PROPERTY PROMO KIT

Walk the job. Write the scope.

A printable worksheet for handymen, remodelers and small crews.

Job / customer: _____ Date: _____

Work area: _____ Prepared by: _____

1 Finished result

What will be repaired, replaced or installed? Name each room, surface or item.

2 Measurements, materials and visible conditions

Record units, quantities, material/finish choices, photo references and access limits.

3 Included work

Break out removal, preparation, installation, finishing, protection and cleanup.

4 Questions and exclusions

What needs inspection? What is excluded? Who supplies materials and handles disposal?

Before pricing: resolve unknowns or identify a clear allowance.

Photos and an AI draft do not verify measurements or set a final price.

General planning aid. Adapt to the job and your business agreement process.

Price, review and follow through.

Job / customer: _____

5 Build the cost from the tasks

Check supplier prices, quantities, crew hours, rentals, delivery and disposal.

6 Customer terms and extra work

Record timing, payment terms and how extra work and schedule changes need approval.

7 Final review

Confirm scope, arithmetic, allowances and exclusions before sending the customer version.

[ ] Measurements checked [ ] Costs checked [ ] Customer PDF reviewed

[ ] Internal costs and margins kept out of the customer version

8 Set the next action

When will you follow up? What decision or missing detail do you need?

Try the workflow on one real job.

PropertyPromoKit turns job photos and notes into an editable estimate draft.

Review quantities and prices before sending. One saved project free. No card.

Optional $24.99/month: 1 owner + up to 5 crew members.

propertypromokit.com/first-estimate

General planning aid. Adapt to the job and your business agreement process.