

Job Quote Site Survey

A job quote site survey: the customer, what they want, measurements and photos for each item, access and working conditions, priced options with VAT, and the cancellation information for quotes agreed at home.

1. Customer and job

Project

Client

Site *

Site address

Visit date *

Time

Surveyed by *

Customer phone

Customer email

Type of job *

What the customer wants *

When they would like it done

Walk Cam: quote visit

Walk Cam video walk-through: available in the SiteSurvey app only.

2. Measurements and items

Items or areas (copy this block for each one)

Item or area *

Work needed

Quantity

Unit (choose one)

☐ Each ☐ m ☐ m² ☐ m³ ☐ Hours ☐ Days

Measurements

Length (m)

Measuring from a photo gives an estimate. Use a tape or laser where the figure matters.

Width (m)

Area (m²) (if applicable; worked out automatically in the app)

Materials

Photos (photos: attach, or note the file names)

Items or areas recorded (worked out automatically in the app)

Total measured area (m²) (worked out automatically in the app)

3. Access and conditions

Is there parking close by?

☐ Yes ☐ No

Allowed working hours

Available on site (tick all that apply)

☐ Power ☐ Water ☐ Toilet ☐ Storage ☐ None

Things to plan for (tick all that apply)

- ☐ Pets
- ☐ Children at home
- ☐ Furniture to move
- ☐ Waste removal
- ☐ Narrow or upstairs access
- ☐ Possible asbestos
- ☐ None

If applicable: Possible asbestos. Asbestos was used in buildings until it was banned in 1999, and HSE says buildings constructed after 2000 are unlikely to contain it. Do not disturb suspect materials until they have been checked.

Notes

4. Options and price

Options (copy this block for each one)

Option *

What is included

Price before VAT (£) *

VAT (choose one)

☐ 20% ☐ 5% ☐ None (0%, exempt or not VAT registered)

Price including VAT (£) (if applicable; worked out automatically in the app)

Lead time

Options quoted (worked out automatically in the app)

Quote valid until

Days the quote is valid from the visit (if applicable; worked out automatically in the app)

If applicable: The quote valid until date is before the visit date. Check the date.

Deposit and payment terms

Exclusions and assumptions

5. Agreement

Is the customer agreeing the work at their home, or anywhere away from your business premises?

☐ Yes ☐ No

If applicable: Consumer Contracts Regulations 2013. A consumer can cancel a contract made away from your business premises without giving a reason; for a service the period ends 14 days after the day the contract is made (regulations 29 and 30). You must give them the cancellation information and a model cancellation form; if you do not, the period can run on for up to 12 months (regulation 31). Do not start work within the cancellation period unless they ask you to, on paper or by email (regulation 36).

Have you given the cancellation information and the model cancellation form? (if applicable)

☐ Yes ☐ No

Has the customer asked, in writing, for work to start within the 14 days? (if applicable)

☐ Yes ☐ No

Option chosen, if agreed today

Customer name

Customer signature

Surveyor name *

Surveyor signature