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).

| enc Tremp | Jesc mulance | | | Falciic | (None) | | |
|------------|--------------------|--------------------------------|-------|------------|--------------------------|--------------------|-----------|
| Contact de | tails Profile | History | Tasks | Comm | nents | Referrals | Drivers |
| Title | | First name | | Ad | ddress | Billing | g Address |
| Contact | John Hart | Salutation John | | 22 Ston | e Street | | |
| ABN | | | | | | | |
| Ph (Work) | | Ph (Home) | | | | | |
| Mobile | 0413 338 553 | | | | Suburb | Wattle Grove | |
| Fax | | | | | State | wa \sim | |
| Email | john@tempestinsura | ance.com.au | | 🗌 Use p | Postcode arent addres | 3107 ss | |
| | | | C |] Inactive | | Opt-out of all mar | keting |
| | | | | | | | |
| | 4 | | | | | | |

Create a new client or edit an existing client and add the insurance company's contact email address in to the client's 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.

| | pson | | | Private | Business | Parent | Tempest In | iurance | |
|------------|--------------------|---|----------------|--|----------|---------|------------|--------------|----------------|
| Contact de | tails | Profile | Histo | ory | Tasks | Com | ments | Referrals | Drivers |
| Title | | ~ | First name | Peter | | A | ddress | Bi | illing Address |
| Contact | | | Salutation | | | 22 Stor | ne Street | | |
| ABN | | | | | | | | | |
| Ph (Work) | | | Ph (Home) | | | | | | |
| Mobile | 0414 774 | 323 | | | | | Suburb | Wattle Grove | |
| Fax | | | | | | | State | WA ~ | |
| Email | petertom2 | 2@gmail.com | n | | | | Postcode | 3107 | 0 |
| | | | | | | | | | |
| Cancel | io Vehie | in (in the second seco | stimate | Print | Note | Emai | Task | c Delet | |
| Cancel | Vehi | Cles Es | Q stimate | Print | Note | Email | Tas | k Delet | |
| Cancel | vehie | ites Es | timate | Print e (optional) | Note | Email | Default | CC | |
| Cancel | vehia gmail.com | Cles Es | timate Titk | Print e (optional) er Thompson | Note | Email | Default | CC | |
| Cancel | ymail.com | i.au | timate Title | e (optional) er Thompson mpest Insurance | Note | Email | Default | | |

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

| | | | Month to | o date | ~ From | 01/11/24 | To 29/11/2- | 4 Estimat | tes - Al 🛛 🗸 🗸 | | | | | |
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| ate | Inv# | Type | Status | Conv. Jo | Rego | Company/Su | Irname | First Name | Value | Paid | Balance | Emailed Pr | | |
| 7/11/24 | 179 | Estimate | | | IGTR 250 | Conjith | | Peter | \$418.10 | \$0.00 | \$918.10 | | | |
| /11/24 | 1/3 | Esumate | | | AAF303 | Similar | | 585011 | \$104.70 | \$0.00 | \$104.70 | | | |
| | | | | | | | | | \$602.80 | \$0.00 | \$602.80 | | | |
| Client | t | | _ | Job# | | Registration | Make/Mod | | Work done keyword | Orde | # | Amount | | |
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Click on the Convert button

| Convert estimate | R | × |
|------------------|-----------------------|--------------|
| What do you | I want to convert the | estimate to? |
| \bigotimes | Ø | |
| Cancel | Booking | Job card |

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.

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





Click on the Convert button



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.

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.

| Contact details | Profile | History | Tasks | Comm | ents (!) | Referrals | Drivers |
|-----------------|------------------|---------------|-------|----------|--------------|--------------------|----------|
| Title | ~ | First name Pe | ter |]A | ddress | Billing | Address |
| Contact ABN | | Salutation | | 22 Sto | ne Street | | |
| /h (Work) | 774 323 | Ph (Home) | | | Suburb | Wattle Grove | |
| Fax | | | | | State | WA × | |
| Email pete | rtom22@gmail.com | 1 | | Use | parent addre | ss | <u> </u> |
| | | | | Inactive | | Opt-out of all mar | keting |
| | | | | | | | |

Estimate For Insurance Company

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.