

Off-Season ERP Checklist for Pavement Contractors

Use this checklist every October/November to close out your season properly inside Commander ERP.

Project & Job Closeout

- Close all active projects and mark them complete in the Projects module.
- Verify all time logs are matched to correct projects and employees.
- Ensure all completed jobs have been invoiced — no unbilled work left open.
- Archive project documents and photos for future reference.

Financial Reconciliation

- Reconcile all payroll records against time logs.
- Review Fuel & Maintenance logs for all equipment — identify overruns.
- Run the Company Performance Report — download Sales, Operations, and Payroll summaries.
- Prepare year-end payroll data for your accountant or bookkeeper.

CRM & Sales Pipeline

- Update all CRM contacts — flag active clients, dormant leads, and lost bids.
- Send off-season check-ins to your top 10 clients.
- Add all pending spring opportunities to the Opportunities module with estimated value.

- Schedule follow-up tasks for February/March in the Task Schedule module.

Supplier & Procurement Planning

- Review material costs per project from the prior season.
- Contact top suppliers to confirm spring pricing or negotiate volume discounts.
- Update Supplier records with new contacts, pricing tiers, or terms.
- Flag equipment requiring maintenance or replacement before spring.

Team & Workforce Planning

- Note which employees performed best — document for spring rehire priority.
- Review Time Tracker data for overtime trends and crew efficiency.
- Plan any training or certifications needed before the season starts.

Dashboard & Reporting Review

- Export your annual Company Performance Dashboard for year-over-year comparison.
- Review Pavement Business Scores — identify where your business gained or lost ground.
- Set targets for next season based on this year's actuals.