

A Quote Template and the Email That Sends It, Set Up in Gmail and Google Docs in Under an Hour

Build one master quote in Google Docs, then save a Gmail template that puts the total, deposit, expiry date and a reply-yes instruction in the email body itself. The PDF is the backup, not the message.

WHAT THIS ADDS

Most quote templates online are only the document, but the customer often decides from the email preview on their phone without opening the attachment. So the email body should carry the total, deposit, expiry and a one-word way to accept. And because Gmail templates do not fill in names, a ten-second search for leftover brackets is the real safeguard against sending one customer another customer's quote.

What you will have at the end, and what you need first

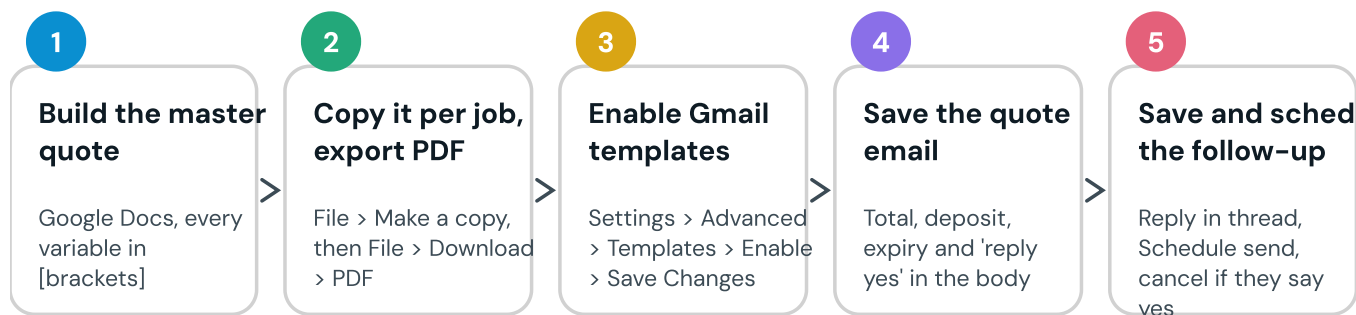
By the end you will have three things. The first is a master quote document in Google Docs that you copy for each job. The second is a saved Gmail template that sends the quote with the important numbers in the email itself. The third is a saved follow-up message you can schedule in two clicks.

After setup, sending a quote takes about five minutes: fill in a copy, download it as a PDF, insert the template, replace the brackets, attach, and send.

What you need before starting:

- A Google account, either a free Gmail address or Google Workspace. Both work for every step here.
- A computer. The Gmail phone app cannot insert templates. More on that in the troubleshooting section.
- Your usual prices, your tax rate, and your deposit rule, for example 30% to book a date.
- Your logo file, if you have one. You do not need one.

One thing this tutorial does not cover is taking the deposit itself. If you want a payment link that tells you which customer paid, that is covered in [how to set up a Stripe payment link that tells you who paid](#). You will paste that link into the follow-up once the customer says yes.



The five-step setup: done once, then about five minutes per quote

Step 1: Build the master quote once in Google Docs

Go to docs.google.com and click **Blank document**. Rename it, top left, to **QUOTE MASTER – do not edit**. The capitals are there so you never type a real customer's job into it by accident.

Put these sections down the page, in this order:

1. **Your header:** business name, phone, email, and license or registration number if your trade has one. To add a logo, use Insert > Image > Upload from computer.
2. **Quote details:** Quote # [NUMBER], Date issued [DATE], **Valid until [DATE]**.
3. **Prepared for:** [CUSTOMER NAME], [JOB ADDRESS], [PHONE/EMAIL].
4. **The job in one sentence:** [WHAT YOU WILL DO, WHERE]. For example: "Build and stain a 12 x 16 ft pressure-treated deck off the back door."
5. **Line items:** click Insert > Table and pick 4 columns by 6 rows. Label the columns Item, Qty, Unit price, and Line total. Keep the rows few and readable. Customers argue with 30-line quotes and accept 6-line ones.
6. **Totals:** Subtotal, Tax [RATE]%, **Total**, and **Deposit to book [DEPOSIT]**.
7. **Not included:** one or two lines, such as permits, haul-away, or prints beyond the package. This line prevents more disputes than anything else on the page.
8. **Payment terms:** when the deposit is due, when the balance is due, and how you take payment.
9. **How to accept:** "Reply 'yes' to the email this came with, and I'll send the deposit link and confirm your dates."

Write every variable in square brackets, like [THIS]. That convention matters in Step 4.

Set the validity window deliberately. Thirty days is the common default. If your material prices move monthly, as with lumber, paint or parts, use 14. An expiry date is not pressure. It protects you from honoring a six-month-old price.

Step 2: Fill in a copy for each job and download it as a PDF

Never edit the master. For each new quote, open the master and click **File > Make a copy**. Name the copy so you can find it later, for example **Q-1047 Rivera deck**. Tick nothing else and click **Make a copy**.

In the copy, replace every bracket. Here is a worked example. The numbers are illustrative, not a pricing guide. Dana, a deck builder, quotes the Riveras \$8,400 including tax. Her deposit rule is 30%, so the deposit line reads \$2,520. The quote is valid for 14 days.

Google Docs tables do not calculate. Do the sums on a calculator or in a spare Google Sheet, and check the total twice. A wrong total on a sent quote is the hardest mistake to walk back.

When it is done, click **File > Download > PDF Document (.pdf)**. The file lands in your Downloads folder. Rename it to something the customer will recognize in their inbox, such as **Dana-Decks-Quote-1047.pdf**, rather than leaving it as "Q-1047 Rivera deck.pdf" or "Untitled."

Why send a PDF and not a Docs link? A PDF looks the same on every phone, and it cannot be edited. A shared Doc can show your other files if you get the sharing settings wrong.

Step 3: Turn on templates in Gmail

Gmail templates are switched off by default. Turn them on like this:

1. Open Gmail on a computer.
2. Click the **gear icon** at top right, then **See all settings**.
3. Click the **Advanced** tab.
4. Find **Templates** and select **Enable**.
5. Scroll to the bottom and click **Save Changes**. Gmail reloads.

That is the whole step. If you do not see a Templates row, jump to the troubleshooting section below.

Step 4: Write the quote email and save it as a template

Click **Compose**. Leave the To field empty. Paste this into the subject line and body, then edit the fixed wording so it sounds like you:

Subject: Your quote for [JOB] – \$[TOTAL], valid until [DATE]

Hi [NAME],

Thanks for having me out on [DAY]. Here's your quote for [JOB].

Total: \$[TOTAL] including tax

Deposit to book: \$[DEPOSIT]

Valid until: [DATE]

Earliest start: [DATE]

Included: [ONE OR TWO LINES]

Not included: [ONE LINE]

The full breakdown is in the attached PDF.

To go ahead, just reply "yes" and I'll send the deposit link and lock in your dates. If you want to change anything or bring the price down, reply with what you'd change and I'll rework it.

[YOUR NAME]

[PHONE]

Look at what is in the body. The four numbers that decide the job are there, along with one way to say yes. Many people read the email preview on their phone and never tap the attachment. If your email only says "please find attached," you have hidden the price behind a download. The total in the subject

line looks bold, but people searching their inbox later find it instantly, and it filters out tire-kickers before a call.

Now save it. Click the **three dots** (More options) at the bottom right of the compose window, then **Templates > Save draft as template > Save as new template**. Name it **Quote – send** and click **Save**. Discard the draft.

To use it: click Compose, then the three dots, then **Templates**, and click **Quote – send**. The subject and body drop in. Add the customer's address, replace the brackets, attach the PDF with the paperclip icon, and send.

Gmail templates do not fill anything in for you. There is no automatic first name and no automatic total. That is why everything variable is in brackets. Before you press Send, press **Ctrl+F** (Cmd+F on a Mac) and search for [. If anything highlights inside the email, you missed a spot.

Step 5: Save a follow-up and schedule it before you forget

Most unanswered quotes are not a no. The customer got busy. A short, specific follow-up wins back a share of them, and it costs one minute if it is already written.

Compose a new email, leave the To field empty, and paste:

Hi [NAME],

Just checking the quote for [JOB] reached you. It's good until [DATE]. If the price is the sticking point, tell me. There's usually a way to trim the scope rather than lose the job.

[YOUR NAME]

Save it the same way: three dots, **Templates > Save draft as template > Save as new template**, and name it **Quote – follow-up**.

Right after you send a quote, open that sent email in your Sent folder and click **Reply**. Replying keeps the follow-up in the same thread, so the customer sees the original quote beneath it. Insert the follow-up template and replace the brackets. Then click the **small arrow next to Send** and choose **Schedule send > Pick date & time**. Three to four business days later is a reasonable gap, and well before the expiry date.

Here is the tradeoff nobody mentions: a scheduled email goes out even if the customer has already replied yes. When they reply, open the **Scheduled** folder in Gmail's left menu, open the follow-up, and click **Cancel send**. If you know you will not keep up with that, set a Google Calendar reminder instead and send the follow-up by hand.

When they do say yes, reply with your deposit link. If you do not have one yet, the [Stripe payment link guide](#) takes about 15 minutes.

If it does not work

1. There is no Templates option under the three dots

Almost always this means templates are not enabled, or you enabled them and did not click **Save Changes** at the very bottom of the Advanced tab. Go back and check.

The second cause is the device. The Gmail app on iPhone and Android does not support inserting templates. Use Gmail in a browser on a computer, or keep the template text in your phone's notes app and paste it from there.

On a company Google Workspace account, the admin can restrict some Gmail features. If the Advanced tab has no Templates row at all, ask whoever manages your Google account.

2. The customer got the wrong name, the wrong total, or last week's PDF

This is the expensive failure, and it comes from the same thing that makes templates fast. Gmail inserts the same static text every time, and your Downloads folder holds every PDF you have ever made.

Fixes that actually stick:

- Search for [before every send, as in Step 4.
- Name PDFs with the quote number and customer surname, and check the attachment name against the customer's name before you send.
- Make the PDF from a fresh **File > Make a copy** of the master, never by editing the last customer's quote. Old line items survive in edited copies.

If you send a wrong quote anyway, reply in the same thread within the hour with the corrected PDF and one line saying the earlier version had an error. Do not start a new thread. The customer needs to see both versions side by side.

When this setup stops being enough

Docs plus Gmail is free and works well for a few quotes a week. It starts to creak when you need a signed acceptance instead of a "yes" reply, want the deposit invoice generated from the quote, or lose track of which quotes are still open. At that point a quoting tool earns its fee. Fynl does quotes, contracts and invoices in one place for \$49 a month, and dedicated tools like Jobber or HoneyBook are built around specific trades. Until then, the free version above is genuinely enough.

DO THIS

Today, build one master quote in Google Docs and save two Gmail templates: the quote email with the total, deposit and expiry in the body, and a follow-up. Then make the '[' search a habit before every send.

Sources

- Google Workspace Learning Center: Create email templates in Gmail — <https://support.google.com/a/users/answer/9308990>
- Gmail Help: Schedule emails to be sent — <https://support.google.com/mail/answer/9214606>
- Google Docs Editors Help — <https://support.google.com/docs>