# Job Sheet Template

Hello! We want to ensure customer relationships stay positive, communication remains open, and all of our jobs run smoothly.

You have an important role in making this happen. When we accept a new job, collecting accurate project information is critical. Inaccurate or incomplete job information not only slows down payment, it can hurt the relationships you've worked hard to foster.

Attached is a copy of a job sheet template so you can make sure you're collecting important information at the start of the job to help us have smooth payment and maintain good customer relationships.

If you'd like to learn more about visibility documents and how they help our business, visit: Levelset.com/rollout.

Please reach out if you have any questions and thanks for your help.

# Project Information Sheet

Use this template to collect information at the start of every new job.

Job Name: _____

Job Address: _____ Zip: _____

## Job Type

**Private**

_____ Residential

_____ Owner Occupied

_____ Residential

_____ Commercial

**Public**

_____ State / County

_____ Federal

_____ P3 - Other

## Your Role on the Job

**Top Tier**

_____ Property Owner

_____ General Contractor

**Lower Tier**

_____ Subcontractor

_____ Sub-Subcontractor

_____ Material Supplier

_____ Equipment Lessor

_____ Architect / Engineer

_____ Other

## Important Dates

Project Start Date

_____ / _____ / _____

Project End Date

_____ / _____ / _____

Labor / Materials First Delivered Date

_____ / _____ / _____

Labor / Materials First Delivered Date

_____ / _____ / _____

Labor / Materials First Delivered Date

_____ / _____ / _____

Contract Value: _____

Contract Number: _____

## Who Hired You

Name: _____

Company Name: _____

Role on Project (check which applies): Property Owner _____ GC _____ Subcontractor _____ Other _____

Address: _____ Zip: _____

Phone: _____ Email: _____

# Project Information Sheet

Use this template to collect information at the start of every new job.

## Property Owner Or Developer

Name: _____

Company Name: _____

Address: _____  Zip: _____

Phone: _____  Fax: _____  Email: _____

## General Contractor

Name: _____

Company Name: _____

Address: _____  Zip: _____

Phone: _____  Fax: _____  Email: _____

## Lender (If Any)

Name: _____

Company Name: _____

Address: _____  Zip: _____

Phone: _____  Fax: _____  Email: _____

## Surety / Bonding Company (If Any)

Name: _____

Company Name: _____

Address: _____  Zip: _____

Phone: _____  Fax: _____  Email: _____