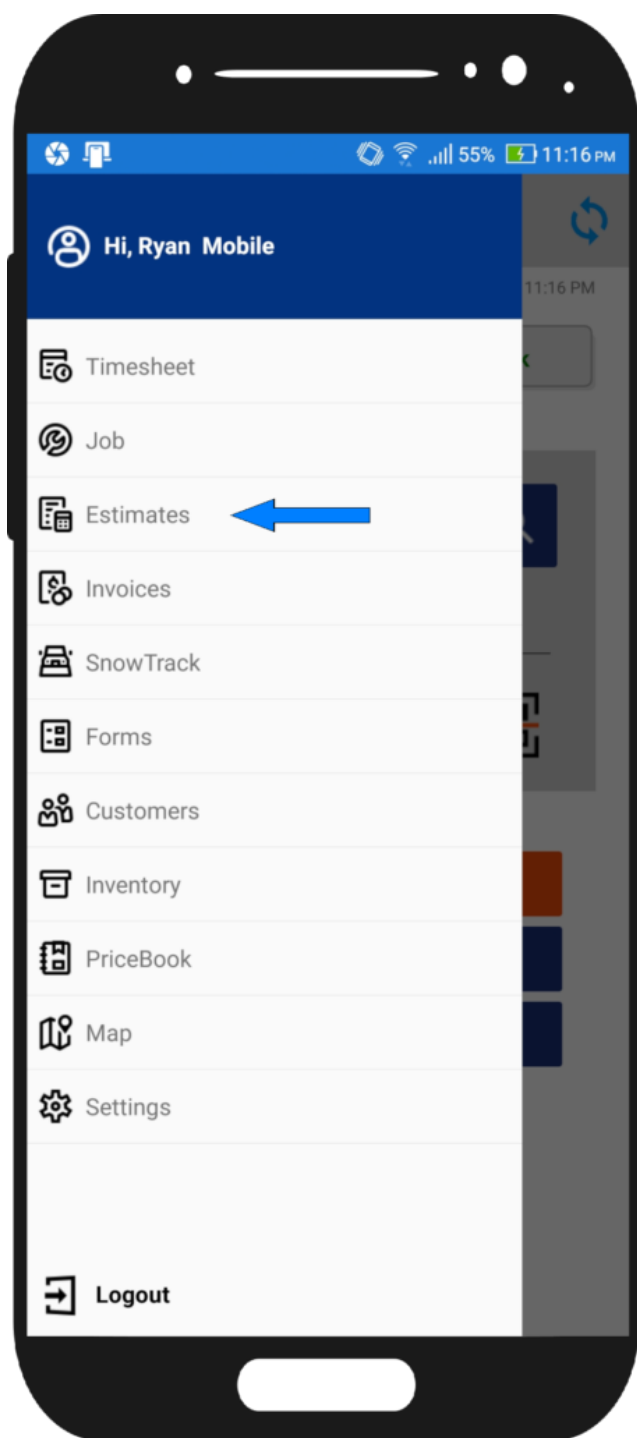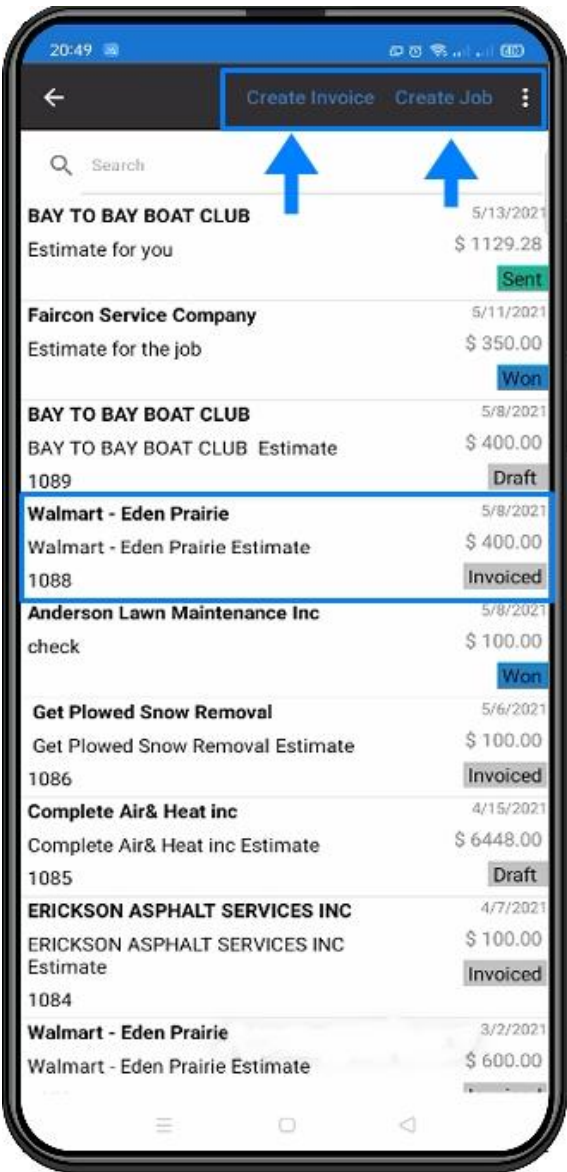# Mobile Estimates/Jobs Convert to Invoice

Converting Estimates to Invoice

Before you can do any conversion, access the **Estimates Page** by tapping the three horizontal bar Icon on the upper left of the IndusTrack default page. Look for **Estimates**.

https://support2.industrack.com/?lsvr_kba=mobile-estimates-convert-to-invoice

When you get to the Estimate page, tap and hold the estimate if you are using Android, swipe left on the estimate if you are using an iPhone.

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

https://support2.industrack.com/?lsvr_kba=mobile-estimates-convert-to-invoice
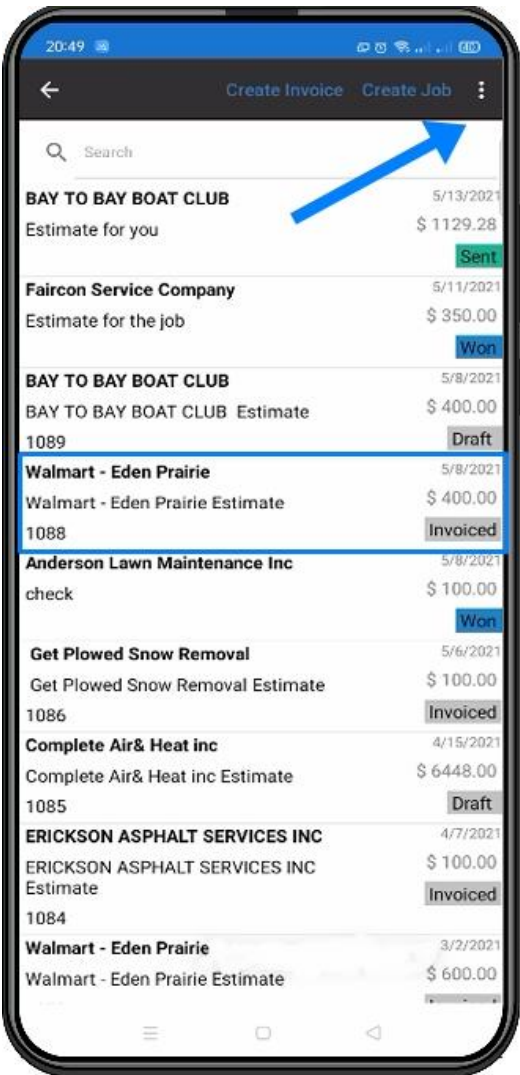
Other Options

There are other actions/options for the estimates. When you get to the Estimate page, tap and hold the estimate if you are using Android, swipe left on the estimate if you are using an iPhone.
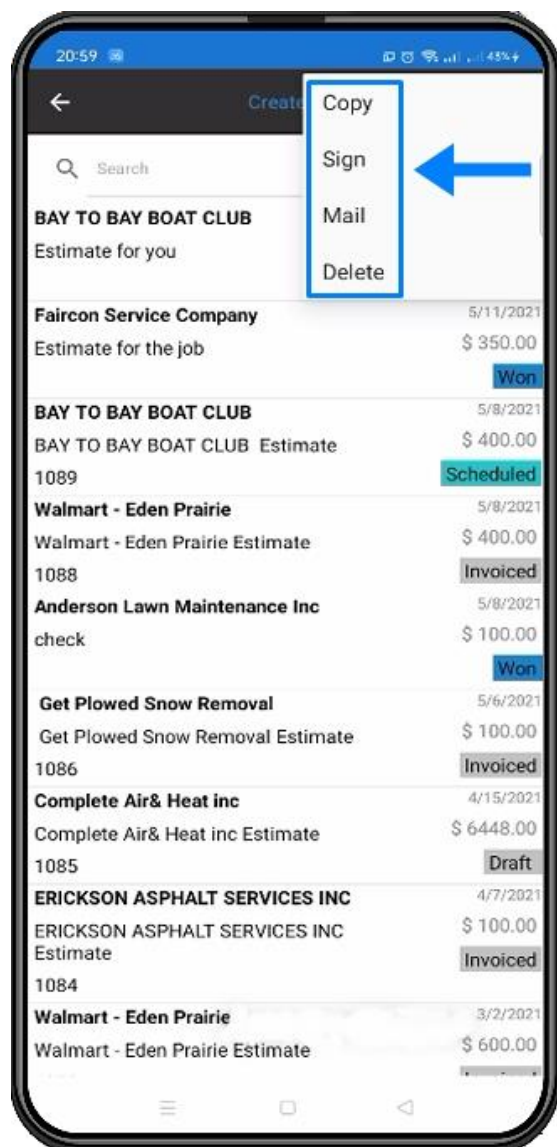
Tap the 3 dots at the top right of the screen to show more options.

Other option will show once you have tapped on the 3 dots.

Copy – estimate's information will be copied and you will be prompted to select a customer to where the estimate will be assigned.
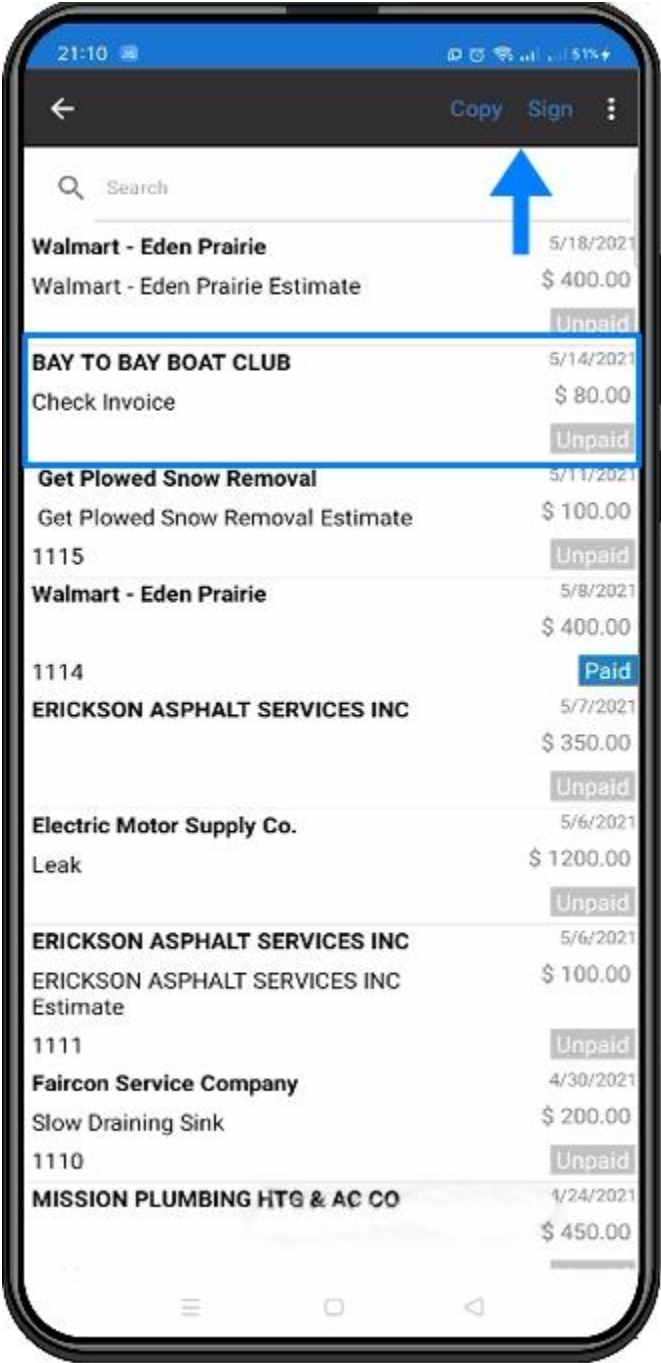
Sign – the estimate will open and the signature screen will pop out.

Mail – Send the estimate through email right away.

Delete– will remove the estimate.

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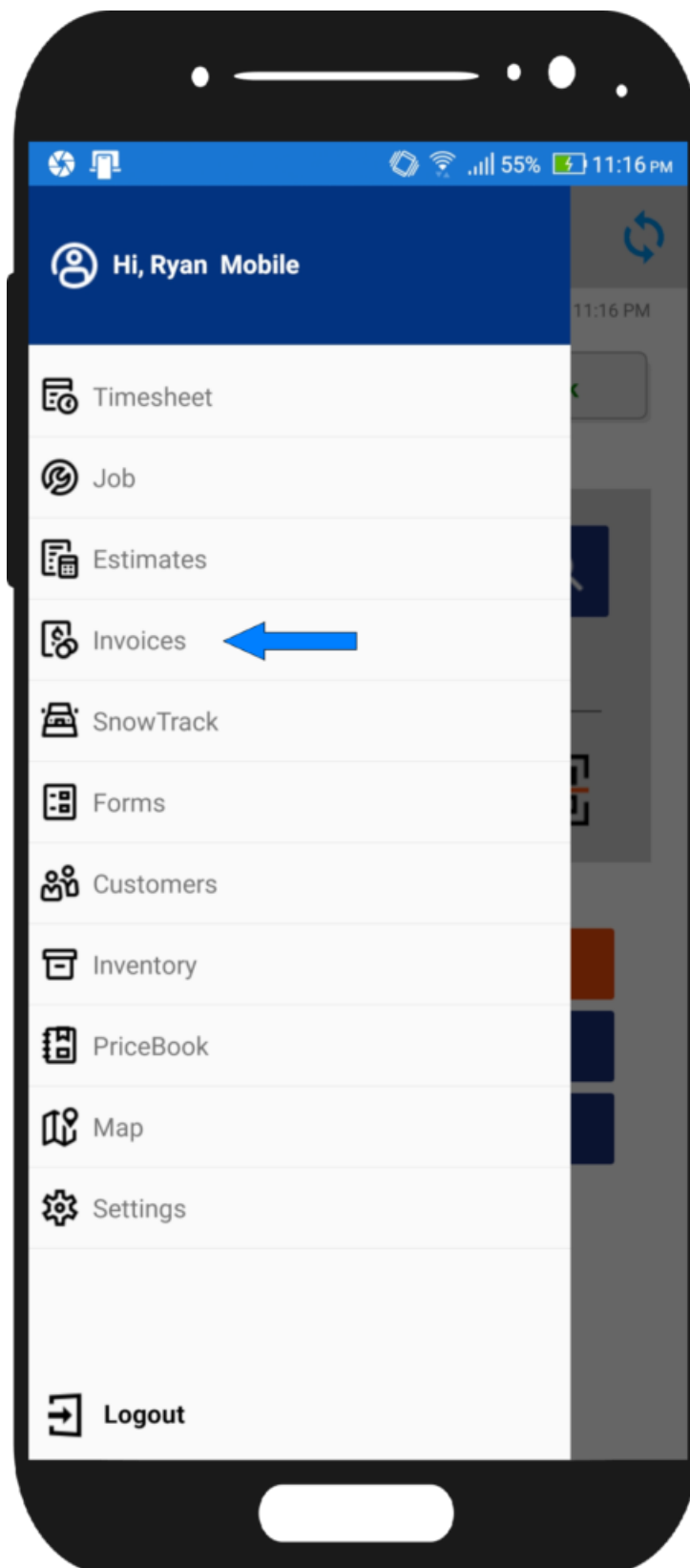
Go to **Invoices** by tapping into the three horizontal bars on the upper left. Look for Invoices.

You will notice that the Estimate that we have converted to invoice is now on the list of invoices.

Tap and hold the Invoice if you are using Android, swipe left on the estimate if you are using an iPhone. The new invoice can now be **edited**, **Copy** to a different customer, sent to **email**, **signed** and can be **deleted**.

https://support2.industrack.com/?lsvr_kba=mobile-estimates-convert-to-invoice
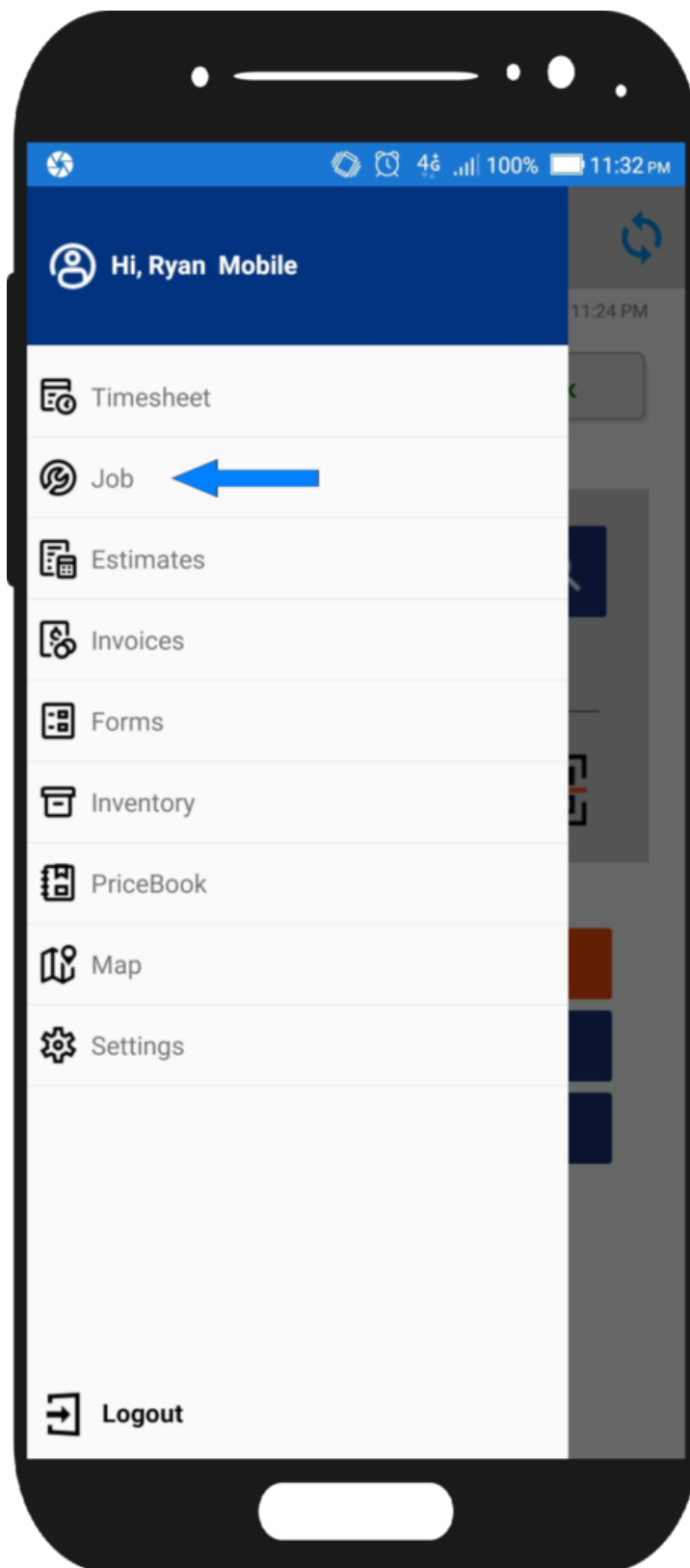
Converting Job to Invoice

You need to access **Job** through the settings dashboard by clicking the three horizontal bars on the upper left corner of the current page.
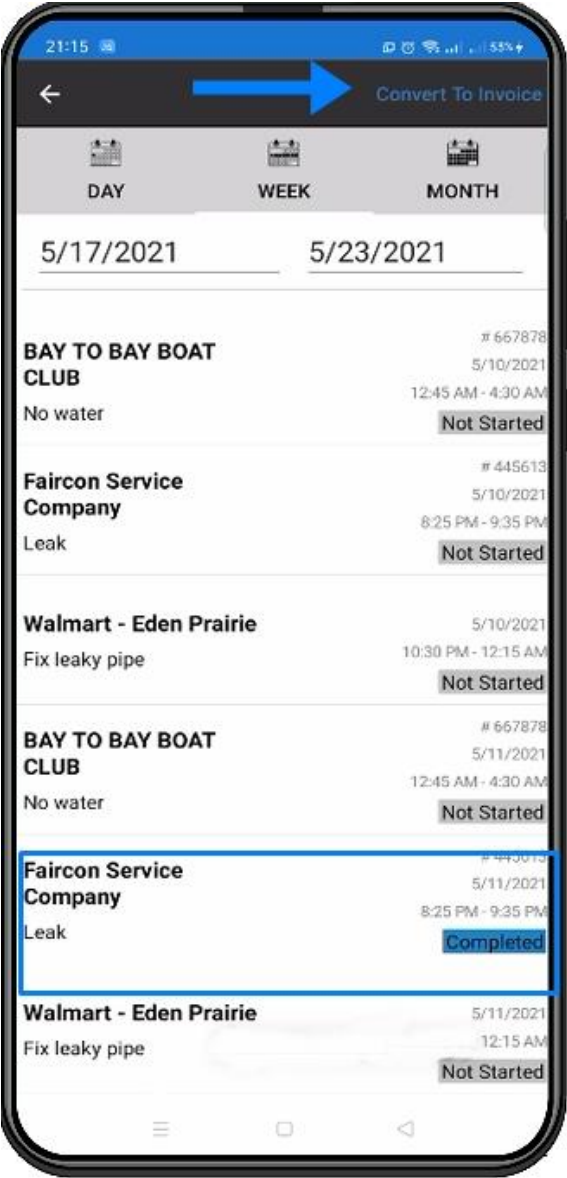
Once you get to the **Jobs Page**, look for a job on the list. Make sure that it has a **COMPLETED** status, it basically means that the Job has been done. Tap and hold the Job and a button with a black background will appear on top. Tap the **Convert To Invoice** and the preview of the invoice will be shown.
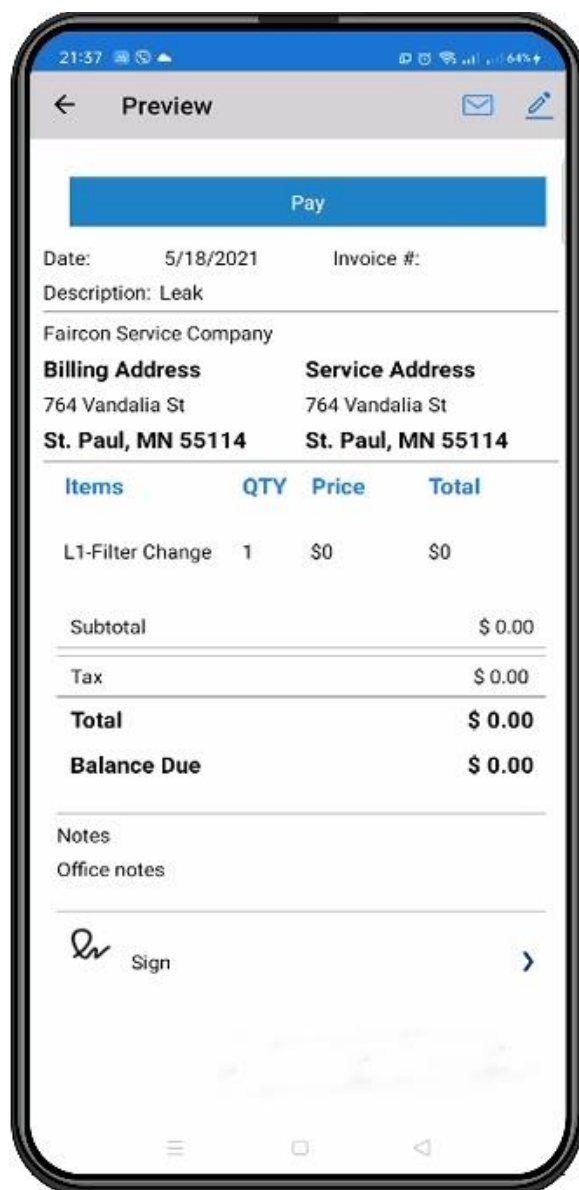
The preview of the invoice will appear. On this part you can have the customer **SIGN** the invoice, by tapping Sign at the bottom of your device.

You can also **EDIT** the invoice by tapping the pencil icon at the top right your screen.

The invoice can also be sent through email by tapping to the **Mail** icon next to the edit icon. A copy of the invoice will be sent in PDF format.

https://support2.industrack.com/?lsvr_kba=mobile-estimates-convert-to-invoice
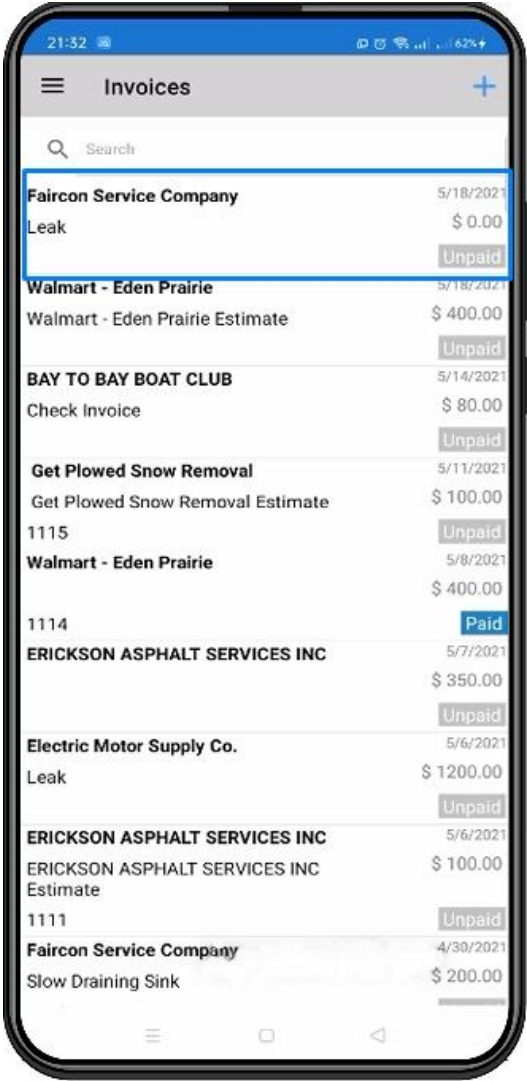
The invoice that we have created is now listed on the Invoices list. It can be edited, sent to email, signed and deleted.

To create a new invoice, tap **the + (plus)** button at the top right of the screen.