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CONSTRUCTION PUNCH LIST

Project Information

Project Name:	
Project Address:	
Client/Owner:	
Project Manager:	
Date:	

Tradesperson Information

Name:	
Trade:	
Contact Information:	

Inspection and Sign-Off:

No.	Item Description	Location	Responsible Party	Due Date	Status	Comments
1						
2						
3						
4						

Construction Punch List Template: Free PDF Download

In this post, we share a free construction punch list template that subcontractors and project managers can use to keep track of their project to-dos.

The template includes the following sections:

- Project information
- Tradesperson information
- Itemized punch list table
- Inspection and sign-off

Below, we'll provide a link to download and use the template in your [contracting business](#). However, there are certain limitations to using a fillable PDF or spreadsheet for managing and tracking projects.

For example, even the most elaborate project management spreadsheet in Microsoft Excel or Google Sheets is completely disconnected from the other key documents, apps, and platforms used to manage your business:

- Communication and team coordination tools
- Pricebooks
- Billing and accounting platforms
- Reporting software/spreadsheet docs

It's tedious and time-consuming to manage and keep all of these documents and platforms up to date separately. And the continuous manual data entry leaves too much room for crucial errors that could hurt your bottom line.

After sharing the template below, we'll walk through how ServiceTitan's [construction management software](#) centralizes all of these core business processes into a single platform.

[Schedule a call](#) to get a free, live, one-on-one walk-through of how ServiceTitan helps contractors streamline project management and business operations.

Download Our Construction Project Punch List Template

CONSTRUCTION PUNCH LIST

Project Information

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Project Address:	
Client/Owner:	
Project Manager:	
Date:	

Tradesperson Information

Name:	
Trade:	
Contact Information:	

Inspection and Sign-Off:

No.	Item Description	Location	Responsible Party	Due Date	Status	Comments
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

[Click here](#) to download our digital punch list template, which includes sections and fields for the following:

Project Information

- Project Name
- Project Address
- Client/owner
- Project manager
- Date

Tradesperson Information

- Name
- Trade
- Contact information

Itemized Punch List Table

- Item description
- Inspected by
- Date inspected
- Approved
- Comments

Sign-Off

- Tradesperson signature and date
- Project manager signature and date

Although this template can help you manage your punch list items effectively, its lack of integration with other tools and platforms used in your business limits its overall utility.

In the rest of this post, we'll walk through what it's like to manage projects in ServiceTitan, where most project tasks and business management are integrated into one platform.

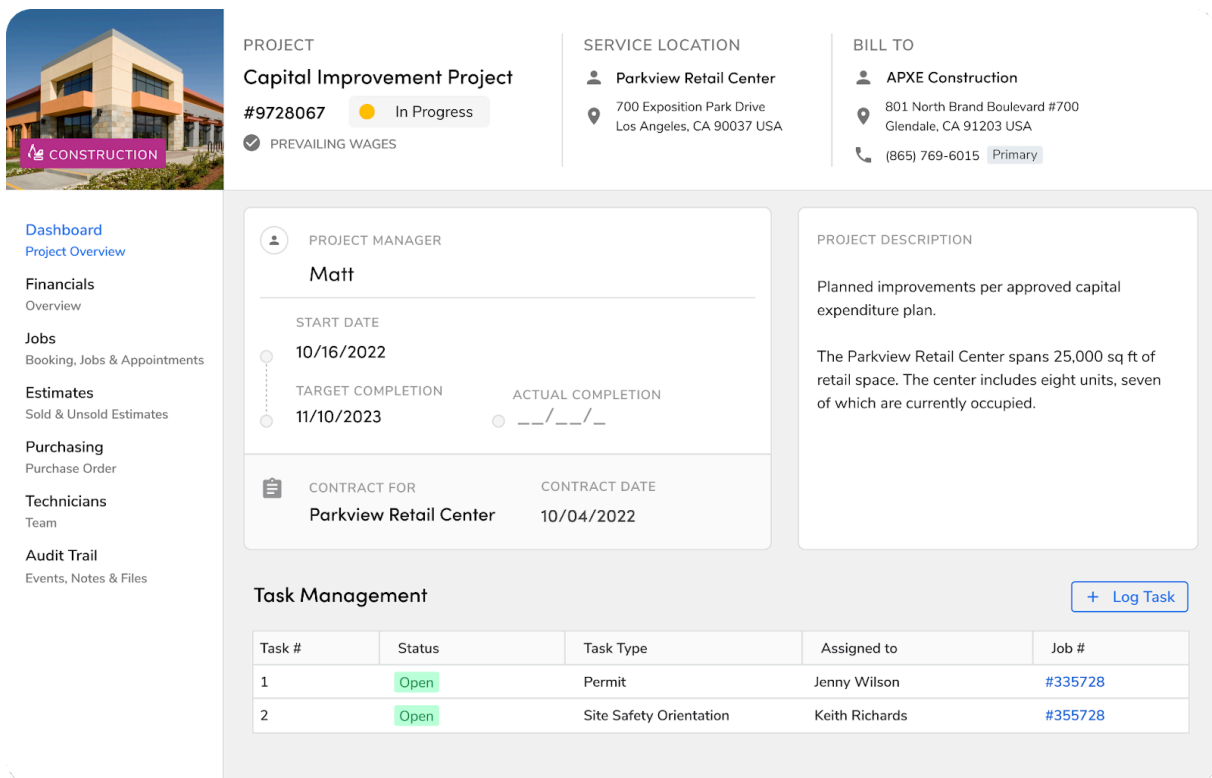
Visit our [Templates Hub](#) for more free downloads of our construction industry templates.

How ServiceTitan Centralizes Construction Project Management & Business Operations

To demonstrate how our platform can streamline and automate construction project management, we'll look at some of our foundational [construction management features](#), including:

- [Project dashboard](#)
- [Estimates](#)
- [Purchase orders](#)
- [Job costing](#)
- [Progress billing](#)
- [Mobile forms and checklists](#)
- [Work in progress reporting](#)

Manage Projects from the Project Overview Dashboard



The screenshot displays the Project Overview Dashboard for a Capital Improvement Project. The dashboard is organized into several sections:

- Project Information:** Includes the project name "Capital Improvement Project", ID "#9728067", and status "In Progress". It also lists the service location "Parkview Retail Center" at "700 Exposition Park Drive, Los Angeles, CA 90037 USA" and the bill to "APXE Construction" at "801 North Brand Boulevard #700, Glendale, CA 91203 USA".
- Project Manager:** Matt, with a start date of 10/16/2022 and a target completion date of 11/10/2023.
- Contract Information:** Contract for "Parkview Retail Center" dated 10/04/2022.
- Project Description:** Planned improvements per approved capital expenditure plan. The Parkview Retail Center spans 25,000 sq ft of retail space. The center includes eight units, seven of which are currently occupied.
- Task Management:** A table listing tasks with columns for Task #, Status, Task Type, Assigned to, and Job #.

Task #	Status	Task Type	Assigned to	Job #
1	Open	Permit	Jenny Wilson	#335728
2	Open	Site Safety Orientation	Keith Richards	#355728

[Source: Product Illustration | Project Overview - Capital Improvement Project (Desktop)]

A project overview page is automatically generated when a new project is created in ServiceTitan. From this dashboard, contractors and project managers can:

1. **View all basic project information** — including project name, job address, contact information, brief description of the project, project milestones/project due date, etc.
2. **View, log, and prioritize project tasks** — some contractors use this for to-do lists.
3. **Access project financials** — including [project job costing](#) and expense details that update automatically throughout a project.
4. **Initiate key actions** — such as generating an [estimate](#), purchase order, [application for payment](#), [invoice](#), and more.

5. **View team members/stakeholders** involved in the project.
6. **Access an audit trail** including events, notes, and project documentation.

Build Estimates with Accurate Pricing

ServiceTitan | Dashboard | Calls | Schedule | Dispatch | Accounting | Inventory | Follow Up | Reports | Marketing | Pricebook

Estimate: California Science Center

STATUS: Sold | PROJECT: 9728067 | FOLLOW UP ON: 07/23/2022 | OPPORTUNITY: 9728579 | SOLD BY: Shawn Carter

Actions: [Edit] [Print] [Email] [Share] | Mark as Change Order

General Information

SERVICE LOCATION [Property Data](#) [Beta](#)

California Science Center
700 Exposition Park Drive Los Angeles, CA 90037 USA

BILLING LOCATION

APXE Construction
801 North Brand Boulevard #700 Glendale, CA 91203 USA
(805) 699-6015 [View all contact methods](#)

SUMMARY

Your Summary Field is Empty
Make sure you have a detailed description of your Estimate.

Estimate Items

Initiate Requisition | **Initiate Booking**

+ Task | + Equipment | + Material | + Add Discount or Fee | + Item Group | Expand Descriptions

Task	Name & Code	Description	Taxab...	Add On	QTY	Unit Price	Total Price	Estimated La...	Project L...
	Description of Work	Permit Fees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.00	1200.00	\$1,200.00	\$0.00	Permit Fe
	Description of Work	Trenching	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.00	10000.00	\$10,000.00	\$0.00	Trenching

Price Details

SUB-TOTAL: \$121,600.00

TAXES

Tax: \$0.00 (0%)

TOTAL TAXES: \$0.00

TOTAL: \$121,600.00

Cost Details

Labor: \$63,620.00

Material: \$23,660.00

Equipment: \$3,000.00

TOTAL: \$90,280.00

Gross Margin: 25.76% (\$31,320.00)

[Source: Product Screenshot (Raw) | Estimate - California Science Center (Desktop)]

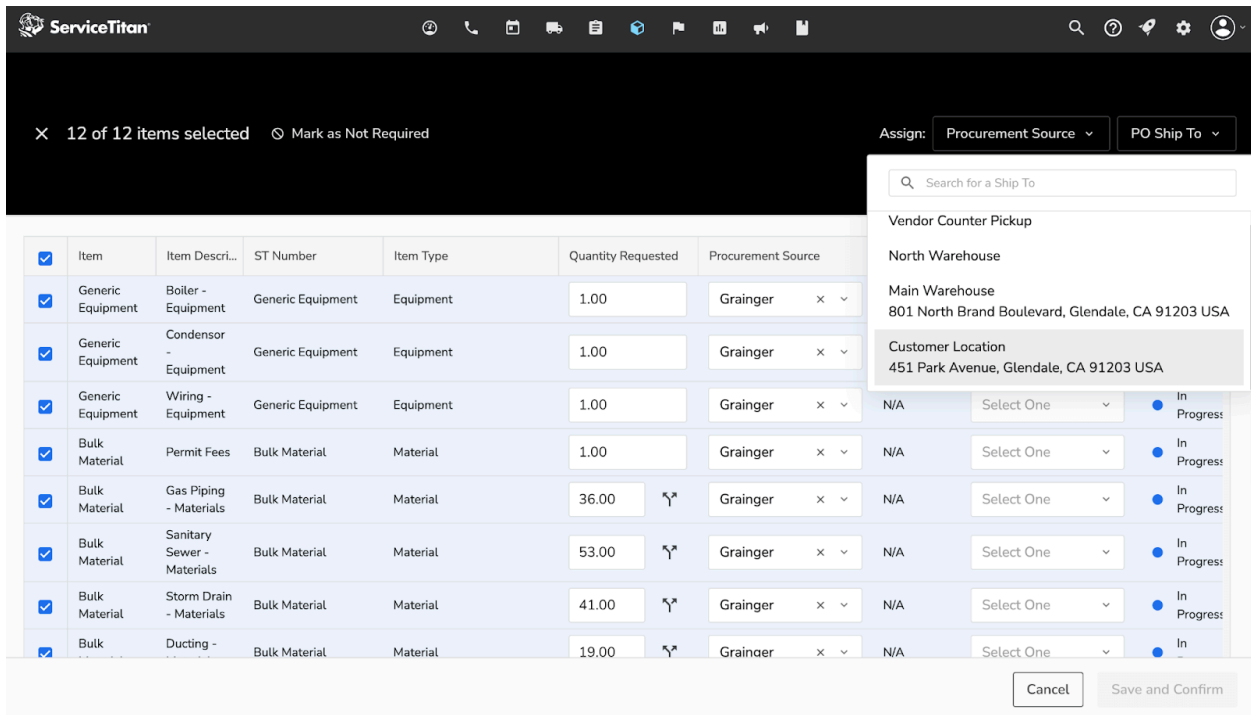
Project estimates allow you to build detailed construction estimates by adding the specific tasks, equipment, and materials needed to do the work. Users can draw from pre-built job [estimate templates](#) or build estimates from scratch.

Tasks, materials, and equipment can all be tagged with color-coded project labels to organize the project details and make everything easy to visualize. In addition, pricing and markups for each line item are automatically calculated based on the most up-to-date prices in your pricebook.

Once an estimate is completed, it can be printed, emailed, or exported in **PDF format** and sent to the client. If changes are made to approved **project plans**, estimates can be updated and/or additional estimates can be created as needed throughout the project.

Initiate Requisitions and Purchase Orders

When an estimate is sold, all of the details you've set up in the estimate are automatically integrated into the rest of the [project management workflow](#). For example, you can initiate a requisition of equipment and materials within your sold estimate.



[Source: Image | Construction Management Software | PO Select Location]

Let's say at the beginning of a project, you want to start ordering your permits and materials — you can select those items within your estimate, which will lead you through a [workflow](#) to create the purchase orders you'll need.


In the purchase order [workflow](#), line items are automatically populated from your estimate. You simply select your procurement sources and shipping locations for each material. Then, you can save that order to create a transaction and send those purchase orders to your vendors — without ever leaving ServiceTitan.

Automate Project Financials and Job Costing

As you progress through a job — creating purchase orders, [logging labor hours](#), processing change orders, receiving progress payments, and so on — ServiceTitan provides [real-time project financials and job costing](#).

Instead of manually updating a series of spreadsheets every time labor costs and material costs are incurred, this is done automatically for you, based on work that's completed and entered into the system.

If we continue with our example from above, and you've made your initial purchase order of permits and materials, your project summary table is updated to reflect those expenses:



PROJECT

Capital Improvement Project

#9728067 In Progress

PREVAILING WAGES

SERVICE LOCATION

Parkview Retail Center

700 Exposition Park Drive

Los Angeles, CA 90037 USA

BILL TO

APXE Construction

801 North Brand Boulevard #700

Glendale, CA 91203 USA

(865) 769-6015

Primary

Dashboard

Project Overview

Financials

Overview

Jobs

Booking, Jobs & Appointments

Estimates

Sold & Unsold Estimates

Purchasing

Purchase Order

Technicians

Team

Audit Trail

Events, Notes & Files

Financials

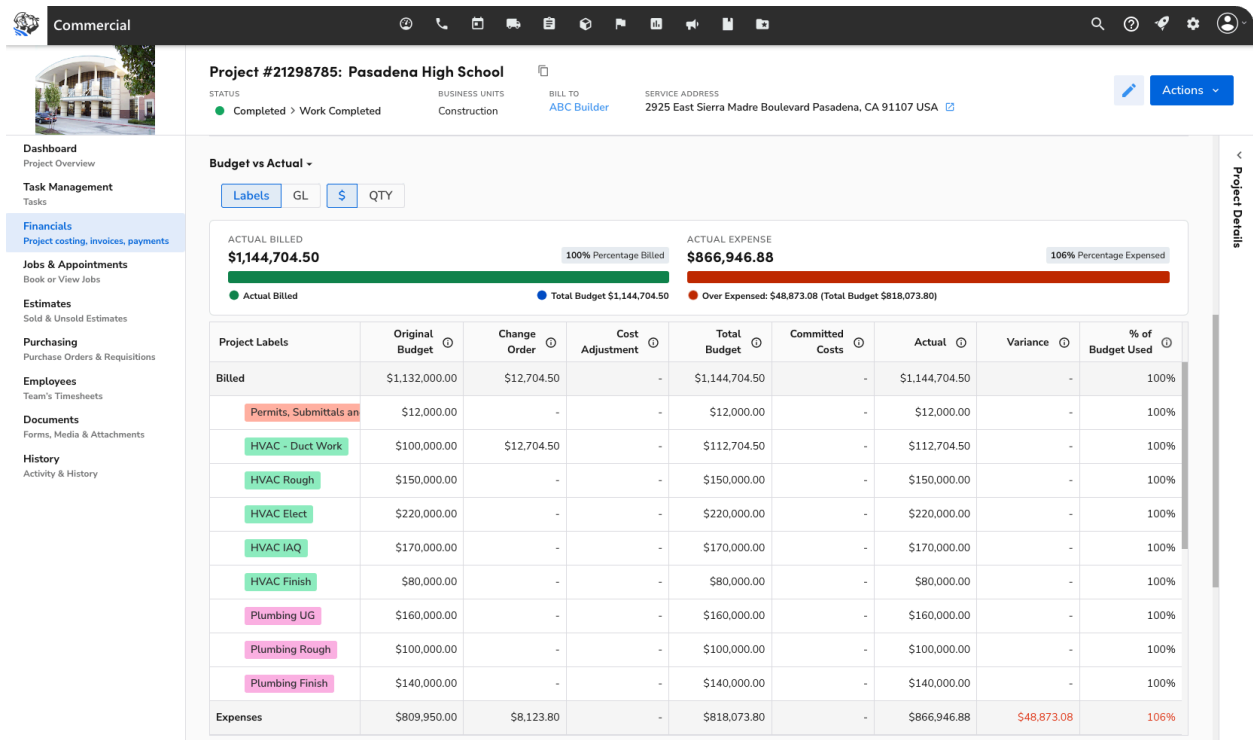
[View Project Costing](#)

	Amount	Percent Complete
Contract Summary	\$121,600.00	30%
Expenses	\$34,759.17	39%
Cost to Complete	\$55,520.83	Edit
Total Earned	\$41,600.00	34%
Total Retainage	\$4,160.00	3%
Invoiced	\$37,440.00	30.79%
Payments	\$12,500.00	
Totals		0.79%
AR Balance	\$24,940.00	
Balance to Finish (Including Retainage)	\$84,160.00	

[Source: Product Illustration | Financials Overview - Capital Improvement Project (Desktop)]

Furthermore, you can view a more detailed breakdown of your **project budget** versus **actual costs**.

This will automatically update as you accumulate expenses from materials, equipment, and labor hours. It will display your margins in dollar and percent form to help you track job costs and profitability throughout your project.



[Source: Product Illustration | Budget vs Actual - Pasadena High School (Desktop)]

You can also access a table breaking down your expenses in further detail:

Expense Details -				
\$ QTY				
Project Labels	Budget	Actual	Variance	% of Budget Used
▶ Rough In	\$0.00	\$327.18	\$327.18	0%
▶ Labor	\$1,520.00	\$1,171.99	\$-348.01	77%
▶ Permit Fees	\$960.00	\$960.00	\$0.00	100%
▶ Trenching	\$7,980.00	\$0.00	\$-7,980.00	0%
▶ Gas Piping	\$12,000.00	\$3,600.00	\$-8,400.00	30%
▶ Materials	\$3,600.00	\$3,600.00	\$0.00	100%
▶ Labor	\$8,400.00	\$0.00	\$-8,400.00	0%
▶ Sanitary Sewer	\$17,600.00	\$5,300.00	\$-12,300.00	30%
▶ Storm Drain	\$13,640.00	\$4,100.00	\$-9,540.00	30%
▶ Ducting	\$6,400.00	\$1,900.00	\$-4,500.00	30%
▶ Boiler	\$10,020.00	\$6,400.00	\$-3,620.00	64%
▶ Condensor	\$6,620.00	\$4,000.00	\$-2,620.00	60%
▶ Wiring	\$8,780.00	\$5,600.00	\$-3,180.00	64%

[Source: Product Screenshot (Raw) | Project Expense Details Expanded (Desktop)]

You can click on any line item and see the exact source of that expense (e.g., which technician logged those hours, or which purchase orders and vendors a given set of materials came from). This allows you to easily check your numbers and feel confident in your data.

When it comes time to send applications for payment and invoices at each stage of progress billing, this can also be easily accomplished from the project overview dashboard.

Automate Progress Billing and Invoicing

The initial estimate you created also informs and populates the continuation sheet in your [application for payment](#):

Application for Payment #1

Continuation Sheet | Application For Payment

Continuation Sheet

Period From: 07/12/2022 | Period To: 09/08/2022 | Application Date: 09/08/2022 | Retainage %: 10.00

Click on a row to edit it and view its items. | Bulk Actions

A	B	C	D	E	F	G
Item No.	Description of Work	Scheduled Value	From Previous Application (D+E)	This Period	Materials Presently Stored (Not in D or E)	Total Completed Stored To Date (D+E+F)
1	Permit Fees	\$1,200.00	\$0.00	\$1,200.00	\$0.00	\$1,200.00
2	Trenching	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00
3	Gas Piping	\$15,000.00	\$0.00	\$4,500.00	\$0.00	\$4,500.00
4	Sanitary Sewer	\$22,000.00	\$0.00	\$6,600.00	\$0.00	\$6,600.00
5	Storm Drain	\$17,000.00	\$0.00	\$5,100.00	\$0.00	\$5,100.00

Calendar pop-up for Application Date: September 2022. TODAY: 09/08/2022. Retainage %: 10.00.

[Source: Product Screenshot | Application for Payment - Continuation Sheet (Desktop)]

When sending a payment application, you can easily generate one by selecting the billing period and the percent of each line item you want to bill for.

Then, you can generate a PDF payment application with the details *automatically* filled out, and send it to your client for review. The continuation sheet details make the bill easier to defend against pushback from construction companies or general contractors.

As a result, [subcontractors](#) can **get paid faster** and reduce [cash flow](#) issues.

When applications are accepted, generating an invoice for the progress payment is just as easy. When payments come in, you can update your accounts receivable through our [Viewpoint](#), [Sage](#), [QuickBooks](#), and CSV accounting integrations.

Leverage Custom Forms and Checklists from the Job Site

< CLOSE Daily Log

Daily Log EMAIL SAVE

Date

04/18/2024

Project Number

10794563

Location Address

700 Exposition Park Drive, Los Angeles, CA 90037 USA

Overall Project Status

Weather

☒ Sunny
☐ Cloudy
☐ Rainy
☐ Snowy
☐ Windy

Min. Temperature (°F)

53

[Source: Product Illustration | Subcontractor Daily Log (Mobile)]

ServiceTitan allows contractors to create versatile, customized forms including any type of checklist or form needed for a specific project. For example:

- Construction site safety checklists
- Check-in forms
- Rolling punch lists
- Daily reports
- Quality control checklists
- Final inspection reports
- Change-order notification forms
- Requests for additional materials forms

To use project forms, companies can upload ones they already have, create forms from scratch, or choose from pre-built forms and checklist templates. Project managers and crews can then access those forms in the field via our [mobile app](#).

The screenshot shows a mobile application interface for a 'Safety Checklist'. At the top, there is a dark header bar with a back arrow and the text '< CLOSE' on the left, and 'Safety Checklist' in the center. Below the header, the main content area has a light background. On the left side of this area, the text 'Safety Checklist' is followed by a blue pencil icon. On the right side, there are two blue buttons: 'EMAIL' and 'SAVE'. The checklist itself consists of three items, each with a question and two radio button options. The first item is 'Do you have appropriate PPE? *' with 'Yes' selected. The second item is 'Is there a potential for ammonia exposure (NH3)? *' with 'No' selected. The third item is 'Will this task involve entry into a confined space? *'. To the right of each question, there are three icons: a camera, a pencil, and a star. A vertical scrollbar is visible on the right edge of the checklist area.

< CLOSE Safety Checklist

Safety Checklist

EMAIL SAVE

Do you have appropriate PPE? *

☒ Yes ☐ No

Is there a potential for ammonia exposure (NH3)? *

☐ Yes ☒ No

Will this task involve entry into a confined space? *

[source: Product Illustration | Safety Checklist]

There are over **10 different formats** that can be leveraged for each checklist item — including text, numbers, checkboxes, dropdowns, stoplight buttons, photo and video uploads, and more. Signatures can also be added if you require someone on-site to sign off on a particular form.

By capturing these details in our cloud-based system, ServiceTitan reduces any chance of misplacing important details related to a project.

Ensure Checklists Are Used Every Time

ADDITIONAL SYSTEMS

- ☐ Inspect any pumps, siphons, or other mechanical components
- ☐ Evaluate alarms and control panels
- ☐ Check float switches and electrical connections
- ☐ Examine any aerobic treatment units, if applicable

.....

SUMMARY AND ANY REPAIR RECOMMENDATIONS:

.....

CUSTOMER SIGNATURE

sign here

.....

TECHNICIAN SIGNATURE

sign here



[Source: Septic System Inspection Checklist Report: Additional Systems]

Within the form settings, business owners can select the option to **require project managers or crew members to fill out specific forms** for certain job phases.

For example, if rough-in has been finished, **project managers** can be required to complete a rough-in inspection checklist before they're able to move on to the next phase of that project.


This fosters accountability through automation — reducing stress on owners and executives — while ensuring SOPs are followed for every job.

Automate Work In Progress Reporting

 **ServiceTitan** 


Work in Progress Report ⋮

From

 11/09/2022





>

To

 03/09/2023

[Run Report](#)

Name	Contract Sum	Total budget	Under billing	Forecasted cost	Total actual cost
Central Grille	\$129,200.00	\$94,760.00	\$10,931.39	\$73,980.72	\$20,779.28
ACME Cinemas	\$54,200.00	\$37,940.00	\$1,359.46	\$5,791.13	\$13,960.87
Joe's Coffeehouse	\$9,000.00	\$7,760.00	\$0	\$1,800.00	\$13,960.00
Skyline Apt.	\$134,800.00	\$97,100.00	\$9,155.04	\$75,258.33	\$19,501.67
Parkview Retail	\$67,336.00	\$44,600.00	\$7,228.07	\$38,509.27	\$14,250.73

  **1**  

[Source: Product Illustration | Work in Progress Report (Desktop)]

ServiceTitan offers **work-in-progress (WIP) reports** to help construction businesses maintain an accurate, up-to-date view of their projects by calculating recognized revenue based on the percentage-of-completion method.

For business owners and executives running larger organizations with many jobs in progress, this report is invaluable for getting a **real-time** view of the financial health of the business and ensuring that budgets are managed effectively. In addition, **project managers** can use WIP reports to manage over- and under-billing.

To run the report, users select from a series of fields, including date ranges, project statuses, and completion dates. The report then generates a table with the following project details:

- Project number and name
- Contract value
- Estimated total cost
- Total cost
- Percent complete cost
- Earned revenue
- Revenue
- Retainage percent

- Retainage

WIP reports can be customized with a variety of different columns and calculations based on the needs of your business. These reports can easily be exported to be further manipulated in spreadsheets if desired.

Like all other features within ServiceTitan, the data used to generate WIP reports are automatically pulled from other areas of the platform. As a result, the amount of work and potential for errors in generating these reports is significantly reduced.

Get a Personalized Demo of ServiceTitan Construction Software

What we've covered above is just a sampling of the features that ServiceTitan offers for facilitating construction project management. We also offer [construction business reporting](#), [timesheets](#), [inventory management](#), and more.

If you're interested in learning more about how ServiceTitan's cloud-based platform can help you manage and grow profitability in your contracting business, [schedule a call](#) with us for a live, one-on-one walk-through of the features and functionality we've discussed throughout this post.