

Emailing/Texting (SENDING) Estimates in Pro-Estimator

When in the **Send Estimate** tab, you may type the email address and/or phone number in the **TO** field or the in the **Phone** field if texting (SMS). ****Please be sure to separate email addresses by a semi-colon (;)****. **OR** simply just click on the **BLUE TO, CC, PHONE** buttons and it will populate the email addresses you have entered in those respective fields pertaining to that specific estimate. Then just click on each email address or phone number you wish to send the estimate to. *****PLEASE NOTE...IT IS RECOMMENDED THAT YOU ALSO CC YOURSELF ON ALL EMAILS, THAT WAY YOU CAN REFER TO THEM IF NEEDED. IT'S JUST ANOTHER WAY TO HAVE DOCUMENTATION OF DATE/TIME STAMPING.*****

Payment Info Print **Send Estimate** Edit F

New Send >>

To adjuster@email.com ; customer@web-est.com

CC testshop@gmail.com

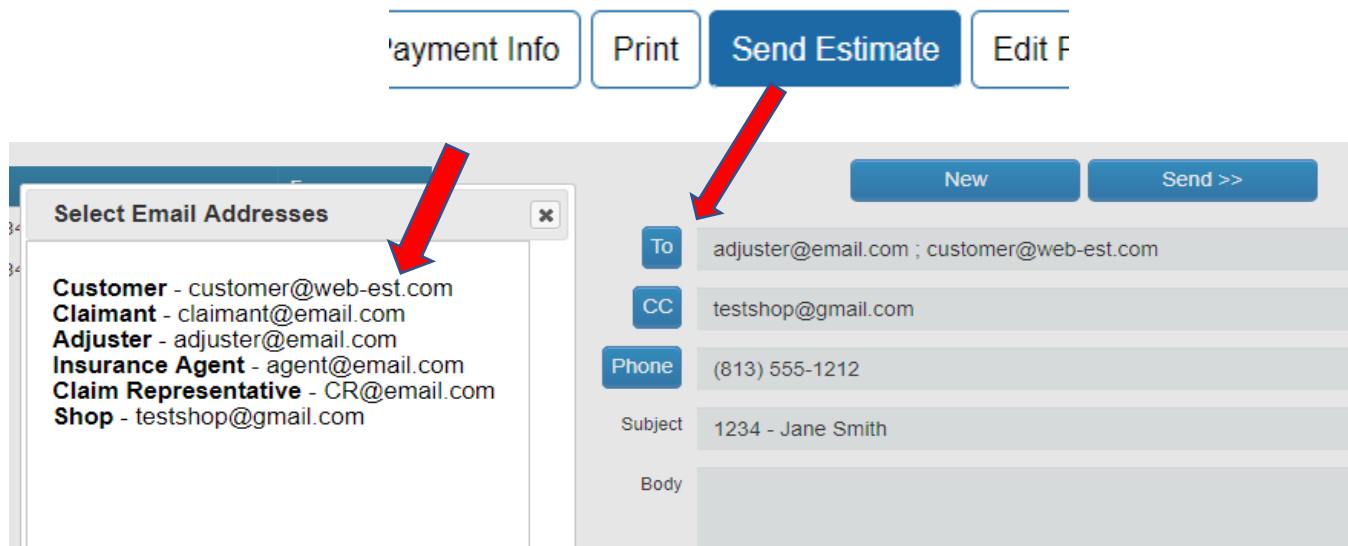
Phone (813) 555-1212

Subject 1234 - Jane Smith

Body

Select Email Addresses

- Customer - customer@web-est.com
- Claimant - claimant@email.com
- Adjuster - adjuster@email.com
- Insurance Agent - agent@email.com
- Claim Representative - CR@email.com
- Shop - testshop@gmail.com



1234 - Becky Nabors

Select Phone Numbers

- Customer - (813) 555-1212**
- Claimant - (456) 789-7890
- Adjuster - (813) 555-1212
- Insurance Agent - (813) 555-1212
- Claim Representative - (813) 555-1212
- Shop - (888) 932-3780

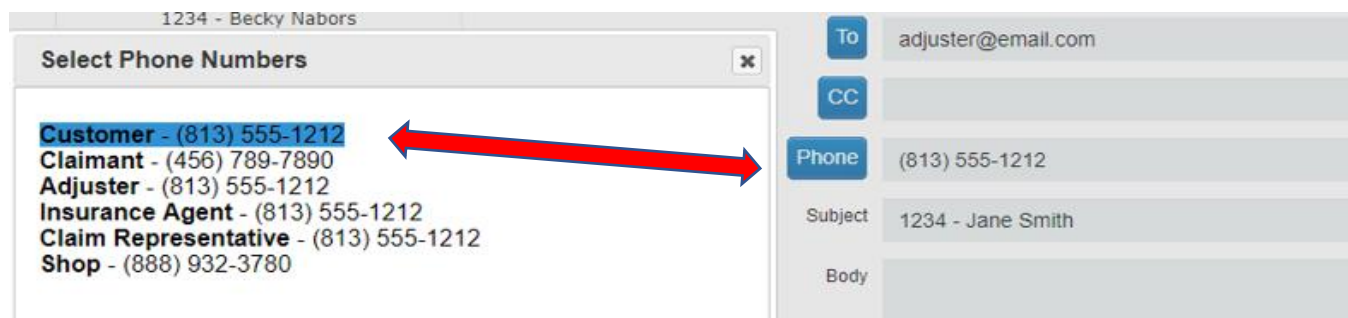
To adjuster@email.com

CC

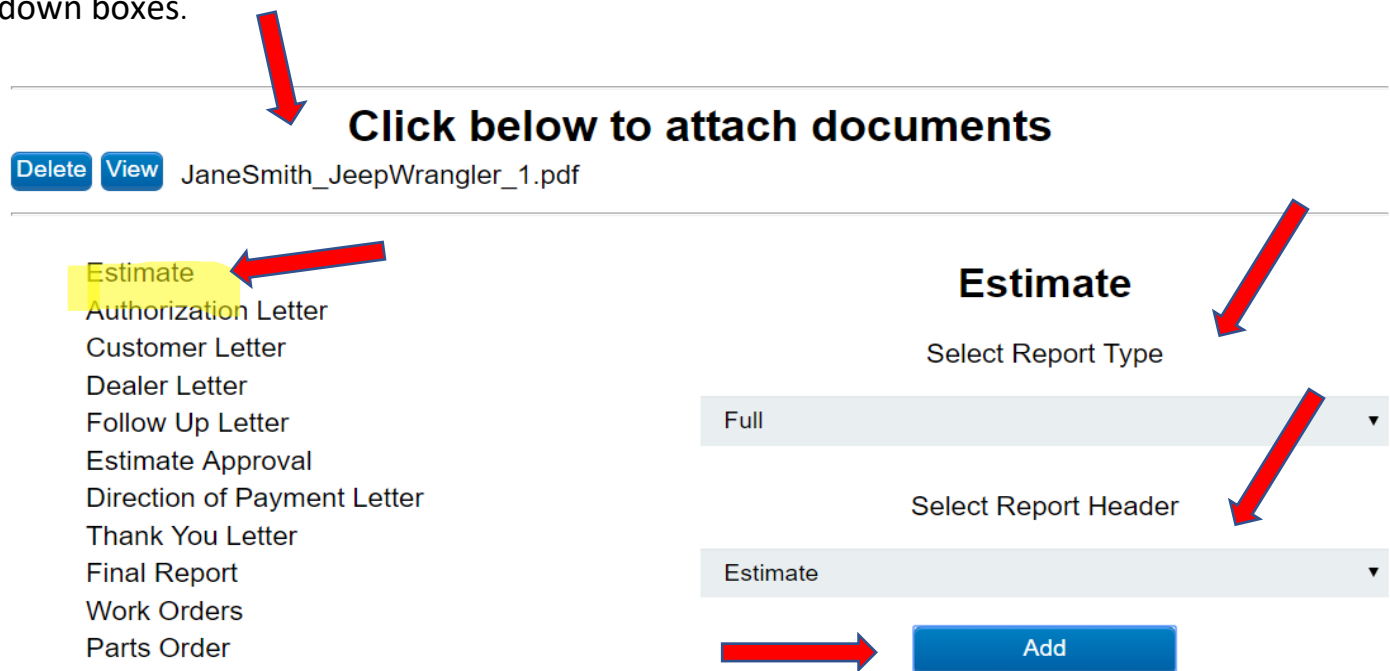
Phone (813) 555-1212

Subject 1234 - Jane Smith

Body



Then you will need to attach the estimate or whichever document to the email you are sending. Click on **Estimate** and then **click Add**. Once it is added you will see the estimate listed under the “**Click below to attach documents**” heading. You can also **View** or **Delete** it from this point. And before attaching, you may also select the REPORT TYPE or REPORT HEADER from the drop-down boxes.



Click below to attach documents

[Delete](#) [View](#) JaneSmith_JeepWrangler_1.pdf

Estimate

Authorization Letter
Customer Letter
Dealer Letter
Follow Up Letter
Estimate Approval
Direction of Payment Letter
Thank You Letter
Final Report
Work Orders
Parts Order

Select Report Type

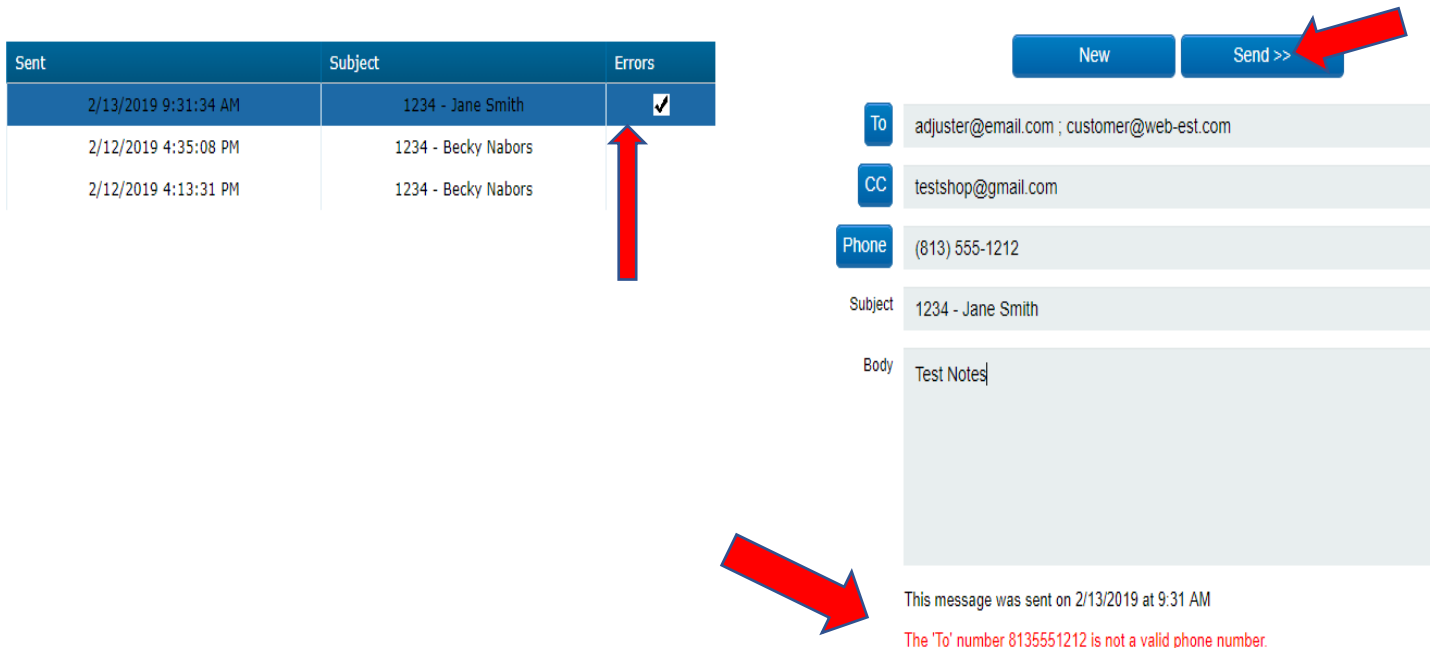
Full

Select Report Header

Estimate

Add

Once it is attached just scroll back up and click **SEND**. You will notice that the system will also tell you if you had any errors sending the message. This example tells us that the phone number was invalid. If you click on the **History** to the left it will also show you a **Date/Time Stamp** of when the email was sent for record tracking purposes. *This is used a lot of times when determining Rental Car responsibility.*



Sent	Subject	Errors
2/13/2019 9:31:34 AM	1234 - Jane Smith	<input checked="" type="checkbox"/>
2/12/2019 4:35:08 PM	1234 - Becky Nabors	
2/12/2019 4:13:31 PM	1234 - Becky Nabors	

New **Send >>**

To adjuster@email.com ; customer@web-est.com

CC testshop@gmail.com

Phone (813) 555-1212

Subject 1234 - Jane Smith

Body Test Notes

This message was sent on 2/13/2019 at 9:31 AM

The 'To' number 8135551212 is not a valid phone number.