



RESIDENTIAL WINDOW FILM QUOTE CHECKLIST

JOB _____
CUSTOMER _____

ESTIMATOR _____
PROPERTY _____

DATE _____
REVISION _____

ESTIMATE STATUS ☐ Firm ☐ Preliminary ☐ Budgetary ☐ Revision

1 INITIAL REQUEST

- ☐ Customer, property, contact information, and approval role are correct.
- ☐ Property is inside the service area or approved as an exception.
- ☐ Rooms, windows, and the customer's main goal are recorded.
- ☐ Timing, occupancy, decision makers, and budget status are understood.
- ☐ Initial photos or other qualification details are attached when used.

2 RESIDENTIAL SITE AND ACCESS

- ☐ Interior and exterior access conditions are recorded.
- ☐ Furniture, flooring, walls, landscaping, pets, occupants, and valuables are addressed.
- ☐ Screens, blinds, shades, window treatments, and obstructions are documented.
- ☐ Ladders, lifts, scaffolding, exterior work, parking, gates, and travel are covered.
- ☐ Existing film, damage, failed seals, frame condition, and other visible concerns are documented.

3 MEASURED SCOPE

- ☐ Every included room, elevation, and pane has a clear name.
- ☐ Width, height, quantity, area, units, and measurement basis are consistent.
- ☐ Included, excluded, optional, and alternate areas cannot be confused.
- ☐ High, large, divided, curved, shaped, or unusual windows are identified.
- ☐ Photos, measurements, proposed film, and room names match.

4 GLASS, FILM, AND APPEARANCE

- ☐ Glazing construction, coatings, condition, exposure, and shading are recorded.
- ☐ Manufacturer, film line, product, shade, and installation surface are identified.
- ☐ Current manufacturer film-to-glass guidance has been checked.
- ☐ Required manufacturer or qualified technical review is complete.
- ☐ Warranty eligibility and required documentation are confirmed.
- ☐ Inside and outside appearance expectations are discussed.
- ☐ Daytime and nighttime privacy expectations are stated accurately.

5 MATERIAL PLAN

- ☐ Each film has its own measured window list and material plan.
- ☐ Available roll widths, costs, order lengths, freight, and lead time are known.
- ☐ Every pane fits the proposed roll and orientation.
- ☐ Viable roll widths have been compared when the choice affects the purchase.
- ☐ Linear feet, cut-layout waste, and Visual Cut Diagram are reviewed.
- ☐ Film used and film purchased are treated as separate numbers.
- ☐ Film on hand is considered without treating existing inventory as free.



6 LABOR, PROTECTION, AND ACCESS

- ☐ Crew size and expected hours match the property and pane count.
- ☐ Setup, protection, moving items, obstruction handling, cleanup, and closeout are included.
- ☐ Customer preparation and installer responsibilities are clearly separated.
- ☐ Removal, ladders, lifts, scaffolding, exterior work, and large windows are covered.
- ☐ Occupied rooms, pets, children, restricted periods, and coordination are reflected in labor.
- ☐ Travel, parking, separate mobilizations, and return visits are included.

7 REMOVAL AND ADDED COSTS

- ☐ Existing film or other material to be removed is identified by area.
- ☐ Removal, preparation, protection, disposal, and cleanup are included or excluded.
- ☐ A representative removal test was completed when practical.
- ☐ Uncertain removal conditions use an allowance or other stated pricing method.
- ☐ Freight, access equipment, specialty systems, permits, outside work, and other project costs are covered.

8 SELLING PRICE AND OPTIONS

- ☐ Material price comes from the current purchase or inventory plan.
- ☐ Labor reflects crew, hours, removal, protection, access, and schedule.
- ☐ Direct job costs, company overhead, and required return are covered.
- ☐ Base scope, alternates, upgrades, and optional rooms are easy to distinguish.
- ☐ Discounts do not remove required cost coverage.
- ☐ Tax treatment and effective price per square foot are reviewed.
- ☐ Reliable completed-job history is considered where available.

9 CUSTOMER ESTIMATE

- ☐ Customer, property, included rooms, panes, and proposed films are correct.
- ☐ The requested result and important appearance or privacy limitations are stated.
- ☐ Removal, access, attachment, specialty work, and exclusions are defined.
- ☐ Customer preparation, pets, furniture, and site responsibilities are stated.
- ☐ Assumptions, conditions, and technical-review status are specific to this job.
- ☐ Schedule, phases, material availability, and warranty details are accurate.
- ☐ Expiration, payment, deposit, tax, and cancellation terms are current.

10 FINAL CROSS-CHECK

- ☐ Every measured area is quoted, optional, or intentionally excluded.
- ☐ Every proposed film appears in the current material plan.
- ☐ Technical-review status is current for each proposed film and glazing condition.
- ☐ Quantities, area, material, labor, charges, taxes, discounts, and total match.
- ☐ Each special condition has a cost, assumption, exclusion, or responsible party.
- ☐ Photos and notes contain no unaddressed condition.
- ☐ Another person can understand what is being offered and why.

AFTER ACCEPTANCE

- ☐ Accepted scope, revision, selections, and declined alternates are recorded.
- ☐ Required approvals, deposit, and material purchase are complete.
- ☐ Material availability is reconfirmed before ordering or scheduling.
- ☐ Customer preparation and installation date are confirmed.
- ☐ Later changes are documented, reviewed, and repriced when needed.