreement, completed work, and billing conditions. Confirm the amount is due before creating the appropriate invoice.
3. Verify recipients and supporting detail. Record receipts only after payment is confirmed; reconcile the records in your accounting process.

FROM MELISSA
Check what your agreement allows you to bill and when. A report can flag a billing question, but you still need to confirm the amount is due.

READY TO MOVE ON WHEN
Your forecast is credible, billing has support, and receipts reflect confirmed payments. Customer invoices and receipts remain a next step in this demo.

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03 / RUN THE WORK

Use Reports to decide, then close out

WHERE TO CLICK Job > Reports; Budget; Documents; Files > Care & Warranty

WHAT YOU SEE IN WILLOW HOUSE
Source records for operational and financial review, plus a planned December walkthrough and care folder.

WHY THIS MATTERS
A report should answer a business question. Handover should finish both the work and the information the customer needs.

Ask this question	Reconcile these records
Is the expected profit achievable?	Approved scope, forecast, actual cost, commitments, and anticipated costs.
What is waiting for a decision?	Selections, changes, review tasks, and due dates.
What should we bill or collect?	Agreement, invoices, billing support, and receipts.
What must happen before the next trade?	Schedule prerequisites, specifications, inspections, and deliveries.

What you do next

1. Use the Reports and Budget views available to your role. Verify filters, dates, statuses, and source records. No custom report pack is staged here.
2. Complete the walkthrough. Give each punch item an owner and due date; verify completion. Confirm inspections, operation, manuals, and warranty contacts.
3. Reconcile the records: check that orders, bills, credits, returns, selections, allowances, changes, invoices, and receipts agree and that differences are resolved.
4. Provide handover information in Care & Warranty, explain the service form, and close the job when operational and financial obligations are ready.

FROM MELISSA
At handover, I want the customer to know how to care for the work and who to contact. Put that information somewhere they can find again.

READY TO MOVE ON WHEN
Punch and inspections are verified, financial records are reconciled, and care and service information are delivered. Willow House is still an active scenario.

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03 / RUN THE WORK

Run the job with a simple rhythm

Keep this page beside your workspace. On a small team, one person may wear several hats. Each decision still needs an owner, a next action, and evidence that it is complete.

When	Review and act	Leave a clear record
Every morning	Work, readiness, inspections, deliveries, blockers.	Owner, next action, due date.
After a site visit	Completed work, conditions, issues, quality, next steps.	Daily log and actual photos; correct audience.
Before ordering	Approved choice, specifications, availability, budget impact.	Approved selection and purchase authorization.
Before added work	Scope, price, time, and required approval.	Written change approval; updated forecast and schedule.
Before bill approval	Order match, work, changes, coding, duplicates.	Resolved variance and review evidence.
Every Friday	Next two weeks, decisions, changes, forecast, bills, concerns.	Customer update and internal exception list.
At closeout	Punch, inspections, care, credits, balances, service.	Complete handover and reconciled records.

Use the four open actions to practice the process

1. Request the subfloor repair decision; keep added work on hold.
2. Investigate the electrical bill's $1,200 variance before approval.
3. Confirm countertop, hardware, and lighting decisions before purchasing is affected.
4. Protect the cabinet milestone by checking product details, trade readiness, and the current schedule.

FROM MELISSA

Start with a routine you can keep up with during a busy week. A short, current review is more useful than a complicated process that falls behind.

THE HANDOFF

The project manager coordinates; the homeowner chooses; the trade confirms scope and readiness; the financial reviewer checks evidence. Make the decision, owner, and record clear even when one person fills several roles.

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TAKE THE PROCESS INTO YOUR BUSINESS

Build your own job, one layer at a time

Use the structure as a model, then adapt the details to your contract, project type, team, and accounting design. Remove irrelevant fields, forms, and folders rather than copying every account setting.

Build sequence	Ready-to-use checkpoint
1 / Customer, location, job	Correct records, decision maker, scope, and price structure.
2 / Budget and classifications	Complete scope, quantities, cost, price, codes, and allowance treatment.
3 / Proposal and agreement	Readable scope and pricing; correct recipients; required approval evidence.
4 / Customer welcome	Next action, communication rhythm, and site preparation explained.
5 / Files, Plans, Selections	Current documents, meaningful folders, clear choices, dates, approvals.
6 / Access and Forms	Customer preview reviewed; relevant forms; shared portal link tested.
7 / Schedule and field records	Owners, dependencies, realistic dates, and factual updates.
8 / Purchasing and financial review	Defined commitments, reviewed bills, current forecast, supported billing.
9 / Handover and service	Verified punch, reconciled balances, care information, service route.

Open the project examples

Dashboard | Budget | Documents | Selections | Schedule | Forms

Continue learning in JobTread Help

Selections with allowances | Daily Logs | Building a Form

MELISSA MOORE ADVISORY

Build a process that helps your customer understand the job and helps your team make the next decision. Assign responsibility, verify the experience, and keep the records current.

melissamoore.co | Construction operations and JobTread implementation guidance

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PRESENTER CHEAT SHEET / OPEN THE JOB BESIDE THIS PAGE

Your 30-minute demonstration route

Opening: “The Willow family approved a $180,000 remodel. Let's follow what the contractor needs to build, explain, and manage so the job stays understandable for everyone.”

Time / stop	Show and explain	Ask the contractor
0-3 min / Dashboard	Name the next decisions. Distinguish approved price, collected cash, and projected profit. Pages 3-6.	Where do you currently track what is waiting on you?
3-8 min / Budget + Proposal	Connect scope to cost, price, allowances, and the agreement. Show the $10,000 countertop allowance. Pages 7-9.	Could your customer explain what is included?
8-13 min / Customer journey	Open the welcome, Files, and countertop selection. Explain full price versus overage. Pages 10-13.	What would help your customer make this decision?
13-17 min / Preview as User	Show the homeowner Dashboard and two Forms. Point out the different audience. Exit Preview. Pages 14-16.	Have you seen your setup through your customer's eyes?
17-21 min / Schedule + Logs	Connect the selection dates to cabinets, template, and inspections. Show the repair hold in the log. Pages 17-18.	What must be ready before the next trade arrives?
21-26 min / Change + Bill	Open the $6,000 repair and the $8,200 bill against the $7,000 order. Explain the approval gates. Pages 19-22.	Who decides, and what evidence do they need?
26-30 min / Rhythm + Handover	Show the weekly checklist and closeout steps. Name one improvement to carry into the next job. Pages 23-25.	Which part of this process would reduce the most friction for your business?

FROM MELISSA

Give the contractor time to connect the example to their own business. Ask how they handle this today before moving to another screen.

CLOSE THE DEMONSTRATION

“You do not need to build every feature at once. Start with a clear job, guide the customer through their next decision, and give every handoff an owner and a record.”

Open the Willow House demonstration →