

Estimate For Insurance Company

This document outlines the process of submitting an estimate to an insurance company for confirmation of full or part payment.

Enter the insurance company in to your clients listing as per the image below (*Minimum required*).

The screenshot shows the 'Client Form' window with the following details:

- Client: Tenpest Insurance
- Private: Business: Parent: [Dropdown]
- Tab: Contact Details
- Title: [Dropdown] First Name: [Text]
- Contact: John Hart Salutation: John
- ABN: [Text]
- Ph (Work): [Text] Ph (Home): [Text]
- Mobile: 0413 854 954
- Fax: [Text]
- Email: john@tempestinsurance.com.au
- Address: 44 Stone Street
- Billing Address: [Text]
- Suburb: Wattle Grove
- State/City: WA
- PostCode/Province: 6107
- Use Parent Address:
- Inactive: Opt-out of all marketing:
- Buttons: Cancel, Vehicles, Estimate, Search, OK

Create a new client or edit an existing client and add the insurance company's contact email address in to the clients email address field. Click on the Parent button at the top of the clients form and choose the insurance company in your clients listing as per image below.

The screenshot shows the 'Client Form' window with the following details:

- Client: Thompson
- Private: Business: Parent: Tenpest Insurance
- Tab: Contact Details
- Title: Mr First Name: Peter
- Contact: [Text] Salutation: Peter
- ABN: [Text]
- Ph (Work): [Text] Ph (Home): [Text]
- Mobile: 0414 321 654
- Fax: [Text]
- Email: peter22@gmail.com
- Address: 44 Stone Street
- Billing Address: [Text]
- Suburb: Wattle Grove
- State/City: WA
- PostCode/Province: 6107
- Use Parent Address:
- Inactive: Opt-out of all marketing:
- Buttons: Cancel, Vehicles, Estimate, Search, OK

The screenshot shows the 'Email addresses' dialog box with the following table:

Email address	Title (optional)	Default	CC
peter22@gmail.com	Peter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
john@tempestinsurance.com.au	John Hart	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[Empty]	[Empty]	<input type="checkbox"/>	<input type="checkbox"/>
[Empty]	[Empty]	<input type="checkbox"/>	<input type="checkbox"/>
[Empty]	[Empty]	<input type="checkbox"/>	<input type="checkbox"/>
[Empty]	[Empty]	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Cancel, OK

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Once you have chosen the Parent company copy the clients address in to the comments then place a tick in to the 'Use Parent address.

Create your estimate and prior to clicking OK and saving the estimate email the estimate to the insurance company or both the insurance company and your client. Now sit back and wait for the insurance company to confirm their coverage.

Insurance company will cover the estimate value.

On confirmation that the insurance company gives you the go ahead, go to Estimates – View Estimates. Double click on the estimate invoice number to open the estimate

Date	Inv#	Type	Status	Conv. Job#	Rego	Company/Surname
12/8/22	255	Estimate	Open		1AGY323	Thompson
4/8/22	254	Estimate	Open		YKHKO	John Smith
1/8/22	251	Estimate	Converted	252	I79NA	Anisha Bhandari

Estimate #255 - Opened 12/8/22

Client Details
 Peter Thompson
 44 Stone Street, Wattle Grove WA 6107
 Mobile: 0414 321 654

Vehicle Details
 Rego: 1AGY323 HOLDEN VS UTE V6 EFI 95/01
 Odo: 162000

Item	Description	Type	Order	Quantity	Rate	Total (Ex.)	Tax Amt	Tax Code	Total (Inc.)	FP
Air	Air Conditioning Service	Service		1.45	\$100.00	\$145.45	\$14.55	GST	\$160.00	<input type="checkbox"/>
R134	R134 Refrigerant Gas	Inventory		1.5	\$41.10	\$61.65	\$6.17	GST	\$67.82	
DBSF	Disc Brake Service Front	Service		1.25	\$100.00	\$127.27	\$12.73	GST	\$140.00	<input type="checkbox"/>
BDP1165	Disc Brake Pad	Inventory		1	\$71.78	\$71.78	\$7.18	GST	\$78.96	
BFDOT462	Brake Fluid Dot4	Inventory		0.5	\$13.67	\$6.84	\$0.68	GST	\$7.52	

Work Done
 Check Air Conditioning System For Leaks And Correct Temperature, Re Gas If Required. Check Front Brake System

Vehicle Report
 Two Front Tyres Need Replacing Including A Wheel Alignment At Next Service.

Summary

Item	Value
Total (Ex.)	\$412.99
Tax Total	\$41.31
<input checked="" type="checkbox"/> Rounding	\$0.00
Total (Inc.)	\$454.30

SA/SP: Fred, Johnson
 Order #:
 Source:

Click on the Convert button

Convert Estimate

What do you want to convert this estimate to?

Booking

Job Card

Cancel

Choose a Booking for a future date or Job card to start the job straight away.

Complete job as normal close job and receipt payment from the insurance company, you can send the insurance company a Tax invoice if required no need to provide the client with a Tax invoice at all.

Completed.

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Insurance company will only cover part of the total estimate.

On confirmation that the insurance company gives you the go ahead, go to Estimates – View Estimates. Double click on the estimate invoice number to open the estimate

The screenshot shows the 'Invoices' table with the following data:

Date	Inv#	Type	Status	Conv. Job#	Rego	Company/Surname
12/8/22	255	Estimate	Open		1AGY323	Thompson
4/8/22	254	Estimate	Open		YKHKO	John Smith
1/8/22	251	Estimate	Converted	252	I79NA	Anisha Bhandari

The 'Estimate #255 - Opened 12/8/22' window displays the following details:

Client Details: Peter Thompson, 44 Stone Street, Wattle Grove WA 6107, Mobile: 0414 321 654

Vehicle Details: Rego: 1AGY323, HOLDEN VS UTE V6 EFT, 95/01, Odo: 162000

Parts & Labour:

Item	Description	Type	Order	Quantity	Rate	Total (Ex.)	Tax Amt	Tax Code	Total (Inc.)	FP
Air	Air Conditioning Service	Service		1.45	\$100.00	\$145.45	\$14.55	GST	\$160.00	<input type="checkbox"/>
R134	R 134 Refrigerant Gas	Inventory		1.5	\$41.10	\$61.65	\$6.17	GST	\$67.82	<input type="checkbox"/>
DBSF	Disc Brake Service Front	Service		1.25	\$100.00	\$127.27	\$12.73	GST	\$140.00	<input type="checkbox"/>
BDP1165	Disc Brake Pad	Inventory		1	\$71.78	\$71.78	\$7.18	GST	\$78.96	<input type="checkbox"/>
BFDOT462	Brake Fluid Dot4	Inventory		0.5	\$13.67	\$6.84	\$0.68	GST	\$7.52	<input type="checkbox"/>

Work Done: Check Air Conditioning System For Leaks And Correct Temperature, Re Gas If Required. Check Front Brake System

Vehicle Report: Two Front Tyres Need Replacing Including A Wheel Alignment At Next Service.

Summary:

Item	Value
Total (Ex.)	\$412.99
Tax Total	\$41.31
✓ Rounding	\$0.00
Total (Inc.)	\$454.30

SA/SP: Fred, Johnson
Order #:
Source:

Click on the Convert button

The 'Convert Estimate' dialog box asks: 'What do you want to convert this estimate to?' and provides three options: 'Booking', 'Job Card', and 'Cancel'.

Choose a Booking for a future date or Job card to start the job straight away.

Complete job as normal close job and receipt payment from the insurance company, you can send the insurance company a Tax invoice if required.

The invoice will now be in Sales with the outstanding balance amount ready for payment by the client when they return to pick up the vehicle.

So you can give the client a Tax Invoice addressed to them go to their client form and edit it and remove the tick from the use parent address checkbox.

Copy address previously saved in the comments tab and re-enter in to the address field click on Billing address tab and place a tick in the 'same as address' checkbox click OK to close and save your changes.

Estimate For Insurance Company

The screenshot shows a 'Client Form' window with the following fields and options:

- Client: Thompson
- Private Business
- Parent: Tenpest Insurance
- Tabs: Contact Details (selected), Profile, History, Tasks, Comments, Referrals, Drivers
- Contact Details:
 - Title: Mr
 - First Name: Peter
 - Contact:
 - Salutation: Peter
 - ABN:
 - Ph (Work):
 - Ph (Home):
 - Mobile: 0414 321 654
 - Fax:
 - Email: petertom22@gmail.com
- Address:
 - Address: 349 Albany Highway
 - Suburb: Cannington
 - State/City: WA
 - PostCode/Province: 6107
 - Use Parent Address
- Options:
 - Inactive:
 - Opt-out of all marketing:
- Buttons: Cancel, Vehicles, Estimate, Search, OK

At this point you have the choice to leave the client parented to the insurance company in your clients listing or you can edit the client and delete the parent company name from the parent field this will return the client to a standalone client in your clients listing.

Completed.