[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Sales Quotation Template

Quoting a price to a customer in writing: itemised lines, totals, validity, delivery timescale, and acceptance.

Document	Sales Quotation Template
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

Quotation header

Field	Entry
From	[Company name]
To	[Client company]
Quote reference	[Quote reference]
Quote date	[Quote date]
Valid until	[Quote valid until]
Delivery timescale	[Delivery timescale]

Quoted items

Item	Description	Quantity	Unit price	Line total

Quotation totals

	Amount
Subtotal	
Discount applied	

[Company name]

Tax	
Delivery	
Quote total	[Quote total]

Terms of quotation

Prices in this quotation hold until [Quote valid until]. Delivery is promised within [Delivery timescale] from receipt of order.

This quotation is issued under quote reference [Quote reference] and covers only the items listed above.

Client acceptance

Field	Entry
Accepted by (client name)	
Client signature and date	
Order reference	
Delivery address	

Completion checklist

	The quote reference ([Quote reference]) appears on the header and in the terms.
	The quote total ([Quote total]) equals subtotal less discount plus tax and delivery.
	The validity date ([Quote valid until]) and delivery timescale ([Delivery timescale]) are stated.