

Installer quote checklist

A field-to-send review for independent holiday-light installers. Use measurements, cost assumptions, tax rules, and safety practices you have independently verified.

1 Customer and property

- ☐ Customer name, service address, phone and email are correct.
- ☐ Power source and outlet/GFCI notes are recorded.
- ☐ Gates, landscaping, pets, parking and access limits are documented.
- ☐ Requested timing is recorded as a note, not an unconfirmed promise.

2 Manual measurements

- ☐ Roofline footage is labeled by elevation or area.
- ☐ Tree scope records strand count and the measurement method used.
- ☐ Wreaths, garland, stakes, timers, cords and accessories are counted.
- ☐ Height, pitch, access and difficulty are noted separately from quantity.
- ☐ Waste allowance and unusual mounting surfaces are documented.

3 Cost and package scope

- ☐ Materials, consumables and equipment are included.
- ☐ Install, service-call and takedown labor use burdened costs.
- ☐ Vehicle, selling and overhead allowances are included intentionally.
- ☐ Good, Better and Best inclusions are specific and credible.
- ☐ Gross margin and markup have not been confused.

4 Customer-ready review

- ☐ Company identity, customer, address, estimate number and revision are correct.
- ☐ Items and quantities match the manual field notes.
- ☐ Taxable base and rate have been checked using local guidance.
- ☐ Deposit plus remaining balance equals the final total after rounding.
- ☐ Install, service, takedown, storage, warranty and exclusions are accurate.
- ☐ The exported PDF has been previewed for clipping and stale details.

TWINKLEBID SCOPE

TwinkleBid turns installer-entered measurements into package totals and a branded estimate. It does not measure photos, schedule crews, invoice customers or process cards.

twinklebid.openverse.tech/quote-checklist