

# Convert Estimates

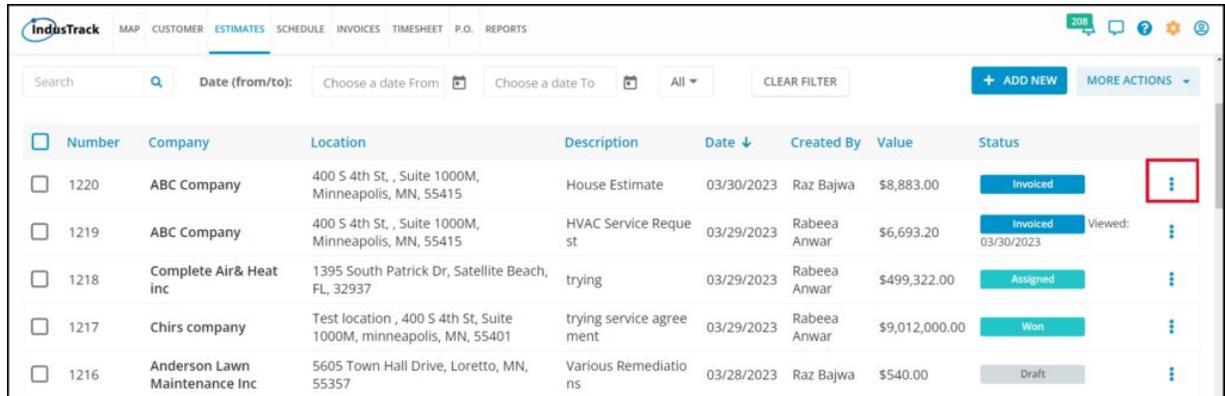
## Convert an Estimate to an Invoice

There are two ways to start the conversion process:

### 1. From the Estimate List:

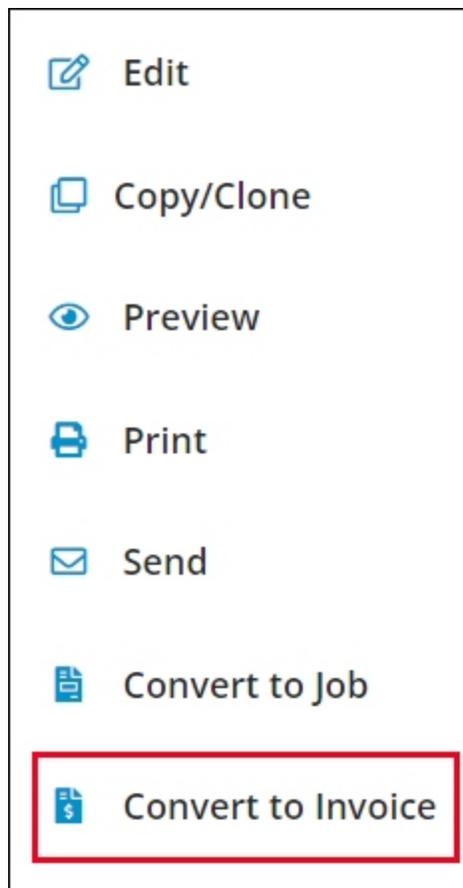
Locate the estimate in the Estimates Module

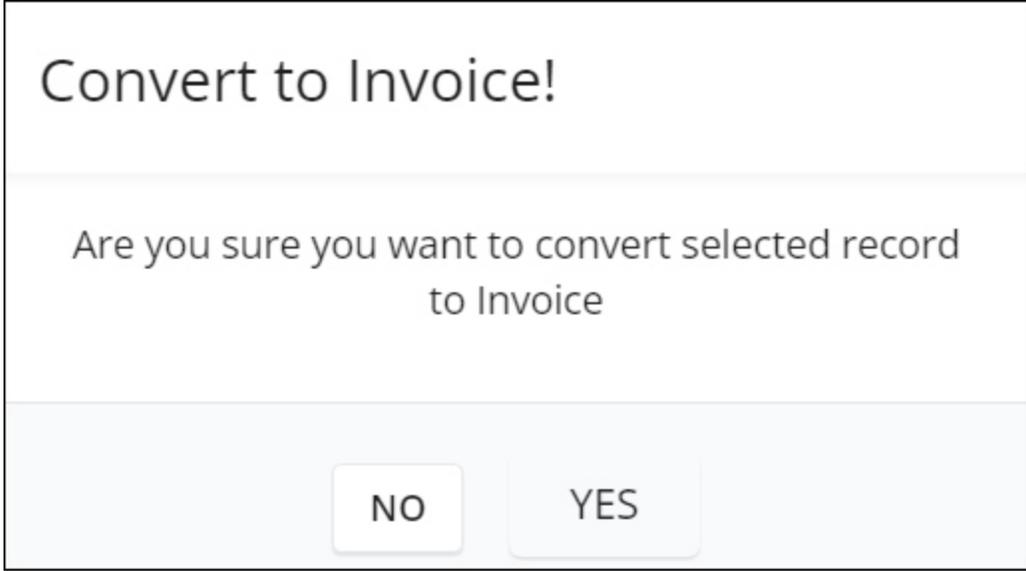
Click on the 3-dot menu to the right of the estimate



Number	Company	Location	Description	Date ↓	Created By	Value	Status	
1220	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	House Estimate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	⋮
1219	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	HVAC Service Request	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023	⋮
1218	Complete Air & Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937	trying	03/29/2023	Rabeea Anwar	\$499,322.00	Assigned	⋮
1217	Chirs company	Test location, 400 S 4th St, Suite 1000M, minneapolis, MN, 55401	trying service agreement	03/29/2023	Rabeea Anwar	\$9,012,000.00	Won	⋮
1216	Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357	Various Remediations	03/28/2023	Raz Bajwa	\$540.00	Draft	⋮

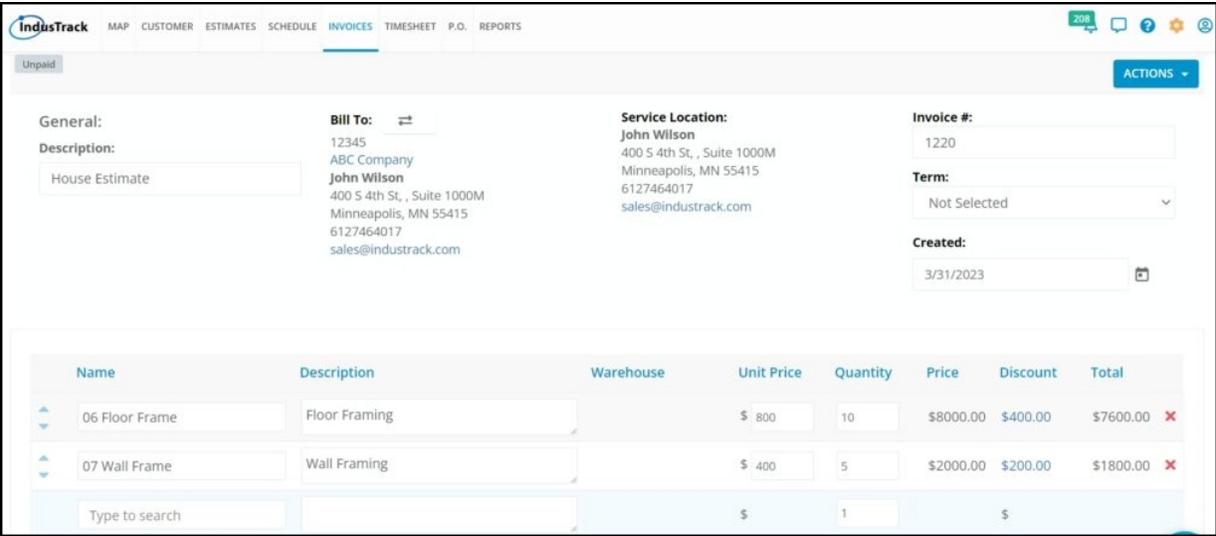
From the drop-down, select Convert to Invoice





The Invoice Module will open, and the Create an Invoice window will appear. Customer details and terms of payment from the estimate will be automatically added to the invoice.

The estimate's details, such as materials, services, labor, notes, taxes, and discounts, will be reflected as line items on the invoice.



Review and update the invoice details as needed, then click Save or Save and Close.

**ACTIONS** ▾

Save

Save and Close

Preview

Send to E-Mail

Print

Send Reminder

Receive Payment

Copy

Delete

Close

After saving the invoice, the estimate's status will be automatically updated to "Invoiced."

To view the invoice, go to the Invoices Module and find the new invoice in the Invoices List.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
04/03/2023	W1212121	W1212121		ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid
03/30/2023	1220	1220		ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415		\$8,883.00	\$8,883.00	Unpaid

The customer's Address Book will also be updated with the new invoice, and the estimate's status will be updated to "Invoiced."

## 2. From the Estimate Details Page:

Open the estimate in the Estimates Module

Go to the Actions button and select Convert to Invoice from the drop-down menu.

Estimation Number: 1216 Draft

**General:**

**Description:**  
Various Remediations

**Created:** 03/29/2023

**Proposal template:**  
jorji templateeee

**Estimation Summary:**

**Total Cost:** \$ 0.00  
**Total Price:** \$ 540.00  
**Profit:** Infinity %

**Bill To:**

14  
Anderson Lawn Maintenance Inc  
**Mike Anderson**  
5605 Town Hall Drive  
Loretto, MN 55357  
(763) 477-3320  
Mike@AndersonLawn.com

**Service Location:**

**Mike Anderson**  
5605 Town Hall Drive  
Loretto, MN 55357  
(763) 477-3320  
Mike@AndersonLawn.com

ACTIONS ▾

- Save
- Save and Close
- Preview
- Send to e-mail
- Convert to job
- Convert to Invoice
- Mark as Won
- Mark as Lost

## Convert an Estimate to a Job

There are two ways to convert an estimate to a job

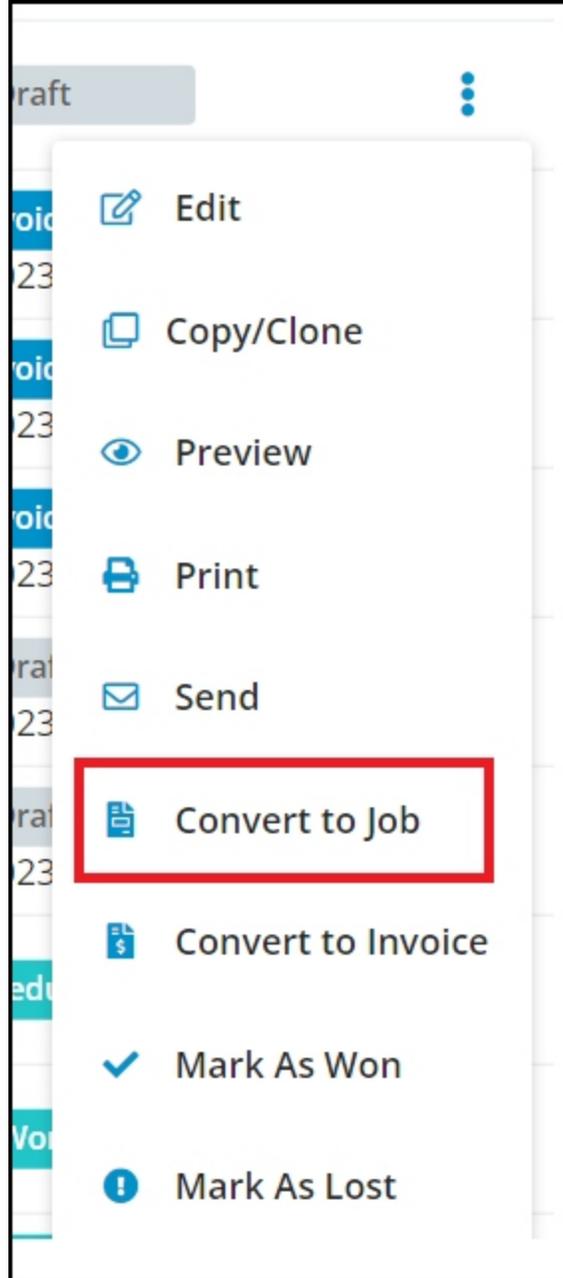
### 1. From The Estimate List:

Find the estimate you want to convert.

Click on the 3-dot menu to the right of the estimate.

<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created By	Value	Status	
<input type="checkbox"/>	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Service Request	03/29/2023	Rabeea Anwar	\$6,693.20	Won Viewed: 03/29/2023	⋮
<input type="checkbox"/>	1218	Complete Air& Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937	trying	03/29/2023	Rabeea Anwar	\$499,322.00	Assigned	⋮
<input type="checkbox"/>	1217	Chirs company	Test location , 400 S 4th St, Suite 1000M, minneapolis, MN, 55401	trying service agreement	03/29/2023	Rabeea Anwar	\$9,012,000.00	Won	⋮

Select "Convert to Job" from the drop-down.



A confirmation window will appear. Select Yes to continue or No to cancel the action.

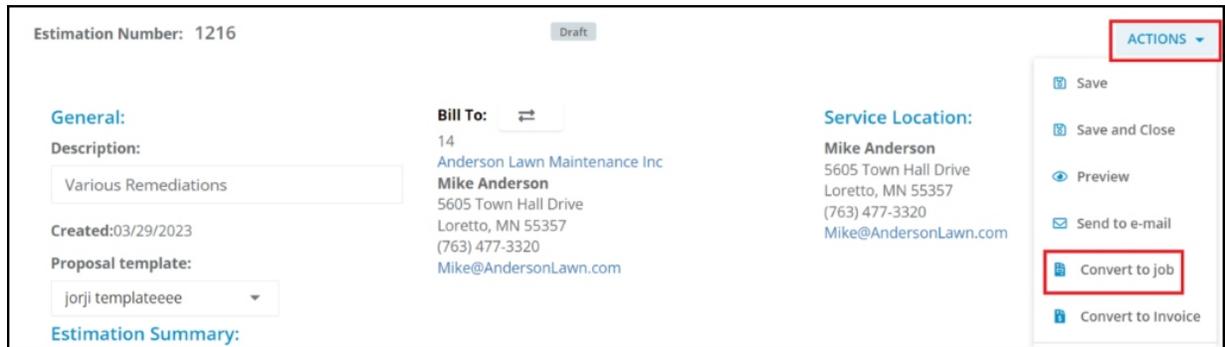


## 2. From Within the Estimate:

Open the estimate you want to convert.

Click on the “Actions” button.

Select “Convert to Job” from the drop-down.



The screenshot shows a software interface for an estimate. At the top left, it says "Estimation Number: 1216" and "Draft". The main content is divided into three columns: "General", "Bill To:", and "Service Location:". The "General" column contains a "Description:" field with "Various Remediations", a "Created:" date of "03/29/2023", and a "Proposal template:" dropdown menu set to "jorjl templateeee". The "Bill To:" column lists "14 Anderson Lawn Maintenance Inc" and "Mike Anderson" with address and contact information. The "Service Location:" column lists "Mike Anderson" with address and contact information. On the right side, there is an "ACTIONS" dropdown menu with options: "Save", "Save and Close", "Preview", "Send to e-mail", "Convert to job" (highlighted with a red box), and "Convert to Invoice".

You will be asked to confirm the conversion before proceeding. After confirming, the Schedule Module will open, and the Add New Job window will appear, allowing you to create the job from the converted estimate.