

# Price Quote and Invoice Templates

## Professional Templates for Corporate Orders and Wholesale

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### Overview

These templates are designed for: - Corporate gifting quotes - Wholesale orders - Bulk orders for events - Custom projects

All templates should be created in Google Docs, branded with your logo and colours, and exported as PDF. Include your company details, payment terms, and a professional but warm tone.

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### Template 1: Standard Quote

CHOCOLAT ON JAMES

[Logo]

123 James Street South

Hamilton, ON L8P 2A1

Phone: [phone]

Email: [email]

Website: [website]

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QUOTE

TO:

[Client Name]

[Company Name]

[Address]

DATE: [Date]

QUOTE #: COJ-[Month]-[###]

VALID UNTIL: [Date 14 days out]

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DESCRIPTION OF SERVICES

[Item 1]: [Description, e.g., "50 units, Tier 2 Premium Collection, 8-piece custom assortment,  
Quantity: [#]

Unit Price: \$[amount]

Total: \$[amount]

[Item 2]: [Description, e.g., "Custom packaging with your logo"]

Quantity: 1

Unit Price: \$[amount]  
Total: \$[amount]

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SUBTOTAL: \$[amount]  
HST (13%): \$[amount]  
TOTAL: \$[amount]

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#### TERMS

- 50% deposit due upon approval. 50% due upon delivery.
- Lead time: 2-3 weeks from approval.
- Rush orders available (5-7 days) for additional \$[amount] fee.
- Delivery included for orders over \$[amount] within [radius].

#### PAYMENT METHODS

- Credit Card: [link or instructions]
- Bank Transfer: [details]
- Cheque: [details]

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#### NOTES

[Any custom details, e.g., "Includes tasting guide for your team" or "Delivery to your office"]

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#### NEXT STEPS

1. Review this quote.
2. Approve by replying to this email or calling [phone].
3. We'll send you a formal invoice and confirm timeline.
4. Production begins upon payment.

Questions? Reply or call. We're happy to adjust anything.

Thanks!

[Your Name]  
Chocolat on James

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## Template 2: Customised Quote – Corporate Tiered Gifting

CHOCOLAT ON JAMES

[Logo]

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PROPOSAL: TIERED CORPORATE GIFTING PROGRAM

CLIENT: [Company Name]

DATE: [Date]

PREPARED BY: [Your Name]

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EXECUTIVE SUMMARY

We recommend a tiered gifting approach to optimize your corporate gift program:

- **\*\*Tier A (VIP Clients):\*\*** Premium curated collection
- **\*\*Tier B (Established Clients):\*\*** Mid-level curated collection
- **\*\*Tier C (General Recipients):\*\*** Entry-level thoughtful gift

This approach maximizes impact while staying within budget.

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TIER BREAKDOWN

**\*\*TIER A: VIP COLLECTION\*\***

Description: 12-piece premium assortment, premium packaging, branded card, tasting guide

Recipients: [#] people

Unit Price: \$[amount]

Quantity: [#]

Subtotal: \$[amount]

**\*\*TIER B: ESTABLISHED COLLECTION\*\***

Description: 8-piece curated assortment, branded packaging, card

Recipients: [#] people

Unit Price: \$[amount]

Quantity: [#]

Subtotal: \$[amount]

**\*\*TIER C: APPRECIATION GIFT\*\***

Description: 4-piece single-origin selection, branded card

Recipients: [#] people

Unit Price: \$[amount]

Quantity: [#]

Subtotal: \$[amount]

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#### CUSTOMIZATION OPTIONS

- Branded boxes/cards: +\$[amount] per unit (minimum [#] units)
- Custom flavour selection: No charge (we'll curate based on preferences)
- Personalized tasting notes: +\$[amount]
- Delivery to multiple locations: +\$[amount] per location

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#### TOTALS

Subtotal: \$[amount]

Customization (if selected): \$[amount]

HST (13%): \$[amount]

GRAND TOTAL: \$[amount]

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#### TIMELINE

Approval: [date]

Production: [date] - [date]

Delivery: [date]

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#### WHY THIS APPROACH WORKS

Respects relationships (VIPs get premium treatment)

Budget-conscious (entry-level gifts are affordable)

Memorable (every tier is artisanal, not generic)

Values-aligned (supports local, ethical sourcing)

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#### NEXT STEPS

1. Review and approve this proposal.
2. We'll send a formal invoice.
3. Payment and timeline confirmed.
4. Production begins.

Any questions or adjustments? Let's talk.

[Your Name]  
Chocolat on James

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### Template 3: Invoice – Order Confirmation

#### INVOICE

CHOCOLAT ON JAMES  
123 James Street South  
Hamilton, ON L8P 2A1  
Phone: [phone]  
Email: [email]  
Tax ID: [number]

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BILL TO:  
[Client Name]  
[Company Name]  
[Address]  
[Phone/Email]

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INVOICE #: COJ-2025-[###]  
DATE: [Date]  
DUE DATE: [Date - typically 30 days from invoice]  
ORDER #: [Reference to original quote]

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#### DESCRIPTION

[Item 1: Description, quantity, unit price, total]  
[Item 2: Description, quantity, unit price, total]  
[Customization: Description, amount]

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SUBTOTAL: \$[amount]  
HST (13%): \$[amount]  
TOTAL DUE: \$[amount]

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#### PAYMENT DETAILS

Amount Due: \$[amount]

Due Date: [Date]

Payment Method:

- Credit Card: [link]
- Bank Transfer: [account details]
- Cheque: [mailing address]

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#### DELIVERY

Estimated Delivery: [Date/Week]

Location: [Address] or [Shipping details]

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#### TERMS

- Payment due by [date].
- Late payment subject to [interest rate]% per month.
- All items non-refundable unless defective.
- Custom orders cannot be cancelled after [date].

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#### NOTES

[Any special instructions, e.g., "Deliver to main reception on [date]" or "Include branded cards"]

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Thank you for your business. If you have any questions about this invoice, please contact us at [phone number].

[Your Name]

Chocolat on James

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### Template 4: Proforma Invoice (Pre-Production)

#### PRO FORMA INVOICE

[Use this for quotes that don't require formal payment yet, but outline the financial structure]

CHOCOLAT ON JAMES

[Logo]

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PROFORMA INVOICE #: COJ-PFI-[###]

DATE: [Date]

TO: [Client Name]

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#### DESCRIPTION OF ORDER

[Item 1: Description, qty, unit price, total]

[Item 2: Description, qty, unit price, total]

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SUBTOTAL: \$[amount]

HST (13%): \$[amount]

TOTAL: \$[amount]

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#### PAYMENT TERMS

50% deposit upon approval

50% upon delivery or [specific date]

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#### TIMELINE

Approval: [date]

Production: [date] - [date]

Delivery: [date]

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#### NOTES

[Any relevant details]

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This proforma is valid for [14 days] and is provided for reference only. Final invoice will be

[Your Name]

Chocolat on James

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## Template 5: Recurring Order Invoice – Seasonal/Annual

RECURRING ORDER INVOICE

CHOCOLAT ON JAMES

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CLIENT: [Company Name]

INVOICE #: COJ-2025-[###]

DATE: [Date]

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STANDARD ANNUAL ORDER

As discussed, here's your annual corporate gifting order:

Description: [e.g., "50-unit Holiday Collection, Tier 2 Premium, branded packaging"]

Quantity: [#]

Unit Price: \$[amount]

Total: \$[amount]

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CUSTOMIZATION FROM LAST YEAR

[If anything has changed: "Updated to include 10 additional units" or "New flavor selection added"]

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SUBTOTAL: \$[amount]

HST (13%): \$[amount]

TOTAL: \$[amount]

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TIMELINE

Delivery: [Date - typically 2-3 weeks before your deadline]

Delivery Location: [Address]

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THANK YOU



We appreciate your repeat business. This order maintains the same quality and attention as always.

[Your Name]  
Chocolat on James

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## Template 6: Invoice – Wholesale or Bulk Order

### WHOLESALE INVOICE

CHOCOLAT ON JAMES  
Bulk & Wholesale Orders

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WHOLESALE CLIENT: [Business Name]  
INVOICE #: COJ-WHOLESALE-[###]  
DATE: [Date]

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### ORDER DETAILS

[Item 1: Product name, SKU, qty, wholesale unit price, total]  
[Item 2: Product name, SKU, qty, wholesale unit price, total]

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SUBTOTAL: \$[amount]  
Wholesale Discount (if applicable): - \$[amount]  
HST: \$[amount]  
TOTAL: \$[amount]

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### WHOLESALE TERMS

- Payment due: [30/60/90 days]
- Minimum order: \$[amount]
- Reorder discount: [%] for orders over \$[amount]
- Shipping: [included/additional cost]

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### DELIVERY

Expected Shipment: [Date]

Tracking: [Will be provided separately]

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#### NOTES

[Any wholesale-specific details, e.g., "Product not for resale with our branding removed" or "I

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Questions about your wholesale account? Contact us at [email] or [phone].

[Your Name]

Chocolat on James - Wholesale

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### Template 7: Payment Reminder Email

**Subject:** Reminder: Invoice [#] Due on [Date]

Hi [Client Name],

Just a friendly reminder that invoice [#] for your order is due on [date].

#### **\*\*INVOICE DETAILS\*\***

Invoice #: [#]

Amount Due: \$[amount]

Due Date: [date]

#### **\*\*PAYMENT OPTIONS\*\***

- Credit Card: [link]
- Bank Transfer: [details]
- Cheque: [details]

If you've already paid, thank you! Please disregard this message.

If you have any questions or need an extension, just let me know.

[Your Name]

Chocolat on James

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### Template 8: Payment Received Confirmation

**Subject:** Payment Received – Order [#] Confirmed

Hi [Client Name],

Thank you! We've received your payment for invoice [#].

**\*\*PAYMENT DETAILS\*\***

Amount: \$[amount]

Date Received: [Date]

Method: [Credit card/Bank transfer/Cheque]

**\*\*ORDER STATUS\*\***

Your order is now in production.

Estimated Delivery: [Date/Week]

Delivery Location: [Address]

We'll send you a confirmation with tracking info once it ships.

If you have any questions before delivery, just reply to this email.

Thanks for your business!

[Your Name]

Chocolat on James

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## Branding Notes for All Templates

- **Header:** Include your logo, business name, address, phone, email, website.
- **Fonts:** Use professional sans-serif (e.g., Helvetica, Calibri, Open Sans).
- **Colours:** Incorporate your brand colours subtly (borders, headings).
- **Signature:** Always end with your name, title, and contact info.
- **White space:** Don't overcrowd. Professional documents are easy to scan.

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## Implementation Steps

1. Create each template in Google Docs with your branding applied.
2. Export as PDF to use as a standard reference.
3. For each new quote/invoice, either:
  - a. Make a copy of the template in Google Docs and edit, or
  - b. Use a system like HoneyBook, Wave, or Zoho Invoice that pulls from templates.
4. Always include payment terms, timeline, and contact info.
5. Store copies in a organized folder for reference and accounting.

## Key Reminders

- **Accuracy:** Double-check all numbers before sending.
- **Branding:** Maintain consistent formatting across all documents.
- **Timeline:** Be realistic about delivery dates and build in buffer time.
- **Payment Terms:** Be clear about deposit/payment structure. Ambiguity creates friction.
- **Follow-Up:** Send friendly reminders before deadlines. Don't assume people saw the invoice.

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**Template Status:** Ready to use. Customize with your company details and deploy.

**Next Phase:** Track which clients/order types are most profitable. Adjust pricing and terms based on data.