START HERE

Read this page first · it tells you where your files are and which one to open.

Where your files live

- Your files live in your Etsy account. Go to Etsy · Purchases · Download Files.
- Nothing ships. Your download is ready the moment your payment clears.
- Save a backup copy to your phone, computer, or cloud drive.

How to open everything

- PDFs open in any free PDF reader (phone, tablet, or computer).
- If your download arrives as a .zip, tap or double-click it to unzip, then open the files inside.
- The spreadsheet (.xlsx) opens in Excel or Google Sheets (free).

Which file is for what

- Flat US Letter PDF · print at home or at a copy shop.
- Flat A4 PDF · for A4 printers.
- Ink-friendly B&W US Letter PDF · saves ink, photocopies cleanly.
- Fillable PDF · tap-type on your phone, no printing required.
- Spreadsheet (.xlsx) · working formulas with demo data you can replace.

Your bonus file

A free A4 ink-friendly black-and-white version is linked in your Etsy thank-you message after purchase. The link is also the fastest way to re-download if you switch devices.

Stuck? Talk to a human

Message us here on Etsy and we will help you get it open. Tell us your device (phone, tablet, computer) and what you see on screen · that gets you a fix fastest.

The Moment This Solves

You drove 40 minutes, diagnosed the leak, quoted the fix · and the customer balks: 'Nobody said anything about a trip charge.' This kit authorizes the trip charge and minimum fee in writing BEFORE you roll, and again at the door before tools come out.

How this kit works

- Step 1: on the booking call, state your trip charge and minimum fee in your own figures and log the call on page 3 · what was quoted, word for word.
- Step 2: at the door, walk page 4 with the customer · what the fee covers, when it is waived or credited (your terms), and what happens if they decline the work.
- Step 3: get the authorization signed BEFORE the toolbox opens · page 6 · so the fee is agreed, not argued at invoice time.
- Step 4: if the fee is disputed later, answer from the dispute record on page 7: the call log, the door slip, the signature.
- This kit records YOUR fees on YOUR terms. It states no pricing law, fee rule, or consumer standard as applying · your numbers, stated twice, signed once.

Job at a glance

Customer name:

Property address:

Job asked for (customer's words):

Booking date / call time:

Arrival window given:

This kit is a general documentation tool for handyman businesses. It is not legal advice · consult an attorney about your fee terms and consumer obligations.

Booking Call Log · As Quoted

What was actually quoted on the call, recorded the same day · this page is the booking's memory.

Item quoted	Figure / words used	Notes

- Record: the trip charge figure, the minimum-fee figure, how each was described ('applies if you decline' / 'credited toward the job' · your terms, in the words you used), the arrival window, and anything the customer asked about price.
- If the booking came by text or message, note where that thread lives (app / phone) so the quote can be found again.

Trip charge quoted (your figure):

Minimum fee quoted (your figure):

How the customer responded on the call:

What the Fee Covers · Plain-Words Page

Read this page WITH the customer at the door. A trip charge is not a surprise fee · it is the cost of the truck, the time, and the diagnosis, said out loud twice.

- ☐ The trip itself: fuel, drive time, and the slot held for this address · spent whether the job proceeds or not, which is why the fee exists.
- ☐ The diagnosis: the trip fee buys a real look and a real number · what is wrong, what the fix takes, and the price to do it, in writing on the quote.
- ☐ Your credit rule, in your words: whether the trip charge is credited toward the job if the customer proceeds · written on this page exactly as you state it, no other version exists.
- ☐ The minimum fee: small jobs carry a floor because setup, travel, and clean-up are the same for a 10-minute fix as a 2-hour one · the figure was quoted on the call and is repeated here.
- ☐ Declining is allowed: the customer may decline the work after diagnosis · the trip charge agreed here is what is owed for the visit, and that sentence is the reason for this signature.

Plain words, quoted twice, beat a verbal 'there's also a fee.' Add your own lines below · your service area, your after-hours figures, your credit rule examples.

My credit rule for this job (credited / not credited / partial):

My own notes for this visit (access, parking, gate codes source):

Door Checklist · Walked Together

Go line by line at the door, before tools come out. Initial each line · initials mean 'we talked about this one'.

- ☐ Figures match: the trip charge and minimum fee at the door are the same figures logged from the booking call · any difference is explained and written here.
- ☐ Coverage explained: what the fee covers (trip + diagnosis + written quote) was walked through in plain words.
- ☐ Credit rule stated: whether the fee is credited toward approved work, in the words written on page 4.
- ☐ Decline outcome stated: if the customer declines the fix, what is owed for the visit is agreed before the diagnosis starts.
- ☐ Scope honesty: the customer knows diagnosis covers the reported problem; new problems found get quoted, not silently added.

Questions the customer asked, and the answers given:

Anything the customer asked us to note as especially important to them:

Customer Authorization · Signed Before Tools Open

One signature that says: the fee was quoted on the call, repeated at my door, and I agree to it. Read it aloud before they sign.

I confirm that the trip charge and minimum fee written in this kit were quoted to me when I booked and explained again at my door, including what the fee covers and how it is credited if I proceed with the work. I authorize the visit and diagnosis on those terms.

Customer signature: _____ Date / time: _____
Handyman signature: _____ Date / time: _____

- ☐ The customer signed before diagnosis began · not at invoice time, not from memory.
- ☐ The customer received a copy or a clear photo of every signed page.
- ☐ Anything the customer disagreed with is written on this page in their words.

Diagnosis & Quote Note · The Written Number

The trip fee bought a real number. This page is that number, in writing, so the decision · yes, no, or later · is made against paper.

What I found (plain words):

Fix quoted (parts + labor, your figure):

Trip charge credit applied (per page 4 rule):

Total if they proceed today:

Quote valid until (your date):

These blanks are deliberately empty: the quote is yours to stand behind. A customer who declines against a written number rarely disputes the visit fee · the number is the receipt for what the fee bought.

Fee-Dispute Record · Answer From the File

If 'nobody told me' arrives later, this page turns it into a read-back: call log, door slip, signature. Complete it on the call, calmly.

Date	What was said (their words)	Shown from file

Figure quoted on the booking call, and its date:

Authorization signature date / time:

Resolution or next step, and its date:

- ☐ The call log and signed door slip were the basis of the answer · not a re-argument about the fee.
- ☐ Any waiver or goodwill step is written above with its date · never left verbal.

Completion & Payment Sign-off

Close the visit with the work and the money agreed on the same paper that authorized the trip.

I confirm the work described here was completed or the visit concluded as noted, and that the amounts below match the authorization and quote pages in this kit.

Customer signature: _____ Date / time: _____
Handyman signature: _____ Date / time: _____

- ☐ Work done (or diagnosis-only, if declined) is circled and matches the quote note.
- ☐ Trip charge treatment (charged / credited) matches the rule signed on page 6.
- ☐ Payment method and amount received are written in the job log spreadsheet tonight.

Closeout & Job File Checklist

File it complete tonight, while the visit is still one story.

Closeout checklist

- [ ] Call log, plain-words page, door checklist, signed authorization, quote note, and completion sign-off are filed together under the customer address.
- [ ] Before/after photos of the diagnosed problem are saved with the job file · not loose phone photos.
- [ ] The spreadsheet job log is updated: visit date, fee quoted, authorization signed, outcome.

Questions to ask a professional

- Ask an attorney: do my fee terms and this slip sit correctly alongside my invoices?
- Ask your insurer: what visit documentation do you want when a fee dispute arrives?
- Ask a veteran handyman you trust: which fee sentence do customers most often claim they never heard?

This kit is a general documentation tool you complete from your own quoted figures and terms. It is not legal advice · consult an attorney about your situation. It states no pricing law, fee rule, or consumer standard as applying.