Edit an Estimate

Locate the estimate you want to edit from the list.

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

Îndu	sTrack MAP	CUSTOMER ESTIMA	SCHEDULE INV	OICES TIMESHEET	P.O. REPORTS			208 <u>4</u> 🖵 😮 ⊄	9
	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Esti mate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023	

Select "Edit" from the drop-down list that appears.

ľ	Edit	
D	Copy/Clone	
٢	Preview	
₽	Print	
	Send	
	Convert to Job	
::L \$	Convert to Invoice	
~	Mark As Won	
0	Mark As Lost	
lì	Mark As Draft	
Ē	Delete	

Make any necessary updates to the estimate. Note that only draft and lost estimates can be edited, and that estimates that have been marked as won, converted to an invoice or a job, or scheduled cannot be edited.

Once you're done with the updates, click the "Save" button to save the changes. If you want to save and exit the estimate and go back to the estimate page, click the "Save and Close" button instead.

		ACTIONS	•				
6	Save						
6	Save a	and Close					
٢	Previe	ew					
	Send t	to e-mail					
Ë	Conve	Convert to job					
=Ľ \$	Conve	ert to Invoic	e				

The estimate will remain open, allowing you to continue working on it if needed.

Delete an Estimate

Deleting a Single Estimate:

Find the estimate you want to delete from the list

Indu	sTrack MA	P CUSTOMER ESTIMATES SCHE	DULE INVOICES TIMESHEET P.O. REPO	IRTS							208 <u>4</u> 🖵 🕜	\$
Searc	ch	Q Date (from/to):	Choose a date From 🖸 Ch	ioose a date 1	ro 🖻	All 👻	CLEA	R FILTER		+ ADD NEW	MORE ACTION	ons 🗸
	Number	Company	Location	De	escription		Date 🕹	Created By	Value	Status		
	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	н	ouse Estima	e	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced		÷
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	H' st	VAC Service	Reque	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced 03/30/2023	Viewed;	:
	1216	Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, N 55357	MN, Va S	arious Reme	diation	03/28/2023	Raz Bajwa	\$540.00	Draft		8
	1215	ABC Company	Location 2, 10700 West Highway Suite 27, Plymouth, MN, 55441	y 55 Va s	arious Reme	diation	03/28/2023	Raz Bajwa	\$427.11	Invoiced 03/28/2023	Viewed:	:
	1214	Electric Motor Supply Co.	4650 Main St. NE, Fridely, MN, 5	5421 te	rri		03/28/2023	Raz Bajwa	\$648.00	Invoiced 03/28/2023	Viewed:	:

Click on the estimate to open it.

Click on the Actions button and select Delete from the dropdown list.

ľ	Edit
D	Copy/Clone
۲	Preview
₽	Print
	Send
	Convert to Job
≡Ľ \$	Convert to Invoice
~	Mark As Won
0	Mark As Lost
lì	Mark As Draft
Ē	Delete

A Deleting Confirmation window will appear. Click Yes to confirm the delete action or No to cancel it.

Deleting Confirmation									
Are you	sure you want permane		ne record						
	CANCEL	YES							

The estimate will be removed from the list.

Deleting Multiple Estimates:

Tick the checkboxes to the left of the estimates you want to delete in the list.

	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Won Viewed: 03/29/2023	I
	1218	Complete Air& Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937	trying	03/29/2023	Rabeea Anwar	\$499,322.00	Assigned	I.
9	1217	Chirs company	Test location , 400 S 4th St, Suite 1000M, minneapolis, MN, 55401	trying servic e agreemen t	03/29/2023	Rabeea Anwar	\$9,012,000.00	Won	ł

Click on the More Actions button. Select Delete from the dropdown list.

W		MORE ACTIONS 🔻
	ம்	Mark as Won
1	Ģ	Mark as Lost
	Ō	Delete

1. Confirm the delete action.

Deleting Confirmation									
Are you sure you want to delete the record(s) permanently?									
CANCEL	YES								

All the selected estimates will be removed from the list.

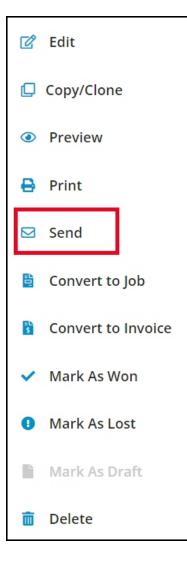
Send an Estimate

Find the estimate you want to send in the list.

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

Îndu	sTrack MAP	CUSTOMER ESTIMA	SCHEDULE INV	DICES TIMESHEET	P.O. REPORTS			208 🖓 🖓 🔇	• • •
	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Esti mate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	:
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023	÷

Select the Send option from the dropdown list



The Email Estimate window will appear.

Email Estimate	2	>
From:	development@industrack.com	
Recipients	s: sales@industrack.com	
Subject:	Estimate 1219 from IndusTrack Demo1	
Dear John	Wilson,	
Please revi	ew the attached estimate. Feel free to contact with any questions.	
To review t	the estimate online <u>click here</u> .	
We look for	rward to working with you.	
Thanks for IndusTrack	your consideration! c Demo1	
		CLOSE SEND

Click the Send button to process and send the estimate to the contact person's email address that is specified in their Address Book.

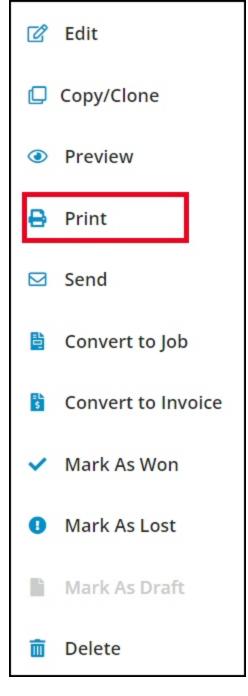
Print an Estimate

Find the estimate you want to print from the list.

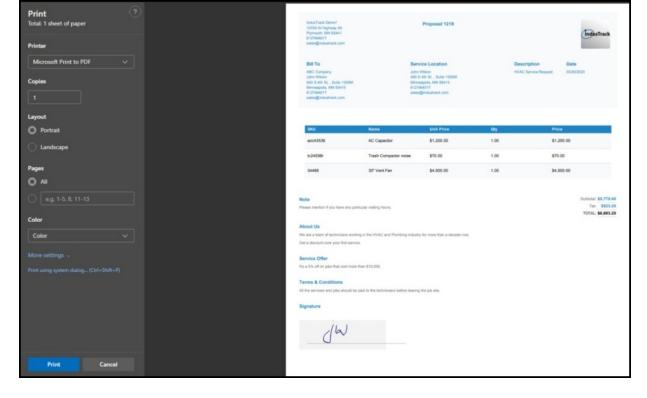
Click on the 3-dot menu located to the right of the estimate.

Indu	I sTrack MAR	P CUSTOMER ESTIMA	ATES SCHEDULE INV	OICES TIMESHEET	P.O. REPORTS			20 <u>3</u> 🖵 😮 🌣 🙁
	Number	Company	Location	Description	Date 🕹	Created By	Value	Status
	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Esti mate	03/30/2023	Raz Bajwa	\$8,883.00	
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023

Select the Print option from the dropdown list.



The Print Preview page will appear.



Set up the print settings, such as the printer to be used, paper size, color, and other preferences.

Print (2) Total: 1 sheet of paper Printer	រាល់នៅកំណង Danus1 10700 W Highway 58 Pigmapan, MM 55441 8122464017 នេះខែមើល្អី exclusion		Proposal 1218		Industrack
Microsoft Print to PDF V	Bill To ABC Company John Wilson 400 Birth 51, Suche 1000M Minosophis, Mit Setti 51278-9407 sales@industrack.com		Service Location Jahn Wilson Ido 5 44 81, Suite 1900M Mitmespole, NUE Biels 122746017 uiles@industrack.com		ription Date Service Request 03/05/0029
Layout					
O Portrait	19KU	Name	Unit Price	Oly	PMR 1
C Landscape	acc43536	AC Capacitor	\$1,200.00	1.00	\$1,200.00
	tc24598r	Trash Compactor noise	\$70.00	1.00	\$70.00
Pages	34466	30" Vent Fan	\$4,500.00	1.00	\$4,500.00
O All					
C e.g. 1-5, 8, 11-13	Note Pease mention if you have any parts	ular visiting hours.			Subtotal: 15.778.80 Tai: 5923.29 TOTAL: 56,653.29
	About Us				
Color 🗸	We are a team of technicians working		dustry for more than a decade now.		
	Get a discount over your first service.				
	Service Offer				
	It's a 5% off on jobs that cost more th	un \$10,000.			
	Terms & Conditions				
	All the services and jobs should be p	aid to the techniciaers before is	aving the job alte.		
	Signature				
	JW				
Print Cancel					

Once you have finished configuring the settings, click the Print button.

Print ? Total: 1 sheet of paper	Inductivacia Demot 10700 W Highway 58 Phymouth, MM 55441 812444017		Proposal 1219		Inglistrack
Printer	sales@industrack.com				
Microsoft Print to PDF V	Bill To ABC Company John Witten 400 8-411 5L, Turke 10004		Service Location John Wilson 400 S 4th St., Suite 1000ki Mitmespice, MN 85415		cription Date Service Request 00/25/023
1	Minneapola, MN 55415 0121454017 aalee@industrack.com		8122464017 salee@industrack.com		
Layout					
O Portrait	SHU-	Name	Unit Price	Oty	Price
-	acc+3536	AC Capacitor	\$1,200.00	1.00	\$1,200.00
C Landscape	tc24598r	Trash Compactor nois	e \$70.00	1.00	\$70.00
Pages	34466	30* Vent Fan	\$4,500.00	1.00	\$4,500.00
O AII					
eg. 1-5, 8, 11-13	Note Please mention if you have any part	cular visiting hours.			Subtotal: \$5,776.50 Tac: \$523.29 TOTAL: \$6,693.29
Color	About Us				
Color	We are a team of techniciane working	g in the HVAC and Pluntsing i	industry for more than a decade now.		
	Gat a discourt over your first service				
More settings 🐱	Service Offer				
Print using system dialog (Ctrl+Shift+P)	Its a 5% off on jobs that cost more t	han \$10,000.			
	Terms & Conditions				
	All the services and jobs should be p	paid to the techniciaes before i	insering the job site.		
	Signature				
	JW				
Print Cancel					

The estimate will start to print according to the settings you have specified

Mark an Estimate as Won

Marking a single estimate as won:

Locate the estimate that has been accepted and approved by the customer.

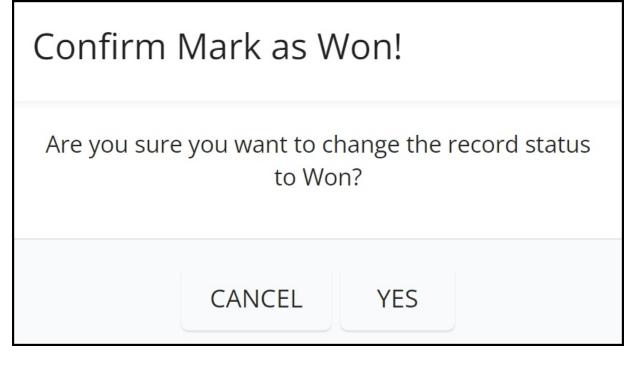
Click on the three-dot menu on the right-hand side of the estimate.

Îndu	IsTrack MAP	CUSTOMER ESTIMA	SCHEDULE INV	DICES TIMESHEET	P.O. REPORTS			208 💭 😯 🌣	8
	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Esti mate	03/30/2023	Raz Bajwa	\$8,883.00		
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023	

Select the "Mark as Won" option from the drop-down list.



Confirm the action by clicking "Yes" or cancel it by clicking "No".



The estimate's status will be updated to "Won".

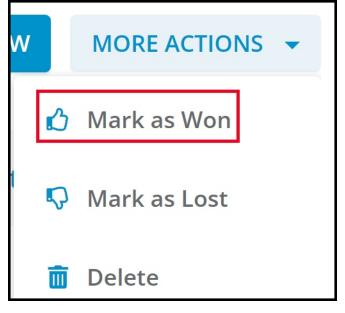
Marking multiple estimates as won:

Tick the checkboxes to the left of the estimates that have been accepted and approved.

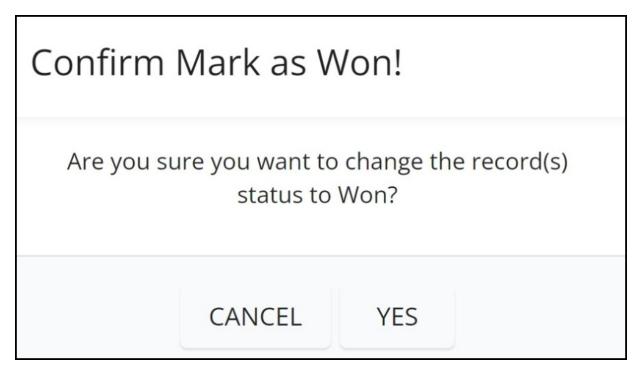
	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Won Viewed: 03/29/2023	I
•	1218	Complete Air& Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937	trying	03/29/2023	Rabeea Anwar	\$499,322.00	Assigned	I
	1217	Chirs company	Test location , 400 S 4th St, Suite 1000M, minneapolis, MN, 55401	trying servic e agreemen t	03/29/2023	Rabeea Anwar	\$9,012,000.00	Won	:

Click on the "More Actions" button.

Select the "Mark as Won" option from the drop-down list.



Confirm the action.



The statuses of all the selected estimates will be updated to "Won".

Mark an Estimate as Lost

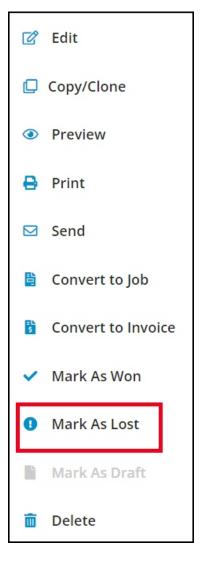
Marking a single estimate as lost:

Locate the estimate that has been disapproved or declined by the customer.

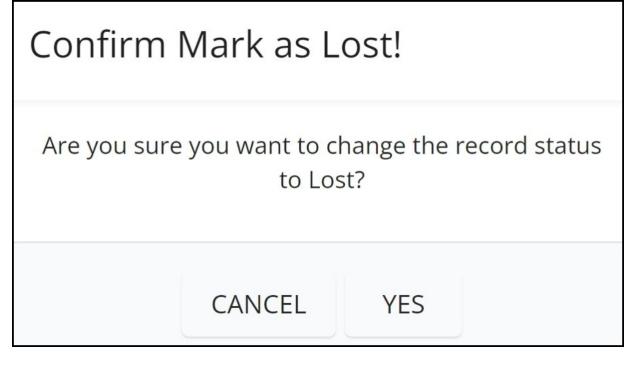
Click on the three-dot menu on the right-hand side of the estimate.

İndu	sTrack MAR	CUSTOMER ESTIMA	ATES SCHEDULE INV	OICES TIMESHEET	P.O. REPORTS			208 🖓 🖓 🔇	\$ @
	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Esti mate	03/30/2023	Raz Bajwa	\$8,883.00		:
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023	:

Select the "Mark as Lost" option from the drop-down list.



Confirm the action by clicking "Yes" or cancel it by clicking "No".



The estimate's status will be updated to "Lost".

Marking multiple estimates as lost:

Tick the checkboxes to the left of the estimates that have been disapproved or declined.

	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
1	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Won Viewed: 03/29/2023	:
1	1218	Complete Air& Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937	trying	03/29/2023	Rabeea Anwar	\$499,322.00	Assigned	I
2	1217	Chirs company	Test location , 400 S 4th St, Suite 1000M, minneapolis, MN, 55401	trying servic e agreemen t	03/29/2023	Rabeea Anwar	\$9,012,000.00	Won	÷

Click on the "More Actions" button.

Select the "Mark as Lost" option from the drop-down list.



Confirm the action.

Confirm Mark as Lost!
Are you sure you want to change the record(s) status to Lost?
CANCEL YES

The statuses of all the selected estimates will be updated to "Lost".

The option to mark an estimate as lost can also be accessed with the estimate open. Go to the Actions tab and select "Mark as Lost" from the drop-down list.

Preview and Create a PDF of an Estimate

Previewing an estimate:

Click on the three-dot menu on the right-hand side of the estimate.

Indu	sTrack MAR	CUSTOMER ESTIMA	SCHEDULE IN	NVOICES TIMESHEET	P.O. REPORTS			208 🖵 🖓	\$
	Number	Company	Location	Description	Date 🕹	Created By	Value	Status	
	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Esti mate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	:
	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Servic e Request	03/29/2023	Rabeea Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023	:

Select "Preview" from the drop-down list.



The Estimate Preview page will be displayed.

03/27	7/2023
03/21	7/2023
03/27	7/2023
03/27	7/2023
-	
Prop	iosal 248
n 123	
	n 123

Creating a PDF copy:

On the Estimate Preview page, click the "Save as PDF" button at the upper right-hand corner of the estimate.

imate Preview			
		8	SAVE AS PDF
InglusTrack	Date	03/27/2023	
	Description	Proposal 248	
10700 W Highway 55 Plymouth, MN fligh 6124296636 sales@industrack.com <u>EIII To</u> ??? ??? (468) ??? ??? (468) 13001-13055 Nicollet Avenue			
Burnsville, MN Service Location 222 222 (468) 13001-13055 Nicollet Avenue Burnsville, MN			
			5105
			CLOSE

A PDF file of the estimate will be downloaded to your computer.

Open the downloaded PDF file to view it, or save it in your computer folder.

If the estimate looks good, you can send it to the customer or print a copy. These options are available at the "Actions" button.

If there is something you want to change, you can go back and edit the estimate before sending or printing it.

Please refer to the article below for instructions on how to convert Estimates into Invoices and Jobs: Convert Estimates – IndusTrack Support