WEB-EST
Software For Independent Body Shops

Pro-Estimator By Web-est

User Guide

Table of Contents

Getting Started

Log into **Pro-Estimator** using the credentials issued in your *Login E-mail*. All information must be entered exactly as printed on the e-mail. The password field **is** case sensitive. Please make sure you do not have your CAPS lock on.

If any problem is encountered while attempting to log into **Pro-Estimator**, or for any reason, please do not hesitate to call us for technical support. Our toll-free phone number is *(888) 932-3780 EXT 203* and the hours of operation are weekdays between *8:30 AM and 8:00 PM EST*.

Member Login

Login Name

Organization

Password
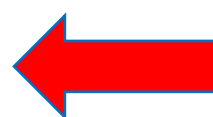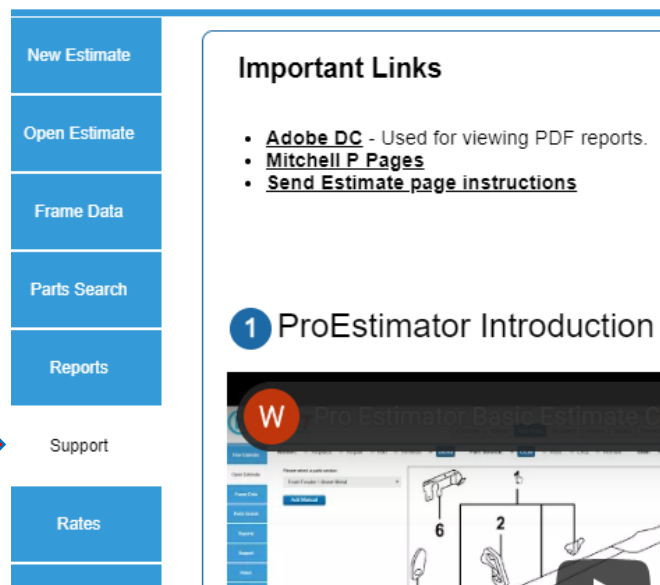
☐ Remember by Login Name and Organization

Login To ProEstimator

Forgot password?

Support

Upon your first login you will want to visit our "Support" tab on the left side menu.

Important Links

- **Adobe DC** - Used for viewing PDF reports.
- **Mitchell P Pages**
- **Send Estimate page instructions**

Please make sure you have Adobe DC downloaded to your device, so that you can *view PDF* documents. The link is provided for you on the *support page*. You will also find the Mitchell P Pages and multiple training tools for our website.

Rate Profiles
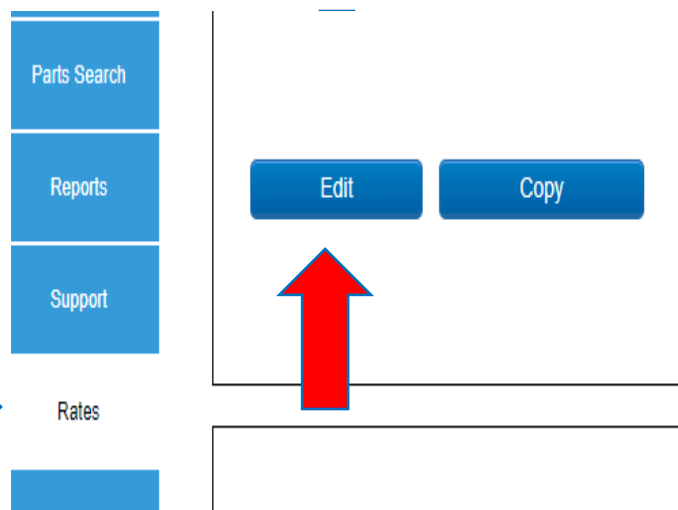
Next you will want to click on the "**Rates**" tab on the left side menu.

****If at any time you would prefer to have assistance setting up or changing a Rate Profile, DO NOT hesitate to contact us at** 888-932-3780 EXT 203 ****

Once in the **_Rates_** tab click the "**Edit**" button for the profile you would like to change.

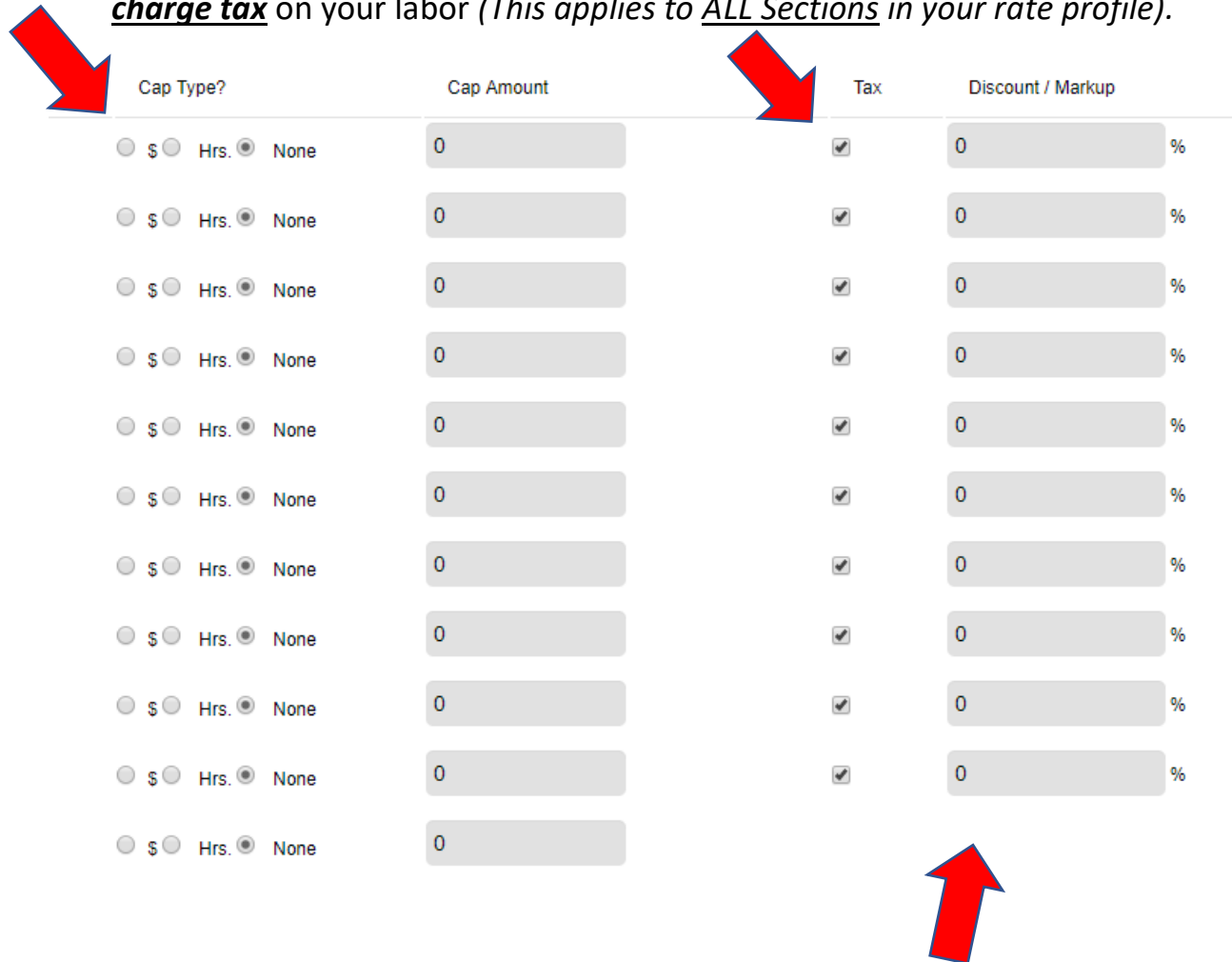Scroll down so that you can see Section 1 Labor. On the *left* side of this section enter or change your labor rates in the table. ***Labor rates for an operation may be included in the total for another operation by using the appropriate drop-down box in the rate table. *The example here will include the Clearcoat labor with the Paint labor in your totals and will charge the same rate per hour.*

1 Labor

For Dis

Type	Select other category to include in	Rate	
Body	▼	42	/ Hrs.
Paint		40	/ Hrs.
Mechanical	▼	40	/ Hrs.
Frame	▼	40	/ Hrs.
Structure	▼	40	/ Hrs.
Electrical	▼	40	/ Hrs.
Detail	▼	18	/ Hrs.
Cleanup	▼	10	/ Hrs.
Other	▼	15	/ Hrs.
Glass	▼	35	/ Hrs.
Clearcoat	Paint ▼		

Tip: Profile pages will be automatically saved when changing pages within Pro-Estimator. However, we recommend periodically clicking "Save" at the top of the page to ensure a back-up of information.

On the left of your rates you have options for "**Caps**". *Caps apply a limit* to the *total accrued* for the entry. Caps may be set to hours or a dollar amount. To the right of caps is the **Tax column**. ***Put a check*** in the appropriate boxes ***if you charge tax*** on your labor *(This applies to ALL Sections in your rate profile).*

Cap Type?			Cap Amount	Tax	Discount / Markup	
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0	☑	0	%
○ $ ○ Hrs. ◉ None			0			

"**Discount/Markup**" If a *discount* is to be applied, enter a *minus sign before the number* for the percentage of discount. A *markup* is accomplished by *entering the number* for the percentage alone. This enables the estimator to *enter the **actual*** wholesale or jobber part cost while **Pro-Estimator** calculates resale charges and will reflect ***on the printed estimate***.

Tip: Profile pages will be automatically saved when changing pages within Pro-Estimator. However, we recommend periodically clicking "Save" at the top of the page to ensure a back-up of information.

Scroll down to ==**Section 2 Supplies**==. *Supplies* may be set up to have an hourly charge. Like labor changes, supply totals may be included with another by using the drop-down box in that table. *Caps*, *Tax*, and *Discount* work the same as the Labor rate box above.

2 Supplies

Apply caps ◉ before ○ after being included.
For Discount/Markup, enter 10 for 10% markup, -10 for 10% discount.

Type	Rate		Cap Type?			Cap Amount	Tax	Discount / Markup	
Body	18	/hr.	○ $ ○ Hrs. ◉ None			0	☑	0	%
Paint	18	/hr.	○ $ ○ Hrs. ◉ None			0	☑	0	%
Clearcoat	Paint ▼		○ $ ○ Hrs. ◉ None			3.5			%

Scroll down to ==**Section 3 Parts**==. *Caps, Tax,* and *Discount* work the same as previous sections.

3 Parts

Type	Cap?	Cap Amount	Tax	Discount / Markup	
Retail	☐	0	☑ Taxable	0	%
LKQ	☐	0	☑ Taxable	0	%
Aftermarket	☐	0	☑ Taxable	0	%
Reman	☐	0	☑ Taxable	0	%
Other	☐	0	☑ Taxable	0	%

Once you have made all your changes scroll up and click **"Save"**

Tip: Profile pages will be automatically saved when changing pages within Pro-Estimator. However, we recommend periodically clicking "Save" at the top of the page to ensure a back-up of information.

Paint Finish

| Rates | Paint Finish | Print Options | Taxes | Preset Charges |

Profile Name: Default

Options for *adjacent panels*, *paint set up*, *blending*, edging, and *related operations* are included on this page. Default variables have been preset (and should ***always*** be set to the formulas below), but should be checked for accuracy and saved using the save button at the top of the page.

1 Overlap Panel Deduction Times

Adjacent		Non-Adjacent	
0.4	Hrs.	0.2	Hrs.

☑ Allow Deductions
☑ Allow the Adding of Edging and Interior Surface times
☑ Show Paint Options Box when Replacing Parts

2 Paint and Finish Setup

	1st Panel		Additional Panels	
Add for 2 Stage:	40	%	20	%
Add for 3 Stage:	70	%	40	%
Add for 2 Tone:	50	%	30	%

	Amount	
Add for Blend	50	%
Add For 3 Stage / 2 Tone Blend	70	%
Add for Underside:	50	%
Add for Edging:	0.5	> Hrs.

3 Additional Options

	Clearcoat	2 Tone
Inner Panels:	☑	☑
Edges and Lock Pillars:	☑	☑
Undersides and Interior Surfaces:	☑	☑

Print Options
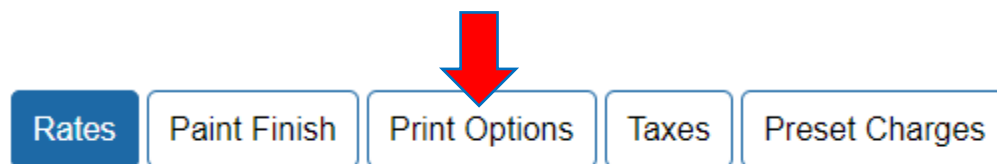
Profile Name: Default

The next section of *Rate Profiles* includes options for printing estimate reports. The *look* and *content* of printed reports may be customized by clicking the "Printing" button and selecting these options. These printing options will be stored separately for different rate profiles. ***TIP: Make sure your image quality is always set to low*** *otherwise the photos could be too large for emailing.*

1 Estimate Report Options

☐ No Header Logo
☐ No Insurance Section
☐ No Photo Page
☑ External Notes
☐ User Larger Fonts

☑ Print Estimate Number (Est#)
☑ Print ID (ID#)
☐ Print Payment Info
☐ Print report using dollars instead of labor time.
☐ Print Estimator.
☐ Print Vendors

Select the Image Quality
◉ Low ○ Medium ○ High

Select which *format* you would like your contact information to *print* on estimates

2 Contact Info Print View

Select how "Contact Information" displays in report.
○ Line Format

◉ Label Format

Veh. Info:	2003 Honda Accord EX, Ext. Color:, Ext. Color: Condition: , VIN#:
Ins. Comp.:	26263 Erie Insurance Company / 100 Erie Fax Number: 555-333-4444
Estimator:	Tim Baker
Claimant:	Tom Sawyer / 123 XYZ Lane / Rio, AL 334
Policy Holder:	Ghost Rider / 2112 Rush Road / LimeLigh 478-304-4283 / 0

Vehicle Info	VIN
2001 Porsche 911 Carrera 4	WP0CA29931S6502:

Owner	Insurance Company
John Doe	Erie Insurance Company
400 Combo Lane	100 Erie Ins Pl.
Columbus, OH 43215	Erie, PA 16530
Work Phone: 614-555-1234	Fax Number: 555-333-4444

At the bottom of the "**Printing**" tab, estimate *report footer text* may be entered to create a disclaimer, warranty, or any other information to be printed on all estimate reports. *We HIGHLY recommend that you use the Estimate Report Notes to write a disclaimer in regards to part prices varying from day to day*.

③ Estimate Report Notes

Enter notes to display in report footer. (Max. 4000 Characters)

Taxes

| Rates | Paint Finish | Print Options | Taxes | Preset Charges |

Profile Name: Default

① Sales Tax

Please enter your *sales tax* rate here.

Tax Rate	6
Additional Tax Levels Amount 2nd Tax Rate Begins.	5000
2nd Tax Rate	5

Preset Charges

| Rates | Paint Finish | Print Options | Taxes | Preset Charges |

Profile Name: Default

The final section of Rate Profiles deals with "**Preset Charges**". Adding a *preset charge* from this page *creates an entry in a dropdown box* near the top of the *manual entry page*. Some common uses for preset charges would be *hazardous materials disposal, mask car for paint*, *setup for frame pull*, and *tint base/clear*. Fields on this page are optional and depend upon the operation specified for the preset item being created. Before manually entering your own, **scroll to the bottom of this page you can edit any of our suggested Preset charges** to fit the *flat rate price* or *hourly charge* that is correct for your business.

	Line #	Status	Group	Op	Operation Description	Part Name	Part #	Part Price
Edit		(0)	null	Other	Other Hazardous Waste Remove			3.00
Edit		(0)	null	Other	Other Detail/Clean Vehicle			25.00
Edit		(0)	null	Other	Other Flex Additive			15.00

To *manually* enter your own *Preset Charges* fill in the fields

Operation and Description

Part Price

1 Add Charge

Operation ☐ Sublet Align ▼

Operation Description Front End Alignment

Part Description

Part Source OEM ▼   Part Number

Vendor ▼

Part Price $ 48.00   Quantity 1

Betterment Type None ▼

☐ This item is part of an overhaul

Section ---Select Section--- ▼

2 Add Labor

Labor Type Mechanical ▼   Labor Time 0

Other Charges $ Other Type ▼

3 Add Paint

Paint Type No Paint ▼

If you want to charge by the hour instead of a set price you can use Section 2 for Labor or Other Charges or Section 3 for Paint, if needed

Manage Estimates

The "**Manage Estimates**" page will be shown upon successful login. The "**Manage Estimates**" page defaults to show all the recent estimates written in the last *60 days*. You are able to sort this list using the *other options* listed.
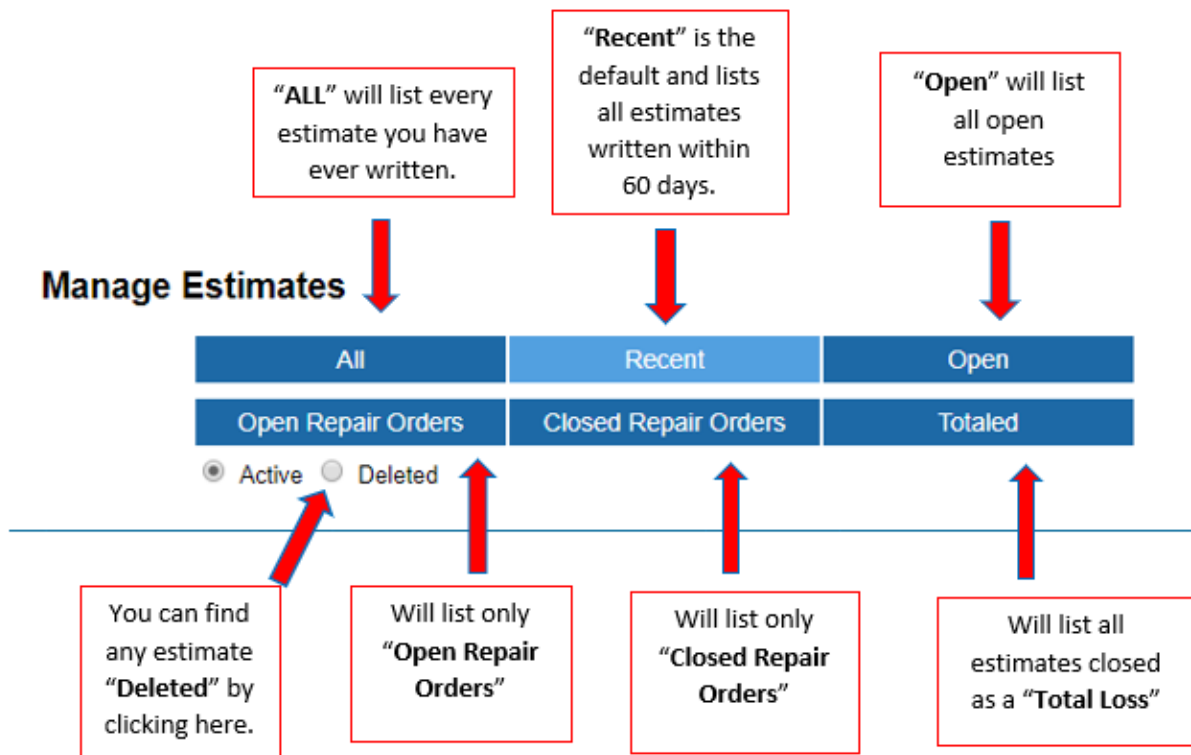
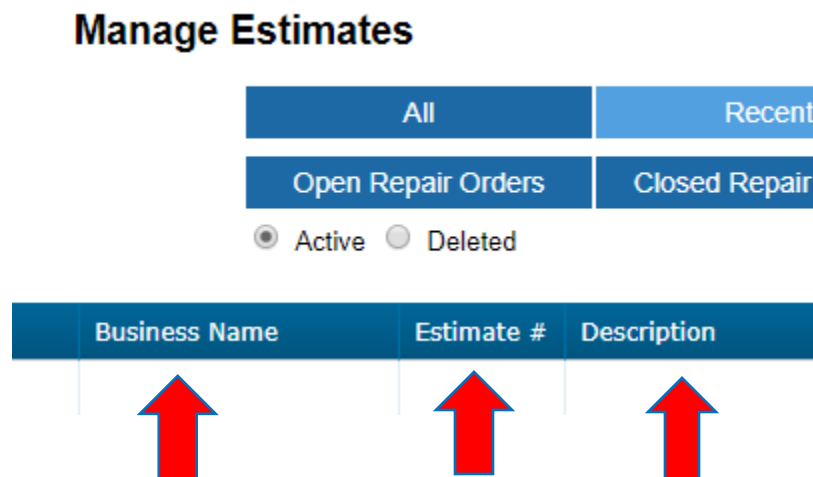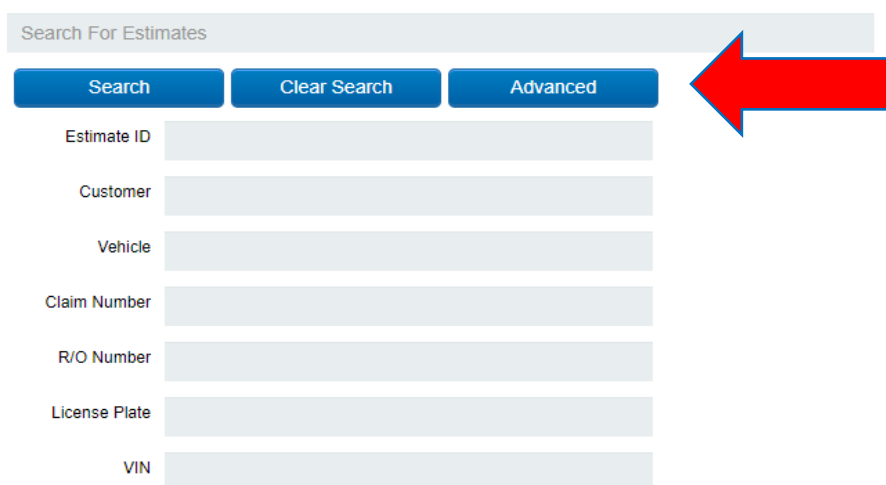You can also organize your "**Manage Estimate**" list using the column headers. Just click on the header of the column you would like to organize: *Name*, *Vehicle*, *Business Name, Estimate #, Description, Created*, or *Last Viewed*.

Manage Estimates

All	Recent
Open Repair Orders	Closed Repair

◉ Active ○ Deleted

Business Name	Estimate #	Description

On the top left side of the "**Manage Estimates**" screen there is a "*Search*" feature. You can *search* by any of the basic column headers (example: *Name or Vehicle*)

Search For Estimates

Search	Clear Search	Advanced

If you select "**Advanced**" more options will populate to search for an estimate.

Search For Estimates

Search	Clear Search	Advanced

Estimate ID

Customer

Vehicle

Claim Number

R/O Number

License Plate

VIN

Open		Name
6979630	Print	
6990329	Print	

To the *left* of each estimate on your list you can "Open" an estimate by selecting the *blue button* with the *ID#* listed on it **OR** you can select the "Print" button to view / print the estimate in PDF.

To the *right* of each estimate on your list you can "Copy" the estimate (*which will duplicate the estimate for you*) OR you can select "delete" on the line of the estimate.
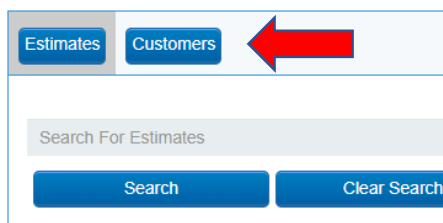
Copy	Delete	☐
Copy	Delete	☐

New Estimate

Open Estimate

Frame Data

Parts Search

Reports

Support

Rates

Vendors

Settings

Logout
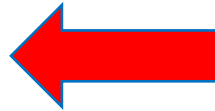
You can always come back to the "**Manage Estimates**" page by selecting "*Open Estimate*" on your Left Side Menu.
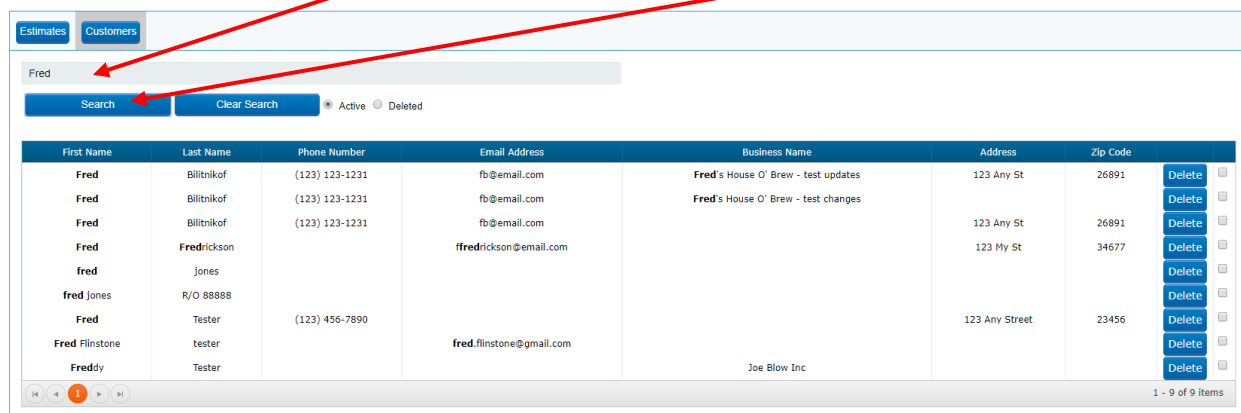
Saved Customer List

Web-Est is excited to give you more control of your *Saved Customer information*.


When you log in you will see the *Customer* option on the top of your *Manage Estimate Screen*. Click on the "*Customers Button"* to go to your *Saved Customer List*.

You can search for a specific customer by entering something simple into the *Search field* and selecting "*Search"*.

You may have more than one saved Customer under the same name and you can delete the multiples by selecting "delete" next to the line. ***This will NOT delete any estimates you have written for that customer.***

You can click on a *Saved Customer line* to populate the *Saved Customer Information* below the *Customer* grid.
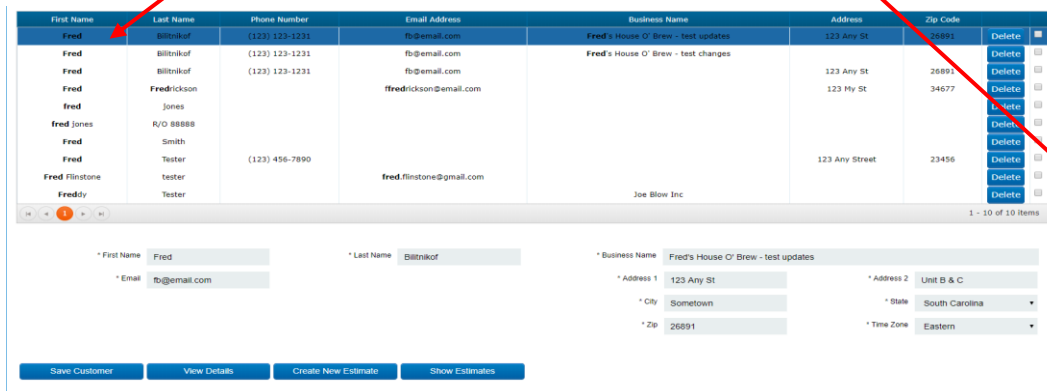
The *Customer Information* can be *edited* or *updated* by entering the correct information in the fields and clicking the *Save Customer Button*.

To view additional Customer Information click on the *View Details* Button.

All of the **customer information** will open.

You can *edit* or *update* any fields and then click the *Save Customer button*.

To *view* or *open* estimates written for the customer click on *Show Estimates*.

To begin a *New Estimate* for that Customer you can select *Create New Estimate*.
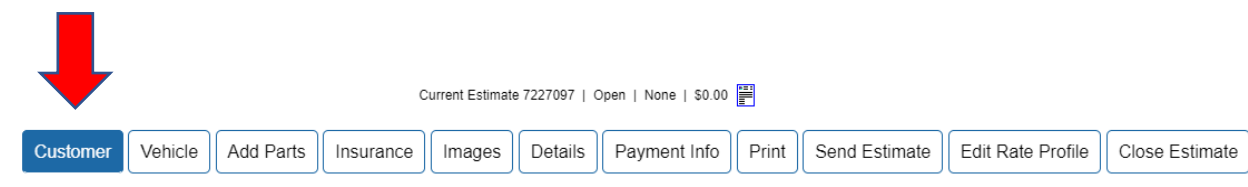
Writing an Estimate

Click "**New Estimate**"
to begin writing an estimate.

When writing an estimate you will navigate using the tabs along the top. The only tab that **is** *REQUIRED* in order to write the estimate is the **VEHICLE** tab, but this guide will do a summary of each tab so that you can learn to keep detailed records for your business.
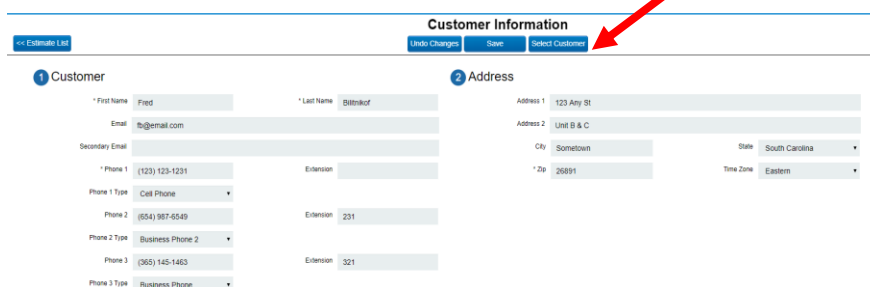
Customer Tab

The *customer tab* is where you enter all of the customer information. *Name*, *phone*, *address* etc.

Current Estimate 7227097 | Open | None | $0.00

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

The Customer information is **NOT** required to write your estimate. When ready simply fill in the fields you would like to save for the customer.

The system will _automatically_ save the customer information entered on your estimate into your **_Saved Customer List._** If you are writing an estimate for a customer you have worked with before click on _Select Customer_.

Once you click the _Select Customer_ button you will be taken to your **_Saved Customer List_**. Use the **_Search_** field to enter the _customers name_ or a _simple_ search to locate the customer.

Once you have found the customer on your list **_click on it to highlight_** the customer you want and click _Select_ at the bottom and the system will take you back to your estimate and the customer information will be populated for you.

Vehicle Tab

Current Estimate 7228221 | Open | Test McTesterson | 2016 GMC -1500 Sierra SLT | 3GTU2NEC9GG108568 | $0.00

| Customer | **Vehicle** | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

The "**vehicle**" tab is the only tab that is **required** in order to write your estimate. You must have vehicle info filled in (in) order for the system to pull any data to write your estimate.

There are 3 ways to enter the vehicle information into the system.

1. You can enter a *License No* and *select the State* and click **Decode**

Lookup VIN from License

License No. ABC123

License State Alabama ▼

Decode

2. You can enter the 17 character *VIN number* and click **Decode**

Vehicle Id Number

Enter Vin 3GTU2NEC9GG108568

Decode

3. The License and VIN decoders are there to assist in filling out the *REQUIRED* fields in section 1, but you can also just use the dropdown menus to select the vehicle information. In order for the system to pull the data on the vehicle all the fields with the **red asterisks** must be selected *Year, Make, Model, Trim*, and *Body* Type. Also you can change the *paint type* if needed.

① Year, Make, Model

Year * 2016 ▼   Make * GMC ▼

Model * 1500 Sierra ▼   Trim * SLT ▼

Body Type * 4 Door Crew Cab 153 ▼   Paint Type 2 Stage ▼

Click Here for Frame Dimensions

Add Parts - Graphical

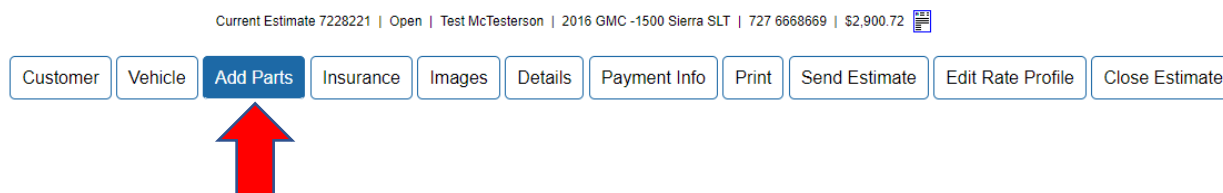Current Estimate 7228221 | Open | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $2,900.72

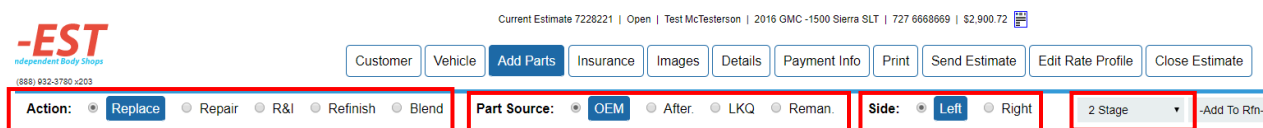| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

The *Add Parts* screen is where you actually write the estimate. Depending on which device you are this screen may look slightly different, but the functions are exactly the same. *If you are on an Ipad or phone your action items may be drop down menus instead of the bubble selections*. For this manual we are using the view on a *computer*.

Along the top you will find your ***Action*** selections*.*

-EST
ndependent Body Shops
(888) 932-3780 x203

Current Estimate 7228221 | Open | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $2,900.72

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

Action: ○ Replace ○ Repair ○ R&I ○ Refinish ○ Blend   **Part Source:** ○ OEM ○ After. ○ LKQ ○ Reman.   **Side:** ○ Left ○ Right   [2 Stage ▼] -Add To Rfn-

For each line you must tell the system what **Action, Part Source, and which side of the vehicle you are working on**. Simply select which one you are wanting by ***clicking the bubble next to it*** (*or select from the drop down menu if using a handheld device*).

Action: ○ Replace ○ Repair ○ R&I ○ Refinish ○ Blend
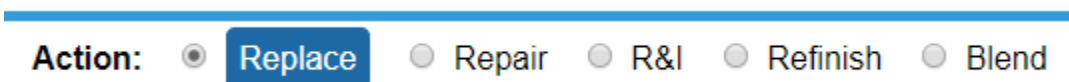
Replace – Use if you are replacing the part

Repair – Use if you are Repairing a part

R & I – Use if you are Removing & Installing the part back

Refinish- Use if you are painting a part

Blend – Use if you are blending paint to match

If you are **Replacing** a part you need to select the **Part Source**. Our system has all of the **OEM** pricing and will have the prices for **Aftermarket** parts, *if you have vendors selected for **Aftermarket** in our **Vendor** section (this was discussed earlier in the manual)*. **LKQ** and **Remanufactured** will not have pricing and you will have to *manually* enter the price once you get it from your vendor. Again you just **click the bubble next** to the **Part Source** you would like (*or select them in the dropdown menu on a handheld device*).

Part Source: ● OEM ○ After. ○ LKQ ○ Reman.
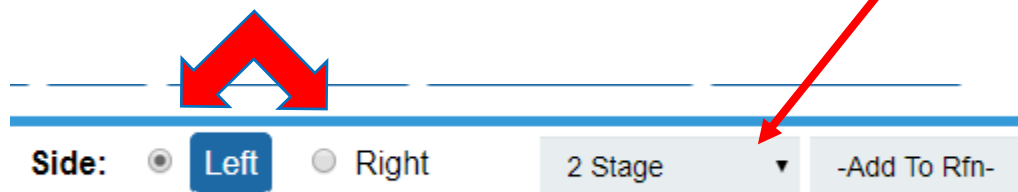
OEM – Original Equipment Manufacturer – New parts from the original manufacturer of the vehicle.

Aftermarket – New parts that are not made from the original manufacturer of the vehicle.

LKQ – Used parts salvaged from another vehicle.

Remanufactured – Parts removed from another vehicle that have been repaired and / or refinished.

Then you must let the system know which **Side** of the vehicle you are working on. *Also note that you can change the **Paint Type** here.*

Side: ● Left ○ Right | 2 Stage ▼ | -Add To Rfn- ▼

You can also use your mouse to tell the system Right or Left side. When scrolling on the image if you *Right mouse click on the number* it will choose the **Right side** and if you *Left mouse click on the number* it will select the **Left side** of the vehicle.

Once you have those *action items* selected it is time to select your part. You can select the **Section** you are working on in the drop-down menu to populate the graphic and the data.

Please select a parts section

---Select Section--- ⬅ Make a Section Selection

Please note that you can select a **Manual entry** and **PDR button**. *These will be explained later in the manual*.

Add Manual

PDR

Once you have *selected the section* you will see a *graphical image* to the right. The *graphical image* is scrollable so you may need to scroll up or down to see all of the parts in that section.
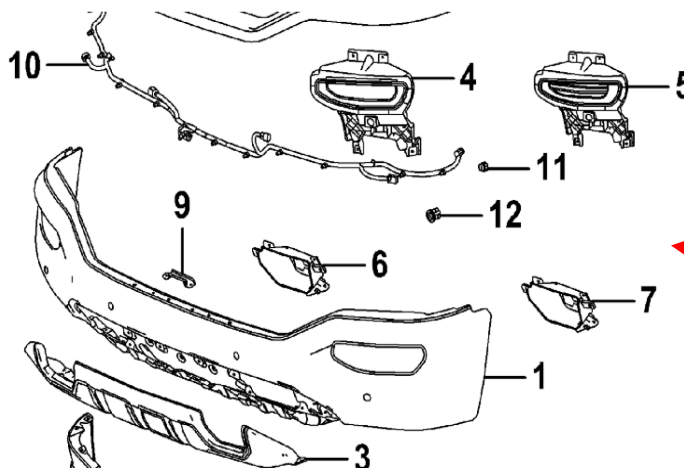
Please select a parts section

Front Bumper \ Chrome 2016-19
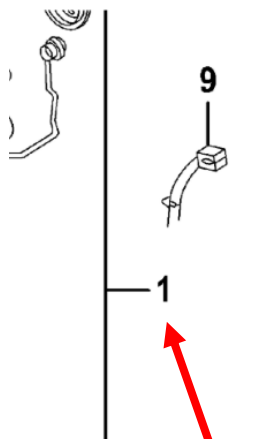
Section Selected

Add Manual

Parts & Labor

PDR

Graphical Image appears

When you *scroll over one of the numbers* on the image to the *right* it will populate the **Part Details** for you.

Part number

Description (*part name*)

OEM Price

Labor & Paint times

Notes – *what is included or not included – Overlap details*

Click the **number** on the image for the part you need to *add* the *operation/part* to the estimate.

A *Part Prompt Window* will pop up on your screen, *read the comments* and click the **Add** button to select the correct part needed.

Multiple part numbers exist. Please select the part to add:

Action	Part #	Description	Comment
Add	23496235	GRILLE ASSEMBLY	Grille Assy (Chrome w/Chrome Insert) (2016-2019)
Add	23496234	GRILLE ASSEMBLY	Grille Assy (Chrome w/o Chrome Insert) (2016-2019)
Add	84065168	GRILLE ASSEMBLY	Grille Assy (Paint to Match w/Elevation Edition Pkg) (2016-2019)
Add		GRILLE ASSEMBLY	Grille Assy (Paint to Match w/o Elevation Edition Pkg) (2016-2019)
Add	84056783	GRILLE ASSEMBLY	Grille Assy (Paint to Match w/o Elevation Edition Pkg Midnight Special Edition Pkg) (2016-2018)
Add	84056784	GRILLE ASSEMBLY	Grille Assy (Paint to Match w/o Elevation Edition Pkg Redline Pkg) (2017-2018)

If you are selecting an *Aftermarket* part, you will then get the *Part Source Prompt* to select the ***Aftermarket part / price / vendor*** you want. Click **Select** to add it to your estimate.

Select Part and Source:

Close NonOem Window		
	Price	Vendor Name
Select	876.00	KEYSTONE - TAMPA, FL
Select	876.00	KEYSTONE - VANCOUVER, WA
Select	876.00	KEYSTONE - RENTON, WA

If the part has paint times on ***Replacements,*** you will receive the **Paint Prompt Box.** The system will auto populate times that you can change if needed.

If you need to include *Blend*, *Edging*, or *Underside* select the box to ***Include*** to have it added to your estimate line

Paint Options:

Paint Type	Paint Time		Panel Type
2 Stage	1.2	Hrs.	

2 Tone/3 Stage Hrs.	Clearcoat Time Hrs.	Blend Time Hrs.	Edging Time Hrs.	Underside Time Hrs
0	0.5	0.6	0.5	0.6
☐ Include?	☑ Include?	☐ Include?	☐ Include?	☐ Include?
☐ Locked?	☐ Locked?	☐ Locked?	☐ Locked?	☐ Locked?

Locking an item will not allow the programs automatic calculations to change the value.

Click **OK** to add this to your estimate.

OK   Cancel

If you are doing a **Repair**, _after_ you select the correct part on _the Part Window_ you will have the Repair Prompt Box populate. **_Enter your Repair time here_**.

You can **_include the R&I_** time for this **Repair** by **_clicking the checkbox_** and this time is editable if needed.

Paint Options are in the 2nd window of the prompt. You can edit and / or add any **_Blend, Edging, or Underside_** needed by selected **_Included_** below it.

Click **OK** to add the **_Repair_** line to your estimate.

As you add lines to your estimate, they will be visible at the bottom of your screen. **_If you move your mouse to the top blue line_** you can move this **_up or down_** to see **_more or less_** of your lines.

You can **Edit** a line by **_clicking Edit_** on that line item. You can **Delete** a line by **_clicking Delete_** on that line item.

If a *Graphical Image* is missing on a section or if you are not finding what you are looking for in the section you have selected. You can select the **Parts & Labor** Button.

Please select a parts section

Front Bumper \ Painted 2016-19

Add Manual

Parts & Labor

PDR

This will provide you with **ALL the Data** on this section of the vehicle written out. You can scroll through and ***Add / Edit / Remove*** anything from this window. This is also a good way to look for Notes of what is included with each operation (*overlaps*). Once done ***Click Close P&L Window*** on top or bottom of this window to close it.

Close Parts & Labor Window		Part #	Description	Comment	Price	Labor	Notes	Remove
Remove			GRILLE	Refinish Grille Assy (2016-2019)		1.2 Clearcoat	Part Included in Clear Coat Application Includes Necessary Masking	Remove
Add			GRILLE ASSY	R&I Grille Assy (2016-2019)		0.4 Body	Includes R&I/R&R Upper Radiator Shield	Remove
Add			GRILLE	R&R Grille Assy (2016-2019)		0.6 Body	Includes R&I/R&R Upper Radiator Shield	Remove
Edit	1	23496235	GRILLE ASSEMBLY	Grille Assy (Chrome w/Chrome Insert) (2016-2019)	$899.95	0.6 Body	Includes R&I/R&R Upper Radiator Shield	Remove
Add	1	23496234	GRILLE ASSEMBLY	Grille Assy (Chrome w/o Chrome Insert) (2016-2019	$833.93	0.6 Body	Includes R&I/R&R Upper Radiator Shield	Remove

Add Parts - Manual

Please select a parts section

---Select Section---

Click on the **Add Manual** button

Add Manual

PDR

The manual item entry screen provides all the necessary fields to *add parts*, *labor*, and *paint times* that cannot be added through the graphical interface. The manual screen is separated into **4 sections** to assist in creating your line items accurately.

Section 1 is where you can add a part, description of the labor charge for **Section 2** (*below*), or select a Preset Charge (*instructions for Preset Charges are in the Support tab of your program*). Fill in the appropriate boxes / drop-down menus.

1 Add Charge

Select a Preset Charge	
--or complete the form to add a part--	
Operation ☐ Sublet Replace ▼	
Operation Description	
Part Number or Description	Search

Part Description	
Part Source OEM ▼	Part Number
Vendor ---Select Vendor---	
Part Price $	Quantity 1
Betterment Type None ▼	
☐ This item is part of an overhaul	
Section ---Select Section---	

Section 2 is to add Labor to the line item. Select the ***Labor Type*** in the drop-down menu and then enter the ***Labor Time***.

2 Add Labor

Labor Type	Frame ▼	Labor Time	1
Other Charges $	5.00	Other Type	Nontaxed ▼

And / Or you can also enter a ***flat rate charge*** using the ***Other Charges*** box, but you **must** also select the ***Other Type*** for the charge to be added to the line. The ***Other Charges*** box is also where you can add a discount or a negative amount (*exp. -25.00, will subtract $25.00 from the estimate*).

Section 3 is to add any ***Paint Time*** to your line item. Select your ***Paint Type*** in the drop-down menu and then enter your ***Paint Time***.

When you enter the ***Paint Time*** the system will auto calculate the additional times for *Clearcoat, Blend, Edging, and Underside* click the ***Include check box*** for any of the additional times you need.

Section 4 is where you can add *Notes* to the line item.

***Customer Notes* will** print on the estimate.

***Shop Notes* will not** print on the estimate.

After you have entered all of the information and charges you must click **Add** at the top of the page.

Insurance Tab

Current Estimate 7228221 | Open | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $4,801.37

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

The *Insurance* tab is not required for you to fill out in order to create an estimate. Fill in as many fields as you would like to keep records of or to have print on the estimate.

1 Insurance Information

Insurance Company Name	Crash Insurance Company
Existing Insurance Company	-----Select Insurance Companies-----
☑ Save Insurance Profile	
Agent First Name	Roger
Agent Last Name	McDonald
Agent Phone	
Extension	
Agent Fax	
Agent Email	test@adjuster.com
Adjuster First Name	
Adjuster Last Name	
Adjuster Phone	
Extension	
Adjuster Fax	
Adjuster Email	test@adjuster.com

Claim Rep First Name	Testy
Claim Rep Last Name	
Claim Rep Phone	(124) 456-7894
Extension	
Claim Rep Fax	
Claim Rep Email	test@adjuster.com
Policy Number	1245784
Claim Number	Test1234
Deductible $	500.00
Coverage Type	Comprehensive
Date of Loss	06/27/2019

The *Claimant* and *Insured* sections can be filled in manually or you can also select the **box for Same as Owner** and the system will auto populate the fields you have previously entered in the **Customer** tab.

2 Claimant
☐ Same As Owner

|	
Existing Customer	-----Select Existing Customer-----
Claimant First Name	
Claimant Last Name	
Claimant Mobile	
Extension	
Claimant Email	
Claimant Business Name	
Claimant Address 1	
Claimant Address 2	
Claimant City	
State	-----Select State-----
Zip	
	Eastern

3 Insured
☑ Same As Owner

Images

Current Estimate 7228221 | Open | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $4,801.37

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

Add Images

Choose File   No file chosen

To upload images to the estimate go to the *Images Tab* and click on ***Choose File***.
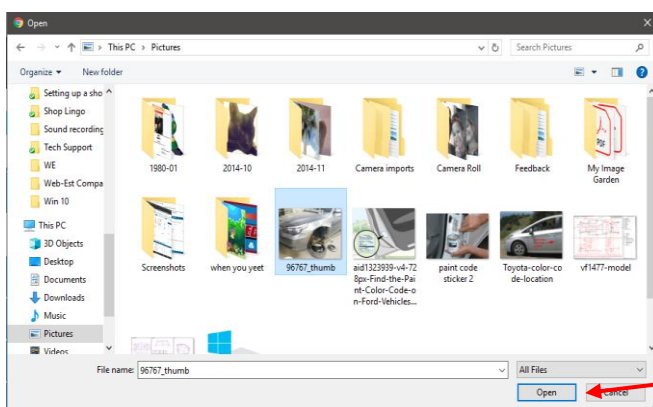

A prompt box will open for you to search your computer for the images. ***Select 1 photo*** at a time and click ***Open***.

Add Images

Choose File   No file chosen

The image will load onto the images page. Below each image you can use the ***drop-down*** menu to select the **section** of the vehicle in the photo and add a **note** if needed and click ***Save***. If you upload the wrong photo or want to delete the photo click the ***Delete*** button.
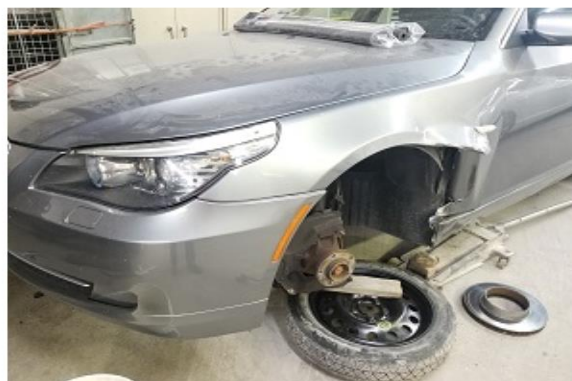
LT Fender ▼

Test Note

Save

Delete

Images are automatically attached to the PDF estimate, if you Print or Send the PDF the images are already included.

Details Tab

Current Estimate 7228221 | Open | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $4,801.37

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

The *Details tab* is where you can edit many of the details of the estimate.

Section 1 is **Estimate Info**.

You can switch between rate profiles.

Change the header from estimate to invoice, final bill etc. by using the drop-down menu

Estimate Description does print on the estimate, and will show on the Manage Estimate screen (exp: vehicle color)

You can change the name of the estimator to print on the estimate by selecting them in the drop-down menu.

Notes can be added here, but will not print on the actual PDF estimate, unless you select the checkmark to Include Notes in Estimate Report.

Add an inspection date to the estimate

① Estimate Info

Rate Profile	Default
Select Report Header	Estimate
Estimate Description	
Select Estimator	Testy Tester
Estimate Location	
Estimate Notes	These notes will print on the bottom of the estimate if you have the check box below selected.

☑ Include Notes in Estimate Report

Purchase Order Number	
Inspection Date		Assignment Date	

Section 2 on the **Details** tab is *Job Status*.

Use the *drop-down menu* to select the *Job Status* you want to create a *repair order* or *close a repair order* and then click the *Change Button*.
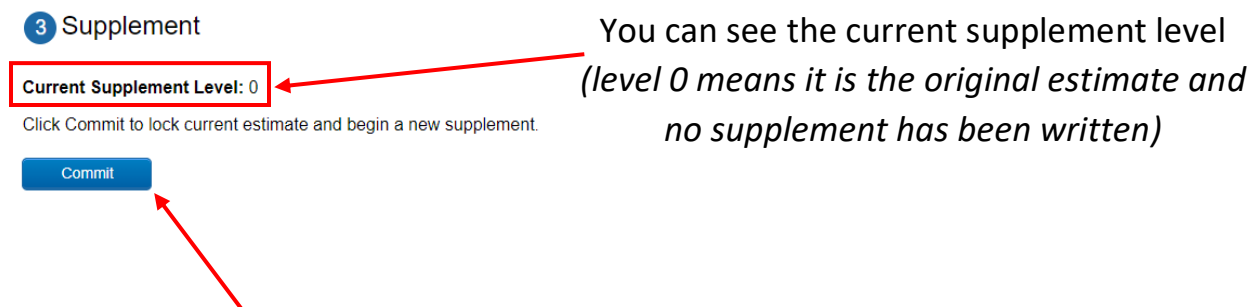
② Job Status

Repair Order #	10006
Change Status	Closed Repair Order ▼

Change

Repair Order	6/27/2019 9:39:42 PM

Section 3 is creating a *Supplement*.

③ Supplement

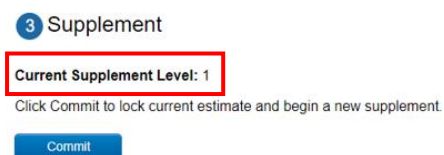**Current Supplement Level: 0**

Click Commit to lock current estimate and begin a new supplement.

[Commit]

You can see the current supplement level *(level 0 means it is the original estimate and no supplement has been written)*

Click the *Commit Button* to lock your original estimate and create a supplement.

This will change your *Supplement* level and you can go to the **Add Parts** tab to begin writing your estimate.

③ Supplement

Current Supplement Level: 1

Click Commit to lock current estimate and begin a new supplement.

[Commit]

Please see our How to Create a Supplement Guide in the **Support** tab in your system for full instructions on writing a supplement

Payment Tab

Current Estimate 7228221 | Repair Order 10006 | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $4,801.37

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

After an estimate has been written you can utilize the *Payment* tab for customers who are making payments for their repairs.

Use the **drop-down boxes** and enter information into the needed **fields** and then click **Save**.

Payment Information

Clear Form   Save

Who Pays	Customer		Name	Date	Memo	Amount
Payee Name	Test McTesterson	Delete Edit	Test McTesterson	6/27/2019		$1,000.00
Payment Type	Check	Delete Edit	Test McTesterson	6/27/2019	First Installment	$500.00
Amount $	1,000.00				Estimate Total:	$4,801.37
Check Number	1235				- Total Paid:	$1,500.00
Date	06/27/2019				= Total Remaining:	$3,301.37
Memo						

After you Save the information the **summary** will appear on the left hand side. The system will calculate the **payments made** and the **remaining balance** for you. If you have the **Print Payment Option** selected in your **Rate Profile** (*print options*) then this will print below your estimate and can serve as a receipt of payment and provide the customer with the remaining balance.

Feel free to contact us if the payment is not printing, we will be happy to assist in changing your settings for you

Print Tab

You can *view* or *print* the PDF estimate at any time by clicking on the
Quick Print Icon

Current Estimate 7228221 | Repair Order 10006 | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $4,801.97

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |

Print Estimate

Save   Print as PDF

When on the *Print* tab you can click on *Print as PDF*. The PDF will open in it's own window on your computer. *(If you have a pop up blocker it may prevent the window from opening, look for this to allow pop ups from our site.)*

If you are using the FireFox Browser to get on the internet and the PDF preview does not open, please visit our Support Tab to make sure your FireFox browser is allowing Adobe to open your PDF's

Select Report Type   Full

Estimate Description

Select Report Header   Repair Order

The *Print* tab also has options for you to select the **Report Type** and the **Report Header**, *using the drop-down menus* to select.

Report History

Sent Time Stamp	Email	Report	Delete
6/27/2019 7:42:34 PM		◉	🗑
6/27/2019 7:42:02 PM		◉	🗑
6/27/2019 6:43:28 PM		◉	🗑
6/27/2019 6:42:50 PM		◉	🗑
5/31/2019 4:04:01 PM		◉	🗑

Every time you click *Print PDF* the system will save a *History* of the *PDF* for you. You can click the *View Icon* to view a *previous PDF* or you can use the *Delete Icon* to *Delete* a previous PDF. We always recommend **NOT** deleting any versions of your PDF's, just in case you need assistance from our Tech Support Department.

You can also generate any of the **Letters** for your estimate on the *Print* tab by clicking on the *Letter* you want to print and click *Generate*. The *Letter* will open in a new window.

Letters

Need more letters? Email us your request. Include as much detail about the letter as you can

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

Final Report

Generate

Send Estimate Tab

Current Estimate 7228221 | Repair Order 10006 | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6... ...$4,801.37

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | **Send Estimate** | Edit Rate Profile | Close Estimate |

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 on that estimate.

Then just **click** on each **email address** or **phone number** you wish to send the estimate to. ****PLEASE NOTE...IT IS RECCOMMENDED 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.****

Then you **_HAVE_** 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 **ATTACHMENTS** 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.

Attachments

Delete View JaneSmith_JeepWrangler_1234_46.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

Estimate

Select Report Type

Full ▼

Select Report Header

Estimate ▼

Add

Once it is attached just scroll back up and click **SEND**.

Send Estimate

New   Send >>   EMS Export

② Add Report Attachments

Once you have sent an e-mail or text the **history** will show below.

Sent Estimate History

Sent	Subject	Recipients	Errors
7/12/2019 8:22:18 PM	Test1234 - Test McTesterson	123-456-8900	✔

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. it will also show you a **Date/Time Stamp** of when the email was sent for record tracking purposes.

Edit Rate Profile Tab

Current Estimate 7228221 | Repair Order 10006 | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $4,801.37

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |
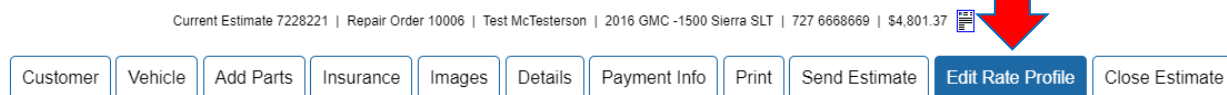
When you have an estimate open you can edit the rate profile ***for just that estimate*** by using the **Edit Rate Profile** tab. Please use the same instructions detailed earlier in this manual for editing your ***Rate Profile***.

When you are done with your estimate you can click the **Close Estimate** tab to go back to your **Manage Estimates Screen**.

Current Estimate 7228221 | Repair Order 10006 | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 6668669 | $4,801.37

| Customer | Vehicle | Add Parts | Insurance | Images | Details | Payment Info | Print | Send Estimate | Edit Rate Profile | Close Estimate |