

Fynl.io Quotes and proposals

Build a proposal, watch the client's email appear live, then turn the accepted quote into a contract or an invoice.

WHAT THIS ADDS

A quote in a Word doc starts a pile of manual follow-up. In Fynl.io the proposal is built beside a live preview of the branded email the client will receive, nothing is sent until you press Send on the review screen, and once the client accepts you are one click from a contract, a deposit invoice or the full invoice.

Where Quotes lives

In the Fynl.io portal sidebar, under **Sales**, open **Quotes**. The page is called *Quotes & proposals*. At the top four counters show **Awaiting answer**, **Accepted**, **Value accepted** and **Total quotes**.

Build a proposal

Under **New proposal**, enter the client or company and their email. Pick a saved package or leave it blank, set **Valid until**, then type each line with its quantity and price. Add more lines with **+ Add line** or **Insert a product**, and set a **Tax %**. The total updates as you type.

The live email preview

On the right, **Proposal email — live preview** shows the branded email the client will get, with their name and your lines filling in as you type. Switch between **Desktop** and **Phone**. The page says nothing is sent until you press Send on the review screen; you can also save it as a draft.

Packages and settings

In **Your packages & settings**, save the packages you sell most so they become one-click proposals. **Proposals stay valid for** a number of days you set (the default shown is 14), and an **automatic reminder** goes out if a proposal is unanswered after the number of days you choose (the default shown is 3). The reminder is one friendly branded email per proposal.

All proposals and what comes next

All proposals lists every proposal, newest first, with its status: *Draft*, *Sent* or *Accepted*. You can **Edit**, **Mark accepted** or **Mark declined**, **Resend** or **Preview**. An accepted proposal shows → **Contract**, → **Deposit invoice** and → **Full invoice**.

DO THIS

Open Quotes, type a client name and one line item, and watch the email on the right fill in before you send anything.

What Fynl.io is

One portal a small business runs itself on, instead of five subscriptions that do not talk to each other.

- A CRM and pipeline that shows every lead and where it stopped
- A calendar clients can book straight into
- Quotes, contracts and invoices, with deposits taken up front
- A website and form builder, so the enquiry lands in the same place
- Your Gmail connected, so the whole thread sits on the contact
- Automations for the follow-up you keep forgetting to send

The AI runs on **your own Claude or ChatGPT API key** — no markup on it. No SMS or phone calls yet. \$49/month per business, \$149 Agency, and we move your contacts over for you.

Quotes sit in the same Fynl.io portal as Contracts and Invoices, so an accepted proposal moves straight on to either one.