

Estimates

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

The screenshot shows the IndusTrack interface with the 'ESTIMATES' tab selected. A summary box at the top indicates 'Last 30 Days' with a 'Won' amount of \$720.00, a 'Lost' amount of \$0.00, and a 'Pending' amount of \$833.40. Below this is a search bar and a table of estimates. The table has columns for Number, Company, Location, Description, Date, Created by, Value, and Status. The 'Status' column is highlighted with an orange box. A dropdown menu is open for the 'Status' of the first estimate (356), showing options like 'Draft', 'Edit', 'Copy/Clone', 'Preview', 'Print', 'Send', 'Convert to Job', and 'Convert to Invoice'.

Number	Company	Location	Description	Date	Created by	Value	Status
356	Test Automation customer	Test street, Test City, aa, 00000	Test Automation Est imate	08/28/2023	Industrack Industrack	\$326.70	Draft
355	Test Automation customer	Test street, Test City, aa, 00000	Test Automation Est imate	08/28/2023	Industrack Industrack	\$326.70	Draft
354	MD Test	21, 21, NY, NY, 20404	testing notes	08/24/2023	Jorji Williams	\$180.00	Invoice
353	Deadways	1009 May St, Excelsior Springs, MO, 64024	Various Remediations	08/23/2023	Jorji Williams	\$180.00	Won
291	MD Test	21, 21, NY, NY, 20404	servici and others	08/11/2023	Muhammad d	\$180.00	Won
290	2 wheels club	71 A Lopez St, Cebu, PH, 39746		08/07/2023	Jorji Williams	\$180.00	Schedule
289	2 wheels club	71 A Lopez St, Cebu, PH, 39746		08/07/2023	Jorji Williams	\$360.00	Won

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

The screenshot shows the IndusTrack interface with the 'ESTIMATES' tab selected. A summary box at the top indicates 'Last 30 Days' with a 'Won' amount of \$180.00, a 'Lost' amount of \$0.00, and a 'Pending' amount of \$1,626.70. Below this is a search bar and a table of estimates. The 'More Actions' button is highlighted with an orange box, and its dropdown menu is open, showing options like 'Mark as Won', 'Mark as Lost', and 'Delete'. The first estimate (412) is also highlighted with an orange box.

Number	Company	Location	Description	Date	Created by	Value	Status
412	2 wheels club	71 A Lopez St, Cebu, PH, 39746		09/13/2023	Chris M	\$1,000.00	Change Request
410	Test Automation customer	Test street, Test City, aa, 00000	Automation Service	09/13/2023	Industrack Industrack	\$326.70	Draft
401	Test Automation customer	Test street, Test City, aa, 00000	Automation Service	09/11/2023	Industrack Industrack	\$300.00	Draft
366	2 wheels club	71 A Lopez St, Cebu, PH, 39746		08/29/2023	Chris M	\$500.00	Assigned
354	MD Test	21, 21, NY, NY, 20404	testing notes	08/24/2023	Jorji Williams	\$180.00	Involved
353	Deadways	1009 May St, Excelsior Springs, MO, 64024	Various Remediations	08/23/2023	Jorji Williams	\$180.00	Won

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

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	
<input type="checkbox"/>	410	Test Automation customer	Test street, Test City, aa, 00000	Automation Service	09/13/2023	Industrack Industrack	\$326.70	Draft		⋮
<input type="checkbox"/>	401	Test Automation customer	Test street, Test City, aa, 00000	Automation Service	09/11/2023	Industrack Industrack	\$300.00	Draft		⋮
<input type="checkbox"/>	366	2 wheels club	71 A Lopez St, Cebu, PH, 39746		08/29/2023	Chris M	\$500.00	Assign		⋮
<input type="checkbox"/>	354	MD Test	21, 21, NY, NY, 20404	testing notes	08/24/2023	Jorji Williams	\$180.00	Invoice		⋮
<input type="checkbox"/>	353	Deadways	1009 May St, Excelsior Springs, MO, 64024	Various Remediations	08/23/2023	Jorji Williams	\$180.00	Win		⋮
<input type="checkbox"/>	291	MD Test	21, 21, NY, NY, 20404	servici and others	08/11/2023	Muhammad d	\$180.00	Win		⋮
<input type="checkbox"/>	290	2 wheels club	71 A Lopez St, Cebu, PH, 39746		08/07/2023	Jorji Williams	\$180.00	Schedule		⋮
<input type="checkbox"/>	289	2 wheels club	71 A Lopez St, Cebu, PH, 39746		08/07/2023	Jorji Williams	\$350.00	Win		⋮
<input type="checkbox"/>	288	2 wheels club	71 A Lopez St, Cebu, PH, 39746	tedt	07/31/2023	Jorji Wills	\$180.00	Draft		⋮
<input type="checkbox"/>	287	ABC Software	10700 W Highway 55, Plymouth, MN, 55441	test	07/28/2023	Chris M	\$180.00	Change Req.		⋮
<input type="checkbox"/>	286	Sky Ranch Tagaytay	Location 2, 10700 Hwy 55 W, Plymouth, Minnesota, 55441	AC replacement	07/28/2023	Jorji Williams	\$180.00	Schedule		⋮
<input type="checkbox"/>	285	2 wheels club	arizona, 248 N Leandro Cir, Mesa, AZ, 5207	Various Remediations	07/28/2023	Jorji Williams	\$180.00	Schedule		⋮
<input type="checkbox"/>	284	Testing Customer	22, 11, NY, LA, 11223	oko	07/28/2023	Muhammad d	\$180.00	Schedule		⋮

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.

IndusTrack

MAP

Number

Company

1256

ABC Co

1255

ABC Co

1254

Walma

1245

Anders Mainte

1244

Anders Mainte

1240

Acal Su

1239

Walma

1238

Walma

1237

Walma

1235

Walma

1232

Walma

1229

Anderson Mainte

IndusTrack Demo1

50700 W Highway 55

Plymouth, MN 55441

6127464017

sales@industrack.com

Bill To

ABC Company (12345)

John Wilson

8330 Lovers Ln

Phelps, WI 54555

6127464017

sales@industrack.com

Service Location

400 S. 4th St., Suite 1000M

Minneapolis, MN 55415

6127464017

sales@industrack.com

Description

AC Repair

Date

08/19/2023

Name

Description

Unit Price

Qty

Price

16 Electrical & Lighting

Electrical & Lighting

\$50.00

1.00

\$50.00

Note

Subtotal \$50.00

Tax \$0.00

TOTAL: \$50.00

About Us

Our founders have been in the technology industry their entire careers. Their early days were spent on GPS and cellular hardware and software design when at one point they had forty engineers developing the technology that is in some ways so used today. Founding IndusTrack in 2008, the founders focused on serving companies specifically tracking their vehicle fleets.

Partnering with Verizon allowed them to design a complete workflow management system for service companies. Today, IndusTrack is able to offer a completely integrated system with GPS tracking for the best rates in the market.

Service offer

Get 15% OFF on service orders worth more than \$500.

Get Flat 15% OFF on repeat orders within a month.

We look forward to working with you.

Terms & Conditions

Last updated: 07-January-2023

For purposes of this Agreement, INDUSTRACK's "Confidential and Proprietary Information" shall include (without limitation):

1. all trade secrets of INDUSTRACK and any of its customers or suppliers;

Print

2 sheets of paper

Destination

Microsoft Print to PDF

Pages

All

Color

Color

More settings

Print

Cancel

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.

MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

Email Estimate

From: jorjwilliams@gmail.com

Recipients:

Subject:

Dear ,

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 Demol


☒ Include Estimate body to Email

CLOSE SEND

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.

Industrack Employees
10700 W Highway 55
Plymouth, MN fhgh
6124296636
sales@industrack.com

PROPOSAL 401



BILL TO	SERVICE LOCATION	DESCRIPTION	DATE
Test Automation customer Test street Test City, aa 00000 test@google.com	Test Automation Location Test street Test City, aa 00000 test@google.com	Automation Service	09/11/2023

Name	Description	Unit Price	Qty	Price
Automation Service		\$300.00	1.00	\$300.00

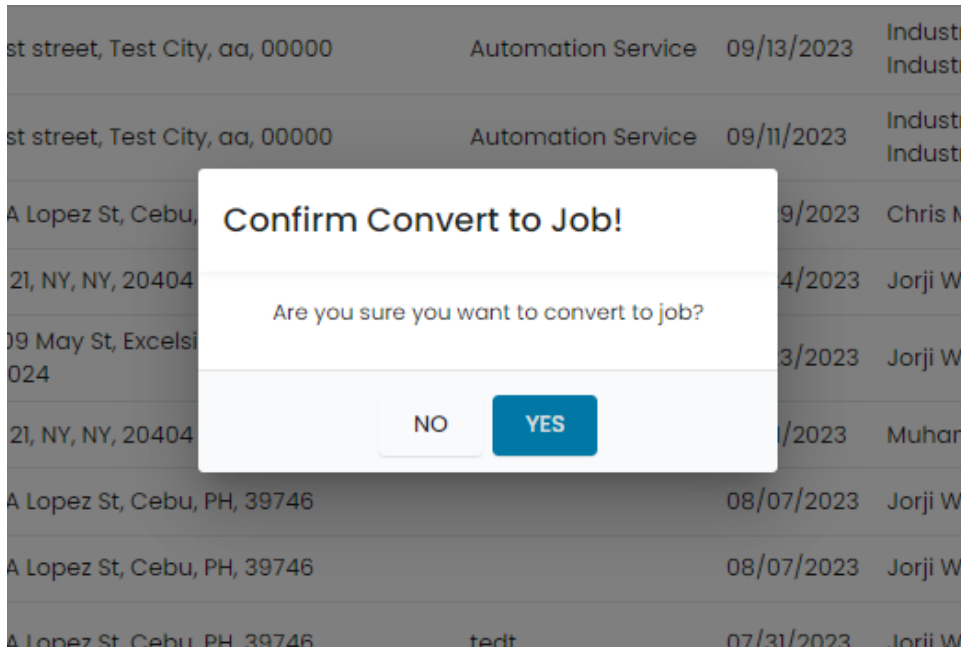
Note

Subtotal: **\$300.00**

Tax:

TOTAL: \$300.00

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.



Add New Job

Job info Employee(s) (0) Tasks (0) Tags: Assign

Select Customer * Test Automation customer Actions

Company Test Automation customer (undefined) Address Test streetTest City, aa, 00000

E-mail test@google.com

Select Service Location Test Automation Location, Test street, Test City, aa, 00000

Contact Name Test Automation Location Service Test street, Test City, Address aa, 00000

Phone

E-mail address test@google.com

Job Description * Automation Service Job Status Not Started

Job Number Auto increment Service Type

Job Priority None Job Color

CANCEL SAVE JOB DISPATCH NOW

Parts/Services/Equipment [1]

Existing Customer Equipment [0]

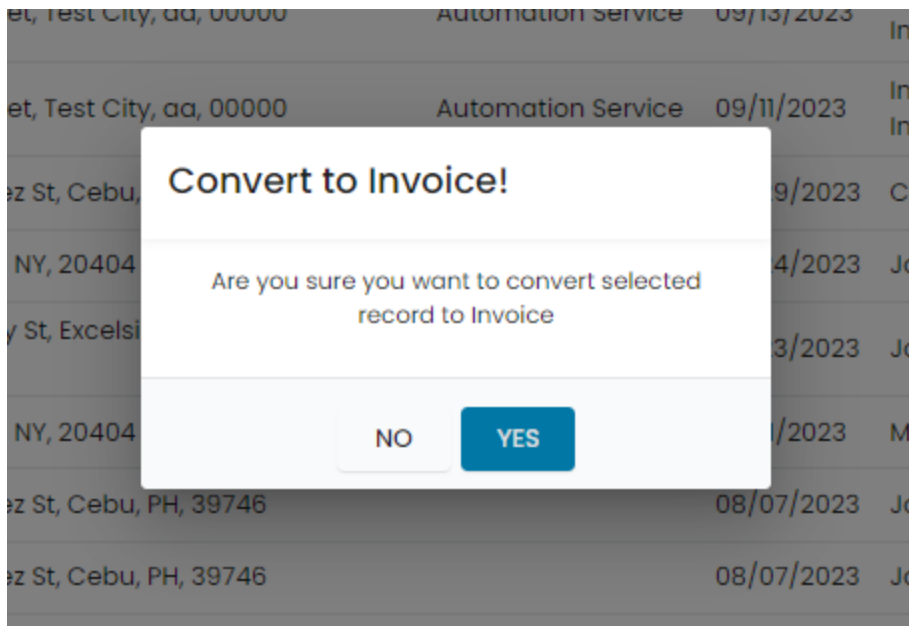
Attachments [0]

Forms [0]

Purchase Orders [0]

Notes

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.



Unpaid Actions -

Tags: Assign

General:
Description: Automation Service

Bill To:
Test Automation customer
Test street
Test City, aa 00000
test@google.com

Service Location:
Test street
Test City, aa 00000
test@google.com

Invoice #:
5431

Term:
Not Selected

Created:
9/15/2023

Pricebook Name	Category	Unit Price	Quantity	Price
Pricebook search		\$	1	\$

Name	Description	Warehouse	Unit Price	Quantity	Price	Discount	Total
Automation Service			\$ 300	1	\$300.00	\$2.00	\$298.00
Type to search			\$	1	\$		

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.

Unpaid

Actions

Tags:

Assign

General:

Description:

Cooper wiring

Bill To:

II223344

Testing Customer

Customer Test

22, II

NY, LA II223

II223344

customer@test.com

Service Location:

Customer Test

22, II

NY, LA II223

II223344

customer@test.com

Invoice #:

5381

Job #:

2623

Term:

Not Selected

Created:

7/28/2023

Name	Description	Warehouse	Unit Price	Quantity	Price	Discount	Total
11/2 Propress copper cou	s/n: IIIII	Main warehouse	\$ 180	1	\$180.00	\$18.00	\$162.00

Abc

96, 20, LHR, NY, 00000

07/10/2023

Muhammad d

\$11.00

Scheduled

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.

Job Detail Report Preview

DOWNLOAD ALL IMAGES

SAVE AS PDF

Job Number: 2447

Service Type: Change Air Filter

Invoice #5374

Estimate #267

Bill to

Sky Ranch Tagaytay (2427),

8401 Elliot Ave S,

Minneapolis, Minnesota,

55420

Service Location

Main Office,

8401 Elliot Ave S,

Minneapolis, Minnesota,

55420

Job Description

Various Remediations

Scheduled Date 07/11/2023

Scheduled Start Time 09:25 AM

Est Duration 01:00

Note

valid for 30 days

Field Note

jorji note

Parts

Part Number	Name	Description	SN	Quantity
1 1/2	Orange rubber coupler	(Duct)		1

CLOSE

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 InfoEmployee(s) (1)Tasks (0)Job history

Tags:Assign

Select Customer *2 wheels club

Company2 wheels club (201)

Contact Namejoshua oligato

Phone6623692796

E-mailjsha@radtimes.co m

Address40915 45th Hwy Shamilton, MS, 39746

Select Service LocationMain Location, 71 A Lopez St, Cebu, PH, 39746

Contact NameMain Location joshua oligato

Phone6623692796

E-mail addressjsha@radtimes.com

Service71 A Lopez St, Cebu, Address PH, 39746

Job Description *test

Job StatusComplete

Job Number2422

Service Type

Job Priority

Job Priority

Parts/Services/Equipment [1]

Existing Customer Equipment [0]

Attachments [0]

Forms [0]

Purchase Orders [2]

Notes

Actions

View Job Report

Approve for Invoice

Convert to Invoice

Job Template

Delete job

CANCEL

SAVE JOB

DISPATCH NOW