210: Understand how to communicate with others within building services engineering  
**Handout 6: Customer information**

**Learning outcome**

The learner will:

1. know how to apply information sources in the building services industry.

**Assessment criteria**

The learner can:

2.3 identify the purpose of information given to customers:

* quotations
* estimates
* invoices/statements
* statutory cancellation rights
* handover information.

**Customer information**

A number of pieces of information need to be given to the customer and can be summarised as follows.

**Quotation**

A quote allows a prospective customer to see what costs are going to be involved for the work they would like to have done and is generally fixed, ie the quotation forms the main component of the contract.

A quote can help the prospective buyer when deciding which company to use and which services they are looking for.

**Estimate**

Many businesses provide services that cannot have an upfront price, as the costs involved can vary. This can be due to the materials that might be used (which can differ depending on the individual needs of the customer) and the manpower that might be necessary.

Therefore, it is common practice for these companies to provide the potential customer with an estimate of how much it should cost. This estimate will be made by the company using the information that the potential customer provides, regarding the relevant elements that may affect the price.

An estimate may vary and is flexible.

**Invoice**

An invoice or **bill** is a commercial document issued by a seller to the buyer, indicating the products, quantities and agreed prices for products or services that the seller has provided for the buyer.

An invoice indicates the sale transaction only. Payment terms are independent of the invoice and are negotiated by the buyer and the seller.

Payment terms are usually included on the invoice. The buyer can also have a maximum number of days in which to pay for these goods and is sometimes offered a discount for paying before the due date.

The buyer could have already paid for the products or services listed on the invoice.

**Statements**

A statement is a summary of financial transactions that have occurred over a given period of time between the company and suppliers or customers.

**Statutory rights to cancel**

Legislation allows a customer the right to cancel, providing that work has not started and is within a set timeframe.

**Handover information**

At the end of a contract, the customer/client **must** be given certain information. In large contracts this includes a Health and Safety file. Customers must be shown around the installation and shown how to use/set items. Other items handed to them are:

* schedule of inspections and testing
* electrical installation or minor works certificate
* manufacturers’ instructions
* warranty
* contact numbers.