

Job Estimate Template

An estimate gives your preliminary thoughts on the cost of a job and guides the customer's expectations on your company's pricing structure. It often changes when you get additional information from the customer, and can be affected by unexpected complications or additional work that becomes apparent as you proceed with the job.

Estimates are generally considered informal documents that do not necessarily indicate the final price for the completed job, but that does not mean they are not important. You should always get a written agreement on any jobs that you pursue. It makes dealing with questions and misunderstandings easier later on.

HubSpot Tip: Estimates are often confused with quotes, which are a more detailed version of your pricing that is developed based on additional information on the customer's needs. However, these two documents serve different purposes. Quotes are more formal and are often considered final.

Company Information

This section provides basic information on your company and tells the customer who to contact with questions. Include the following basic data:

Company Name: Insert your company's full name.

Street Address: Include your company's mailing address, including the zip code.

Estimated By: Enter the name of the person who developed the estimate.

Phone Number: Choose a number that can quickly connect the customer to the person who developed the estimate so they can answer any questions.

Email Address: Include the email address of the person who developed the estimate.

HubSpot Tip: This is just a list of the basic information that you need to include. Feel free to add additional details that are useful in your specific industry.

Estimate Identification

Here, you should provide details on the specific estimate:

Estimate Number: Some companies keep track of all of their estimates with a numbering system. If your organization does this, enter the number here.

Date: Include the date you are sending the estimate to the customer, including the day, month, and year.

Customer Account Number: Some companies assign customer account numbers for tracking purposes. If your firm does this, include the account number.

HubSpot Tip: Whether or not you use a numbering system to track your estimates, you should keep a copy of any estimate you issue. You never know when you might need to reference a past estimate.

Customer Information

Add the contact information of your customer in this section.

Contact Name: Insert the name of the person to whom you are sending the estimate.

Company Name: Enter the name of the customer company.

Street Address: Enter their street address, including the zip code.

HubSpot Tip: If your firm would find it useful, you can also include the phone number and email address of your customer in this section. However, this is not necessary information for the estimate.

Estimated Costs

Be as clear as possible about the costs of the various products and services necessary for the job. In an estimate, it is acceptable to describe the work in general terms, knowing that a more detailed quote will be prepared later. Be sure to include a disclaimer stating that the price is subject to change.

Product or Service	Quantity	Unit Price	Amount
Service Fee	1	\$200.00	\$200.00
Drywall Labor by hour	15	\$75.00	\$1,125.00
Paint Labor by hour	5	\$60.00	\$300.00
Paint in gallons	2	\$50.00	\$100.00
		Subtotal	\$1,725.00
		Tax	N/A
		Total Quote	\$1,725.00

HubSpot Tip: If you are required to charge value-added tax (VAT), you should include it in your estimate.

Estimate Acceptance

Explain the next steps required for the customer to indicate their acceptance of the estimate. Typically, the customer needs to return a signed copy of the quote indicating that they agree with the description of the work and the estimated price.

Indicate where and how (usually by email or fax) the customer should send the signed estimate. Then, include customized signature lines for everyone who needs to sign, like shown below.

[Name], [Role] [Name], [Role] [Name], [Role]

HubSpot Tip: You could include a line here indicating who to contact with questions about the estimate with an email address and phone number for that person. It is always best to make it easy for the customer to ask questions.