

Contractor Estimate Sheet: how to use it

1. Replace every [bracketed placeholder] with your own business details. Add your logo with Insert > Picture.
2. Yellow cells are inputs. White/grey cells calculate automatically. Do not type over formula cells.
3. Estimate tab: enter Qty and Unit Cost per line. Line totals, section subtotals, markup, contingency, tax and the grand total calculate for you.
4. Set your Markup %, Contingency % and Sales Tax % in the totals block, and choose whether tax applies to materials only, the full price, or none.
5. Optional add-ons: list extras the client can choose. They are shown separately and NOT added to the grand total unless you move them into the estimate.
6. Payment schedule: enter the % for each payment. The amounts calculate from the grand total, and the check cell turns red if the total is not 100%.
7. Print or File > Save As / Export to PDF to send it. For each new job, duplicate the tab (right-click > Move or Copy) or save a copy of the file.
8. Works in Microsoft Excel and Google Sheets (File > Import). No macros.

Tax note: sales tax rules for construction labor and materials differ by state. Check your state rules or ask your accountant.

Need change orders too? The full Change Order + Estimate Kit adds a matching change order tab (revised contract total, schedule impact, signatures) and a fillable change order PDF. Find it in the EZcontractordocs shop.

Made by a working carpentry and remodeling contractor. | EZcontractordocs

Template only, not legal or tax advice. Have it reviewed by a local attorney for your state before use.

[Your Company Name]

[Street Address], [City, State ZIP]

[Phone] | [Email] | [Website]

[License / Registration No., if applicable] | [Logo: Insert > Picture]

ESTIMATE / BID

Estimate #

Date

Valid for (days)

Valid until

EST-0001

30

CLIENT & JOB INFORMATION

Client name	Prepared by
Client phone / email	Project name
Job address	Estimated start date
Billing address (if different)	Estimated duration

LABOR				
Description	Qty	Unit	Unit Cost	Line Total
[Description]		hr		\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
Labor Subtotal				\$0.00

MATERIALS				
Description	Qty	Unit	Unit Cost	Line Total
[Description]		ea		\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
Materials Subtotal				\$0.00

SUBCONTRACTORS				
Description	Qty	Unit	Unit Cost	Line Total
[Description]		ls		\$0.00
				\$0.00
				\$0.00
				\$0.00
Subcontractors Subtotal				\$0.00

PERMITS & FEES				
Description	Qty	Unit	Unit Cost	Line Total
[Description]		ls		\$0.00
				\$0.00
Permits & Fees Subtotal				\$0.00

DUMPSTER / DISPOSAL				
Description	Qty	Unit	Unit Cost	Line Total
[Description]		ea		\$0.00
				\$0.00
Dumpster / Disposal Subtotal				\$0.00

ESTIMATE TOTALS				
Labor				\$0.00
Materials				\$0.00
Subcontractors				\$0.00
Permits & Fees				\$0.00
Dumpster / Disposal				\$0.00
Direct Cost Subtotal				\$0.00
Markup % (overhead & profit)	15.00%			\$0.00
Contingency % (of direct cost)	5.00%			\$0.00
Pre-Tax Total				\$0.00
Sales tax applies to (choose)	Materials only			
Sales Tax %	0.00%			\$0.00
GRAND TOTAL				\$0.00

OPTIONAL ADD-ONS (not included in the grand total)				
Option	Qty	Unit	Unit Price	Option Total
[Optional upgrade or add-on]				\$0.00
				\$0.00
				\$0.00
Options total				\$0.00

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PAYMENT SCHEDULE				
Payment			% of total	Amount
Deposit at signing				
Progress payment: [milestone]				
Progress payment: [milestone]				
Final payment on completion				
Total (should be 100%)			0.00%	\$0.00

Deposit and payment rules vary by state. Check your state's home improvement rules.

SCOPE OF WORK / NOTES
[Describe the work included in this estimate, room by room or phase by phase.]

EXCLUSIONS
[List what is NOT included, e.g. painting, electrical beyond rough-in, hidden-condition repairs, appliance install.]

TERMS & VALIDITY
[Payment schedule, e.g. deposit / progress / final.] This estimate is valid for the number of days shown above. Prices for materials may change after that date. Changes to scope will be handled by written change order.

ACCEPTANCE

By signing, the client accepts this estimate, including the scope, exclusions and terms above.

Contractor signature: _____ Date: _____

Printed name / title: _____

Client signature: _____ Date: _____

Printed name / title: _____

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