

## Send Estimate Tab

Current Estimate 7228221 | Repair Order 10006 | Test McTesterson | 2016 GMC -1500 Sierra SLT | 727 600 54,801.37

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 ( ; )\*\*\***

The screenshot shows the 'Send Estimate' form. A red box highlights the 'To', 'CC', and 'Phone' buttons on the left. A red arrow points from the 'Send Estimate' tab in the top navigation bar to the 'Send >>' button in the top right of the form. The form fields are: To: adjuster@email.com ; customer@web-est.com, CC: testshop@gmail.com, Phone: (813) 555-1212, Subject: 1234 - Jane Smith, and Body.

**OR** simply just click on the **BLUE TO, CC, PHONE** buttons and it will populate the email addresses you have entered on that estimate.

The screenshot shows a 'Select Phone Numbers' dialog box with a list of contacts: Customer - (813) 555-1212, Claimant - (456) 789-7890, Adjuster - (813) 555-1212, Insurance Agent - (813) 555-1212, Claim Representative - (813) 555-1212, and Shop - (888) 932-3780. A red arrow points from the 'Customer' contact to the 'Phone' button in the 'Send Estimate' form. The form fields are: To: adjuster@email.com, CC: (empty), Phone: (813) 555-1212, Subject: 1234 - Jane Smith, and Body.

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.\*\*\***

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