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FREE WORKSHEET

Valid-until date worksheet

Two questions per job, a date you can defend, and the wording for when a client says yes too late.

1. The cost that can move

Largest materials or bought-in costs on this job	Amount	How long the supplier holds the price

Limit A (shortest price hold): _____ days

2. The start date you can keep

Earliest start you are offering: _____ Latest you can hold that slot: _____

Limit B: _____ days

3. The date

Take the shorter of A and B, then round down to 7, 14, 30, 60 or 90 days.

Valid until: _____

4. Wording for your terms

> This estimate holds until [date]. After that date we will check material prices and our schedule and confirm the price again before starting.

> Prices for [named material] are set by our supplier and can change. If they change by more than [x]% before you accept, we will tell you the new figure before you sign.

5. When a yes arrives after the date

1. Thank them, and say you still want the job.
2. Check the costs that can move and your calendar.
3. Same price? Say so and send a fresh estimate with a new date.
4. Different price? Send the new estimate and name the line that changed and why.

Track your dates

Client	Estimate no.	Sent	Valid until	Follow-up on	Result

The full guide: fynl.io/blog/how-long-should-an-estimate-be-valid/

Free estimate maker: fynl.io/free-estimate-maker