

HOW TO ANALYZE A BID

Whether you're analyzing a bid from one installer or comparing several options, a few simple tips can help you know what to look for in a ductless heat pump bid. Use this guide to make sure the bid or estimate matches up with what the installer has told you during your conversations and assessments.



Some utilities allow participating installers to pass along incentives directly to customers as an instant rebate, which will show up as a line item on your bid. Ask if utility incentives are included in the bid, or if you will need to apply for them separately. If applied for separately, ask if the installer can assist you in completing the paperwork correctly.


COMMON ITEMS ON THE BID TO REVIEW:

Look for contractor contact info, including phone and/or email.

Look for the sales person's name.

Ask for a line-item bid that lists each component cost individually.

Read the fine print. Notes and special clauses could alter price.



Bid

Dan's Awesome DHPs
We install, you enjoy!

Tacoma, WA
 253.123.4567
 DADHP@email.com

TO Homeowner
 Tacoma, WA
 253.987.6543
 Customer ID No. 1234

INVOICE # 475

DATE: 1.1.19

Exp: 4.1.19

| QTY | DESCRIPTION | UNIT PRICE | LINE TOTAL |
|----------------|---|------------|------------|
| 1 | 18k Outdoor compressor, model MVP 123456789 | 1,600.00 | 1,600 |
| 1 | 18k Indoor head, model MVPind 987654321 | 1,300.00 | 1,300 |
| 18 | Linear feet lineset cover | 25.33 | 456 |
| | New breaker, wiring, electrical labor | 250.00 | 250 |
| | Pad and 6-inch risers | 150.00 | 150 |
| | Shutoff switch | 98.00 | 98 |
| | Minor trim carpentry | 75.00 | 75 |
| | Permits/fees | 100.00 | 100 |
| SUBTOTAL | | | 4,029 |
| SALES TAX | | | 6.5% |
| SUBTOTAL | | | 4,290.89 |
| UTILITY REBATE | | | -350.00 |
| TOTAL | | | 3,940.89 |

Quotation prepared by: *Jane Estimator*

This is a quotation on the goods named, subject to the conditions noted below: Describe any conditions pertaining to these prices and any additional terms of the agreement. You may want to include contingencies that will affect the quotation.

To accept this quotation, sign here and return:

THANK YOU FOR YOUR BUSINESS!

Make sure the invoice or bid number is printed out for reference.

Ask how long the bid is valid for.

Make sure financing and payment terms are clear and understandable.

Ask clarifying questions about permits, taxes and rebates.



ADDITIONAL QUESTIONS TO ASK YOUR INSTALLER

- Does the bid include all of the items we discussed in person, on the phone and via email?
- Can I receive answers in writing to all questions (in the bid/estimate, emails, assessment report)?
- What should I expect during the installation?
 - What noise, time, and disruption should I prepare for?
 - Will I need to do any finish painting, trim work, or cleanup?
- Can you explain the system specifications to me?
 - Size of system (installed systems are typically between 9,000–24,000Btus)
 - Accessories or special features such as a surge protector, wall thermostat or WiFi capability
 - System efficiency and extended temperature capacity (e.g., HSPF, cold climate capability)
 - Any parts or labor warranties
- What's it like living with the ductless heat pump?
 - What will the system sound like when it is running?
 - Where will the condensate go?
 - What are my controls options?
 - What kind of maintenance and upkeep will my new system require?

