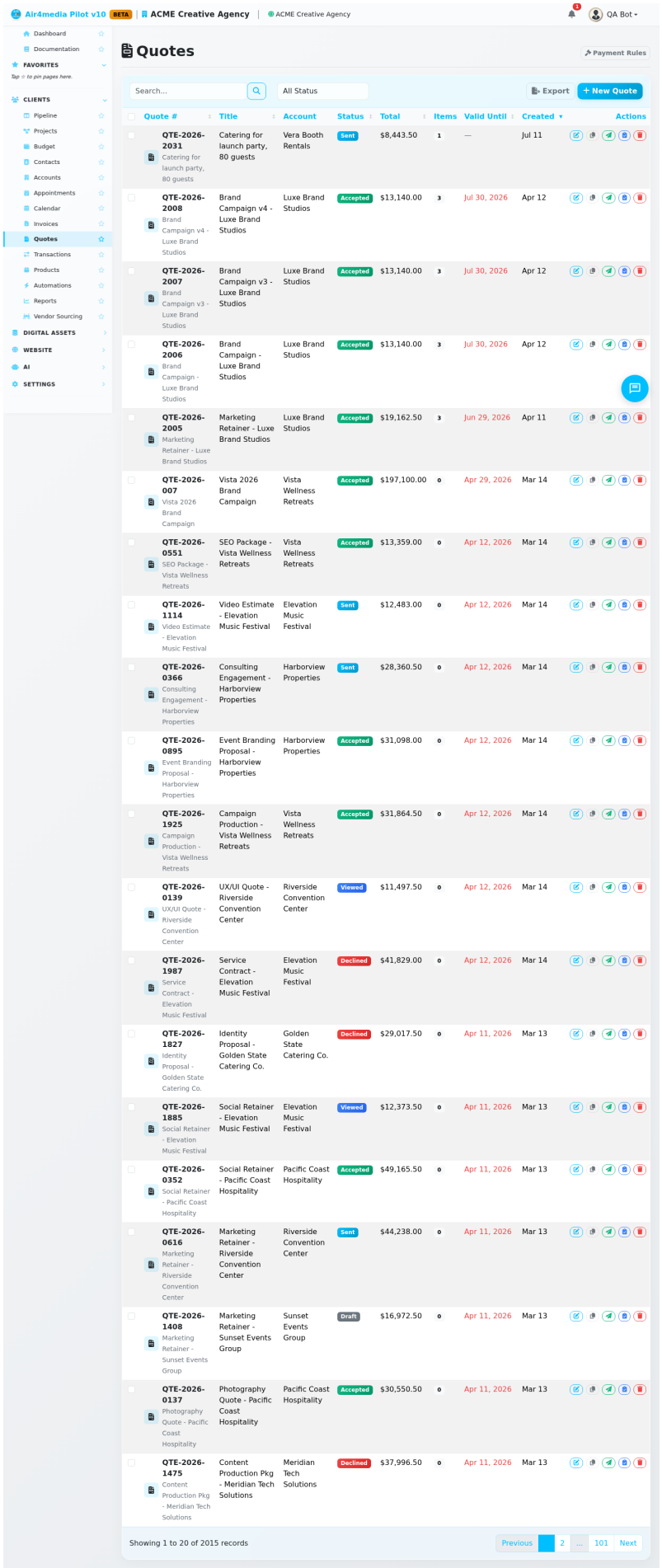
Air4media Pilot v10 BETA
ACME Creative Agency
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+ New Quote
Quote # Title Account Status Total Items Valid Until Created Actions
QTE-2026-2031 Catering for launch party, 80 guests — Catering for launch party, 80 guests — Vera Booth Rentals — Sent — $8,443.50 — 1 — — — Jul 11
QTE-2026-2008 Brand Campaign v4 - Luxe Brand Studios — Brand Campaign v4 - Luxe Brand Studios — Luxe Brand Studios — Accepted — $13,140.00 — 3 — Jul 30, 2026 — Apr 12
QTE-2026-2007 Brand Campaign v3 - Luxe Brand Studios — Brand Campaign v3 - Luxe Brand Studios — Luxe Brand Studios — Accepted — $13,140.00 — 3 — Jul 30, 2026 — Apr 12
QTE-2026-2006 Brand Campaign - Luxe Brand Studios — Brand Campaign - Luxe Brand Studios — Luxe Brand Studios — Accepted — $13,140.00 — 3 — Jul 30, 2026 — Apr 12
QTE-2026-2005 Marketing Retainer - Luxe Brand Studios — Marketing Retainer - Luxe Brand Studios — Luxe Brand Studios — Accepted — $19,162.50 — 3 — Jun 29, 2026 — Apr 11
QTE-2026-007 Vista 2026 Brand Campaign — Vista 2026 Brand Campaign — Vista Wellness Retreats — Accepted — $197,100.00 — 0 — Apr 29, 2026 — Mar 14
QTE-2026-0551 SEO Package - Vista Wellness Retreats — SEO Package - Vista Wellness Retreats — Vista Wellness Retreats — Accepted — $13,359.00 — 0 — Apr 12, 2026 — Mar 14
QTE-2026-1114 Video Estimate - Elevation Music Festival — Video Estimate - Elevation Music Festival — Elevation Music Festival — Sent — $12,483.00 — 0 — Apr 12, 2026 — Mar 14
QTE-2026-0366 Consulting Engagement - Harborview Properties — Consulting Engagement - Harborview Properties — Harborview Properties — Sent — $28,360.50 — 0 — Apr 12, 2026 — Mar 14
QTE-2026-0895 Event Branding Proposal - Harborview Properties — Event Branding Proposal - Harborview Properties — Harborview Properties — Accepted — $31,098.00 — 0 — Apr 12, 2026 — Mar 14
QTE-2026-1925 Campaign Production - Vista Wellness Retreats — Campaign Production - Vista Wellness Retreats — Vista Wellness Retreats — Accepted — $31,864.50 — 0 — Apr 12, 2026 — Mar 14
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 — Mar 14
QTE-2026-1987 Service Contract - Elevation Music Festival — Service Contract - Elevation Music Festival — Elevation Music Festival — Declined — $41,829.00 — 0 — Apr 12, 2026 — Mar 14
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 — Mar 13
QTE-2026-1885 Social Retainer - Elevation Music Festival — Social Retainer - Elevation Music Festival — Elevation Music Festival — Viewed — $12,373.50 — 0 — Apr 11, 2026 — Mar 13
QTE-2026-0352 Social Retainer - Pacific Coast Hospitality — Social Retainer - Pacific Coast Hospitality — Pacific Coast Hospitality — Accepted — $49,165.50 — 0 — Apr 11, 2026 — Mar 13
QTE-2026-0616 Marketing Retainer - Riverside Convention Center — Marketing Retainer - Riverside Convention Center — Riverside Convention Center — Sent — $44,238.00 — 0 — Apr 11, 2026 — Mar 13
QTE-2026-1408 Marketing Retainer - Sunset Events Group — Marketing Retainer - Sunset Events Group — Sunset Events Group — Draft — $16,972.50 — 0 — Apr 11, 2026 — Mar 13
QTE-2026-0137 Photography Quote - Pacific Coast Hospitality — Photography Quote - Pacific Coast Hospitality — Pacific Coast Hospitality — Accepted — $30,550.50 — 0 — Apr 11, 2026 — Mar 13
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 — Mar 13
Showing 1 to 20 of 2015 records
Previous 1 2 ... 101 Next

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