Klarstig

# Insurance Service Quote

Prepare a quote for a defined scope of work. Record the deliverables, pricing basis, exclusions and acceptance conditions before sending the quote to the customer.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Supplier or service provider ***

**Customer or recipient ***

**Included work and deliverables ***

**Number of quoted units ***

**Unit description ***

**Price per unit ***

**Additional quoted charges**

**Currency ***

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ CAD
- ☐ Other

**Other currency code if selected**

**Quote valid until ***

**Taxes exclusions payment and delivery terms ***

## Specific details

### Service type provider and reference

Complete when relevant to this request.

**Expected scope location timing and service requirements**

## Operating context

### Policy service or case reference

Complete when relevant to this request.

**Relevant dates evidence and authorized review contact**

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- No payment is taken by default. Online payment needs a connected payment account and is configured separately.
- Some questions become required only after certain answers. The printable version shows every question.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

### Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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