



PSQuote™

LICENSING GUIDE

This guide lists the features that are included in each license type.

Two types of licenses are available to support the dynamic nature of quoting services and collaboration of sales team members, services team members, and operations/finance members.

Tiered pricing and volume pricing with discounts are available.

PSQuote SaaS Terms & Conditions: <https://psquote.com/terms-and-conditions/>

FEATURE	View/Approve	Full
		
Building & Pricing Quotes		
Create PS Quote	X	✓
Edit PS Quote	X	✓
Relate PS Quote to Opportunity	View & Approve Quote (see Note)	✓
View & Approve Quotes	✓	✓
Add Offerings to Quote & Edit Quote Lines	View & Approve Quote	✓
Edit Pricing & Discounting	View & Approve Quote	✓
Create & Edit Quote Labor Hours	View Only	✓
Create & Edit Quote Materials	View Only	✓
Create & Edit Quote Schedules (LOE Schedule)	View Only	✓
Create & Edit Quote Milestones (Billing Schedule)	View Only	✓

Note: To View Opportunities or Salesforce Products, user will need Salesforce CRM (Sales Cloud) license



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FEATURE	View/Approve	Full
		
Set Quote as Primary	X	✓
Sync Quote to Opportunity	X	✓
Clone Quotes	X	✓
Add from Template to Quote	X	✓
Create & Edit Template Quotes	View Only	✓
View / Add Notes Related to Quotes and Quote Documents	✓	✓
Chatter on Quotes and Quote Documents	✓	✓
Task Quoting / WBS & Gantt		
Create & Edit Quote Tasks & Phases (WBS Quoting)	View Only	✓
Create & Edit Task Labor (Hours / Allocation % by Task)	View Only	✓
Gantt - Create & Edit Tasks, Phases and Predecessors / Lag	View Only	✓
Quote Documents		
Create & Edit Quote Documents & Quote Line Text (PSQ Doc Builder)	View & Approve Documents	✓
Generate Basic Word Doc Content	✓	✓
Generate robust SOW / Proposal Documents	Requires 3rd party doc gen tool like Conga or Docusign	Requires 3rd party doc gen tool like Conga or Docusign



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FEATURE	View/Approve	Full
View / Download Files that are attached to Quote and Quote Documents	✓	✓
Setup Data & Config by Admin / Super User		
Create & Edit Offerings	View Only	✓
Create & Edit Resource Roles & Rate Cards	View Only	✓
Create & Edit Professional Service Materials and Material Price Book	View Only	✓
Edit PSQuote Config Settings & Custom Metadata types	X	✓
Prerequisites		
Salesforce License Requirement (purchased separately)	Salesforce CRM or Salesforce Platform license	Salesforce CRM (Sales Cloud) license

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