

SOUTHERN GRACE LEDGERS

THE CONTRACTOR'S TOOLBOX

Dashboard-to-Desk Rescue Kit

For the hardworking folks whose receipts have been riding shotgun a little too long.

What's inside: a quick receipt rescue, a job paperwork log, and a 15-minute Friday routine.

How to use this kit

1. Gather receipts and job paperwork from the truck, phone, email, and pockets.
2. Take clear photos of paper receipts and save them in a folder by month and job.
3. Fill in the job paperwork log as you go. One line per document.
4. Use the Friday checklist to catch missing details before they become a headache.

More time for business. More time for family.

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DRAWER 1 | Receipt Rescue Checklist

Pick one job or one week. Start small. You do not have to clean up the whole year today.

- ☐ Empty the glove box, console, door pockets, and work bag.
- ☐ Gather email receipts, texted invoices, and online purchase confirmations.
- ☐ Photograph paper receipts so the vendor, date, items, and total are readable.
- ☐ Label each receipt with the job or customer, if applicable.
- ☐ Note the business purpose for purchases that may not be obvious.
- ☐ Put files in a folder named YYYY-MM / Job Name (or Job Number).
- ☐ Separate personal purchases from business purchases.
- ☐ Check for missing receipts and request duplicates while they are easy to find.
- ☐ Match receipts to bank or card transactions when reviewing the books.

My missing-receipt follow-ups

Vendor / Purchase	Date	Who to ask / next step

DRAWER 2 | Job Paperwork Log

Track receipts, change orders, customer approvals, supplier invoices, and payments in one place.

Date	Job / Customer	Document or purchase	Amount	Filed?

Helpful folder labels

Job name / number → Estimates • Signed approvals • Receipts • Supplier invoices • Customer invoices • Payments.

Keep the actual documents securely. This log is only an index, not a substitute for invoices or accounting records.

DRAWER 3 | Friday Truck-to-Desk Reset

Set a 15-minute timer. A little every Friday beats a whole weekend digging through receipts.

- ☐ 3 minutes — Empty the truck and collect new paperwork.
- ☐ 4 minutes — Photograph, name, and file receipts.
- ☐ 3 minutes — Match purchases to jobs and flag anything unclear.
- ☐ 3 minutes — Note change orders, unpaid invoices, and bills due.
- ☐ 2 minutes — Write down one thing to follow up on Monday.

My Monday follow-up

What needs attention?	Who / when?

A little friendly reminder

This organizer is a practical recordkeeping aid, not tax or legal advice. Keep documents according to your applicable record-retention requirements and ask your tax professional about deductions.

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