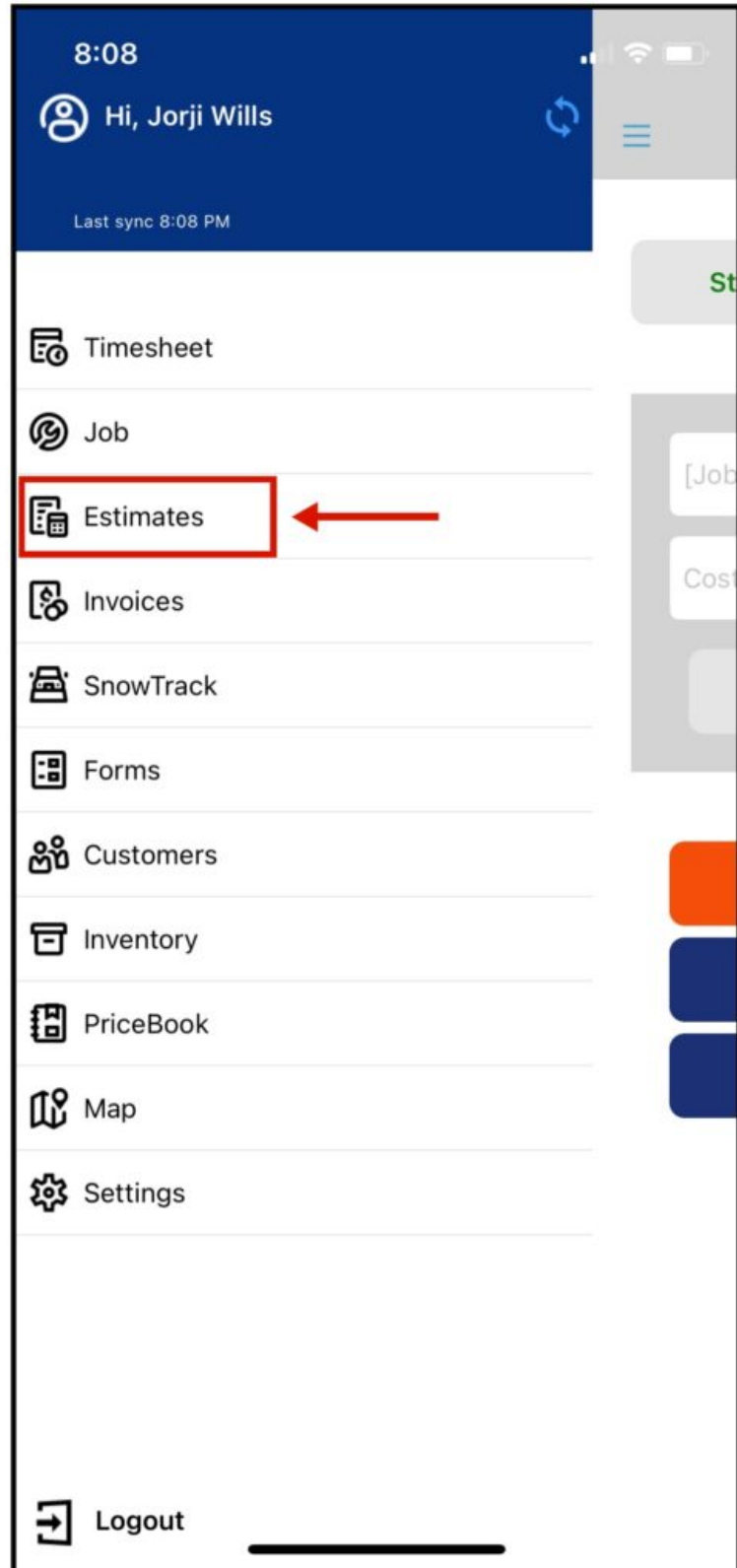
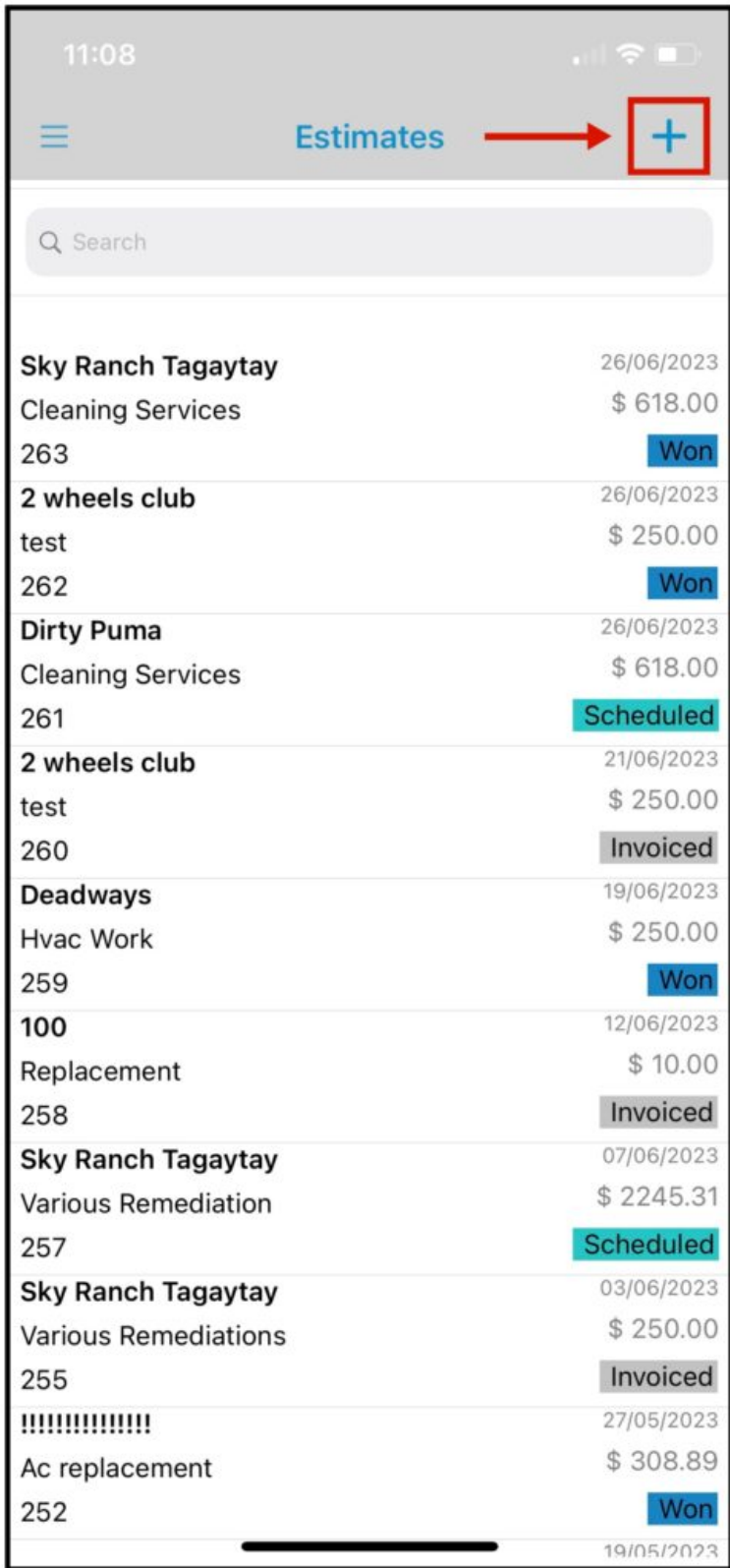


Mobile Estimates

How to access Estimates

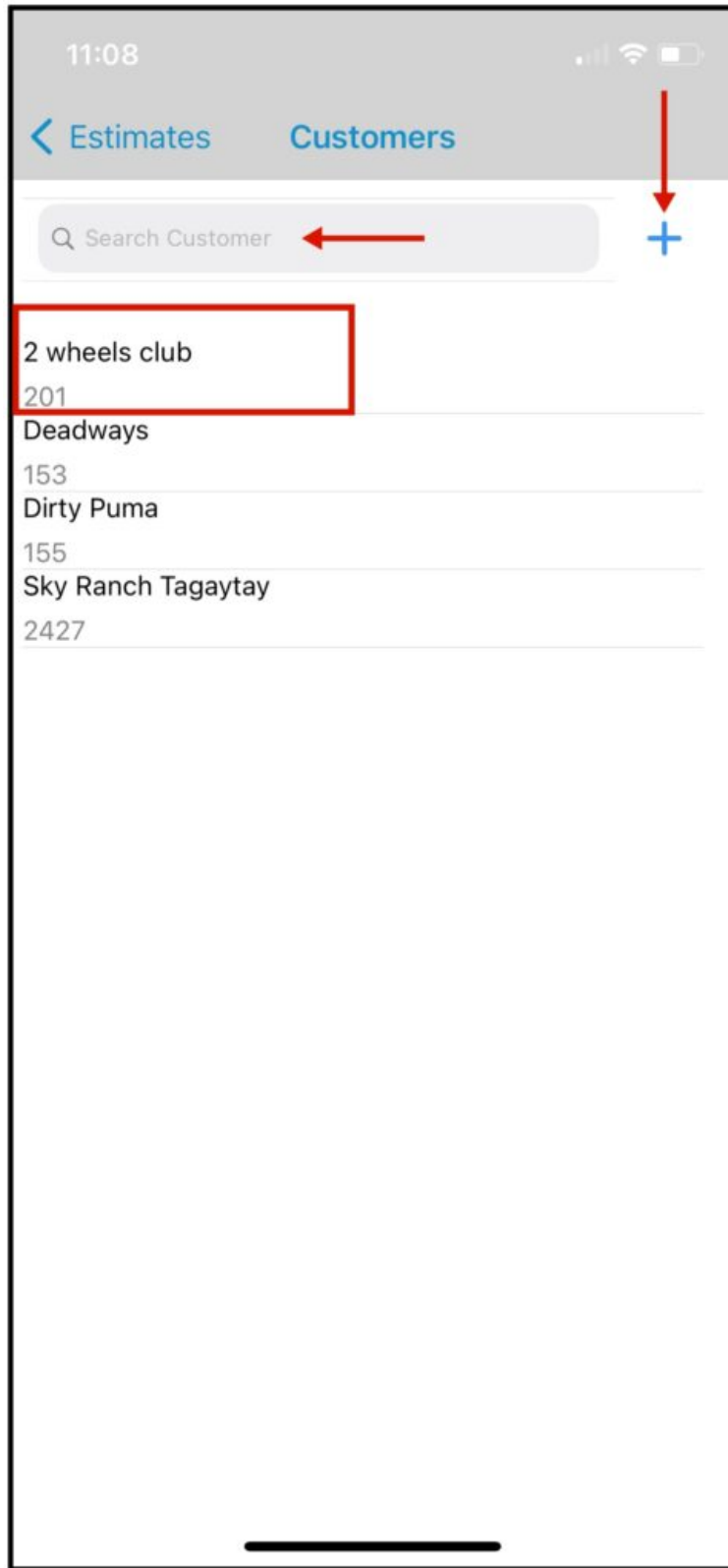
To Access the Mobile estimates section, click the three horizontal bars on the upper left and select **Estimates**.





Adding Estimates

Once you get to the Estimates Page, you will find a list of all the available estimates and their status. To add new estimates, tap on the **Add / + (plus)** button at the top right of the screen.



After tapping the **+** or **Add**, you will be directed to a list of existing customers. Select the existing customer from the list or use the search bar.

If you are creating an estimate for a new customer, tap on the plus icon to create a new customer.

11:08



< Estimates Select Location

Default Service Location:
40915 45th Hwy S, Hamilton, MS, 39746,

arizona
248 N Leandro Cir, Mesa, AZ, 5207,

New York
5 Frost Pond Rd, New Hyde Park, NY, 11040,

After selecting a customer, **if the customer has multiple service locations it will redirect you to the list of all service locations.** Select one and it will proceed.



11:09



< Back

Create New Estimate



Description

AC Replacement

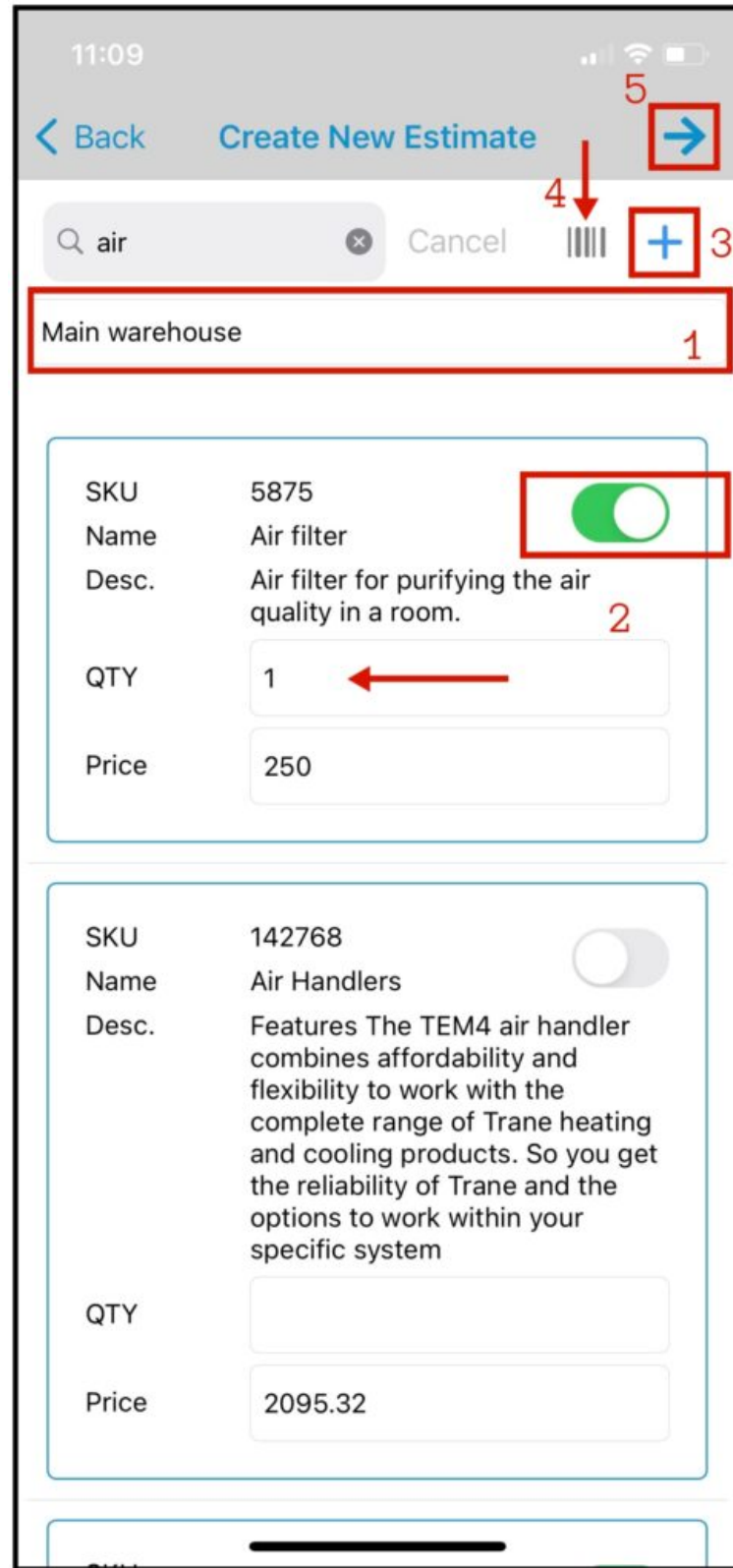


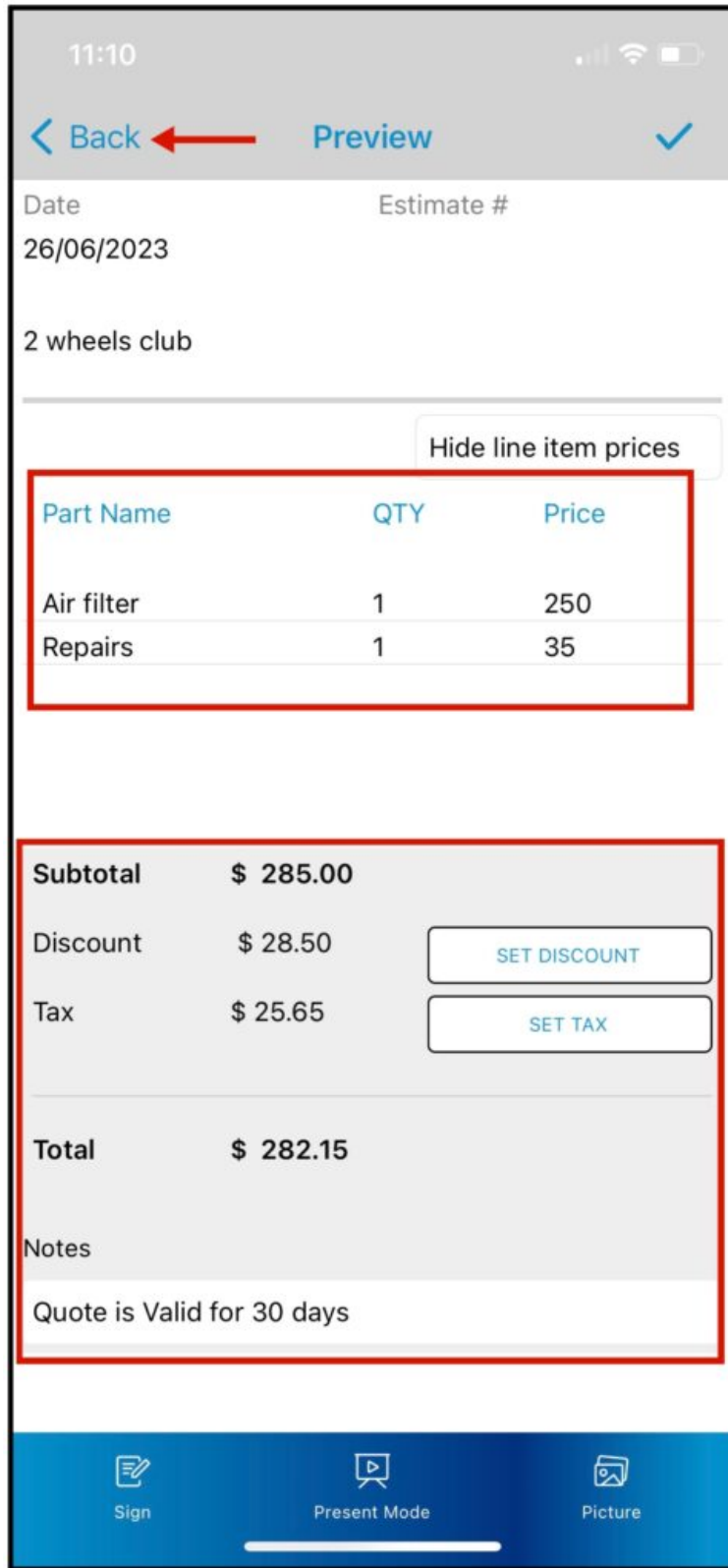
Give the estimate a description, and click on the arrow icon to proceed.



Add Items to the Estimate

1. Select which warehouse you wanted to get the item from.
2. Search or select the items by tapping on the slider bar on the right side of that item. The **QTY** or the quantity of the item can also be changed.
3. If the Item is new and it's not on the list, tap on the **plus icon to create a new item**.
4. If that item has a barcode, **SCAN** it by tapping Scan at the top right of the screen.
5. Once you have selected the items that you need, tap the **arrow** button at the top right of the screen.





Once the required items have been selected, you'll be directed to the Estimate Preview screen with the details of the part and prices.

If you need to add more items, just **tap the back button to edit** the estimate.

Add tax or discount, it will give you the option to add tax or discount in **percentage value or monetary value**.

Notes – Type in Notes for Customer.

Save the estimate by clicking on the check icon on the top right.

Date Estimate #

26/06/2023

2 wheels club

Hide line item prices

Part Name	QTY	Price
Air filter	1	250
Repairs	1	35

Subtotal \$ 285.00

Discount \$ 28.50

SET DISCOUNT

Tax \$ 25.65

SET TAX

Total \$ 282.15

Notes

Quote is Valid for 30 days



Sign



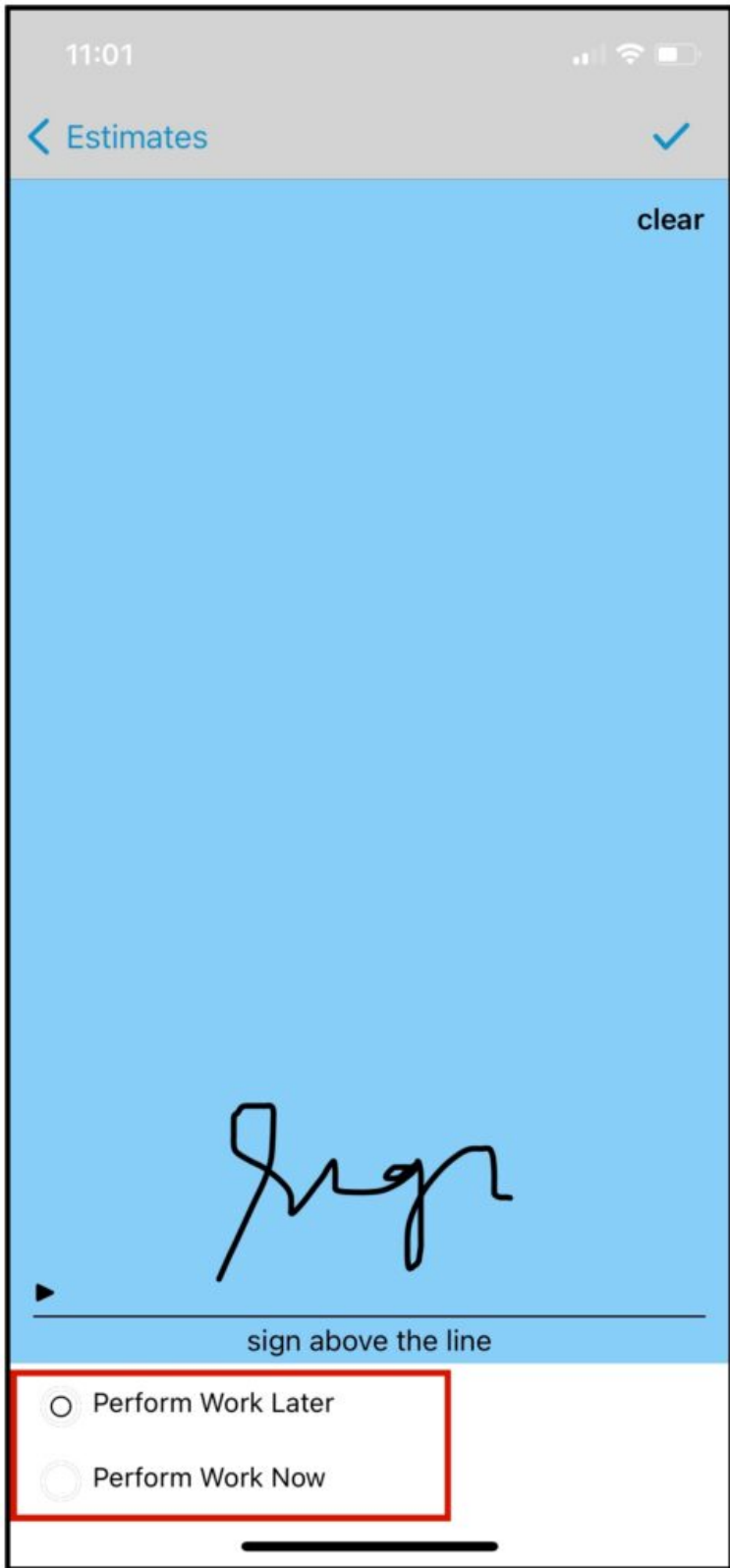
Present Mode



Picture

Sign

Click on the sign button to have the customer sign the estimate.



Sign

After clicking on the sign, the signature pad will pop up. Place your signature and select if you want to perform the work now or later. Click on the check icon on the top right to save.

Perform work later – **will mark the estimate as won and save it.**

Perform work now – **This will give you two options, create this estimate for a new job or add this as a task on an existing job.**

< Back

Preview



Date

Estimate #

26/06/2023

2 wheels club

Hide line item prices

Part Name	QTY	Price
Air filter	1	250
Repairs	1	35

Subtotal \$ 285.00

Discount \$ 28.50

SET DISCOUNT

Tax \$ 25.65

SET TAX

Total \$ 282.15

Notes

Quote is Valid for 30 days



Sign



Present Mode



Picture

Present Mode

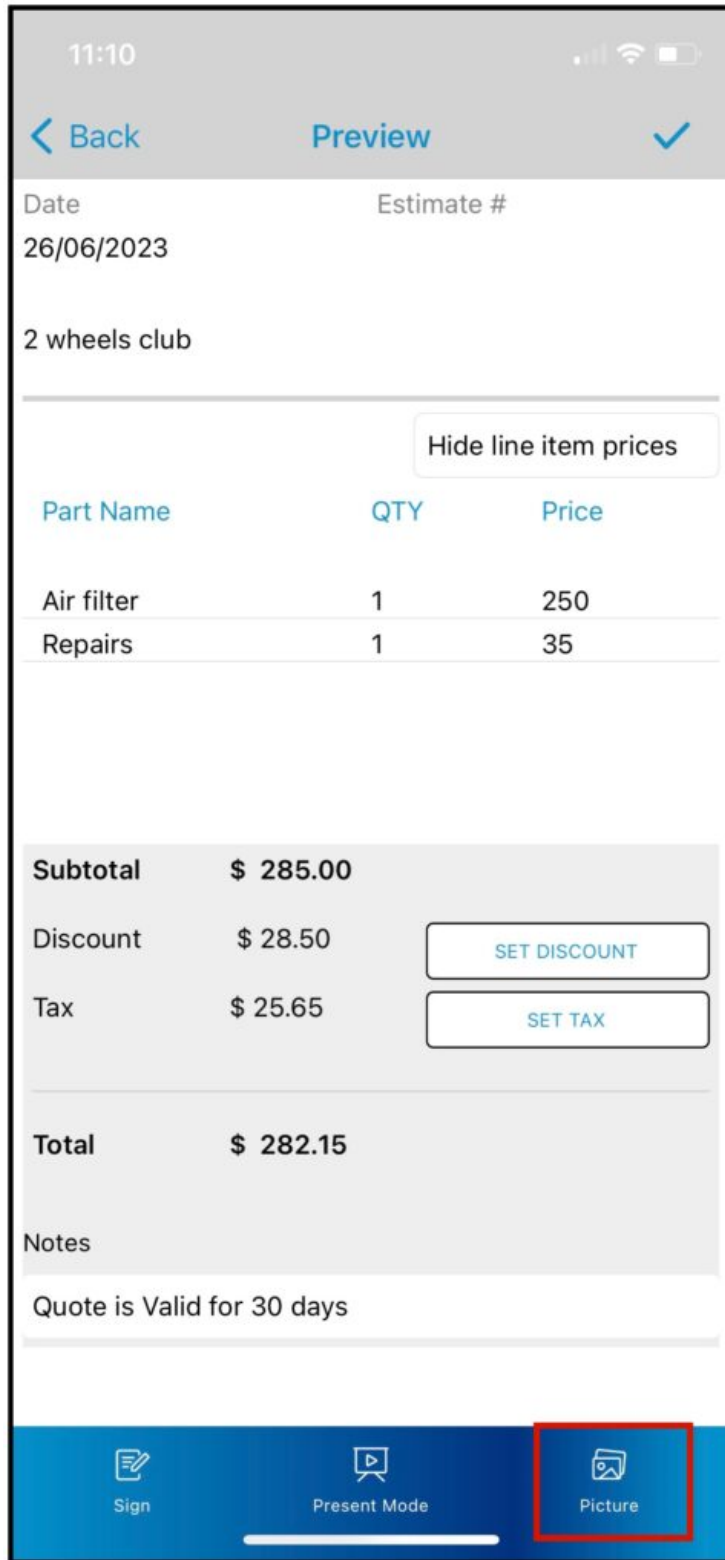
Estimate presentation mode

< Preview

Part Name	Price
Air filter	250
Repairs	35
Subtotal:	\$ 285
Total Discount:	\$ 28.5
You Pay:	\$ 282.15

Present Mode

This will show you a breakdown presentation of the estimates items, sub-total, total discount, and how much you need to pay.



Attach Picture to Estimate

To attach pictures to estimate, click on **Picture Tab**. It will let you choose to attach pictures from the gallery or open your camera.

Click on the Check icon on the top right to save the estimate.

