



Air4media Pilot v10 BETA
ACME Creative Agency BETA
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	Vista Wellness Retreats	Draft	\$197,100.00	0	Apr 29, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0551	SEO Package - Vista Wellness Retreats	Vista Wellness Retreats	Accepted	\$13,359.00	0	Apr 12, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1114	Video Estimate - Elevation Music Festival	Elevation Music Festival	Sent	\$12,483.00	0	Apr 12, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0366	Consulting Engagement - Harborview Properties	Harborview Properties	Sent	\$28,360.50	0	Apr 12, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0895	Event Branding Proposal - Harborview Properties	Harborview Properties	Accepted	\$31,098.00	0	Apr 12, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1925	Campaign Production - Vista Wellness Retreats	Vista Wellness Retreats	Accepted	\$31,864.50	0	Apr 12, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span> <span style="color: orange;">🗨️</span>
QTE-2026-0139	UX/UI Quote - Riverside Convention Center	Riverside Convention Center	Viewed	\$11,497.50	0	Apr 12, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1987	Service Contract - Elevation Music Festival	Elevation Music Festival	Declined	\$41,829.00	0	Apr 12, 2026	26d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1827	Identity Proposal - Golden State Catering Co.	Golden State Catering Co.	Declined	\$29,017.50	0	Apr 11, 2026	27d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1885	Social Retainer - Elevation Music Festival	Elevation Music Festival	Viewed	\$12,373.50	0	Apr 11, 2026	27d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0352	Social Retainer - Pacific Coast Hospitality	Pacific Coast Hospitality	Accepted	\$49,165.50	0	Apr 11, 2026	27d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0616	Marketing Retainer - Riverside Convention Center	Riverside Convention Center	Sent	\$44,238.00	0	Apr 11, 2026	27d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1408	Marketing Retainer - Sunset Events Group	Sunset Events Group	Draft	\$16,972.50	0	Apr 11, 2026	27d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0137	Photography Quote - Pacific Coast Hospitality	Pacific Coast Hospitality	Accepted	\$30,550.50	0	Apr 11, 2026	27d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1475	Content Production Pkg - Meridian Tech Solutions	Meridian Tech Solutions	Declined	\$37,996.50	0	Apr 11, 2026	27d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0310	Consulting Engagement - Meridian Tech Solutions	Meridian Tech Solutions	Sent	\$2,847.00	0	Apr 10, 2026	28d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1612	Media Buying Proposal - Elevation Music Festival	Elevation Music Festival	Draft	\$43,143.00	0	Apr 10, 2026	28d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1623	Campaign Production - Meridian Tech Solutions	Meridian Tech Solutions	Sent	\$41,391.00	0	Apr 10, 2026	28d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-1889	Social Retainer - Luxe Brand Studios	Luxe Brand Studios	Declined	\$13,797.00	0	Apr 10, 2026	28d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>
QTE-2026-0379	Event Branding Proposal - Harborview Properties	Harborview Properties	Sent	\$53,764.50	0	Apr 10, 2026	28d ago	<span>🔍</span> <span>📄</span> <span>🗑️</span>

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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