Digital Punch List

by Scott Shelley

General contractors spend many a sleepless night worrying about the punch list. You call your subs to ask them why they're not returning your calls about the fixtures at the Jones job, and they respond by telling you "I never got the message." You call your clients to ask when you can expect final payment, and they tell you that the painter has not removed the over-spray from the doorknob inside the closet, so they are holding back $5,000.

I have tried various systems to stay on top of all these items, from a simple list on a tablet to computer databases. In a recent review of the Palm Pilot (*Computer Solutions*, 2/98), I mentioned a demo for a product that uses both a PC and a Palm Pilot to keep track of all of these end-of-job details. It's called Punch List ($179 from Strata Systems; 512/327-8334; www.punchlist.com), and I have since had a chance to take a look at a complete working version. Here's what I discovered.

System Setup

The way the Punch List system works is pretty slick. First, you install the software on your PC. This "Punch List Desktop," as it's called, is then synchronized or "hot synced" to your Palm Pilot via a cabled connection.

The desktop software comes with five preset categories to keep track of your punch list items: Project, Area, Sub, Category, and Item. In the Project and Sub sections, you build lists of basic information about your current jobs and the subcontractors that you use. The

Punch List is the perfect software tool for listing and tracking punch list items during a job walk-through. Data collected in the field using 3Com's hand-held Palm Pilot can be transferred to the "Punch List Desktop" on a full-sized PC (shown here), where it can be sorted, printed or faxed, and copied to other applications.
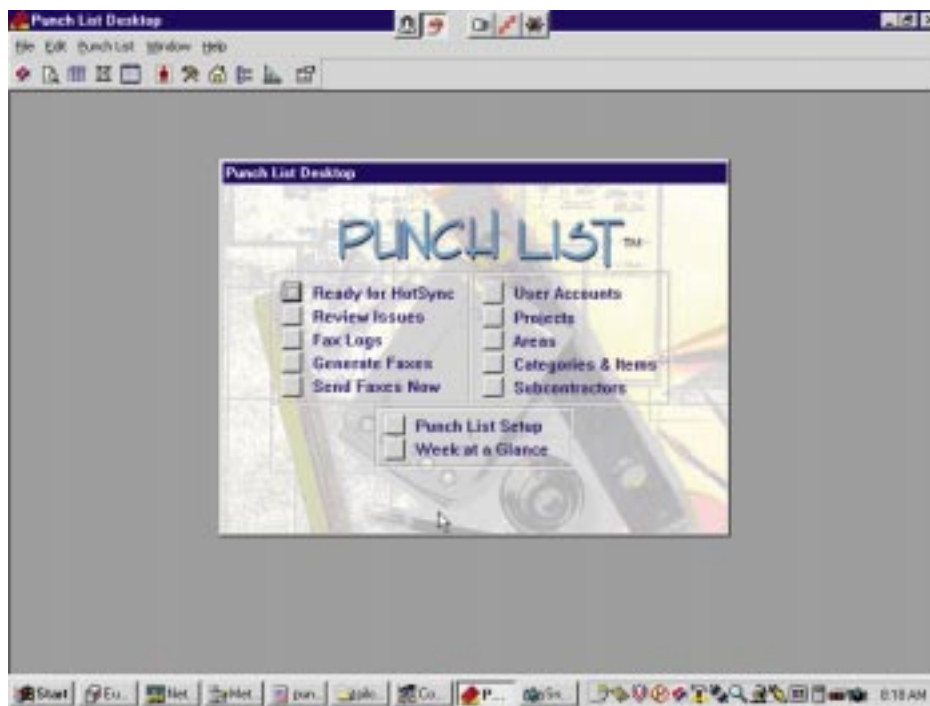
built-in Area list includes about 24 tags, such as "Bedroom-Front Left," which you can use to sort items. You can add as many areas as you see fit, customizing the list to suit the way you work.

The Category section is a list of eight predefined construction phases, such as General, Foundation, Frame, Drywall, and so on, to which you can add phases of your own. These major phases are broken down further into subcategories called Items. The program comes with about 120 items, such as "Install ground wire" and "Set temporary power pole," and you can add to and modify this list as well.
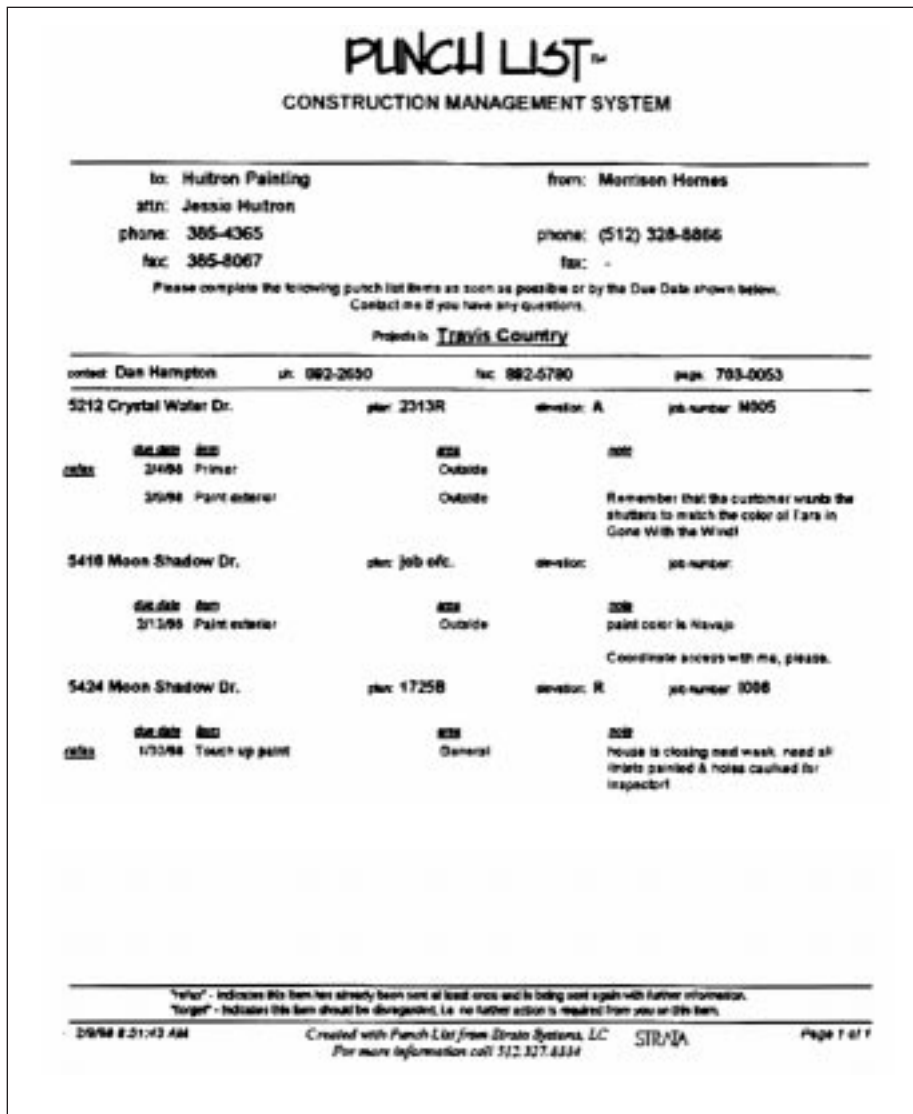
In the Field

Once I installed the program and had synced all of the desktop information with my Palm Pilot, I was ready to go to work. On the first job site I visited, I came across an electrical fixture in the bathroom that was not installed properly. Using Punch List and the Palm Pilot stylus, I clicked on the "plus" signs on the main screen to display drop-down lists from which I could select the Job, Area, Sub, Category, and Item. After entering the date the repair would come due, I had the option to select "confirm," which would remind me to call the sub to explain in detail my expectations for correcting the problem. I could also enter additional notes for the item — for example, "Fixture is upside down."

As I made my way through the site, I entered additional items as I came across them, building a list of details that needed to be addressed by either a sub or one of my employees. Had I visited another site on the same day, I would simply choose a different name from the Job list and create a separate list of items specific to that site.

PUNCH LIST™

CONSTRUCTION MANAGEMENT SYSTEM

to: Huitron Painting   from: Morrison Homes
attn: Jessie Huitron
phone: 385-4365   phone: (512) 328-8866
fax: 385-8067   fax: -

Please complete the following punch list items as soon as possible or by the Due Date shown below. Contact me if you have any questions.

Projects in **Travis Country**

contact: Dan Hampton   ph: 892-2650   fax: 892-5790   pgr: 783-0053

5212 Crystal Water Dr.   plan: 2313R   elevation: A   job number: M905

refax	due date	item	area	note
refax	2/4/98	Primer	Outside	
	3/5/98	Paint exterior	Outside	Remember that the customer wants the shutters to match the color of Tara in Gone With the Wind

5416 Moon Shadow Dr.   plan: job ofc.   elevation: job number:

	due date	item	area	note
	2/13/98	Paint exterior	Outside	paint color is Navajo
				Coordinate access with me, please.

5424 Moon Shadow Dr.   plan: 1725B   elevation: R   job number: I008

refax	due date	item	area	note
refax	1/30/98	Touch up paint	General	house is closing next week, need all inlets painted & holes caulked for inspector!

"refax" - indicates this item has already been sent at least once and is being sent again with further information.
"forget" - indicates this item should be disregarded, i.e. no further action is required from you on this item.

2/9/98 8:51:43 AM   Created with Punch List from Strata Systems, LC   STRATA   Page 1 of 1
For more information call 512.327.4454

After synchronizing data gathered in the field with your desktop PC, you can fax the punch list directly to your subs. The Punch List software keeps track of which items were faxed to whom, so that back in the field you can check on the progress of the work using up-to-date information.

Issue Edit

⊞ **Proj:** ▼ 5440 Moon Shadow Dr
⊞ **Area:** ▼ General
⊞ **Sub:** ▼ Acme Brick
⊞ **ICat:** ▼ Drywall
⊞ **Item:** ▼ Final inspection

Date Due: 11/06/97   ☐ Forget
☐ Confirm   ☐ OK   ☐ Done
Faxed: 11/07/97   ☐ Refax

[MAIN] [LIST] [◀][▶] [EDIT] [NOTE]

Creating a punch list is a simple matter of selecting the appropriate information from one of five customizable drop-down lists — Project, Area, Subcontractors, Categories, and Items. Each punch list item is tagged with a due date and can include descriptive notes.

In the Office

Once I returned to the office, I synchronized the information I had collected in the field with the Punch List desktop on my computer. Now I can use a full-size keyboard and screen to sort the information by Job, Sub, Category, Item, Date Due, or other criteria. For example, I can create a list containing just the items that the electrical sub has to correct. I can print the list and mail it, or — and this is the most powerful part of the program — I can use Punch List to automatically fax the list to my electrical sub. To keep track of which information was sent where, a status box next to each item in Punch List indicates which items have been faxed.

The fax capability is a real time saver. You can avoid having to make a bunch of phone calls, during which Joe the electrician may go on for a half-hour about his fishing trip to Alaska. It also gives you a record of when your sub received the information, which eliminates the "I didn't get the message" excuse.

Back in the Field

Once you've faxed the information to your subs and have synchronized the desktop with your Palm Pilot, you can head back into the field with Punch List to check on progress. In addition to a status box indicating when each item was faxed, Punch List displays three other check boxes: refax, forget, and done. For example, if you visit the job to inspect the punch list work and an item has not been taken care of, you can select "refax" to send another message to the appropriate sub. If an item requires only a small amount of additional attention, you might select "forget;" if the sub has taken care of the item, you would select "done."

With the ability to regularly exchange information between your desktop and the Palm Pilot, and the discipline to use it, Punch List is one of the most useful project management tools around.

Scott Shelley owns Scott C. Shelley Construction, a remodeling company in Petaluma, Calif.