

## Customer Profile: Manage Estimates

Under the **Estimate** tab of the [Customer Profile](#), you will find the listing of all the **Estimates** that have been prepared for the customer.

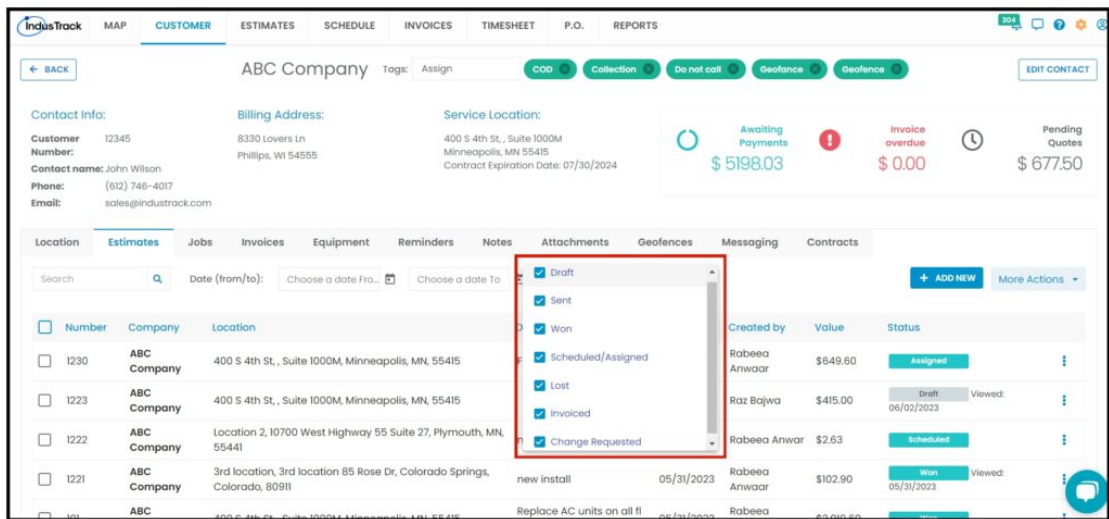
Aside from the customer details, the list includes the estimate number, the date when this was created and who prepared it, the total value, and its status. The status may either be draft (prepared but has not been forwarded to the customer) sent, won, lost, scheduled, or invoiced.

Go to the [Estimates module](#) for a detailed discussion of the **Estimates**. The process is the same whether the feature is accessed from the customer's profile or the Estimate module.

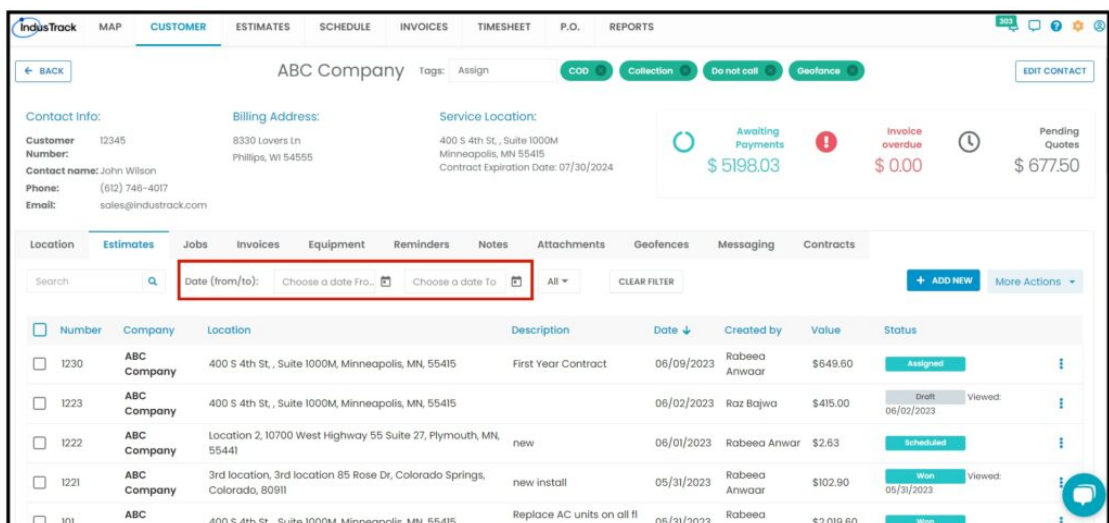
Number	Company	Location	Description	Date	Created by	Value	Status
1230	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	First Year Contract	06/09/2023	Rabeea Anwaar	\$649.60	Assigned
1223	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		06/02/2023	Raz Bajwa	\$415.00	Draft Viewed: 06/02/2023
1222	ABC Company	Location 2, 10700 West Highway 55 Suite 27, Plymouth, MN, 55441	new	06/01/2023	Rabeea Anwaar	\$2.63	Scheduled
1221	ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	new install	05/31/2023	Rabeea Anwaar	\$102.90	Won Viewed: 05/31/2023
101	ABC	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	Replace AC units on all fl	05/31/2023	Rabeea	\$2,019.60	Won

Search for a specific estimate by using the **Search box**. You can do a search using the Estimate number, service location, or estimate value.

Filter the listing according to the **Estimate status**.

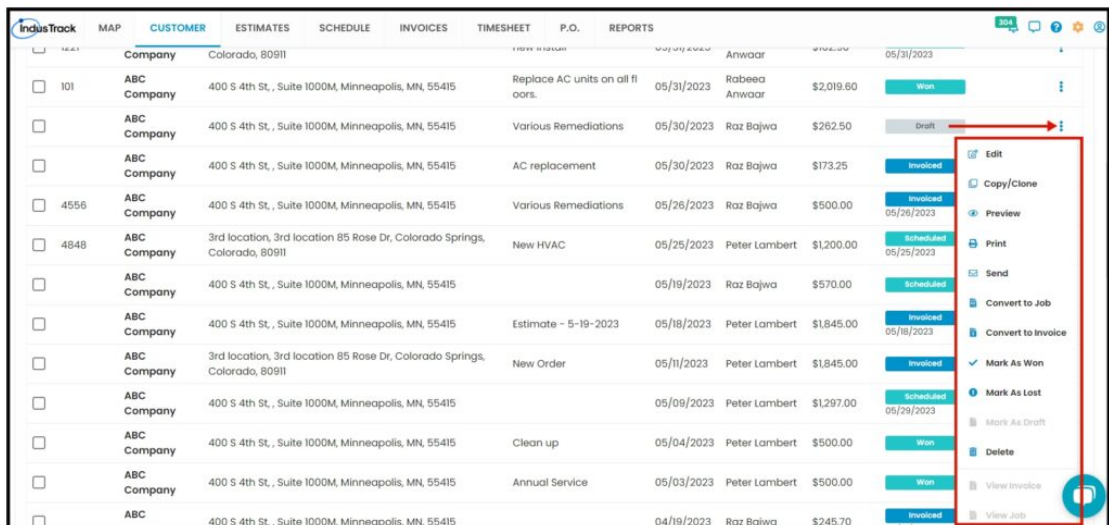


You can also select the **estimate dates or periods** that you want to view.



From here, you can also manage their estimates. This includes marking the estimate as Won or Lost, editing or deleting, saving, sending, and printing. The estimate for the customer can also be converted into a [job](#) or an [invoice](#) from this tab. This can be done by clicking the **3-dot menu** to the right of the estimate or the **More Actions** button for bulk updates.

If the estimate has been converted into a job or invoice, you can also view the associated job or invoice here as well by clicking on View Invoice and View Job options.



## Create an Estimate from the customer profile

[Create a new estimate](#) for the customer from here. Click the **Add New** button.

The screenshot shows the IndustTrack interface for a customer profile. The top navigation bar includes MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, P.O., and REPORTS. The customer name is ABC Company. The page is divided into sections for Contact Info, Billing Address, and Service Location. Financial summary shows Awaiting Payments of \$5198.03, Invoice overdue of \$0.00, and Pending Quotes of \$677.50. A red arrow points to the '+ ADD NEW' button in the 'Estimates' tab.

Number	Company	Location	Description	Date	Created by	Value	Status
1230	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	First Year Contract	06/09/2023	Rabeea Anwaar	\$649.60	Assigned
1223	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		06/02/2023	Raz Bajwa	\$415.00	Draft Viewed: 06/02/2023
1222	ABC Company	Location 2, 10700 West Highway 55 Suite 27, Plymouth, MN, 55441	new	06/01/2023	Rabeea Anwaar	\$2.63	Scheduled
1221	ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	new install	05/31/2023	Rabeea Anwaar	\$102.90	Won Viewed: 05/31/2023
101	ABC	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	Replace AC units on all fl	06/31/2023	Rabeea	\$2,019.60	Won

The **Adding New Estimation** window will come up. The page will also move to the **Estimates Module**.

Since the estimate is being prepared from the customer's page, the customer's name and location will already be given. If there is more than one service location, select the correct one.

The screenshot shows the 'Adding New Estimation' window. The 'Create New' dropdown is set to 'Estimate'. The 'Select Customer' dropdown shows 'ABC Company' with address '8330 Lovers Ln, Phillips, WI, 54555, USA'. The 'Service Locations' dropdown is open, showing three options: 'John Wilson' (400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA), '3rd location' (3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911, United States), and 'Location 2, Tori walker' (10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA). A red box highlights the 'Service Locations' dropdown.

At the upper left-hand corner of the window, select **Create New Estimate**.

This screenshot is identical to the previous one, showing the 'Adding New Estimation' window. In this version, a red box highlights the 'Estimate' option in the 'Create New' dropdown at the top left of the window.

Click **Proceed** and [complete the estimate.](#)

