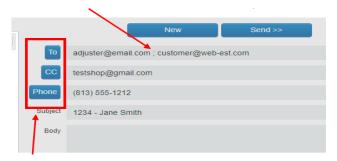


When in the **Send Estimate** tab, you may type the *email address* and/or *phone number* in the **TO** field or the in the **Phone** field if texting (**SMS**).

\*\*\*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.



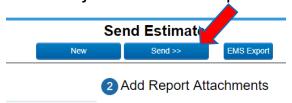
Then just **click** on each **email address** or **phone number** you wish to send the estimate to. \*\*\*PLEASE NOTE...IT IS RECCOMMENDED THAT YOU ALSO CC YOURSELF ON ALL EMAILS, THAT WAY YOU CAN REFER TO THEM IF NEEDED. IT'S JUST ANOTHER WAY TO HAVE DOCUMENTATION OF DATE/TIME STAMPING.\*\*\*

Then you <u>HAVE</u> to <u>attach the estimate</u> 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 <u>REPORT TYPE</u> or <u>REPORT HEADER</u> from the drop-down boxes.



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



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

## Sent Estimate History



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. *This is used a lot of times when determining Rental Car Info.*