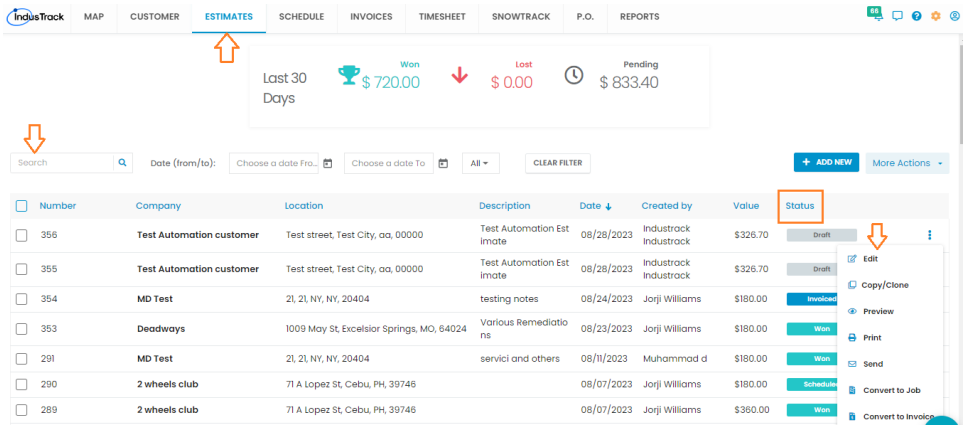
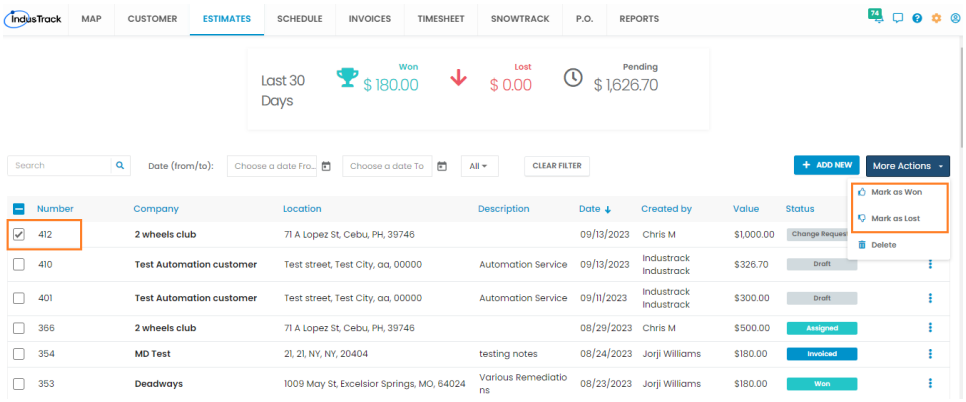
Estimates

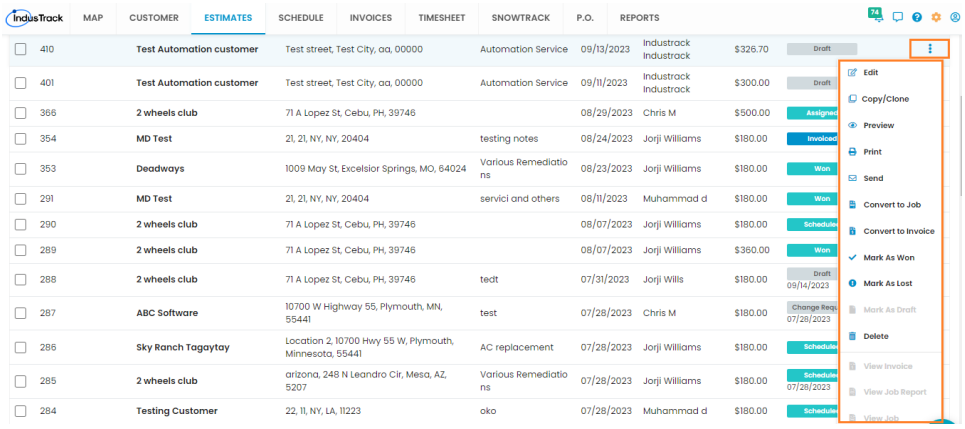
The Estimates module will allow you to view all your estimates and their statuses. You can quickly search for an existing estimate.



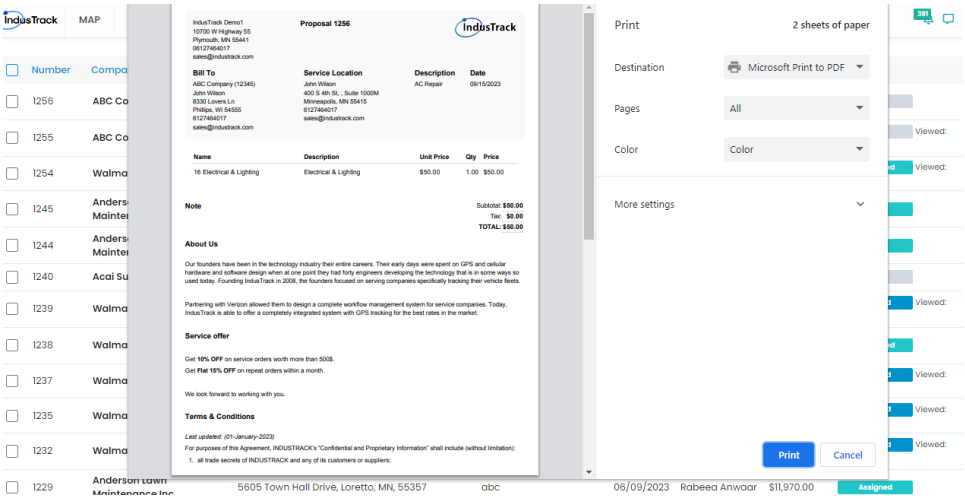
Choose an estimate and click **More Actions** button to mark the estimate as **Won** or **Lost**.



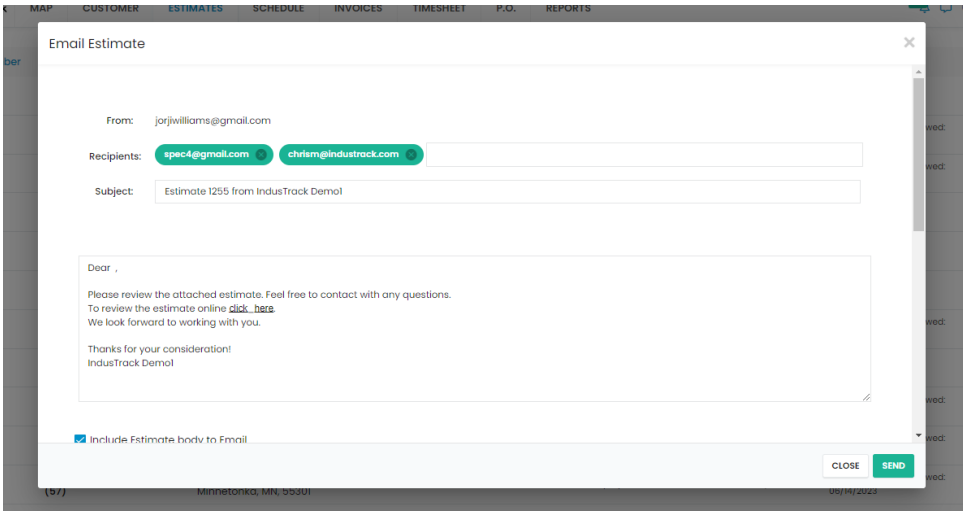
Click on 3-dots at far-right for an estimate and a list of actions items will be displayed.



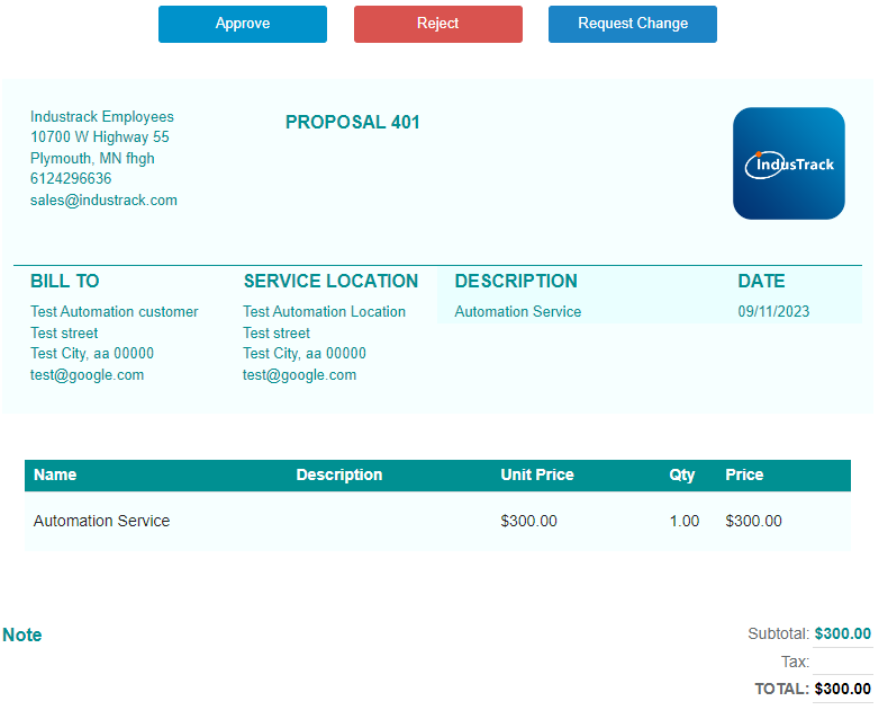
1. **Edit**: This option is used to make changes to an existing estimate.
2. **Copy/Clone**: Copy and clone and estimate using this option.
3. **Preview**: This option will have you preview based on the selected template. This is how your customers will see it.
4. **Print**: This option is used to print an estimate.



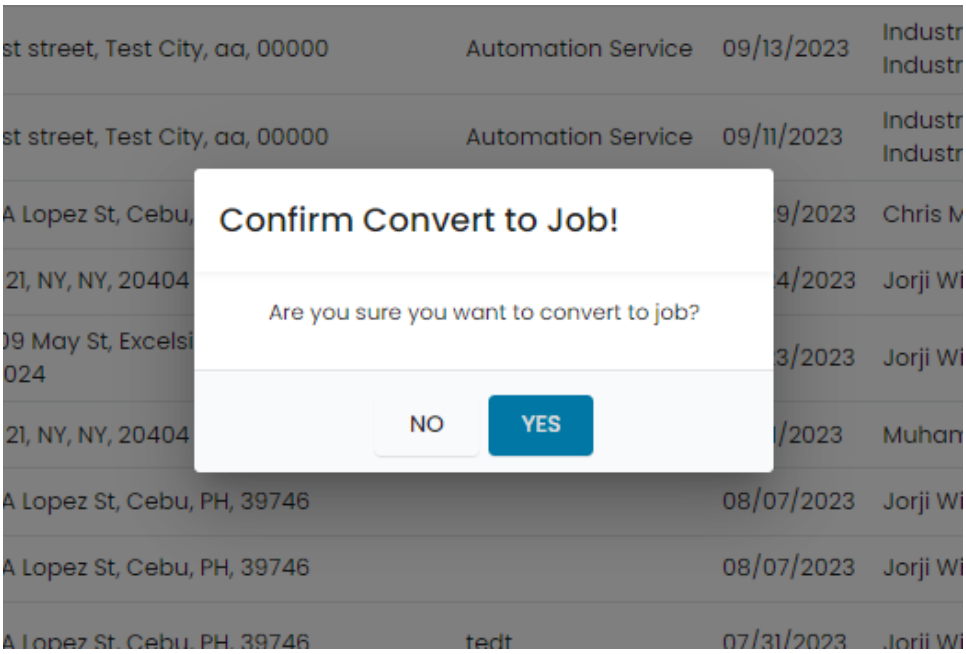
5. **Send**: This will be helpful in sending out an estimate to the customer. You can enter multiple recipient's email addresses if you would like to send an estimate to more than one person.

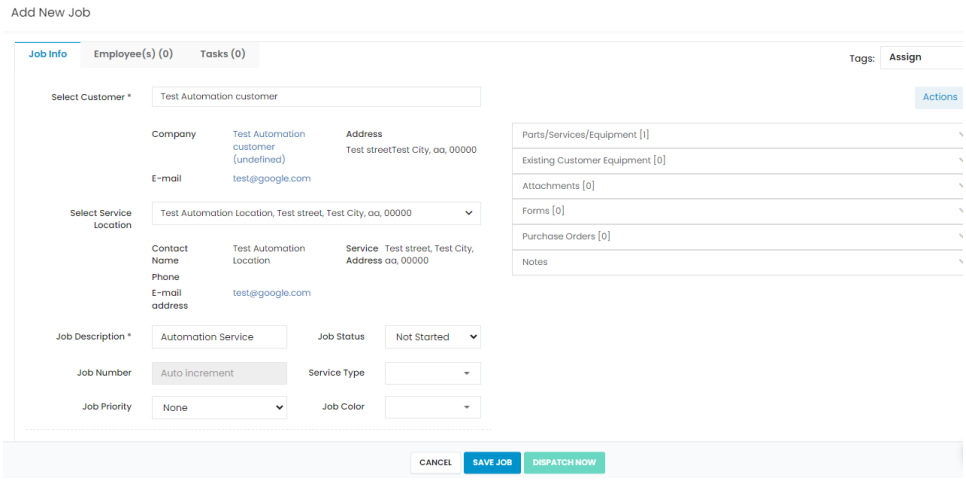


Once the customer receives an email, they will find options to **Approve**, **Reject** or **Request Change**. If customer clicks any of these buttons, the status for that estimate will automatically change in Industrack.

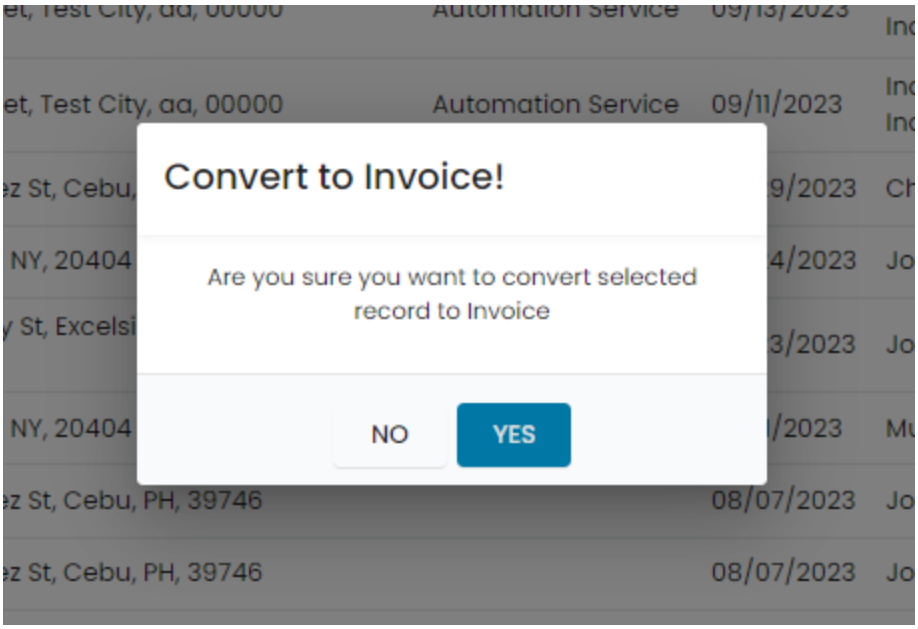


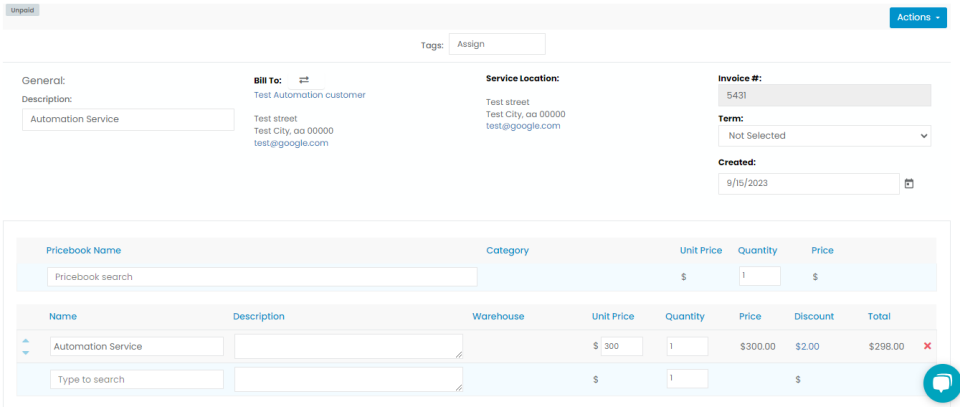
6. **Convert to Job**: Once an estimate has been approved by a customer, then you can easily convert that estimate into a job. After selecting Convert to Job, click YES on confirmation screen and start creating a job. If Convert to Job option is greyed out, it means the estimate has already been scheduled. In this case, you can view the job associated with an estimate and you may also view the job detailed report to see the notes, attachments, task details etc.



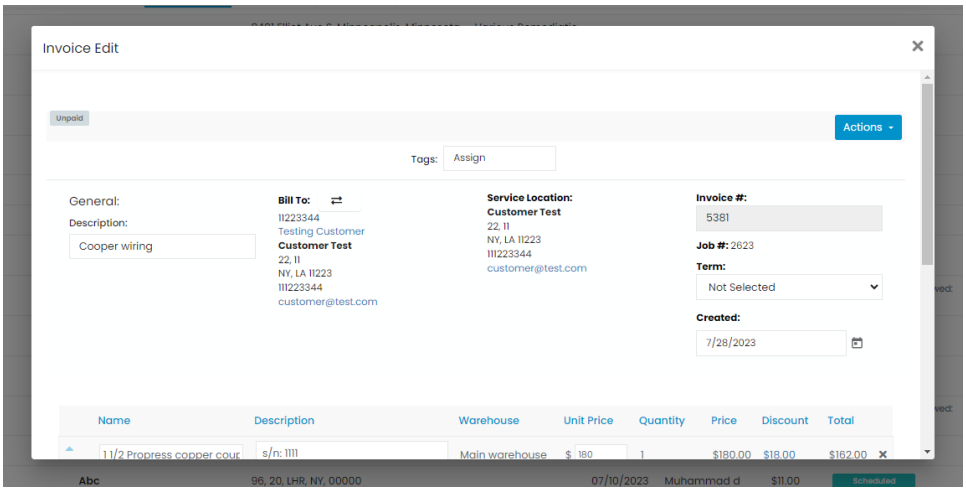


7. **Convert to Invoice**: If you would like to convert an estimate directly into an invoice, simply choose this option, click YES on confirmation screen and complete the invoice setup. If Convert to Invoice option is greyed out, it means the estimate has already been converted into an invoice. In this case, you can view the associated invoice with an estimate.

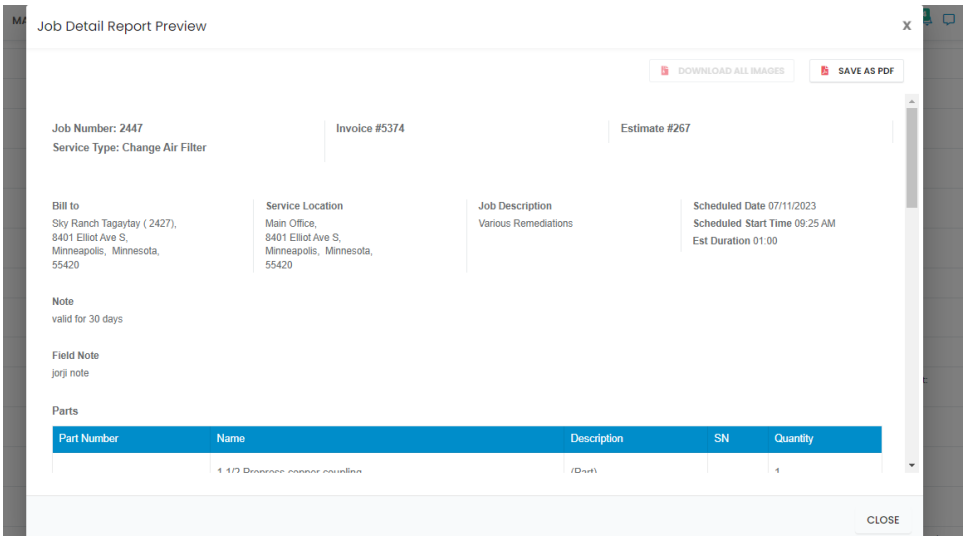




8. **Mark as Won/Mark as Lost**: To manually change the status of an estimate to Won or Lost, choose the option from the list.
9. **View Invoice**: If an estimate is already converted into an invoice and the status of an estimate says 'Invoiced' then you can view the invoice. If View Invoice option is greyed out, it means the estimate has not been converted into an invoice yet.

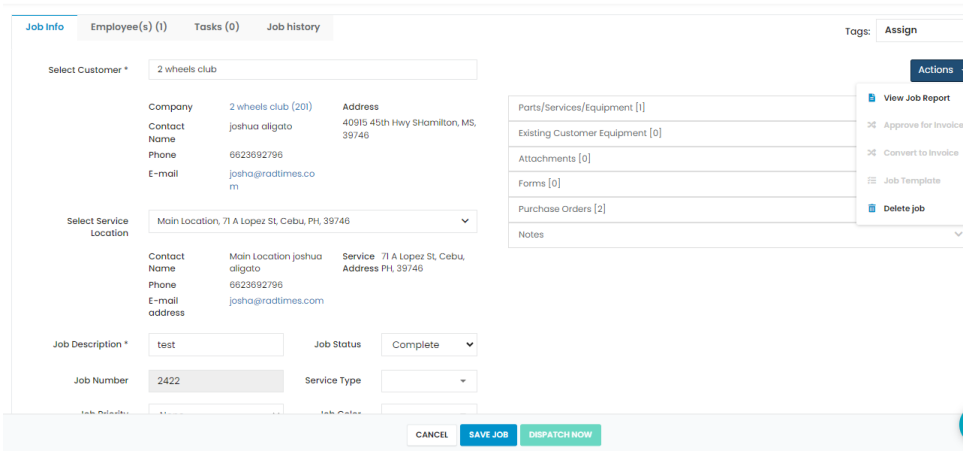


10. **View Job Report**: If an estimate is converted into a job or the status says 'Scheduled', then you can view the Job Detailed Report. The Job Detail Report will display the notes, parts, equipment, forms, attachments, and task details associated with that job.



11. **View Job**: To open the Job in edit mode, select View Job option. This will allow you to look at the job information, field employee(s), job history and other details.

Edit Job


Job Info
Employee(s) (1)
Tasks (0)
Job history
Tags:
Assign
Select Customer *
2 wheels club
Actions
Company
2 wheels club (201)
Address
40915 45th Hwy SHamilton, MS, 39746
Contact Name
joshua aligato
Phone
6623692796
E-mail
josha@radtimes.com
Parts/Services/Equipment [1]
Existing Customer Equipment [0]
Attachments [0]
Forms [0]
Purchase Orders [2]
Notes
View Job Report
Approve for Invoice
Convert to Invoice
Job Template
Delete job
Select Service Location
Main Location, 71 A Lopez St, Cebu, PH, 39746
Contact Name
Main Location joshua aligato
Service Address
71 A Lopez St, Cebu, PH, 39746
Phone
6623692796
E-mail address
josha@radtimes.com
Job Description *
test
Job Status
Complete
Job Number
2422
Service Type
CANCEL
SAVE JOB
DISPATCH NOW