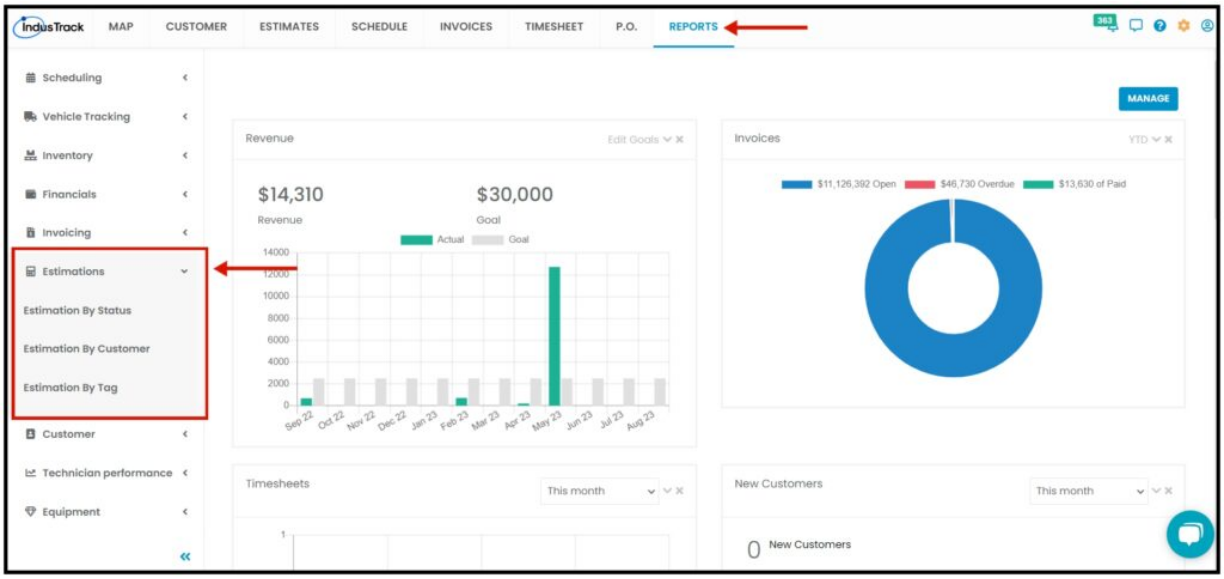
Estimations Report

Estimate reports play a crucial role in your business. Estimate reports help managers/supervisors assess the feasibility and viability of a job or project. By providing accurate cost estimates, these reports enable you to make informed decisions about whether to proceed with the job or project.

To access **Estimations Report**, click on the **REPORTS Module**> on the left-hand side and click on **Estimations**.

A drop-down option will show its subcategories for the reports you want to see:

- Estimation By Status
- Estimation By Customer
- Estimation By Tag

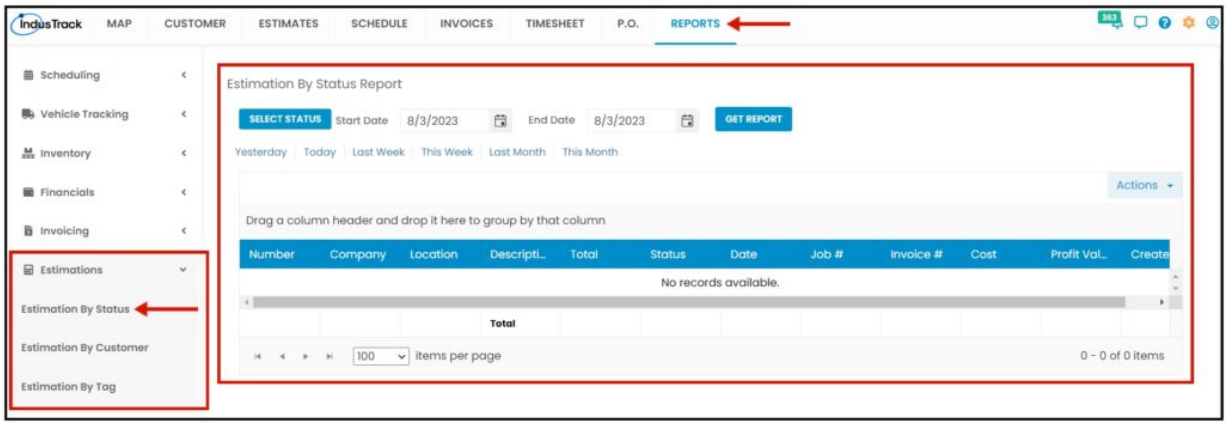


Estimation By Status

In this Report, you will be able to generate each of the statuses of the estimates such as:

- Change Request – After creating an estimate, you will be able to send the estimate to the customer for approval or if they want to make changes to the estimate. Select the status “Change Request” to view all the estimates that the customer requested for changes.
- Draft –
- Won – Estimates that the customers approved.
- Scheduled – Estimates that are approved and converted to jobs.
- Sent – Estimates that were sent to the customers via email.
- Lost- Rejected estimates.
- Invoiced – Estimates that were successfully invoiced.

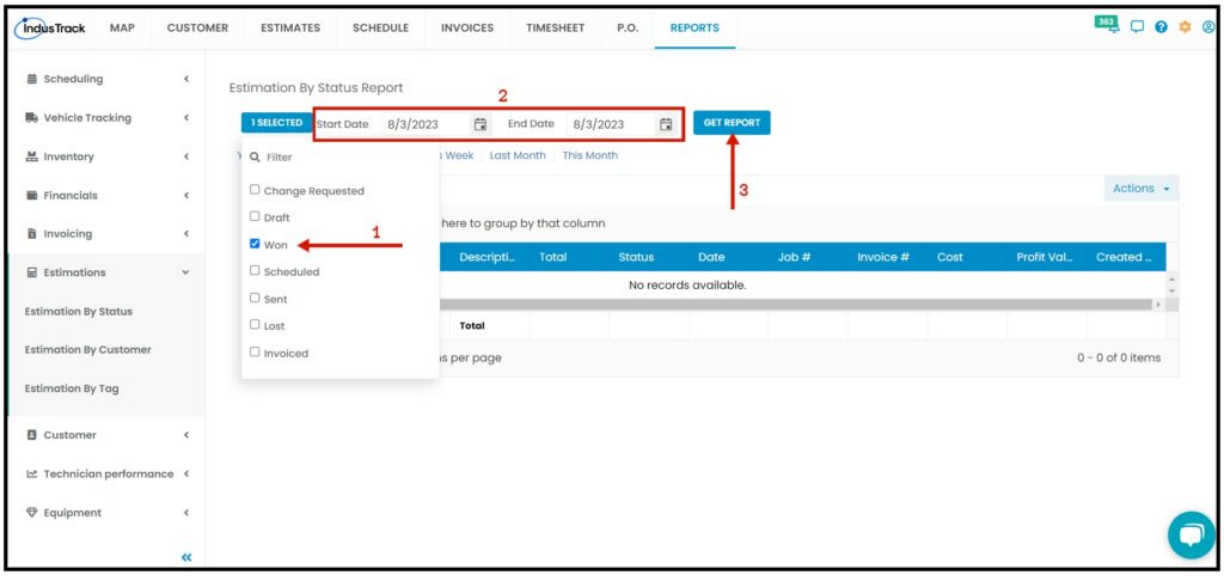
To view the Estimate By Status Report, go to **Reports** Menu on the top> Click **Estimations**> on the drop-down click **Estimation By Status**.



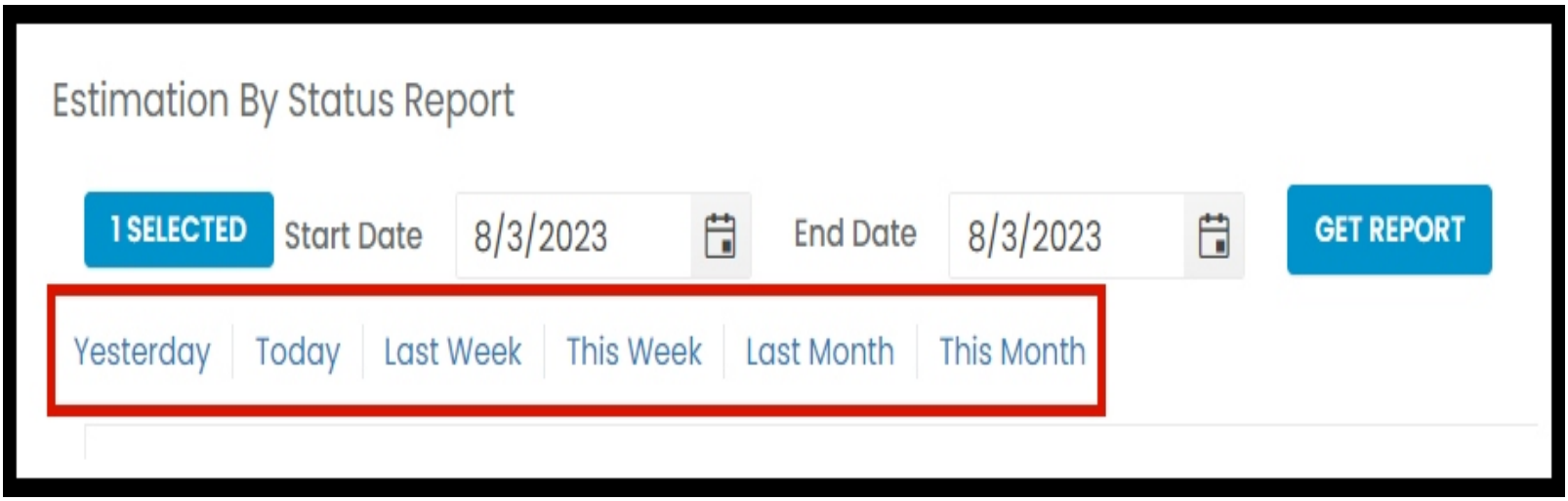
Generate Estimation By Status Report

You can filter the report by the following:

1. Status– Which status you would like to generate
    - Change Requested, Draft, Won, Scheduled, Sent, Lost, Invoiced.
    - You can only select one status each time.
2. Date/s – The estimate created date.
    - Select the **start date** and **end date**
3. After you selected the status and the start and end date, click on **Get Report.**



- Alternatively, you can also select a period rather than selecting a specific date:
    - *Yesterday* | *Today* | *last Week* | *This Week* | *Last Month* | *This Month*



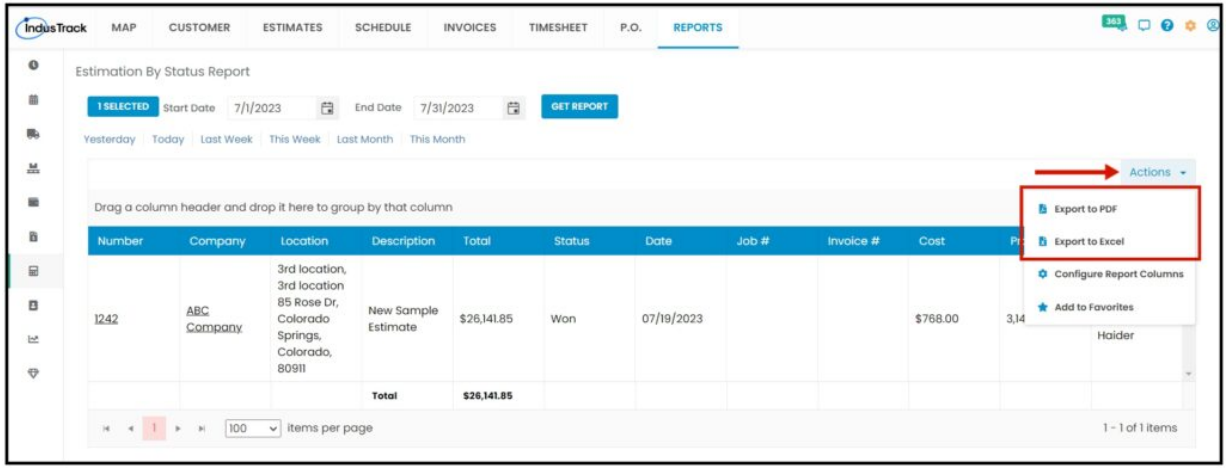
After we click on Get Report, we can now export the Estimation By Status Report into **Excel or PDF format** by clicking on the **Actions Button.**

Actions Button

- Export to PDF
- Export to Excel
- Configure Report Columns
- Add to Favorites

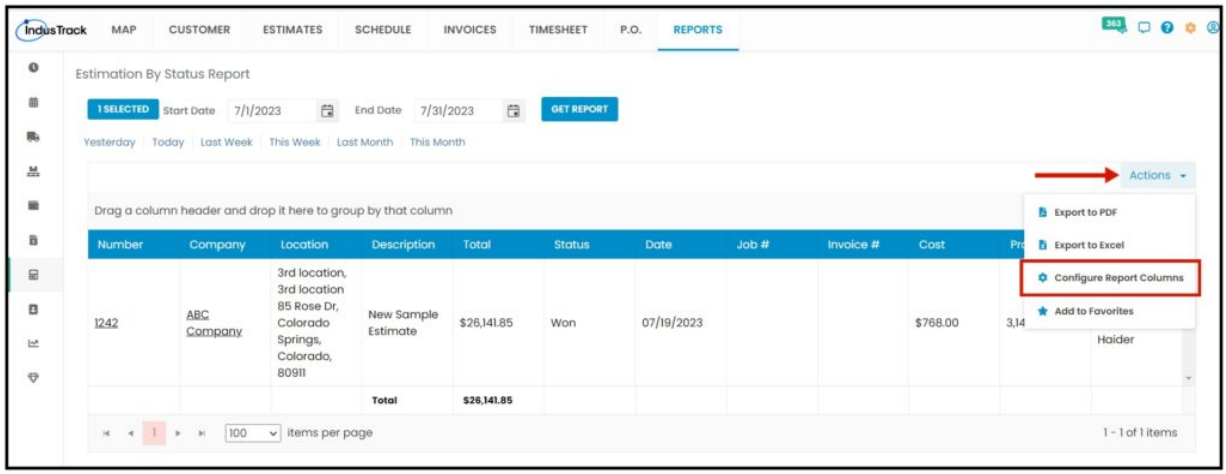
Export Report

- Click on **export to Excel** or **export to PDF** to download the report to your computer. Either way, you can completely see the details in the report.

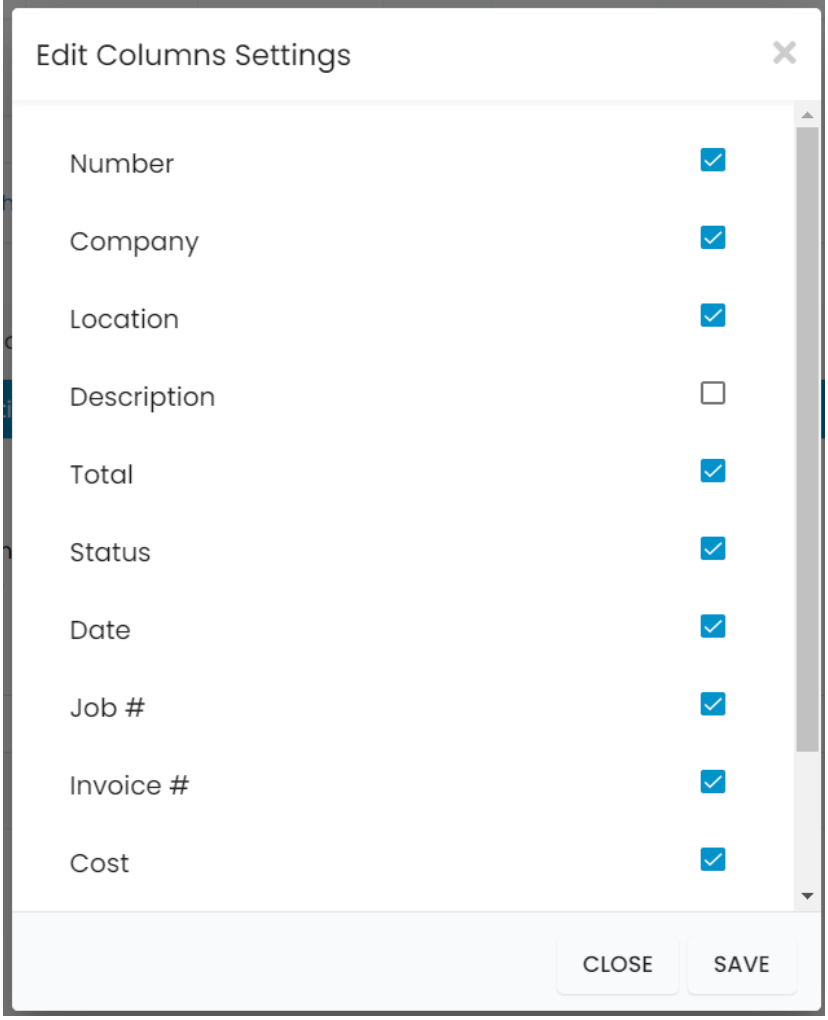


Configure Report Columns

Enable or disable the columns on this report if you want to see them or not. When disabling the column/s, once you generate this report that specific column will be removed.

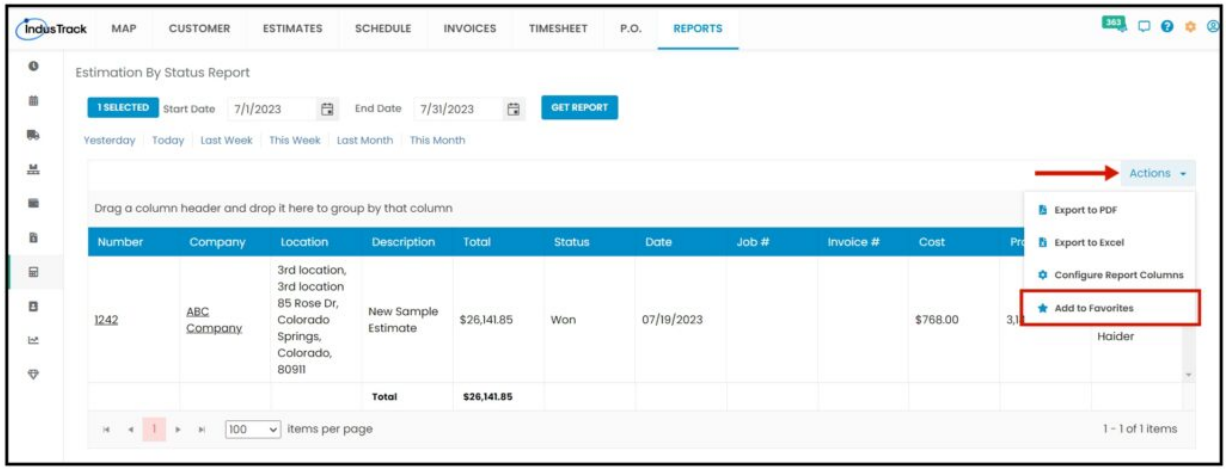


Uncheck columns you don’t want to see in the Report. **Click SAVE after configuring.**

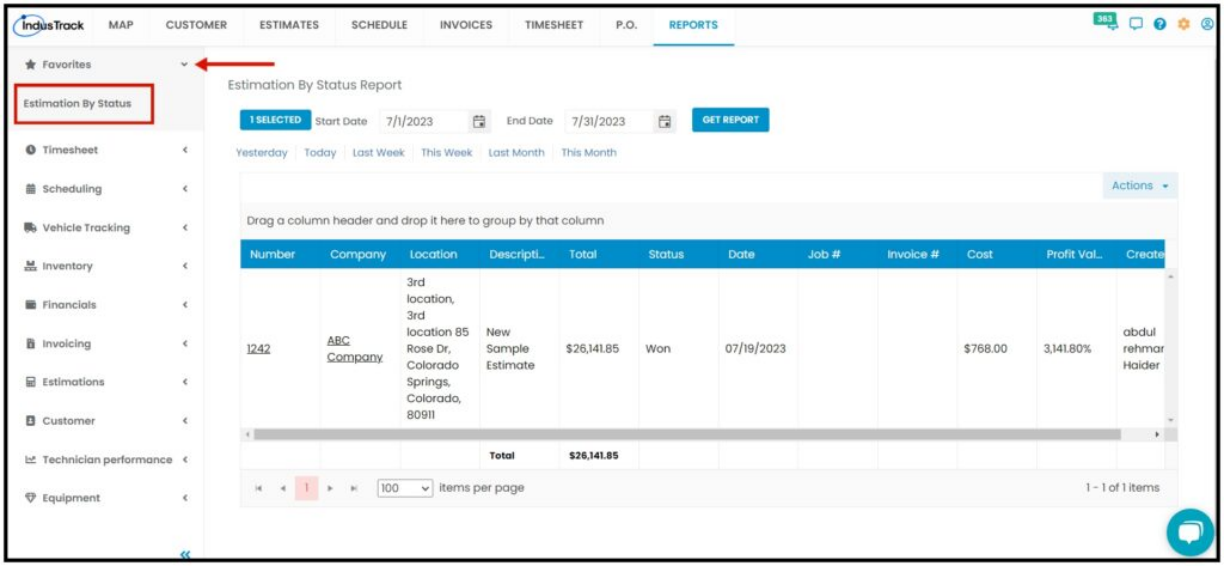


Add to Favorites

If you are frequently using this Report, you can select and Add it to your Favorites.



After you added a Report to **Favorites**, a **Favorite Tab** will be added at the top right of the left panel. All reports that are added to Favorite will be listed in the Top panel for easy access.

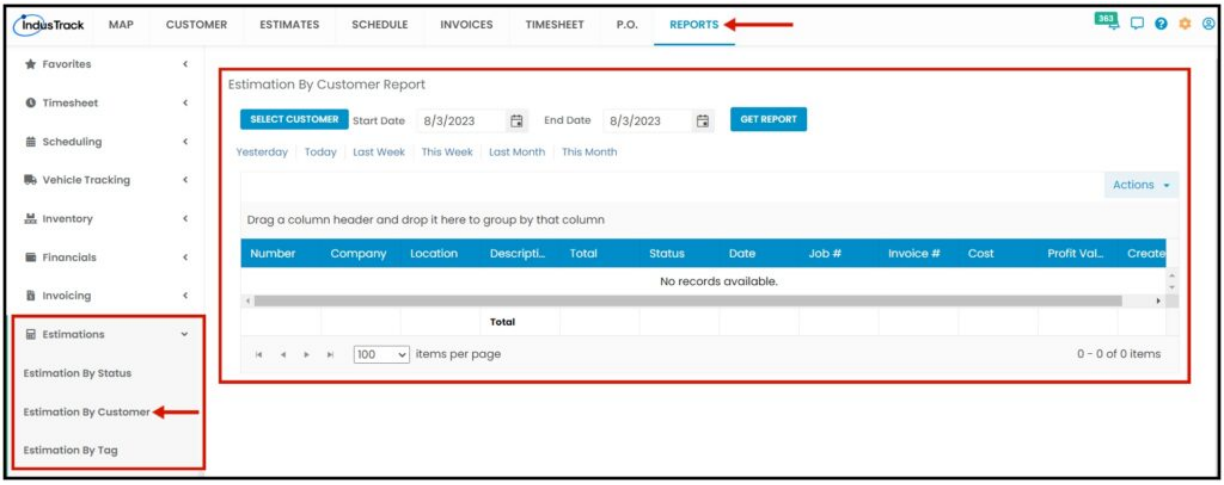


Estimation By Customer Report

You can find in this report the details of the customers and the estimates:

- Estimate Number
- Company Name
- Location
- Description
- Total
- Status – Status of the Estimate
- Date
- Job # – If there is a job associated with the Estimate
- Invoice # – If there is an invoice associated with the Estimate
- Cost
- Profit Value
- Created By- Who created the estimate

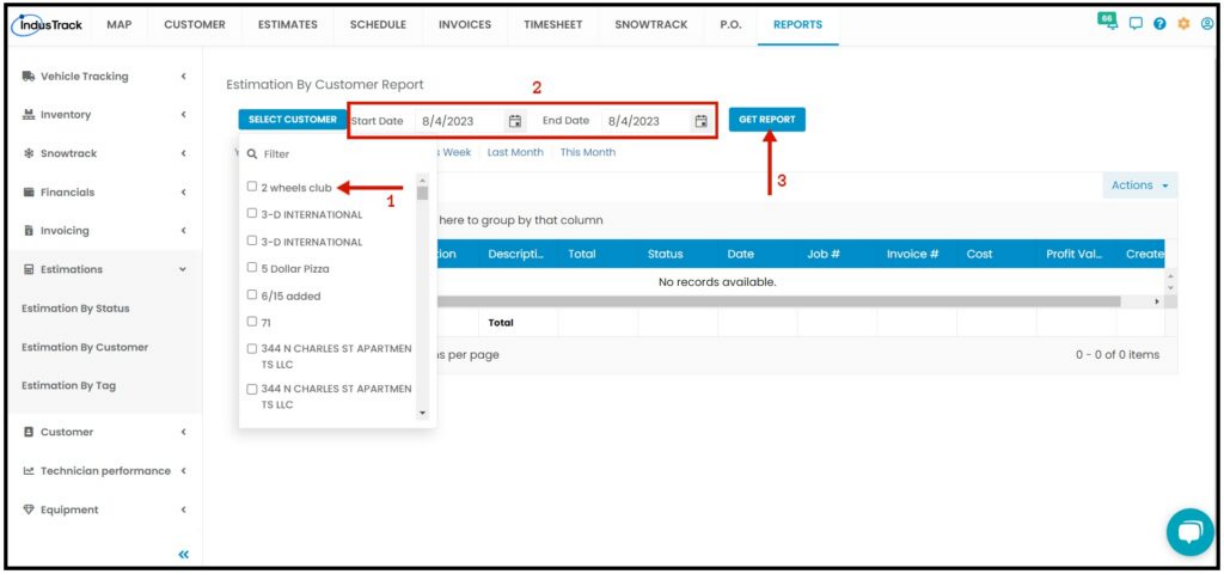
To view **Estimation by Customer Report**, go to **Reports** Menu on the top> Click **Invoicing**> on the drop-down click **Estimation by Customer Report**.



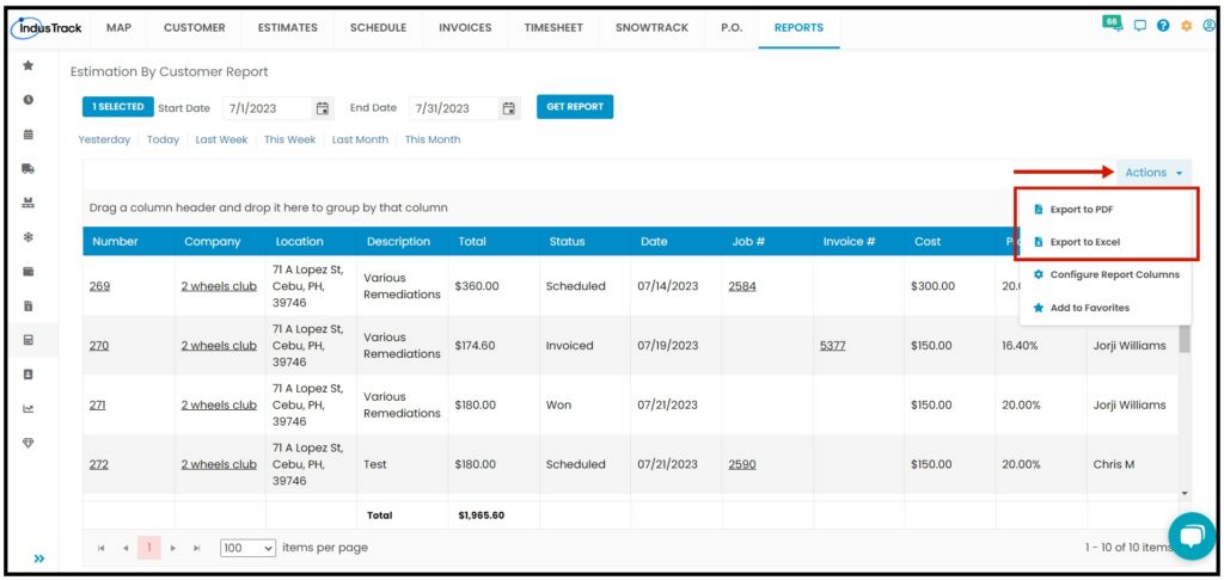
Generate Estimation By Customer Report

You can filter the report by the following:

1. Customer
    - Click on **Select Customer**
    - You can only select one customer at a time.
2. Date/s – The estimate created date.
    - Select the **start date** and **end date**
3. After you selected the customer and the start and end date, click on **Get Report.**

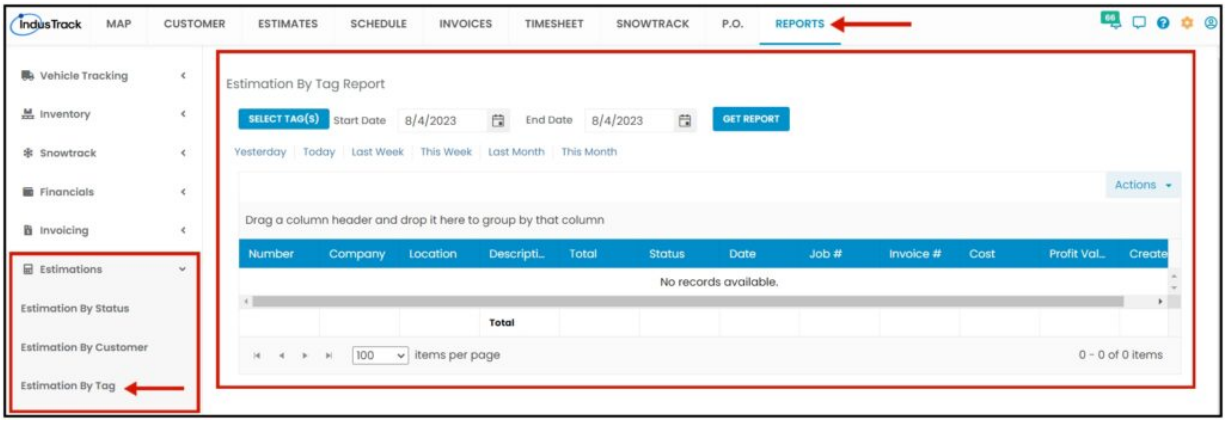


After we click on Get Report, we can now export the Estimation By Customer Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel.**



Estimation By Tag Report

In this Report, you can generate estimates by their Tags. To view **Estimates By Tag Report**, go to **Reports** Menu on the top> click **Estimations**> on the drop-down click **Estimation By Tag Report**.



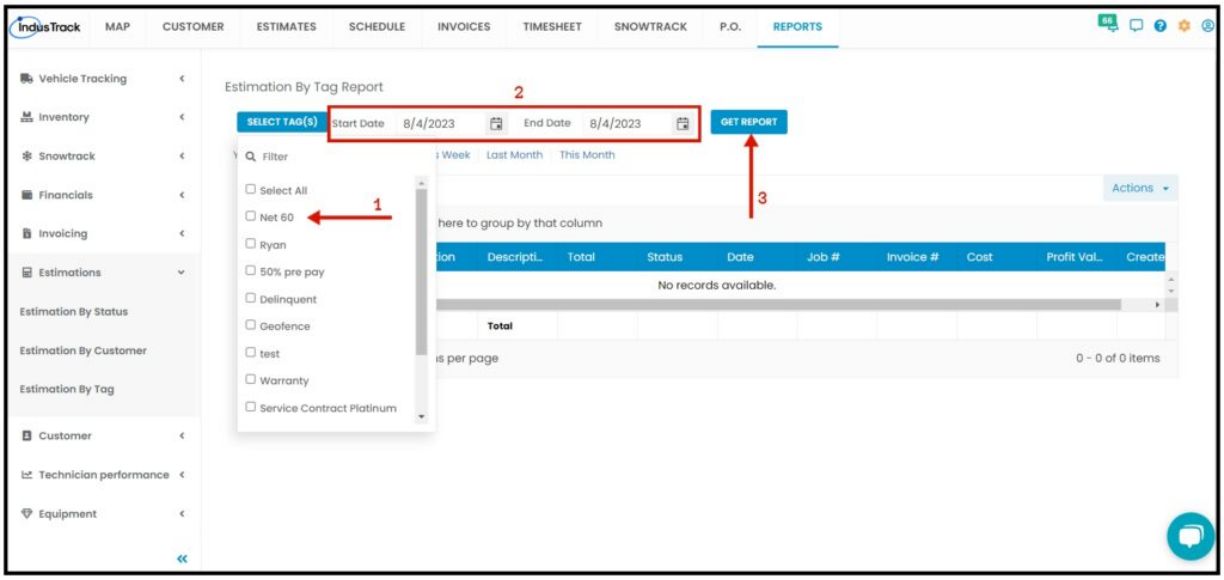
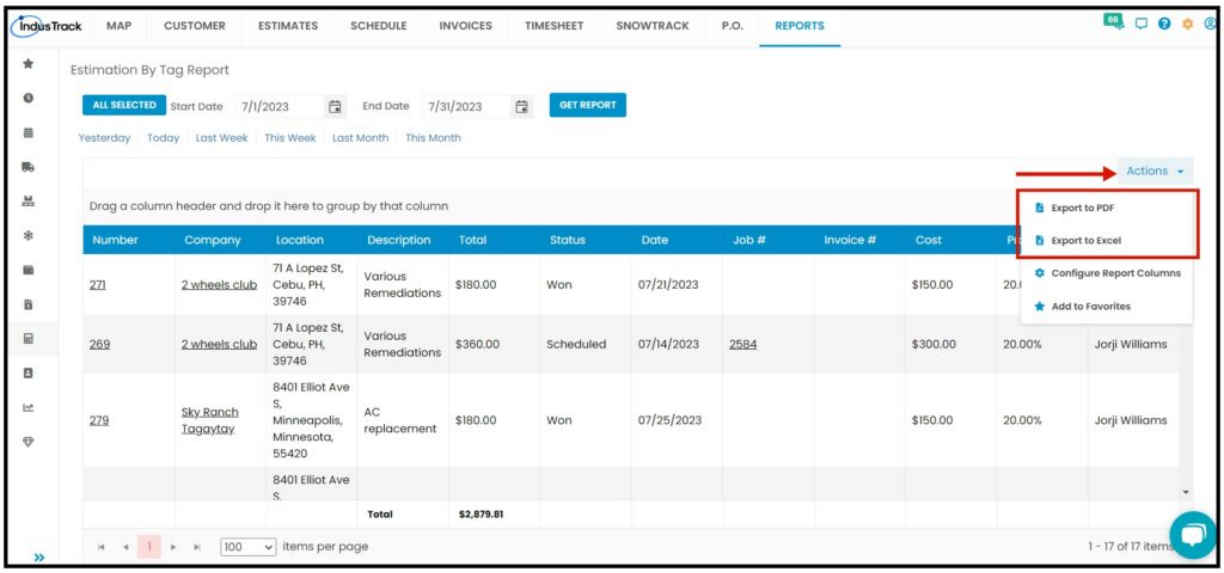
Generate Estimation by Tag Report

You can filter the report by the following:

1. Tag/s –
    - Click on **Select Tag/s**

- You have the option to either select one tag or multiple tags.

2. Date/s – The estimate created date.
    - Select the **start date** and **end date**
3. After you selected the tag/s and the start and end date, click on **Get Report.**



After we click on Get Report, we can now export the Estimate By Tag Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel.**