NORTHSTAR INTEGRITY GROUP

Contractor Billing & Back-Office Checklist

A one-page guide for small contractors in League City and the Houston Bay Area

Billing & Invoices

- Invoice every job within a day or two of completion.
- Name the job, the dates, materials, labor, and the payment terms.
- Keep a clear list of what has been sent, what is open, and what is past due.
- Follow up on unpaid invoices on a set schedule, not when you happen to remember.
- Write down change orders and extra work before you bill them.

Job Costs & Books

- Code expenses to the job, not only to a general account.
- Save receipts the day they come in.
- Reconcile the bank and card accounts each month.
- Keep personal spending off the business books.
- Review what a job actually made after it closes, not only at tax time.

Payroll & Crew

- Collect hours on a regular cutoff, not at the last minute.
- Keep employee and subcontractor status clear and documented.
- File and pay payroll taxes on the calendar.
- Hold W-9s, insurance certificates, and licenses in one place.

Contracts & Purchasing

- Get a signed agreement before work starts, and record changes in writing.
- Keep permits, lien waivers, and close-out documents in the job file.
- Match purchase orders and invoices to the job they belong to.
- Confirm deliveries against what was ordered, and watch vendor terms.

When to call for help

If invoicing is more than a week behind, if you cannot say what a job actually made, or if payroll and tax dates keep slipping — that is the moment to hand the office off.

Excellence You Can Trust

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