

Quote to paid: a one-page checklist

For small drawing and survey practices.

1. The quote

- ☐ What's included, item by item: which floors, which elevations, the roof plan, any outbuilding.
- ☐ What isn't included: planning fees, the structural engineer, extra site visits, extra rounds of changes.
- ☐ The fee with the VAT shown. If your client is a homeowner, the price you give them must include VAT.
- ☐ The deposit: how much, and when it's due.
- ☐ How long the quote stays valid. Thirty days is common.
- ☐ When the drawings will arrive, in working days from the survey.

2. The yes

- ☐ Get the client's yes to the exact quote, in writing. A yes on the phone isn't a record.
- ☐ A homeowner who agreed online, by phone or email, or at their home usually has 14 days to change their mind. If they want you to start sooner, get that in writing.

3. The deposit invoice

- ☐ Your details and the client's, the next invoice number, and the date.
- ☐ What it's for: the job, the address and the quote it comes from.
- ☐ The deposit, and if you're VAT-registered, the VAT on it and the total.
- ☐ The full fee, and what will be left to pay at the end.
- ☐ When it's due, how to pay, and the reference to use.
- ☐ Send it the day they say yes.

4. Before it goes out

- ☐ Someone other than the person who drew it checks it.

5. The final invoice and the receipt

- ☐ The agreed total, less what's been paid. Show the deposit on it.
- ☐ Any extra work agreed along the way, on its own line.
- ☐ Check the quote, the deposit invoice, the final invoice and the receipt all add up.
- ☐ Send the receipt when the money arrives.

6. If it isn't paid

- ☐ Say on the invoice when payment is due.
- ☐ Decide before you send it when you'll send a reminder.
- ☐ If your client is a business, the law lets you charge interest and a fixed sum of £40, £70 or £100, depending on the size of the debt. This doesn't apply to homeowners.