



Prime Entry Bookkeeping Better Books → Better Bids Checklist

Purpose of This Checklist

This checklist helps contractors verify that their books reflect the true cost of delivering work, so their bids are accurate, defensible, and profitable. When the financial picture is clear, pricing becomes confident, margins stabilize, and win rates improve.

Cost Clarity Essentials

- My books reflect the real cost of doing business
 - Installer labor is recorded accurately
 - Subcontractor labor is tied to the correct job
 - Materials and freight are assigned to the job, not general expenses
 - Fuel, tolls, and vehicle costs are tracked as operational job costs
 - Commissions and license fees are categorized consistently
 - No job-related expenses are buried in overhead
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Direct Job Costs (Must Be Captured)

- Installer labor
- Subcontractor labor
- Commissions
- Tools and supplies
- Materials

Operational Job Costs (Must Be Captured)

- Fuel and tolls
- Service vehicle expenses
- Repairs
- Permits
- Qualifier fees

Allocated Overhead (Must Inform Pricing)

- Workers' compensation
- Insurance
- Warranties
- Warehousing or storage
- Waste management
- Bad debts
- Admin time
- Project management

Bid Confidence Indicators

- I can explain every line of my bid
- My pricing is based on data, not instinct
- My bid reflects the true cost of delivering the job
- My bids are consistent across similar jobs
- I can defend my number when customers compare bids
- I'm not relying on competitor pricing or guesswork

Risk Reduction & Margin Protection

- My books prevent disputes by showing the full story
- My job costing prevents underbidding
- My margins stay stable from estimate to completion
- My profitability is predictable
- My win rate improves because my bids are clear and defensible

Final Alignment Check

- My books inform my bids
- My bids reflect reality
- My pricing is confident, consistent, and competitive
- My business is protected from margin drift and disputes

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