

Air4media Pilot v10 BETA
ACME Creative Agency SEARCH
ACME Creative Agency
Laurent P Groult

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Quotes

All Status
+ New Quote

Quote #	Title	Account	Status	Total	Items	Valid Until	Created	Actions
QTE-2026-007	Vista 2026 Brand Campaign <small>Vista 2026 Brand Campaign</small>	Vista Wellness Retreats	Draft	\$197,100.00	0	Apr 29, 2026	3d ago	👁 📄 🗑
QTE-2026-0551	SEO Package - Vista Wellness Retreats <small>SEO Package - Vista Wellness Retreats</small>	Vista Wellness Retreats	Accepted	\$13,359.00	0	Apr 12, 2026	4d ago	👁 📄 🗑
QTE-2026-1114	Video Estimate - Elevation Music Festival <small>Video Estimate - Elevation Music Festival</small>	Elevation Music Festival	Sent	\$12,483.00	0	Apr 12, 2026	4d ago	👁 📄 🗑
QTE-2026-0366	Consulting Engagement - Harborview Properties <small>Consulting Engagement - Harborview Properties</small>	Harborview Properties	Sent	\$28,360.50	0	Apr 12, 2026	4d ago	👁 📄 🗑
QTE-2026-0895	Event Branding Proposal - Harborview Properties <small>Event Branding Proposal - Harborview Properties</small>	Harborview Properties	Accepted	\$31,098.00	0	Apr 12, 2026	4d ago	👁 📄 🗑
QTE-2026-1925	Campaign Production - Vista Wellness Retreats <small>Campaign Production - Vista Wellness Retreats</small>	Vista Wellness Retreats	Accepted	\$31,864.50	0	Apr 12, 2026	4d ago	👁 📄 🗑
QTE-2026-0139	UX/UI Quote - Riverside Convention Center <small>UX/UI Quote - Riverside Convention Center</small>	Riverside Convention Center	Viewed	\$11,497.50	0	Apr 12, 2026	4d ago	👁 📄 🗑
QTE-2026-1987	Service Contract - Elevation Music Festival <small>Service Contract - Elevation Music Festival</small>	Elevation Music Festival	Declined	\$41,829.00	0	Apr 12, 2026	4d ago	👁 📄 🗑
QTE-2026-1827	Identity Proposal - Golden State Catering Co. <small>Identity Proposal - Golden State Catering Co.</small>	Golden State Catering Co.	Declined	\$29,017.50	0	Apr 11, 2026	5d ago	👁 📄 🗑
QTE-2026-1885	Social Retainer - Elevation Music Festival <small>Social Retainer - Elevation Music Festival</small>	Elevation Music Festival	Viewed	\$12,373.50	0	Apr 11, 2026	5d ago	👁 📄 🗑
QTE-2026-0352	Social Retainer - Pacific Coast Hospitality <small>Social Retainer - Pacific Coast Hospitality</small>	Pacific Coast Hospitality	Accepted	\$49,165.50	0	Apr 11, 2026	5d ago	👁 📄 🗑
QTE-2026-0616	Marketing Retainer - Riverside Convention Center <small>Marketing Retainer - Riverside Convention Center</small>	Riverside Convention Center	Sent	\$44,238.00	0	Apr 11, 2026	5d ago	👁 📄 🗑
QTE-2026-1408	Marketing Retainer - Sunset Events Group <small>Marketing Retainer - Sunset Events Group</small>	Sunset Events Group	Draft	\$16,972.50	0	Apr 11, 2026	5d ago	👁 📄 🗑
QTE-2026-0137	Photography Quote - Pacific Coast Hospitality <small>Photography Quote - Pacific Coast Hospitality</small>	Pacific Coast Hospitality	Accepted	\$30,550.50	0	Apr 11, 2026	5d ago	👁 📄 🗑
QTE-2026-1475	Content Production Pkg - Meridian Tech Solutions <small>Content Production Pkg - Meridian Tech Solutions</small>	Meridian Tech Solutions	Declined	\$37,996.50	0	Apr 11, 2026	5d ago	👁 📄 🗑
QTE-2026-0310	Consulting Engagement - Meridian Tech Solutions <small>Consulting Engagement - Meridian Tech Solutions</small>	Meridian Tech Solutions	Sent	\$2,847.00	0	Apr 10, 2026	6d ago	👁 📄 🗑
QTE-2026-1612	Media Buying Proposal - Elevation Music Festival <small>Media Buying Proposal - Elevation Music Festival</small>	Elevation Music Festival	Draft	\$43,143.00	0	Apr 10, 2026	6d ago	👁 📄 🗑
QTE-2026-1623	Campaign Production - Meridian Tech Solutions <small>Campaign Production - Meridian Tech Solutions</small>	Meridian Tech Solutions	Sent	\$41,391.00	0	Apr 10, 2026	6d ago	👁 📄 🗑
QTE-2026-1889	Social Retainer - Luxe Brand Studios <small>Social Retainer - Luxe Brand Studios</small>	Luxe Brand Studios	Declined	\$13,797.00	0	Apr 10, 2026	6d ago	👁 📄 🗑
QTE-2026-0379	Event Branding Proposal - Harborview Properties <small>Event Branding Proposal - Harborview Properties</small>	Harborview Properties	Sent	\$53,764.50	0	Apr 10, 2026	6d ago	👁 📄 🗑

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Quotes

Create and send professional quotes to clients, track their status, and convert accepted quotes into contracts or invoices.

Key Features

- **Quote List:** View all quotes with quote number, title, account, status, total, item count, valid date, and creation time
- **Status Tracking:** Follow each quote through its lifecycle — Draft, Sent, Viewed, Accepted, Declined, Expired, or Revised
- **Line Items:** Build quotes from custom items, catalog products, or pre-built packages
- **Sections:** Group line items under named headings to organize complex quotes clearly
- **Pricing Controls:** Apply per-item discounts, a quote-level discount (fixed or percentage), and a tax rate
- **Taxable Items:** Tax applies only to items marked taxable — set automatically when adding from your catalog; tax is proportionally adjusted when a discount is applied
- **Optional Items:** Mark add-ons as optional so clients can choose them without inflating the base total
- **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
- **Duplicate:** Copy any existing quote as a new draft to speed up repeat work
- **Filter & Search:** Filter by status or search by quote number or title
- **Automation Triggers:** Accepted quotes can trigger automated workflows

How to Use

Create a Quote

1. Click **New Quote** in the top-right corner
2. Enter a **Title** and select the **Account** (both required) — for example, "Spring Campaign" for ACME Creative Agency
3. Optionally link a **Project** and **Contact** — the 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 intro message, payment terms, terms & conditions, and a closing message as needed
6. Add **Internal Notes** for your team — these are never shown to the client
7. Click **Save Quote**

Add Line Items

In the right panel of the quote editor:

1. Click **Custom Item** to add a freeform line item (Service, Product, Labor, or Expense)
2. Click **Product** to pick from your catalog — taxable status and pricing carry over automatically; products are grouped by type (Services, Products, Rentals, Labor) for easy browsing
3. Click **Package** to add a pre-built bundle — the savings vs. individual items are shown right in the picker
4. For each item, set the name, quantity, unit price, and an optional per-item discount
5. Use the **Section** field to group related items under a named heading
6. Check **Optional** to mark items as add-ons — excluded from the total unless the client selects them

Send a Quote

- Open a draft quote and click **Send to Client**, or use the **Send** action directly from the quote list
- The 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 to the quote, the signed contract is generated automatically on acceptance.

After Acceptance

- Click **Convert to Contract** to create a draft contract from the quote
- Click **Convert to Invoice** to create a draft invoice with all line items carried over
- If you use Workflows, quote acceptance can trigger automated follow-up actions

Manage the List

- Use the **Status** filter to view quotes by stage
- Click **Duplicate** on any row to copy a quote as a new draft (valid date resets to 30 days)
- Select multiple quotes and click **Delete Selected** to remove them in bulk

Tips

- Quote numbers are auto-generated in the format QTE-YEAR-NNNN
- Valid dates shown in red indicate the quote has passed its expiry
- Optional items let you present upsell choices without inflating the base total
- Tax is calculated only on taxable items and proportionally adjusted when a discount is applied
- 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