Air4media Pilot v10 BETA | 🏢 ACME Creative Agency OWNER ▾ | ● ACME Creative Agency   👤 Laurent P Groult ▾

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Quotes

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Quote #	Title	Account	Status	Total	Items	Valid Until	Created ▾	Actions
QTE-2026-007 Vista 2026 Brand Campaign	Vista 2026 Brand Campaign	Vista Wellness Retreats	Draft	$197,100.00	0	Apr 29, 2026	26d ago	
QTE-2026-0551 SEO Package - Vista Wellness Retreats	SEO Package - Vista Wellness Retreats	Vista Wellness Retreats	Accepted	$13,359.00	0	Apr 12, 2026	26d ago	
QTE-2026-1114 Video Estimate - Elevation Music Festival	Video Estimate - Elevation Music Festival	Elevation Music Festival	Sent	$12,483.00	0	Apr 12, 2026	26d ago	
QTE-2026-0366 Consulting Engagement - Harborview Properties	Consulting Engagement - Harborview Properties	Harborview Properties	Sent	$28,360.50	0	Apr 12, 2026	26d ago	
QTE-2026-0895 Event Branding Proposal - Harborview Properties	Event Branding Proposal - Harborview Properties	Harborview Properties	Accepted	$31,098.00	0	Apr 12, 2026	26d ago	
QTE-2026-1925 Campaign Production - Vista Wellness Retreats	Campaign Production - Vista Wellness Retreats	Vista Wellness Retreats	Accepted	$31,864.50	0	Apr 12, 2026	26d ago	
QTE-2026-0139 UX/UI Quote - Riverside Convention Center	UX/UI Quote - Riverside Convention Center	Riverside Convention Center	Viewed	$11,497.50	0	Apr 12, 2026	26d ago	
QTE-2026-1987 Service Contract - Elevation Music Festival	Service Contract - Elevation Music Festival	Elevation Music Festival	Declined	$41,829.00	0	Apr 12, 2026	26d ago	
QTE-2026-1827 Identity Proposal - Golden State Catering Co.	Identity Proposal - Golden State Catering Co.	Golden State Catering Co.	Declined	$29,017.50	0	Apr 11, 2026	27d ago	
QTE-2026-1885 Social Retainer - Elevation Music Festival	Social Retainer - Elevation Music Festival	Elevation Music Festival	Viewed	$12,373.50	0	Apr 11, 2026	27d ago	
QTE-2026-0352 Social Retainer - Pacific Coast Hospitality	Social Retainer - Pacific Coast Hospitality	Pacific Coast Hospitality	Accepted	$49,165.50	0	Apr 11, 2026	27d ago	
QTE-2026-0616 Marketing Retainer - Riverside Convention Center	Marketing Retainer - Riverside Convention Center	Riverside Convention Center	Sent	$44,238.00	0	Apr 11, 2026	27d ago	
QTE-2026-1408 Marketing Retainer - Sunset Events Group	Marketing Retainer - Sunset Events Group	Sunset Events Group	Draft	$16,972.50	0	Apr 11, 2026	27d ago	
QTE-2026-0137 Photography Quote - Pacific Coast Hospitality	Photography Quote - Pacific Coast Hospitality	Pacific Coast Hospitality	Accepted	$30,550.50	0	Apr 11, 2026	27d ago	
QTE-2026-1475 Content Production Pkg - Meridian Tech Solutions	Content Production Pkg - Meridian Tech Solutions	Meridian Tech Solutions	Declined	$37,996.50	0	Apr 11, 2026	27d ago	
QTE-2026-0310 Consulting Engagement - Meridian Tech Solutions	Consulting Engagement - Meridian Tech Solutions	Meridian Tech Solutions	Sent	$2,847.00	0	Apr 10, 2026	28d ago	
QTE-2026-1612 Media Buying Proposal - Elevation Music Festival	Media Buying Proposal - Elevation Music Festival	Elevation Music Festival	Draft	$43,143.00	0	Apr 10, 2026	28d ago	
QTE-2026-1623 Campaign Production - Meridian Tech Solutions	Campaign Production - Meridian Tech Solutions	Meridian Tech Solutions	Sent	$41,391.00	0	Apr 10, 2026	28d ago	
QTE-2026-1889 Social Retainer - Luxe Brand Studios	Social Retainer - Luxe Brand Studios	Luxe Brand Studios	Declined	$13,797.00	0	Apr 10, 2026	28d ago	
QTE-2026-0379 Event Branding Proposal - Harborview Properties	Event Branding Proposal - Harborview Properties	Harborview Properties	Sent	$53,764.50	0	Apr 10, 2026	28d ago	

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Quotes

Create and send professional quotes to clients, track their status, and convert accepted quotes into invoices or contracts — all from one place.

Key Features

- **Quote List**: See all quotes with number, title, account, status, total, item count, valid date, and age at a glance
- **Stats Bar**: At-a-glance counts for Draft, Sent, and Accepted quotes — plus total accepted value
- **Status Tracking**: Follow each quote through Draft → Sent → Viewed → Accepted, Declined, Expired, or Revised
- **Line Items**: Build quotes from custom items, catalog products, or pre-built packages
- **Pricing Controls**: Per-item discounts, a quote-level discount (fixed or %), and a tax rate — tax applies only to taxable items and adjusts proportionally when a discount is added
- **Optional Items**: Mark add-ons as optional so clients can choose them at acceptance without inflating the base total
- **Payment Rules**: Define payment schedules (e.g. 50% at signing, 50% before the event) and set one as your default
- **Quote Templates**: Save any quote as a reusable template to speed up repeat work
- **Client Acceptance Wizard**: Clients select optional items, confirm event details, preview the contract, and sign digitally — all in one guided flow
- **Auto-Contract Generation**: If a contract template is assigned, the signed contract is created automatically on acceptance
- **One-Click Conversion**: Turn an accepted quote into a contract or invoice directly from the editor
- **Post-Acceptance Workflow**: Automatically trigger follow-up automations the moment a client accepts
- **Duplicate**: Copy any quote as a new draft — great for recurring work like ACME Creative Agency's seasonal campaigns
- **Filter & Search**: Filter by status or search by quote number or title

How to Use

Create a Quote

1. Click **New Quote** in the top-right corner
2. Enter a **Title** and select the **Account** — for example, "Spring Campaign" for ACME Creative Agency
3. Optionally link a **Project** and **Contact** — dropdowns auto-populate once you pick an account
4. Set a **Valid Until** date and choose a **Pricing Tier** (Retail, Pro, Wholesale, or Custom)
5. Add an intro message, closing message, payment terms, and terms & conditions as needed
6. Use **Internal Notes** for team context — never visible to the client
7. Click **Save Quote**

Add Line Items

In the right panel of the quote editor:

1. Click **Custom Item** for a freeform entry (Service, Product, Labor, or Expense)
2. Click **Product** to pick from your catalog — pricing and taxable status carry over automatically; products are grouped by type for easy browsing
3. Click **Package** to add a pre-built bundle — savings vs. individual items are shown in the picker
4. Set quantity, unit price, and an optional per-item discount on each item
5. Check **Optional** to mark items as client-selectable add-ons

Send a Quote

- Open a draft and click **Send to Client**, or use the **Send** action from the list
- An email preview with a personal message field appears before you confirm
- Status changes to **Sent**; when the client opens their link, it moves to **Viewed**

Client Acceptance

When a client clicks Accept, they go through a guided wizard:

1. Select which optional items they want included
2. Confirm event details (venue, dates, on-site contacts) if applicable
3. Preview the contract with their information merged in
4. Enter their name, email, and draw their digital signature

If a contract template is assigned, the signed contract is generated automatically on

acceptance.

After Acceptance

- Click **Convert to Contract** or **Convert to Invoice** in the editor — all line items carry over
- If a post-acceptance workflow is assigned, it triggers automatically

Manage the List

- Filter by **Status** to find quotes at any stage
- Click **Duplicate** on any row to copy a quote as a new draft
- Select multiple rows and click **Delete Selected** to bulk-remove

Tips

- Quote numbers are auto-assigned in the format `QTE-YEAR-NNNN`
- Valid dates shown in red mean the quote has passed its expiry
- A quote can only be converted once — the system prevents duplicate contracts or invoices from the same quote
- Opening Quotes from a Project or Account page pre-fills those fields automatically
- Use **Payment Rules** (button at the top of the page) to standardize deposit and installment schedules across your team