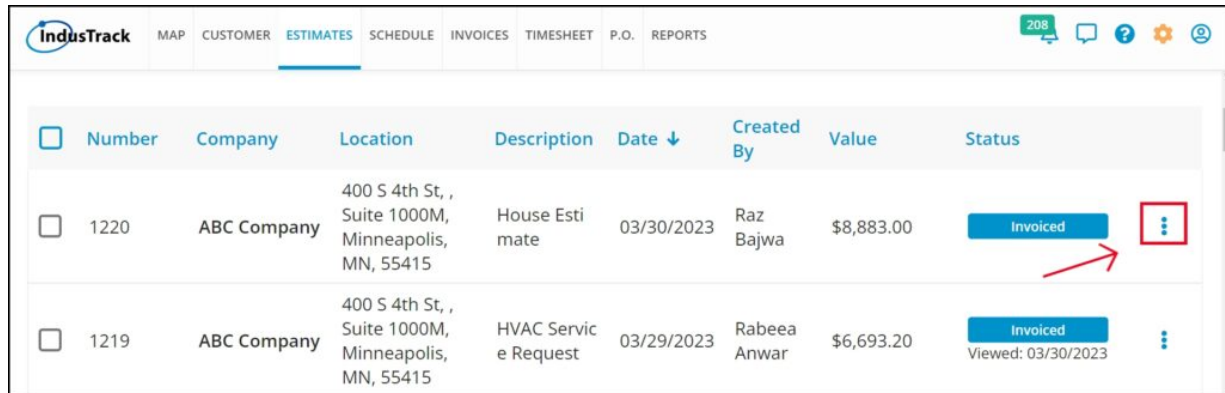


Manage Estimates

Edit an Estimate

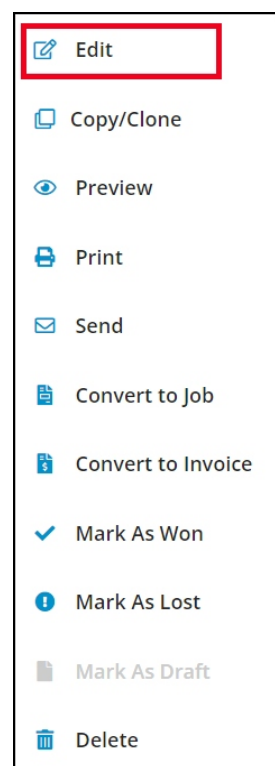











Locate the estimate you want to edit from the list.

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



<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created By	Value	Status
<input type="checkbox"/>	1220	ABC Company	400 S 4th St , Suite 1000M, Minneapolis, MN, 55415	House Estimate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced
<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	Invoiced Viewed: 03/30/2023

Select “Edit” from the drop-down list that appears.

- 
-  Edit
 -  Copy/Clone
 -  Preview
 -  Print
 -  Send
 -  Convert to Job
 -  Convert to Invoice
 -  Mark As Won
 -  Mark As Lost
 -  Mark As Draft
 -  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 ▼



Save



Save and Close



Preview



Send to e-mail



Convert to job



Convert to Invoice

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


IndusTrack									
MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS									
208									
Search									
Date (from/to): Choose a date From Choose a date To All CLEAR FILTER									
+ ADD NEW MORE ACTIONS									
<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created By	Value	Status	
<input type="checkbox"/>	1220	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	House Estimate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	⋮
<input type="checkbox"/>	1219	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	HVAC Service Request	03/29/2023	Rabeya Anwar	\$6,693.20	Invoiced Viewed: 03/30/2023	⋮
<input type="checkbox"/>	1216	Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357	Various Remediations	03/28/2023	Raz Bajwa	\$540.00	Draft	⋮
<input type="checkbox"/>	1215	ABC Company	Location 2, 10700 West Highway 55 Suite 27, Plymouth, MN, 55441	Various Remediations	03/28/2023	Raz Bajwa	\$427.11	Invoiced Viewed: 03/28/2023	⋮
<input type="checkbox"/>	1214	Electric Motor Supply Co.	4650 Main St. NE, Fridley, MN, 55421	terri	03/28/2023	Raz Bajwa	\$648.00	Invoiced Viewed: 03/28/2023	⋮


Click on the estimate to open it.


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


 Edit


 Copy/Clone


 Preview


 Print


 Send


 Convert to Job

 Convert to Invoice

 Mark As Won

 Mark As Lost

 Mark As Draft

 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 to delete the record permanently?

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
<input checked="" 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 checked="" 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 checked="" 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

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

W

MORE ACTIONS

Mark as Won

Mark as Lost

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.


IndusTrack


MAPCUSTOMERESTIMATESCHEDULEINVOICESTIMESHEETP.O.REPORTS


208


<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created By	Value	Status	
<input type="checkbox"/>	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Esti mate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	<div></div>
<input type="checkbox"/>	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	<div></div>


Select the Send option from the dropdown list


-  Edit


 Copy/Clone


 Preview


 Print


 Send


 Convert to Job

 Convert to Invoice

 Mark As Won

 Mark As Lost

 Mark As Draft

 Delete

The Email Estimate window will appear.

Email Estimate

From:

development@industrack.com

Recipients:

sales@industrack.com

Subject:

Estimate 1219 from IndusTrack Demo1

Dear John Wilson,

Please review the attached estimate. Feel free to contact with any questions.

To review the estimate online [click here](#).

We look forward to working with you.

Thanks for your consideration!

IndusTrack 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.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

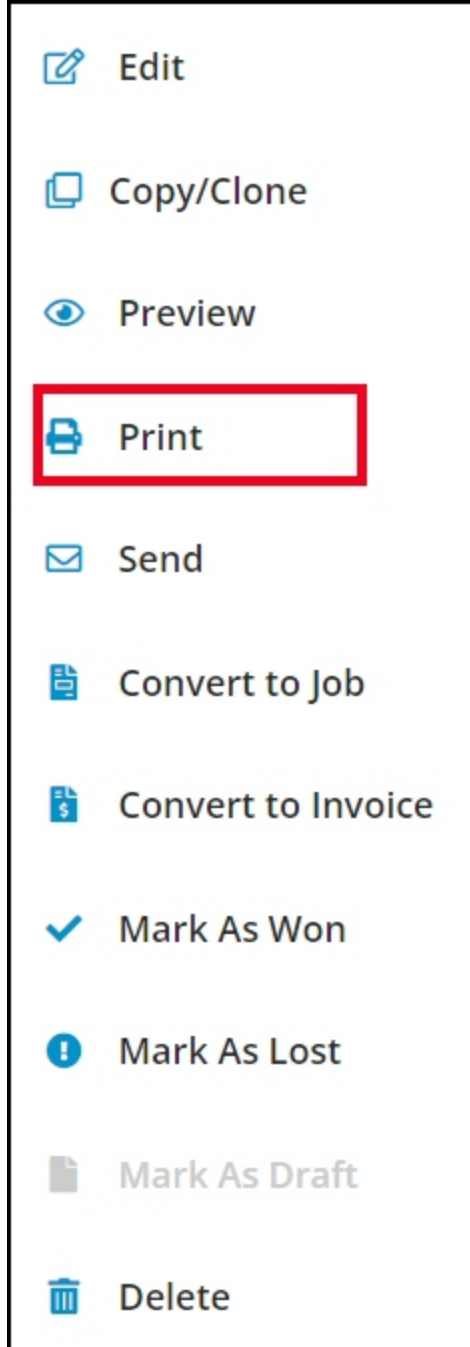
P.O.

REPORTS

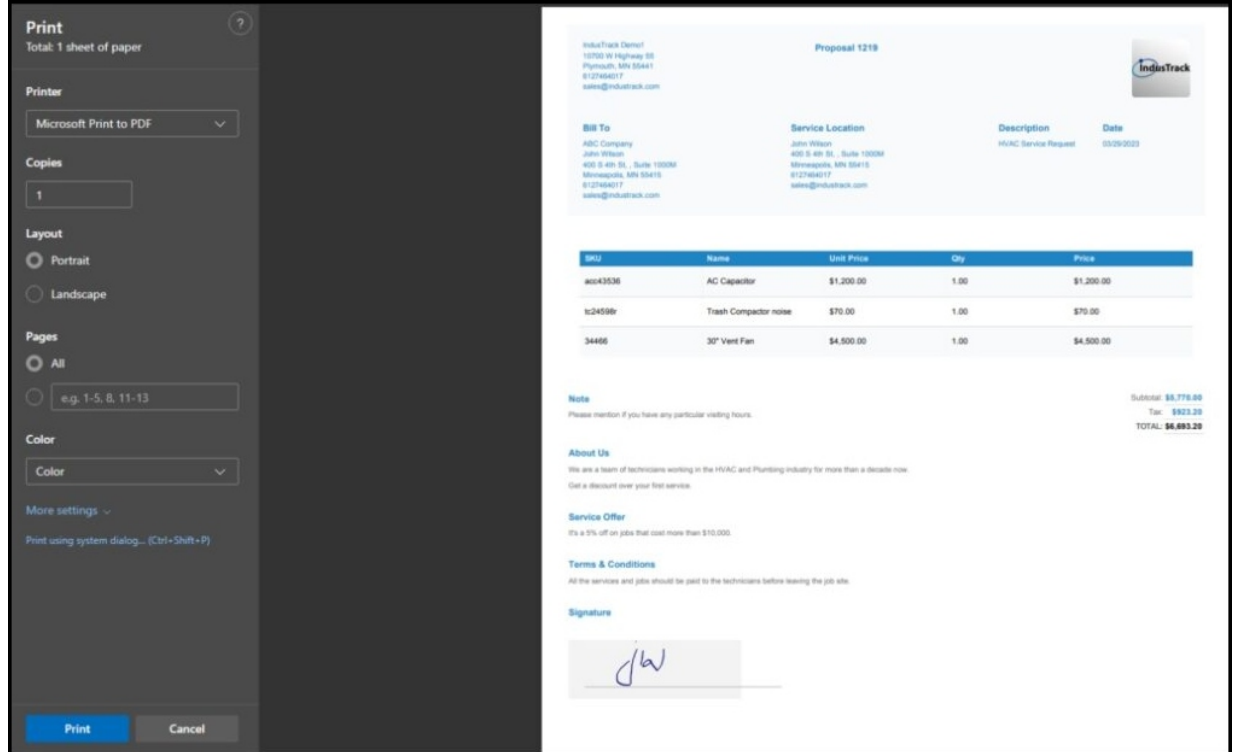
208

<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created By	Value	Status	
<input type="checkbox"/>	1220	ABC Company	400 S 4th St , Suite 1000M, Minneapolis, MN, 55415	House Estimate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	⋮
<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	Invoiced Viewed: 03/30/2023	⋮

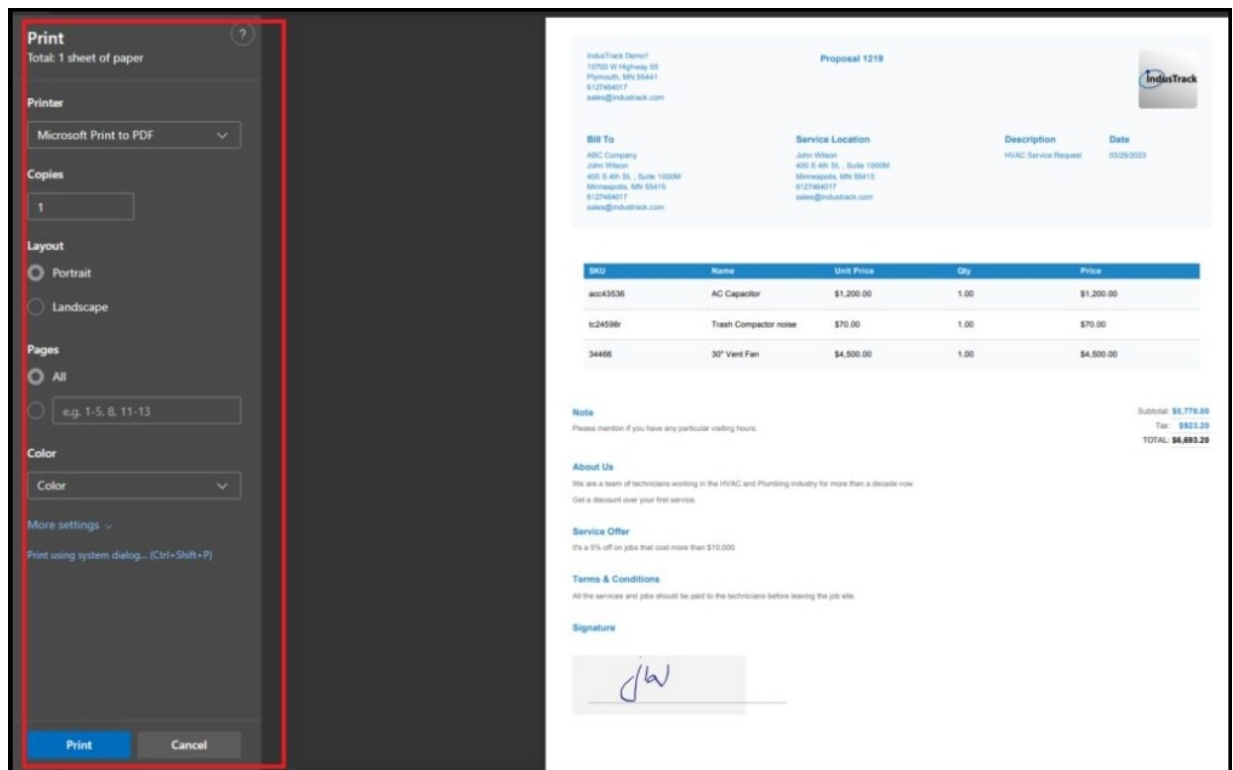
Select the Print option from the dropdown list.



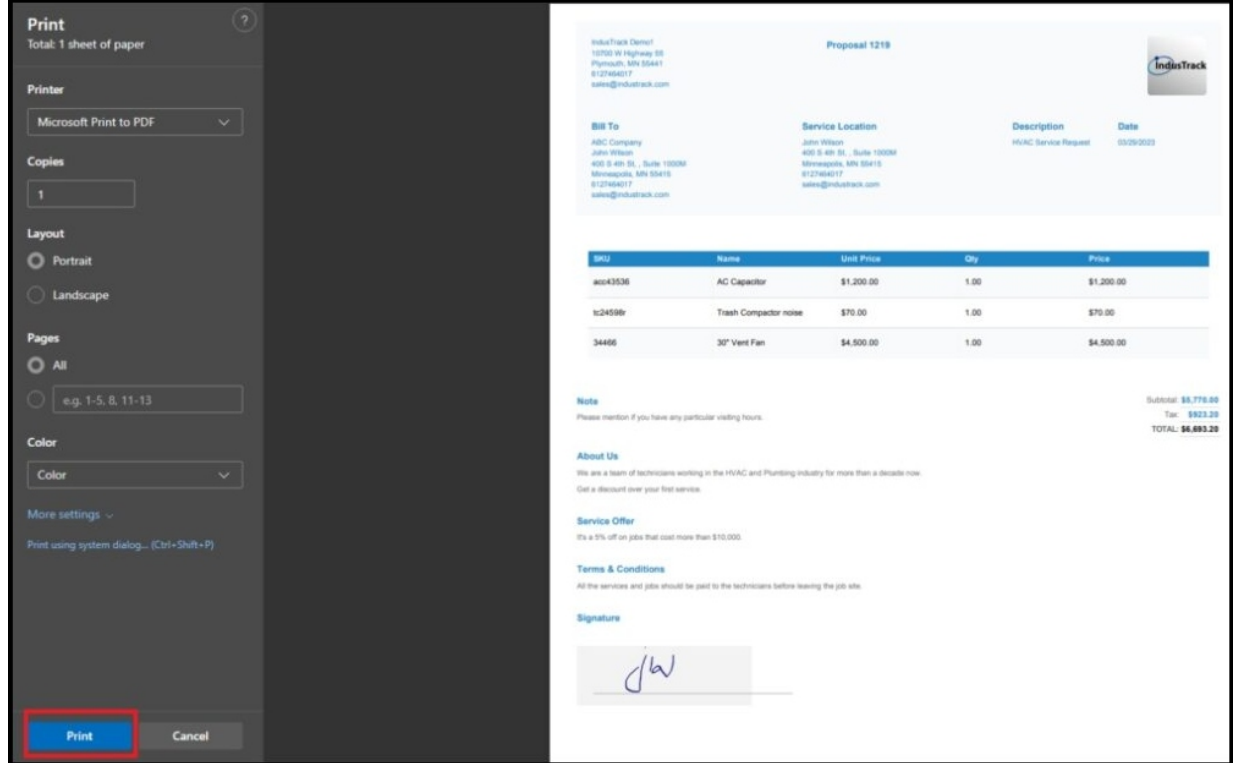
The Print Preview page will appear.



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



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



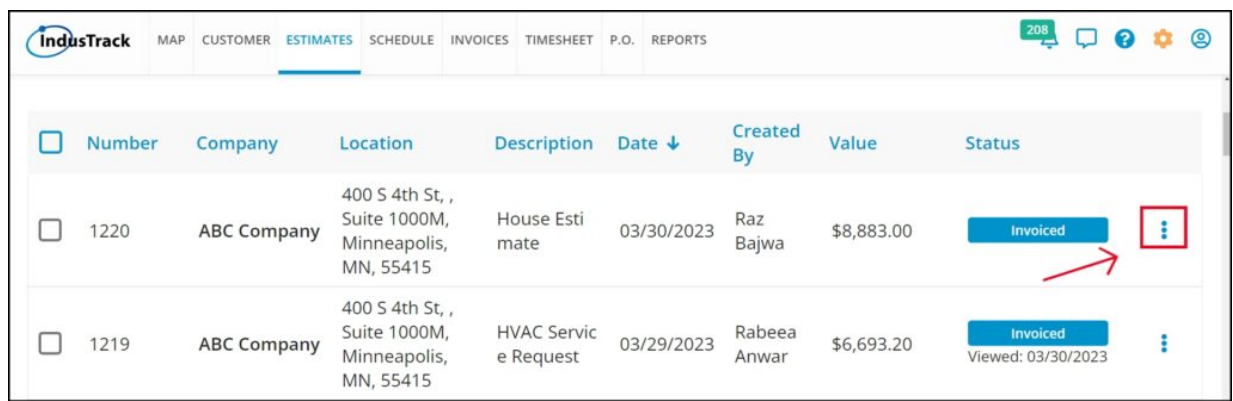
The estimate will start to print according to the settings you have specified

Mark an Estimate as Won

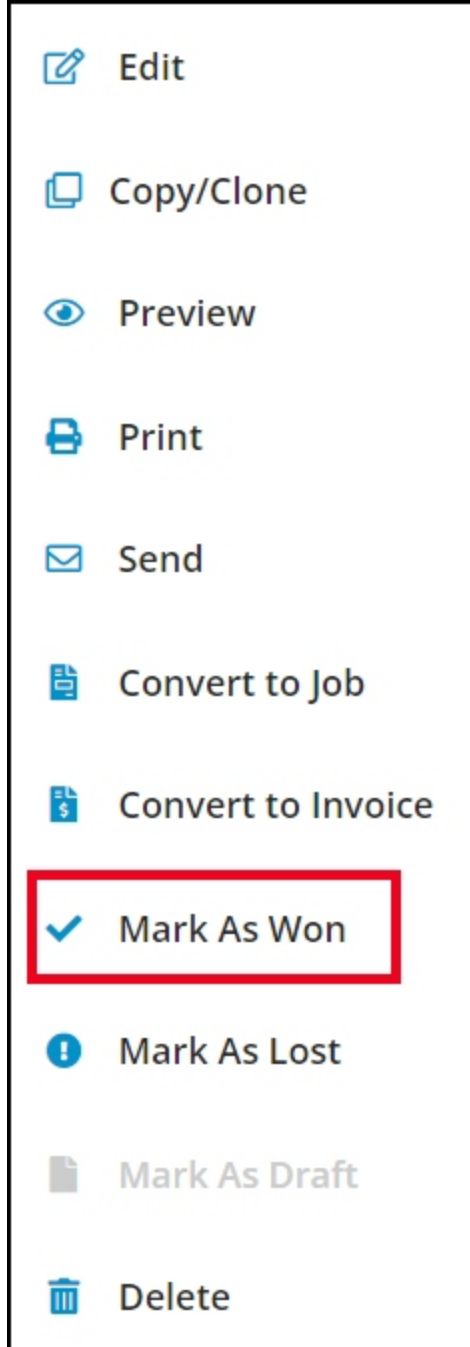
Marking a single estimate as won:

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.



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



Confirm the action by clicking “Yes” or cancel it by clicking “No”.

Confirm Mark as Won!

Are you sure you want to change the record status to Won?

CANCEL

YES

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	
<input checked="" 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 checked="" 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 checked="" 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	

Click on the "More Actions" button.

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

W

MORE ACTIONS

Mark as Won

Mark as Lost

Delete

Confirm the action.

Confirm Mark as Won!

Are you sure you want to change the record(s)
status to Won?

CANCEL

YES



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.

IndusTrack									
MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS									
<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created By	Value	Status	
<input type="checkbox"/>	1220	ABC Company	400 S 4th St , Suite 1000M, Minneapolis, MN, 55415	House Estimate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced	
<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	Invoiced Viewed: 03/30/2023	

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

-  Edit
-  Copy/Clone
-  Preview
-  Print
-  Send
-  Convert to Job
-  Convert to Invoice
-  Mark As Won
-  Mark As Lost
-  Mark As Draft
-  Delete

Confirm the action by clicking “Yes” or cancel it by clicking “No”.

Confirm Mark as Lost!

Are you sure you want to change the record status to Lost?

CANCEL

YES

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

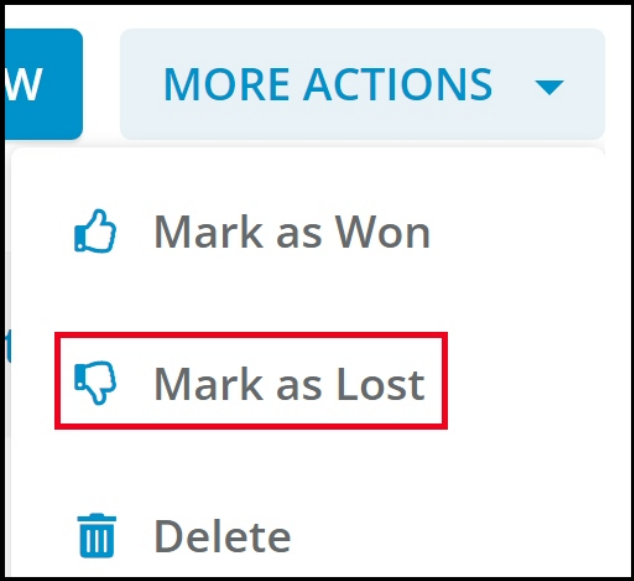
Marking multiple estimates as lost:

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

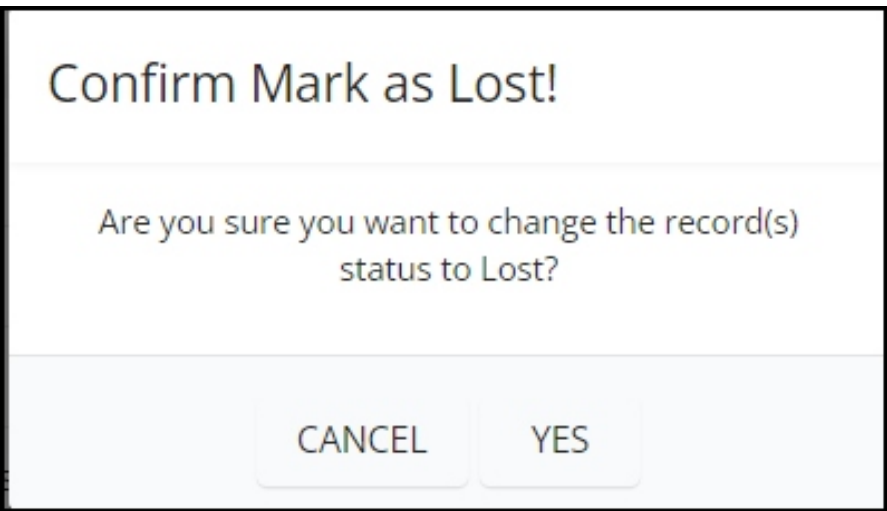
	Number	Company	Location	Description	Date ↓	Created By	Value	Status	
<input checked="" type="checkbox"/>	1219	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	HVAC Service Request	03/29/2023	Rabeea Anwar	\$6,693.20	Won Viewed: 03/29/2023	
<input checked="" type="checkbox"/>	1218	Complete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

Click on the "More Actions" button.

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



Confirm the action.



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.

IndusTrack								
MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS								
<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created By	Value	Status
<input type="checkbox"/>	1220	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	House Estimate	03/30/2023	Raz Bajwa	\$8,883.00	Invoiced
<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	Invoiced Viewed: 03/30/2023

Select "Preview" from the drop-down list.

Edit

Copy/Clone

Preview

Print

Send

Convert to Job

Convert to Invoice

Mark As Won

Mark As Lost


Mark As Draft

Delete

The Estimate Preview page will be displayed.

Estimate Preview

SAVE AS PDF



IndusTrack Employees
10700 W Highway 55
Plymouth, MN 55441
6124296636
sales@industrack.com

Date	03/27/2023
Number	Proposal 248
Description	123

Bill To

??? ??? (468)
??? ??? (468)
13001-13055 Nicollet Avenue
Burnsville, MN

Service Location

??? ??? (468)
13001-13055 Nicollet Avenue
Burnsville, MN


CLOSE

Creating a PDF copy:

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

Estimate Preview

SAVE AS PDF



IndusTrack Employees
10700 W Highway 55
Plymouth, MN 55441
6124296636
sales@industrack.com

Date	03/27/2023
Number	Proposal 248
Description	123

Bill To

??? ??? (468)
??? ??? (468)
13001-13055 Nicollet Avenue
Burnsville, MN

Service Location

??? ??? (468)
13001-13055 Nicollet Avenue
Burnsville, MN

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](#)

