

# Mobile Estimates

Download Mobile Estimates PDF

## Accessing the Estimates Section

1. Tap the **menu icon** (three horizontal bars) in the upper-left corner.
2. Select **Estimates** from the menu.

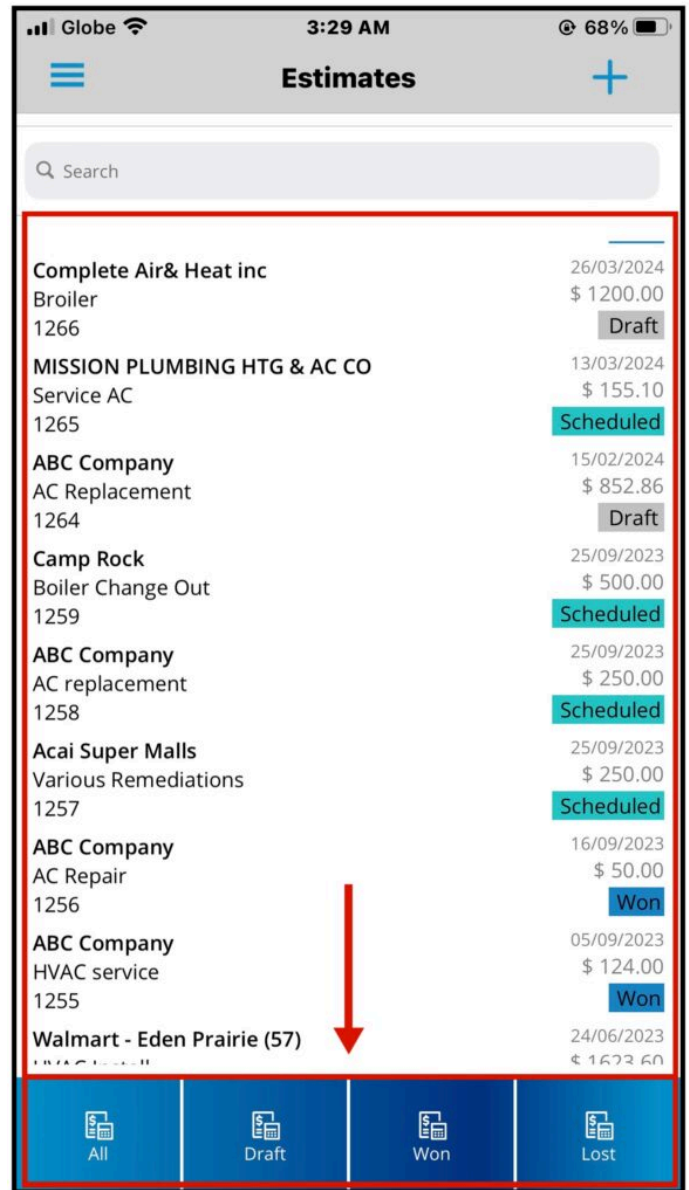


## Estimates Page Overview

On the Estimates page, you'll find a list of all estimates with their current status. You can view estimates by selecting one of the four tabs at the bottom:

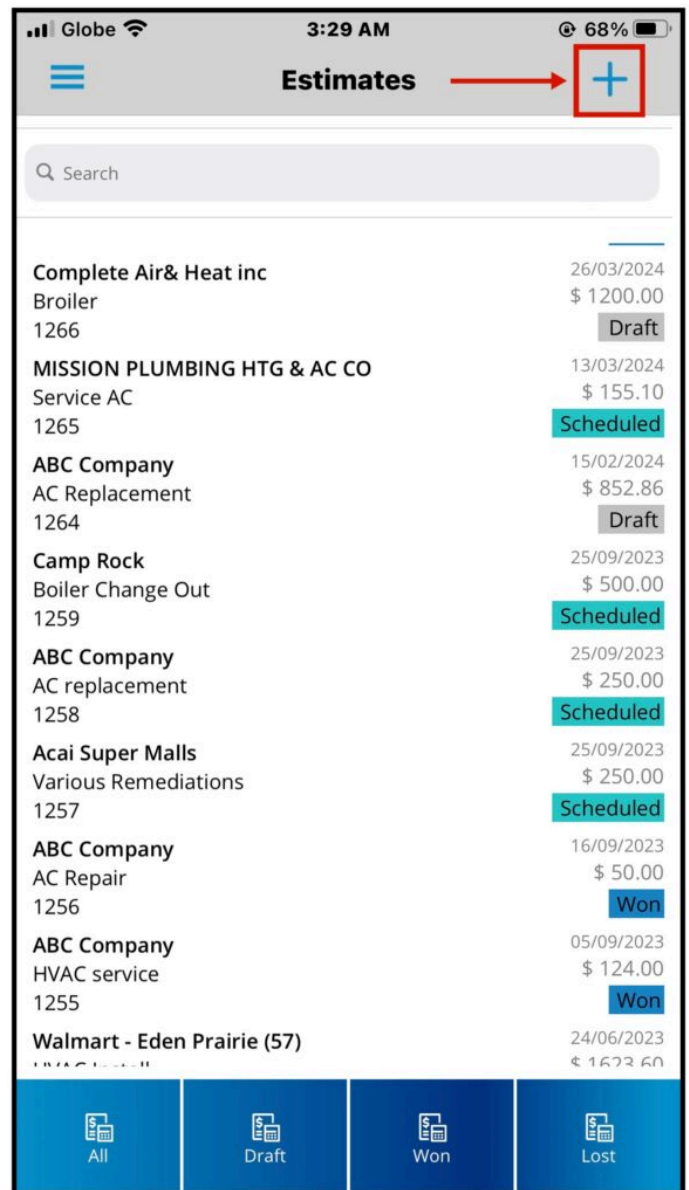
- **All** – Shows all estimates
- **Draft** – Displays estimates that are drafts
- **Won** – Lists estimates that have been accepted
- **Lost** – Displays estimates that were declined

By default, the **All** tab is selected, showing estimates with all statuses.



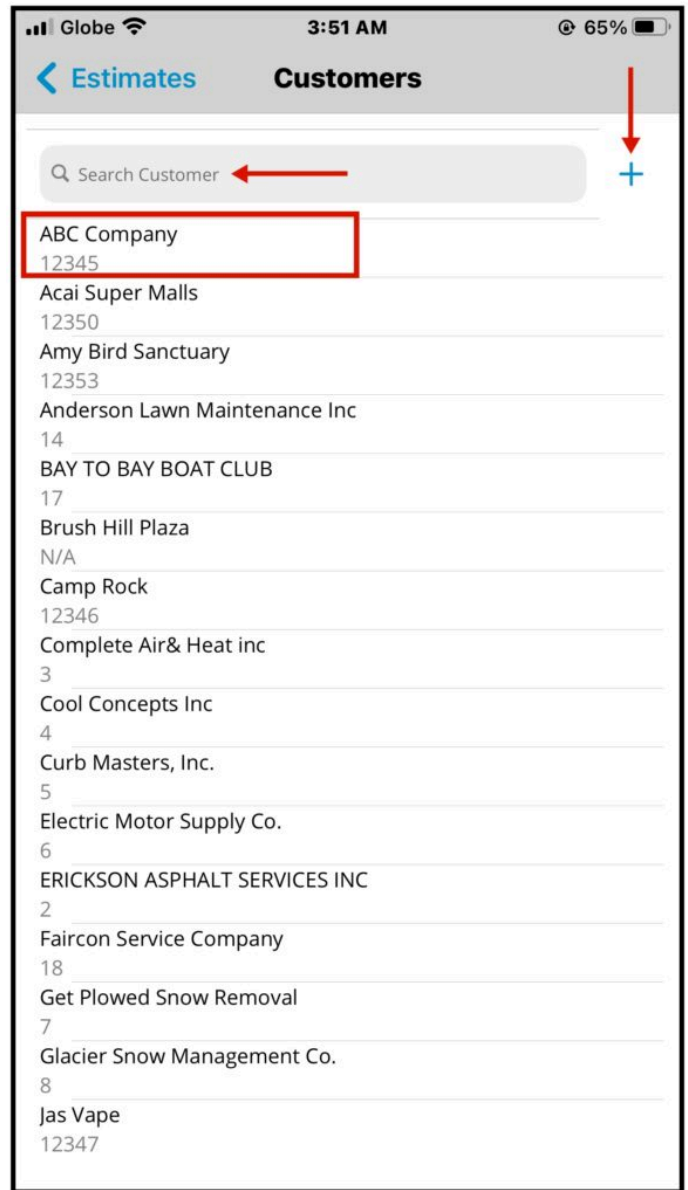
## Adding a New Estimate

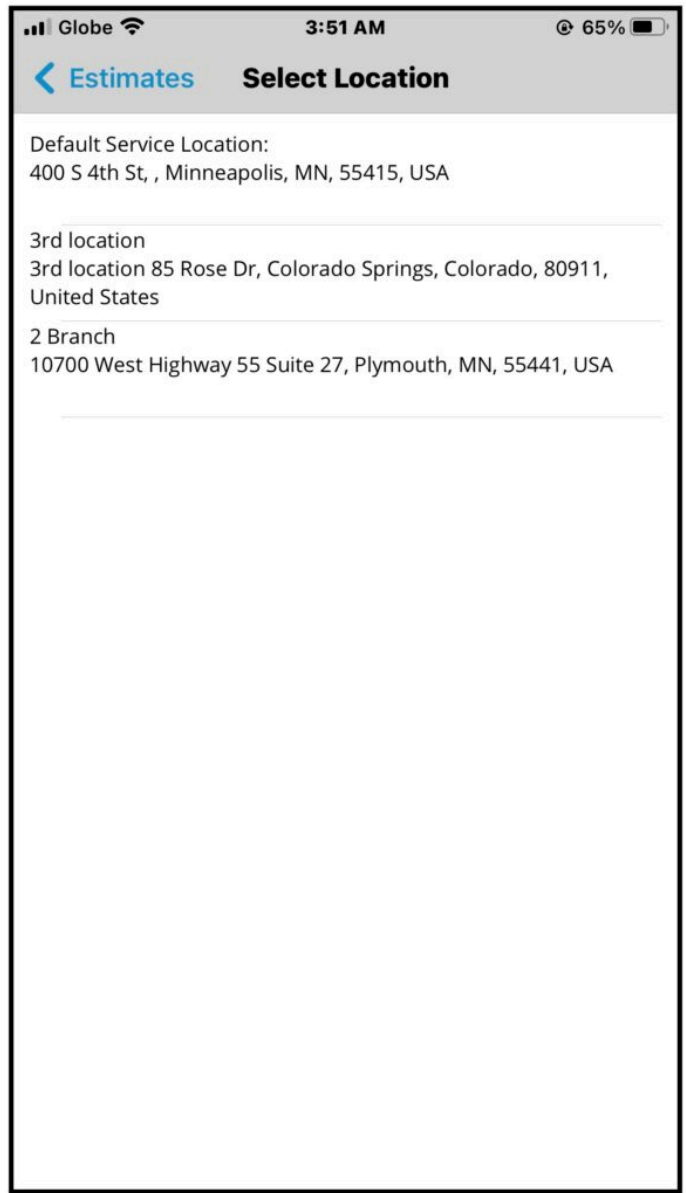
Tap the **Add (+)** button in the top-right corner.



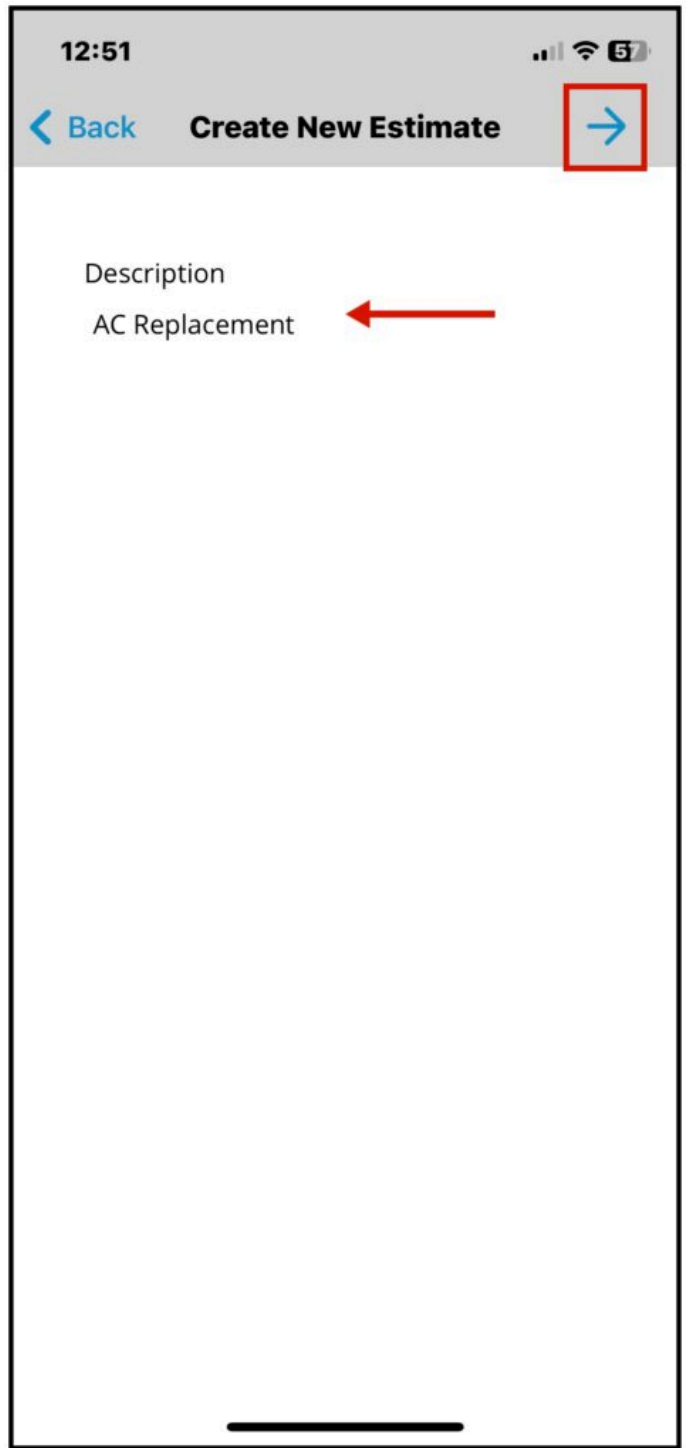
Select an existing customer from the list, or use the search bar to find them.

If you're creating an estimate for a new customer, tap + to add a new customer.





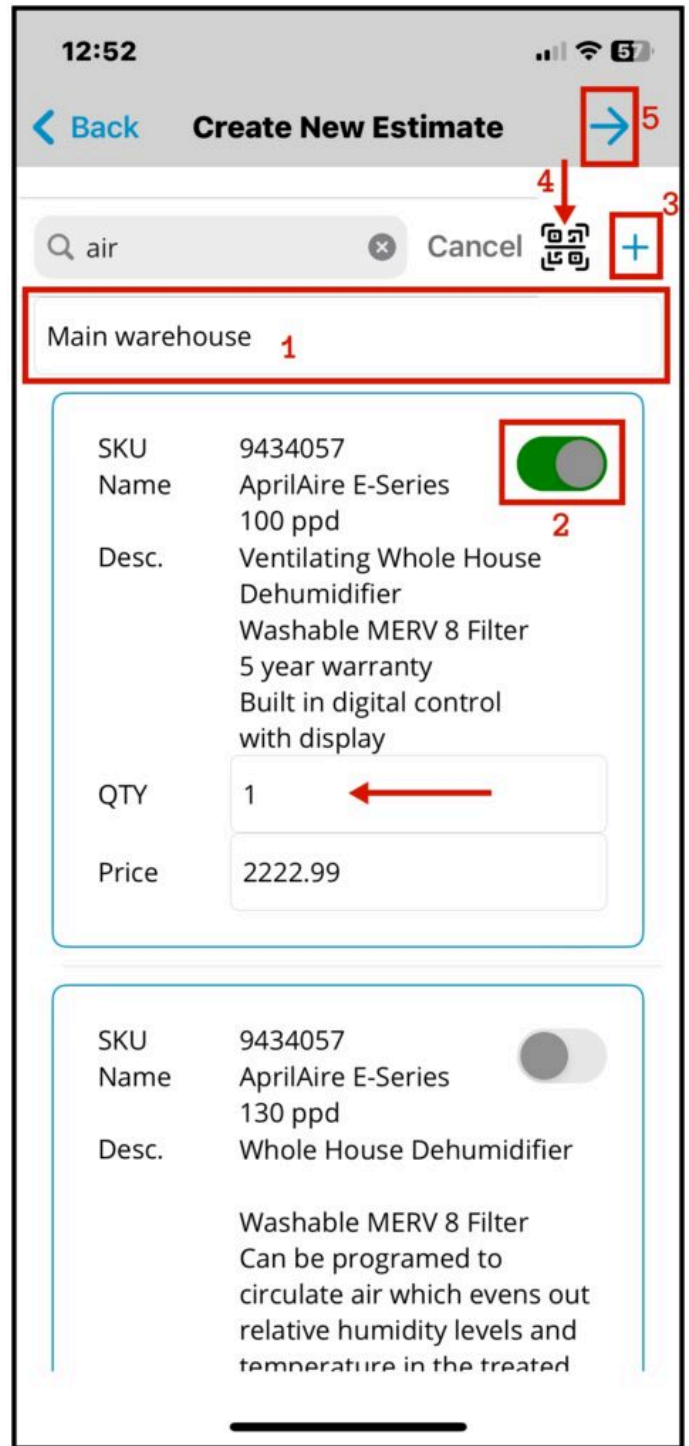
After selecting a customer, **if the customer has multiple service locations it will redirect you to the list of all service locations.** Select one and it will proceed.



Enter a description for the estimate, then tap the **arrow icon** to continue.

### Adding Items to the Estimate

1. Select the **warehouse** where you'll source the items.
2. Find the items you need by searching or scrolling, and tap the **slider bar** on the right to select each item.
  - Adjust the **quantity (QTY)** as needed.
3. If the item isn't listed, tap **+** to add a new item.
4. If the item has a barcode, tap **Scan** at the top-right to scan it.
5. Once items are selected, tap the **arrow icon** to proceed.



Once the required items have been selected, you'll be directed to the Estimate Preview screen with the details of the part and prices.

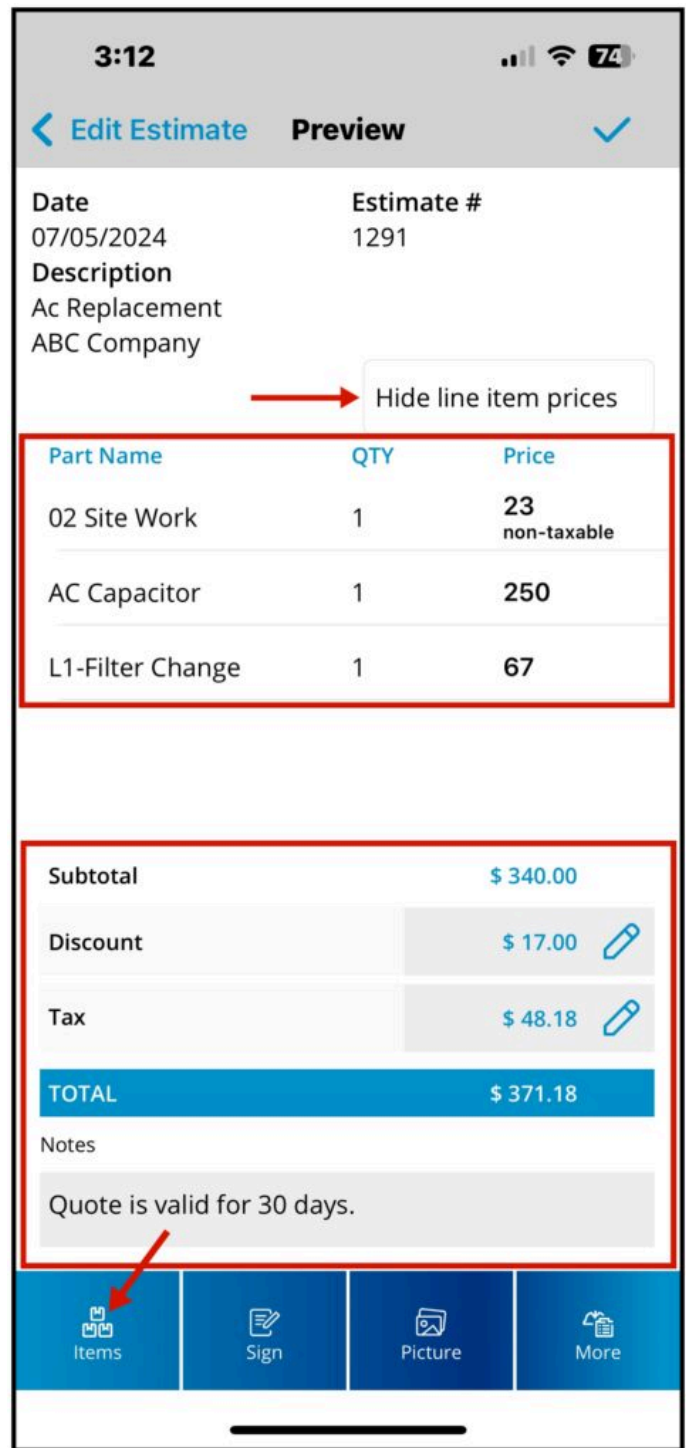
Tap on Hide line item prices, this will give you the option to **Show all the pricing** (Unit Price and Line item discount). **When selected, you can add/edit line item discounts.**

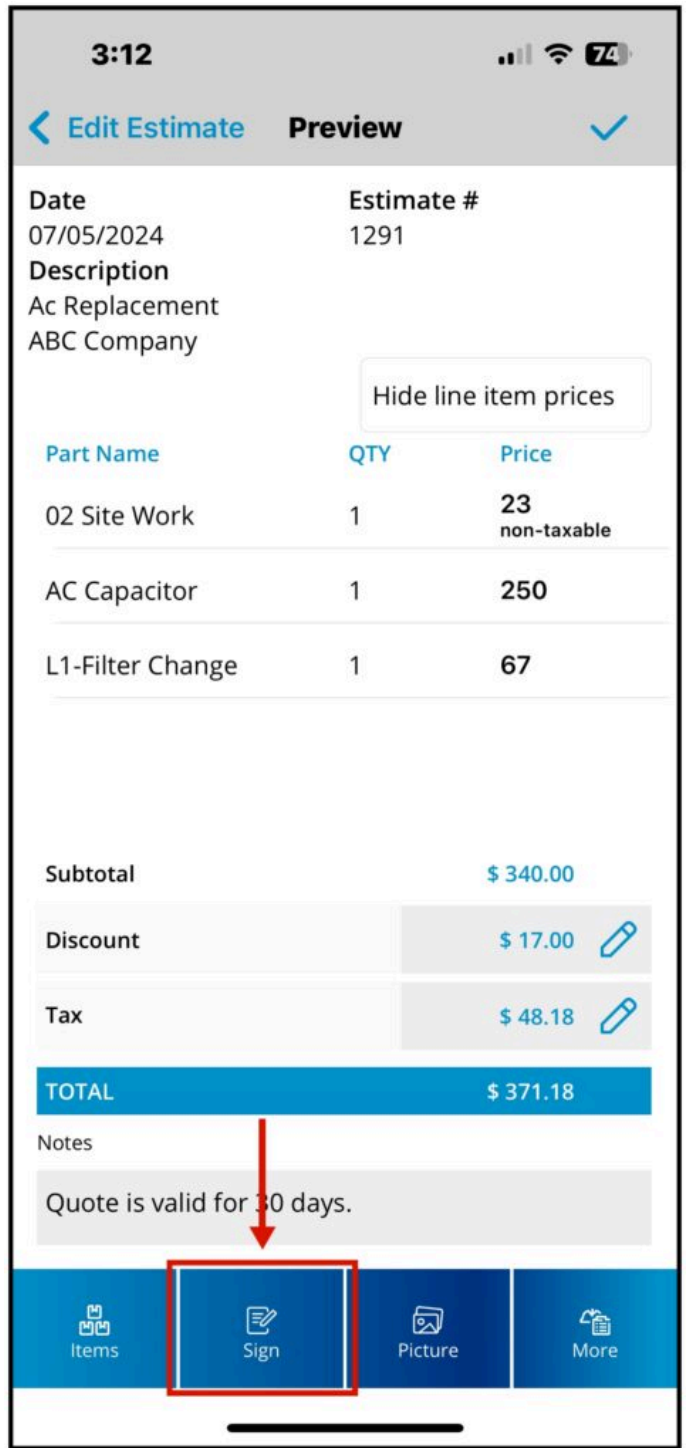
If you need to add more items, just **tap the Item button and add more items** to the estimate.

**Add tax or discount**, it will give you the option to add tax or discount in **percentage value or monetary value.**

**Notes** – Type in Notes for Customer.

**Save the estimate** by clicking on the check icon on the top right.





## Sign

Tap **Sign** to open the signature pad.

## Sign

After clicking on the sign, the signature pad will pop up. Place your signature and select if you want to perform the work now or later. Click on the check icon on the top right to save.

**Perform work later** – Marks the estimate as “Won” and saves it.

**Perform work now** – Allows you to create a new job or add a task to an existing job.

12:41

Signature Signature Pad

Clear

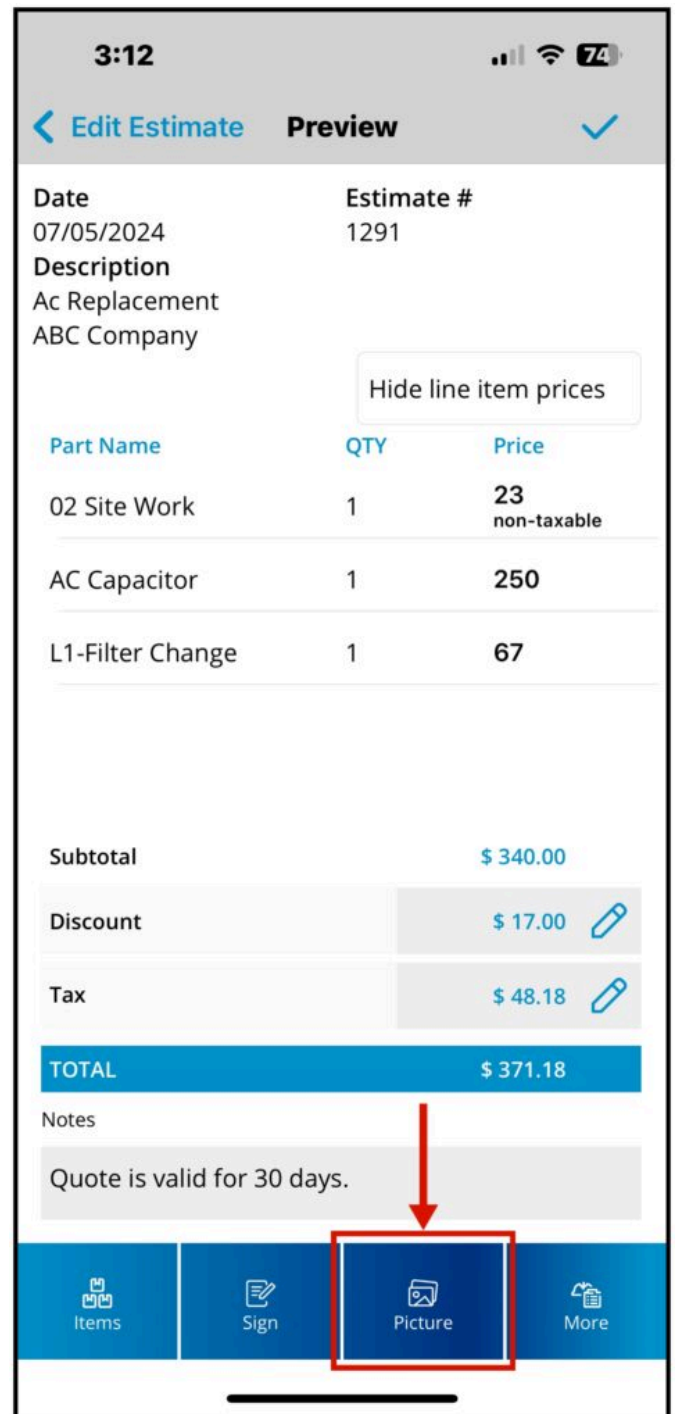
Sign in the blue area

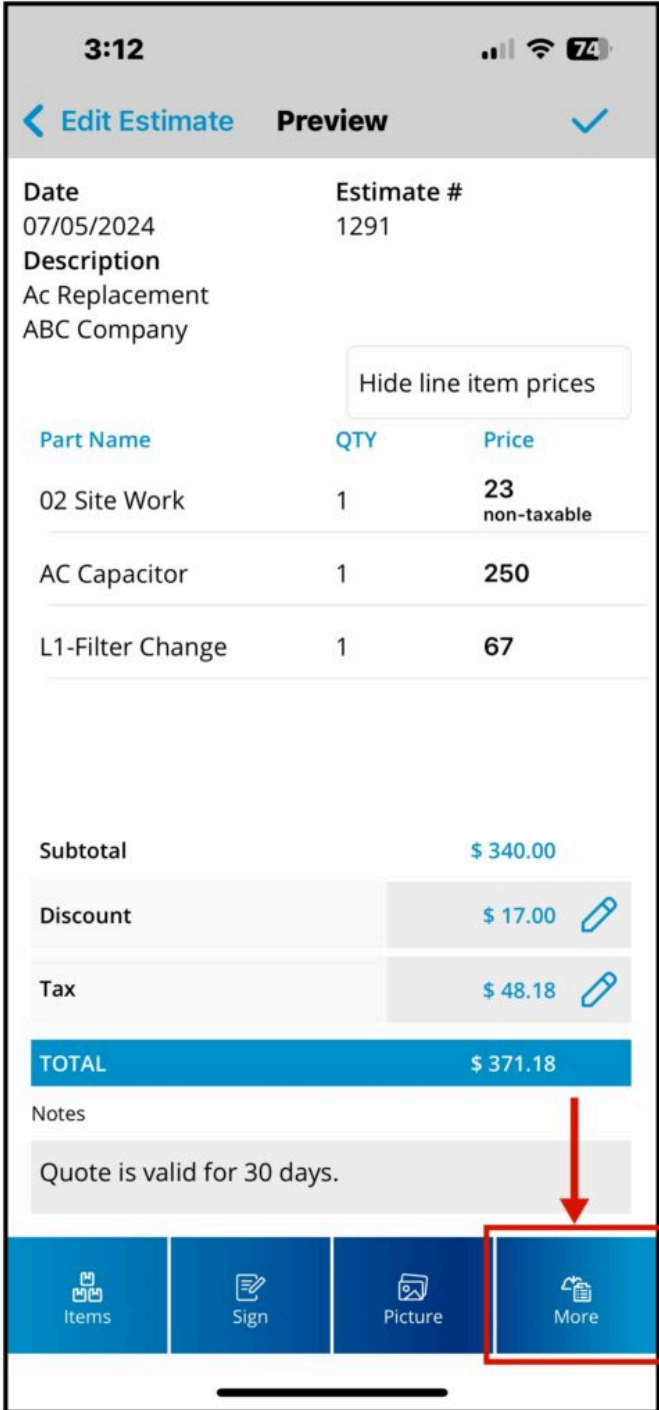
Perform Work Later

Perform Work Now

### Attach Picture to Estimate

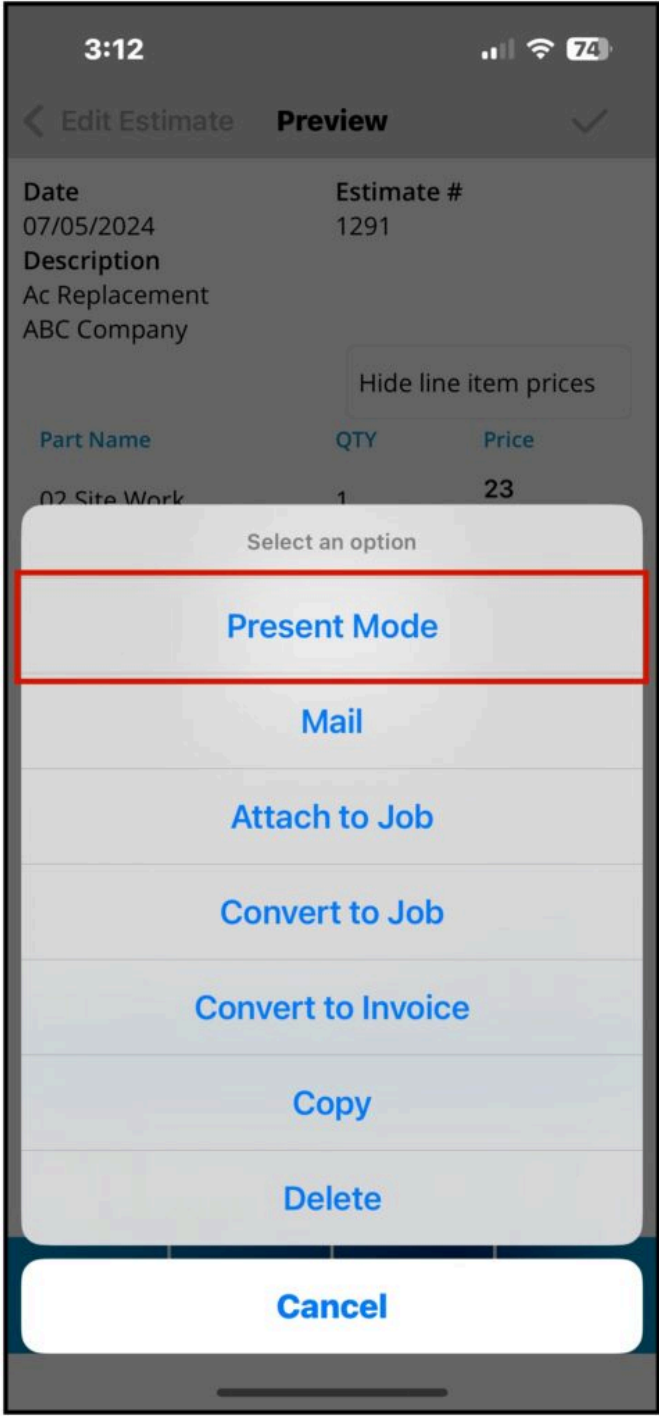
To attach pictures to estimate, click on the **Picture Tab**. It will let you choose to attach pictures from the gallery or open your camera.





**More Tab**

Other options will show once you have tapped **More**.

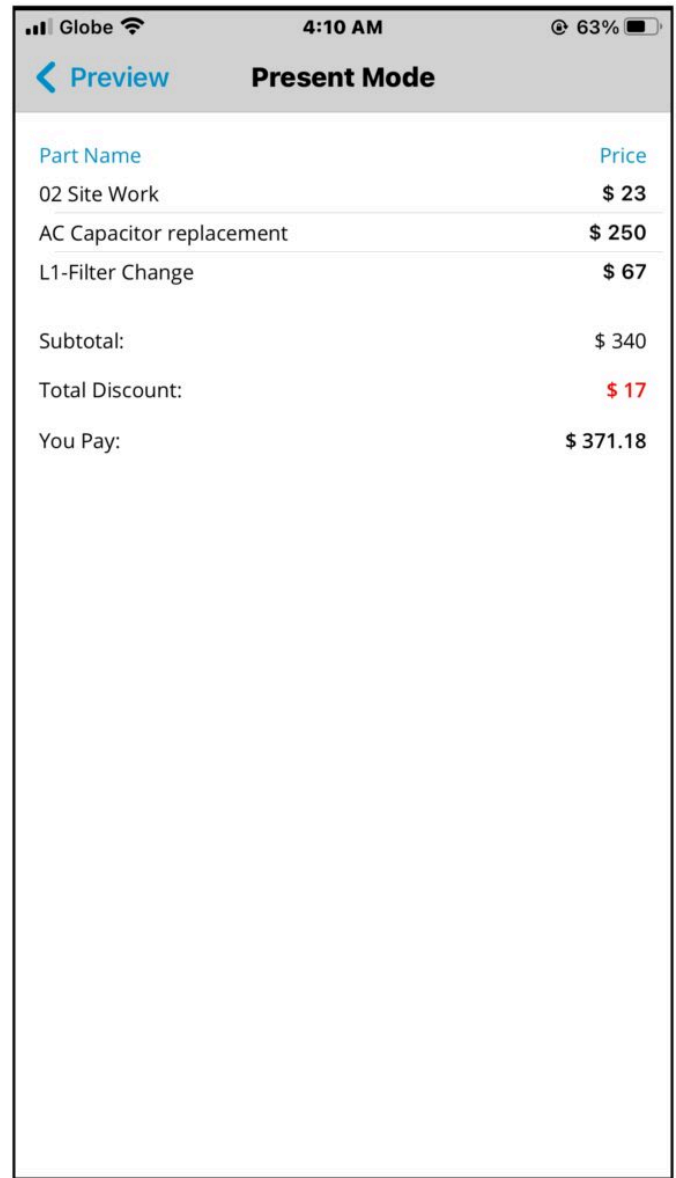


**Present Mode**

Estimate presentation mode

## Present Mode

This will provide a detailed presentation of the estimated items, including the subtotal, total discount, and the final amount due.



The screenshot shows a mobile application interface in 'Present Mode'. At the top, the status bar displays 'Globe' with signal strength, '4:10 AM', and '63%' battery. Below the status bar is a navigation bar with a blue back arrow and the text 'Preview', and the title 'Present Mode'. The main content is a list of items with their prices, followed by a subtotal, a discount, and the final amount to be paid.

Part Name	Price
02 Site Work	\$ 23
AC Capacitor replacement	\$ 250
L1-Filter Change	\$ 67
Subtotal:	\$ 340
Total Discount:	\$ 17
You Pay:	\$ 371.18

## Other Options

**Mail** – Send the estimate through email right away.

**Attach to Job** – The estimate's information will be copied and attached to an existing job.

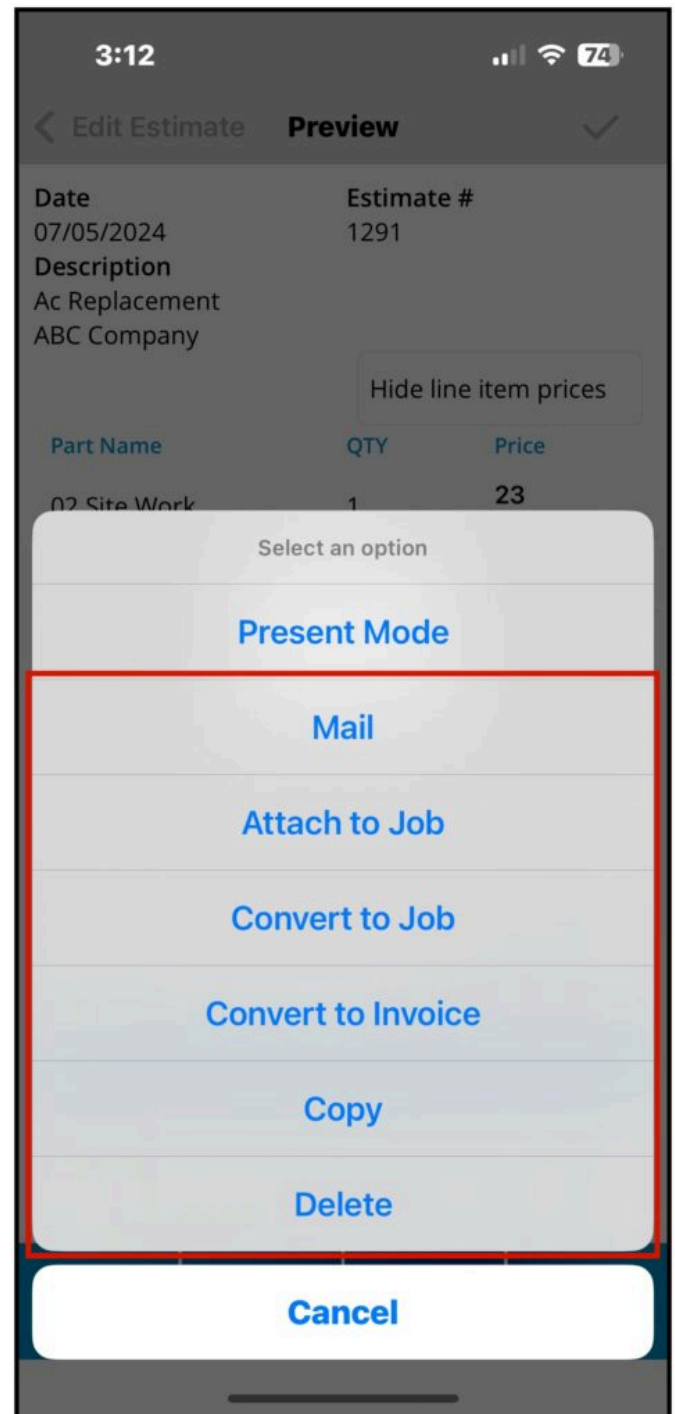
**Convert to Job** – The estimate information will be copied and will be converted into a new job.

**Convert to Invoice** – This will convert the estimate into an invoice.

**Copy** – The estimate's information will be copied and you will be prompted to select a customer to whom the estimate will be assigned.

**Delete**– This will remove the estimate.

Click on **Convert to Invoice**.



You will notice that the status has changed to **Invoiced** after tapping into **Convert Invoice**.



## Convert to Job

After clicking on convert to job, notice that the estimate status will change to **Scheduled**.

The estimate will automatically be converted into a job and assigned to you.

If you go to the Job Module, the job that we converted from the estimate will be listed there.



Company	Service	Amount	Date	Status
Complete Air& Heat inc	Broiler	\$ 1200.00	26/03/2024	Draft
MISSION PLUMBING HTG & AC CO	Service AC	\$ 155.10	13/03/2024	Scheduled
ABC Company	AC Replacement	\$ 852.86	15/02/2024	Draft
Camp Rock	Boiler Change Out	\$ 500.00	25/09/2023	Scheduled
ABC Company	AC replacement	\$ 250.00	25/09/2023	Scheduled
Acai Super Malls	Various Remediations	\$ 250.00	25/09/2023	Scheduled
ABC Company	AC Repair	\$ 50.00	16/09/2023	Won
ABC Company	HVAC service	\$ 124.00	05/09/2023	Won
Walmart - Eden Prairie (57)		\$ 1623.60	24/06/2023	

## Save Estimate

The estimate will now be listed in the **Estimate All and Draft List.**

Company	Service	Amount	Status	Date
ABC Company	Ac Replacement	\$ 371.18	Draft	07/05/2024
MISSION PLUMBING HTG & AC CO	Various Remediations	\$ 292.00	Won	02/05/2024
Curb Masters, Inc.	AC replacement	\$ 34.00	Invoiced	02/05/2024
ABC Company	Various Remediations	\$ 255.65	Lost	02/05/2024
ERICKSON ASPHALT SERVICES INC	On Call Service	\$ 91.00	Draft	23/04/2024
Curb Masters, Inc.	AC replacement	\$ 34.00	Draft	23/04/2024
Camp Rock	Boiler Change Out	\$ 500.00	Won	23/04/2024
Brush Hill Plaza	Kitchen Make over	\$ 327.00	Lost	23/04/2024
Acai Super Malls	Broiler	\$ 284.00		23/04/2024

Bottom Navigation Bar:

- All
- Draft
- Won
- Lost

