

SaaS Sales Quote Template

[YOUR COMPANY LOGO]

[Your Company Legal Name]

[Company Street Address, City, State, ZIP]

[Tax ID / EIN Number] | [Support Email / Phone]

Section 1: General Deal Information

- **Quote Number:** SQ-2026-[CRM Deal ID]
- **Issue Date:** [YYYY-MM-DD]
- **Expiration Date:** [YYYY-MM-DD] (Valid for 14 Days)
- **Billing Frequency:** [Annual Upfront / Quarterly / Monthly]
- **Payment Terms:** [Net 30 / Upon Signature]

Prepared For:

- **Client Company:** [Client Company Name]
- **Primary Contact:** [Buyer Name & Title] ([Buyer Email])
- **Procurement / Accounts Payable Contact:** [Procurement Email]

Section 2: Itemized Line Items & Calculation Formula

Calculate line item totals and the final contract value using these standard calculations:

- **Line Item Net Subtotal Formula:**

Net Subtotal = (Quantity x Unit Price) x (1 - Discount% /100)

- **Year 1 Total Formula:**

Grand Total = Σ(Net Subtotals) + Sales Tax

Line Items:

1. [Tier Name] **Core Subscription**

- **Billing Frequency:** [Annual / Monthly]
- **Quantity:** [X] Seats

- **List Price:** \$[Unit Price] per seat
- **Applied Discount:** [X]%
- **Line Net Subtotal:** \$[Calculated Net]

2. [Add-on Name] (e.g., SSO & Custom Security)

- **Billing Frequency:** [Annual / Monthly]
- **Quantity:** [X] Modules
- **List Price:** \$[Unit Price] per module
- **Applied Discount:** [X]%
- **Line Net Subtotal:** \$[Calculated Net]

3. Professional Onboarding & Services

- **Billing Frequency:** One-Time Fee
- **Quantity:** 1 Package
- **List Price:** \$[Unit Price]
- **Applied Discount:** [X]%
- **Line Net Subtotal:** \$[Calculated Net]

Section 3: Pricing Summary

- **Gross Subtotal (Before Discounts):** \$[Gross Total]
- **Total Discount Amount:** - \$[Total Savings]
- **Net Subtotal:** \$[Net Total]
- **Estimated Sales & Use Tax:** \$[Calculated Tax] (*Applied per local jurisdiction*)
- **Grand Total (Year 1 Contract Value):** \$[Grand Total]

Section 4: Scaling & Usage Schedule (Optional)

- **Year 1 Commitment:** Up to [X] active user seats at \$[Unit Rate] / seat / month.
- **Year 2 Expansion Ramp:** Expands to [Y] seats starting on [Date] at \$[Unit Rate] / seat / month.
- **Usage Overage Rate:** Excess API calls or uncommitted capacity billed quarterly at \$[Overage Rate] per unit.

Section 5: Key Terms & Legal Conditions

- **Auto-Renewal:** This contract automatically renews for 12-month terms unless written notice of non-renewal is provided at least **30 days** prior to term end.
- **Sales & Use Tax:** Taxes are assessed based on the delivery location under local state and municipal tax rules. Tax-exempt buyers must supply a valid **Exemption Certificate** prior to invoice generation.
- **Invoicing & POs:** If a Purchase Order (PO) is required by your organization, supply the PO number upon signature or within 3 business days.
- **Service Start Date:** Software provision commences on [Go-Live Date]. Revenue recognition follows ASC 606 standards matching the service start date.

Section 6: Signatures & Deal Acceptance

By signing below, the customer accepts the pricing, scope, and terms detailed in this document.

- **For** [Client Company Name]
 - **Signature:** _____
 - **Printed Name:** [Name]
 - **Title:** [Title]
 - **Date:** [YYYY-MM-DD]
 - **PO Number (if applicable):** [PO Number]
- **For** [Your Company Legal Name]
 - **Signature:** _____
 - **Printed Name:** [Name]
 - **Title:** [Title / Deal Desk Manager / CFO]
 - **Date:** [YYYY-MM-DD]

Internal Approval Checklist (Remove Before Sending)

- ☐ AE confirmed seat counts and technical add-ons with the Sales Engineer.
- ☐ Disqualify the lead immediately if their implementation timeline depends on features missing from your current product roadmap.

- ☐ Accounts Payable / Procurement contact details verified.
- ☐ Quote converted to PDF or populated into electronic signature platform (DocuSign, PandaDoc, etc.).

