

Job estimate worksheet

Take it on the site visit. Every line, every exclusion and every term, on paper before you price anything.

1. The job

Client name	Date of visit
Site address	Phone / email
What they asked for, in their words	
When they want it done	Who decides

2. One line per part of the job

Line (what the client will read)	Qty	Unit	Materials cost	Hours	Unit price

Forgotten-line prompts: access and parking, protection and clean-up, disposal, permits, travel, small parts and fixings, a second visit.

3. Not included

Write each one as a plain sentence, for example "Repairs to rot found behind the old tiles are not included."

1. _____
2. _____
3. _____

4. Terms

Estimate or fixed quote?

Price holds until

Deposit, and when it is due

When the balance is due

How changes are agreed

5. Before you send it

- ☐ Every line reads clearly to someone who was not on the visit
- ☐ Totals checked on the preview, tax set the way your area charges it
- ☐ Exclusions and terms are in the Terms box, not only in your head
- ☐ Valid-until date set, client's name and email spelled right
- ☐ Follow-up date written in your calendar

The full guide: fynl.io/blog/how-to-write-an-estimate-for-a-job/

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